# SELF ASSESSMENT GUIDE

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<tr>
<th>Qualification:</th>
<th>MULTIMODAL TRANSPORT OPERATIONS AND LOGISTICS SERVICES NC II</th>
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| Units of Competency Covered: | • Perform industry calculation in freight forwarding and documentation services  
• Process transport documents for import cargo  
• Prepare request for payment and billings  
• Prepare and complete statistical reports  
• Process shipping documents  
• Liaise with relevant stakeholders  
• Address bottlenecks and work disruptions |

**Instruction:**
- Read each of the questions in the left-hand column of the chart.
- Place a check in the appropriate box opposite each question to indicate your answer.

## Can I?

<table>
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<th>YES</th>
<th>NO</th>
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### PERFORM INDUSTRY CALCULATION IN FREIGHT FORWARDING AND DOCUMENTATION SERVICES

**Carry out calculations.** *

- Identify and calculate volume and weight as required in workplace tasks. *

- Perform calculations needed to complete work task using the four basic processes of addition, subtraction, multiplication and division or any appropriate. *

- Perform calculations involving fractions, percentages and mixed numbers and using the four basic processes as required to complete workplace procedures. *

- Use the functions of a calculator, numeric keypad of computer to perform mathematical operations. *

- Self-check and corrects numerical information for accuracy. *

**Prepare cost estimates.** *

- Identify cargo weight and dimension in accordance with standard operating procedure. *

- Apply standard tariff for destination charges and/or agreed rates in accordance with standard operating procedure. *

- Use applicable foreign exchange rate conversion for cost estimate in accordance with industry practice. *
- Estimate quantities of materials and resources required to complete a work task. *

- Make accurate estimates for work completion. *

**Interpret graphical representations of mathematical information** *

- Recognize information represented in symbols, diagrams, markings, signage and pictorial representations. *

- Establish applicable format presentation in accordance with company procedure. *

- Establish comparative variances of performance data in accordance with company procedure. *

**PROCESS TRANSPORT DOCUMENTS FOR IMPORT CARGO**

**Gather applicable documentation requirements for import cargo**

- Identify documentation requirements in accordance with established standard procedures.

- Assess commodity type, size, commercial value, shipping method, classification according to established standards and procedures.

- Gather import documentary requirements and any missing document or discrepancy for rectification is identified and reported to the superior in accordance with workplace and regulatory procedures.

- Observe established timelines and procedures for gathering import shipping documents in compliance with workplace and regulatory procedure.

**Prepare import documentary requirements**

- Check import shipping documents obtained for accuracy and completeness in accordance with import requirements and procedures.

- Monitor and confirm arrival details with the carriers in accordance with work procedures.

- Prepare and submit inward foreign manifest in accordance with customs regulations and workplace procedures.

**Issue documentary requirements for import delivery**

- Issue notice to the consignee.

- Prepare all import documentary requirements to facilitate transfer and stripping of import cargoes.
- Issue delivery order to consignee or its authorized representative upon fulfillment of all documentary and financial requirements.

- Address discrepancy, other documentary requirements and procedures in accordance with standard procedure.

**Track and update status of import cargo**

- Report any cargo irregularity to the superior for appropriate action in accordance with workplace and regulatory procedures.

- Monitor and report status of cargo release to the superior in accordance with agreed lead time and regulatory requirements.

- Coordinate any special instructions with concerned parties in accordance with client’s and workplace requirements.

**PREPARE REQUEST FOR PAYMENT AND BILLINGS**

*Prepare payments and billings.*

- Secure billing statement from the carrier within prescribed timeline according to workplace procedure. *

- Request for checks/cash for payment of carrier’s charges and other suppliers. *

- Prepare and submit carrier’s import delivery requirements in exchange of carrier’s delivery order upon payment of carrier’s charges. *

- Prepare draft billing to consignee for checking and approval of superior in accordance with workplace procedure. *

- Finalize and serve approved billing draft to clients. *

*Monitor payments and collections.*

- Identify timelines and procedures of payments and collections of import charges. *

- Make collections and payments within the established timeline and procedures. *

- Report any irregularity and inconsistency to superior for resolution.*

*Complete and record of transaction.*

- Establish import transaction history for future reference. *

- Prepare import statistics summary report for ready reference.*
- Obtain and record proof of delivery in accordance with workplace procedure. *

**PREPARE AND COMPLETE STATISTICAL REPORTS**

**Collate data for reports.** *

- Identify data required for reporting in accordance with workplace procedure and requirements. *
- Identify applicable formats for reporting in accordance with workplace procedure and requirements. *
- Collate data required in accordance with workplace procedure and requirements.

**PROCESS SHIPPING DOCUMENTS**

**Familiarize documents subject for external processing**

- Identify documents for external processing in accordance with workplace procedure.
- Prepare documents for external processing including financial requirements in accordance with workplace procedure.
- Check documents for external processing for completeness and accuracy in accordance with workplace procedure.
- Report status of work to superior within established timeline and procedure.

**Process documents**

- Identify relevant stakeholders who will process documents in accordance with workplace procedure.
- Prepare work plan and schedule in accordance with workplace standard operating procedure.
- Monitor and report status of processing activities to the superior.
- Submit and report processed documents to superior in accordance with set timeline.

**Liquidate expenses** *

- Collate proof of payments in accordance with company procedure.*
- Tally amounts cash advances in accordance with company procedure.*
- Submit liquidation reports for approval by the superior in accordance with company procedure. *

**LIAISE WITH RELEVANT STAKEHOLDERS**

**Maintain updated list of relevant stakeholders**

- Record database of relevant stakeholders according to workplace procedure.
- Organize database of relevant stakeholders according to workplace procedure.
- Update database of relevant stakeholders regularly.

**Familiarize with the processes and requirements of relevant stakeholders**

- Gather vital work related information of relevant stakeholders.
- Organize vital work related information of relevant stakeholders.
- Update regularly vital work related information of relevant stakeholders.

**Maintain good rapport with relevant stakeholders.** *

- Identify focal contact persons for each relevant stakeholder in accordance with workplace procedures. *
- Initially establish work relationship with relevant stakeholders through face to face meetings. *
- Establish regular and open communication with relevant stakeholders with workplace procedure. *

**ADDRESS BOTTLENECKS AND WORK DISRUPTIONS**

**Familiarize with workplace procedure and practices**

- Obtain workplace procedures and practices in accordance with company protocols.
- Study workplace procedures and practices in accordance with company protocols.
- Apply workplace procedures and practices in accordance with company protocols.

**Identify possible challenges and disruptions**

- Prepare a list of possible challenges and disruptions in accordance with company protocols. *
- Establish contingency plan in accordance with company protocols.*
- Update and improve processes according to results of experiences in accordance with company protocols.

**Implement the contingency plan as required**

- Identify the specific challenges and disruptions in accordance with company protocols.
- Apply contingency plan to address the specific challenges and disruptions in accordance with company protocols.*
- Prepare reports based on the specific challenges, disruptions, and contingency plan in accordance with company protocols.

I agree to undertake assessment in the knowledge that information gathered will only be used for professional development purposes and can only be accessed by concerned assessment personnel and my manager/supervisor.

<table>
<thead>
<tr>
<th>Candidate’s Name &amp; Signature</th>
<th>Date:</th>
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* Critical Aspects of Competency

**NOTE:** The Candidate MUST bring calculator to take the assessment.