Structure of My Portfolio

There are different types of post session tasks on my portfolio. Below describes each of them to help better understand why we use them and what they are used for.

Session questions:
These questions are asked to reiterate learning and allow your facilitator to check your understanding after your session.

Learning Journal:
Using a learning journal will allow you to track your learning and highlight any areas needed for support, which will enable you to achieve more in your apprenticeship. This will make your gateway and EPA much smoother, as you will have a logged your learning as you went, enabling easy reflection.

Progress Review:
A more formal review which is mandatory for your apprenticeship success. It enables City Skills, your employer and your facilitator to check in on progress, as well as including safeguarding matters and learning within the form.

Progress Review 1-1 session:
The completion of your progress review will then lead to a one-to-one with your facilitator where you can actively discuss your review and any concerns you or they may have.

Evidence Gathering:
Your facilitator will let you know what evidence will be required to gather. Evidence gathering enables you to start building up evidence for your portfolio.

One-to-one Pre-work:

Structure of My Portfolio

Below shows the order of your facilitator sessions and what should be completed on My Portfolio after each session.

LM1 - 14th September 2021

LM1 session 1
- Session 1 Questions
- Learning Journal Reflection 1

LM1 session 2
- Session 2 Questions
- Learning Journal Reflection 2

LM1 session 3
- Session 3 Questions
- Learning Journal Reflection 3

LM1 session 4
- Session 4 Questions
- One-to-one Pre-Work (session 4)
- Learning Journal Reflection 4

- Progress Review 1 (PR1)
- PR1 leads to a 1-1 Review Session

LM2 - 25th January 2022

LM2 session 5
- Session 5 Questions
- Evidence Gathering (session 5)
- Learning Journal Reflection 5

LM2 session 6
- Session 6 Questions
- Evidence Gathering (session 6)
- Learning Journal Reflection 6

LM2 session 7
- Session 7 Questions
- Evidence Gathering (session 7)
- Learning Journal Reflection 7

LM2 session 8
- Session 8 Questions
- One-to-one Pre-Work (session 8)
- Learning Journal Reflection 8

- Progress Review 2
- 1-1 Review Session

I10 - 3rd May 2022

I10 Session 9
- Session 9 Questions
- Evidence Gathering (session 9)
- Learning Journal Reflection 9

Structure of My Portfolio

I10 Session 10
- Session 10 Questions
- Evidence Gathering (session 10)
- Learning Journal Reflection 10

I10 Session 11
- Session 11 Questions
- Evidence Gathering (session 11)
- Learning Journal Reflection 11

I10 Session 12
- Session 12 Questions
- One-to-one Pre-Work (session 12)
- Learning Journal Reflection 12

- Progress Review 3
- 1-1 Review session

EPA Preparation- July

EPA Preparation Session 13
- Progress review 4

You also have documents to upload onto my portfolio during your apprenticeship, see the next page for details.

Structure of My Portfolio

Below shows the KSBs of your apprenticeship and how they are met.

The 'Professional Discussion underpinned by Portfolio' is the evidence you will need to upload on my portfolio.

Assessment Method	Key
Professional Discussion underpinned by Portfolio	P
Case Study Test	C
Examination	E

Knowledge	Method
K1 How own role supports the insurance organisations strategic vision, commercial aims and objectives.	**p**
K2 The range of potential insurance data and other information sources and how to use this to make informed judgements.	E
K3 Take appropriate action on insurance issues within the limits of own authority and the relevant escalation procedures.	E
K4 Engage with all relevant stakeholders - internal and/or external, to ensure successful insurance conclusions within the limits of their authority.	E
K5 The principles of data integrity, including its importance and application.	**P**
K6 Techniques for working compliantly, including the insurance policies and procedures to be followed.	E
K7 Techniques for verifying and recording customer information securely using an IT system.	**P**

Structure of My Portfolio

Knowledge	Method
K8 Verify and record customer identity, in accordance with data protection (GDPR), Financial Conduct Authority (FCA) regulation Anti-Money Laundering/Combating the Financing of Terrorism (AML/CFT) and Know your Customer and organisational procedures.	E C
K9 Fraud indicators specific to the claims handled including the potential consequences of not managing risk.	C
K10 The claims handling process.	C
K11 Risk indicators specific to the underwriting processes	C
K12 The underwriting limits operating within the area of responsibility.	C
K13 Insurance products and services are available in the relevant market sector and appropriate for the client.	C
K14 The organisational structures and control systems that are designed to ensure efficiency and accountability.	

Skills	Method
S1 Achieve desired business outcomes within own area of insurance responsibility, in line with the organisation's commercial aims and objectives.	**P**
S2 Identify information from a range of sources to determine an appropriate course of action including a recommendation, a decision or a referral.	C

Structure of My Portfolio

Skills	Method
S3 Analyse data to make evidence-based decisions.	C
S4 Apply organisational quality assurance policies and procedures in their role and within the limits of their own authority.	P
S5 Apply the appropriate method of communication for the audience and circumstances.	P
S6 Records verify, maintains and where appropriate, shares information.	P
S7 Compliant with relevant governance, policies and procedures.	C
S8 Identify work with stakeholders and creates and maintains a network of stakeholders needed to undertake casework effectively and to a conclusion.	P
S9 Balances competing for priorities in order to meet deadlines.	P
S10 Identify potential claims fraud and determine the correct action to prevent loss.	C
S11 Builds and maintains positive relationships.	P
S12 Manage insurance claims and/or payments within the limits of responsibility in line with policies and procedures.	C

Structure of My Portfolio

Skills	Method
S13 Identify and manage insurance risks within the limits of responsibility in line with policies and procedures.	C
S14 Gather and interpret relevant information to provide a return on insurance decisions.	C
S15 Match clients' needs with available insurance products and services.	C
S16 Recommend insurance and premiums decisions within the limits of responsibility and in line with organisational policies and procedures.	C
S17 Optimises the potential return on insurance decisions within the scope of own role by identifying and positioning the client's case with the insurer.	C
S18 Work as part of a team to help achieve results.	**P**

Behaviours	Method
B1 Adopts a positive approach to seeing challenging insurance-related situations through to completion.	**P**
B2 Actively listens and asks constructive questions in order to build relationships effective to insurance outcomes.	**P**
B3 Looks to keep up to date with relevant Insurance matters by taking ownership of their own learning plan.	**P**

Structure of My Portfolio

Behaviours	Method
B4 Seeks out areas of their insurance delivery that might be improved and is proactive in offering their own ideas for change.	**P**
B5 Displays honesty and integrity in their actions. Shows desire to do the right thing, displaying tact and diplomacy in their dealings with others.	**P**
B6 Empathetic and un-bias approach to supporting customers. Show the necessary resilience and stand by difficult decisions	**P**

The Insurance Practitioner Showcase course is for uploading your best evidence documents. This can be done anytime during your Insurance Practitioner Apprenticeship, however, It is designated for your best work, and so it is more likely to be benficial to use further on in your apprenticeship than when you first start.

That being said, you can always uplaod more than once for the same KSB. If you have uplaoded document and decide you would like to change or edit it, you can reupload in the same area, and it will then also save that document.

City Skills