

## ROUTING YOUR DEPARTMENTAL STUDY ABROAD PROGRAM RATE REQUEST FORM

NOTE: If you are new to DocuSign, you can utilize the Quick Reference Cards posted here:

<https://spa2013.itap.purdue.edu/itea/docusign/Pages/DocuSign%20Support.aspx>

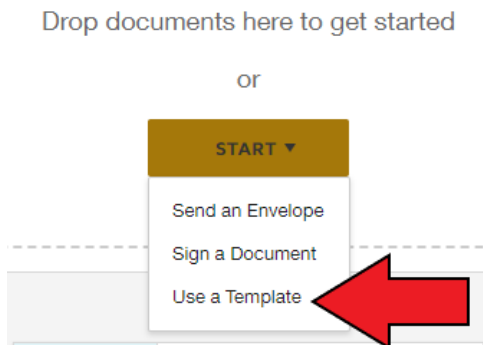
At this time we recommend you fill out the rate request form in its Excel format and only upload it when it is ready for routing for signatures. Please note: rate request forms for multiple programs should NOT be submitted all together in one file – they should each be contained in their own file and sent for signatures separately. **Please use this file naming convention: RR-COLLEGE-PROGRAM LEADER LAST NAME-TERM-COUNTRY**

1) Log in to DocuSign <https://one.purdue.edu/task/all/docusign>

2) After logging in, click on the “START” button in the middle of the landing page.



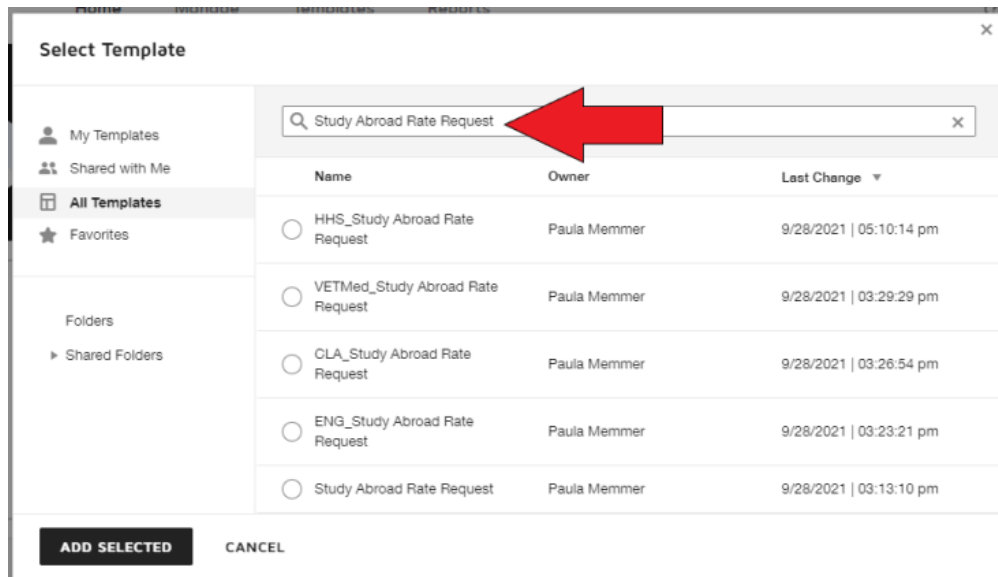
3) Click on the “Use a Template” option in the drop-down menu.



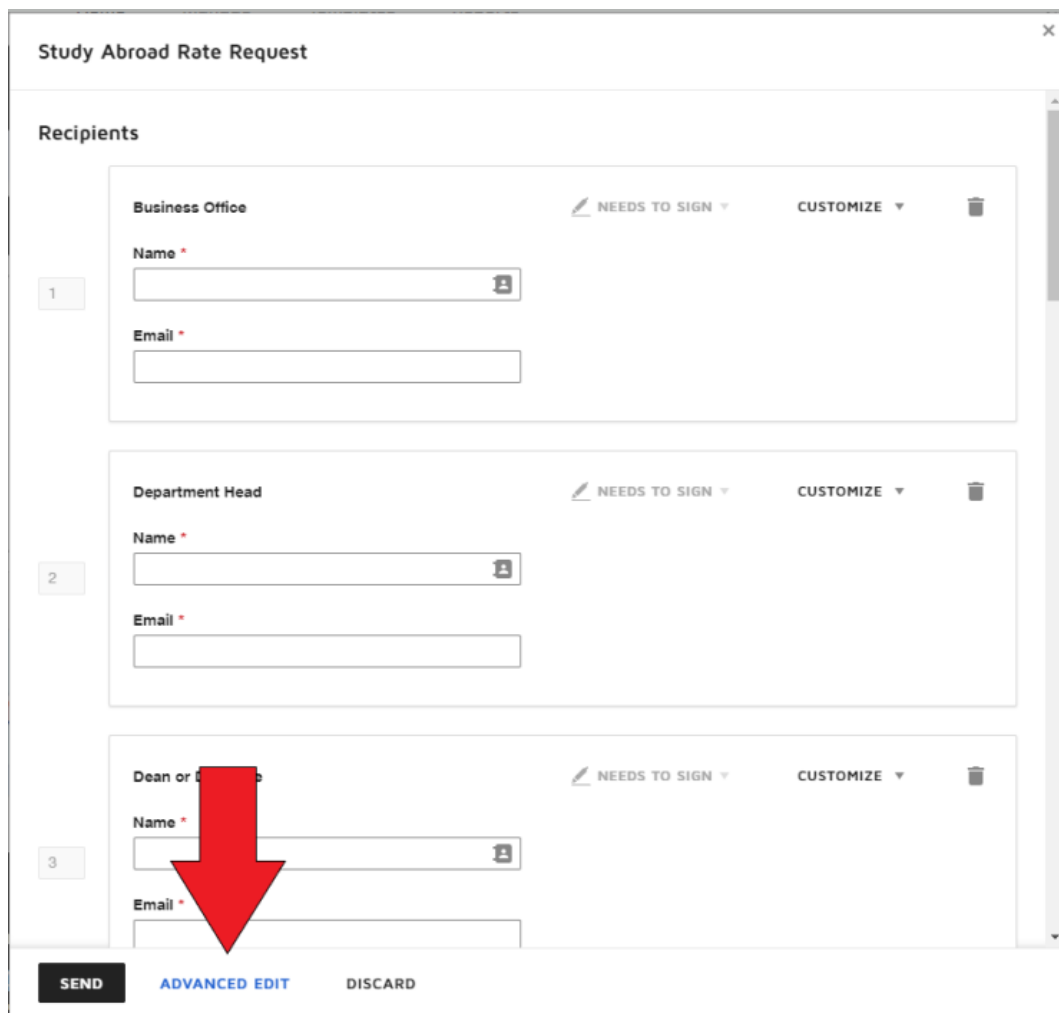
4) Click on “All Templates” on the left side of the box that pops up in the middle of the screen.



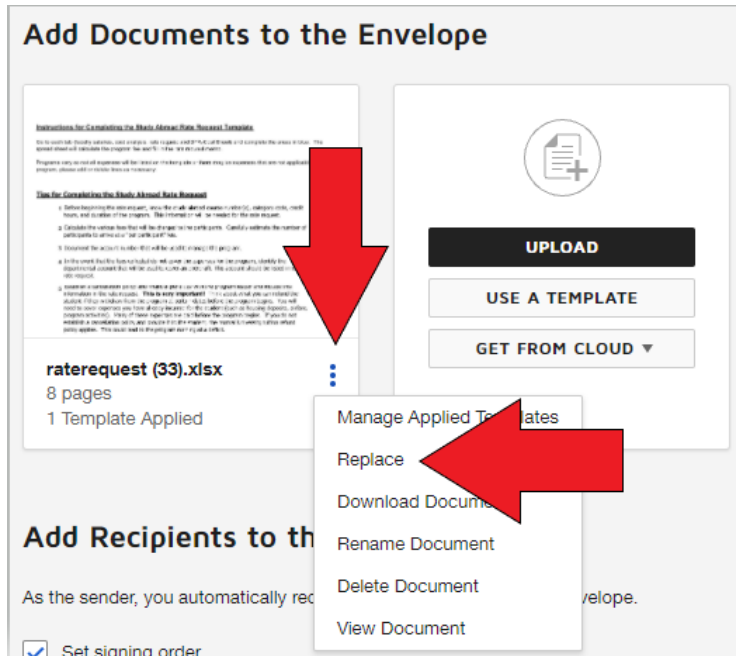
5) In the search bar type in “Study Abroad Rate Request” and hit enter. Click the radio button next to the name of the template you need and then click on the black “ADD SELECTED” button in the bottom left corner of the box.



- 6) The box will change to a new one where you can edit the recipients. Do not make any changes yet – just click on the “ADVANCED EDIT” button in the bottom left area of the box. It does not appear to be a button, but the text will turn blue when you hover over it indicating it is an option you can use.



- 7) Click on the three dots (More options) for the document already in the envelope and select replace.



- 8) At this point you will likely get a pop up that says “Change to Applied Template” – click the CONTINUE button in the box.
- 9) Upload your completed and saved Rate Request. **Please use this file naming convention: RR-COLLEGE-PROGRAM LEADER LAST NAME-TERM-COUNTRY**
- 10) After your Rate Request has been uploaded, please enter the routing for signatures for your department. Please note that you can add additional required signatures after Paula Memmer’s place in the signature flow, but please do not alter the order of the signatures and CC’s populated in the template.

1	<p><b>Business Manager</b> <span style="float: right;">✍️ NEEDS TO SIGN ▼ CUSTOMIZE ▼ 🗑️</span></p> <p>Name * <input type="text"/></p> <p>Email * <input type="text"/></p>
2	<p><b>Department Director of Financial Affairs or designated ADFA</b> <span style="float: right;">✍️ NEEDS TO SIGN ▼ CUSTOMIZE ▼ 🗑️</span></p> <p>Name * <input type="text"/></p> <p>Email * <input type="text"/></p>
3	<p><b>Study Abroad Program Manager</b> <span style="float: right;">✍️ NEEDS TO SIGN ▼ CUSTOMIZE ▼ 🗑️</span></p> <p>Name * <input type="text" value="Paula Memmer"/></p> <p>Email * <input type="text" value="pmemmer1@purdue.edu"/></p>
4	<p><b>Department Head</b> <span style="float: right;">✍️ NEEDS TO SIGN ▼ CUSTOMIZE ▼ 🗑️</span></p> <p>Name * <input type="text"/></p> <p>Email * <input type="text"/></p>



- 12) Review the signature fields to make sure they are placed correctly in your document. If you have uploaded a rate request document that has the pages in a different order than the template document, these fields will not line up. You can either re-order the pages in your original document and then re-upload it, or you can drag the colored boxes to where they should be located

PURDUE UNIVERSITY Inter Office Memorandum  
(Department) Business Office

To: Kristi Mickle, Executive Director, Finance and Business Operations

From: Business Manager

Date: 10/9/2023

Re: Request for Non-Traditional Fee Rate Approval  
Program Name

**Department:** Department Name

**Effective Date:** Study Abroad portion: Dates of overseas portion  
On campus portion: Dates, times and location

**Course Offerings**

SA Course #	Category Code	Credits	Title
UG SA Course #	"N" or no code	# credits	Program Name
UG SA CRN			
GR SA Course # (if applicable - delete if not)			Instructors
GR SA CRN			Professor/staff Name

Item	Proposed Rate	Text
Study Abroad Fee	0.00	
Program Fee	#DIV/0!	
Insurance	0.00	
<b>TOTAL</b>	<b>#DIV/0!</b>	

Account number:

**Account to be used for income and expense:**

Program fees and insurance will be transferred to Department Name from the Bursar fee income account to cover instructor expenses and other program costs. Department Name will be responsible for any budgetary shortfall. A significant projected shortfall due to low student participation may result in program cancellation.

- 13) After verifying the signature and initial fields are where they should be, click the yellow "SEND" button in the upper right hand corner.



- 14) That's it! You will receive a notification that the document has been completed after all parties have signed off on your rate request form. This notification email will include a link to your form where it is stored in DocuSign.