



Draft Preview

DRAFT APPRENTICESHIP ASSESSMENT PLAN FOR THE INSURANCE PRACTITIONER APPRENTICESHIP

ST0240/V2

APPRENTICESHIP REFERENCE NUMBER	LEVEL OF THIS APPRENTICESHIP	INTEGRATION
ST0240	3	None

Assessment Plan

Assessment details

Introduction

This Apprenticeship Assessment Plan (AAP) sets out the requirements for the assessment of the Level 3 insurance practitioner apprenticeship. It should be read in conjunction with the General Requirements for Apprenticeship Assessment. Where there is conflict between this AAP and the General Requirements, this AAP takes precedence. Assessment organisations must also comply with the relevant regulatory framework for apprenticeship assessment.

It is important that the assessment of apprentices is proportionate, valid, and provides reliable evidence of an apprentice's attainment of the relevant knowledge and skills. As such, assessment organisations must design assessments to ensure:

- employers have confidence that the apprentice has reached the expected performance standard
- apprentices are sufficiently secure in their knowledge and skills, so that they could demonstrate their competence in different contexts (for example, a different workplace)

Assessment Outcomes

The assessment outcomes group and summarise the knowledge and skills that must be demonstrated in assessments. All assessment outcomes must be assessed.

Assessment organisations must ensure all the core assessment outcomes and the assessment outcomes for one of the following options are assessed for each apprentice:

- Option 1: Claims handler/Loss adjuster
- Option 2: Assistant underwriter
- Option 3: Junior broker

The assessment outcomes have been created to summarise the content that is not fully assessed by the qualifications mandated in the occupational standard. The knowledge and skills statements that are not mapped here are assessed by the qualifications mandated in the occupational standard.

Knowledge and skills statements in **bold** are mandatory and must be assessed in every version of the assessment that is made available.

Core Assessment Outcome	Mapping
<p>AO1: Organisational contribution and work prioritisation</p> <p>Uses understanding of the organisation's commercial aims to deliver required business outcomes within their insurance responsibility, managing workload and competing priorities to meet expectations.</p>	<p>K1</p> <p>S1, S9</p>
<p>AO2: Insurance case management and decision processes</p> <p>Identifies, analyses and verifies information to make evidence-based decisions, recommendations or referrals, applying organisational procedures and acting within authority limits to progress insurance activities compliantly.</p>	<p>K3*</p> <p>S2*, S3*, S4, S7</p>
<p>AO3: Stakeholder engagement and professional communication</p> <p>Engages with internal and external stakeholders using appropriate communication methods, building productive relationships and networks to progress insurance casework and support team objectives.</p>	<p>K4*</p> <p>S5*, S8*, S11*, S18*</p>
<p>AO4: Information and data management practices</p> <p>Applies principles of data integrity by securely recording, verifying, maintaining and sharing information using organisational IT systems to support insurance operations.</p>	<p>K5, K7*</p> <p>S6*</p>
Option 1: Claims handler/Loss adjuster	Mapping
<p>AO5: Claims assessment and settlement activities</p> <p>Identifies potential claims fraud, takes appropriate preventative action, and manages claims and/or payments within organisational policies, procedures and authority limits.</p>	<p>S10*, S12*</p>
Option 2: Assistant underwriter	Mapping
<p>AO6: Risk assessment and underwriting decisions</p> <p>Identifies and evaluates insurance risks and makes or recommends underwriting and premium decisions in</p>	<p>S13*, S16*</p>

line with organisational guidelines and authority levels.	
Option 3: Junior broker	Mapping
AO7: Broking and client placement activities	S14*, S15*, S17*
Gathers and interprets relevant client and market information to match needs with suitable insurance products, positioning cases with insurers to optimise potential return within the scope of the role.	

(*) Knowledge and skills statements which offer opportunities to develop functional English and maths are identified with an asterisk.

Assessment requirements

Assessment organisations must set apprenticeship assessments. Assessment organisations should consider how technology and digital tools can support innovation and efficiency.

Assessment organisations must design apprenticeship assessments to include at least one **professional discussion**.

Any additional assessment(s) must be selected from the following list of methods to ensure the assessment outcomes are met in full:

- **portfolio**
- **case study**
- **multiple-choice test**
- **presentation**
- **report**
- **question and answer**

Apprentices may be assessed at any appropriate point during their apprenticeship programme.

Assessments may be designed to allow a centre or training provider to mark assessments. The assessment organisation is responsible for ensuring all assessments are sufficiently reliable and valid, and for the accuracy of any centre or training provider marking.

Performance descriptors

Performance descriptors describe the level of performance required to achieve a pass or distinction grade. Assessment organisations must design assessments that align with these descriptions.

Performance Category	Pass	Distinction
Applied Knowledge	Demonstrates sound application of insurance knowledge, facts, procedures, and ideas across routine and non-routine tasks, completing them to an acceptable standard within familiar but sometimes complex work contexts.	Applies a thorough understanding of insurance knowledge, facts, procedures, and ideas to manage and resolve routine and non-routine tasks with discernment and skill in familiar but sometimes complex work contexts.
Applied Skills	Identifies and applies appropriate insurance skills, methods, and procedures to complete tasks and address challenges with a reasonable degree of autonomy and effectiveness across routine and non-routine activities.	Selects and integrates appropriate insurance skills, methods, and procedures proactively and resourcefully to complete tasks and address challenges effectively and with minimal oversight across routine and non-routine activities.
Regulatory and Procedural Awareness	Applies relevant insurance legislation, regulation, and organisational procedures without error, demonstrating some depth of insight and adaptability in familiar but sometimes complex work contexts.	Demonstrates refined judgement in interpreting relevant insurance legislation, regulation, and organisational procedures, confidently navigating nuanced issues in familiar but sometimes complex work contexts.
Communication and Collaboration	Participates effectively in team environments, using appropriate communication to support insurance service delivery and maintain productive	Communicates persuasively and adapts confidently to different audiences and team dynamics, taking initiative in delivering insurance service

	working relationships in familiar but sometimes complex work contexts.	interactions and supporting productive team outcomes.
Information Use and Decision Making	Accurately interprets and evaluates relevant insurance information from a variety of sources to support problem-solving in mostly familiar but sometimes complex work contexts.	Evaluates diverse and sometimes conflicting insurance information sources with insight, drawing informed conclusions that improve task outcomes or efficiency in familiar but sometimes complex work contexts.
Responsibility and Autonomy	Takes responsibility for initiating and completing insurance tasks within set parameters and, where relevant, contributes to guiding or supporting others in familiar but sometimes complex work contexts.	Pre-empts the need for insurance tasks to be initiated within set parameters, demonstrating accountability and responsiveness to emerging priorities or risks, and leading others to achieve team outcomes in familiar but sometimes complex work contexts.

Professional recognition

This apprenticeship aligns with the professional body recognition detailed in the occupational standard.

Please contact the relevant professional body for further information.

Additional qualification

One of the qualifications detailed in the occupational standard must be completed before the end of the apprenticeship.

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