

Specification of Competency Standards of the Insurance Industry

Unit of Competency

Functional Area: Operational Support & Services

Title	Maintain staff personal files
Code	105472L2
Range	This unit of competency is applicable to those who are carrying out daily operations. It involves maintenance of up-to-date staff records to support day-to-day functions.
Level	2
Credit	2 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none">1. Possess knowledge in customer record management<ul style="list-style-type: none">• Know how to operate a HR computerized system• Understand the compliance requirements, e.g. Personal Data (Privacy) Ordinance, on data management2. Manage customer records<ul style="list-style-type: none">• Update and document staff data• Provide relevant staff statistics upon requests3. Comply with regulatory requirements and code of practice to handle and maintain HR records<ul style="list-style-type: none">• Maintain up-to-date staff data• Handle staff records in accordance with regulatory requirements.
Assessment Criteria	<p>The integrated outcome requirements of this unit of competency are:</p> <ul style="list-style-type: none">• Able to update and document staff personal records timely and accurately;• Able to comply with regulatory requirements and code of practice to handle and maintain staff records.
Remark	The unit of competency is applicable to general insurance, life insurers and brokers.