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.purdue.edu/IPPU/SA/_Documents/DeptNutsBoltsManual.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 Action Plan 3. preliminary itinerary 4. preliminary budget 5. Study Abroad Program Proposal Form Additional information regarding the proposal can be found in Chapter 2 of the Nuts and Bolts Manual and via the Proposal Overview.
Gain approvals for proposed program	Program Leader and Business Manager	Signatures are required on the Approval Form from the following individuals: 1. Department Business Office 2. Head of the academic department sponsoring the program 3. Dean of the college 4. CILMAR Intercultural Learning Specialist 5. Director of Study Abroad NOTE: Each department approving credit must sign the proposal.
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 program is offered to both undergraduates and graduate students
Communicate study abroad course number(s)	Study Abroad	SA course number may be found on the approved proposal and on the webpage for the program. 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.*

Quick Reference Guide

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

Establish an account for the program	Business Manager	Study Abroad programs are set up in Unrestricted to Department General Order Type. If a new Funded Program needs to be established, the Business Manager should request it throughMaster Data in SAP using tcode KO01. https://sharepoint.purdue.edu/sites/treasurer/bpr/training/Shared%20Documents/KO01%20-%20Create%20Internal%20Order%20QRG.docx Please remember to use the following when setting up your funded program: Order Type = URST (Unrestricted) Department Account Classification (DAC) = Operating – Allocated Institution Attribute = Study Abroad
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?
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. Senior Director of Finance, Executive Office *Submit electronic copies via DocuSign to Study Abroad.
Distribution of approved rate request	Director of Business Managers – via DocuSign	Copies will be distributed to: 1. Business Manager 2. Study Abroad Office 3. Bursar' 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*
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.

Quick Reference Guide

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

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*.
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 Purdue Moves Scholarships	Study abroad Office	Review student applications and notify students of scholarship eligibility.
Notify Division of Financial Aid of **Purdue Moves Scholarships**	Study Abroad Office	Purdue Moves Scholarships are entered into the DFA database for awarding eligible students.
Apply scholarship to student's account	Division of Financial Aid	Credit student's account with scholarship information.
Registration for the Program	Study Abroad Office	The Study Abroad Office will register students for the appropriate SA course.
Confirm registration	Students	Students are required to confirm registration. Students will incur a $200 late fee if not registration is not confirmed, and they are dropped.
Students billed for program fees	Bursar Office	Once registered for the program via MyPurdue, students are billed via their Purdue Bursar account based on the approved program rate request.
Transfer program fees received to department account	Bursar Office	After registered 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. 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: https://www.purdue.edu/procurement/card-services/purchasing-card.php
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
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 (may be completed via program leader page) 3) Confirmation of insurance ordered 4) 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 an international 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.* Domestic programs will complete the Form RM05 and submit to Risk Management.
Distribute insurance cards to each student	Program Leader / Business Manager	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.*

Quick Reference Guide

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

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.
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 may 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: https://www.purdue.edu/idp/courseevaluations/CE_Faculty.html
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: https://www.purdue.edu/business/procurement/Purchasing_Card/index.html