CALGARY SAFETY CONSULTANTS

Journey Management Plan and Trip Log

Plan the trip

Use this plan for any work trip your program rates as medium or high risk, and for any trip where a worker drives alone to a remote location. Complete it before departure, have it approved at the right level, give a copy to the journey contact and keep the trip log up to date until the trip is closed out.

How to use this form

- **Driver or trip lead:** complete Sections 1 to 9 before the trip. Be specific about the route, hazards and dead zones. "Usual route" is not a plan.
- **Approver:** check the risk level, the check-in schedule and the overdue procedure, then sign Section 11. Send higher-risk trips up the line.
- **Journey contact:** keep a copy, record every check-in in the trip log (Section 12) and start the overdue procedure (Section 10) as soon as a check-in is missed.
- **On arrival:** the driver checks in, the journey contact confirms, and the driver completes the close-out (Section 13). Pass route hazards to the program administrator for the hazard register.
- Check in only from a safe stop. Never call or message a moving driver and expect an answer.

Section 1: Trip details

Plan number

Date of travel

Prepared by

Department or crew

Driver name

Driver mobile

Licence class

Passenger names

Passenger mobile numbers

Vehicle make, model and colour

Unit number

Plate

Trailer or load

Departure point

Destination (site name, LSD or address)

Site phone

Purpose of trip

Planned departure

Planned arrival

Planned return

Trip features (tick all that apply)

- ☐ Driving alone
- ☐ Return trip the same day
- ☐ Overnight stay planned
- ☐ Night driving likely

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Section 2: Is this trip necessary?

The most effective control is to avoid the trip. Tick each option you considered before planning the drive.

- ☐ We considered a video call, phone call or photos instead.
- ☐ We considered postponing until conditions improve.
- ☐ We considered changing the timing (avoid dusk, night or a post-shift drive).
- ☐ We considered combining this trip with others.
- ☐ We considered another mode (crew bus, flight, camp stay).
- ☐ The trip is necessary and cannot reasonably be avoided.

Section 3: Risk level screen

Tick every condition that applies. Use your own company criteria where they differ. Any tick in the high column, or several medium ticks, should raise the risk level and the approval authority.

Condition	Applies	Usual level	Notes
Driving alone to a remote or isolated location	☐		
No cell coverage on part of the route	☐		
Resource, lease, ice or radio-controlled roads	☐		
Winter conditions, poor forecast, smoke or spring breakup	☐		
Night driving or very early start	☐		
Drive after a long shift (fatigue risk)	☐		
Long drive (beyond your company limit)	☐		
Towing, heavy load, dangerous goods or passengers	☐		
New driver or driver new to this route	☐		
Other hazard (describe in notes)	☐		

Risk level for this trip

☐ Low risk ☐ Medium risk ☐ High risk

Approval: a supervisor may approve low-risk trips; medium and high-risk trips usually need higher authority. Follow your company's approval matrix.

Guidance notes: setting the risk level

- Energy Safety Canada's guideline expects each organization to define its own risk criteria and tolerance. It uses snow as an example, asking when a condition like that should move a journey from low to medium risk.
- Working alone rules often apply to a worker driving alone to a remote site. Check-ins, a way to communicate and a plan for when the worker can't be reached are expected in most jurisdictions.
- If the risk is high, look again at Section 2. Postponing, adding a second person or changing the timing may bring the risk down more than any control on the road.
- When conditions change during the trip (a storm, a road closure, fatigue), the risk level changes too. The driver tells the journey contact and the plan is updated.

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Section 4: Route

Main route (highways, roads, turn-offs, site access)

Alternate route | **Distance (km)** | **Driving time**

Planned rest stops | **Fuel points**

Route hazards

Location or km	Hazard (wildlife, grade, crossing, road works, traffic)	Coverage	Control or plan

Section 5: Weather and road conditions

Check official sources such as 511 Alberta, DriveBC or your province's road report, and Environment and Climate Change Canada forecasts and warnings.

- ☐ Road report checked for the whole route
- ☐ Wildfire, smoke or flood advisories checked
- ☐ Conditions acceptable for this trip
- ☐ Weather forecast and warnings checked
- ☐ Site or lease road access confirmed with the site
- ☐ Trip postponed or rerouted (explain below)

Sources checked | **Time checked** | **Conditions summary**

Guidance notes: writing a useful route

- Write the route so a stranger could follow it: highway numbers, towns, turn-offs, kilometre markers, lease or site names and gate locations.
- Mark where coverage ends and starts again. The last known position before a dead zone is where a search begins.
- Add hazards from your route hazard register and from drivers who know the road: wildlife corridors, river crossings, steep grades, logging or oilfield traffic.
- Record the time you checked the road report and forecast. Conditions on a winter morning can change within hours.

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Section 6: Communication

Devices carried (tick all)

- ☐ Mobile phone
- ☐ Two-way radio
- ☐ Satellite communicator
- ☐ Satellite phone
- ☐ In-vehicle monitoring (IVMS)
- ☐ Journey management app

Radio channel or call procedure

Satellite device ID or number

Device tested (time)

Known dead zones (location and expected time out of coverage)

Section 7: Check-in schedule

Journey contact

Contact phone

Hours available

Backup contact

Backup phone

Check-in interval

No.	Planned time	Planned location (waypoint, junction, gate)	Method	Notes
1				
2				
3				
4				
5				
6				
7				

Always include departure and arrival check-ins, and a check-in just before each dead zone. Shorten the interval for remote, solo or winter trips.

Guidance notes: check-ins that work

- There is no single legal interval for drivers. Energy Safety Canada's guideline uses every two hours as an example; set yours by risk.
- BC and Prince Edward Island require an end-of-shift check for workers who work alone. Make the arrival check-in the end of the trip, and include the drive home.
- Check in only from a safe stop. Distracted driving laws restrict hand-held devices, and hands-free calls are still a distraction.
- Test satellite devices and IVMS before leaving, and make sure alerts go to someone who is watching for the whole trip.

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Section 8: Pre-trip vehicle and kit check

- [ ] Pre-trip vehicle inspection completed
- [ ] Fuel full or enough to reach fuel points
- [ ] First aid kit stocked
- [ ] Shovel, tow strap and booster cables
- [ ] Fire extinguisher (if required)
- [ ] Load secured and within limits
- [ ] Tires suitable for the season (winter tires when needed)
- [ ] Lights, wipers and washer fluid working
- [ ] Winter or survival kit (warm clothing, blankets, food, water)
- [ ] Spare tire and jack
- [ ] Phone charger and power for devices
- [ ] Dangerous goods documents (if carried)

Section 9: Driver fitness declaration

- [ ] I am rested and fit to drive, and not impaired by alcohol, cannabis, drugs, medication or fatigue.
- [ ] I hold a valid licence for this vehicle and am trained for the roads and conditions on this trip.
- [ ] I know the route, hazards, check-in times and what to do if I break down or am stranded (stay with the vehicle).
- [ ] I will not use a hand-held device while driving and will check in only from a safe stop.
- [ ] I understand I can stop, delay or refuse this trip if conditions become unsafe, and I will tell the journey contact.

Driver signature (type name)

Date

Hours worked before departure

Guidance notes: fitness, fatigue and vehicles

- Being within hours-of-service limits does not automatically mean a driver is fit for duty. Ask about sleep, hours already worked and the drive home.
- Federal hours-of-service rules apply to extra-provincial carriers' trucks or truck and trailer combinations over 4,500 kg registered gross vehicle weight, and larger buses. A heavy-duty pickup or a pickup towing a trailer can be over that threshold. Carriers working within one province follow that province's rules.
- Give drivers the authority to stop, rest, stay overnight or turn back, and back that decision every time.
- Report vehicle defects before the trip. A vehicle that fails the pre-trip inspection does not go.

Concerns raised by the driver and how they were resolved

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Section 10: Overdue procedure

A late check-in is not automatically an emergency, but the steps below start as soon as one is missed. Set the times by risk level. These times are company decisions, not legal limits.

Step	Time after missed check-in	Done	Time done
1. Note the missed check-in. Call and message the driver and passengers; try satellite or monitoring devices; check last known GPS position.		☐	
2. Call the destination, the departure point and the next planned stop. Notify the supervisor.		☐	
3. Supervisor sends someone along the planned route from the last known location and notifies management.		☐	
4. Call 911 or police with route, vehicle, plate, driver details and last known position. Start the emergency response plan.		☐	
5. When the driver is found: record times and cause, close out the plan and report for review.		☐	

Grace period (minutes)

Supervisor phone

Manager phone

Local police or RCMP

Information for emergency services: route and alternate route, last check-in time and place, last known GPS position, vehicle make, colour and plate, driver and passenger names, devices carried and conditions on the route. In extreme cold, shorten every step.

Section 11: Approval and sign-off

- ☐ Necessity check completed
- ☐ Route and hazards are specific
- ☐ Journey contact and backup confirmed
- ☐ Risk level and approval authority match
- ☐ Check-in schedule covers departure, dead zones and arrival
- ☐ Overdue procedure times set

Conditions of approval (for example, no travel after dark, two-person crew)

Approved by (name and position)

Signature (type name)

Date and time

Copy given to journey contact (name)

Time

Plan filed at

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Section 12: Trip log (journey contact)

Record every check-in as it happens, including late or missed ones and any changes to the plan.

Planned	Actual	Location	Status	Notes or changes	Initials

Trip log summary

- ☐ All check-ins on time
- ☐ Late check-in followed up
- ☐ Overdue procedure started

Section 13: Close-out

Actual arrival time

Arrival confirmed by

Return trip plan number (if separate)

- ☐ Everyone arrived safely
- ☐ Vehicle defects reported
- ☐ New route hazards noted below
- ☐ Journey contact confirmed close-out
- ☐ No incidents or near misses
- ☐ Plan and log filed

New or changed route hazards for the hazard register (location, hazard, coverage, suggested control)

Incidents, near misses or late check-ins, and what happened

Lessons learned and suggested improvements

Closed out by (driver)

Reviewed by (supervisor)

Date

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Worked example (illustrative entries)

Section	Example entry
Route	Hwy 43 west to Fox Creek, north on the lease road 18 km to the wellsite. Alternate: [your detour] if Hwy 43 is closed.
Hazard	Km 6 to km 18 on the lease road: no cell coverage, logging traffic, radio-controlled road. Call kilometres on the posted channel.
Check-ins	Depart shop 06:00; Fox Creek junction about 07:45; lease road gate before km 6 at about 08:05 (expect no coverage for 30 minutes); arrival on site by 08:40.
Overdue	Grace period 15 minutes, then site call and supervisor. Supervisor sends a truck from the site toward km 6 at 30 minutes. Police at 60 minutes, or sooner in extreme cold.
Risk	Solo winter trip to a remote site with a dead zone: high risk, approved by the operations manager, satellite communicator required.

Key terms

Term	Meaning on this form
Journey management	A planned and systematic way to evaluate, reduce and control transportation-related hazards (Energy Safety Canada's definition).
Journey contact	The person, not travelling, who receives check-ins, watches the clock and starts the overdue procedure. Name a backup.
Check-in	A scheduled contact from the driver at a set time or place, made from a safe stop, by phone, radio, satellite device or monitoring system.
Grace period	The short window after a missed check-in when the journey contact tries to reach the driver before escalating.
Dead zone	A stretch of road with no cell or radio coverage. Schedule a check-in just before it, with the expected time back in coverage.
Close-out	Confirmation that everyone arrived safely and the plan is finished. A trip is not over until it is closed out.

Common mistakes to avoid

- No one watching the clock, or check-ins sent to a phone nobody monitors.
- No arrival check-in, so a trip is never closed out.
- Vague routes that give a search team nothing to work with.
- Calling drivers while they are moving, which invites hand-held use and distraction.
- Ignoring fatigue after a long shift, even when hours-of-service limits are met.

Free guide. Read How to Set Up Journey Management for Field Crews at calgarysafetyconsultants.ca/safety-guides/hazard-management/journey-management/. Questions? Call Calgary Safety Consultants at 1-888-231-0358.

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