

**U01102: Prepare guest accounts and handle departures**

Unit Descriptor:

This unit describes the competence required to prepare guest accounts and handle departures.

**The unit describes the essential abilities of:**

- Responding to customer needs
- Communicating effectively
- Problem solving
- Keeping records
- Operating within organizational procedures
- Meeting legal requirements

**ELEMENT****PERFORMANCE CRITERIA**

		<i>To be competent you must achieve the following:</i>
1.	Prepare and maintaining guest accounts	1.1 Charges are entered regularly and accurately against guest accounts in the account system.  1.2 Account adjustments are recorded accurately against guests' accounts.  1.3 Account documentation is correctly filed and stored at all times.  1.4 Guest accounts reaching credit limits are identified and appropriate action is taken in line with service operations.  1.5 Guest accounts are completed accurately for presentation to guests.  1.6 Guest accounts are secured from unauthorized access.

- 1.7 Unexpected situations are dealt with effectively and the appropriate person(s) informed where necessary.
- 1.8 All work is prioritized and carried out in an organized and efficient manner in accordance with legal requirements and organizational procedures.
2. Handle the departure of guests
  - 2.1 Documentation and other items required are prepared in advance of guest departure.
  - 2.2 Guest are greeted and dealt with in a polite manner at all times.
  - 2.3 Guest account details are discreetly checked with guest and payment requested as required.
  - 2.4 Departure documentation is completed and dealt with using correct account or booking systems.
  - 2.5 Keys and other establishment property are collected from guest before departure.
  - 2.6 Guests' complaints, comments and suggestions are recorded and fed back to the appropriate person or department.
  - 2.7 Establishment services and facilities are promoted at all appropriate times.
  - 2.8 Unexpected situations are dealt with effectively and the appropriate person(s) are informed where necessary.
  - 2.9 All work is prioritised and carried out in an organized and efficient manner in accordance with legal requirements and organizational procedures.

**RANGE STATEMENT**

Element 1: Prepare and maintain guests' accounts

**A. Customer accounts:**

- (i) those reaching/exceeding credit limits
- (ii) those within credit limits

**B. Account system: (*Also applies to element 2*)**

- (i) computerized systems
- (ii) manual systems

**C. Account adjustments:**

- (i) charges
- (ii) refunds
- (iii) allowances/discounts
- (iv) deposits/prepayments
- (v) transfers

**D. Unexpected situations:**

- (i) problems with systems

**E. Legal requirements:**

- (i) Current relevant legislation relating to preparing and maintaining customer accounts and safe, hygienic working practices

Element 2: Handle the departure of guests

**F. Guest Account:**

- (i) those where part payment is required
- (ii) those where full payment is required
- (iii) those where the account does not require immediate settlement

**G. Unexpected situations**

- (i) problems with guest
- (ii) problems with documentation

**H. Legal requirements**

- (i) current relevant legislation relating to accommodation, goods, services for sale and safe hygiene working practices when dealing with the departure of customers

**UNDERPINNING KNOWLEDGE AND SKILLS****Organizational Procedures**

1. Why guest accounts must be updated regularly with charges and adjustments.

**Customer Care**

2. Why it is important to give accurate verbal and written information to guests.

**Security**

3. Why guest accounts must be secured from unauthorized access.

**EVIDENCE GUIDE****(1) Critical Aspects of Evidence**

- You must provide evidence that shows you have met the performance criteria over a significant period of time for your assessor to consider that you are competent.
- Totally through performance evidence in the form of observation and products of work, e.g. guest folio, bills, filing systems or
- By performance evidence in the form of observation and/or products of work to cover **performance criteria 1.1, 1.2, 1.3, 1.5, 1.6** and **all** from the range of **A**, **one (1)** from the range of **B**, **three (3)** from the range of **C**.
- By performance evidence in the form of observation and products of work to cover **performance criteria 2.1 – 2.7** and a minimum of **two (2)** from the range of **F** and **one (1)** from the range of **B**.
- By supplementary evidence in the form of questioning and/or role-play and/or witness testimony to cover the rest of the performance criteria and range.
- Evidence to cover underpinning knowledge must be assessed using questioning which may be oral, written or using visual aids.

**(2) Methods of Assessment**

- Observation reports by assessors of how you prepare guests accounts and handle departures.
- Copies of written communication to and from customers.
- Answers to oral or written questions from your assessor (these questions and answers may be recorded by your assessor).
- Witness statement from customers, colleagues, line managers that provide evidence of how you:
  - o prepare and maintain guests' accounts
  - o handle the departure of guests
- A personal statement describing how you:
  - o prepare and maintain guests' accounts
  - o handle the departure of guests

**(3) Context of Assessment**

Assessment of performance requirements in this unit should be undertaken in an actual work environment. Simulation will only be accepted where specified.