

Standard Operating Procedure (SOP): Travel Authorization Request and Approval Process

This SOP details the **travel authorization request and approval process**, including submission of travel requests, required documentation, review and approval workflow, travel budget considerations, compliance with organizational policies, and final authorization. The objective is to ensure proper oversight, cost control, and adherence to corporate travel standards before any business travel is undertaken.

1. Purpose

To define the standardized process for requesting, reviewing, and approving organizational travel, ensuring compliance with travel policies and budgetary controls.

2. Scope

This SOP applies to all employees, contractors, and consultants who intend to undertake business travel funded by the organization.

3. Responsibilities

Role	Responsibilities
Traveler	Initiate travel request, provide required documentation, and ensure accuracy of information.
Supervisor/Manager	Review travel request for necessity, budget, and policy compliance; recommend approval or rejection.
Finance/Accounting	Verify budget availability and fiscal compliance.
Travel Coordinator/Administrator	Facilitate processing, maintain records, and support logistics.
Authorized Approver(s)	Grant or deny final travel authorization.

4. Procedure

- 1. Travel Request Submission**
 - Employee completes the official Travel Authorization Request Form, attaching all required supporting documentation (e.g., agenda, invitation, cost estimates).
 - Submission method: Electronically via the travel management system or, if unavailable, via email/hard copy to supervisor.
- 2. Required Documentation**
 - Travel Authorization Request Form
 - Purpose and justification of travel
 - Detailed itinerary (dates, locations, proposed accommodation)
 - Cost estimates (transport, lodging, meals, incidentals)
 - Supporting documents (e.g., meeting invitations, agendas)
- 3. Supervisor/Manager Review**
 - Validate necessity of travel and alignment with business objectives.
 - Check compliance with travel and budget policies.
 - Recommend approval or rejection and forward request accordingly.
- 4. Finance/Budget Review**
 - Verify budget availability and cost accuracy.
 - Confirm compliance with financial policies.
 - Add comments if necessary; forward to next approver.
- 5. Final Authorization**
 - Authorized approver(s) review all documentation and recommendations.
 - Approve or deny travel request.
 - Notify requester of decision and, if approved, coordinate travel arrangements.
- 6. Record Keeping**

- Travel Coordinator/Administrator ensures secure storage of all travel authorization forms and documentation for audit purposes.

5. Travel Budget Considerations

- All travel requests must be assessed against the available departmental/project budget.
- Cost-saving opportunities (e.g., advance booking, standard class fares) should be prioritized.
- Non-compliant or over-budget travel requests require justification and additional approval.

6. Compliance

- All travel must comply with the organization's travel and expense policy.
- Exceptions require written justification and executive approval.
- Non-compliance may result in denial of reimbursement or disciplinary action.

7. Forms and Documentation

- Travel Authorization Request Form (template available from Travel Coordinator or Intranet)
- Travel Expense Report form

8. Revision History

Version	Date	Description of Change	Author
1.0	2024-06-01	Initial SOP creation	Corporate Admin