



# LEVEL 3 INSURANCE PRACTITIONER

## APPRENTICESHIP STANDARD

### Programme Overview:

- Fully and part **funded learning** and development programme that includes the Cert CII
- Develop the **knowledge, skills and behaviours** of successful Insurance Practitioners
- Role-specific route ways tailor the apprenticeship to the job role:
  - Claims Handler/Loss Adjuster
  - Assistant Underwriter
  - Junior Broker
- **Free CII membership** for non-members through the CII Aspire Apprenticeship Programme
- Includes the CII study e-books and exam entries
  - Resit costs for CII exams and End-Point-Assessment will be covered by the employer
- **Fortnightly workshops** for each CII exam
- All workshops recorded and **available on-demand**
- **Interactive chat, forums and class notebooks** for real time support and assistance from experienced and qualified insurance professionals
- **Exam tips, tricks, and strategies**
- **Regular tutorials and assessments** with your dedicated trainer

### Pre-Requisites:

- Commitment to allocating 6 hours per week of working hours to off-the-job training
- Score at least Level 1 in English and maths initial assessments
- Eligible to live and work in the UK
- Spend at least 50% of your working hours in England

## More Than Just The Exams:

Every Apprenticeship Standard consists of a variety of Knowledge, Skills, and Behaviours that the Apprentice will develop throughout the programme. Insurance Practitioners will develop competence in a set of core duties, and additional duties will be developed through the role-specific route way which is chosen for the apprenticeship.

### Core Duties:

- Commercial
- Analysis & Decisions
- Quality Assurance
- Communicate
- IT Systems
- Data Protection
- Regulatory

The Apprentice's assigned Trainer will carry out a number of assessment methods with the Apprentice based on the above criteria, in order to prepare them for their End-Point-Assessment (EPA). This could include:

- Carrying out **professional discussions**
- **Observing the apprentice** whilst working
- Setting **assignments**
- Gathering **witness testimonies**
- Writing **reflective accounts**

During the programme, the apprentice will also attend workshops on the CII exams before sitting the exams if they do not already hold them.

## MY WORLD MATTERS

My World Matters is a personal development programme designed to develop the spiritual, moral, social and cultural understanding students require to successfully navigate life in modern Britain. Topics include key subjects as understanding extremism, active citizenship and maintaining positive mental health. As a key Ofsted initiative it is important that all Skills Edge Training students fully participate in the programme.

## The Route Ways:

This apprenticeship takes a core and options approach. All apprentices must complete the core. All apprentices must also select one of the specialist options out of:

### CLAIMS HANDLER/LOSS ADJUSTER:

Role-specific duties that the apprentice will develop:

1. Fraud
2. Processing

The typical combination of exams to achieve the Cert CII is:

1. IF1 Insurance, Legal, and Regulatory
2. IF2 General Insurance Business
3. **IF4 Insurance Claims Handling Process**

### ASSISTANT UNDERWRITER:

Role-specific duties that the apprentice will develop:

1. Risks
2. Limits

The typical combination of exams to achieve the Cert CII is:

1. IF1 Insurance, Legal, and Regulatory
2. IF2 General Insurance Business
3. **IF3 Insurance Underwriting Process**

### JUNIOR BROKER:

Role-specific duties that the apprentice will develop:

1. Represent
2. Products & Services

The typical combination of exams to achieve the Cert CII is:

1. IF1 Insurance, Legal, and Regulatory
2. IF2 General Insurance Business
3. **I10 Insurance Broking Fundamentals**



## 6 hours per week Off-The-Job Training

To be eligible for government funding, all full-time apprentices (those that work 30 hours per week or more) must spend a minimum of 6 hours per week on off-the-job training over the planned duration of the practical period. Training is an essential part of an apprenticeship and must take place during employed time. Employers may find that what they offer as part of their existing learning and development delivery counts towards the 6 hours of- the- job training. For example, revision towards CII exams, use of insurance/Broker/Financial Assess and attendance at Local Institute events.

## Portfolio Build:

In preparation for the Reflective Discussion element of the End-Point-Assessment, the apprentice will compile a portfolio of evidence; examples of their best work produced throughout the apprenticeship which demonstrate that they meet the knowledge, skills and behaviours required to achieve the programme.

## Assessment Gateway:

The decision on **whether or not the Apprentice is ready** for end-point assessment will be made by the employer supported by Skills Edge Training.

An Apprentice will be put forward for end-point assessment when it is felt that they have achieved the required experience in the work-place to put them in the best possible position to achieve success. This can include but is not limited to:

- Passing the required **professional exams** (compulsory)
- Completion of their **off-the-job training** log which demonstrates they have met the knowledge, skills and behaviours detailed in the standard
- Evidence from **performance appraisals** conducted by their line manager
- Feedback from **progress reviews** completed by Skills Edge Training

## End-Point-Assessment:

The End-Point-Assessment (EPA) is conducted by an independent organisation, who will assess the Apprentice's knowledge, skills and behaviours through the following methods:

### 1. Reflective discussion

A structured interview with the Training Provider to explore the content of the portfolio and the learner journey in more detail.

### 2. Case Study Test

Delivered via one-to-one questioning with the independent assessor. It is based on two fictitious insurance scenarios which are tailored to the role.

### 3. IF1 Insurance, Legal and Regulatory Exam

The Apprentice is awarded an overall grade for their apprenticeship based on their EPA, of Fail, Pass, or Distinction.

As of February 2022, 81% of our Finance and Insurance Apprentices have achieved Distinction. 100% of our apprentices passed first time.

## CII Aspire Apprenticeships:

Skills Edge Training is an **approved provider** of the Chartered Institute's CII Aspire Apprenticeships Programme.

CII Aspire Apprenticeship Programmes help you to build the right expertise in your business and make it easier for you to attract and develop the best people.



Chartered  
Insurance  
Institute

**Aspire  
Apprenticeships**



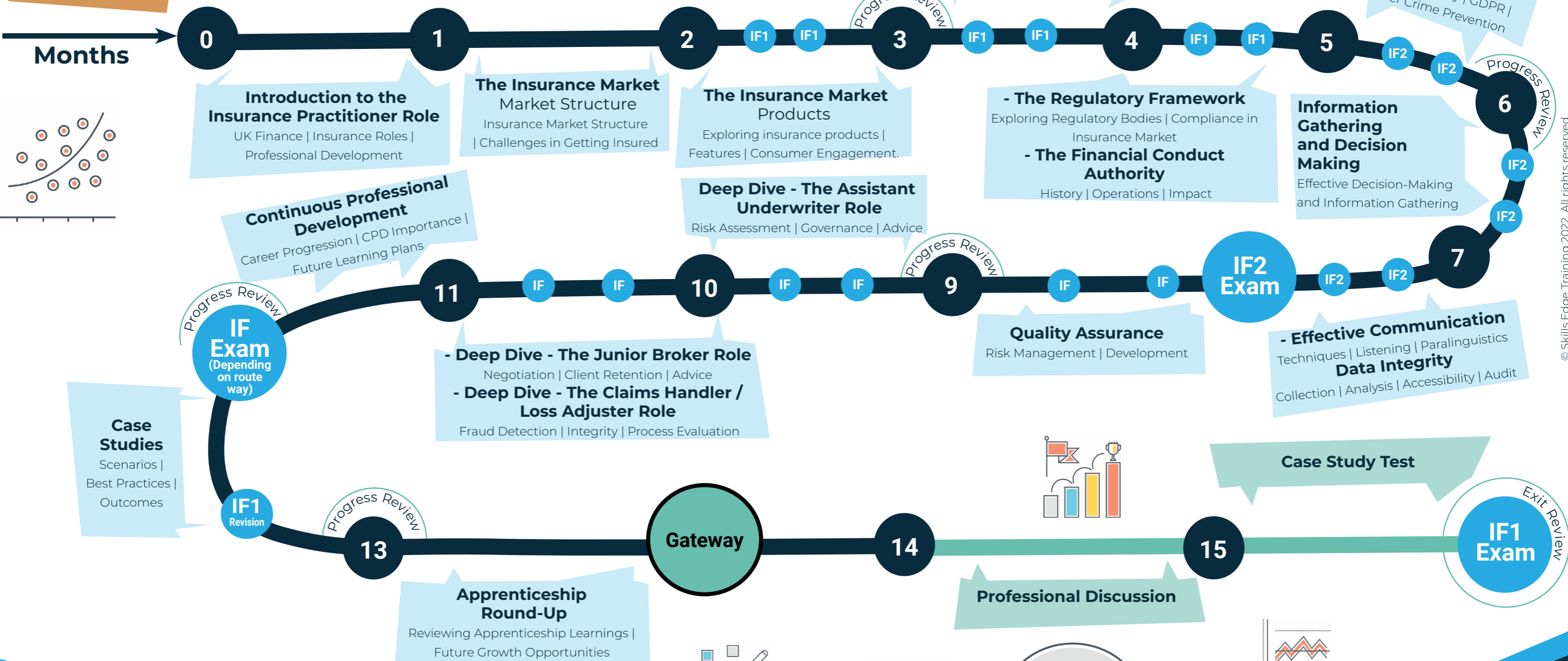
# Level 3 Insurance Practitioner Journey

Initial Assessment  
Enrolment  
Training Plan

**My World Matters:**  
British Values | PREVENT | Equality & Diversity | Safeguarding | E-Safety  
Transgender Awareness | Employment | Positive Mental Health

**Commercial Aims and Objectives**  
Understanding Insurance Business Models  
| Roles | KPIs | Effective Communication

**Consumer Duty and UK GDPR**  
Consumer Duty | GDPR |  
Cyber Crime Prevention



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Chartered  
Insurance  
Institute

Aspire  
Apprenticeships



## Don't Just Take Our Word For It...

*"I wish I'd known earlier how easy it would be and how quickly I'd see the value. My apprentice is growing and learning all the time. He came to us from school after his A-levels."*

*"As I move through the programme, I am learning a wide range of information within the insurance industry that I had little or no knowledge of before. This has helped me within my work place but also on a personal level with searching for my own types of insurance."*

## CONTACT US TODAY

- **81% of our Insurance and Finance learners have achieved a Distinction\*** in their End-Point-Assessment
- We deliver apprenticeships and training **across the country**
- We employ **industry professionals** who hold all of the exams they teach, as well as having years of experience in industry
- Apprentices benefit from our internal **qualified End-Point-Assessor** to guide them through their EPA
- We are an **Ofsted Grade 2** Training Provider

\*As of February 2022

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