



Certificate in IT for Insurance Professionals

Promoting understanding of IT in insurance practice

2010



CII

Certificate in IT for Insurance Professionals

Information Technology is an important part of every business. The insurance industry is especially reliant on computer systems to provide the level of service expected by customers and demanded by the marketplace.

It is essential that everyone in this industry who uses IT has a sound knowledge and understanding of the wider technical and business issues.

Overview

The Certificate in IT for Insurance Professionals is the only qualification designed specifically to cover IT issues and responsibilities in the insurance industry. Developed jointly by The Chartered Insurance Institute (CII) and BCS, The Chartered Institute for IT, it provides evidence of a broad understanding of the principles and use of IT in insurance, independent of any particular software or hardware platform.



Who is it for?

This certificate has significant benefits for everyone who needs to be aware of potential IT applications in the insurance industry. It will be particularly relevant if you have no formal IT qualifications and you:

- are an IT user looking to expand your knowledge and understanding;
- have management responsibility for IT, including purchasing;
- provide IT assistance to colleagues;
- are increasingly involved in IT during your day-to-day work.

What are the benefits?

The Certificate in IT for Insurance Professionals:

- demonstrates a broad understanding of IT;
- is specific to the insurance industry;
- has been developed by professionals for professionals;
- is a progressive step in your career development;
- is an Advanced Diploma unit worth 30 credits in the CII's insurance qualifications framework, and gives credit towards attaining BCS Higher Education Qualifications.

How is the exam structured?

The exam is written and is 3 hours in duration.

The paper is set in three parts:

- Technical aspects of IT (short questions);
- Management of IT (longer, application questions);
- Application of IT in insurance (based upon a case study).

The Certificate is awarded jointly by the CII and BCS.

Who can enter?

The exam is open to everyone. There are no formal entry requirements but you will be expected to draw upon your practical knowledge and experience of IT in insurance.

How can I study?

The CII and BCS offer full support to help you study for this qualification and give you the best possible chance of exam success. We strongly recommend that you study the syllabus, to ensure that you cover all the necessary aspects in your studies. For all enquiries relating to course material, please contact the CII.

The examiners recommend that you devote 120 hours' study to this exam.

A distance learning study text has been prepared to help you understand and master the unit. This is available with a year's update service, providing you with all updated material for a full 12 months after enrolment.

Price: £120 for CII/BCS members*
£136 for non-members

An update service beyond year 1 is also available.

Price: £49 for CII/BCS members*
£63 for non-members

Revision days – held in the weeks immediately before each exam, these enable you to:

- clarify areas of concern in the syllabus;
- discover what the examiner is looking for;
- discuss the common mistakes made by candidates and how to avoid them;
- learn useful revision and exam techniques.

Price: £250 CII/BCS members*
£290 non-members

Venue: London

Dates: 22 March, 08 April,
07 September, 21 September

All prices quoted are valid from 01 January 2010 to 31 December 2010.

*Details of CII and BCS membership are available from the respective bodies, or their websites www.cii.co.uk/membership and www.bcs.org/membership

Accreditation of prior learning (apl)

If you have undertaken prior learning that you believe is the equivalent of CITIP you may be able to claim recognition in the form of credits that can be used towards completion of CII qualifications. To apply, please complete and submit the Accreditation of Prior Learning form at www.cii.co.uk/accreditation





To enter the exam

Please complete the enclosed entry form and send it with your payment to the CII. If applying for an examination only, please send your application directly to BCS.

Exam fee: £112 for CII/BCS members*
£149 for non-members

Closing date for exam entries

April 2010 examination sitting
Closing date: 10 March 2010

September 2010 examination sitting
Closing date: 01 September 2010

Non-standard venue closing dates

April 2010 examination sitting
Closing date: 15 January 2010

September 2010 examination sitting
Closing date: 15 August 2010

Late or incomplete exam entries will not normally be accepted. In exceptional circumstances, a fee may be charged for processing such entries.

Once your entry has been processed, we will send you your admission letter and address/starting time of the examination at your chosen venue.

Sitting the exam

The exam will be held on 23 April 2010 and 30 September 2010 at the venues listed on the entry form.

You must take your admission letter and formal identification bearing your signature and recent photograph with you to the exam venue.

In exceptional circumstances and at the discretion of the Head of BCS Higher Education Qualifications, a candidate may change venue but a fee of £30 will be levied.

Non-standard venues

This applies to candidates who live outside the UK. If you wish to sit the exam in a country not on the international venues list (see entry form), please write clearly your preferred venue (by country and city) on the entry form. For an additional exam venue surcharge of £50 we will normally be able to set up the venue of your choice. However, please note that we usually only set up one venue per country. That venue is likely to be the capital city or major city as we generally use a British Council or CII approved centre. In the unlikely event that we are unable to get the preferred venue in the country of your choice, we will notify you.

Calculators

Calculators are not allowed in this examination.

Results

Results and certificates will be dispatched by August for the April sitting, whilst candidates sitting in September will be issued their results and certificates in December. Please note there is no need to contact the BCS/CII with your exam results as these will automatically be added to your records (please allow 14 days, from the issue of your results, for your CII records to be updated). If on passing CITIP you should complete a CII qualification, you will automatically be sent the relevant notification.

Mitigating circumstances

If you believe you have mitigating circumstances with regard to your exam performance, you must write to the Head of BCS Higher Education Qualifications, explaining the circumstances, within three weeks of the exam. Supporting evidence must be provided in all cases.

Refunds and withdrawals

Entry fees will not be refunded after the statutory period of cancellation has expired. See 'Your right to cancel' on the back of the entry form. If you wish to transfer your fees to the next examination sitting then please contact BCS. Supporting documents (i.e. medical certificate) must be provided in all cases to the Head of BCS Higher Education Qualifications. All applications must be made within three weeks of the exam. Non-standard venue fees will not be transferred under any circumstances.

Appeals

BCS operates an appeals system. Details are available from the Head of BCS Higher Education Qualifications on written request.

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Exam Syllabus April & September 2010

Objective

To develop knowledge and understanding of the technical aspects of information technology, the management of information technology and its application in insurance. To be able to evaluate and apply this knowledge and understanding in the insurance domain.

Assumed knowledge

It is assumed that the candidate already has sufficient background knowledge of risk and the insurance market to be able to apply information technology effectively in that context.

Section A

Technical aspects of information technology

Computing fundamentals

Development of computing.

Bits, bytes, records, files.

Character representation and sets.

Types and characteristics of computers.

Characteristics of a mainframe computer system.

Physical environment requirements for mainframe computers.

Different types of user interface.

Multimedia.

Computer hardware

CPUs and motherboards

- silicon chips;
- meaning and operational implications of clocking speed in MHz.

Memory and storage: RAM, ROM and effect on computer performance.

Video and sound cards.

Output devices

- printers: different types;
- monitors: sizes, methods of achieving pictures/graphics (pixels, resolution); accelerator cards.

Storage devices

- formatting;
- cartridges;
- removable disks;
- CD ROM / DVD.

Input devices

- keyboard (standard and ergonomic), mouse, touch screen, voice, scanner, joystick, webcam, digital camera.

Software

Operating systems: what are they, development of OS

- Anti-virus software;
- Utility software.

Programming languages

- 3GLS, 4GLS, visual, query, object-oriented.

Characteristics and practical application of packaged software applications

- word processing: letters, reports, presentation of information;
- spreadsheets: calculation of data and presentation of management information;
- databases: collection and analysis of all forms of data using flat, hierarchical and relational types;
- graphics and desktop publishing: graphical presentation of data, production and presentation of brochures, leaflets and illustrations;
- workflow;
- document information management and image processing;
- expert systems: to understand and forecast outcomes;
- computer based training;
- diary/notebook;
- voice recognition;
- foreign language translation;
- integration and compatibility of different applications, especially office systems;
- Groupware.

Telecommunications and networking

Types of lines: analogue and digital; e.g. ISDN, DASS, ADSL.

Bandwidth, baud and other definitions.

Types of network, capabilities and differences

- point-to-point (peer-to-peer), server-client;
- LAN (Ethernet, token ring, ATM);
- WAN.

Network devices

- PCs, mainframes, printers, photocopiers;
- types of server: data, file, gateway.

Data communications equipment: PABX, modems, routers, controllers.

Internal networking for connection and control of PCs on an agreed form of network.

External networking from central base to outside local PCs.

Intranet: characteristics of design and application, security issues.

Extranet.

Internet and World Wide Web: characteristics and security aspects; server and client components.

Computer Telephony Integration (CTI).

Video conferencing: advantages and disadvantages.

Satellite telecommunications.

Mobile phone technologies, e.g. GPRS.

Wireless communications, e.g. WiFi.

Section B

Management of information technology

Management considerations of IT in an organisation

Techniques for IT strategy and planning

- evaluation of computer systems, their updating, costs and benefits;
- departmental and external IT support;
- IS investment appraisal and justification.

Outsourcing

- main features of in-house and outsourced IT services;
- advantages and disadvantages of each;
- basis for selection.

Differences in capabilities of mainframe and PC systems

- advantages and disadvantages of each;
- basis for selection;
- transfer of individual/group data onto PCs/terminals for read-only purposes, or further PC processing.

Package solutions versus bespoke software

- main features of each;
- advantages and disadvantages of each;
- basis for selecting appropriate solutions, including role of software houses.

Project management and legal issues

- project management programmes to meet agreed timescales; control and

- scheduling of work;
- system development: business analysis, systems design, programming, testing, implementation;
- training methods for different applications;
- techniques for system monitoring and evaluation;
- use of modelling techniques to develop IT systems to meet specific organisational needs;
- Health and Safety at Work Act 1974 etc, IT implications for managers: power supplies, cables, repetitive strain injury, screen glare, bad posture;
- Disability Discrimination Act.

Data management and storage

Management of databases.

Distributed and centralised data: advantages and disadvantages of each.

Security of data: backups (regularity, types of backup media); Viruses.

Integrity of data, e.g. check digits.

Privacy and confidentiality of data: access control (passwords, voice and handprints); read only PCs/terminals; encryption.

Transfer of data between computers.

Compliance with Data Protection Act 1998; Computer Misuse Act 1990; Copyright, Designs and Patents Act 1988; Federation Against Software Theft.

Challenges presented by legacy systems.

Implications of increased power and storage.

Data warehousing and data mining.

End user computing, description, use, advantages, disadvantages, management and security issues.

Preference services – telephone, fax and mail. Description of preference services, their use and their impact on call centres and mailing houses.

Section C

Application of information technology in insurance

Insurance applications

The development of IT's contribution to the effectiveness of insurance operations, including issue of documents at source, in respect of

- claims handling;
- premium generation and collection;
- quotations;
- placement and new business;
- policy generation;
- Customer Relationship Management (CRM);
- renewals;
- sales, marketing and promotion;
- operational management information;
- statistical analysis;
- strategic management information;
- company mergers and acquisitions (conversion).

Accounts: individual packages and commercial accounting packages.

Use of IT in technical and product training.

Significance of IT to the development of direct insurance.

Mobile technology and its use in insurance.

Use of workflow software.

Electronic commerce

E-mail: visual distribution of texts, messages, voice and images.

E-mail etiquette.

XML characteristics, advantages and disadvantages.

Mobile telephony and computing, including point of sale technology, WAP phones, digital TV.

Teleworking.

Call centres.

Electronic placement systems.

Information providers, e.g. CUE, DVLA, postcode providers.

Opportunities and threats of electronic commerce, including direct sales via the Internet.

Application of CTI.

Channel strategy: how businesses transacting insurance are using IT to provide alternative channels for customers.

Computer projects: how projects are justified; tangible and intangible benefits, calculation of RoR, NPV.

Reading list

CII coursebook, published by The CII, London

E-commerce in insurance. Martyn Allez. London: CII Knowledge Services. Updated as necessary. Available online at www.cii.co.uk/knowledge/factfiles (CII/Personal Finance Society members only).

Reference material

A Manager's Guide to IT Law. Edited by Jeremy Holt, Jeremy Newton. London: British Computer Society, 2004.

Computers: Tools for an Information

Age. H L Capron, J A Johnson. 8th ed, International ed. Upper Saddle River, New Jersey: Pearson Education International, 2004.

Information Systems Management in Practice. Barbara C McNurlin, Ralph H Sprague Jr. 7th ed, International ed. Upper Saddle River, New Jersey: Pearson Education, 2005.

Insurance Practice. G C A Dickson, W M Stein. London: The CII. Looseleaf, updated.

Kluwer's Handbook of Insurance. Kingston upon Thames, Surrey. Croner. CCH. Looseleaf, updated.

Periodicals

ITNOW. BCS membership magazine. **Six issues a year**. Also available online at www.bcs.org/itnow

Computer Weekly. London: Reed Business Information.

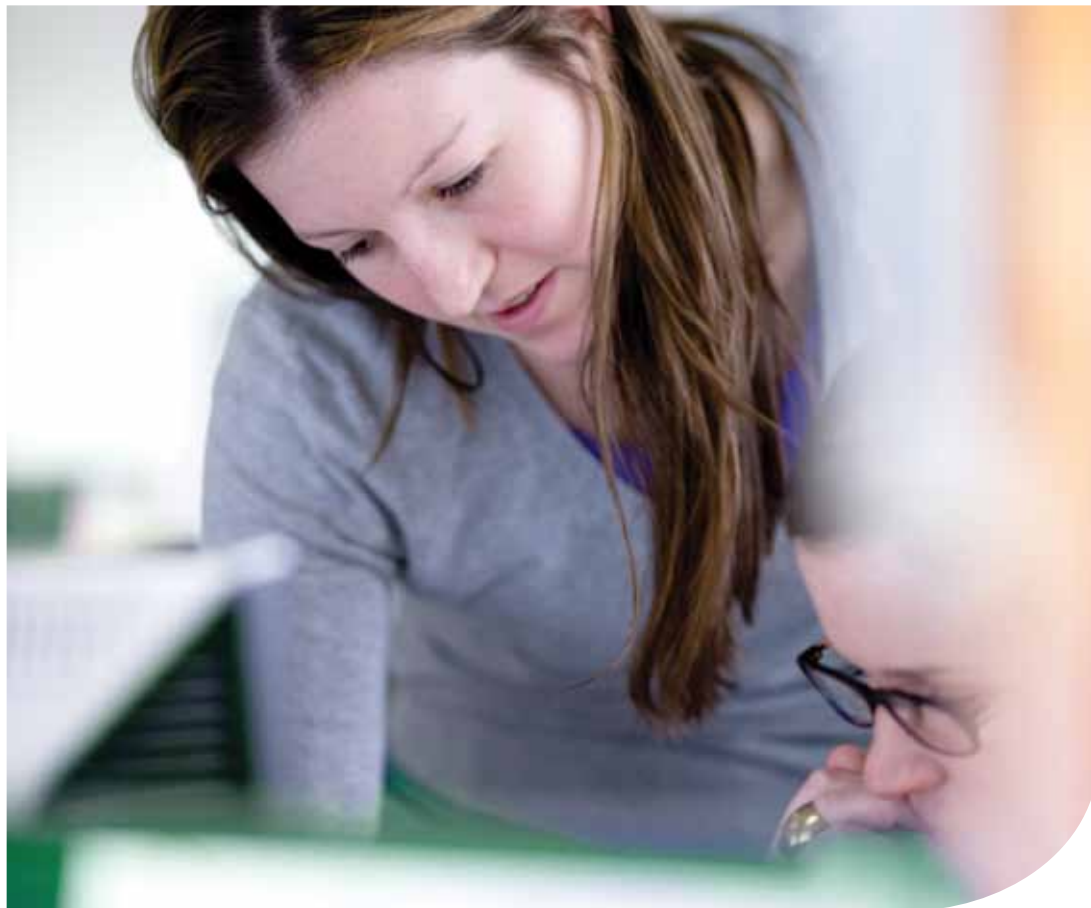
Computing. London: VNU. **Weekly**.

The Journal. London: The CII. **Six issues a year**. Also available online (CII/Personal Finance Society members only) at www.cii.co.uk/knowledge/journal

Websites

BCS – www.bcs.org/heq

CII Knowledge Services – www.cii.co.uk/knowledge



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