Quick Reference Guide

Departmental Study Abroad Program – see overall program deadlines on the last page

Chapters referred below are part of the Nuts & Bolts Manual found at:
https://www.studyabroad.purdue.edu/resource/DepartmentalSAProgramManual.pdf

What to Do	Who	How to Do It
Develop a program proposal	Program Leader – (Business Manager will assist with the preliminary budget)	All five parts must be included before submitting for approval: 1. course description 2. completed Intercultural Learning Worksheet 3. preliminary itinerary 4. preliminary budget 5. approval form Additional information regarding the proposal can be found in Chapter 2 of the Study Abroad Manual **Program Period** / **Proposal Due Date** Sept-Dec (Fall) — Feb 1st prior to program Jan – April (Spring) — July 15th prior to program May-Aug (Summer) — Nov 1st prior to program ***NOTE: Winter Break programs follow Spring semester dates.***
Gain approvals for proposed program	Program Leader and Business Manager	Signatures are required on the Approval Form from the following individuals: 1. Head of the academic department sponsoring the program (It is recommended that the Head reviews the proposed program with the departmental Business Manager) 2. Dean of the college 3. Director of Study Abroad 4. Dean of International Programs NOTE: Separate program approval forms must be completed for each department involved.
Distribution of Approved Proposal Approval form	Study Abroad	Original – Will remain in study abroad. Coordinator will liaise with study abroad schedule deputy to create SA number. copies – program leader, business manager
Establish study abroad course number(s)	Study Abroad Schedule Deputy	Establish an SA course number that begins with SA followed by five numbers and corresponds with a departmental course number. The departmental course number is included on the approved proposal for the program. See Chapter 2 *Courses & Credits* NOTE: Two SA numbers need to be established if – 1. program is offered to both undergraduates and graduate students 2. program offers different options within the program that will change the cost
Communicate study abroad course number(s)	Study Abroad	Study Abroad emails the Program Leader and Business Manager. NOTE: Study abroad course numbers need to be documented on the rate request.
Create Web page – once program has been approved	Study Abroad	Create a Web page for the program and list the title, dates, study abroad course number and leader's name with email address and telephone number.
Maintain Web page & begin recruiting process	Program Leader	Update the Web page with changes as needed. *See Chapter 7.* Determine if application is required. *See Chapter 10 for additional info*.
Enroll on website	Students	Students can begin the application process by enrolling on the Study Abroad website - see *Chapter 10.*

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Establish an account for the program	Business Manager	Establish a 2204xxxx fund in the cost center of the sponsoring academic department. If a new Fund needs to be established, use the OnePurdue Master Data Form – Fund Request at: https://sp2013.itap.purdue.edu/businessservices/acctservices/SitePages/onepurdue%20master%20acct%20forms.aspx When setting up a new Study Abroad fund, please check Nuts and Bolts Manual, Chapter 4 for further instructions. • **Charge Payroll Fringe Benefits?** ○ Fee Remits = Yes ○ Perf/SS = Yes ○ Fringe Ben = Yes You will receive an email once the new fund is established.
Validate Fund set up – once the new fund has been established	Business Manager	Run t-code **FM5S** Enter new fund number Review the following fields: • Name • Description • Fund Long Description • User Field 2 (this should be your main cost center) • Fee Remissions = Y • PERF/SS = Y • Fringes = Y
Prepare Rate Request – once program has been approved	Program Leader and Business Manager	Prepare Rate Request form - *See Chapter 5 & 6* Things to consider when preparing the rate request: 1. Will a deposit be required – *see Chapter 11* 2. Will a cancellation policy be applied – *see Chapter 6* 3. Will the department be subsidizing the rate? 4. How will an overdraft be covered? **Program Period** — **Rate Request Due Date** September – December* (*Fall*) — June 1st prior to program January – April *(Spring)* — October 1st prior to program May – August (*Summer*) — February 1st prior to program ***NOTE: Winter Break programs follow Spring semester dates.***
Gain Rate Request Approvals	Program Leader and Business Manager	Signatures are required for the Rate Request from the following individuals: 1. Head of the academic department sponsoring the program 2. Dean of the college 3. Director of Study Abroad 4. Director of Business Services *Submit electronic copy to Study Abroad.
Distribution of approved rate request	Director of Business Managers	Copies will be mailed to: 1. Business Manager 2. Study Abroad Office 3. Bursar's Office 4. Financial Aid
Check visa requirements	Program Leader	Check country specific information on the travel.state.gov website: http://travel.state.gov/ Also check with the program specific consulate office. *See Chapter 8 for more information*

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Update Program Leader page (study abroad database) with enrollment information	Program Leader	NOTE: It is crucial for the leader to keep the on-line list of students completely accurate. Students will not be considered participants until their record is listed as "**accepted**." *Special request for participation must be made for students on academic/disciplinary probation.
Distribute the cancellation policy to the enrolled students	Program Leader	Cancellation Policy is distributed to students. The cancellation policy should outline the financial penalties if participants withdraw at various points along the timeline, including after the program has started. *See Chapter 6 for additional information. You may also view the sample Participation and Cancellation Form.* NOTE: The cancellation policy must be a part of the rate request.
Collect non-refundable deposits (if applicable)	Program Leader	Deposits are collected online using TouchNet. Students may log into their MyPurdue and pay the required deposit ($500 increments): Instructions for Online Deposit. Receipt of payment should be submitted to department with signed Cancellation Policy.
Apply deposit to student's account	Bursars Office	Apply the student's deposit to their account. If a student cancels enrollment in the program, the deposit is NOT returned to the student; it is maintained in the program account. - *see Chapter 13*. If the University chooses to cancel the program; the deposit is returned to the student.
Transfer deposit to department account	Bursar Office	A specific detail code is used and this feeds SAP to transfer the income to the departmental account.
Determine program viability	Program Leader/Business Manager	Once the deadline for students to apply has passed; decide whether the program has enrolled a sufficient number of students. *See Chapter 14 for additional information.* Things to considered: 1. What is the enrollment number compared to the budget? 2. If enrollment is less than budgeted; is the enrollment high enough for the program to proceed? 3. What is the deadline to pay the travel vendor(s) for the program? ** Notify Study Abroad if program must be canceled.
Identify students that are receiving department scholarships (if applicable)	Program Leader and/or academic counselor	Notify the Business Manager of students receiving scholarships from department for this study abroad program.
Notify Division of Financial Aid of **department** scholarships (NOT SA scholarships)	Business Manager	As soon as you are aware that a student is receiving a scholarship for this study abroad program, prepare and process the Request for Scholarship Payments to Students form 79S or Request for Scholarship, Award or Prize – International Student form 79INT. Gain signatures and forward to Division of Financial Aid (DFA) in Schleman Hall (SCHL). Forms are located at: http://www.purdue.edu/ais/forms.html
Apply scholarship to student's account	Division of Financial Aid	Credit student's account with scholarship information.
Overrides for registration	Study Abroad	Study Abroad will enter overrides for every "accepted" student listed on the Program Leader page.

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Registration for the Program	Student	Students log into their "My Purdue" account and register for the SA course number -*see Chapter 10*. Students will incur a $200 late fee if not registered by the end of add period.
Students billed for program fees	Bursar Office	Students are billed via their Purdue Bursar account based on the approved program rate request.
Transfer program fees received to department account	Bursar Office	Once student(s) have paid their fees a specific detail code is used and this feeds SAP to transfer the income to the departmental program study abroad account.
Review Program leader page (study abroad database)	Program Leader	Review the program leader page to verify that registered students are reflected correctly "accepted". Log in to http://www.studyabroad.purdue.edu/, click on "My Study Abroad" button; use your career account to log in and password to access. If students have withdrawn from the program, make sure they are marked accordingly. *See Chapter 13 for additional information*.
Submit Cost Sheets to Financial Aid	Study Abroad	The Study Abroad office submits the Cost Sheet that was submitted with the rate request from the sponsoring academic department to the Division of Financial Aid and the Bursar. The cost sheets will contain information from the rate request. These cost sheets are used to calculate student financial aid.
Determine if credit card is needed for this program	Business Manager and Program Leader	Business Office works with the Program Leader to see if a Purchasing Card is needed. Contact the E-Commerce and Credit Card Operations department for assistance (ecco@purdue.edu). For additional information and forms go to the E-Commerce and Credit Card Operations Web site located at: http://www.purdue.edu/business/procurement/acctpay/Purchasing_Card/index.html
Complete Purdue travel forms	Program Leader(s)	Program leader(s) works with their Business Office to complete the required pre-trip travel requests through the Concur Travel System: https://www.purdue.edu/apps/account/cas/login?service=https%3A%2F%2Fwww.purdue.edu%2Fapps%2Faccount%2FSAMLPost%2Fconcur
Attend orientation	Program Leader	Program leaders will be invited to attend faculty orientation scheduled early in spring semester. Attendance at this meeting is mandatory.
Conduct student pre-departure meeting	Program Leader/Study Abroad	Leaders schedule a pre-departure meeting for program participants. Study Abroad Office staff members are available to attend. *See Chapter 15* for topics to be covered.
Collect student forms	Program Leader	Leaders need to verify that all student forms have been submitted and check to determine if there are any specific student needs (i.e. medical form, special needs). The following forms are required from the student and submitted via their My Study Abroad page. Program leaders may view these forms via their Program leader page: 1) Statement of Responsibility 2) Medical Form / Special Needs 3) Passport copy 4) Travel waiver (required for students traveling to a country with current travel warning).

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Submit program forms	Program Leader	Program Leaders need to submit the following forms to the study abroad office no later than 2 weeks prior to program: 1) Final Program Itinerary 2) Emergency Procedure Form 3) U.S. State Department Registration: https://step.state.gov/step/ *See Chapter 15 for more information.*
Order emergency medical coverage	Business Manager	Prior to the start of the program, complete the Request for Study Abroad Coverage RM23 Form and submit to Risk Management/Freh. A list of student names, PUID, DOB and email address can be downloaded from the Program Leader Page. *See Chapter 15 for additional information.*
Submit insurance pamphlets and insurance cards	Risk Management	Send the insurance pamphlets that detail the coverage and an insurance card for each student to the individual identified on the RM23 Form.
Distribute insurance cards to each student	Program Leader	Distribute the insurance cards to each student prior to departure.
Review safety and security	Program Leader	Safety and Security procedures will be discussed during faculty orientation - *See Chapter 16.*
Process program expenses	Program Leader and Business Manager	Process expenses related to the approved study abroad program. Use the approved rate request to help monitor the expenses. *See Chapter 17 for additional information.* If a wire transfer is needed, follow the Business@Purdue process located under Finance/ Payments & Reimbursements Process / "Pay Non P.O Related Invoice via Wire Transfer" https://spa2010.itap.purdue.edu/Business/businessatpurdue/_layouts/WordViewer.aspx?id=/Business/businessatpurdue/Process%20Library/Pay_Invoice_Via_Wire_Transfer.doc&Source=https%3A%2F%2Fspa2010%2Eitap%2Epurdue%2Eedu%2FBusiness%2Fbusinessatpurdue%2FPages%2F
Distribute course roster	Program Leader (or designated person within your area that has access to course rosters)	Prior to the start of the program, (see dates established in the rate request for deposit due dates, cancelation dates etc.) Provide the Business Manager with a course roster from **BANNER**. This will be used to review the program fee income received into the account. *Program Leader will need to follow up with any student not in registered status.
Review income received into the program account	Business Manager	Monthly - run t-code **FMPR_RFFMEP1AX** (All Postings) to review all of the income that has been deposited into the account for this program. (When running this t-code, use commitment item = 400000 to 499999.) This will allow you to monitor the income with the expenses associated with offering this program; work with the program leader to discuss projected income and expenses.
Compare income received with course roster	Business Manager	Once the roster has been finalized, compare course roster, income received and program fee to verify that all income has been received. If course roster X program fee doesn't equal income, then review the study abroad data in SharePoint. This data is pulled from Banner and list each student and the amount paid; compare this to your course roster. Accessing SharePoint: https://sp.itap.purdue.edu/ssta/businessservices/default.aspx To log in, enter: "onepurdue\ your career user name" and your career password.

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Submit student's grades	Program Leader	Once the program has concluded, faculty will log into their program leader page, click on the "Enter Final Grades" tab and input the appropriate course and grade. Clicking on the "Final Grade Submit" tab will notify study abroad that your grades are complete. Inform study abroad of any special cases (i.e. graduation candidates). *See chapter 19 for additional information.*
Record student grades	Study Abroad	Equivalency forms for each student will be created and forwarded to the Registrar's Office for posting. Notes: Grades will not be displayed on student transcript until after the start of the following term.
Evaluation of program	Program Leader	Course evaluations will be available online via The Center for Instructional Excellence. Faculty may review evaluations on the CourseEval site: http://www.purdue.edu/cie/Website%20CoursEval/courseeval
Review expenditures	Business Manager	Verify that all expenses have been processed. Run t-code **FMPR_RFFMEP1AX** (All Postings) to review all of the income and expenses that have posted. If a credit card was set up for this program; reconcile the credit card transactions with the receipts. Refer to the Purchasing Card Handbook located at: http://www.purdue.edu/business/procurement/pdf/pcardhbk.pdf
Evaluate account balance	Business Manager	Once the program has concluded and all expenses have posted, review the financial status of the program account. **Excess Funds in a 2204xxxx** Program Account Positive balances in a 2204xxxx account may be moved to a 2204xxxx contingency fund for future program. Additionally, the balance may be left in the program account to fund future programs. **Overdrafts in a 2204xxxx** Program Account Overdrafts in a 2204xxxx account should be covered from general funds in the department or 2204xxxx contingency fund.

Overall Program Deadlines

Program Period	Proposal Due Date	Rate Request Due Date	Student Application Deadline
September – December (*Fall*)	March 1st prior to program	June 1st prior to program	August 1st prior to program
January – April (*Spring*)	July 15th prior to program	October 1st prior to program	December 15th prior to program
May – August (*Summer*)	November 1st prior to program	February 1st prior to program	March 1st prior to program
NOTE: Winter Break programs follow Spring semester dates.			