



BCONSULT

Occupational Certificate

HEALTH CARE BENEFITS ADVISOR

NQF Level 5 | SAQA ID 105030 | 102 Points | 12 Months

Health Care Benefits Advisor – NQF Level 5

SAQA ID: 105030 | Credits: 102 | Duration: 12-month | QCTO Learnership

1. Course Overview

The Occupational Certificate: Health Care Benefits Advisor is designed to equip learners with the knowledge, practical skills, and workplace experience required to provide professional advice on the selection and use of healthcare benefit products and structures.

This qualification responds to the growing need for competent professionals in the financial and healthcare benefits sector, supporting the objectives of the National Development Plan through job creation, improved financial literacy, and social wellbeing.

As a part-qualification within the Financial Advisor suite, it lays the foundation for learners to progress into specialised or advanced advisory roles within the insurance and financial services industry.

2. Learning Outcomes

On successful completion, learners will be able to:

- Explain and apply regulatory requirements relevant to healthcare benefit advisory services.
- Analyse client needs and assess suitable healthcare benefit solutions.
- Provide professional advice on healthcare benefit programmes, ensuring compliance and full disclosure.
- Maintain accurate records of client interactions, advice given, and actions taken in accordance with legal requirements.
- Contribute effectively to the implementation of healthcare benefit programmes within an organisation.

3. A Qualified Learner Will Be Able To:

- Provide comprehensive advice regarding the use, selection, and management of healthcare benefit programmes.
- Demonstrate compliance with applicable regulatory frameworks and industry standards.
- Identify the implications of non-compliance on clients, organisations, and representatives.
- Gather, capture, and analyse client data to identify real needs and recommend appropriate solutions.
- Prepare and communicate recommendations to clients, ensuring clarity, transparency, and professional integrity.

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Entry Requirements

- A **National Senior Certificate (NQF Level 4)** or equivalent qualification with Communication as a foundational competency.
- Recognition of Prior Learning (RPL) may be applied for learners who meet the outcomes of the access requirements through workplace experience or prior study.

4. International Comparability

The Occupational Certificate: Health Care Benefits Advisor aligns closely with comparable international programmes, including:

- **Ireland:** Professional Certificate in Insurance (Accredited Product Adviser – APA) offered by The Insurance Institute, covering compliance, healthcare insurances, and client advisory services.
- **Australia:** FNS51215 Diploma of Insurance Broking, preparing learners for professional advisory roles in risk and insurance management.

The South African qualification compares favourably in terms of purpose, level, and duration, reflecting global standards for healthcare benefits advisory training.

5. Occupational Trainer – NQF Level 5 Certification

This qualification is registered on the **Occupational Qualifications Sub-Framework (OQSF)** at **NQF Level 5**.

It forms part of the **Occupational Certificate: Financial Advisor (NQF Level 6)** and serves as a pathway for progression to higher-level financial advisory qualifications.

6. Potential Career Opportunities

Graduates of this qualification can pursue roles such as:

- Health Care Benefits Advisor
- Medical Scheme Consultant
- Employee Benefits Specialist (Healthcare focus)
- Financial Services Consultant (Healthcare Products)
- Client Relationship Officer – Health Benefits

With further study and workplace experience, learners may progress to roles such as Investment Advisor or Financial Advisor (NQF Level 6).

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7. Learning Options

Accredited skills development providers offer this qualification through:

- **Classroom-based learning** with practical workshops.
- **Blended learning**, combining face-to-face instruction, online modules, and self-study resources.
- **Workplace-based experiential learning**, allowing learners to apply theory in real advisory environments.

Learners must complete all knowledge, practical skills, and work experience modules and successfully undergo an external Integrated Summative Assessment conducted by the QCTO's Assessment Quality Partner (INSETA).

Contact Details

Email

sales@bconsult.co.za
info@bconsult.co.za

Phone

+27 31 536 8167
+27 87 222 7137
+27 31 536 8467

Johannesburg: 32 Lucas Ln Bedfordview, Germiston, 2008
Durban: 28-32 Siphosethu Rd, Mt EdgeCombe, Kingfisher Office Park

Cape Town: Unit 63 & 64 Millenium Office Park, 19 Edison Way, Century City, Milnerton

www.bconsult.co.za