



The Insurance Practitioner Apprenticeship

# Work Practice Assessment

Claims Handler

*In partnership with*



Ollscoil  
Teicneolaíochta  
an Atlantaigh

Atlantic  
Technological  
University



DEVELOPING  
YOUR FUTURE  
IN FINANCE



GENERATION  
APPRENTICESHIP  
[www.apprenticeship.ie](http://www.apprenticeship.ie)

# Work Practice Assessment

## **Role of Claims Handler:**

The role involves working for an Insurance Company or a Loss Adjuster administering and investigating claims and negotiating fair settlement in line with Company standards. They will spend the majority of their time liaising with Customers, Brokers, Company Service Providers (InjuriesBoard.ie, solicitors, loss assessors, loss adjusters, appraisers, surveyors) and Claimants in person, by telephone and by written correspondence. They will manage first notification of loss, to determination of liability through to settlement and will spend the majority of their time evaluating and processing claims, interpreting/applying policy wordings, liaising with suppliers to ensure repair, replacement and supply of appropriate goods and services, managing customer interactions, liaising with suppliers, claims investigators, solicitors and other claims parties. They could be based in a contact centre, central unit or field based dealing with customers and third parties on a one to one basis, although they will also work with other colleagues and be part of a team. They will have strong communication, negotiation and organisation skills.

**Apprentices** - please agree your own work objectives with your Supervisor in advance of each Semester as you work through this three-year programme. If you change role and Supervisor during the semester, please complete one for each role and sign off from the relevant Supervisor for the period in question.

**Supervisors** – you are required to assess each work task and allocate a rating of Excellent, Good or Fair with accompanying commentary. You are also required to confirm that the apprentice has completed the Underwriting assessment tasks to a competent level and is ready to proceed to the next stage of the apprenticeship programme.

The tasks below are EXAMPLES only and represent entrant level competency. Please feel free to adapt or replace these to suit your own organisation. A minimum of 5 tasks is required. Please agree your own work objectives with your Supervisor in advance of each Semester as you work through this three-year programme. If you change role and Supervisor during the semester, please complete one for each role and sign off from the relevant Supervisor for the period in question.

**Apprentice Name****Year Started****Employer Name****Period of Review**

<b>Work Task</b>	<b>Supervisors Assessment</b>	<b>Supervisors Comments on Apprentice Performance</b>
Is able to use the system (claims tool) effectively to evaluate and verify the claim including processing of data.	<b>EXCELLENT</b>	
	<b>GOOD</b>	
	<b>FAIR</b>	
Understands structure and component parts of insurance policy/wording applying to the claim including exclusions and excesses.	<b>EXCELLENT</b>	
	<b>GOOD</b>	
	<b>FAIR</b>	
Has ability to progress negotiations (internal & external) to ensure effective claims handling on simple cases within authority.	<b>EXCELLENT</b>	
	<b>GOOD</b>	
	<b>FAIR</b>	
Understands the reasons why a claim could be escalated for further investigation for potential fraud	<b>EXCELLENT</b>	
	<b>GOOD</b>	
	<b>FAIR</b>	
Is able to communicate effectively with customers and other relevant parties to the claim	<b>EXCELLENT</b>	
	<b>GOOD</b>	
	<b>FAIR</b>	

Is able to explain the  
specific terms/conditions  
applying to the policy  
cover to customers

**EXCELLENT**

**GOOD**

**FAIR**

**Insert your own...**

**EXCELLENT**

**GOOD**

**FAIR**

## Supervisor Summary

**OVERALL  
RATING**

**COMMENTS**

**EXCELLENT**

**GOOD**

**FAIR**

## **SUPERVISOR**

I confirm that .....has successfully completed the Underwriting assessment tasks above to a competent level and is ready to proceed to the next stage of the apprenticeship programme.

Signed ..... (Supervisor)

Role in Company .....

Date .....

## **APPRENTICE**

Signed ..... (Apprentice)

Date .....

Date scanned copy uploaded to Moodle: .....