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SELF ASSESSMENT GUIDE

Qualification:	MULTIMODAL TRANSPORT OPERATIONS AND LOGISTICS SERVICES NC IV		
Units of Competency Covered:	<ul style="list-style-type: none"> • Supervise / manage activities involving import seafreight • Oversee the import seafreight team’s performance • Oversee the coordination with overseas agents on shipment status particularly on any irregularities • Control of shipping documents • Ensure that claims arising from cargo losses, damages, theft and other irregularities are processed. • Evaluate reports required to support business decisions and comply with government requirements. 		
Instruction:			
<ul style="list-style-type: none"> • 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. 			
<i>Can I?</i>		YES	NO
SUPERVISE / MANAGE ACTIVITIES INVOLVING IMPORT SEAFREIGHT			
Familiarize with business processes			
<ul style="list-style-type: none"> • Coordinate with admin on orientation regarding business process manuals in accordance with company policies and procedures. 			
<ul style="list-style-type: none"> • Study the business process standard operating procedure, forms and materials in accordance with company policies and procedures. * 			
<ul style="list-style-type: none"> • Arrange schedule to observe actual processes in accordance with company policies and procedures. 			
<ul style="list-style-type: none"> • Record observation of any irregularities in the business process in accordance with company policies and procedures. 			
Disseminate information about seafreight import policies procedures and regulations			
<ul style="list-style-type: none"> • Communicate Policies and regulations on sea freight import to employees through orientation activities in accordance with company procedures. * 			
<ul style="list-style-type: none"> • Confirm disseminated information are understood and properly interpreted in accordance with company policies. 			
<ul style="list-style-type: none"> • Monitor implementation of Policies and procedures in accordance with company requirements and government regulations. 			

<ul style="list-style-type: none"> Record result of orientation and work instructions in accordance with quality management system. 		
Implement business processes		
<ul style="list-style-type: none"> Arrange initial hands on training and observation of the process for all seafreight import in accordance to company requirements. * 		
<ul style="list-style-type: none"> Motivate employees for positive results. 		
<ul style="list-style-type: none"> Evaluate processes implemented for continuous improvement in accordance with established quality management system. 		
Evaluate business processes and staff performance		
<ul style="list-style-type: none"> Conduct performance review of employees regularly. 		
<ul style="list-style-type: none"> Communicate performance review result and outcome of employees accordingly. 		
<ul style="list-style-type: none"> Discuss and agree improvement of business process upon by the import sea freight team. 		
Monitor implementation of business processes		
<ul style="list-style-type: none"> Review Business processes in accordance with existing policies and procedures. 		
<ul style="list-style-type: none"> Analyze poor performances and introduces corrective measures. * 		
<ul style="list-style-type: none"> Identify discrepancies / deviations in the output based on business process. * 		
Evaluate business processes and staff performance		
<ul style="list-style-type: none"> Regularly conduct performance review of employees in accordance with company policies and standards. * 		
<ul style="list-style-type: none"> Communicate outcomes of performance review results of employees in accordance to company policy. * 		
<ul style="list-style-type: none"> Discuss improvement of business processes and agreed upon by the import seafreight team in accordance with company policy. * 		
<ul style="list-style-type: none"> Record observation of any irregularities I the business process on accordance with company policies and procedures. * 		

Pre - evaluate potential suppliers		
• Identify suppliers of required goods/materials/services in accordance with workplace requirements and regulatory procedures.		
• Obtain comparative costings for required goods/materials/services in accordance with workplace requirements and regulatory procedures.		
• Assess supplier's ability to provide a consistent level of performance in accordance with workplace and regulatory procedures.		
• Evaluate suppliers in relation to performance, price and established criteria and in accordance with workplace and regulatory procedures. *		
• Document supplier selection process outcomes including recommendations for action on agreements with selected suppliers in accordance with workplace and regulatory procedures. *		
• File and maintain data generated during selection process in accordance with workplace procedures.		
OVERSEE THE IMPORT SEAFREIGHT TEAM'S PERFORMANCE		
Familiarize with company protocols		
• Identify Reporting Lines according to Company's organizational structure. *		
• Learn and comply reporting methods in accordance with the company standards.		
• Observe Standard Operating procedures, forms and materials in accordance with Quality management systems.		
Familiarize oneself with the functions and Responsibilities of the Import Supervisor / Manager		
• Familiarize Job Description of import manager in accordance with company policy. *		
• Study business process manual of import manager in accordance with company rules and regulations. *		
• Observe the methods and applications of import supervisor's / manager's responsibilities in accordance with company rules and regulations.		
Participate in planning and organizing activities of import sea freight department.		
• Review work processes of all import sea freight staff in accordance to company policy and procedures.		

<ul style="list-style-type: none"> Organize coaching and training of all import sea freight staffs in accordance to company scheduled trainings and skill enhancement activities. 		
<ul style="list-style-type: none"> Recommend staff qualification, substitution and assignments in accordance with company standards. 		
<ul style="list-style-type: none"> Observe and evaluate performance criteria of all import seafreight staff in accordance to company. 		
Disseminate work instructions for proper implementation.		
<ul style="list-style-type: none"> Disseminate work instruction in accordance with company policy and procedure. 		
<ul style="list-style-type: none"> Monitor method of completion of work instruction in accordance with company work procedure. 		
<ul style="list-style-type: none"> Measure accuracy and timeliness of implementation in accordance with Key Performance Indicators. 		
Gather and validate data in setting up budgets and KPI's of import sea freight department.		
<ul style="list-style-type: none"> Gather import seafreight shipment in accordance with company procedures. 		
<ul style="list-style-type: none"> Validate data gathered based on established checklist. 		
<ul style="list-style-type: none"> Analyze data in relation to current market trends, business practices, and new industry regulations. 		
<ul style="list-style-type: none"> Implement Improvements and strategies in accordance with established guidelines. * 		
OVERSEE THE COORDINATION WITH OVERSEAS AGENTS ON SHIPMENT STATUS PARTICULARLY ON ANY IRREGULARITY		
Review for accuracy and completeness of shipping documents		
<ul style="list-style-type: none"> Verify and correct discrepancies in the shipping documents with the overseas agents. * 		
<ul style="list-style-type: none"> Resolve and approve Details of discrepancy within the specified time of submission of e-manifest with the Bureau of Customs. * 		
<ul style="list-style-type: none"> Communicate and agree upon Applicable Charges, fees, and penalties as a result of discrepancy with overseas agent. * 		
Ensure correct processing and handling of transport documents		
<ul style="list-style-type: none"> Determine type of bill of lading in accordance with client's requirement. * 		
<ul style="list-style-type: none"> Comply with requirements for the release of delivery order in accordance with company procedures. * 		

<ul style="list-style-type: none"> Keep and retain import records for a prescribed period for reportorial purposes. 		
Review the accuracy of invoices / billing statements of overseas agent.		
<ul style="list-style-type: none"> Ensure that a debit note or a credit note is received before a billing statement to importer is made in accordance with company's accounting standards and procedure. 		
<ul style="list-style-type: none"> Approve the profit and loss statement in accordance with company policies. 		
<ul style="list-style-type: none"> Prepare and approve the billing to consignee in accordance with established rates and charges. 		
CONTROL SHIPPING DOCUMENTS		
Receive all relevant import seafreight information and documents		
<ul style="list-style-type: none"> Ensure that a debit note or a credit note is received before a billing statement to importer is made in accordance with company's accounting standards and procedure. 		
<ul style="list-style-type: none"> Approve the profit and loss statement in accordance with company policies. 		
<ul style="list-style-type: none"> Prepare and approve the billing to consignee in accordance with established rates and charges. 		
Approve charges for billing		
<ul style="list-style-type: none"> Check charges in the billing statement according to agreed charges with the customer and standard import tariff and other charges. * 		
<ul style="list-style-type: none"> Check and apply applicable foreign exchange rate in accordance with Philippine guiding rates. 		
<ul style="list-style-type: none"> Approve billing for release to consignee or authorized representative within the required timeline. 		
Request for payment is reviewed and approved		
<ul style="list-style-type: none"> Check request for payment in accordance with carrier's standard tariff. * 		
<ul style="list-style-type: none"> Approve request for payment in accordance with company procedures. * 		
<ul style="list-style-type: none"> Issue work instruction to liaison personnel for settlement of carrier's charges in accordance with company procedures. 		
Monitor proper handling of seafreight import documents		
<ul style="list-style-type: none"> Conduct regular audit of documentation according to company procedures. * 		

<ul style="list-style-type: none"> Identify deviations from Standard Operating Procedures on seafreight import documentation in accordance with established company procedures. 		
<ul style="list-style-type: none"> Adapt corrective and preventive measures in accordance with company policies. 		
Organize and preserve relevant documents for future reportorial purposes.		
<ul style="list-style-type: none"> Identify relevant documents for safe keeping in accordance with company procedures. 		
<ul style="list-style-type: none"> Sort out relevant documents in accordance with company procedures. 		
<ul style="list-style-type: none"> Store relevant documents in accordance with the retention policy of the company. 		
ENSURE THAT CLAIMS ARISING FROM CARGO LOSSES, DAMAGES, THEFT AND OTHER IRREGULARITIES ARE PROCESSED		
Gather and analyze documentary evidences of irregularity.		
<ul style="list-style-type: none"> Receives notice of claim in accordance with established procedures. * 		
<ul style="list-style-type: none"> Evaluates complaints or claims in accordance with contract of carriage. 		
<ul style="list-style-type: none"> Prepares initial report based on documents and result of investigation. * 		
Investigate the nature of claim		
<ul style="list-style-type: none"> Collate all legal documents involved in the discrepancy in accordance with conditions of carriage. 		
<ul style="list-style-type: none"> Engage the services of the certified cargo surveyor to conduct ocular inspection where the damages are discovered. 		
<ul style="list-style-type: none"> Prepare the preliminary report stating the nature of identified and alleged discrepancy. * 		
Report the incident of damages and losses to all concerned parties.		
<ul style="list-style-type: none"> Report the incident of claim to admin / legal department. 		
<ul style="list-style-type: none"> Report the claim Incidence to foreign agents. * 		
<ul style="list-style-type: none"> Inform the consignee on record about the incident including all aggrieved parties. * 		

Process the cargo claim		
• Identify The prescription period in accordance with time bar stipulated in the transport contract. *		
• Attach Pertinent documents and supporting records to the notice of claim in accordance with standard claims procedure.		
• Prepare and file the notice of claim to all concerned party.		
• Segregate the claim record for future references.		
EVALUATE REPORTS REQUIRED TO SUPPORT BUSINESS DECISIONS AND COMPLY WITH GOVERNMENT REQUIREMENTS		
Familiarize with reports for internal use and for statutory purposes.		
• Identify different types of internal reports in accordance with the company policies. *		
• Study Standard Operating Procedures, forms and materials in accordance with company policies. *		
• Arrange schedule to observe actual preparation of reports in accordance with company policies and procedures.		
Identify and organize the kind of data required for report preparations		
• Identify sources and types of information needed with all sea freight import employees.		
• Prepare checklist for the data required based on report needed.		
• Communicate timeline, methodology, and sources of data to import sea freight staff in accordance with the checklist. *		
Conduct data gathering		
• Assign data to be gathered to import sea freight staff in accordance with their respective function.		
• Monitor data gathering based on company policies.		
• Review data gathered in accordance with established procedures.		
Evaluate report		
• Validate data gathered for accuracy and completeness based on required report		

<ul style="list-style-type: none"> • Results of data gathered are analyzed according to report requirement. 		
<ul style="list-style-type: none"> • Presents recommendation/s based on the analysis of data to superior authority in accordance with reportorial requirements. 		
<p>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.</p>		
<p style="text-align: center;">Candidate's Name & Signature</p>	<p style="text-align: center;">Date:</p>	

* *Critical Aspects of Competency*

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