

Itinerary review

Another Check-In · R04

Before the demonstration

Bertland Hope

- Your assigned responsibility
- The correct training record
- Evidence of the result

Today's outcome

Reviewer records a reasoned plan/change decision and identifies follow-up from oversight.

The submitted plan

Bertrand Hope

- Open Admin > Itinerary Review and inspect dates/stops/purpose for the assigned training plan

In this step

Read the period, stops and purpose for the assigned staff member. Check whether the sequence and expected locations describe the proposed work. Your review scope follows your organizational responsibility.

A review decision

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- Approve, return for changes or reject with explanatory notes according to local authority

In this step

Approval, return and rejection have different consequences. Explain the decision in the notes. Return is useful when the employee needs to correct the plan, while approval confirms the submitted plan under local authority.

Deviation review

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- Open Itinerary Deviations and review a request
- use urgent assignment only for an authorized operational need

In this step

Compare the requested change with the approved entry and the operational reason. An urgent assignment still requires the right authority. Keep the decision traceable so later oversight can distinguish an approved change from unexplained travel.

Oversight exceptions

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- Open Itinerary Oversight and examine missing plans, missed stops, wrong-location and incomplete attendance

In this step

Missing plans, missed stops and incomplete attendance point to different follow-up. Start with the evidence for the specific person and day. A report refresh does not automatically run the maintenance process that materializes missed stops.

Plan and actual report

Bertrand Hope

- Open Itinerary Report and compare planned versus actual
- export if needed, showing GPS only where granted

In this step

Compare expected work with actual attendance and the reviewed deviations. GPS visibility has a separate permission. A reviewer without GPS or correction rights should escalate those tasks to the designated custodian.

Common problems

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- Treating missing-stop detection as proof of misconduct
- assuming reviewer filters are authorization
- approving a private location promotion without its separate permission

A useful support report

The task and record

The expected result

The actual message

The authorized next step

Guided practice

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- Return one submitted plan for correction, approve another submitted plan, decide a prepared deviation and explain one report discrepancy using evidence

Evidence to show

The correct training case

The result or permitted decision

Your explanation of the next step

Practice debrief

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- Correct context and permitted action
- A result you can trace
- A clear next step if blocked

Expected result

Reviewer records a reasoned plan/change decision and identifies follow-up from oversight.