

SOP: Request and Approval Process for Travel

This SOP details the **request and approval process for travel**, encompassing travel request submission, required documentation, approval hierarchy, budget considerations, travel arrangements, and post-travel reporting. The objective is to ensure all travel is pre-approved, cost-effective, and aligned with organizational policies, facilitating efficient and responsible travel management.

1. Scope

This SOP applies to all employees or representatives requesting travel on behalf of the organization for official purposes.

2. Definitions

Term	Definition
Travel Request	Formal application to seek approval for official travel.
Approver	Authorized personnel with the authority to grant or deny travel requests.
Traveler	Individual requesting and undertaking the travel.

3. Procedure

1. Travel Request Submission

- Complete the Travel Request Form (electronic or paper as applicable).
- Attach required documentation: itinerary, event/conference details, cost estimates, and justification.
- Submit the request to the Line Manager at least **four weeks prior** to the planned travel date.

2. Documentation Required

- Completed Travel Request Form
- Travel itinerary and proposed dates
- Cost estimates (flights, accommodation, meals, transportation, incidentals)
- Business justification for the travel
- Supporting event or meeting invitation/details

3. Approval Hierarchy

- Line Manager reviews and recommends (approve/disapprove).
- Requests exceeding departmental budget or international travel are escalated to the Department Head or Management.
- Finance reviews budget availability and compliance with policy.
- Final approval communicated to requester in writing.

4. Budget Considerations

- Verify availability of funds within cost center or project budgets.
- Ensure costs adhere to organization's travel policy limits and per diem rates.
- Non-compliance requires additional justification or higher-level approval.

5. Travel Arrangements

- Upon approval, bookings are made according to organization's travel booking process (in-house team or authorized agency).
- All bookings should utilize preferred vendors/contracts where available.
- Travel advances or per diems should be processed by Finance, if applicable.
- Traveler is responsible for retaining and submitting all relevant receipts.

6. Post-Travel Reporting

- Within five business days of return, submit a Travel Expense Report with receipts to Finance.
- Include a brief summary of travel outcomes/achievements aligned with objectives.
- Unutilized advances must be returned per organization policy.

4. Responsibilities

Role	Responsibility
Traveler	Initiate request, submit documentation, comply with policies, submit expense report post-travel.
Line Manager	Review, recommend approval/disapproval, ensure alignment with objectives.

Department Head/Approver	Final approval as per hierarchy and policy.
Finance	Verify budget, process payments, review post-travel expenses.

5. References

- Travel Policy Manual
- Travel Request Form Template
- Expense Reimbursement Policy

Note: Non-compliance with this SOP may result in delay or disapproval of travel requests and non-reimbursement of expenses.