

# SOP Template: Pre-travel Briefing and Checklist

This SOP details the process for conducting a comprehensive **pre-travel briefing and checklist**. It includes verifying travel documents, reviewing itinerary and safety protocols, ensuring communication equipment is operational, confirming health and emergency plans, and packing necessary supplies. The objective is to prepare all travelers thoroughly to promote safety, efficiency, and compliance before departure.

## 1. Purpose

To ensure all travelers are fully briefed, equipped, and compliant with organizational and safety requirements prior to departure.

## 2. Scope

This SOP applies to all personnel and stakeholders involved in organizational travel.

## 3. Responsibilities

- **Travel Coordinator:** Organizes briefing, verifies documents, and ensures checklist completion.
- **Travelers:** Attend briefing, provide required information, and complete assigned tasks.
- **Supervisor/Manager:** Approves travel plans, reviews pre-travel status, and ensures compliance.

## 4. Procedure

1. **Schedule Pre-travel Briefing:**
  - Set briefing date/time at least 48 hours before departure.
  - Notify all travelers and relevant staff.
2. **Verify Travel Documents:**
  - Passport and visa (validity and requirements)
  - Flight tickets and hotel confirmations
  - Emergency contacts and insurance details
3. **Review Itinerary and Safety Protocols:**
  - Go through the full itinerary and travel plan
  - Discuss local laws, customs, and safety considerations
4. **Check Communication Equipment:**
  - Test mobile phones, radios, chargers, and backup batteries
  - Provide emergency contact list
5. **Confirm Health and Emergency Plans:**
  - Verify medical information, vaccinations, and medications
  - Review emergency evacuation and reporting procedures
6. **Packing and Supplies:**
  - Distribute packing checklist (see below)
  - Ensure all required items are packed and accounted for
7. **Final Confirmation:**
  - All staff sign/acknowledge checklist completion
  - Submit completed checklist to supervisor

## 5. Pre-travel Checklist

Item	Completed (âœ”/âœ–)	Comments
Passport & Visa Valid		
Flight Ticket & Hotel Bookings		
Insurance Documents		
Emergency Contacts Updated		
Itinerary Reviewed		
Communication Devices Tested		

Health/Vaccination Certificates		
Medications Packed		
Essential Supplies Packed		
Briefing Attendance Confirmed		

## 6. Records

- Completed travel checklists (retain for audit)
- Briefing attendance list
- Travel documentation copies

## 7. Review and Updates

This SOP should be reviewed annually and updated as necessary to ensure ongoing compliance and traveler safety.