Construct and ticket a non-air travel plan

D2.TTA.CL2.05

Assessor Manual

Australian Aid
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William Angliss Institute
Specialist centre for foods, tourism & hospitality

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Project Base

William Angliss Institute of TAFE
555 La Trobe Street
Melbourne 3000 Victoria

Telephone:	(03) 9606 2111
Facsimile:	(03) 9670 1330

Acknowledgements

Project Director:	Wayne Crosbie
Project Manager	Jim Irwin
Chief Writer:	Alan Hickman
Subject Writer:	Nick Hyland
Editor:	Jim Irwin
DTP/Production:	Daniel Chee, Mai Vu, Cindy Curran

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Competency Based Assessment (CBA) – An Introduction for Assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

Suggested Assessment Methods

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

Alternative Assessment Methods

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

a) The nature of the unit
b) The strengths of participants
c) The number of participants in the class
d) Time required to complete assessments
e) Time dedicated to assessment
f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes

- Case studies
- Log books
- Projects and Role plays
- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the ‘Other’ section within the ‘Competency Recording Sheet’.

Selection of Assessment Methods

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

‘Sufficient’ evidence to support the ‘Pass Competent’/’Not Yet Competent’ decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

Assessing Competency

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- ‘Pass Competent’ (PC)
- ‘Not Yet Competent’ (NYC).

Pass Competent (PC)

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as ‘Pass Competent’ (PC).

The assessor will award a ‘Pass Competent’ (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

Not Yet Competent’ (NYC)

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be ‘Not Yet Competent’ (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

a) Undertake further training or instruction

b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

Regional Qualifications Framework and Skills Recognition System

The 'Regional Qualifications Framework and Skills Recognition System', also known as the 'RQFSRS' is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework
- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the 'RQFSRS' is to provide, ensure and maintain 'quality assurance' across all countries and educational providers across the ASEAN region.

Recognition of Prior Learning (RPL)

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

Code of Practice for Assessors

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them
- Candidates with assurance of the standards of practice expected of assessors
- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity
- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary
- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes

- The rights of the candidate are protected during and after the assessment
- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes
- The candidate is made aware of rights and process of appeal
- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency
- Assessment decisions are based on available evidence that can be produced and verified by another assessor
- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

Instructions and Checklist for Assessors

Instructions

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate
- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions
- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time
- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status
- Complete the relevant documentation and submit to the appropriate department.

Preparation

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected
- Study details assessment documentation and requirements
- Brief candidate regarding all assessment criteria and requirements.

Briefing Checklist

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.

Checklist for Assessors

Prior to the assessment I have:	**Tick (✓)**	**Remarks**
Ensured the candidate is informed about the venue and schedule of assessment.		
Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP).		
Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process.		
Identified and accommodated any special needs of the candidate.		
Checked the set-up and resources for the assessment.		
During the assessment I have:		
Introduced myself and confirmed identities of candidates.		
Put candidates at ease by being friendly and helpful.		
Explained to candidates the purpose, context and benefits of the assessment.		
Ensured candidates understood the assessment process and all attendant procedures.		
Provided candidates with an overview of performance criteria to be assessed.		
Explained the results reporting procedure.		
Encouraged candidates to seek clarifications if in doubt.		
Asked candidates for feedback on the assessment.		
Explained legal, safety and ethical issues, if applicable.		
After the assessment I have:		
Ensured candidate is given constructive feedback.		
Completed and signed the assessment record.		
Thanked candidate for participating in the assessment.		

Instructions for Recording Competency

Specifications for Recording Competency

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate
- This Competency Recording Sheet is located at the end of the Assessment Plan
- It is the overriding document to record competency
- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs
- Assessor must place a tick (✓) in the 'Assessment Method' columns to identify the methods of assessment to be used for each candidate
- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate
- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed
- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings
- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

Instructions for Different Assessment Methods

Specifications for Work Project Assessment

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected
- Prepare sufficient resources for the completion of work activities including:
  - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours
  - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents
- Prepare assessment location (if done in class) making it conducive to assessment
- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place

- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):

  "At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.

  These work projects are part of the formal assessment for the unit of competency titled X:

  - You are required to complete these activities:
    a) *Using the 'X' method of assessment*
    b) *At 'X' location*
    c) *You will have 'X time period' for this assessment*
  - You are required to compile information in a format that you feel is appropriate to the assessment
  - Do you have any questions about this assessment?"
- Commence Work Project assessment:
  - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
  - Participants complete work projects in the most appropriate format
  - Participants must submit Work Project evidence to the assessor before the scheduled due date
- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
  - Enter Student name
  - Enter Assessor name
  - Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment
- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These oral questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.

We have 60 minutes for this assessment.

  - I will give you feedback at the end of the assessment
  - Do you have any questions about this assessment?"

- Commence Oral Questioning assessment:
  - Complete Assessment Record for the Oral Questioning by:
    a) Ticking PC or NYC, as appropriate
    b) Entering 'Remarks' as required
    c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided
- Print and distribute copies of 'Written Questions' for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date
- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These written questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability.

  You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

  Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

  We have X time for this assessment:

  - The due date for completion of this assessment is X
  - On this date you must forward the completed questions to the assessor by X time on the date of X
  - Do you have any questions about this assessment?"
- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date

- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Observation Checklist

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate
- Insert assessor name
- Insert identify of location where observations are being undertaken
- Insert date/s of observations – may be single date or multiple dates
- Place a tick in either the 'Yes' or 'No' box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill
- Provide written (and verbal) feedback to candidate – as/if appropriate
- Sign and date the form
- Present form to candidate for them to sign and date
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the participant.

Specifications for Third Party Statement

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

- Insert candidate name
- Insert name and contact details of the Third Party
- Tick the box to indicate the relationship of the Third Party to the candidate
- Present the partially completed form to the Third Party for them to finalise
- Collect the completed form from the Third Party
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Third Party Statement.

The Third Party must:

- Record their belief regarding candidate ability/competency as either:
  - Pass Competent = Yes
  - Not Yet Competent = No
  - Unsure about whether candidate is competent or not = Not Sure
- Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the ‘Pass Competent’ or ‘Not Yet Competent’ decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.

Competency standard

UNIT TITLE: CONSTRUCT AND TICKET A NON-AIR TRAVEL PLAN	**NOMINAL HOURS:** 50
UNIT NUMBER: D2.TTA.CL2.05	
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to process client requirements to provide tickets and produce an itinerary for travel that does not include air travel.	
ELEMENTS AND PERFORMANCE CRITERIA	**UNIT VARIABLE AND ASSESSMENT GUIDE**
Element 1: Confirm client information and requirements for travel **1.1** Capture and/or confirm *client details* **1.2** Confirm *existing arrangements* relating to the travel plan **1.3** Identify and confirm *needs and preferences of client* **1.4** Identify and access *appropriate resources and sources of information* to enable processing of client requirements **1.5** Identify *booking deadlines* **Element 2: Process travel plan requirements** **2.1** Select carriers and suppliers to accommodate identified client requirements **3.1** Up-date *internal records*	**Unit Variables** The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. This unit applies to organisations that are involved in the monitoring of staff performance within the labour divisions of the hotel and travel industries and may include: 1. Front Office 2. Housekeeping 3. Food and Beverage Service 4. Food Production 5. Travel Agencies 6. Tour Operation *Client details* refers to: • Name • Age

2.2 Construct *costed draft itinerary* in accordance with host enterprise *operational requirements* and identified client requirements **2.3** Obtain approval and *authority to proceed* with *booking/s* from client **2.4** *Book approved itinerary* with nominated carriers and suppliers **2.5** Obtain *payment from client*, as required **Element 3: Process travel documentation and payment** **3.2** *Prepare required travel documentation* to support approved client booking **3.3** *Process payment/s by client* **3.4** *Issue travel documentation* **3.5** *Pay supplier*	• Home and/or business address, including postal and street • Address for payment and delivery of documents • Contact details • Agent details, where applicable • Times when client is available and/or unavailable • Preferred contact times of the day • Associated groups or other bodies client is a member of or connected to for purposes of determining relevant preferential treatment and/or discounts • Previous client history, including information on system databases and client management systems. *Existing arrangements* may include: • Existing reservation data • Products and/or services already sold or confirmed as part of the current travel plan • Identification of confirmed bookings held for client for current travel plan • Confirmation of quotations supplied to client for products and services • Finalisation of outstanding issues and financial matters with clients. *Needs and preferences of client* may relate to: • Packages • Personalised travel plans • Budget limitations • Timing and duration • Number of travellers, including considerations applicable to groups, families and individuals

	• Destinations
	• Preferred carriers and suppliers, including preferences for:
	  ▪ Methods of travel, including car rental, coaches, trains and other options unique to individual destinations, countries and locations
	  ▪ Type and style of accommodation
	  ▪ Attractions, sight-seeing trips and events
	• Quotations and advice previously supplied to client
	• Existing arrangements for the travel plan that have already been finalised, including arrangements made by the client and arrangements made by the host enterprise or other agencies.
	
	Appropriate resources and sources of information may include:
	• Computerised reservation system, including computerised data/information contained within the system
	• Carrier, provider and visa guides
	• Schedules/timetables
	• Fare and tariff manuals, including contracts and agreements with suppliers
	• Brochures
	• Information kits
	• Catalogues and price lists
	• Personal knowledge and experience
	• Internal business sources, including undertaking basic research using databases and reservation systems either manual or computerised
	• Direct contact with:
	  ▪ Travel suppliers, including cruise operators, railway operators, bus lines, car rental businesses, limousine hire, taxis

	▪ Suppliers and providers of support and ancillary services, including travel insurance providers, finance providers, currency exchange, conference and similar venues, interpreters ▪ Tour operators and wholesalers ▪ Travel agencies and associations ▪ Peak travel bodies ▪ Government tourism industry bodies and authorities, including domestic and international bodies • Literature, including reference books, magazines and newspapers • Websites, including individual companies, directories, news sites, surveys and research sites • Personal network of contacts, including those within the host enterprise and those external to the business. *Booking deadlines* refers to: • Carrier guidelines • Advance notice timelines required by carriers and suppliers • Client needs • Relationship between cost and advanced booking dates/timelines. *Costed draft itinerary* relates to: • Name and number of travellers and/or passenger/s, including indication of adults and children, where applicable • Day and date of travel • From and to destinations • Name of carrier and identification of chosen option, including seat allocation, where applicable

	• Departure and arrival times • Fare, taxes, fees and charges, including sub-totals and total using basic calculations • Deposit and/or full payments required, if applicable • Verification of connections and times, where applicable. *Operational requirements* relates to: • Carrier and supplier guidelines • Regulatory requirements • Host enterprise requirements • Peak body requirements and procedures, where applicable, including fare construction rules, if applicable • Use of correct documentation and/or computer screens and system information fields. *Authority to proceed* may include: • Verbal notification from client • Signed authority on standard organisational form • Explanation of relevant terms and conditions that attach to bookings. *Booking/s* may include: • A single product and/or service • Multiple products and/or services comprising a complete itinerary • Individuals and groups • Guests and delegates • One-off touring arrangements • Series tours

	• Incentive tours
	• Meetings and conferences
	• Payment of deposit or full payment for products and services.
	
	Book approved itinerary may include:
	• Placing requests with carriers and suppliers
	• Obtaining confirmation of bookings
	• Operating computerised reservation systems
	• Seeking and booking through alternative carriers and suppliers where initially selected carriers and suppliers are unable to accommodate requests/bookings.
	
	Payment from client may include:
	• Credit card
	• Cash, personal, business or traveller's cheque
	• Direct debit, such as electronic funds transfer
	• Invoice/account
	• Telephone payment
	• E-mail, or other electronic transmission
	• Payment of deposits and full payment for itinerary.
	
	Prepare required travel documentation can relate to internal and external requirements and may include the following activities and documents:
	• Activities:
	  ▪ Ensuring accuracy of all entries and calculations
	  ▪ Verifying all charges and discounts involved

	▪ Completing documentation fully and in accordance with host enterprise operational requirements ▪ Ensuring timely completion of all required documents • Documents: ▪ Client and passenger itineraries ▪ Vouchers, including those for accommodation, cruise, tour, entries, vehicle, tourism products and services ▪ Confirmation vouchers and letters, including meeting and/or event confirmation letters, registrations and delegate information packs/kits ▪ Commission vouchers ▪ Travel insurance documentation ▪ Visa forms, passport forms and visas ▪ Tickets, including coach and other transportation options ▪ Requests for traveller’s cheques ▪ Briefing notes for crews and staff ▪ Rooming and passenger lists. *Process payment/s by client* may include: • Accepting payment based on standard host enterprise, industry or carrier/supplier requirements • Issuing receipt • Recording payment of deposit on internal documentation • Advising client of amount outstanding, where applicable.

	Issue of travel documentation will depend on booking type as well as host enterprise, carrier and supplier requirements and may include: • Issuing documentation to clients and passengers • Providing documentation to accounts department • Placing copies of documents in client file • Providing documentation to carriers and suppliers • Supplying documentation to operational staff, including tour leaders, tour guides, drivers • Providing documentation to relevant authorities and government bodies, as applicable. *Pay supplier* may include: • Taking into account monies already paid • Requesting payment from the accounts department, or self-administering payment • Conforming to approved or required methods of payment • Ensuring timeliness of payment • Completing relevant documentation • Adding appropriate notifications into client file and up-dating records as required • Factoring in commissions due to the host enterprise. *Internal records* may include: • Client files • Invoices • Receipts • Computerised system screens and fields • Adding confirmations and other responses from suppliers

	• Adding communications from client • Including documents and records relating to amendments and adjustments to initial request/booking • Up-dating financial status of client file • Receiving, processing and recording payments. **Assessment Guide** The following skills and knowledge must be assessed as part of this unit: • Ability to understand and comply with enterprise policies and procedures in regard to operational requirements for developing itineraries, costing fares, processing payments, issuing tickets and completing documentation and records • Ability to use basic research techniques • Ability to perform basic arithmetic calculations • Detailed knowledge of itinerary construction • Detailed knowledge of ticketing rules appropriate to the needs of the host enterprise • Ability to identify, access and apply travel-related resources • Ability to identify and interpret carrier and other travel codes • General knowledge of carrier and supplier regulations and requirements • Ability to convert currencies • Ability to process payments. **Linkages To Other Units** • Operate a computerised reservation system • Source and provide destination information and advice • Prepare and submit quotations

	• Access and retrieve computer-based data • Develop and update local knowledge • Use common business tools and technology • Develop and update tourism industry knowledge • Maintain product information inventory • Construct and apply tourism product research • Access and interpret product information • Book and co-ordinate supplier services. **Critical Aspects of Assessment** Evidence of the following is essential: • Understanding of organisational, carrier and supplier requirements in relation to travel plan construction and ticketing • Demonstrated ability to identify and confirm the arrangements that have already been made and the requirements that exist in relation to the development of a travel plan for a nominated client • Demonstrated ability to develop a costed draft itinerary that accommodates the identified needs of a client and receives their approval for proceeding with the booking • Demonstrated ability to book a nominated travel plan/itinerary and respond effectively to problems that arise during the booking process so that identified client need is met • Demonstrated ability to prepare and distribute necessary travel documentation to support the legal and effective undertaking of a nominated travel plan that meets identified client need • Demonstrated ability to process client payment/s and up-date internal records and client files to reflect such payment.

	Context of Assessment Assessment must ensure: • Actual or simulated workplace application of travel plan construction in a realistic office environment • Access to equipment and booking systems. **Resource Implications** Training and assessment must include actual computerised reservation and ancillary systems, real travel and product/service-related documentation or screens, real travel and product/service-related resource material and actual or simulated travel plans for use as the basis of developing itineraries and issuing tickets. **Assessment Methods** The following methods may be used to assess competency for this unit: • Observation of practical candidate performance • Portfolio of travel-related documentation and internal business records • Case studies • Simulated exercises • Role plays • Oral and written questions • Third party reports completed by a supervisor or customer • Project and assignment work.

	Key Competencies in this Unit *Level 1 = competence to undertake tasks effectively* *Level 2 = competence to manage tasks* *Level 3 = competence to use concepts for evaluating*		
	Key Competencies	**Level**	**Examples**
	Collecting, organising and analysing information	1	Gather product and services information and resources to enable processing of client travel plan
	Communicating ideas and information	1	Explain itineraries and supporting documentation to clients; explain client requirements to carriers
	Planning and organising activities	1	Arrange payments from client for itinerary; arrange payments to carriers and suppliers
	Working with others and in teams	1	Liaise with industry partners and other staff to access and identify relevant information as required by the client
	Using mathematical ideas and techniques	1	Calculate costs and payments
	Solving problems	1	Source alternatives for client that enable attainment of identified requirements
	Using technology	1	Research and access information via the Internet; use computerised reservation systems to communicate with carriers and suppliers

Oral questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Construct and ticket a non-air travel plan D2.TTA.CL2.05
Instructions	1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question.

Questions	**Response**	
	PC	**NYC**
1. What are examples of client information that may be collected?	❑	❑
2. Why is it important to confirm existing arrangements before asking clients for their travel arrangement needs?	❑	❑

Questions	Response	
	PC	NYC
3. What questions are normally contained within a quotation planner?	❑	❑
4. What information can be obtained through looking at the website for a travel organisation?	❑	❑
5. What is a booking deadline?	❑	❑

Questions	Response	
	PC	NYC
6. What are examples of attractions and theme parks in your region?	❑	❑
7. What are examples of financial information that needs to be updated in internal records?	❑	❑
8. What is the difference between a quotation and an itinerary?	❑	❑

Questions	Response	
	PC	NYC
9. Why is it important to obtain approval from the client before booking travel products and services?	❑	❑
10. What can you do if there is an inability to provide products and services as originally requested?	❑	❑
11. What is the purpose of a receipt? What information should be contained within a receipt?	❑	❑

Questions	Response	
	PC	NYC
12. Why is it important to check all documentation prior to issue?	❑	❑
13. What are reasons why you may have under-payments from clients?	❑	❑
14. What needs to be considered when dispatching travel related documents to clients?	❑	❑

Questions	Response	
	PC	NYC
15. What are considerations when scheduling payments to suppliers?	❑	❑

Written questions

Construct and ticket a non-air travel plan – D2.TTA.CL2.05

Student Name: ____

Answer all the following questions and submit to your Trainer.

1. What are the benefits of accurately recording information?

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____
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2. What are activities associated with creating client files?

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____
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3. What are types of existing arrangements that you may review before finalising customer needs?

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____
____

4. What are general non-air products and services sought by customers?

____
____
____
____

5. What are three types of customer needs and preferences when seeking travel arrangements?

6. Explain the process of identifying client requirements.

7. What are examples of internal resources that can be used to identify tourism product and services information?

8. What are three sources of general travel product and services information?

9. Why is it important to identify booking deadlines?

10. What are factors impacting booking deadlines?

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11. What are activities associated in identifying appropriate suppliers?

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12. What types of suppliers provide tourism product and services?

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13. What are types of internal records?

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14. What are reasons to update internal records?

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15. What are operational requirements to be considered when preparing quotations and itineraries?

16. What information is normally included in a quotation and itinerary?

17. What are examples of action that show a commitment that customers are ready to buy?

18. What are the types of authority received by customers allowing you to proceed with a booking of travel products and services?

19. What are two examples of organisational requirements that must be considered when forwarding requests to suppliers?

20. What are methods used to forward requests to suppliers?

21. What information would you like to get from suppliers to identify their responses to your request for travel products and services?

22. What are two methods of requesting confirmation of bookings?

23. What are types of payments that clients can make to pay for travel services?

24. What is the purpose of travel documents?

25. What are examples of travel documents and materials to be prepared?

26. What are activities associated with processing payments made by clients?

27. What are activities associated with issuing travel documentation?

28. What are host enterprise requirements to be considered when dispatching travel documents to customers?

29. What are activities associated with paying suppliers?

30. What are types of payments that can be made to suppliers?

Answers to written questions

Construct and ticket a non-air travel plan – D2.TTA.CL2.05

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

1. What are the benefits of accurately recording information?

- Review and prioritise in order of importance
- Second one of your colleagues to assist you
- Reset agreed deadlines with customers
- Bring your situation to the attention of your manager or supervisor.

2. What are activities associated with creating client files?

- Preparing paper-based or electronic file
- Establishing and naming file for individual clients
- Incorporating previous client history into file
- Allocating specific agent to handle and deal with client
- Initiating nominated client and file records as required by the host enterprise.

3. What are types of existing arrangements that you may review before finalising customer needs?

- Existing reservation data
- Products and services already sold or confirmed
- Identification of confirmed bookings held for client
- Confirmation of quotations supplied to client
- Finalisation of outstanding issues and financial matters with clients.

4. What are general non-air products and services sought by customers?

- Car hire
- Transfers
- Accommodation
- Entertainment
- Tours
- Cruises
- Entrances to attractions and sites
- Workshops, exhibitions, functions and events
- Insurance.

5. **What are three types of customer needs and preferences when seeking travel arrangements?**

- Packages
- Personalised travel plans
- Budget limitations
- Timing and duration
- Number of travellers
- Destinations
- Preferred carriers and suppliers
- Methods of travel
- Type and style of accommodation
- Attractions, sight-seeing trips and events
- Quotations and advice previously supplied to client
- Existing arrangements for the travel plan.

6. **Explain the process of identifying client requirements.**

- Meeting with the client, including face-to-face meetings, over the telephone contact and electronic communications
- Identifying the need to coordinate and integrate services for the bookings
- Determining and negotiating individual client wants, needs and preferences
- Identifying relevant specifics that relate to the identified wants, needs and preferences.

7. **What are examples of internal resources that can be used to identify tourism product and services information?**

Answers will vary.

8. What are three sources of general travel product and services information?

- Brochures/DVDs
- Hotel and accommodation guides and indexes
- Atlases, maps and encyclopaedias
- Travel guides
- Individual timetables
- Automated information systems
- Computerised Reservations Systems (CRS)
- Internal database of product suppliers and their details
- Supplier information
- Travel Trade Yearbook
- Travel Information Manual (TIM)
- Passenger air tariff
- Trade press
- General print and electronic media
- Literature
- Educationals
- Networks and contacts
- Other organisations in the industry
- The internet
- Product familiarisations
- The internet, travel websites, travel advisor, blogs
- Travel companies product launches, travel shows and information nights.

9. Why is it important to identify booking deadlines?

To ensure there is sufficient time to meet the needs of the clients and to ensure all documentation can be prepared and issued in sufficient time prior to scheduled departure.

10. What are factors impacting booking deadlines?

- Immediate need for travel
- Demand for specific travel times
- Carrier guidelines
- Advance notice timelines required by carriers and suppliers
- Client needs
- Relationship between cost and advanced booking dates/timelines
- Early bird specials or other applicable discounts.

11. What are activities associated in identifying appropriate suppliers?

- Identifying client requirements in terms of products and services
- Collecting information as to whom provides these products and services
- Identifying suitable suppliers
- Assessing alternatives against the identified requirements for the quotation
- Evaluating the alternatives against the given criteria for the quotation
- Accommodating host enterprise requirements in relation to the use of preferred suppliers, providers and carriers
- Aligning with established client preferences and individual client market research data/feedback
- Determine and select suppliers, providers and carriers to be provided as options to the client.

12. What types of suppliers provide tourism product and services?

- Cruise operators
- Railway operators
- Bus lines
- Car rental businesses
- Limousine hire
- Taxis
- Travel insurance providers
- Finance providers
- Currency exchange
- Conference and similar venues
- Interpreters
- Accommodation
- Attractions and Theme Parks
- Tour Operators
- Inbound Tour Wholesaler
- Outbound Tour Wholesaler
- Retail Travel Agents.

13. What are types of internal records?

- Client files
- Invoices
- Receipts
- Computerised system screens and fields.

14. What are reasons to update internal records?

- Adding confirmations and other responses from suppliers
- Adding communications from client
- Including documents and records relating to amendments and adjustments to initial request/booking
- Up-dating financial status of client file
- Receiving, processing and recording payments
- Generating and issuing invoices and credit notes for changed arrangements.

15. What are operational requirements to be considered when preparing quotations and itineraries?

- Carrier and supplier guidelines
- Regulatory requirements
- Host enterprise requirements
- Peak body requirements and procedures, where applicable, including fare construction rules, if applicable
- Use of correct documentation and/or computer screens and system information.

16. What information is normally included in a quotation and itinerary?

- Date of quotation and reference number
- Clients name
- Name and number of travellers or passengers, including indication of adults and children, where applicable
- Phone contacts and fax
- Email address
- Address
- Day and date of travel
- Departure and arrival times
- From and to destinations
- Name of carrier and identification of chosen option, including seat allocation, where applicable
- Class of travel
- All products and services required
- Inclusions and exclusions
- Fare, taxes, fees and charges
- Deposit or full payments required, if applicable
- Verification of connections and times, where applicable.
- Payment requirements and cancellation fees
- Conditions of the quote
- Service fees
- Expiry date of the quotation
- General conditions and rules.

17. What are examples of action that show a commitment that customers are ready to buy?

- Asking specific purchasing questions
- Taking out their credit card or wallet
- Looking for a pen to fill out a booking form
- Spending a long time studying one particular product
- Positive body language, leaning forward in their chair, responding to your eye contact, alert and attentive, frequently nodding.

18. What are the types of authority received by customers allowing you to proceed with a booking of travel products and services?

- Verbal notification from client
- Signed authority on standard organisational form.

19. What are two examples of organisational requirements that must be considered when forwarding requests to suppliers?

- Scope of authority limitations
- Designated person authorities for nominated suppliers
- Volume and value consideration related to booking
- Method of lodgement
- Timing requirements.

20. What are methods used to forward requests to suppliers?

- Sending hard copy requests
- Making verbal requests
- Lodging electronic requests.

21. What information would you like to get from suppliers to identify their responses to your request for travel products and services?

- Receipt of request
- Confirmations of ability to supply products and services as requested
- Responses regarding the inability to supply products and services as requested.

22. What are two methods of requesting confirmation of bookings?

- CRS booking status updates
- Courier (as an updated invoice)
- Online booking procedures
- Facsimile
- Email (as an updated invoice or message)
- Mail
- Telephone.

23. What are types of payments that clients can make to pay for travel services?

- Types of payments
- Credit card
- Cash, personal, business or traveller’s cheque
- Direct debit, electronic funds transfer
- Invoice/account
- Telephone payment
- E-mail or other electronic transmission.

24. What is the purpose of travel documents?

- Purpose of documents
- It details for the customer exactly what has been booked and confirmed and for whom
- It advises the customer who will be providing the service
- It provides additional information for the customer in relation to the utilisation of the product or service
- It contains reference information for the supplier or operator providing the service.

25. What are examples of travel documents and materials to be prepared?

- Confirmation letters
- Final itinerary
- Itinerary updates
- Invoice/Statement of account
- Receipts
- Welcome home letters
- Rail/coach tickets (e-Tickets)
- Airline tickets (e-Tickets)
- Insurance policies
- Car/hotel/tour vouchers
- Maps
- Custom and immigration forms
- Visa forms
- Passport forms
- Dossier
- Refund letter/credit note
- Vouchers.

26. What are activities associated with processing payments made by clients?

- Accepting payment based on standard host enterprise, industry or carrier/supplier requirements
- Issuing receipt
- Recording payment of deposit on internal documentation
- Advising client of amount outstanding, where applicable.

27. What are activities associated with issuing travel documentation?

- Issuing documentation to clients and passengers
- Providing documentation to accounts department
- Placing copies of documents in client file
- Providing documentation to carriers and suppliers
- Supplying documentation to operational staff, including tour leaders, tour guides, drivers
- Providing documentation to relevant authorities and government bodies.

28. What are host enterprise requirements to be considered when dispatching travel documents to customers?

- Security of the documents
- Use of preferred suppliers
- Designated method of forwarding documentation
- Recording evidence of sending of documents
- Capturing evidence that the customer has received the documents.

29. What are activities associated with paying suppliers?

- Taking into account monies already paid
- Requesting payment from the accounts department, or self-administering payment
- Conforming to approved or required methods of payment
- Ensuring timeliness of payment
- Completing relevant documentation
- Adding appropriate notifications into client file and up-dating records as required
- Factoring-in commissions due to the host enterprise.

30. What are types of payments that can be made to suppliers?

- Cheque
- Electronic payment
- Smart money – Tias Tips
- MoneyDirect
- BPay
- ENETT – via internet site or CRS
- Credit card.

Observation checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Construct and ticket a non-air travel plan D2.TTA.CL2.05
Dates of observation	
Instructions	1. Over a period of time observe the student completing each of the following tasks: a) Confirm client information and requirements for travel b) Process travel plan requirements c) Process travel documentation and payment 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required.

Did the candidate	Yes	No
Element 1: Confirm client information and requirements for travel		
Capture and/or confirm client details	❑	❑
Confirm existing arrangements relating to the travel plan	❑	❑
Identify and confirm needs and preferences of client	❑	❑
Identify and access appropriate resources and sources of information to enable processing of client requirements	❑	❑
Identify booking deadlines	❑	❑

Did the candidate	Yes	No
Element 2: Process travel plan requirements		
Select carriers and suppliers to accommodate identified client requirements	❑	❑
Up-date internal records	❑	❑
Construct costed draft itinerary in accordance with host enterprise operational requirements and identified client requirements	❑	❑
Obtain approval and authority to proceed with booking/s from client	❑	❑
Book approved itinerary with nominated carriers and suppliers	❑	❑
Obtain payment from client, as required	❑	❑
Element 3: Process travel documentation and payment		
Prepare required travel documentation to support approved client booking	❑	❑
Process payment/s by client	❑	❑
Issue travel documentation	❑	❑
Pay supplier	❑	❑
Did the student's overall performance meet the standard?	❑	❑

Feedback to student and trainer/assessor
Strengths:
Improvements needed:
General comments:

Candidate signature		**Date**	
Assessor signature		**Date**	

Third Party Statement

Student name:			
Name of third party:		**Contact no:**	
Relationship to student:	❑ Employer ❑ Supervisor ❑ Colleague ❑ Other *Please specify:____* *Please do not complete the form if you are a relative, close friend or have a conflict of interest]*		
Unit of competency:	Construct and ticket a non-air travel plan D2.TTA.CL2.05		
The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence. Please answer these questions as a record of their performance while working with you. Thank you for your time.			

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Element 1: Confirm client information and requirements for travel			
Capture and/or confirm client details	❑	❑	❑
Confirm existing arrangements relating to the travel plan	❑	❑	❑
Identify and confirm needs and preferences of client	❑	❑	❑
Identify and access appropriate resources and sources of information to enable processing of client requirements	❑	❑	❑
Identify booking deadlines	❑	❑	❑

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Element 2: Process travel plan requirements			
Select carriers and suppliers to accommodate identified client requirements	❑	❑	❑
Up-date internal records	❑	❑	❑
Construct costed draft itinerary in accordance with host enterprise operational requirements and identified client requirements	❑	❑	❑
Obtain approval and authority to proceed with booking/s from client	❑	❑	❑
Book approved itinerary with nominated carriers and suppliers	❑	❑	❑
Obtain payment from client, as required	❑	❑	❑
Element 3: Process travel documentation and payment			
Prepare required travel documentation to support approved client booking	❑	❑	❑
Process payment/s by client	❑	❑	❑
Issue travel documentation	❑	❑	❑
Pay supplier	❑	❑	❑

Comments/feedback from Third Party to Trainer/Assessor:	
Third party signature:	**Date:**
Send to:	

Competency recording sheet

Name of Student		
Name of Assessor/s		
Unit of Competency	Construct and ticket a non-air travel plan	D2.TTA.CL2.05
Date assessment commenced		
Date assessment finalised		
Assessment decision	Pass Competent / Not Yet Competent (Circle one)	
Follow up action required (Insert additional work and assessment required to achieve competency)		
Comments/observations by assessor/s		

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Confirm client information and requirements for travel						
Capture and/or confirm client details						
Confirm existing arrangements relating to the travel plan						
Identify and confirm needs and preferences of client						
Identify and access appropriate resources and sources of information to enable processing of client requirements						
Identify booking deadlines						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 2: Process travel plan requirements						
Select carriers and suppliers to accommodate identified client requirements						
Up-date internal records						
Construct costed draft itinerary in accordance with host enterprise operational requirements and identified client requirements						
Obtain approval and authority to proceed with booking/s from client						
Book approved itinerary with nominated carriers and suppliers						
Obtain payment from client, as required						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	**Observation of skills**	**3rd Party Statement**	**Oral Questions**	**Written Questions**	**Work Projects**	**Other**
Element 3: Process travel documentation and payment						
Prepare required travel documentation to support approved client booking						
Process payment/s by client						
Issue travel documentation						
Pay supplier						

Candidate signature:		**Date:**	
Assessor signature:		**Date:**	

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