



**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<br>1.2 Identify additional information needed as evidence for claims assessment |
| 2. Plan information collection                   | 2.1 Identify appropriate sources of required proofs<br>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<br>3.2 Manage investigations in accordance with ethical and         |

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

## 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     | <ul style="list-style-type: none"> <li>Gathers, analyses and interprets simple to complex information from a range of sources and identifies relevant information</li> </ul>                                                                                                                                                                                                        |
| Writing                    | 2.1, 3.1, 3.4               | <ul style="list-style-type: none"> <li>Produces texts of varying complexity using appropriate technical and industry language, grammar and logical sequence to convey and record information accurately and effectively</li> </ul>                                                                                                                                                  |
| Oral Communication         | 3.1, 3.3                    | <ul style="list-style-type: none"> <li>Uses active listening and questioning techniques to extract relevant information and confirm understanding</li> </ul>                                                                                                                                                                                                                        |
| Numeracy                   | 1.1                         | <ul style="list-style-type: none"> <li>Interprets numerical information and performs basic calculations in accordance with organisational guidelines</li> </ul>                                                                                                                                                                                                                     |
| Navigate the world of work | 3.1-3.4                     | <ul style="list-style-type: none"> <li>Recognises and follows legislative and ethical requirements, explicit and implicit protocols, policies and procedures</li> </ul>                                                                                                                                                                                                             |
| Interact with others       | 2.2, 3.2, 3.3               | <ul style="list-style-type: none"> <li>Selects and uses appropriate communication conventions and protocols to liaise with others</li> <li>Adjusts personal communication style in response to the values, beliefs and cultural expectations of others</li> </ul>                                                                                                                   |
| Get the work done          | 1.1, 1.2, 2.1, 2.2, 3.1-3.4 | <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 all relevant information and evaluates options to inform decisions about collection methods</li> <li>Uses the main features and functions of digital tools to</li> </ul> |

|  |  |                     |
|--|--|---------------------|
|  |  | complete work tasks |
|--|--|---------------------|

## Unit Mapping Information

| Code and title<br>Current version                                        | Code and title<br>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.<br>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>