

SHSU Office of International Programs

Study Abroad Admin. Checklist for Faculty, Departments, and Colleges

Prior to Program Departure (All timeframes given are meant for summer programs):

- Submit New Fund Request** – NEW programs only; use Department Org. in appropriate field; routing on form (Purpose of document is to request new Fund for a new study abroad program. Department study abroad FOP that is no longer in use cannot be reused for a new program, an NFR must be completed).
Timeframe: OCT/NOV for summer programs
 - Submit Change of Budget Request** – routing on form (Only necessary if program budget must be increased or decreased from original Budget Request. Check with Faculty Leader or OIP if unsure of necessity. If final program expenses are more than the original budget requested, payment cannot be made to vendors until the Change of Budget is processed. The Budget Office will not increase a budget unless the funds (student fees) have been collected. OIP should be contacted if there are any questions regarding the collection of student fees).
Timeframe: Depends – should be submitted, if needed, as soon as final roster of students is known as this is usually the largest impact on program budget (i.e. more students than originally anticipated results in the collection of more fees, which means the budget must be increased accordingly).
 - Submit Vendor Maintenance Form/Substitute W-9** – NEW vendors only; routing on form (Faculty Leaders rely on external vendors to make travel arrangements for their programs, and they must be paid for those services. For any new vendors to be paid, this form must be completed and submitted prior to the payment request. May wish to check with OIP or Disbursement Services to determine if vendor has a current VM on file).
Timeframe: usually NOV-FEB or as soon as vendor information is known.
 - Submit Travel Requisition** (The standard SHSU international Travel Requisition process must be completed for a faculty-led study abroad program. Final student rosters must be known before submission. OIP will collect student Waivers and Emergency Contacts).
Timeframe: usually JAN-MAR or as soon as final roster of travelers is known
 - Submit Class Schedule Maintenance Form** – [route to Registrar](#) (This form allows the creation of the study abroad courses in Banner so that students may register).
Timeframe: JAN-MAR
 - Submit Direct Payment Form** – routing on form
Timeframe: usually MAR-APR after vendor invoice(s) is received
 - Submit Outgoing Wire Form** – routing on form (May not be necessary if payment is not being made by wire transfer)
Timeframe: usually MAR-APR after vendor invoice(s) is received
 - Submit Travel Cash Advance Request** – routing on form (Allows the Faculty Leader to request a cash advance prior to travel, if needed).
Timeframe: usually MAR-APR after Travel Requisition has been submitted
- Post-Program:
- Submit Faculty Expense Report(s) and Accountability Form** (Standard university Expense Report used to reconcile travel expenses. Accountability Form will need to be used for any group meals purchased for the students by the university).
Timeframe: 2 weeks after return
 - Work with Disbursement and Travel Services as needed for budget reconciliation** (OIP may also be involved in this process as needed. Once budget is reconciled, OIP must be alerted. OIP will refund any amounts remaining in the program FOP to students in excess of \$10 per student).
Timeframe: 1-3 months after return

Clarifications:

1. This list is not meant to be taken as exhaustive. There are other documents that Faculty Leaders are responsible for submitting to OIP. Other documents required for the program development process are not mentioned on this checklist – the OIP study abroad faculty information webpage should be consulted.
 - a. <http://www.shsu.edu/dept/international-programs/study-abroad/faculty-led-programs/information-for-faculty.html>
2. All forms mentioned on this checklist have been removed from the OIP website and the most up to date versions are available at:
 - a. <http://www.shsu.edu/intranet/policies/forms/>
3. When invoices from vendors are received and the payment process begins, ensure that the invoices reflect correct information. Items to look for are correct sums of the per student costs, correct numbers of students listed on the invoice, and that the invoice is clearly marked as such. Ideally, an invoice should list each traveler individually as faculty costs could differ from that of the students. If you have any questions or concerns about information on invoices, please do not hesitate to contact the Faculty Leader and/or OIP for assistance. It is strongly recommended that any invoice is sent to the Faculty Leader and/or OIP prior to payment for verification of the information.