SOP: Travel Request Submission and Approval Process

This SOP details the **travel request submission and approval process**, including the steps for submitting travel requests, required documentation, approval workflows, criteria for travel authorization, communication protocols, and record-keeping. The objective is to ensure efficient and transparent handling of travel requests, compliance with organizational policies, and proper authorization before any travel arrangements are made.

1. Scope

This procedure applies to all employees requesting business-related travel and to those responsible for reviewing and authorizing such requests.

2. Purpose

To establish a standardized process for submitting, reviewing, approving, and documenting travel requests in compliance with organizational policies.

3. Definitions

Term	Definition
Travel Request	Documentation outlining the purpose, details, and estimated costs of a proposed business trip.
Approver	The authorized individual(s) responsible for reviewing and approving travel requests.
Traveler	The employee requesting authorization to travel for business purposes.
Supporting Documentation	Documents such as agendas, invitations, cost estimates, and travel itineraries.

4. Roles and Responsibilities

- **Traveler:** Submits travel request and required documentation.
- **Manager/Supervisor:** Reviews and endorses the request.
- **Approver (e.g., Department Head, Finance):** Provides final authorization.
- **Travel Coordinator/HR:** Ensures compliance and maintains records.

5. Procedure

1. **Request Submission**
   - Complete the Travel Request Form (digital or paper, as applicable).
   - Attach required supporting documentation (see section 6).
   - Submit the complete package to the immediate supervisor/manager.
2. **Manager/Supervisor Review**
   - Verify business need, cost justification, and compliance with policy.
   - Endorse with comments and forward to the designated approver.
3. **Approval Workflow**
   - Approver reviews for budgetary availability, necessity, and policy compliance.
   - Approver communicates approval, denial, or request for modification within 3 business days.
   - If approved, traveler is notified and may proceed with booking arrangements.

4. **Communication**
   - All decisions (approval/denial/modification) are communicated via email and archived.
5. **Record-Keeping**
   - Maintain electronic or physical copies of approved requests and supporting documentation for a minimum of 3 years.
   - Travel Coordinator/HR ensures records are accessible for audit and reference.

6. Required Documentation

- Completed Travel Request Form
- Event/meeting agenda or invitation
- Estimated costs (transportation, lodging, meals, registration, etc.)
- Itinerary (if available)
- Other justification/supporting documents as needed

7. Approval Criteria

- Clear business necessity and benefit
- Availability of budget funds
- Compliance with company travel policy
- Submission of all required documentation
- Alignment with organizational priorities and objectives

8. Communication Protocols

- All requests and approvals are processed via the official organizational email or travel management system.
- Travelers must not make any bookings prior to receiving written approval.
- In case of urgent or exceptional circumstances, immediate notification to the approving authority is required.

9. Record-Keeping Requirements

- Maintain records of all travel requests, approvals, and related documentation securely.
- Records must be readily retrievable for auditing and reporting purposes.

10. Revision and Review

This SOP will be reviewed annually and updated as necessary to reflect changes in organizational policy or regulatory requirements.

Effective date: [Insert date]

Prepared by: [Insert name/title]

Approved by: [Insert name/title]