

ROUTING YOUR DEPARTMENTAL STUDY ABROAD PROGRAM RATE REQUEST FORM

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

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

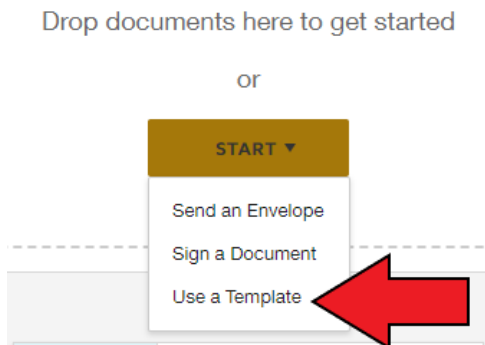
At this time we recommend you fill out the rate request form in its Excel format and only upload it when it is ready for routing for signatures. Please note: rate request forms for multiple programs should NOT be submitted all together in one file – they should each be contained in their own file and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

convention: RR-COLLEGE-PROGRAM LEADER LAST NAME-TERM-COUNTRY

- 1) Log in to DocuSign <https://one.purdue.edu/task/all/docusign>
- 2) After logging in, click on the “START” button in the middle of the landing page.



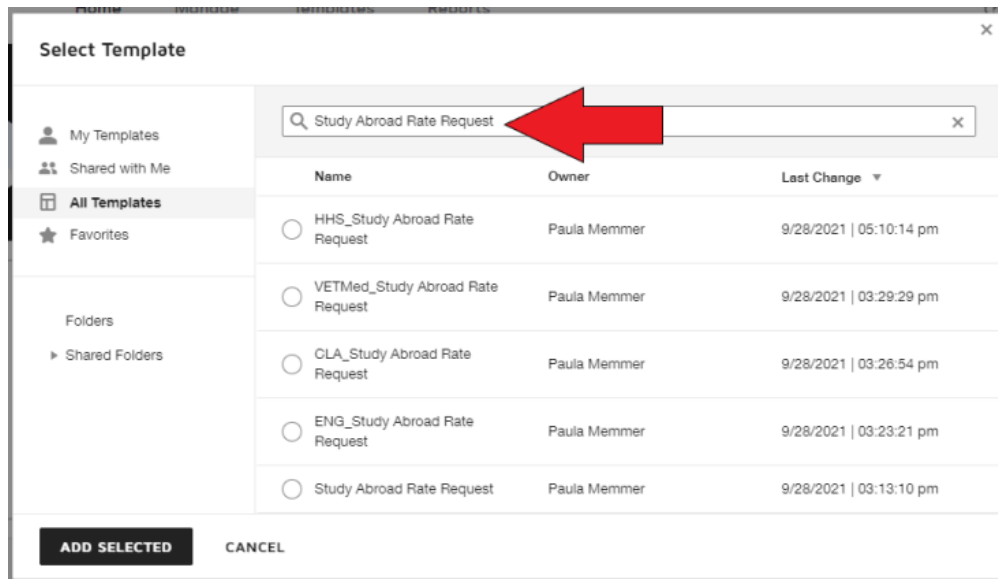
- 3) Click on the “Use a Template” option in the drop-down menu.



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



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



Select Template

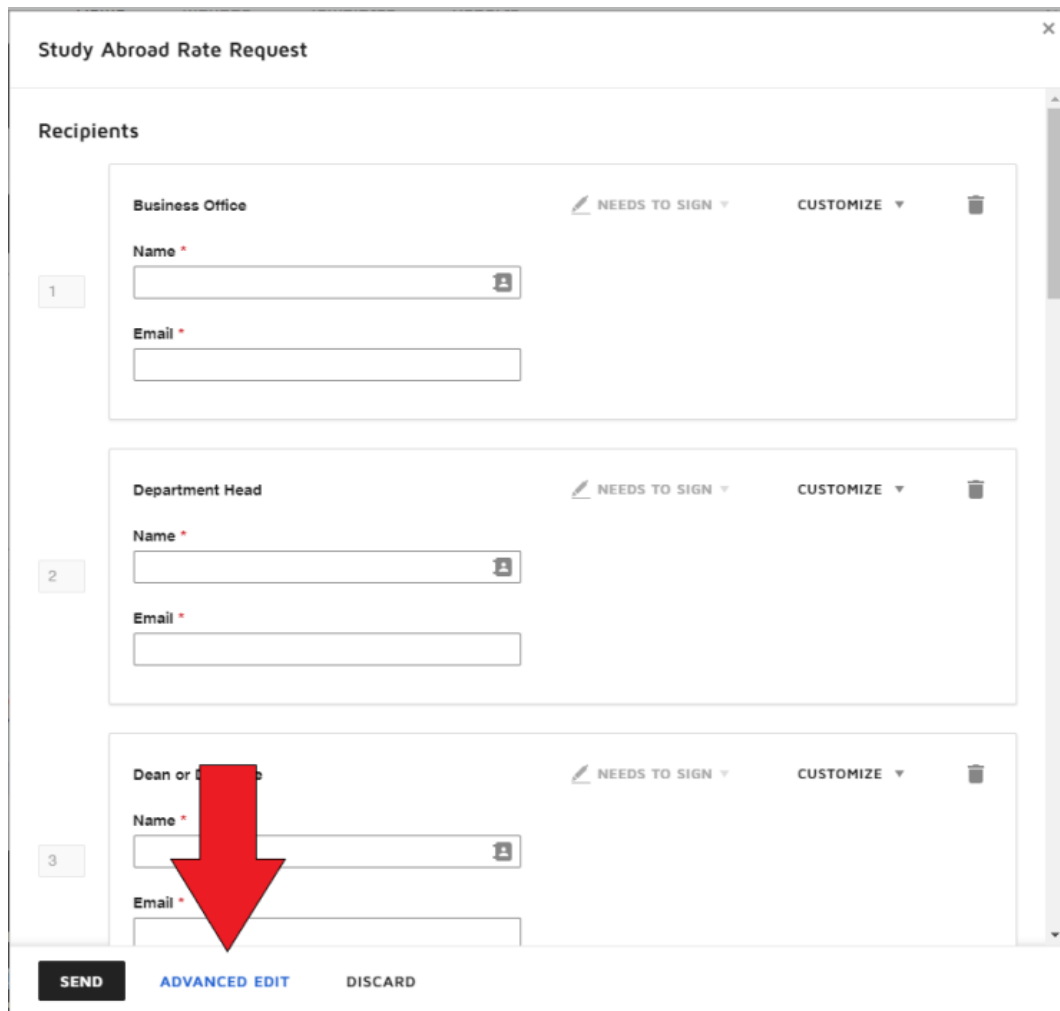
My Templates
Shared with Me
All Templates
Favorites

Search: Study Abroad Rate Request

Name	Owner	Last Change
<input type="radio"/> HHS_Study Abroad Rate Request	Paula Memmer	9/28/2021 05:10:14 pm
<input type="radio"/> VETMed_Study Abroad Rate Request	Paula Memmer	9/28/2021 03:29:29 pm
<input type="radio"/> CLA_Study Abroad Rate Request	Paula Memmer	9/28/2021 03:26:54 pm
<input type="radio"/> ENG_Study Abroad Rate Request	Paula Memmer	9/28/2021 03:23:21 pm
<input type="radio"/> Study Abroad Rate Request	Paula Memmer	9/28/2021 03:13:10 pm

ADD SELECTED CANCEL

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



Study Abroad Rate Request

Recipients

1

Business Office NEEDS TO SIGN CUSTOMIZE

Name *

Email *

2

Department Head NEEDS TO SIGN CUSTOMIZE

Name *

Email *

3

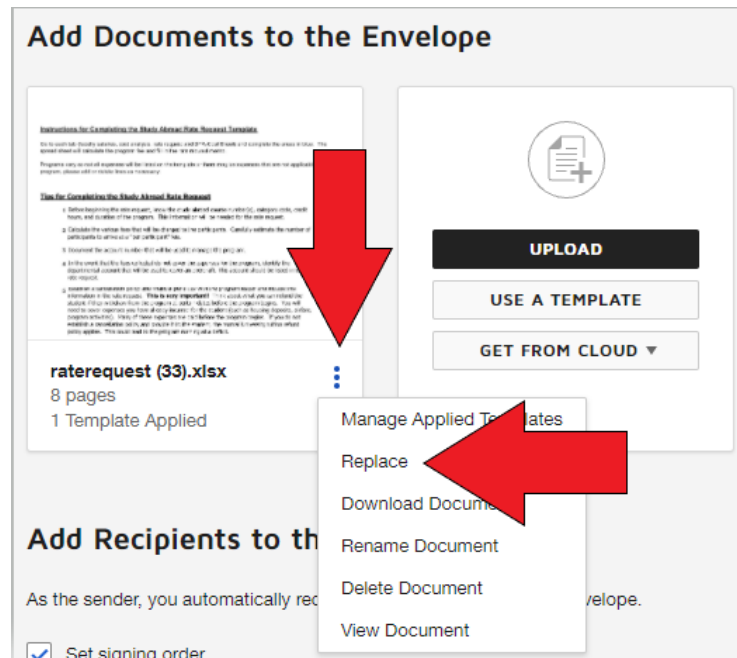
Dean or Assistant Dean NEEDS TO SIGN CUSTOMIZE

Name *

Email *

SEND **ADVANCED EDIT** DISCARD

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



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

1	Business Office	NEEDS TO SIGN	CUSTOMIZE
	Name *		
	Email *		
2	Study Abroad Program Manager	NEEDS TO SIGN	CUSTOMIZE
	Name *	Paula Memmer	
	Email *	pmmmer1@curious.edu	
3	Department Head	NEEDS TO SIGN	CUSTOMIZE
	Name *		
	Email *		
4	Dean or Designee	NEEDS TO SIGN	CUSTOMIZE
	Name *		
	Email *		

5

Director of Study Abroad

NEEDS TO SIGN

CUSTOMIZE

Name *

Brian Harley

Email *

bharley@purdue.edu

6

Asst. Director of Financial Affairs

NEEDS TO SIGN

CUSTOMIZE

Name *

Erica Cox

Email *

ericecox@purdue.edu

7

Senior Director of Finance

NEEDS TO SIGN

CUSTOMIZE

Name *

Kristi L. Mickle

Email *

kmickle@purdue.edu

8

Bursar operations

CC RECEIVES A COPY

CUSTOMIZE

Name *

Cheryl Fries

Email *

cfries@purdue.edu

9

Interim Bursar

CC RECEIVES A COPY

CUSTOMIZE

Name *

Michelle Fulk

Email *

mfulk@purdue.edu

10

Senior Administrator, Comptroller

CC RECEIVES A COPY

CUSTOMIZE

Name *

Shannon L. Williams

Email *

sllawill@purdue.edu

ADD RECIPIENT

NOTE: The “ADD RECIPIENT” button is at the very bottom of the already populated signing list. You can add additional signers or CC recipients there and then drag them to the appropriate place in the signature flow.

11) After you’ve correctly entered the signing order, click on the gold “NEXT” button in the upper right hand corner.

?

ACTIONS

ADVANCED OPTIONS

NEXT

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

PURDUE UNIVERSITY Inter Office Memorandum
(Department) Business Office

To: Kristi Mickle, Senior Director of Finance, Executive Office

From: Business Manager

Date: 9/24/2021

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

Department: Department Name

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

Course Offerings

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

Item	Proposed Rate
Study Abroad Fee	0.00
Program Fee	#DIV/0!
Insurance	0.00
TOTAL	#DIV/0!

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

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

Explanation
Summary of the purpose of the program and the benefit to the students.

Cancellation Policy (link)
Attach a copy of the Cancellation Policy to this rate request outlining deposit/financial obligations for participation in the program.

Otherwise, please make note here that a cancellation policy is not in place for this program and the department understands they will be unable to collect funds from students if they withdraw.

Security Risk and Assessment Committee (SRAC) Approval
Is this program traveling to any country with a heightened Travel Advisory? YES or NO
What is considered heightened -
Any location that is Level 2 - Exercise Increased Caution-Contains Areas with Higher Security Risk (Level 2 with more - "Increase caution only" does not warrant the need for additional approval.)

If yes, please submit a copy of the approval email form the SRAC committee with this rate request.

Approval Recommended:

Department Head
Title
Date
Brian Harley
Director, Study Abroad

Dean of College/School
Title
Date

Approved:
Kristi Mickle
Senior Director of Finance, Executive Office

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

ⓘ ACTIONS ▼

RECIPIENT PREVIEW

SEND

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