



Australian Government

FNSILF406 Collect and manage information to facilitate claims assessment

Release: 1

FNSILF406 Collect and manage information to facilitate claims assessment

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to collect, collate and manage information to verify, investigate and assess insurance claims.

It applies to individuals who use specialised knowledge and organisational skills to effectively manage information.

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. Identify information needs	1.1 Review claim files and life insurance policy to identify payment criteria 1.2 Identify additional information needed as evidence for claims assessment
2. Plan information collection	2.1 Identify appropriate sources of required proofs 2.2 Select and enact an appropriate information collection method
3. Collect and manage information	3.1 Collect additional information from appropriate sources in accordance with procedures 3.2 Manage investigations in accordance with ethical and

ELEMENT	PERFORMANCE CRITERIA
	regulatory requirements 3.3 Consult appropriate personnel within organisation where investigations reveal need to escalate issues for clarification 3.4 Organise information for clarity and accessibility in accordance with procedures

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Skill	Performance Criteria	Description
Reading	1.1, 1.2, 2.1, 3.1, 3.4	Gathers, analyses and interprets simple to complex information from a range of sources and identifies relevant information
Writing	2.1, 3.1, 3.4	Produces texts of varying complexity using appropriate technical and industry language, grammar and logical sequence to convey and record information accurately and effectively
Oral Communication	3.1, 3.3	Uses active listening and questioning techniques to extract relevant information and confirm understanding
Numeracy	1.1	Interprets numerical information and performs basic calculations in accordance with organisational guidelines
Navigate the world of work	3.1-3.4	Recognises and follows legislative and ethical requirements, explicit and implicit protocols, policies and procedures
Interact with others	2.2, 3.2, 3.3	- Selects and uses appropriate communication conventions and protocols to liaise with others - Adjusts personal communication style in response to the values, beliefs and cultural expectations of others
Get the work done	1.1, 1.2, 2.1, 2.2, 3.1-3.4	- Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effectiveness - Systematically gathers and analyses all relevant information and evaluates options to inform decisions about collection methods - Uses the main features and functions of digital tools to

		complete work tasks
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Unit Mapping Information

Code and title Current version	Code and title previous version	Comments	Equivalence status
FNSILF406 Collect and manage information to facilitate claims assessment	FNSILF406A Collect and manage information to facilitate claims assessment	Updated to meet Standards for Training Packages. Minor edits to clarify intent of performance criteria.	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet -

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

Assessment Requirements for FNSILF406 Collect and manage information to facilitate claims assessment

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Performance Evidence

Evidence of the ability to:

- gather information in a format suitable to facilitate assessment of claims
- perform claims assessment tasks in accordance with relevant procedures and regulatory requirements.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline life insurance administrative requirements relating to life insurance claims assessment
- explain life insurance policy payment criteria
- outline life insurance policy terms and conditions
- outline organisational procedures relating to life insurance claims assessment
- explain organisational systems for data entry and filing
- explain product information
- outline relevant regulatory requirements relating to life insurance claims assessment
- outline potential areas in the claims process that may require detailed investigation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the life insurance field of work and include access to:

- office equipment, technology, software and consumables
- organisational records, policy and procedures.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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