




Apprenticeship standard (England only)

Insurance Practitioner

Industry: Legal, finance and accounting

City & Guilds code: 7414-13

 **Typical duration:** 12 months
 **Maximum funding:** £7,000*
 **Level 3**

*Funding information accurate as of October 2018.
For the most up-to-date information, check the [Institute for Apprenticeships and Technical Education \(IfATE\) website](#).

About the standard

The insurance practitioner is an entry-level role into the industry. Duties could include providing support in the acquisition of new clients and retaining existing clients through the renewal process. They also handle client queries on products, services and accounting, process and analyse data to support business objectives, prepare documentation, reports and market research as well as general office administration, maintaining internal and external relationships and complying with regulatory requirements.

This apprenticeship provides professional membership to the Chartered Insurance Institute and/or the Chartered Institute of Loss Adjustors.

BEIS approved the new standard in November 2014 and replaced the advanced apprenticeship in Providing Financial Services (General Insurance Pathway) for England SASE framework.

On-programme: what apprentices need to learn

Apprentices need to complete 20% off-the-job training during the on-programme phase of their apprenticeship. Specific rules govern this and it must take place in the apprentice's contracted hours.

Apprentices must also complete a supporting qualification. This is either the Certificate in Insurance (Cert CII) or the Certificate in Claim Handling (Cert CILA). There are different routes to achieve the credits required for these qualifications, the route selected will depend on the individual business but must include the mandatory modules as specified by the awarding body.

Summative assessment of knowledge, skills and behaviours required in the delivery of the Level 3 Insurance Practitioner apprenticeship are broken down into the following modules.

Knowledge

- Insurance market
- Risk and Regulatory
- Clients and Colleagues
- Processes and Procedures
- Commercial awareness.

Skills

- Technical Ability
- Relationship development
- Effective working
- Governance.

Behaviours

- Drive to excel
- Communication
- Personal Accountability
- Innovation
- Professionalism.

Refer to the [IfATE website](#) for further details on the standard and assessment plan.

City & Guilds has developed teaching and learning materials to support employers and learning providers to deliver on and off-the-job learning for this standard. For more information, [visit our webpage for Insurance Practitioner here](#).





Gateway requirements

Before you can book end-point assessment (EPA), the provider and employer sign off that the apprentice will be ready for EPA.

For this standard, the employer and provider will need to sign a declaration to agree the apprentice has met the relevant Insurance Practitioner knowledge, skills and behaviours as set out in the standard.

To move on to EPA the line manager and training provider will review the apprentice's progress. They agree whether the apprentice has achieved the competency levels needed or they will suggest a remedial plan if required.

As part of our EPA service, City & Guilds will check all gateway evidence before the EPA event so you can have the confidence that the apprentice is ready for EPA.



EPA: how apprentices demonstrate their learning

EPA is the final stage that an apprentice goes through to complete their apprenticeship. The apprentice must demonstrate their learning to an independent end-point assessor. Assessment events for this standard are:



Reflective discussion

A structured interview with the training provider to explore the content of the portfolio and the apprentice's journey in more detail.

The purpose is to:

- clarify any questions about the evidence presented in the portfolio
- present any aspects of the standard that are not already evidenced in the portfolio through discussion of how the apprentice performs their role
- discuss how the apprentice has progressed in their role, what they have done and their approach to their work.



Portfolio of work

The apprentice will compile a portfolio of work during the end-point assessment. This could be from a range of evidence. The most appropriate types will be identified through discussion with the employer, training provider and apprentice, taking into account the job role and internal systems and processes.

A minimum of three different types of evidence are needed to demonstrate competence and authenticate the assessment. Examples could be written work or case studies, internal compliance audits, project work done in the role, formal performance review, appraisal or CPD log.

City & Guilds will allocate a skilled and experienced professional to assess the apprentice objectively against the standard. All assessments are standardised and quality assured.

To help you prepare apprentices and ensure they feel ready for assessment, we have created a suite of preparation resources, including:

- **EPA pack:** Details behind the standard and assessment plan, guidance on EPA tasks and grading, procedures for re-sits, timelines, venue and resource requirements for EPA. It is important that you are familiar with this information
- **EPA preparation tool:** Personalised login for each apprentice with useful learning resources relevant to the assessment skills required for their standard, ensuring they feel ready for their EPA experience

- **recording forms:** Supporting you to complete key stages of EPA readiness, we have prepared forms to give you peace of mind and confidence that everything is covered
- **LIEPA report:** A report produced by our lead independent end-point assessor (LIEPA) with insight into the EPA results for this standard and findings across all centres. These reports can help you refine your delivery to improve success rates
- our dedicated **EPA customer success team** will be on hand to support you through your EPA journey.





Apprenticeship certification

As well as receiving their IfATE apprenticeship certificate, the apprentice will receive a City & Guilds statement of achievement for EPA.

Why choose City & Guilds?

Personal support: Our dedicated EPA customer success team, Technical Advisors, Business Managers and Customer Service teams are on hand to help you throughout your apprenticeship journey.

Teaching tools and resources: All of our resources are mapped comprehensively to the standard and designed to draw out the skills, knowledge and behaviour apprentices need so they are confident for assessment and you know that everything is covered.

EPA support resources: Our specially created EPA resources will help you to prepare apprentices and ensure a smooth booking process.

EPA delivery: We are growing our EPA service, using new technologies to enhance the delivery and management of EPA.

Pricing that works for you: When you choose us for EPA, you pay a small registration fee and the balance once the EPA has taken place and results submitted.

Events and webinars: We deliver a range of events and webinars run by industry specialists to advise and guide you.

Progression: The journey never stops and we're committed to helping learners progress into a job, develop on the job and move into the next job. Visit our website [cityandguilds.com](https://www.cityandguilds.com) for our wider offering in this sector and information about leadership and management apprenticeships.



More information

If you're a City & Guilds centre, visit Walled Garden or contact your Business Manager for prices and any further information.

If you're a new customer, contact apprenticeships@cityandguilds.com to find out more.

Or visit [cityandguilds.com/apprenticeships](https://www.cityandguilds.com/apprenticeships) for full information on our apprenticeship products and services.

Visit [i-l-m.com/apprentice](https://www.i-l-m.com/apprentice) for information on management apprenticeships.