



# OCCUPATIONAL CERTIFICATE: INSURANCE AGENT: INSURANCE UNDERWRITER

(SAQA ID: 91784)



**Qualification Title:**  
Occupational  
Certificate  
Insurance Underwriter



**SAQA Qualification ID**  
91784



**NQF Level**  
Level 5



**Total Credits**  
156



**Duration**  
12 Months



**Training Days**  
16 Days spread over 12  
Months



**Blended**  
Online with Face to  
face/remote contact  
sessions



**Assessment Quality  
Partner**  
INSETA

## Purpose of the qualification

The purpose of this qualification is to prepare a learner to evaluate and interpret information to protect stakeholders' interests by using specialist technical knowledge to determine, price, manage and transfer risk.

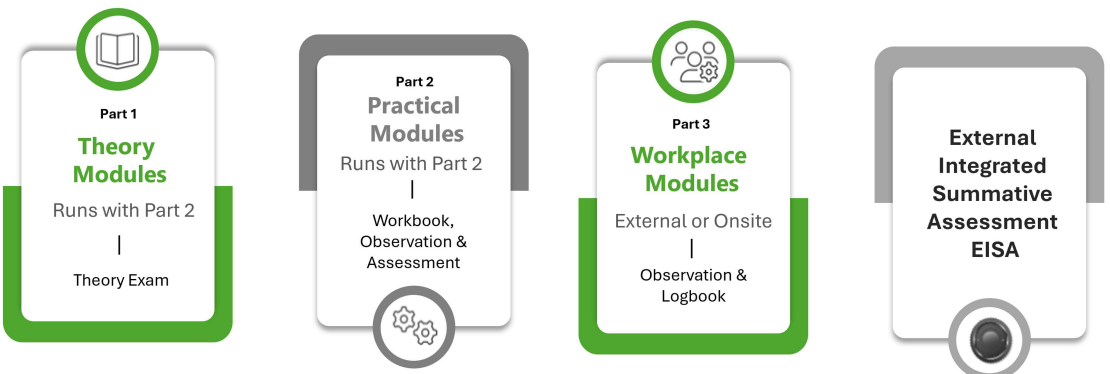
## Target Audience

Learners can be taken from a wide range of individuals, including those with experience in the Insurance industry and new entrants.

## Entry Requirements

NQF Level 4 and/or equivalent, or at least three years of Insurance related work experience.

## Course Structure



### 1. Knowledge Modules(48 Credits).

MODULE ID	Title	NQF Level	Credits
KM-01	Administration and record keeping in Insurance.	4	16
KM-02	Insurance Risk Management for Underwriters.	5	16
KM-03	Application of Legal and Insurance principles.	5	8
KM-04	Rating and Pricing of insurance risks and products.	5	8



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## 2. Practical Skill Modules(40 Credits).

MODULE ID	Title	NQF Level	Credits
PM-01	Apply and adhere to operational and administrative procedures and practices.	5	13
PM-02	Evaluate risk information to determine risk profile and manage risk exposure.	5	8
PM-03	Understanding and applying basic legal and insurance principles to underwriting recommendations.	5	6
PM-04	Understanding and applying knowledge of product and pricing to underwrite profitable risks.	5	13



## 3. Work Experience Modules(68 Credits).

MODULE ID	Title	NQF Level	Credits
WM-01	Records maintained accurately and effectively.	5	17
WM-02	Risk exposure is managed.	5	12
WM-03	Legal and insurance principles applied.	5	12
WM-04	Competitive rating applied.	5	27



### Course Outcome

- Apply and adhere to operational and administrative procedures and practices.
- Evaluate risk information to determine risk profile and manage risk exposure.
- Understand and apply basic legal and insurance principles to underwriting recommendations.
- Understand and apply knowledge of product and pricing to underwrite profitable risks.



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## Assessment Methods

- **Internal Assessments:** Learners will be assessed through practical demonstrations, role-playing scenarios, and written tests covering all knowledge and practical skill modules.
- **Workplace Evidence:** Learners must provide documentary evidence of their practical work, signed off by supervisors, to demonstrate competence in real-world settings.
- **Final Integrated Summative Assessment:** A final assessment to evaluate the learner's comprehensive understanding and application of the course material.



## Certification

- **Occupational Certificate:** Insurance Agent: Insurance Underwriter certificate awarded by the QCTO upon successful completion of the EISA.



## Articulation Options

### Horizontal Articulation

- Any other qualification at NQF Level 5 with cross-cutting credits in the Knowledge Specifications.

### Vertical Articulation

- Advanced Certificate or a Diploma at NQF Level 6 in any of the related areas, such as Finance, Selling, Real Estate, Insurance.



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