



**Australian Government**

# **FNSILF416 Manage information for claims assessments**

**Release: 1**

## FNSILF416 Manage information for claims assessments

### Modification History

| Release   | Comments                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Release 1 | <p>This version first released with FNS Financial Services Training Package Version 7.0.</p> <p>Supersedes and is not equivalent to FNSILF406 Collect and manage information to facilitate claims assessment.</p> <p>Minor changes to title, application, elements and foundation skills. Significant rewording of performance criteria.</p> <p>Performance evidence and knowledge evidence updated to clarify intent.</p> |

### Application

This unit describes the skills and knowledge required to request, collect and manage information needed to verify life insurance claims.

The unit applies to individuals who use specialised knowledge and organisational skills to manage information used to assess claims in life insurance organisations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

### Unit Sector

Life insurance

### Elements and Performance Criteria

| ELEMENT                                                         | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                                                                                                                                   |
|-----------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Elements describe the essential outcomes.</i>                | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>                                                                                                                                                                                                                                                                                                 |
| 1. Determine information needs relating to life insurance claim | <p>1.1 Identify information required to make initial and ongoing eligibility decisions pertaining to life insurance policy</p> <p>1.2 Review current information in claim file against life insurance policy terms and conditions</p> <p>1.3 Identify additional information and investigation required to determine eligibility</p> <p>1.4 Document rationale for additional information required</p> |

| ELEMENT                          | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                  | according to organisational policies and procedures                                                                                                                                                                                                                                                                                                                                                                                                       |
| 2. Plan information collection   | 2.1 Identify sources required to obtain identified required information<br>2.2 Identify method required to collect information according to customer needs and organisational policies and procedures                                                                                                                                                                                                                                                     |
| 3. Collect and store information | 3.1 Collect information from required sources according to organisational policies and procedures<br>3.2 Manage information according to code of ethics and legislative and regulatory requirements<br>3.3 Identify issues requiring escalation and consult organisational personnel as required, according to organisational policies and procedures<br>3.4 Summarise information obtained and store according to organisational policies and procedures |

## Foundation Skills

*This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.*

| Skill                   | Description                                                                                                                                                                                                                                                   |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Numeracy                | <ul style="list-style-type: none"> <li>Interprets numerical information according to organisational policies and procedures</li> </ul>                                                                                                                        |
| Oral communication      | <ul style="list-style-type: none"> <li>Uses active listening and questioning techniques to extract relevant information and confirm understanding</li> <li>Selects and uses required communication conventions and protocols to liaise with others</li> </ul> |
| Reading                 | <ul style="list-style-type: none"> <li>Gathers, analyses and interprets simple to complex information from a range of sources</li> </ul>                                                                                                                      |
| Writing                 | <ul style="list-style-type: none"> <li>Produces texts of varying complexity using technical and industry language, grammar and logical sequencing to convey and record information</li> </ul>                                                                 |
| Planning and organising | <ul style="list-style-type: none"> <li>Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effectiveness</li> <li>Systematically gathers and analyses required information</li> </ul>                    |
| Problem solving         | <ul style="list-style-type: none"> <li>Evaluates options to inform decisions about collection methods</li> </ul>                                                                                                                                              |
| Self-management         | <ul style="list-style-type: none"> <li>Follows legislative and regulatory requirements; organisational policies and procedures; and code of ethics</li> </ul>                                                                                                 |

| Skill      | Description                                                                                                               |
|------------|---------------------------------------------------------------------------------------------------------------------------|
| Technology | <ul style="list-style-type: none"><li>• Uses key features and functions of digital tools to complete work tasks</li></ul> |

## Unit Mapping Information

No equivalent unit. Supersedes and is not equivalent to FNSILF406 Collect and manage information to facilitate claims assessment.

## Links

Companion Volume Implementation Guide is found on VETNet - -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>