



Highfield Level 2 End-Point Assessment for ST0339 Passenger Transport Operative

End-Point Assessment Kit



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EPA Kit

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Versions

ST0339 / v1.2

PTO v2.0

How to Use this EPA Kit

Welcome to the Highfield End-Point Assessment Kit for the Passenger Transport Operative apprenticeship standard.

Highfield is an end-point assessment organisation that has been approved to offer and carry out end-point assessments for the Level 2 Passenger Transport Operative apprenticeship standard.

The EPA Kit is designed to outline all you need to know about the end-point assessments for this standard and will also provide an overview of the on-programme delivery requirements. In addition, advice and guidance for trainers on how to prepare apprentices for the end-point assessment is included. The approaches suggested are not the only way in which an apprentice may be prepared for their assessments, but trainers may find them helpful.

In this kit, you will find:

- an overview of the standard and any on-programme requirements
- a section focused on amplification
- guidance on how to prepare the apprentice for gateway
- detailed information on which part of the standard is assessed by which assessment method
- suggestions on how to prepare the apprentice for each part of the end-point assessment
- a section focused on the end-point assessment method where the assessment criteria are presented in a format suitable for carrying out 'mock' assessments

Introduction

Standard overview

Passenger transport operatives work in a wide variety of settings that enable customers to travel on the public transport network. They work at stations or onboard trains, trams, buses and coaches.

The broad purpose of the occupation is to help customers travel to their destinations. Passenger transport operatives do this by helping customers travel safely, on time and in comfort from the beginning to the end of their chosen journey. Passenger transport operatives work within safety-critical environments. They provide high-quality services to customers, ensuring that safety, customer care and commercial standards are met. They assist other staff and identify customer needs, particularly during a disruption in service.

This apprenticeship takes a core and pathways approach. All apprentices will need to attain the core knowledge, skills and behaviours. Apprentices will also select one from either the ticketing, dispatch or onboard/station pathways.

Those who work in ticketing usually offer a full counter service at the station or depot. This can be quite pressurised, depending on the number of passengers. They offer specialist assistance with travel across the UK network. They must diagnose a customer situation and offer impartial advice on the appropriate travel solution, which can mean selling tickets beyond their own organisation's network. They may also be required to promote certain services.

Some passenger transport operatives instead work on board vehicles or within the station. They may be required to check tickets, and in some situations also sell a limited range of tickets. Their main responsibility is to keep the travel environment safe for all who use it. They must monitor and respond to live events, from passenger issues to delays.

Finally, dispatch operatives work on the platform. They receive, turn around and dispatch vehicles in line with set procedures. They also have to monitor and respond to activity happening within the station or platform, such as overcrowding. They have the power to stop a vehicle when required to maintain safety. These three occupations work together in teams to provide a seamless service that allows fare-paying passengers to safely access their chosen transport to their destination.

On-programme requirements

Although learning, development and on-programme assessment are flexible, and the process is not prescribed, the following is the recommended baseline expectation for an apprentice to achieve full competence in line with the Passenger Transport Operative apprenticeship standard.

The on-programme assessment approach will be agreed between the training provider and employer. The assessment will give an ongoing indication of an apprentice's

performance against the final outcomes defined in the standard. The training provider will need to prepare the apprentice for the end-point assessment, including preparation for the interview and collation of the portfolio of evidence (such as a provision of recordings of professional discussions or workplace evidence).

The training programme leading to end-point assessment should cover the breadth and depth of the standard using suggested on-programme assessment methods that integrate the knowledge, skills and behaviour components, and which ensure that the apprentice is sufficiently prepared to undertake the end-point assessment. Training, development and ongoing review activities should include:

- achievement of level 1 English and maths. If the apprentice began their apprenticeship training before their 19th birthday, they will still be subject to the mandatory requirement to study towards and achieve English and maths. The requirements for English and maths are optional for apprentices aged 19+ at the start of their apprenticeship training.
- completion of a portfolio through which the apprentice gathers evidence of their progress.

Portfolio of evidence

The apprentice must compile a portfolio of evidence during their time on-programme that is mapped against the knowledge, skills and behaviours (KSBs) assessed in the interview underpinned by a portfolio.

It will typically contain **10 discrete** pieces of evidence. Evidence may be used to demonstrate more than **one knowledge, skills or behaviour** as a qualitative approach is suggested as opposed to a quantitative approach.

Evidence sources may include:

- workplace documentation/records, for example, workplace policies/procedures, records
- witness statements (which may include customer feedback if applicable)
- annotated photographs
- video clips (maximum total duration of 10 minutes), where the apprentice must be in view and identifiable

This is not a definitive list and other evidence sources are possible. Given the breadth of context and roles in which this occupation works, the apprentice will select the most appropriate evidence based on the context of their practice against the relevant knowledge, skills and behaviours.

The portfolio should not contain any reflective accounts or any methods of self-assessment. Any employer contributions should focus on direct observation of performance (for example, witness statements) rather than opinions.

The portfolio must be accompanied by a portfolio matrix. This can be downloaded from our website. The portfolio matrix must be fully completed including a declaration by the employer and the apprentice to confirm that the portfolio is valid and attributable to the apprentice.

The portfolio of evidence must be submitted to Highfield at gateway. It is not directly assessed but underpins the interview.

Use of Artificial Intelligence (AI) in the EPA

Assessments must be carried out in accordance with the published assessment plan and all work submitted must be the apprentice's own. AI tools must not be used to generate evidence in their entirety or to replace the apprentice's own judgement, performance or competence. Any use of AI must be transparent, limited and properly referenced.

Where AI has been used by the apprentice as part of normal work activity (for example, drafting a document, worksheet or PowerPoint), this may form part of the portfolio provided that:

The apprentice has materially authored, verified and taken responsibility for the content.

- AI use is clearly declared and referenced within the work (include tool name, purpose and how outputs were verified)
- Source prompts, system settings and the portions influenced by AI are retained and available for review
- AI outputs must not substitute for authentic demonstration of competence against the standard

If an AI tool is used at any stage of an assessment method (for example, to prepare a presentation outline or to organise notes), its use must be fully referenced in the submission or assessor records, and must not compromise authenticity, validity or security. Assessors must be satisfied that decisions remain rooted in the apprentice's knowledge, skills and behaviours, and in direct evidence gathered through observation, questioning and professional discussion.

AI tools must not be used to produce assessment evidence end-to-end, to fabricate logs/records or to simulate performance.

Readiness for end-point assessment

In order for an apprentice to be ready for the end-point assessments:

- the apprentice must have achieved level 1 English and maths. The requirements for English and maths are mandatory for all apprentices aged between 16-18 at the

start of their apprenticeship training. The requirements for English and maths are optional for apprentices aged 19+ at the start of their apprenticeship training.

- the apprentice must have gathered a **portfolio of evidence** against the required elements to be put forward to be used as the basis for the interview
- the employer must provide Highfield with any workplace-specific policies and procedure requirements and or instructions at least two weeks in advance of the apprentice being assessed. For guidance, a list of examples has been provided below.
 - Shift handover procedure
 - Incident procedure
 - Complaints/enquiries policy or procedure
 - Use of systems and equipment
 - Onboard policy or procedure (Onboard pathway only)
 - Dispatch/turnaround procedure (Dispatch pathway only)

This list is not definitive. The policies and procedures may already be included as part of the portfolio of evidence.

- the line manager (employer) must be confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard and that the apprentice is competent in performing their role. To ensure this, the apprentice must attend a formal meeting with their employer to complete the Gateway Readiness Report.
- the apprentice and the employer should then engage with Highfield to agree a plan for each assessment activity to ensure all components can be completed within a **mandated** end-assessment window. Further information about the gateway process is covered later in this kit.

If you have any queries regarding the gateway requirements, please contact your EPA customer engagement manager at Highfield Assessment.

Order of end-point assessments

There is no stipulated order of assessment methods. This will be discussed with the apprentice, training provider and/or employer with our scheduling team when scheduling the assessments to ensure that the learner is provided with the best opportunity to attempt the assessment.

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The Highfield approach

This section describes the approach Highfield has adopted in the development of this end-point assessment in terms of its interpretation of the requirements of the end-point assessment plan and other relevant documents.

Observation with questions

Within the assessment plan on page 8, it states 'The independent assessor must use the full time available for questioning to allow the apprentice the opportunity to evidence occupational competence at the levels available'. However, it then also states 'As only naturally occurring work is observed, those KSBs that the apprentice did not have the opportunity to demonstrate can be assessed via questioning, although these should be kept to a minimum'. Therefore, Highfield's approach is where the apprentice has attempted the criteria, the end-point assessor may not require the full allocated time for the questions. Therefore, in this instance, 25 minutes may not be utilised.

On page 9 of the assessment plan, it states 'Each EPAO must develop a test specification'. Highfield's approach is that a question plan of sufficient size will be developed, and guidance on how to tailor these questions as appropriate to the learner. Highfield will also develop appropriate documentation for end-point assessors to record their assessment decisions. This will ensure that all learners receive a consistent approach to their end-point assessment.

Interview underpinned by portfolio

Page 10 of the assessment plan states 'The independent assessor's role is restricted to asking set questions'. However, it also states 'During this method, the independent assessor must combine questions from the EPAO's question bank and those generated by themselves in line with the EPAO's training and standardisation process'. Therefore, Highfield's approach is that assessors will be allowed to use a mix of questions from the question bank and their own questions. Highfield will develop a question bank of sufficient size, and guidance on how to tailor these questions as appropriate to the apprentice.

Grade criteria for the interview underpinned by portfolio

Within the assessment plan on page 16, it is stated 'In order to achieve a distinction, the apprentices must demonstrate all of the pass descriptors, all of the core distinction descriptors and all distinction descriptors for their option'. However, there are no distinction descriptors [criteria] for any of the pathways, only the core. Therefore, Highfield's approach is to achieve a distinction, the apprentice will need to demonstrate all of the pass criteria and all of the core distinction criteria.

Knowledge, skills and behaviours (KSBs) mapping to assessment criteria

Within the assessment plan on page 15, the ticketing operative and dispatch operative assessment criteria for the observation is displayed containing the same KSB mapping across both themes. Therefore, for consistency with the rest of the mapping and document formatting, we have mapped the KSBs to each piece of criteria.

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Gateway

How to prepare for gateway

After apprentices have completed their on-programme learning, they should be ready to pass through 'gateway' to their end-point assessment.

Gateway is a meeting that should be arranged between the apprentice, their employer and training provider to determine that the apprentice is ready to undertake their end-point assessment. The apprentice should prepare for this meeting by bringing along work-based evidence, including:

- customer feedback
- recordings
- manager statements
- witness statements

As well as evidence from others, such as:

- mid and end-of-year performance reviews
- feedback to show how they have met the apprenticeship standards while on-programme

In advance of gateway, apprentices will need to have completed the following. The requirements for English and maths listed below are mandatory for all apprentices aged between 16-18 at the start of their apprenticeship training. The requirements for English and maths listed below are optional for apprentices aged 19+ at the start of their apprenticeship training.

- Achieved level 1 English
- Achieved level 1 maths
- Submitted their workplace specific policies, requirements and or instructions as requested by Highfield
- Submitted a suitable portfolio of evidence to be used as the basis for the interview (see the Portfolio Matrix)

Therefore, apprentices should be advised by employers and providers to gather this evidence and undertake these qualifications during their on-programme training. It is recommended that employers and providers complete regular checks and reviews of this evidence to ensure the apprentice is progressing and achieving the standards before the formal gateway meeting is arranged.

The gateway meeting

The gateway meeting should be attended by the apprentice and a representative from the employer and training provider.

The **Gateway Readiness Report** should be used to log the outcomes of the meeting and agreed by all three parties. This report is available to download from the Highfield Assessment website.

The report should then be submitted to Highfield. If you require any support completing the Gateway Readiness Report, please contact your EPA customer engagement manager at Highfield Assessment.

Reasonable adjustments

Highfield Assessment has measures in place for apprentices who require additional support. Please refer to the Highfield Assessment Reasonable Adjustments Policy for further information/guidance.

ID requirements

Highfield Assessment will complete an identification check before starting any assessment and will accept the following as proof of an apprentice's identity:

- a valid passport (any nationality)
- a signed UK photocard driving licence
- a valid warrant card issued by HM forces or the police
- another photographic ID card, such as an employee ID card or travel card

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The Passenger Transport Operative apprenticeship standard

Below are the knowledge, skills and behaviours (KSBs) from the standard and related assessment criteria from the assessment plan. On-programme learning will be based upon the KSBs and the associated assessment criteria are used to assess and grade the apprentice within each assessment method.

Utilisation of tools (travel equipment/systems)		
Knowledge	Skills	Behaviours
K24 The different types of travel systems and equipment, their operating methods and techniques	S13 Utilise available equipment and systems in accordance with operational requirements	B1 Safety first mindset B2 Responsible for own actions B3 Passenger-focused mindset
Observation with questions		
Pass criteria		
UT1 Takes responsibility for own actions by checking applicable travel related systems and equipment are working correctly in line with operational requirements. Adapts use of systems and equipment to meet customer needs. Monitors the working environment to ensure it is safe and secure. (K24, S13, B1, B2, B3)		
Amplification and Guidance		
<ul style="list-style-type: none"> • Different types of travel systems may include: <ul style="list-style-type: none"> ○ scheduled fixed-route systems - local bus routes, rail networks ○ long-distance services - coach or mainline rail ○ pre-booked transport services ○ integrated transport systems where services connect - bus to rail interchanges ○ station or terminal-based systems - gate lines, platforms, boarding procedures 		

- **Equipment and systems:**
 - ticketing systems – payment devices, card readers, ticket machines (Zebra)
 - passenger information systems – timetable and digital displays
 - communication systems – radios, messaging systems
 - safety and security equipment – CCTV, emergency alarms
 - revenue protection equipment
 - accessibility equipment

- **Safety first mindset** – proactively keeping an eye out for safety issues or considering safety issues first when making a decision. This may include:
 - ensuring the Platform Train Interface (PTI) is clear before giving the signal to close doors
 - carrying out regular health and safety checks in the train or station

- **Passenger-focused mindset** – objectively looking at any situation and evaluating it to the benefit of the passenger. This may include:
 - in the case of delays
 - identifying any actions that could be taken to lessen the effect of the delays
 - alternative connections or extending the original ticket

Communication methods		
Knowledge	Skills	Behaviours
K22 Techniques for communicating information using various methods appropriate to the audience	S12 Select from a range of communication methods to tailor messages to the audience	B4 Respectful and supportive of others B6 Acts professionally in line with expectations
Observation with questions		
Pass criteria		
CM1 Supports the customer by adapting their communication style to the circumstances and checks the customer has understood, whilst maintaining professionalism. (K22, S12, B4, B6)		
Amplification and Guidance		
<ul style="list-style-type: none"> • Techniques for communicating may include: <ul style="list-style-type: none"> ○ verbal communication – face-to-face conversations and announcements ○ non-verbal communication – gestures and body language ○ written communication – signage and notices ○ electronic communication – text alerts and apps ○ using active listening ○ responding appropriately • Methods appropriate to the audience: <ul style="list-style-type: none"> ○ select a communication method that is appropriate to the situation, recipient and environment ○ consider the individual’s needs, abilities and circumstances ○ adapt tone, pace and language to suit the situation ○ examples may include: <ul style="list-style-type: none"> ▪ speaking clearly to visually impaired passengers ▪ using simple and clear language when giving instructions to children 		

Directing passenger techniques

Knowledge	Skills
K21 Techniques for directing passengers , for example through underground and overground networks	S10 Diagnose passenger related issues to provide accurate advice and support
Observation with questions	
Pass criteria	
DP1 Responds to passenger related queries, by providing accurate directions, support or advice (K21, S10)	
Amplification and Guidance	
<ul style="list-style-type: none"> • Techniques for directing passengers: <ul style="list-style-type: none"> ○ provide accurate and clear instructions ○ use easy-to-follow language ○ using hand gestures where appropriate ○ give step-by-step directions where necessary ○ refer to landmarks, platform numbers and signage ○ adjust directions based on passenger needs ○ remain calm during busy and disruptive periods • Diagnose passenger related issues by: <ul style="list-style-type: none"> ○ identifying what problem the passenger is experiencing ○ asking the passenger questions and listening carefully to their response ○ checking relevant systems or information sources ○ recognising common passenger issues ○ confirming the issue before providing advice and a solution ○ escalating the issue to a supervisor or emergency services if necessary 	

Preparing for work

Skills

S2 Prepare own work area to support safe and efficient delivery of transport services

S7 Prepare for your next shift in accordance with operational requirements and own organisations procedures

Interview underpinned by portfolio

Pass criteria

PW1 Outlines the steps they take when preparing their own work area for use during a shift. Explains how their approach to work ensures they meet own **organisations safety and efficiency requirements**. (S2, S7)

Distinction criteria

PW2 Explains how they have incorporated lessons learnt into preparing their own work area and how this enhanced safety or efficiency. (S2, S7)

Amplification and Guidance

- **Prepare own work area by:**
 - making sure the immediate working environment is safe and organised
 - carrying out pre-start checks
 - ensuring required equipment is present, functional and set up correctly
 - checking safety equipment is in place and accessible
 - confirming signage and passenger information displays are visible and accurate
 - logging into relevant operational systems before service begins
 - ensuring personal presentation and required identification meet organisational standards

- **Prepare for your next shift by:**
 - reviewing shift details in advance
 - checking any updates or communications from the organisation
 - confirming uniform and personal protective equipment (PPE) are clean and present
 - reviewing any handover information from the previous shift where applicable

- familiarising yourself with any temporary operational requirements
- **Organisations safety and efficiency requirements** – the standards, procedures and methods of work laid down by the employer

Legislative, procedural and operator requirements

Knowledge	Skills
<p>K1 The principles of identifying and complying with relevant legislation/procedures that impacts the transport environment and its operation</p> <p>K2 The importance of compliance and potential consequences of noncompliance when working in a regulated travel environment</p> <p>K4 Principles for ensuring health and safety in a regulated travel environment</p>	<p>S1 Maintain safe and compliant working practices and travel environments, in accordance with regulation and organisational requirements</p> <p>S11 Educate passengers to keep safe within the travel environment</p>
Interview underpinned by portfolio	
Pass criteria	Distinction criteria
<p>LP1 Outlines the relevant legislation/procedures and health and safety regulations that apply in the travel environment and the impact that they have on operations. (K1, K2, K4, S1, S11)</p> <p>LP2 Describes how they observe safe and compliant working practices and educate passengers to keep travel environments safe, whilst adhering to regulation and organisational requirements. Provides at least two different risks associated with noncompliance. (K1, K2, K4, S1, S11)</p>	<p>LP3 <i>Reflects on the importance of compliance with regulations and the impact this has had in the travel environments they work in. (S1, S11)</i></p>

Amplification and Guidance

- **Relevant legislation/procedures:**
 - Health and Safety at Work etc. Act
 - Management of Health and Safety at Work Regulations
 - Equality Act
 - Public Service Vehicles (Accessible Information) Regulations
 - Public Passenger Vehicles Act
 - Road Traffic Act
 - Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR)
- **Transport environment** may include:
 - onboard vehicles
 - stations or depots
 - platforms
 - interchanges and travel hubs
 - ticketing areas
 - passenger areas
- **Potential consequences of noncompliance** may include:
 - legal action against the individual or company, such as fines and prosecution
 - increased risk of accidents and fatalities to both passengers and staff
 - service disruptions
 - poor passenger experiences and complaints leading to reputational damage
 - financial loss
- **Regulated travel environment** – trains, stations and buses regulated by the Office of Rail and Road (ORR)
- **Educate passengers to keep safe** by:
 - providing clear guidance and instructions to passengers

- explaining safety procedures in a calm and professional manner
- reminding passengers of rules
- directing passengers to use facilities correctly
- advising passengers to stand behind safety lines or remain seated while the vehicle is moving
- highlighting emergency procedures where appropriate
- challenging unsafe behaviour respectfully

Customer diversity and customer requirements

Knowledge	Skills
<p>K13 Identifying the signs of passenger/public vulnerability</p> <p>K14 Safeguarding principles</p> <p>K15 Techniques for engaging potentially vulnerable passengers/public</p> <p>K16 The range of services available to support vulnerable people and how to signpost</p> <p>K17 Techniques for identifying and responding to vulnerable passengers who may need assistance</p> <p>K20 The diverse range of passengers who may access transport services; their needs, rights and expectations</p>	<p>S4 Identify passenger/public behaviour that indicates vulnerability and respond to help keep them safe</p> <p>S8 Assist vulnerable passengers who require help, using specialised equipment or systems where necessary</p>
Interview underpinned by portfolio	
Pass criteria	Distinction criteria
<p>DR1 Outlines the diverse types of customers who may use transport services. Describes their individual needs, rights and expectations whilst accessing transport services. (K13, K14, K15, K16, K17, K20, S4, S8)</p>	<p>DR4 <i>Identifies the impact of failing to address the diverse needs of customers. (K20)</i></p>

<p>DR2 Describes how they identify vulnerable people and respond to promote their safety, outlining the relevant safeguarding principles. (K13, K14, K15, K16, K17, K20, S4, S8)</p> <p>DR3 Describes how they assist vulnerable people with specialised equipment or systems to support their use of travel services. (K13, K14, K15, K16, K17, K20, S4, S8)</p>	
Amplification and Guidance	
<ul style="list-style-type: none"> • Signs of passenger/public vulnerability may include: <ul style="list-style-type: none"> ○ appearing confused or unsure about the environment ○ showing visible signs of distress, such as crying ○ displaying physical frailty or mobility difficulties ○ showing signs of intoxication or under the influence of drugs ○ demonstrating difficulty understanding information and communicating • Safeguarding principles – protecting a passenger’s health, wellbeing and human rights, for example, checking on young children travelling alone • Range of services available to support vulnerable people: <ul style="list-style-type: none"> ○ Pre-booked services to support passengers with boarding and alighting ○ Station staff support ○ Intercom points on platforms ○ Accessibility support ○ British Transport Police (BTP) • Signpost – assisting and directing a passenger to information that best meets their needs, for example, directing a passenger with additional needs to the passenger assist team • Diverse range of passengers – variety of people who use transport services and who may have different needs, such as: <ul style="list-style-type: none"> ○ different passenger age groups 	

- disabled passengers
- passengers with mobility and sensory impairments
- passengers with learning disabilities
- passengers from different cultural and religious backgrounds
- vulnerable passengers

- Passenger **rights** may include:
 - the right to be informed
 - the right to choose
 - the right to safety
 - the right to be heard
 - the right to have problems corrected
 - the right to consumer education
 - the right to service

- **Specialised equipment** – self-contained unit configured for a specific purpose, for example, a ramp which is used to assist passengers alighting and disembarking on and off trains

Identifying possible incidents and responding to incidents/emergencies

Knowledge	Skills
<p>K3 The routine checks required to ensure a safe and secure working environment</p> <p>K5 Techniques for identifying the wider organisational response to live incidents, for instance establishing how other stations are responding to mechanical breakdown, and how your own work contributes</p>	<p>S5 Respond to incidents and emergency situations in line with requirements</p> <p>S6 Identify potential incidents, breaches of security and emergency situations, and take appropriate action to ensure safety</p>

<p>K6 Reporting accidents/incidents</p> <p>K7 Own responsibilities when responding to an emergency, disruption or other incident impacting any aspect of the passenger transport network</p> <p>K11 Techniques and procedures for managing suspicious/threatening activity</p>	
Interview underpinned by portfolio	
Pass criteria	Distinction criteria
<p>IE1 Describes how they respond to a sudden event impacting the passenger transport network (either an incident, emergency or disruption). Outlines the procedural steps they followed when reporting the incident in line with requirements. (K3, K5, K6, K7, K11, S5, S6)</p> <p>IE2 Explains the checks and actions they are required to undertake to determine their response to issues, such as possible incidents, security breaches and emergencies. (K3, K5, K6, K7, K11, S5, S6)</p> <p>IE3 Outlines the approaches they take to manage suspicious/threatening activity. Describes ways to identify wider organisational response to live incidents. (K3, K5, K6, K7, K11, S5, S6)</p>	<p><i>IE4 Reflects on the importance of adhering to requirements when reporting accidents/incidents. (K6, S5)</i></p>
Amplification and Guidance	
<ul style="list-style-type: none"> • Routine checks – regular inspections carried out on railway stations, platforms and infrastructure to ensure a safe environment for staff and passengers, for example: <ul style="list-style-type: none"> ○ daily pre-shift safety checks completed before starting ○ visual inspections of work areas, such as vehicles and platforms ○ checking that communication systems are working 	

- **Organisational response** – a reaction to a given situation by the company, for example, check the company website, app or emails to identify action being taken on a particular incident
- **Reporting accidents/incidents:**
 - inform the appropriate individual or team
 - make sure the situation is made safe
 - record details accurately following company processes and documentation
 - escalate serious incidents immediately
- **Suspicious/threatening activity** – someone or something which has an aspect that makes you think that they are involved in a crime or a dishonest activity, for example:
 - a package left unattended on a platform
 - passengers refusing to follow instructions
 - people acting aggressively or threatening people
 - signs of vandalism

Working in differing conditions and supporting others

Knowledge	Skills	Behaviours
<p>K8 Required passenger conduct in a safety critical environment</p> <p>K9 Techniques for managing inappropriate passenger/public behaviour</p> <p>K10 Principles of conflict management</p> <p>K12 The procedures for responding to the impact of criminal activity on the transport network,</p>	<p>S3 Recognise and manage inappropriate passenger/public activity to maintain the integrity of the transport service</p>	<p>B5 Resilient in challenging & fast-changing travel situations</p>

<p>including the reporting processes and stakeholders involved</p> <p>K23 The range of roles and responsibilities that work together to deliver effective transport services</p>		
Interview underpinned by portfolio		
Pass criteria	Distinction criteria	
<p>DC1 Outlines approaches to conflict management and states how they utilised these techniques to address inappropriate passenger/public behaviour. (K8, K9, K10, K12, K23, S3, B5)</p> <p>DC2 Describes the different internal and external stakeholders that must work together to provide safe and effective transport services. (K8, K9, K10, K12, K23, S3, B5)</p> <p>DC3 Describes expected customer conduct in a safety critical environment. Describes different ways in which criminal activity can adversely impact transport services. Outlines the reporting procedures to follow when identifying such activity. (K8, K9, K10, K12, K23, S3, B5)</p> <p>DC4 Describes a time when they demonstrated resilience when handling a fast-changing situation involving unacceptable customer behaviour. Explains how their actions helped maintain the integrity of the transport service. (K8, K9, K10, K12, K23, S3, B5)</p>	<p>DC5 <i>Explains the balance between passengers own responsibilities for behaving appropriately, and their own role in managing behaviours.</i> (K8)</p>	
Amplification and Guidance		
<ul style="list-style-type: none"> • Required passenger conduct: <ul style="list-style-type: none"> ○ following instructions provided by transport staff for safety ○ behaving in a manner that doesn't cause harm to themselves, staff or other passengers 		

- remaining behind safety lines on the platform
- keeping exits and aisles clear
- not entering restricted areas
- following safety signage and announcements

- **Techniques for managing inappropriate passenger/public behaviour** may include:
 - staying calm and professional
 - communicating confidently and clearly
 - using de-escalation techniques
 - escalating serious incidents appropriately, such as informing the British Transport Police
 - following procedures for refusing service where permitted
 - keeping a safe distance and maintaining personal safety

- **Conflict management** – the process of being able to identify and handle conflicts sensibly, fairly and efficiently, for example, if two passengers are fighting, split them up and move them to separate carriages

- **Responding to the impact of criminal activity on the transport network:**
 - recognising signs of criminal activity
 - prioritising personal and passenger safety
 - reporting the incident immediately to a supervisor, control or British Transport Police
 - not intervening physically unless authorised
 - providing clear details
 - supporting affected passengers where appropriate
 - completing required incident reports in line with procedures

- **Roles and responsibilities that work together:**
 - ticketing operatives
 - onboard staff
 - dispatch/platform staff
 - drivers/train crew

- station operatives
- control room/operations staff
- customer service teams
- security staff/British Transport Police
- maintenance/engineering teams
- cleaning teams
- signaller

Performance standards	
Knowledge	Skills
<p>K18 How delayed travel services can adversely impact the passenger and other affected stakeholders</p> <p>K19 Expected performance standards and how own role contributes to wider commercial success of the organisation</p>	<p>S9 Respond to enquiries and complaints in line with expected own organisation requirements</p>
Interview underpinned by portfolio	
Pass criteria	Distinction criteria
<p>PS1 Outlines different ways in which a delayed travel service can impact customers and other stakeholders. (K18, K19, S9)</p> <p>PS2 Describes how their performance is measured at work, and how their role contributes to organisational success. (K18, K19, S9)</p> <p>PS3 Describes how they handle and resolve complaints in line with their own organisational requirements. (K18, K19, S9)</p>	<p>PS4 Suggests different ways to mitigate the impact of delayed travel services on customers. (K18, K19, S9)</p> <p>PS5 Evaluates how the current complaints process could be improved to reduce complaints in own organisation. (K18, K19, S9)</p>

Amplification and Guidance

- **How delayed travel services can adversely impact the passenger:**
 - causes passengers to miss connecting travel arrangements
 - leads to late arrival to the destination such as work, appointments or events
 - creates stress and anxiety
 - extends journey times
 - causes financial loss and issues
 - reduces confidence in the transport service

- **Respond to enquiries and complaints:**
 - pay attention to what the passenger is querying or reporting
 - respond in a calm and professional manner
 - provide accurate information based on the enquiry, if unsure direct them to an individual that can support them or acquire the information
 - ask appropriate questions to gather more information
 - follow organisation's procedures for recording and escalating issues

Ticketing Operative

Supporting customer journey planning	
Knowledge	Skills
<p>K25 The national travel network and range of available tickets</p> <p>K27 Techniques for diagnosing passenger travel requirements, for example establishing the number and composition of passengers, destination and any specific support needs</p> <p>K28 The principles of route planning</p> <p>K29 The principles of offering a travel solution that is in the passengers best interests and without bias to any one particular supplier</p>	<p>S14 Recommend an impartial travel solution balancing the passengers circumstances with potential routes, network operations, and available tickets</p> <p>S15 Promote the benefits of products and services to eligible passengers</p>
Observation with questions	
Pass criteria	
<p>JP1 Promotes the range of tickets, products and services available across the national travel network, matching products to the needs of the customer(s). Explains viable options while remaining impartial. Uses questioning techniques, to establish the route from embarkation to destination. (K25, K27, K28, K29, S14, S15)</p>	
Amplification and Guidance	
<ul style="list-style-type: none"> • Range of available tickets may include: <ul style="list-style-type: none"> ○ single and return tickets ○ day tickets and travelcards ○ season tickets for regular travellers ○ advance tickets ○ off-peak and peak tickets 	

- anytime/flexible tickets
- group and family tickets
- child tickets and concessionary fares
- discounted tickets linked to railcards or other entitlement schemes
- multi-journey tickets
- smartcard or mobile app tickets
- tickets with restrictions

- **Techniques for diagnosing passenger travel requirements:**
 - asking questions to find out what the passenger needs before offering a ticket
 - confirming key journey details
 - establishing the number of passengers travelling
 - using timetables and ticketing systems to confirm the best option

- **Route planning** typically involves:
 - identifying the suitable route for a passenger and selecting this based on their needs/priorities
 - checking direct services and possible connections
 - considering journey and waiting times
 - considering accessibility needs
 - reviewing service disruptions

- **Offering a travel solution** by giving objective travel advice that helps the passenger make an informed choice, for example:
 - explaining the advantages and disadvantages of each option
 - providing travel advice that is unbiased and focused on the passenger's travel needs
 - recommending the most suitable ticket and route based on passenger details
 - avoiding favouring a specific travel operator

- **Remaining impartial** – not favouring one side or another, for example, giving a customer a route or ticket that benefits them where an alternative could have benefited the train operating company

Cash handling	
Knowledge	Skills
K31 Cash handling regulations	S17 Handle cash in accordance with regulations
K32 Principles of balancing sales records	S18 Account for the balance of payments during your shift
Observation with questions	
Pass criteria	
CH1 Handles any cash in accordance with regulations and balances sales records. (K31, K32, S17, S18)	
Amplification and Guidance	
<ul style="list-style-type: none"> • Principles of balancing sales records: <ul style="list-style-type: none"> ○ checking that all ticket sales recorded match the money taken during the shift ○ verifying totals for each payment method, such as card and cash ○ counting cash and confirming it matches the recorded amount ○ ensuring refunds and discounts have been processed correctly ○ identifying and raising discrepancies between sales records and takings 	

Promoting sales

Knowledge	Skills
K26 The range of products and services available for sales or promotion K30 The techniques used for sales and promotion	S16 Determine and sell appropriate products and services to passengers
Interview underpinned by portfolio	
Pass criteria	Distinction criteria
PM1 Outlines the different techniques used when promoting sales for a range of products and services. Describes a time when they successfully used one or more techniques to sell a product or service and explains why it was appropriate. (K26, K30, S16)	<i>No distinction criteria</i>
Amplification and Guidance	
<ul style="list-style-type: none"> • Range of products and services available: <ul style="list-style-type: none"> ○ different types of tickets available for sale - single, return, day, weekly, season tickets ○ advance purchase, off-peak and peak ticket options ○ first class or standard class travel options ○ discounted tickets - railcards, student discounts, child fares ○ group travel tickets or family tickets ○ smartcards, travel passes or contactless travel products • Techniques used for sales: <ul style="list-style-type: none"> ○ using questions to understand the passenger's travel needs ○ actively listening to identify opportunities for sales ○ understanding and explaining product benefits clearly ○ using upselling techniques where appropriate 	

- informing passengers of current promotions and sales

Onboard or Station Operative

Monitoring the passenger services in accordance with operator requirements	
Knowledge	Skills
K33 How to maintain high quality passenger services in line with organisational requirements	S19 Identify and respond to passenger service requirements , for example degraded operations
Observation with questions	
Pass criteria	
OS1 Monitors the passenger travel service environment, identifying both actual and potential issues, taking action to maintain the integrity of the travel service in line with organisational requirements. (K33, S19)	
Amplification and Guidance	
<ul style="list-style-type: none"> • Maintain high quality passenger services: <ul style="list-style-type: none"> ○ deliver consistent professional customer service at all times ○ provide accurate travel information ○ be approachable and willing to help passengers ○ support passengers with additional needs ○ manage complaints and conflict calmly ○ communicate delays and disruptions to passengers in a timely manner ○ maintain a clean and safe onboard or station environment • Passenger service requirements may include: <ul style="list-style-type: none"> ○ travel information ○ help with routes and connections ○ support with ticket queries ○ assistance for passengers with additional needs 	

- guidance during degraded operations

Checking tickets

Knowledge	Skills
K34 Own limits, authority, and responsibility with regards to ticket checks K35 The process for on-board checking of tickets and how to respond	S20 Carry out ticket checks within limits of responsibility & when practical to do so
Interview underpinned by portfolio	
Pass criteria	
CT1 Outlines their own limits and responsibilities for checking tickets. (K34, K35, S20) CT2 Outlines how they check a passenger has a correct ticket and describes a range of options for handling non-compliance in line with organisational requirements. (K34, K35, S20)	<i>No distinction criteria</i>
Amplification and Guidance	
<ul style="list-style-type: none"> • Responsibility with regards to ticket checks: <ul style="list-style-type: none"> ○ ensuring passengers have a valid ticket ○ thoroughly checking tickets - date, time, route, class ○ verifying railcards, passes or discounts ○ using ticket inspection equipment ○ challenging invalid tickets ○ issuing fares and penalties • Process for on-board checking of tickets: 	

- select an appropriate time and location to start checks, such as once the vehicle is moving
 - work through the vehicle to ensure all passengers are checked
 - check tickets for validity
 - scan or visually inspect tickets using equipment
 - record ticket check outcomes if required
 - follow organisational procedures for passengers that have no ticket or an invalid ticket
- **Non-compliance** refers to an individual's failure to act within stated boundaries or refusal to comply with such regulations or rules, for example, where a passenger's ticket does not cover the full length of the journey, issuing an excess fare ticket

Dispatch Operative

Monitoring safety in a live transportation environment	
Knowledge	
K37	The wider considerations and factors that contribute to a safe dispatch environment , for example platform/station crowd control, disruption to services, potential dispatch irregularities
Observation with questions	
Pass criteria	
LT1	Acts upon environmental factors that could risk safety to those using the transport service. (K37)
Amplification and Guidance	
	<ul style="list-style-type: none">• Considerations and factors that contribute to a safe dispatch environment:<ul style="list-style-type: none">○ platform or station layout○ crowd control○ passenger behaviours○ accessibility needs○ weather conditions○ equipment functionality○ service disruption or delays○ staffing levels

Receiving and dispatching transport services into the station

Knowledge	Skills
K36 The procedures for the safe arrival and dispatch of transport in line with own organisations requirements	S22 Receive and dispatch services in line with procedures and prevailing circumstances
Observation with questions	
Pass criteria	
RD1 Receives and dispatches transport services (e.g., train, tram, bus, coach) in line with organisational procedures and within limits of own role. (K36, S22)	
Amplification and Guidance	
<ul style="list-style-type: none"> • Procedures for the safe arrival and dispatch of transport may differ for each individual station but will typically include: <ul style="list-style-type: none"> ○ preparing the platform before arrival ○ monitoring the approach and arrival of the vehicle and maintaining safe platform conditions ○ checking the vehicle is stopped in the right position ○ managing passenger flow during alighting and boarding ○ confirming dispatch safety checks are complete ○ ensuring correct signalling/dispatch authority is followed ○ communicating with the driver and control ○ confirming train's tail/rear lights are on • Prevailing circumstances – a fact or condition connected with or relevant to an event or action, which could affect the safe dispatch of a train, for example, poor weather (snow, rain or sunshine) at the time of dispatch • Organisational procedures – policies and procedures that provide guidelines for decision-making and the way this works in the dispatch process, for example, the Platform Train Interface (PTI) should be clear before the signal to close the train doors is given 	

Vehicle turnaround and emergencies

Knowledge	Skills
<p>K38 The methods and reasons for stopping a vehicle within the station confines during an emergency</p> <p>K39 The procedures for transport service turnaround</p>	<p>S21 Ready the service for turnaround in line with procedures</p> <p>S23 Stop a vehicle to reduce the risk to those potentially affected by an emergency situation</p>
Interview underpinned by portfolio	
Pass criteria	Distinction criteria
<p>VT1 Explains how they have stopped a vehicle in an emergency situation to reduce risk to those impacted by the emergency, outlines the procedures and rationale involved in reaching this decision. (K38, S23)</p> <p>VT2 Describes how they prepare (ready) a transport service for turnaround in line with organisational requirements. (K39, S21)</p>	<p><i>No distinction criteria</i></p>
Amplification and Guidance	
<ul style="list-style-type: none"> • Reasons for stopping a vehicle may include: <ul style="list-style-type: none"> ○ to prevent injury to passengers or staff ○ in response to a fire ○ if there is a security threat ○ if a passenger becomes ill or injured ○ system or signalling failure • Transport service turnaround – trains arrive at one platform and all remaining passengers get off. The train continues, running empty stock around the loop and runs into another platform at the same station. After which the train is then readied for service departing from that platform. 	

- **Ready the service for turnaround:**
 - ensure all passengers have disembarked
 - confirm the vehicle is safe to remain in the platform/station
 - conduct visual safety checks and check there is no unattended or lost property
 - reset onboard systems where necessary
 - check the next route and destination is correctly displayed

- **Stop a vehicle:**
 - use the correct dispatch methods to prevent departure
 - apply station emergency procedures to stop the vehicle if it is about to depart or moving slowly
 - alert the driver using appropriate communication methods
 - ensure the stop is carried out safely for passengers and those on the platform
 - maintain control of the platform area while the situation is managed

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Assessment summary

The end-point assessment for the Passenger Transport Operative apprenticeship standard is made up of two assessment methods:

1. A 50-minute observation followed by 25 minutes for questions
2. A 60-minute interview underpinned by portfolio

As an employer/training provider, you should agree a plan and schedule with the apprentice to ensure all assessment components can be completed effectively.

Each component of the end-point assessment will be assessed against the appropriate criteria laid out in this kit, which will be used to determine a grade for each individual. The grade will be determined using the combined grades.

Observation with questions

All assessment methods are weighted equally. The observation is graded at pass only. Apprentices will be marked against the pass criteria outlined in this kit.

- To achieve a **pass**, apprentices must achieve all of the pass criteria
- **Unsuccessful** apprentices will not have achieved all of the pass criteria

The observation with questions should normally take place in the apprentice's workplace.

Interview underpinned by portfolio

All assessment methods are weighted equally. Apprentices will be marked against the pass and distinction criteria outlined in this kit.

- To achieve a **pass**, apprentices must achieve all pass criteria
- To achieve a **distinction**, apprentices must achieve all pass criteria, all core distinction criteria and all distinction criteria for their pathway
- **Unsuccessful** apprentices will not have achieved all of the pass criteria

The interview may be conducted using technology such as video link, as long as fair assessment conditions can be maintained.

Grading

The apprenticeship includes pass and distinction grades, with the final grade based on the apprentice's combined performance in each assessment method.

To achieve a pass, the apprentice is required to pass both of the assessment methods.

To achieve a distinction, the apprentice must achieve a pass in the observation and a distinction in the interview underpinned by portfolio.

The overall grade for the apprentice is determined using the matrix below:

Observation with questions	Interview underpinned by portfolio	Overall grading
Fail	Any grade	Fail
Any grade	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Distinction

Retake and resit information

Apprentices who fail one or more assessment method(s) will be offered the opportunity to take a resit or a retake at the employer's discretion. The apprentice's employer will need to agree that either a resit or retake is an appropriate course of action. If a resit is chosen, please call the Highfield scheduling team to arrange the resit. If a retake is chosen, the apprentice will require a period of further learning and will need to complete a retake checklist. Once this is completed, please call the Highfield scheduling team to arrange the retake.

A resit is typically taken within one month of the EPA outcome notification. The timescale for a retake will be dependent on how much retraining is required and is typically taken within two months of the EPA outcome notification.

When undertaking a resit or retake, the assessment method(s) will need to be reattempted in full, regardless of any individual assessment criteria that were passed on any prior attempt. The EPA Report will contain feedback on areas for development and resit or retake guidance.

All failed assessment methods must be resat/retaken within a five month period from the EPA outcome notification, otherwise the entire EPA will need to be resat/retaken.

Apprentices should have a supportive action plan to prepare for the resit/retake.

Apprentices who achieve a pass grade cannot resit or retake the EPA to achieve a higher grade.

Where any assessment method has to be resat or retaken, the apprentice will be awarded a maximum EPA grade of pass, unless there are exceptional circumstances that are beyond the control of the apprentice as determined by Highfield.

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Assessing the observation with questions

The observation must be of an apprentice completing their usual work and simulation is not permitted. Apprentices must be observed by the assessor completing work under normal working conditions.

The observation with questions must take **75 minutes**. The observation must take **50 minutes**, followed by **25 minutes** allocated for questions. The independent assessor has the discretion to increase the time of the observation by up to 10% to allow the apprentice to complete a task or respond to a question.

The observation with questions may not be split, other than to allow comfort breaks as necessary or to allow the apprentice to move from one location to another as required. Where breaks occur, they will not count towards the total assessment time.

The assessor will brief the apprentice on the format of the observation with questions, including the timescales that they will be working to, before the start of the observation. The time taken for this briefing is not included in the assessment time.

The independent assessor may observe only one apprentice at any one time to ensure quality and rigour. The independent assessor must be unobtrusive while conducting the observation and questions will be left until the end.

The following activities should be observed during the observation, with apprentices undertaking all core activities, plus those related to their chosen pathway.

Core observation requirements for ALL apprentices:

- utilisation of tools (travel equipment/systems)
- communication methods
- directing passenger techniques

Pathway specific requirements

In addition to the core activities, apprentices should be observed undertaking the following activities from one of the below pathways:

Ticketing Operative:

- supporting customer journey planning
- cash handling

Onboard or Station Operative:

- taking action to maintain the passenger services in accordance with operator requirements

Dispatch Operative:

- monitoring safety in a live transportation environment such as a train, bus, tram or coach station
- receiving and dispatching transport services into the station

As only naturally occurring work is observed, those KSBs that the apprentice did not have the opportunity to demonstrate can be assessed via questioning, although these should be kept to a minimum.

Questions must be asked at the end of the observation. The assessor will ask a minimum of **five questions**.

The observation with questions should normally take place in the apprentice's workplace. The employer should ensure the necessary tools, equipment and materials are available for the apprentice during the observation with questions. The nature of the workplace will vary from major transport hubs through to quieter branch line stations. It is the responsibility of the assessor to ensure the chosen venue provides the apprentice with sufficient opportunity to demonstrate all pass criteria. If the chosen venue is not the apprentice's workplace, the assessor must allow the apprentice time to familiarise themselves with the environment.

Before the assessment

Employers/training providers should:

- provide the apprentice with information on the format of the observation, including the timescales they will be working to. This time is exclusive of the assessment time.
- ensure the apprentice knows the date, time and location of the assessment.
- ensure the apprentice knows which passenger transport operative criteria will be assessed (outlined on the following pages).
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard and identify real-life examples.
- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience as preparation for this assessment.

Grading the observation with questions

The observation with questions is graded at a pass only. Apprentices will be marked against the pass criteria included in the tables on the following pages (under 'Observations with questions criteria').

- To achieve a **pass**, apprentices must achieve all of the pass criteria
- **Unsuccessful** apprentices will not have achieved all of the pass criteria

Observation with questions mock assessment

It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment. Highfield recommends that the apprentice experiences a mock observation with questions in advance of the end-point assessment, with the training provider/employer giving feedback on any areas for improvement.

In designing a mock assessment, the employer/training provider should include the following elements in its planning:

- the mock observation with questions should take place in a suitable location.
- a 75-minute time slot should be available for the observation with questions, if it is intended to be a complete mock observation with questions covering all relevant standards (outlined in the following pages). However, this time may be split up to allow for progressive learning.
- consider a video or audio recording of the mock observation with questions and allow it to be available to other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock observation with questions with each apprentice.
- ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice to complete the learning experience. Mock assessment sheets are available to download from the Highfield Assessment website and may be used for this purpose.
- use five structured, 'open' questions that do not lead the apprentice but allows them to give examples for how they have met each area in the standard. For example:
 - utilisation of tools (travel equipment/systems)
 - Describe how you monitor the working environment to ensure it remains safe and secure.
 - communication methods
 - Provide examples of where you have adjusted your communication style to better support a customer.
 - directing passenger techniques
 - Explain how you ensure that the directions provided to customers are accurate and helpful.
 - ticketing operative – supporting customer journey planning
 - Provide an example of a situation where you offered different options and how you ensured the customer made an informed choice.
 - onboard or station operative – monitoring the passenger service in accordance with operator requirements

- Explain how you monitor the onboard travel service environment to identify both actual and potential issues.
- dispatch operative - monitoring safety in a live transportation environment
 - Can you provide an example of a potential safety issue you have encountered?

Observation with questions criteria

Throughout the **75-minute** observation with questions, the assessor will review the apprentice's competence in the criteria outlined below.

Apprentices should prepare for the observation with questions by considering how the criteria can be met.

Utilising of tools (travel equipment/systems)

To pass, the following must be evidenced.

UT1 Takes responsibility for own actions by checking applicable travel related systems and equipment are working correctly in line with operational requirements. Adapts use of systems and equipment to meet customer needs. Monitors the working environment to ensure it is safe and secure. (K24, S13, B1, B2, B3)

Communication methods

To pass, the following must be evidenced.

CM1 Supports the customer by adapting their communication style to the circumstances and checks the customer has understood, whilst maintaining professionalism. (K22, S12, B4, B6)

Directing passenger techniques

To pass, the following must be evidenced.

DP1 Responds to passenger related queries, by providing accurate directions, support or advice. (K21, S10)

Ticketing Operative

Supporting customer journey planning

To pass, the following must be evidenced.

JP1 Promotes the range of tickets, products and services available across the national travel network, matching products to the needs of the customer(s). Explains viable options while remaining impartial. Uses questioning techniques, to establish the route from embarkation to destination. (K25, K27, K28, K29, S14, S15)

Cash handling

To pass, the following must be evidenced.

CH1 Handles any cash in accordance with regulations and balances sales records. (K31, K32, S17, S18)

Onboard or Station Operative

Monitoring the passenger services in accordance with operator requirements

To pass, the following must be evidenced.

OS1 Monitors the passenger travel service environment, identifying both actual and potential issues, taking action to maintain the integrity of the travel service in line with organisational requirements. (K33, S19)

Dispatch Operative

Monitoring safety in a live transportation environment

To pass, the following must be evidenced.

LT1 Acts upon environmental factors that could risk safety to those using the transport service. (K37)

Receiving and dispatching transport services into the station

To pass, the following must be evidenced.

RD1 Receives and dispatches transport services (e.g., train, tram, bus, coach) in line with organisational procedures and within limits of own role. (K36, S22)

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Assessing the interview underpinned by portfolio

The interview underpinned by a portfolio must last for **60 minutes**. The assessor has the discretion to increase the time of the interview by up to 10% to allow the apprentice to complete their last answer.

The interview underpinned by portfolio will have a minimum of **10 questions**. Additional follow-up questions are allowed to seek clarification and to make a judgement against the grading descriptors.

The interview underpinned by portfolio must be appropriately structured to draw out the best of the apprentice's competence and cover the KSBs assigned to this assessment method.

The purpose of the questions will be to cover the following core themed topics, plus those related to the apprentices' chosen pathway:

Core topics for ALL apprentices:

- preparing for work
- legislative, procedural and operator requirements
- customer diversity and customer requirements
- identifying possible incidents and responding to incidents/emergencies
- working in differing conditions and supporting others
- performance standards

Ticketing Operative:

- promoting sales

Onboard or Station Operative:

- checking tickets

Dispatch Operative:

- vehicle turnaround and emergencies

Apprentices must be given at least two weeks' notice of the date and time of the interview underpinned by a portfolio. Apprentices must have access to their portfolio of evidence during the interview underpinned by a portfolio. Apprentices can refer to and illustrate their answers with evidence from their portfolio, however, the portfolio is not directly assessed.

The interview should take place in a quiet room, free from distractions and influence. Video conferencing can be used to conduct the interview. This can be organised during the arrangement of assessment with Highfield.

Before the assessment:

Employers/training providers should:

- ensure the interview underpinned by portfolio is arranged in conjunction with Highfield
- ensure the apprentice has collated a portfolio during their on-programme training prior to starting the apprenticeship
- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which passenger transport operative criteria will be assessed (outlined on the following pages)
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard and identify real-life examples
- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience as preparation for this assessment

Grading the interview underpinned by a portfolio mock assessment

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages (under 'Interview underpinned by a portfolio criteria').

- To achieve a **pass**, apprentices must achieve all of the pass criteria
- To achieve a **distinction**, apprentices must achieve all of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will not have achieved all of the pass criteria

Interview underpinned by a portfolio mock assessment

It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment, and Highfield recommends that the apprentice experiences a mock interview underpinned by a portfolio in advance of the end-point assessment with the training provider/employer giving feedback on any areas for improvement.

In designing a mock assessment, the employer/training provider should include the following elements in its planning:

- the mock interview should take place in a suitable and quiet location.
- a 60-minute time slot should be available for the interview if it is intended to be a complete mock interview covering all relevant standards (outlined in the following pages). However, this time may be split up to allow for progressive learning.

- consider a video or audio recording of the mock interview and allow it to be available to other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock interview with each apprentice.
- ensure that feedback is shared with the apprentice to complete the learning experience. Mock assessment sheets are available to download from the Highfield Assessment website and may be used for this purpose.
- use 10 structured, 'open' questions that do not lead the apprentice but allow them to give examples of how they have met each area in the standard. For example:
 - preparing for work
 - Explain how your approach to work ensures that you meet your organisation's safety and efficiency requirements.
 - legislative, procedural and operator requirements
 - Provide examples of at least two different risks associated with non-compliance and explain their potential impact.
 - customer diversity and customer requirements
 - Outline the different types of customers who may use transport services and describe their individual needs, rights and expectations when accessing these services.
 - Provide examples of how you have used specialised equipment or systems to assist vulnerable people and support their use of travel services.
 - identifying possible incidents and responding to incidents/emergencies
 - When preparing a passenger transport vehicle, or starting at a station, what preparation checks would you carry out?
 - working in differing conditions and supporting others
 - Provide an example of a time when you demonstrated resilience while handling a fast-changing situation involving unacceptable customer behaviour.
 - performance standards
 - Explain how you handle and resolve complaints according to your organisation's requirements.
 - ticketing operative – promoting sales
 - Can you outline the various techniques you have used to promote sales for a range of products and services?
 - onboard or station operative - checking tickets
 - Describe the process you follow to ensure a passenger has the correct ticket when they are onboard.
 - dispatch operative - vehicle turnaround and emergencies
 - Describe how you prepare a transport service for turnaround in line with organisational requirements.

Interview underpinned by portfolio criteria

Throughout the **60-minute** interview underpinned by a portfolio, the assessor will review the apprentice's competence in the criteria outlined below.

Apprentices should prepare for the interview underpinned by a portfolio by considering how the criteria can be met.

Preparing for work
To pass, the following must be evidenced.
PW1 Outlines the steps they take when preparing their own work area for use during a shift. Explains how their approach to work ensures they meet own organisation's safety and efficiency requirements. (S2, S7)
To gain a distinction, the following must be evidenced.
PW2 Explains how they have incorporated lessons learnt into preparing their own work area and how this enhanced safety or efficiency. (S2, S7)

Legislative, procedural and operator requirements
To pass, the following must be evidenced.
LP1 Outlines the relevant legislation/procedures and health and safety regulations that apply in the travel environment and the impact that they have on operations. (K1, K2, K4, S1, S11)
LP2 Describes how they observe safe and compliant working practices and educate passengers to keep travel environments safe, whilst adhering to regulation and organisational requirements. Provides at least two different risks associated with non-compliance. (K1, K2, K4, S1, S11)
To gain a distinction, the following must be evidenced.
LP3 Reflects on the importance of compliance with regulations and the impact this has had in the travel environments they work in. (S1, S11)

Customer diversity and customer requirements
To pass, the following must be evidenced.
DR1 Outlines the diverse types of customers who may use transport services. Describes their individual needs, rights and expectations whilst accessing transport services. (K13, K14, K15, K16, K17, K20, S4, S8)
DR2 Describes how they identify vulnerable people and respond to promote their safety, outlining the relevant safeguarding principles. (K13, K14, K15, K16, K17, K20, S4, S8)
DR3 Describes how they assist vulnerable people with specialised equipment or systems to support their use of travel services. (K13, K14, K15, K16, K17, K20, S4, S8)
To gain a distinction, the following must be evidenced.
DR4 Identifies the impact of failing to address the diverse needs of customers. (K20)

Identifying possible incidents and responding to incidents/emergencies

To pass, the following must be evidenced.

- IE1** Describes how they respond to a sudden event impacting the passenger transport network (either an incident, emergency or disruption). Outlines the procedural steps they followed when reporting the incident in line with requirements. (K3, K5, K6, K7, K11, S5, S6)
- IE2** Explains the checks and actions they are required to undertake to determine their response to issues, such as possible incidents, security breaches and emergencies. (K3, K5, K6, K7, K11, S5, S6)
- IE3** Outlines the approaches they take to manage suspicious/threatening activity. Describes ways to identify wider organisational response to live incidents. (K3, K5, K6, K7, K11, S5, S6)

To gain a distinction, the following must be evidenced.

- IE4** Reflects on the importance of adhering to requirements when reporting accidents/incidents. (K6, S5)

Working in different conditions and supporting others

To pass, the following must be evidenced.

- DC1** Outlines approaches to conflict management and states how they utilised these techniques to address inappropriate passenger/public behaviour. (K8, K9, K10, K12, K23, S3, B5)
- DC2** Describes the different internal and external stakeholders that must work together to provide safe and effective transport services. (K8, K9, K10, K12, K23, S3, B5)
- DC3** Describes expected customer conduct in a safety-critical environment. Describes different ways in which criminal activity can adversely impact transport services. Outlines the reporting procedures to follow when identifying such activity. (K8, K9, K10, K12, K23, S3, B5)
- DC4** Describes a time when they demonstrated resilience when handling a fast-changing situation involving unacceptable customer behaviour. Explains how their actions helped maintain the integrity of the transport service. (K8, K9, K10, K12, K23, S3, B5)

To gain a distinction, the following must be evidenced.

- DC5** Explains the balance between passengers' own responsibilities for behaving appropriately, and their own role in managing behaviours. (K8)

Performance standards
To pass, the following must be evidenced.
PS1 Outlines different ways in which a delayed travel service can impact customers and other stakeholders. (K18, K19, S9)
PS2 Describes how their performance is measured at work, and how their role contributes to organisational success. (K18, K19, S9)
PS3 Describes how they handle and resolve complaints in line with their own organisational requirements. (K18, K19, S9)
To gain a distinction, the following must be evidenced.
PS4 Suggests different ways to mitigate the impact of delayed travel services on customers. (K18, K19, S9)
PS5 Evaluates how the current complaints process could be improved to reduce complaints in own organisation. (K18, K19, S9)

Ticketing Operative

Promoting sales
To pass, the following must be evidenced.
PM1 Outlines the different techniques used when promoting sales for a range of products and services. Describes a time when they successfully used one or more techniques to sell a product or service and explains why it was appropriate. (K26, K30, S16)
To gain a distinction, the following must be evidenced
<i>No distinction criteria</i>

Onboard or Station Operative

Checking tickets
To pass, the following must be evidenced.
CT1 Outlines their own limits and responsibilities for checking tickets. (K34, K35, S20)
CT2 Outlines how they check a passenger has a correct ticket and describes a range of options for handling non-compliance in line with organisational requirements. (K34, K35, S20)
To gain a distinction, the following must be evidenced
<i>No distinction criteria</i>

Dispatch Operative

Vehicle turnaround and emergencies
To pass, the following must be evidenced.
VT1 Explains how they have stopped a vehicle in an emergency situation to reduce risk to those impacted by the emergency, outlines the procedures and rationale involved in reaching this decision. (K38, S23)
VT2 Describes how they prepare (ready) a transport service for turnaround in line with organisational requirements. (K39, S21)
<i>To gain a distinction, the following must be evidenced</i>
<i>No distinction criteria</i>

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