MISSOURI S&T
STUDY ABROAD SHORT-TERM FACULTY-LED PROGRAM
PLANNING MANUAL

Thank you very much for your interest in planning a faculty-led short term study abroad program. The efforts of the program director(s) are the single largest determining factor in the success or failure of a short term program.

Study abroad short-term faculty-led programs (hereafter called short term programs) are programs where Missouri S&T faculty or adjunct faculty provide some or all academic instruction for course(s) abroad for Missouri S&T credit. These programs are typically scheduled during summer or a break between semesters.

In accordance with the University of Missouri’s Collected Rules and Regulations, Missouri S&T’s Chancellor has assigned Dr. Jeanie Hofer, Associate Provost, International Affairs, the responsibility of reviewing and approving all proposed study abroad programs involving Missouri S&T students. This designation is outlined in the University of Missouri System’s Collected Rules and Regulations 210.070 Guidelines for University of Missouri Related International Programs

It is of utmost importance that Missouri S&T study abroad programs follow Missouri S&T’s academic standards and best practices for student health, safety, and security.

To initiate a Study Abroad Short-Term Faculty-Led Program, program director(s) should submit:
- 1 printed version of each form and attachments with original signatures to Office of International Affairs/Study Abroad, 104 Norwood Hall, Attn: Robin Ziegler
- Electronic version of completed form and attachments (no signatures required) to studyabroad@mst.edu.

Form 1 – Proposal Form
Form 2 – Planning Budget Form
Form 3 – Marketing and Terra Dotta Brochure Form
Form 4 – Safety, Risk Management, and Insurance Form
Form 5 – Final Itinerary, Travel, and Lodging Form
Form 6 – End of Trip Debriefing
Form 7 – Final Budget and Expenditures (to be completed by Study Abroad)
Form 8 – Survey Results (to be completed by Study Abroad)

The forms, this planning manual, and a field guide are available online at http://studyabroad.mst.edu/facultyledprograms/. If the program you are proposing requires modification to one or more of the forms such as more than two program directors or more than two courses, please contact Missouri S&T Study Abroad Office to request customization of the form(s).

Proposals will be reviewed and approved by the Study Abroad Advisory Committee, Dr. Jeanie Hofer, Associate Provost, International Affairs, and study abroad staff members. Other university parties may also be invited to provide feedback as appropriate, including, but not limited to, Risk and Insurance Management, Accounting/Finance and Administration, Dean, and/or Provost. If revisions are necessary the program directors may be requested to submit a revised proposal for additional review. Program directors will receive an email notification from Study Abroad once the proposal has been approved. Programs may not be promoted and cost information must not be circulated prior to notification of approval.

Once information has been submitted and the proposal is approved, if changes are made which will change the locations of travel, dates of travel, or make a significant impact on the academic content, the program directors are required to notify the Office of International Affairs and new or updated forms may be required.
CRITERIA FOR EVALUATING PROGRAM PROPOSALS

1. The proposal adheres to all requirements specified in this Planning Manual and program forms.
2. The program is proposed in one or more locations that
   - Meet Missouri S&T safety and health requirements
   - Interest Missouri S&T students
   - Provide educational and cultural learning opportunities that align with program objectives
3. The program meets Missouri S&T academic requirements, as demonstrated by program approval given by the Dean’s Office and course approval given by the Registrar’s Office.
4. The program provides ample opportunity for participants to engage in local cultures and gain international perspectives.
5. The design of the program (date, length, location, course offerings, cost, etc.) is conducive to Missouri S&T student interest, participation, and university-level learning.
6. Course instructors are qualified to provide instruction in the fields and topics covered by the coursework.

STUDY ABROAD ADVISORY COMMITTEE MEMBERS

The Study Abroad Advisory Committee is a volunteer committee of campus representatives that promote study abroad. Members include:

- Mr. Tim Albers, Vice Provost and Dean for Enrollment Management
- Dr. Jeff Cawlfield, Vice Provost of Undergraduate Studies
- Dr. Greg Gelles, Department Chair, Economics
- Dr. Francisca Oboh-Ikenobe, Interim Chair, Geosciences and Geological and Petroleum Engineering
- Dr. William Schonberg, Professor, Civil, Architectural and Environmental Engineering
- Dr. Philip Whitefield, Department Chair, Chemistry
- Dr. Jeanie Hofer, Associate Provost, International Affairs
- Ms. Susan Potrafka, Senior Assistant Director, International Affairs
- Ms. Robin Ziegler, Study Abroad Coordinator, International Affairs

NATIONAL STANDARDS

Program directors are encouraged to review these standards and queries as they may assist in the development of a strong study abroad program.


UNIVERSITY OF MISSOURI POLICIES


Guideline on Study Abroad in Sites under State Department Travel Warnings. The University of Missouri does not support study abroad programs to countries for which the U.S. Department of State have issued travel warnings. https://www.umsystem.edu/ums/fa/management/risk/guidelines-studyabroad Exceptions to this guideline requires approval of a waiver by Missouri S&T’s provost. Please contact Missouri S&T’s Study Abroad Office for additional information about the waiver process.
When developing a short term program, the program directors have the option to design, plan, and budget on their own or to work with a program provider (third party provider). If a program will be located in a city or region where program directors have a lot of experience and have traveled recently, or if they already have an on-site contact, then personally arranging logistics is feasible. If a program is being developed for a location where program directors have limited familiarity or have not visited recently and do not plan to visit before bringing students, then a program provider is advisable.

Program providers are private organizations or companies which provide services ranging from the full design and coordination of the program to arranging logistics and travel. These providers draw on their expertise and in-country staff, business contacts, and facilities (classrooms, residence halls, etc.) to assist with program design, logistics, and marketing as well as health and safety risk management. Please note that:

- Providers allow faculty to focus on academic components of the program while they organize travel, housing, classroom space, and excursions or activities upon request.
- Working with program providers simplifies the program development process but will also increase the per student cost and may require larger group sizes and advanced booking.
- Program directors can request quotes from providers without committing to a contract.

Program providers can typically provide the following types of support. When planning a program with a third party provider, the program directors may often select the level of support to be provided by the third party provider.

- Assists with selecting location(s) that will reinforce the academic focus
- Assists with developing a schedule that maximizes use of the time abroad
- Finds and reserves appropriate classroom and living spaces
- May design and print brochure or other marketing materials
- Conducts in-country student orientation and provides on-site information
- May arrange flights and airport transfers upon arrival and departure
- Arrange in-country travel
- Organize and oversee home stays or other housing arrangements for both students and program directors
- Rents classroom and office space and oversees education equipment needs
- Arranges logistics for field trips
- Carries the necessary liability insurance
- Implements health and safety measures on-site

Missouri S&T Study Abroad staff members can provide information about possible program providers or university partners, many of whom will provide housing, classroom space, and program assistance at a lower cost than using a program provider.

Program directors that choose to work with a provider should request a sample contract early. This sample contract should be provided to Study Abroad staff members who will request a legal review so that any legal issues can be addressed early in the process.

AGREEMENTS AND CONTRACTS

All agreements and contracts require review and approval by the University of Missouri General Counsel’s Office. All agreements and contracts must be signed by a staff member within the Office of the Vice Chancellor of Finance and Administration who has been delegated the authority to sign on behalf of Missouri S&T. Program directors are cautioned against signing documents on behalf of the university as it may result in individual legal responsibilities.

To request approval of an agreement or contract which will allow payment to a program provider or someone providing a professional service during the program, the program director should complete the appropriate
agreement request. If a service provider has their own agreement or contract that requires university signature, please include this document when submitting the appropriate request to Business Services. Information about agreements for services is available from the Business Services web page at http://financeadmin.mst.edu/bs/. Program directors should research and include all insurance coverage maintained by the third party provider when submitting a request for a professional services contract.

If payment will be made to a company, a professional services agreement can be requested online at http://financeadmin.mst.edu/profsvcsgagre/. In addition to the professional services agreement, an IRS Form W8-BEN-E must be submitted for each company if payment will be made by university check or wire transfer.

If payment will be made to an individual, an independent contractor agreement can be requested online at http://financeadmin.mst.edu/media/campussupport/adminservices/documents/Independent_Contractor_form6_wip_004.pdf. In addition to the independent contractor agreement, an IRS Form W8-BEN must be submitted for each individual if payment will be made by university check or wire transfer.

Information about the W8-BEN and W-8BEN-E forms is available from University of Missouri Accounts Payable Shared Services at https://www.umsystem.edu/oei/sharedservices/apss/suppliers/w_8_and_w_9_instructions. Payments made by credit card or PayPal do not require a W-8 form.

A copy of all signed contracts and agreements and completed W8 forms must be provided to International Affairs before payment for services may be made.

GLOBAL STUDIES MINOR
Students at Missouri S&T can earn a minor in global studies by completing 12 hours of coursework and an international experience. Information about the minor is available online. In order for a short term program to meet the international experience requirement, students must be abroad for a minimum of 14 days, not counting travel time. Program directors are encouraged to promote the global studies minor and to plan short term programs that meet the 14 day in-country requirement.

TRAVEL
Program directors may choose to have all participants travel to the destination together or may choose to have participants meet at the first travel destination. Benefits of group airfare may be that the deposits are waived, the airline may guarantee a base fare, name changes can be made in case of student additions or cancelations, and other discounts may apply. This type of booking may also make the task of early returns for an emergency situation easier. If students are required to make their own flight arrangements approximate cost must be clearly stated in the student budget and information about meeting location, date, and time must be provided to students. Students will be asked to load a copy of their itinerary in the globalminers application, program directors should either print a copy of this itinerary or maintain a list of students’ flight information. Students who travel on their own should also be provided clear instructions on how to contact program directors during travel and if there are difficulties meeting the group.

The Study Abroad Office can provide information on travel agents which have previously been utilized for group travel. This office can provide a limited amount of support with arranging group travel.

HOUSING / ACCOMODATIONS
Housing / accommodation varies widely among programs. Typically hostels and hotels are most convenient but programs can also take advantage of host family situations, camping, and university dormitories in the host country, if available.

Program directors are required to stay on-site with participants. If program participants are staying in a hostel or university housing, for example, at least one program director must stay at the same location as the students.
If participants are staying with host families, the program director(s) must stay in the same general locale as the participants and must be able to easily and quickly respond to an emergency. Host family or home stays require additional diligence in making sure the accommodations are suitable for program participants and meet safety, health, and security requirements.

**MEALS**

Programs may choose to include all, some, or no meals in the program cost. It is often less expensive for students to pay out-of-pocket for meals based on their own spending budgets. Group meals can be included when program directors feel it is appropriate. Student meals should not be budgeted using per diem rates, but instead based on actual costs.

Program information should clearly state which meals, if any, are included as part of the program fee and give accurate cost estimates for remaining meals so participants can plan accordingly.

Some accommodations will include breakfast, snacks, or evening meals. Making use of lodging which includes some meals can help reduce the overall cost of the program to students.

Program director meals may be included in the cost of group meals or meals provided as part of the shared expenses which are part of the program fee. Other meals should be reimbursed at the current per diem rate for the location as part of the normal travel reimbursement process.

The purchase of alcohol, including wine with meals, will not be reimbursed. Program directors may not purchase alcohol for any program event or provide alcohol to students under any circumstances.

**EXCURSIONS AND ACTIVITIES**

Excursions, activities, site visits, and field trips are an integral part of a short term program. Excursions and activities should be relevant to the learning objectives of the program, take advantage of local resources, and be realistic in terms of time, distance, and cost. Descriptions of each excursion and activity should be included in the program itinerary. Excursion and activity costs for program directors and program participants should be budgeted into the program costs.

When planning activities for your program, please keep the safety of students as a top concern. Program directors must plan for participant safety. Most injuries and deaths that occur while studying abroad happen during water activities such as swimming and during transportation of participants. For example, water activities or free time may require a buddy system. For some other activities, it may be appropriate to make participation optional or provide opportunity for a different activity.

If you are planning an activity which has an above average level of risk, please contact Study Abroad to discuss risk management. Study abroad staff members can assist with contacting University of Missouri System's Office of Risk and Insurance Management for guidance. If in doubt, please check it out.

Some short term programs may include excursions, activities, or transportation which require a certain level of capability. Examples are if participants must be able to hike 5 miles in rough terrain, climb 300 steps, or if the group will be use considerable amount of public transportation such as buses and subways that may not be handicap accessible. It is important to include this information in the program brochure and marketing information. Study abroad staff members can include information in the online application if requested by the program directors.

Don’t forget to allow time in the schedule for down time, self-exploration, shopping, and socializing.

**DISABILITY SUPPORT AND ACCOMMODATION**

Missouri S&T is committed to promoting academic success and personal growth for students of all abilities. If a student needs accommodative services for a disability during a short term program, please encourage the student to meet with staff in Missouri S&T's [Disability Support Services](#). Working together, disability support
staff members, program directors, and study abroad staff members can develop a plan to support student success.

**TITLE IX**

Title IX requirements apply the same during short term programs and when off-campus as they do on campus. Program directors and other university employees participating in a short term program are mandated reporters and must notify the Missouri S&T Title IX Coordinator of any incidents of sexual harassment (including sexual misconduct) or behavior which could be characterized as sexual harassment when perpetrated against a student, faculty, staff, or other participant in the short term program.

Program directors should review and understand information about Title IX before departing for the short term program. Detailed information is available on the Title IX – Sexual Discrimination website.

Additional information, including contact information for Missouri S&T’s Title IX Coordinator, is provided in the Field Guide for Program Directors.

**CLERY REPORTING**

Missouri S&T is required to report crime statistics for any location where a student stays for more than 1 night outside of Rolla on a university sponsored trip. If the trip includes faculty or staff members accompanying students, the faculty or staff members are required to submit the report. Information must be reported for locations within the U.S. as well as international locations.

- Date(s) of stay
- Hotel information – hotel name, address, and room number or floor that was occupied
- Facility information for any location rented by the University for class study or program use – name and address
- Local law enforcement information – name and address

A reporting form will soon be added to the University Police web page - [http://police.mst.edu/](http://police.mst.edu/) - under Programs and Services. Until the online form is available, please send information or questions to:

Mary Watkins, Compliance Coordinator, University Police  
E-mail: marywatkins@mst.edu  
Phone: 573-341-6735

**COURSE INFORMATION**

Courses for the short term program must meet the same academic requirements as all other Missouri S&T courses. One hour of credit for a lecture course requires 750 contact minutes (12.5 hours). Contact minutes may occur before, during, and after travel and may include lectures by the program directors, class discussions, and supervised cultural activities. Lectures by experts in countries visited are especially encouraged.

Courses may be current courses or developed specifically for the short term program. If course is a new course, please complete the Experimental Course (EC) form and process. The form and process is available from the Registrar’s website at [http://registrar.mst.edu/currcom/forms/](http://registrar.mst.edu/currcom/forms/).

Courses taught as part of a short term program are regular Missouri S&T courses and will be listed on the student’s transcript as a Missouri S&T course.

**POSTING GRADES**

Missouri S&T assigns all short term programs to a semester. For example, short term programs that go abroad after the spring semester ends will be assigned to the summer semester and short term programs that go abroad during the break between fall and spring semesters will be assigned to the spring semester.
Grades for course taught as part of a short term program should be posted following the same schedule as other classes for the semester to which the course is assigned.

Because of this, program directors should clearly communicate to students when grades will be available and the semester for which the course will be listed on the student’s transcript.

**APPLICATION PROCEDURE**

Students interested in participating in the short term program are required to complete and submit an application through [globalminers.mst.edu](http://globalminers.mst.edu). All applicants must be approved by a program director through the online system.

Missouri S&T students will sign into [globalminers.mst.edu](http://globalminers.mst.edu) using their Missouri S&T user id and password to complete their application.

Others who have an interest in enrolling in the program, such as students enrolled in another institution, non-degree seeking students, and interested community members, may apply to Missouri S&T as a visiting student. Once admitted as a visiting student, an application can be submitted for the program.

Participants who are under 18 years of age at the time of application must receive written parental consent and approval from program directors. Please contact study abroad staff members for risk, liability, and permission documentation that is required for participants under the age of 18.

Please refer to the section on non-enrolled participants for anyone planning to participate in the trip but not enroll in the course(s).

Participants who have been admitted into the program by the program director will receive an email notification through the online application system, [globalminers.mst.edu](http://globalminers.mst.edu). Study abroad staff members will coordinate this notification with the program directors.

**ENROLLING STUDENTS IN COURSE**

Students who have been accepted into program will be enrolled in the course(s) by study abroad staff members and the Registrar’s Office. Because the courses for the program are only open to students who have been accepted by the program directors, the courses are not available for open enrollment through Joe’Ss.

Participants who wish to enroll in a hearer status are required to pay full fees for the course(s) in which they are enrolled but are not entitled to credit for the course(s) and none of the work will be graded. If a participant wishes to participate in a hearer status, he/she must obtain the permission of the instructor in charge of the course and complete the [Authorization for Pass/Fail or Hearer (Audit) Grading Form](http://Registrar’s Office).

**PLANNING BUDGET**

All short term programs are to be self-supporting, which means all related expenses should be paid through tuition, program fees, or external funding from the academic department, Dean’s Office or other external source. At the same time, making sure the programs are affordable for students is also important.

Form 2 Planning Budget Form provides program directors with spreadsheets to assist in estimating program director expenses and calculating a program fee.

Things to consider when completing Form 2 Planning Budget include:

- Be as inclusive of costs as possible. List every cost that may be incurred.
- Update costs as more information is gathered. Form 2 is required as one of the first documents in the planning process. However, the information on Form 2 will continue to be updated as costs are
finalized. Form 2 is meant to be a working document and to be updated as needed. It is helpful for program directors to provide updated costs every 2-4 weeks to study abroad staff members.

- If the tuition expected to be generated by the participants of the program will not cover the expected expenses such as salary, benefits, and travel expenses of the program director(s) and any assistants, the additional cost should be included in the program fee to be split among student participants.
- Any tuition funds remaining after payment of a salary, benefits, and expenses will be split 50/50 between the Dean’s Office and the Office of International Affairs.
- Students will be charged a program fee sufficient to cover expected costs that will be paid by the program. Items which may be covered by the program include, but may not limited to, lodging, meals, in-country travel, health insurance, and activities/entrance fees, etc.
- When calculating the program fee, it is best to use the minimum number of students required to make the program financially feasible. If more students participate in the program, it is easy to reduce the last payment to the lower amount based on number of students participating. It is much more difficult to tell students the cost will be more than they anticipated.
- Form 2 includes the opportunity for program directors to include a contingency fee. At a minimum, a contingency fee of 10% should be included. Program directors may wish to consider including a higher contingency fee if the currency conversion rate is volatile, if costs for accommodations, transportation, or other large cost items have not been finalized, etc. Funds from the contingency fee will be available during the program to cover unexpected costs, costs that increase, or costs not covered by the initial program fee. After the program has completed and all expenses related to the program have been paid, remaining contingency funds will either be returned to each student if the amount is $50 or more per student, or put into an emergency contingency fund. Once the emergency contingency fund has reached a balance of $3,500, additional funds will be available for use as scholarships.
- Programs which do not have the required number of students for budget break even by the deadline to enroll will be canceled or must receive approval from the Dean’s Office and the Office of International Affairs to proceed. Before this approval is given, an agreement will be reached how any costs not covered by the tuition generated from student participants and program fees will be covered.
- Programs with fewer than 10 students and/or programs that are expected to run a deficit require approval by the Dean’s Office and Office of International Affairs.

If additional fields or lines are needed on the budget form, please contact Study Abroad in 104 Norwood Hall or by email at studyabroad@mst.edu to request customization of the form.

**PAYMENT OF EXPENSES**

Some program expenses such as payment to a third party provider, accommodations, tickets for excursions, and transportation may require payment before the program begins. Other program expenses such as entrance fees and meals paid by the program may require payment while abroad.

Study abroad staff can assist with payments made before and after the program. The program director(s) may be required to make payment for expenses incurred during the program such as meals paid by the program, entrance fees, public transportation paid by the program, etc.

For expenses paid to international vendors by university check or wire transfer, an IRS W-8BEN (for individuals) or W-8BEN-E (for entities) form is required. Program directors should explain the requirement for the form to international vendors early in the planning process. It is important to understand if payment will be made to an individual or an entity / company in order to know which W-8 form is required. The W-8BEN form for payment to an individual is a simpler and shorter form. Program directors should require a completed W-8 form no later than when the agreement is sent for legal review and approval. Payment cannot be made until the appropriate W-8 form has been submitted by the international vendor. Information about the W-BEN and W-8BEN-E forms is available from University of Missouri Accounts Payable Shared Services at
https://www.umsystem.edu/oei/shareservices/apss/suppliers/w_8_and_w_9_instructions. Payments made by credit card or PayPal do not require a W-8 form. The payment process is easier when payment is made using the OneCard or PayPal.

A copy of all signed contracts and agreements and completed W8 forms must be provided to International Affairs before payment for services may be made.

Payment by university check or wire transfer may take several weeks to be received by the vendor due to university processes and mailing time. At a minimum, please allow four to six weeks for payment to be made once a final invoice is received by International Affairs. If payment is required in less than six weeks, please contact Study Abroad to discuss payment due dates and options for payment.

For expenses that require payment during the program, program directors are encouraged to have a university issued MasterCard One Card (purchasing and travel). Information about the One Card, including the application process is available on the UM System Supply Chain web page. You should request the One Card at least 6 weeks before the departure date. The One Card with travel and purchasing access may be used to pay for university related expenses such as entrance fees and meals paid by the program. The One Card may not be used for personal expenses. In order to be able to use the One Card at an ATM, the ATM Access Request form must be submitted for your One Card. All transactions on the One Card require a receipt and must be pre-approved on the program budget. The One Card is a MasterCard and most likely will incur ATM fees and transaction fees when used internationally.

Each program director is responsible for understanding and following the One Card policies for program related expenses. Because the bill for the One Card is paid directly by the university, the reconciliation process includes submitting a receipt for each transaction and reconciliation of the purchases by an approving official.

Other options available to program directors for payment of program related expenses while traveling are using a personal credit card and a cash advance. Information on obtaining a cash advance for travel is available on Accounting’s website. It is recommended that program directors not carry large amounts of cash while abroad. For payments made using a personal credit card, the program director will make payment for the expenses to their credit card company and submit a travel reimbursement request to the university.

Faculty expenses, excluding pay and benefits, should be submitted by each program director on a travel expense report at the end of the program.

Program directors are encouraged to use a transaction log and receipt bag to keep track of expenses. This will make submitting a travel expense report and reconciling the One Card much easier.

**PROGRAM FEE PAYMENT SCHEDULE**

As noted above, some expenses require payment before the beginning of the program. In order to have funds to pay these expenses, program participants are required to pay their program fee before the program begins. Form 3 Marketing and Terra Dotta Brochure Form asks program directors to recommend a payment schedule so that funds will be available before payments must be made for program expenses.

A typical payment schedule would be 25% deposit when student is accepted into the program, 50% approximately 3 months before the program begins and the remaining 25% approximately 2 months before the program begins. This schedule can be modified based on anticipated payments.
MINIMUM NUMBER OF PARTICIPANTS

The minimum number of participants needed to make a program financially viable is based on the program directors’ compensation (salary and benefits) and trip expenses. Form 2 Planning Budget Form provides program directors the process for estimating costs and comparing how differing number of participants will affect the budget.

Program directors are responsible for developing and managing the budget without deficit. The program fees charged to the students are designed to cover actual costs of the expenses required to run the program.

Tuition will be billed at the appropriate rate (resident or non-resident) depending on the student’s status. Form 2 Planning Budget Form allows program directors to see how the tuition rates affect the tuition revenue. Program directors are encouraged to use caution when planning the number of students expected to pay non-resident tuition rates because the change of status of one student can dramatically affect the ability of the program to pay expenses.

As part of the student’s application, each student will be asked to answer if they are a resident or non-resident for tuition purposes. Students will also be asked whether they have or plan to submit a request to change from non-resident to resident prior to the beginning of the program. However, program directors are also encouraged to communicate with non-resident program participants to confirm they will be paying non-resident rates if there is concern about how this change will affect the budget.

BILLING AND PAYMENT OF FEES BY PARTICIPANTS

There are two types of payments required by the student – tuition and program fee.

Course tuition will be billed to students’ university account and will be due according to Missouri S&T policy. General payment information is available on the Cashier’s website. Tuition will be billed at the appropriate rate (resident or non-resident) depending on the student’s status.

Students with questions about financial aid should be encouraged to visit the Student Financial Assistance Office to discuss their individual situation regarding financial aid for a short term program.

Students are required to pay the program fee according to the payment schedule provided on Form 3 Marketing and Terra Dotta Brochure Form. Payment of the program fee will be made to the Study Abroad Office in 104 Norwood Hall.

The program fees paid by students may be used to pay deposits, third party providers, or expenses which require payment before the program begins.

CANCELLATION PROCEDURE AND REFUND PROCESS

If a program is canceled due to lack of participants, students will receive a full refund of the program fee and will not be charged the study abroad fee or Terra Dotta application fee. Once a student has submitted the online commitment through globalminers.mst.edu, if the student wishes to withdraw from the program for any reason, s/he must notify the program directors and Study Abroad Office (104 Norwood Hall or studyabroad@mst.edu) in writing by letter or email. The withdrawal notice must state the reason for the withdrawal. The date of the withdrawal will be the date the notification is received by the Study Abroad Office or the next business day if notice is sent by email after office hours, on a holiday or weekend.

The 25% non-refundable program fee, study abroad fee, Terra Dotta application fee, and any monies spent on behalf of the student wishing to withdraw will not be refunded. Once the program has started, participants withdrawing will receive no refund of the program fee under any circumstances.

NOTE – It is still under discussion what will happen to tuition costs if a student withdraws from the course before the program begins. These funds are needed to pay faculty salary, benefits, and travel expenses for short-term programs and can affect the financial status of an entire program if one student withdraws.
University policy currently allows students to get 100% refund if the student withdraws before a course begins. This situation requires more discussion at a high level. We did not want to delay issuing the Planning Manual while these discussions are on-going.

DRAFT –
As part of the application process, students are required to submit an online Program Confirmation and Conditions of Participation form. This form notifies students they will forfeit the $300 study abroad fee, $30 Terra Dotta application fee, and any non-recoverable costs or losses incurred as a result of their withdrawal from the program. These costs may include transportation, housing, and other fixed group expenses (e.g. program leader expenses).

GLOBALMINERS.MST.EDU AND TERRA DOTTA SOFTWARE
An online system is used to manage study abroad applications and the travel registry for Missouri S&T. We call our system globalminers.mst.edu. The system is managed using a hosted software solution called Terra Dotta. Study abroad staff members will develop a customized program brochure for each short term program based on information and pictures provided by the program directors. This brochure will include information students will need to know about the program such as course information, dates of program, planned activities, and cost. Students interested in participating in your program will apply through this system. Program directors are given access to view and approve applications, send group or individual emails, and review student profile information in globalminers.mst.edu.

Study abroad staff members will meet with the program directors to review application materials and discuss any need for customization. Within the program brochure and application in globalminers.mst.edu, study abroad staff members, working with program directors, can create customized documents for review/signature, learning content, and submission. Within the Terra Dotta software, a wide variety of learning content is available and can be included in the application. For more information about the resources available in Terra Dotta, please contact study abroad staff members.

MARKETING THE PROGRAM
Program directors have primary responsibility for recruiting students for their program. Marketing should begin as soon as a program has been approved, preferably no later than two semesters before the program begins. Marketing for a program may not begin until after the program has been approved.

Program directors are encouraged to use a variety of marketing methods including, but not limited to, the following:

- Classroom presentations and discussions – Talk to your students about the program. Your enthusiasm will create excitement among the students.
- Flyers and posters – Create and post flyers and posters in your department and around campus. Don’t forget to provide several of each to the Study Abroad Office so that we can also post the flyers in our office. Tip – Program directors may wish to include the cost of printing flyers and posters in the shared expenses section of the budget.
- eConnection – Including notices about the study abroad program and information sessions for the program in both the student and staff/faculty eConnection is a free way to market the program.
- Study Abroad Fair – Program directors will be asked to participate in study abroad fairs during the fall and spring semesters. You are encouraged to have a table and/or presentation to promote your program.
- Notices to listserv – The Study Abroad Office is happy to send out notices to the study abroad listserv. Your academic department, the honors academy, leadership and cultural programs, or other organizations or departments may also have listservs that can be used to market your program.
- The Study Abroad Office can share program information with the international offices at the three other University of Missouri campuses, upon request from the program directors.
- Promoting the Global Studies Minor along with your program may also help with recruiting students.
- Study Abroad web page – The Study Abroad Office will create a web page to promote your program or if you prefer to create your own web page, we will link from the Faculty Led Study Abroad Programs webpage.

- Program brochure in globalminers.mst.edu – A customized online brochure will be created in the globalminers.mst.edu system. This program brochure will link to the application and provide potential participants details about the program. Form 3 Marketing and Terra Dotta Brochure Form gathers information from program directors for the creation of the program brochure.

**STUDENT STANDARDS OF CONDUCT**

Participants in a short term program are expected to comply with the same standards of conduct as students who are enrolled in on-campus courses. The Office of the Dean of Students web page includes links to the standard of conduct, rules and procedures in student disciplinary matters, equity resolution process for Title IX and other discrimination, etc.

Should a student conduct issue arise during a short term program, program directors are encouraged to follow the steps in the Field Guide for Program Directors and to contact the Study Abroad Office for support and assistance.

Program directors are encouraged to provide program participants with clear expectations for behavior and participation. At a minimum, these expectations should be communicated to participants during pre-departure orientation, on-site orientation, and as needed during the program. If desired by the program director, the application process can include a listing of expectations for students to review and sign during the application process. Please contact study abroad staff members to discuss including these expectations in the application process.

**NON-ENROLLED PARTICIPANT**

Each person who plans to accompany a short term program and who is not an enrolled student in the program or a program director must submit a completed Faculty-Led Short-Term Study Abroad Program Non-Enrolled Participant Form no later than four weeks prior to the beginning of the program. The form must be completed for any person who participates in any aspect of the program or accompanies a program participant or director. Contact study abroad staff members to request the form for non-enrolled participants.

In addition the meetings and administrative responsibility required before and after the program, program directors should consider that the on-site portion of the program will require constant oversight as part of the teaching and management requirements. Non-enrolled participants also do not contribute tuition towards program expenses. Therefore, program directors are encouraged to carefully consider whether non-enrolled participants, including family members, should be allowed to accompany the program.

Requests to allow a non-enrolled participant to accompany the short-term program require the approval of all program directors and the Dean’s Office of each program director.

Non-enrolled participants are responsible for all expenses associated with accompanying the short term program. These expenses must be paid directly by the non-enrolled participant and cannot be incorporated into the short term program budget and cannot be part of any reimbursement requirement or invoice that is submitted to Missouri S&T.

Non-enrolled participants are required to register their travel through globalminers.mst.edu and pay the corresponding $30 Terra Dotta application fee.

Non-enrolled participants are also required to enroll in health insurance coverage through GeoBlue, the same as all other participants and program directors. Cost and enrollment information is included on the Faculty-Led Short-Term Study Abroad Program Non-Enrolled Participant Form. A confirmation of purchase is required when submitting the Faculty-Led Short-Term Study Abroad Program Non-Enrolled Participant Form.
PASSPORTS
Participants who do not have a passport should apply early. Processing an application typically takes four to six weeks but may take longer. Participants may apply for a passport in person at selected post offices, federal or state courts of record, or at one of the passport agencies of the U.S. Department of State. The closest passport agent is the Phelps County Missouri County Clerk’s Office.

Participants who have passports should be reminded to check the date of issue to be sure the passport will be valid for at least six months beyond the program end date as it is required by many countries in order to enter the country or issue a visa.

The cost of a passport should be included as a possible expense on the Student Budget Worksheet (tab 6) of Form 2. Passport fees are not built into the program budget. Fees associated with obtaining or renewing a passport are considered out-of-pocket expenses.

PERMITS AND VISAS
Any entry or exit requirements related to the host country or countries where a layover may occur should be investigated during the initial planning for the program. Any visa or permit costs should be built into the program budget, usually listed as out-of-pocket expenses. Information about visas can be found on the embassy website for the host country.

Be aware that guidelines and requirements may differ for U.S. nationals and nationals from other countries as well as from jurisdiction to jurisdiction.

STUDENT HEALTH AND IMMUNIZATIONS
If the program itinerary will include activities which may require a certain level of physical fitness or other abilities, the requirements should be included in the program brochure and potential participants should be made aware of the expectations. An example is the expectation that participants must be capable of walking up to 5 miles in uneven terrain.

Students applying to enroll in the short term program are required to submit a health clearance from a licensed health care professional which states the student is healthy enough to participate in the program. Missouri S&T’s Student Health Services provides the health clearance for Missouri S&T students at no cost. Students may also have the form completed by a health care provider of their choice. Part of the health clearance is the requirement for health care providers to discuss health information for the destination country with the student.

With the program director’s request, the application process may include a questionnaire that asks students to self-identify any allergies, dietary requirements, medications, or other health related concerns that the student believes may affect their health while abroad. Program directors are encouraged to pay attention to this information during the application review process so that you can have a discussion with the student if you feel it is necessary. This information should not be used to disqualify a student from being admitted to the program. If you have concerns regarding a student’s ability to fully participate in a program, please contact Study Abroad so that a discussion with Disability Support Services can be scheduled to discuss your concerns further and to develop a plan to support the student’s participation. Additional information about Disability Support Services is available on page 5.

Program directors should also be aware of health issues and required or recommended immunizations for the destination country. The Centers for Disease Control website provides detailed health and immunization information.

Form 4 Safety, Risk Management & Insurance Form collects information about health risks and immunizations for the destination country. This information will be included in the program brochure at globalminers.mst.edu.
INSURANCE
All short term program participants, non-enrolled participants and program directors are required to enroll in health insurance through GeoBlue.

Participants enrolled in the course(s) and program directors will be enrolled in the GeoBlue insurance by the Office of International Affairs. The cost for enrolled participants is included in the program fee and the cost for program directors will be paid as part of the program director expenses.

Non-enrolled participants will enroll in the insurance directly. A confirmation of purchase is required with the submission of Faculty-Led Short-Term Study Abroad Program Non-Enrolled Participant Form.

U.S. DEPARTMENT OF STATE SMART TRAVELER ENROLLMENT PROGRAM (STEP)
The Smart Traveler Enrollment Program (STEP) is a free service provided by the U.S. Department of State to assist U.S. citizens traveling internationally. All participants in short term programs including students, program directors, and non-enrolled participants are required to register in the STEP program. Enrollment in the program allows the Embassy in the destination country to provide important information about safety conditions and allows the Embassy to contact travelers in the case of an emergency.

UNIVERSITY OF MISSOURI TRAVEL REGISTRY
University of Missouri Collected Rules and Regulations 210.070 requires that all students traveling internationally on a university-related trip should register their travel in a university approved travel registry. Faculty or staff members or non-enrolled participants who are accompanying students are also required to register their travel.

Missouri S&T’s travel registry is managed through the Terra Dotta software. Information about the travel registry is available online on the Traveling on Behalf of Missouri S&T webpage.

Enrolled program participants of a short term program will be automatically enrolled in the travel registry through their application and commitment to the short term program. Program directors and non-enrolled participants are required to register their travel in the registry manually. Instructions for registration are available on the Traveling on Behalf of Missouri S&T webpage.

IT CELL PHONE RENTAL PROGRAM
Missouri S&T’s Information Technology Department has a limited number of cell phones that can be rented for short periods on a first come, first served basis. These cell phones can be set up for international calling and the costs can be billed to the short term program. Estimated cost should be included in the program budget. Please call Betty Scantlin in IT at extension 7868 to request information about the cell phone rental program.

PRE-DEPARTURE AND ONSITE ORIENTATION
Program directors are required to provide pre-departure and on-site orientations. The pre-departure orientation should be scheduled for no later than 2 weeks before departure. Study abroad and international insurance services staff members should be included in the pre-departure orientation to provide information about health, safety, and insurance. Other topics to be discussed during the orientations are detailed in the Field Guide for Program Directors.

FIELD GUIDE FOR PROGRAM DIRECTORS
The Field Guide for Program Directors includes information that will assist program directors during the travel and on-site portion of the short term program. The document includes emergency contact information, crisis management, and resources to assist the program directors in handling situations which may arise during a short term program.

Program directors should develop an emergency/crisis plan that is provided to and discussed with all program participants during pre-departure orientation.
A printed copy of the Field Guide for Program Directors will be provided to all program directors approximately two weeks before departure. A link to the document is also online on the Faculty Led Study Abroad Programs web page.

**LEADER TRAINING**

Prior to leading a program, all program directors are required to attend a training session provided by the Office of International Affairs. This session will cover issues such as resources available to assist program directors, insurance, best practices, and safety and crisis management.

**PROGRAM DIRECTOR SKILLS AND RESPONSIBILITIES**

The role of the program director, in addition to a considerable amount of administrative work, requires a wide variety of skill sets that are quite different from those of typical courses. The role of the program director will include the following:

- **Flexibility!** Being able to handle a variety of logistical details as it relates to students, travel, flight cancellations, detours, host cultures, hotel accommodations, etc.
- **Commitment to intercultural learning, global understanding, and responsible citizenship in a global community.**
- **Ability to handle all student service matters and being familiar with all Missouri S&T and University of Missouri policies regarding, among others, emergency concerns, discrimination and harassment, and student standards of conduct.**
- **Organizational and planning skills as well as the ability to keep track of a number of details simultaneously.**
- **Ability to create and manage budgets and account for any cash advances you may request, being mindful that you are operating in a public institution where fiscal matters must be handled transparently and in keeping with university policy.**
- **You are the primary recruiter!** Ability to recruit with enthusiasm as student will enroll if they feel your passion for the topic and international destination – you should spend time speaking with students to promote the program including holding information sessions, participating in the study abroad fair, conducting classroom visits, and other promotional strategies. Study abroad staff members will assist by general emails, sending information to its listserv, creating a brochure and application within globalminers.mst.edu, and posting your program on the study abroad website, but you have primary responsibility for recruiting participants.
- **Good health, to handle the physical and emotional demands of coordinating the details of the program.** Many international programs require physical demands during travel and during the program.
- **Leadership qualities and willingness to take charge of any situation where participants need to be directed rather than consulted.**
- **Appreciation of the increased contact with student that is inevitable during a short term program.**
- **Meet the levels of student care expected at Missouri S&T, including responding to student emotional, mental, or health problems, crises, or emergencies.** Program directors should realize they are involved in every aspect of the program and are often on call 24 hours a day when in country. This can include providing mentorship, emotional support, and guidance to students as needed during the course of the program. Always remember that you are not alone when dealing with difficult situations as there is a team of staff and faculty members at Missouri S&T who are available to assist you. However, as the person on-site with the program, you will by necessity be the first line of response to student needs.

In addition to the skills listed above, the role of program director requires you to fulfill the necessary administrative steps for the proposed program which may include, but are not limited to the following:

- Submit completed forms necessary for the proposal, budget, marketing, safety, and management of the proposed program.
- Meet with study abroad staff members to discuss proposal plans, forms, and process.
- Provide program information requested by the Office of International Affairs, Study Abroad, by the established deadlines.
- Establish course syllabus, itinerary, budget, program fees, and emergency response plan.
Logistical arrangements (through provider, partner, or independently). This will include, but is not limited to, finalizing plans with vendors and/or third party providers, providing a completed W-8 form to International Affairs for each vendor (if required), providing a final invoice to International Affairs for payment (note – payment by check or wire transfer may take up to six weeks), etc.

Marketing and promotion

Provide prospective students with accurate and complete information on the nature and scope of the program

Review student applications and accept applicants in Missouri S&T’s GlobalMiners.mst.edu online application system

Schedule and conduct pre-departure orientation(s)

Manage on-site finances and receipts according to University of Missouri accounting policies

Fulfill required duties while abroad as detailed in the Field Guide for Program Directors.

While program directors are the primary contact person for responding to student concerns about housing, travel, health and safety issues which arise from students, they are not expected to supervise participants 24 hours a day. The program should be set up in an appropriately safe environment where students can be expected to take care of themselves when out of class and/or not on program assignments. Program directors are expected to provide sufficient orientation to the local environment which will enable students to survive in the community without faculty supervision (health and safety, public transportation, money exchange, getting around the city, language, cultural distinctions, food, etc.).

Notify the Office of International Affairs, Study Abroad, in case of any emergency affecting the health, safety, or security of a program participant.

Provide 24/7 emergency contact information to participants for program director(s), back up emergency contact, Missouri S&T Study Abroad Office, nearest U.S. Embassy or consulate U.S. citizens services, and Missouri S&T University Police.

Administer course evaluation

Program directors should discuss questions related to teaching loads with their department chair and/or Dean’s Office.

By submitting a proposal for a short term program, you acknowledge your understanding of the necessary skills and responsibilities and your willingness to fulfil these duties.

PROGRAM DIRECTOR COMPENSATION

Program directors will be compensated as follows. Form 2 Planning Budget Form provides program directors a format for calculating compensation.

- For budgeting purposes, faculty pay will be up to a maximum of $5,001 per 3 credit hour course taught following the formula below. When calculating the cost of compensation, benefits will be added at the then current rate (currently approximately 35%). If a department or Dean’s Office wishes to pay the faculty more, the department choosing to pay the faculty member the higher wages may subsidize the program for that amount (wages plus benefits).
- Faculty salary up to $5,001 per 3 credit hour course and expenses for program director(s) will be paid from the tuition generated by the students participating in the program. Pay and benefits exceeding $5,001 per 3 credit hour course will be calculated separately in the budget and will not be paid from tuition.
- If the number of participants will meet or exceed 15 students per program director, a senior student assistant or faculty/staff member assistant is required to provide the appropriate level of leadership during the program. The costs associated with the assistant will also be paid from the tuition generated by the students participating in the program.
- If a program has 15 or more enrolled students, the program director will receive 100% of the compensation amount up to $5,001. If a program has 14 or fewer students, the program director’s pay will be pro-rated per the chart below.
Faculty pay will be calculated as follows:

Full-time, benefits eligible faculty (T/TT or NTT)
\[(1/30) \times (9 \text{ mo. GRA base salary}) \times (# \text{ credits}) = \text{ compensation amount (salary only, not including benefits) per course} - \text{ up to a maximum of $5,001}\]

Part-time faculty
\[$1,667 \times (# \text{ of credits}) = \text{ compensation amount (salary only, not including benefits) per course}\]

Pro-rated compensation amounts based on course enrollment
15 or more enrolled students in course = 100% of compensation amount
14 students = 97% of amount
13 students = 94% of amount
12 students = 91% of amount
11 students = 88% of amount
10 students = 85% of amount
9 students = 82% of amount
8 students = 79% of amount
7 students = 76% of amount
6 students = 73% of amount
5 students = 70% of amount

Program directors will be provided UM 271 Additional Pay Form to complete electronically. Program directors should notify Study Abroad once the UM 271 form has been submitted. Salary will be disbursed at the conclusion of the program. Pay as described above will be paid from tuition generated by students participating in the program. If the Dean’s Office or other funds are used to supplement the program director’s pay, the funds may either be transferred to Study Abroad so that all pay is processed at the same time or the additional pay can be processed separately by the party providing the funds.

STUDY ABROAD OFFICE RESPONSIBILITIES
- Proposal / budget consultation
- Assist with provider / partner connections
- Financial management
- Marketing / promotion assistance
- Set up program brochure in Terra Dotta software, globalminers.mst.edu/
- Pre-departure orientation (general information)
- Reentry information
- Assist in the case of emergency while the program is abroad
- Additional resources as necessary

OTHER RESOURCES
- Program directors of previous short term programs are a great resource. They can discuss with you what was done well, where they plan to make changes for their next trip, tips, and ideas.
- Alumni who are from the country or working in the area may be available to meet with students or help with logistics.
- Study abroad staff members are here to help you as well. Please contact us if you need suggestions for third party providers, want to schedule a meeting to discuss the proposal process or forms, or if you need a sounding board for your ideas.
QUESTIONS OR NEED MORE INFORMATION?

Missouri S&T Study Abroad staff members are here to assist you in the planning and execution of a short-term study abroad program. While you are abroad, study abroad staff members are your one point of contact for any crisis or needed assistance. We will contact other resources as appropriate.

For additional information or questions, please contact Missouri S&T Study Abroad:

Study Abroad:  studyabroad@mst.edu

Robin Ziegler, Study Abroad Coordinator
Phone:  (573) 341-6237 or (573) 341-6015
Email:  ziegler@mst.edu

Susan Potrafka, Sr. Assistant Director
Phone:  (573) 341-4091 or (573) 341-6015
Email:  susanp@mst.edu

This manual is provided to assist in the development of study abroad short-term faculty-led programs. If you have suggestions or ideas for improvements to this manual, please send them to studyabroad@mst.edu or call extension 6237 or 6015.
### APPENDICES

<table>
<thead>
<tr>
<th>Appendix</th>
<th>Description</th>
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<tr>
<td>Appendix A</td>
<td>Timeline and Checklist</td>
</tr>
<tr>
<td>Appendix B</td>
<td>Participant Deadlines - This form may be customized and given to participants to help them understand when tasks must be completed.</td>
</tr>
<tr>
<td>Appendix C</td>
<td>Terra Dotta User Guide for Program Directors</td>
</tr>
<tr>
<td>Appendix D</td>
<td>Application Review Process – step by step instructions for a program director to review and accept applications in Terra Dotta</td>
</tr>
</tbody>
</table>
# APPENDIX A
## TIMELINE AND CHECKLIST

<table>
<thead>
<tr>
<th>Mark when Completed</th>
<th>Actions</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>18-24 months before program begin date</strong></td>
<td>Faculty member (program director) begins brainstorming ideas and develops concept of the short term program.</td>
<td>Program director</td>
</tr>
<tr>
<td><strong>14-18 months before program begin date</strong></td>
<td>Faculty member (program director) requests meetings with study abroad staff members to discuss ideas and plans for short term programs.</td>
<td>Program director</td>
</tr>
<tr>
<td><strong>12-14 months before program begin date</strong></td>
<td>Form # 1 Proposal Form due</td>
<td>Program director</td>
</tr>
<tr>
<td></td>
<td>Form # 2 Planning Budget Form due</td>
<td>Program director</td>
</tr>
<tr>
<td></td>
<td>Form # 3 Marketing and Terra Dotta Brochure Information due</td>
<td>Program director</td>
</tr>
<tr>
<td></td>
<td>Program proposal is reviewed. Approval, request for revisions, or denial will be provided to program director(s) within six weeks of receipt of Forms 1, 2, 3 with all required documentation.</td>
<td>Study abroad</td>
</tr>
<tr>
<td></td>
<td>Application deadline set</td>
<td>Program director, study abroad</td>
</tr>
<tr>
<td></td>
<td>Deposit, payment, and refund schedule set</td>
<td>Program director study abroad</td>
</tr>
<tr>
<td><strong>10-12 months before program begin date</strong></td>
<td>After program has been approved, program directors and study abroad staff members begin marketing program.</td>
<td>Program director, study abroad</td>
</tr>
<tr>
<td></td>
<td>A customized brochure created in globalminers.mst.edu</td>
<td>Study abroad</td>
</tr>
<tr>
<td></td>
<td>Marketing materials created</td>
<td>Program director</td>
</tr>
</tbody>
</table>
| | Market program to students including  
  - Notice to Student eConnection  
  - Notice to Staff / Faculty eConnection  
  - Study abroad fair  
  - Poster & Flyers  
  - Classroom presentations  
  - Information sessions | Program director |
<p>| | Form # 4 Safety, Risk Management and Insurance due | Program director |
| | Submit request for professional services contract for third party providers and other service providers that require a signed contract. | Program director |
| | Student may begin the application process | Students |
| <strong>6-10 months before program begin date</strong> | Program is marketed and students are recruited. | Program director, study abroad |
| | Finalize logistics for program | Program director |
| <strong>4-6 months before program begin date</strong> | Remind all students who have expressed interest in the program of the last date to submit completed applications | Program director, study abroad |</p>
<table>
<thead>
<tr>
<th>Event/Task</th>
<th>Action/Description</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application deadline</td>
<td>Review submitted applications for completeness and notify program director when applications are ready for review</td>
<td>Study abroad</td>
</tr>
<tr>
<td>Review applications and accept students</td>
<td>Program director</td>
<td></td>
</tr>
<tr>
<td>Accepted participants pay non-refundable 25% deposit of program fee</td>
<td>Students, study abroad</td>
<td></td>
</tr>
</tbody>
</table>

### 3-6 months before program begin date

<table>
<thead>
<tr>
<th>Task/Event</th>
<th>Description</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form # 5 Final Itinerary, Travel and Lodging due</td>
<td>Program director</td>
<td></td>
</tr>
<tr>
<td>Verify all contracts and agreements submitted to Business Services have been finalized and signed, provide a copy of all contracts and agreements and completed W8 forms to study abroad in order for payment process to begin</td>
<td>Program director</td>
<td></td>
</tr>
<tr>
<td>Students pay 50% payment</td>
<td>Students, study abroad</td>
<td></td>
</tr>
<tr>
<td>Students pay final 25% payment</td>
<td>Students, study abroad</td>
<td></td>
</tr>
<tr>
<td>Deposits or payments made to service providers / contractors</td>
<td>Study abroad</td>
<td></td>
</tr>
</tbody>
</table>

### 1-3 months before program begin date

<table>
<thead>
<tr>
<th>Task/Event</th>
<th>Description</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students are enrolled in the course(s) and tuition /fees are applied to student account</td>
<td>Study abroad</td>
<td></td>
</tr>
<tr>
<td>If “Group travel”- Book airfare with agency</td>
<td>Program director</td>
<td></td>
</tr>
<tr>
<td>If “Individual travel”- remind &amp; verify students upload a copy of their itinerary in their globalminers application, program directors upload itinerary in their travel registry.</td>
<td>Study abroad</td>
<td></td>
</tr>
<tr>
<td>Pre-departure orientation</td>
<td>Program director, study abroad</td>
<td></td>
</tr>
<tr>
<td>Finalize preparations for program</td>
<td>Program director</td>
<td></td>
</tr>
<tr>
<td>Non-enrolled participant form(s) due</td>
<td>Program director</td>
<td></td>
</tr>
<tr>
<td>Provide final invoices and W-8 forms for each vendor (if required) to International Affairs for payment processing</td>
<td>Program director</td>
<td></td>
</tr>
<tr>
<td>Confirm payment due dates and that payments are on schedule</td>
<td>Program director</td>
<td></td>
</tr>
<tr>
<td>Process invoices for payment</td>
<td>Study abroad</td>
<td></td>
</tr>
</tbody>
</table>

### 2 weeks before program begin date

<table>
<thead>
<tr>
<th>Task/Event</th>
<th>Description</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printed copy of Field Guided for Program Directors, receipt bag, and receipt log provided to program director</td>
<td>Study abroad</td>
<td></td>
</tr>
<tr>
<td>Print a Copy of the Allergies/Medical Self Report from Terra Dotta to include with above packet</td>
<td>Study abroad</td>
<td></td>
</tr>
</tbody>
</table>

### Day of return

<table>
<thead>
<tr>
<th>Task/Event</th>
<th>Description</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program survey sent to participants</td>
<td>Study abroad</td>
<td></td>
</tr>
</tbody>
</table>

### 2 weeks after return

<table>
<thead>
<tr>
<th>Task/Event</th>
<th>Description</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payments made for any outstanding expenses</td>
<td>Study abroad</td>
<td></td>
</tr>
<tr>
<td>Travel reimbursement submitted</td>
<td>Program director</td>
<td></td>
</tr>
<tr>
<td>Form # 6 End of Trip Debriefing due</td>
<td>Program director</td>
<td></td>
</tr>
</tbody>
</table>

### 4-6 weeks after return

<table>
<thead>
<tr>
<th>Task/Event</th>
<th>Description</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form # 7 Final Budget and Expenditures completed</td>
<td>Study abroad</td>
<td></td>
</tr>
<tr>
<td>Form # 8 Survey Results completed</td>
<td>Study abroad</td>
<td></td>
</tr>
<tr>
<td>Meeting to review program</td>
<td>Program director, study abroad</td>
<td></td>
</tr>
</tbody>
</table>
APPENDIX B
PARTICIPANT DEADLINES

Name of program:  Click here to enter text.
Start date of program:  Click here to enter a date.  End date of program:  Click here to enter a date.

Questionnaires:

Pre-Decision- Due by  Click here to enter a date.
- Allergies and Other Conditions- Read and answer accordingly
- Emergency Contact- Provide Emergency contact, names, address, phone and email address
- Guideline on Study Abroad in Sites Under Department Travel Warnings- Read and mark as read
- Passport- upload a copy of your passport information page
- Unofficial Transcript- upload a your transcript, if not a student please add a note stating you are not a student
- Other requirements - list requirement and due date:  Click here to enter text.

Post-Decision- Due by  Click here to enter a date.
- US State Department STEP Program- Enroll and mark date of enrollment

Materials:

Pre-Decision- Due by  Click here to enter a date.
- Health Clearance for Student Planning to Study Abroad- Complete through Student Health Services or personal physician
- Assumption of Risk and Release Form- Read and mark as signed
- Audio/Visual Release Form- Read and mark as signed

Pre-Decision- Due after you have been accepted and Status has changed to “Admitted”- Due by  Click here to enter a date.
- Application Fee and Payment- This will be a 25% Deposit of the Program Fee

Learning Content:

Pre-Decision- Due by  Click here to enter a date.
- Center for Disease Control and Prevention- Read, view links, read and mark as read

Post-Decision- Due by  Click here to enter a date.
- Alcohol Consumption
- FBI Safety Abroad Information
- Health & Safety Abroad
- Manage Your Money While Abroad
- U.S. Department OSAC Travel Form

Recommendation: Due by  Click here to enter a date.
- Request a recommendation from an S&T Faculty Member- You will send an electronic request through the system. The recommending Faculty member will complete a questionnaire which will ask some general questions about you and in the end ask them to provide a recommendation

Note: As we progress, the program directors and or Risk Management through the UM System, may require additional documents be added to the application. Participants will be notified when items are added and the date they should be completed.
http://globalminers.mst.edu/

User id and password are the same as you use to sign into the campus network.

To get to the Administrative: Home from anywhere – click on the little house, top left corner – and select Administrative. Shared queries and reports are available from the Administrative page.

To search for applicants or view applications- click on Applicants.

To view a list of applicants using search:

To go Applicants > Search

Enter a search field (i.e. name of program, location, or leave blank) > Search
A list of students who have started an application is provided.

To view a list of applicants using a shared query or a shared report:

Go to the Administrative: Home page (click on house at top left) > Select Administrative

Click on Shared Queries – it will show a list of shared queries.
To run a query – click on the name of the query.
To export the query as an Excel file or text file, click on the paper or X symbols to the right.
To create a new report, click on the bar symbol to the right.

To see what items have been completed by one or more applicants:
Administrative Home > Select the shared query for your program > this will bring up a list of applicants.

Click on the down arrow for Progress Audit and select Pre Decision
Click Check Everything (top right) then Next (bottom of page)
You'll be shown a list of all items an applicant must complete in the Pre-Decision phase and whether an applicant has completed any of the items.

To view an application:
Applicants > Search > Enter program or applicant name > Search
Click on the name of the program next to the applicant’s name.

Program directors are encouraged to look at all information submitted by the student in the application. This may be easily done by clicking on the Overview tab, then selection Print Application. The application may be viewed or printed. Program directors may also click on each tab to view information. Links in blue may be selected to drill down to more information. A questionnaire called Allergies & Other Conditions gives students the opportunity to self-identify any allergies, dietary requirements, or other conditions.

When a student has been accepted into the program, please change the status of an application from Pending to Accepted. To change the status go to Status Tab and select Accepted from the drop down list next to Status. Click Update at the bottom of the page.
APPENDIX D
APPLICATION REVIEW PROCESS

Step 1. Study Abroad Coordinator will review participant applications to assure all required items are received.

- If students are missing items an email will be sent as a reminder or to check the status.
- If an application is found to be missing multiple critical items and the deadline has passed, the coordinator will send an email to student to ask of the intention to either withdraw or provide a response indicating why the delay in completion?

Step 2. When the application is complete (or when deemed ready for review based on correspondence from applicant) the Study Abroad Coordinator will mark the application, “Under Program Director Review”

- Notes may be added under the “comment tab”. This space will use this area to provide updates received from students. As an example, the application is marked for Program Director review, but the health clearance is missing. In this case the student might have informed the study abroad office the date of their health clearance and that it will be uploaded by a given date. NOTE – Comments can be viewed by student.

Step 3. Program Directors will review the content of the applications. If Program Director approves of the participant, they will mark the status of the application “Conditionally Accepted”

- Note – Program directors may wish to pay particular attention to any health, medicine, or allergy information which is self-reported by the student. This information can be found on the Questionnaires tab in the Allergies or Other Conditions questionnaire.

Step 4. Once marked “Conditionally Accepted”, the participant will be notified by the Study Abroad Coordinator and ask to make the 25% deposit to the Office of International Affairs by the scheduled deadline. Participants will also be reminded of the schedule of the remaining payments.

Step 5. Once the student makes the initial 25% deposit their status will be changed to “Accepted”. At this time the deposit is non-refundable.

Step 6. The participant will go into their application and change themselves to “Committed”. Once they have done this the application will open to new items which will need to be completed by the deadline set by the Program Directors.