

<b>Training Package</b>	<b>Tourism (THT02)</b>	<b>HSC Requirements and Advice</b>
<b>Title:</b>	<b>Process non-air documentation</b>	
<b>Unit Code</b>	<b>Unit Descriptor:</b>	<b>HSC Indicative Hours:</b>
<b>THTSOP09B</b>	This unit deals with the skills and knowledge required to process a range of documentation commonly used or issued within the tourism industry. It does not include documentation for air travel which is covered by the Unit THTSOP18A Process air documentation.	<b>30</b>

<b>Essential Knowledge and Skills to be Assessed</b>	<b>Critical Aspects of Assessment</b>	<b>Context of Assessment and Resource Implications</b>	<b>Assessment Methods</b>	<b>HSC Requirements and Advice</b>
<p>The following knowledge and skills must be assessed as part of this unit:</p> <ul style="list-style-type: none"> <li>procedures and principles that underpin the processing of documentation</li> <li>documentation types and standard formats used in the tourism industry</li> <li>basic product knowledge as appropriate to specific industry sector</li> <li>relationships between different sectors of the tourism industry in relation to requirements for and acceptance of tourism documentation</li> <li>basic understanding of the negotiated costs, contractual arrangements preferred supplier arrangements in place</li> <li>interpretation of the customer's requirements</li> <li>interpretation of any quotations previously supplied to customer.</li> </ul>	<p>Evidence of the following is critical:</p> <ul style="list-style-type: none"> <li>ability to correctly interpret the customer's requirements and specific services confirmed to the customer</li> <li>ability to correctly issue/process accurate tourism documentation within enterprise acceptable timeframes</li> <li>understanding of the principles that apply to the processing of any type of documentation.</li> </ul>	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> <li>demonstration of skills in processing tourism documentation for multiple reservations or bookings and for multiple different customers (ideally as a component of integrated work activity).</li> <li>demonstration of skills within a fully-equipped industry-realistic office environment using appropriate computers, printers and systems currently used in the tourism industry to control documentation functions</li> <li>use of industry-current customer file types and reservations data as the basis for the issuing of documentation</li> <li>use of industry-current document pro-formas, ticket or voucher types</li> <li>issuing of documentation within timeframes and constraints that reflect typical industry practice.</li> </ul>	<p>Assessment methods must be chosen to ensure that the skills required to process tourism documentation can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.</p> <p>The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> <li>evaluation of integrated activities completed by the candidate (may include destinations, products, quotations and ticketing)</li> <li>review of documents processed by the candidate</li> <li>written and oral questioning or interview to test knowledge of the principles which underpin the issuing of documentation, the requirements for various types of documents and the relationships between different sectors of the tourism industry</li> <li>review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.</li> </ul>	<p><b>Key Terms and Concepts</b></p> <ul style="list-style-type: none"> <li>billing cycle</li> <li>commissions</li> <li>conditions of sale</li> <li>cross-checking skills</li> <li>customer-based documentation</li> <li>debt collection</li> <li>debtor reconciliation</li> <li>distribution strategy</li> <li>famils (familiarisation tours)</li> <li>outstanding debts</li> <li>preferred product arrangements</li> <li>proofreading</li> <li>readability/legibility</li> <li>reservation data</li> <li>sources of product information</li> <li>supplier-based documentation</li> <li>transcription skills.</li> </ul>

		<b>Linkages with Other Units</b>		
		<p>This unit must be assessed with or after the following unit. That unit describes skills and knowledge that are essential to this unit of competence:</p> <ul style="list-style-type: none"> <li>• THTSOP03B Access and interpret product information</li> </ul> <p>This unit has strong linkages to the range of Sales and Office Operations units and combined assessment is recommended. Depending on the industry sector or enterprise context, this unit could be assessed with:</p> <ul style="list-style-type: none"> <li>• THTSOP05B Prepare quotations</li> <li>• THTSOP07B Book and co ordinate supplier services</li> <li>• THTSOP08B Operate a computerised reservations system</li> <li>• THTSOP18A Process air documentation</li> </ul>		

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
<b>1 Interpret information required for processing of documentation</b>	1.1 Identify deadline for preparation and despatch of documents.	<p>This unit applies to all tourism industry sectors and enterprises where travel and tourism documents are issued to customers and/or tour delivery staff. The following explanations identify how this unit may be applied in different workplaces, tourism sectors and circumstances.</p> <p>Documentation may be produced for:</p> <ul style="list-style-type: none"> <li>• a single product or service</li> <li>• multiple products and services making up a complete itinerary</li> <li>• groups</li> <li>• individuals</li> <li>• guests/delegates</li> <li>• one off touring arrangements</li> <li>• series tours</li> <li>• incentive tours</li> <li>• meetings</li> <li>• conferences.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>Customer-based documentation:</p> <ul style="list-style-type: none"> <li>• tickets</li> <li>• vouchers</li> <li>• insurance policies</li> <li>• travellers cheques</li> <li>• itineraries.</li> </ul> <p>Supplier-based documentation:</p> <ul style="list-style-type: none"> <li>• sales returns</li> <li>• commission vouchers</li> <li>• booking forms.</li> </ul>
	1.2 Interpret existing reservation data held for the customer to correctly identify all customer details.	<p>Customer reservation data may be:</p> <ul style="list-style-type: none"> <li>• a computer file</li> <li>• a manual file.</li> </ul> <p>Customer details may include:</p> <ul style="list-style-type: none"> <li>• name</li> <li>• age</li> <li>• special requirements to be noted on documents</li> <li>• agent's details</li> <li>• address for delivery of documents</li> <li>• date for required delivery of documents.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>Accessing manual reservation data to check customer details including:</p> <ul style="list-style-type: none"> <li>• name</li> <li>• age</li> <li>• special requirements to be noted on documents</li> <li>• agent's details</li> <li>• address for delivery of documents</li> <li>• date for required delivery of documents.</li> </ul>
	1.3 Identify and correctly interpret details of specific products and services which have been sold and confirmed to the customer.	<p>Products and services may be:</p> <ul style="list-style-type: none"> <li>• domestic</li> <li>• international.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>Access and interpret information required for the completion of documentation for customers including:</p> <ul style="list-style-type: none"> <li>• times</li> <li>• availability of services</li> <li>• costs/fares</li> <li>• conditions</li> <li>• service identification</li> <li>• inclusions and exclusions</li> <li>• acceptable codes</li> <li>• terminology.</li> </ul>

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
			Explaining conditions of sale including: <ul style="list-style-type: none"> <li>• scheduling details</li> <li>• inclusions, exclusions and optional product components</li> <li>• conditions, rules and legal issues</li> <li>• costings</li> <li>• booking and confirmation procedures</li> <li>• deposit, payment and cancellation procedures</li> <li>• product codes</li> <li>• specifications of service providers.</li> </ul>
	1.4 Identify confirmed bookings held for customers and costs quoted by product and service suppliers.	Suppliers may be either: <ul style="list-style-type: none"> <li>• internal or</li> <li>• external to the organisation.</li> </ul>	<b>Learning experiences for the HSC must address:</b> Assisting customers to complete the following forms: <ul style="list-style-type: none"> <li>• passport application</li> <li>• visa application</li> <li>• booking forms.</li> </ul>
	1.5 Identify sources of any general information required to correctly issue all required documents.	General sources of information required to correctly issue all required documents may include: <ul style="list-style-type: none"> <li>• timetables</li> <li>• brochures</li> <li>• price schedules</li> <li>• contracts with suppliers</li> <li>• computerised reservation system</li> <li>• database of product suppliers and their details</li> <li>• Internet sites</li> <li>• visa guides.</li> </ul>	<b>Learning experiences for the HSC must address:</b> How to access and validate sources of information relevant to the issuing of documents. Sources of tourism information including: <ul style="list-style-type: none"> <li>• computerised reservation system</li> <li>• Internet</li> <li>• brochures</li> <li>• electronic media</li> <li>• price schedules</li> <li>• timetables</li> <li>• tariff sheets</li> <li>• trade shows</li> <li>• database of product suppliers and their details</li> <li>• Internet sites</li> <li>• visa guides</li> <li>• famils (familiarisation tours)</li> <li>• training courses</li> <li>• industry product updates.</li> </ul>
	1.6 Check payment status and take appropriate action.	Actioning payments required by the supplier may involve: <ul style="list-style-type: none"> <li>• requesting payment from the accounts department eg cheque requisition or purchase order</li> <li>• self administering the payment:</li> <li>• issuing a miscellaneous charges order</li> <li>• sending payment by cheque, electronic transmission.</li> </ul>	<b>Learning experiences for the HSC must address:</b> Actioning payments required by the supplier including: <ul style="list-style-type: none"> <li>• cheque requisition or purchase order</li> <li>• self administering the payment</li> <li>• issuing a miscellaneous charges order</li> <li>• sending payment by cheque and electronic transmission</li> </ul>

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
	1.7 Check for and report any discrepancies in costs quoted to the customer and actual cost of services and take any follow up action required to collect any shortfall.		<p><b>Learning experiences for the HSC must address:</b></p> <p>Checking procedures:</p> <ul style="list-style-type: none"> <li>• cross-referencing final accounts to quote</li> <li>• proofreading</li> <li>• verifying calculations.</li> </ul> <p>Reasons for variances between final costs and initial quotes.</p> <p>Customer service issues related to payments including:</p> <ul style="list-style-type: none"> <li>• advising customer of additional amounts owing</li> <li>• handling customer objections</li> <li>• extended payment options</li> <li>• penalties for late or non-payment.</li> </ul>
<b>2 Process documentation</b>	2.1 Prepare complete and accurate documentation within designated timeframes.	<p>Documentation may include:</p> <ul style="list-style-type: none"> <li>• accommodation vouchers</li> <li>• bus/coach or other form of transportation tickets</li> <li>• car hire/motor home vouchers</li> <li>• cruise vouchers</li> <li>• tour vouchers</li> <li>• vouchers for attraction/theme park entry</li> <li>• vouchers for any tourism product or service</li> <li>• meeting or event confirmation letters</li> <li>• delegate information packs</li> <li>• travel insurance documentation</li> <li>• confirmation vouchers</li> <li>• commission vouchers</li> <li>• visa forms</li> <li>• visas</li> <li>• passport forms</li> <li>• travellers cheque requests</li> <li>• passenger itineraries</li> <li>• operational itineraries for crew eg Tourist Guide, Drivers, Tour Managers</li> <li>• briefing notes for crew</li> <li>• passenger lists</li> <li>• rooming lists</li> <li>• proformas</li> <li>• sales returns.</li> </ul> <p>Documents may be produced:</p> <ul style="list-style-type: none"> <li>• manually</li> <li>• using a computer</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>Documentation includes:</p> <ul style="list-style-type: none"> <li>• vouchers for any tourism product or service</li> <li>• tickets (non-air)</li> <li>• meeting or event confirmation letters</li> <li>• delegate information packs</li> <li>• travel insurance documentation</li> <li>• commission vouchers</li> <li>• visas</li> <li>• passport forms</li> <li>• travellers cheque requests</li> <li>• passenger itineraries</li> <li>• briefing notes for crew</li> <li>• passenger lists.</li> </ul> <p>Enterprise policy in terms of :</p> <ul style="list-style-type: none"> <li>• commissions</li> <li>• preferred product arrangements.</li> </ul>

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
	2.2 Record all required details with complete accuracy on all documentation.		<p><b>Learning experiences for the HSC must address:</b></p> <p>Preparing documents manually including the following:</p> <ul style="list-style-type: none"> <li>• transcription skills</li> <li>• cross-checking skills</li> <li>• readability/legibility issues.</li> </ul> <p>Pros and cons of preparing manual and computer-generated documents.</p>
	2.3 Make appropriate calculations and record any required costs on documents.		<p><b>Learning experiences for the HSC must address:</b></p> <p>Calculations including:</p> <ul style="list-style-type: none"> <li>• subtotal</li> <li>• net total</li> <li>• GST</li> <li>• discounts</li> <li>• special offers</li> <li>• full rates</li> <li>• child rates</li> <li>• student rates</li> <li>• penalties.</li> </ul>
	2.4 Action any payment required by the supplier at the appropriate time in accordance with enterprise procedures.	<p>Actioning payments required by the supplier may involve:</p> <ul style="list-style-type: none"> <li>• requesting payment from the accounts department eg cheque requisition or purchase order</li> <li>• self administering the payment:</li> <li>• issuing a miscellaneous charges order</li> <li>• sending payment by cheque, electronic transmission.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>Payment details including:</p> <ul style="list-style-type: none"> <li>• requesting payment from the accounts department</li> <li>• self-administering the payment</li> <li>• issuing a miscellaneous charges order</li> <li>• sending payment by cheque and electronic transmission.</li> </ul>
	2.5 Check all documentation for accuracy prior to issue and amend as necessary.		<p><b>Learning experiences for the HSC must address:</b></p> <p>Checking all aspects of documentation including:</p> <ul style="list-style-type: none"> <li>• reading for meaning</li> <li>• proofreading</li> <li>• verifying calculations</li> <li>• obtaining required authorisations.</li> </ul>

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
	2.6 Process, file and despatch copies of documents in accordance with enterprise and supplier procedures and requirements.	Copies of documents may be supplied to: <ul style="list-style-type: none"> <li>the file</li> <li>the accounts department</li> <li>operational personnel involved in the delivery of a tour eg tourist guide, driver</li> <li>the supplier of the service.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>Issuing completed documents according to industry and enterprise standards including:</p> <ul style="list-style-type: none"> <li>meeting timelines</li> <li>recording accurate details</li> <li>making correct calculations.</li> </ul>
	2.7 Despatch documents according to customer and enterprise requirements.		<p><b>Learning experiences for the HSC must address:</b></p> <p>Issuing completed documents according to industry standards and customer expectations.</p> <p>Enterprise distribution strategy.</p>

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	1	Interpreting a customer file and ascertaining which specific services need to be documented.
Communicating Ideas and Information	1	Providing clear information to the customer and the supplier on vouchers and itineraries
Planning and Organising Activities	1	Prioritising the sequence of files to be documented and actioning these to ensure the documents are issued within the required deadline.
Working with Others and in Teams	1	Assisting with the work overflow of other personnel involved in issuing documents
Using Mathematical Ideas and Techniques	1	Calculating the costs of vouchers and ensuring they match any previously confirmed rates
Solving Problems	1	Reorganising the work schedule to accommodate any late urgent requests to issue documents
Using Technology	1	Using a computerised booking system to issue documents