



Australian Government

Assessment Requirements for FNSSUP407 Assess complex superannuation benefit or insurance claims

Release: 1

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Modification History

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

Performance Evidence

Evidence of the ability to:

- review validity of requests and related documentation and evidence
- determine entitlements according to organisational authority levels, fund entitlements and operating guidelines
- follow appropriate payment criteria according to the terms and conditions of the trust deed, relevant legislation and organisational procedures.

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:

- describe the key features of relevant legislation relating to superannuation
- outline the organisational authority levels
- explain the key aspects of fund entitlements and operating guidelines
- identify appropriate payment criteria according to relevant trust deed, legislation or organisational procedure
- explain the application of fund policies and procedures on the assessment of superannuation benefit or insurance claims
- outline recent changes to products and services, and implications for assessments.

Assessment Conditions

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

- common office equipment, technology, software and consumables

- organisational financial records
- organisational policy and procedures.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

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