International Academic Programs
UNIVERSITY OF WISCONSIN–MADISON

MANUAL 2:
Pre-departure Preparation

PROGRAM LEADERS AND ON-SITE PERSONNEL

SUMMER 2019 & 2019-20

REVISED FEBRUARY 2019

Dear Colleagues,

Thank you for choosing to commit your time, energy, and expertise to providing a study abroad experience for UW-Madison students. We appreciate your initiative, careful planning, and leadership and we aim to support you in your work. Faculty-led study abroad and domestic study away programs give students the opportunity to learn both in and outside the classroom and to work closely with faculty in a new context. Students typically find that their experiences abroad are some of the most fulfilling of their undergraduate career. Similarly, faculty report that teaching abroad allows them a different kind of teaching experience and one that they have found particularly rewarding.

This handbook is intended to provide Program Leaders with information concerning your roles and responsibilities while on the program as well as related processes and policies. The Program Leader's role is critical. Your responsibilities range from designing academic content, to assisting with logistics, to managing risks. Planning a study abroad program will require you to go beyond your usual on-campus duties to become a travel agent, bookkeeper, and a 24-hour contact. Leading a study abroad program means that you will spend much more time with your students, both in and out of class, and will likely serve as a close adviser and mentor.

Faculty who lead programs abroad and the UW-Madison offices supporting them must be ready to work together to respond in an effective and timely manner in the event of a crisis. For this purpose, and as a useful reference tool, all Program Leaders (including those who have previously led programs) should read all manuals carefully, keep a copy on hand, and attend a training that is offered each semester by International Academic Programs.

Thank you again for your time and commitment in providing this valuable experience to UW-Madison students. Remember that Study Abroad staff are always available to provide support to Program Leaders at any point before, during, or after the program.

Safe Travels,

Dan Gold
Director, International Academic Programs

There are a total of three (3) manuals for Program Leaders. This manual, Part 2, details the pre-departure program preparation process and overall responsibilities of Program Leaders. Part 1 relates to program development and Part 3 provides details pertaining to on-site logistics and program management including emergency procedures.

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I. STUDY ABROAD STAFF CONTACT INFORMATION

International Academic Program's (IAP) Main Office and Study Abroad Resource Center
301 Red Gym
716 Langdon Street
Madison, WI 53706
p: 608-265-6329
f: 608-262-6998
peeradvisor@studyabroad.wisc.edu

Office Hours/Peer Advisor Walk-in Hours
Monday - Friday
8:00 a.m.- 4:30 p.m.
Click Here to Meet Our Team >>

IAP has a 24/7 emergency phone that rotates weekly among study abroad staff to assist students, staff, and faculty abroad. This number is provided to Program Leaders (PLs) and students in their MyStudyAbroad online portal (MySA) and is listed on the program's emergency card.

IAP Emergency Phone Number: 608-516-9440

IAP also works in close partnership with the College of Agricultural and Life Sciences, the College of Engineering, and the Wisconsin School of Business to administer programs geared specifically for their academic disciplines.

CALS International Programs Resource Center
116 Agriculture Hall
1450 Linden Drive
p: 608-265-3835
studyabroad@cals.wisc.edu

Click Here for CALS Office Hours/Peer Advisor Walk-in Hours >>

International Engineering Studies and Programs Resource Center
1150 Engineering Hall
1415 Engineering Drive
p: 608-263-2191
international@engr.wisc.edu

Wisconsin School of Business International Programs Resource Center
3290 Grainger Hall
975 University Avenue
p: 608-265-5017
international@wsb.wisc.edu
Hours/Peer Advisor Walk-in Hours:
Monday - Thursday 10:00 am - 4:00 pm
Friday 10:00 am - 3:00 pm

Click Here to Meet Our Team >>

II. PREPARING FOR YOUR STUDY ABROAD PROGRAMS PRIOR TO DEPARTURE

Study Abroad Staff are committed to working closely with Program Leaders (PLs) to ensure all programs operate at the highest standards and team members are always available to assist PLs with the program. The following procedural guidelines are intended to aid PLs in the execution of their responsibilities.

Information related to benefits and administrative matters such as Appointment Letters can be found in Part 1 of the PL Manual. Information related to on-site guidelines and emergency response can be found in PL Manual Part 3.

1. **MyStudyAbroad (MySA) Portal**

   The MySA portal provides on-line access to information specific to PL duties. PLs may access MySA using their UW NetID & Password (non UW-Madison PLs will be assigned a login ID and password).

   MySA includes the following information:
   - Participant information including: application, flight itineraries, and contact information;
   - IAP documents & program-specific information such as this manual, budgets, contracts, and financial forms;
   - Student health and wellness information;
   - International health insurance details;
   - Emergency response documents and incident reporting tool;
   - Syllabus loading and grade submitting tool;
   - Names and contact information for the Program Team members associated with the program.

   Students will also have a MySA account, but it is different from what the PL can view. For a version of the student view of MySA, see Appendix A.

2. **Passport, Visa, and Entry Clearance**

   PLs traveling abroad must have a current passport valid for at least six months past the end date of their program. PLs are responsible for obtaining their own passport.

   A visa is a written permission to visit a country granted by the government of that country. It typically comes in the form of a sticker or stamp placed in the passport. The program's Study Abroad Advisor (SAA) will provide the PL with general information regarding visa and/or entry clearance for their host country. PLs are responsible for applying for and receiving the appropriate visa and/or entry clearance from the host country's Consulate or Embassy.

   The visa process can be lengthy and time consuming, so it is important to apply as soon as all the relevant paperwork is gathered. Some Consulates require individuals to appear in person, others require federal criminal background checks, and others have certain medical requirements to meet prior to the visa being issued. All visa applications require a valid passport when applying, therefore IAP strongly recommends against traveling abroad the semester prior to leading a program and/or obtaining a second passport so as not to jeopardize the visa process. The granting of a visa is completely at the discretion of the Consulate or Embassy, as a branch of the government they are representing. They are free to deny a visa application without any explanation whatsoever (The U.S. government reserves this same right with any foreign nationals requesting a U.S. visa).

3. **Flights**

    Per UW-System policy, PLs must purchase flights through Fox World Travel. Please consult with your IAP Financial Specialist <u>before</u> purchasing a flight.

    Most programs do not have a group flight; instead, IAP provides students with information on when to arrive/depart so that they may purchase their own flight. For those programs that do have group flights, the IAP Financial Specialist will make the arrangements with Fox World Travel on behalf of the program.

4. **Family or Visitors of PL On-site**

    On short-term programs, IAP does not encourage Program Leader (PL) friends or family to accompany the PL abroad. For semester and year programs, PLs should carefully consider the difficulty of balancing the responsibilities required of PLs leading programs abroad with family responsibilities. Keep in mind:

    - IAP takes no responsibility (logistical, financial, or legal) for family or friends of PLs during a study abroad program.
    - PL friends or family are not allowed to participate in any program activities. This includes such activities as:
        - Official arrival pick-up or return to airport for program;
        - Program excursions;
        - Any reception or meals paid for by the Program.
    - PL visitors or family members should be aware that their personal behavior must not in any way affect the quality of the program or the experience of the participants. For example, PL's family members should not text or call students.
    - Minor children must be under the supervision of a parent/guardian other than the PL.
    - At no time should a program participant be asked to care for or supervise a child of a PL.

5. **Registering at the U.S. Embassy / Consulate**

    IAP advises all student participants and PLs who are U.S. citizens to register online with the U.S. Department of State Smart Traveler Enrollment Program (STEP) prior to departure. The U.S. Government provides this free service to U.S. citizens/nationals who are traveling to, or living in, a foreign country. STEP allows individuals to enter information about their upcoming time abroad so that the U.S. Department of State can better assist in an emergency, and it also allows Americans residing abroad to get routine information from the nearest U.S. embassy or consulate.

    Individuals who are not U.S. citizens should register at their home country's nearest consulate or embassy. They should also subscribe to the U.S. Department of State updates, emergency messages, and information on other breaking events. They can register for these alerts here. Non-US citizens are also encouraged to check with their home country's embassy for comparable citizen services.

6. **Emergency Contacts**

    Ensure that your emergency contacts are up to date in MyUW. If you experience an emergency during your appointment that would require IAP to contact someone on your behalf, IAP will use your listed emergency contacts.

    For Non-UW-Madison employees: Please provide your SAA with the name, phone(s), and email address for your emergency contact(s).

7. **Insurance**

   PLs who are employees of UW-Madison and currently receive university benefits will remain on their own health insurance for the duration of the position. Please refer to your insurance plan for services or benefits that will be available to you while outside the U.S. PLs who are not UW-Madison employees should check to be sure their health insurance will remain active and what benefits are available to you while abroad.

   IAP will enroll PLs in international health insurance/study away insurance coverage for the duration of the program. These are the same insurance plans with Cultural Insurance Services International (CISI) that student participants are enrolled in. Details on these insurance plans can be found online.

   Once enrolled, CISI will email instructions for accessing their insurance portal and printing your personalized ID Card. Information and a link to the CISI portal is also provided in the MySA account, for PLs and students. Be sure to print your CISI card and keep it with you during your program.

   CISI Portal Tools & Resources:

   - View/print/email your ID card, coverage brochure, consulate letter and claim form;
   - Purchase an extra month of insurance for a period of personal travel;
   - View/update your online account profile information;
   - Obtain contact information for emergencies and benefit/claim questions;
   - Search for hospitals and clinics overseas;
   - Contact information for English-speaking doctors overseas;
   - Short-term travel alerts and travel warnings issued by the U.S. Department of State;
   - Country-specific information and profiles for every country in the world;
   - Links to overseas U.S. Embassy web sites;
   - Health and vaccination recommendations compiled by the Center for Disease Control (CDC);
   - Enroll dependents in CISI insurance at your own expense. More information on dependent coverage can be found here.

   IAP requests information on English-speaking doctors/clinics for all faculty-led and UW Study Center locations. This information will be uploaded to your MySA account for your reference. If you receive local recommendations for health care, keep in mind that the direct pay option from CISI may not be available.

8. **Income Tax**

   IAP urges you to consult a tax accountant or tax specialist prior to your departure to determine if there are any tax implications related to your PL appointment. Further information may also be found in the IRS Publication 54: Tax Guide for U.S. Citizens and Resident Aliens Abroad.

   PLs who are UW-Madison employees may direct further questions to the UW-Madison's Benefit Services.

   PLs who are non-UW-Madison employees should contact your own campus Compensation and Benefits Office. Items to consider in this discussion are foreign earned income and non-reimbursed business-related expenses.

9. **Student Privacy Rights (FERPA) and Conduct with Students**

   PLs are expected to abide by FERPA rules and regulations while abroad, just as they would

here on campus. Please take some time to re-acquaint yourself with FERPA given the role you will have as a PL. Just as students must follow the UW-Madison code of conduct, the PL and program staff must abide by these same conduct rules as well as IAP policies & guidelines while on the program. Some examples of unacceptable PL conduct include:

- Working under the influence of alcohol or illegal drugs, or using alcohol or illegal drugs on the job;
- Stealing State property or funds, or knowingly misusing State property or funds;
- Jeopardizing the safety of persons or property;
- Inappropriate relations with students. As PLs spend a substantial amount of time with students both in and out of the classroom, PLs and program staff should be careful to avoid any behavior which could be misinterpreted as inappropriate.

A note about alcohol: even though social norms and laws regarding alcohol consumption vary from country to country, alcohol is **not** permitted at any program-sponsored activity/event for students. IAP prohibits PLs and other program staff from consuming alcohol at any time with students present.

III. PROGRAM LEADER ROLE IN PROGRAM LOGISTICS & STUDENT SERVICES

1. **Marketing & Recruitment**

   PLs involvement in promoting programs is crucial for reaching minimum enrollment numbers. Because of your relationship with your department colleagues and your knowledge of your department structure, we expect you to take the lead in spreading the word about your program within your department.

   PLs are expected to promote programs in the following ways:
   - Provide study abroad staff with your photos from the program or the location and suggested text for the website and flyers;
   - Attend the fall Study Abroad Fair;
   - Utilize program specific resources within the PL marketing toolkit, accessible online.
   - Distribute program flyers to your department in the following ways: hang the program flyer on your office door, department bulletin boards, in your classrooms, & give to colleagues to display;
   - Go into appropriate classes and talk about your program. Ask colleagues, including TAs to give program information in their classes or welcome Student Marketing Coordinators to present, if you cannot go in person;
   - Host information sessions with department groups, talk with relevant student organizations or dormitories that might be interested in the program; if organizing an info session, please notify IAP at least 2-weeks prior to event to benefit from cross promotion by IAP.
   - Send out information on the program in department newsletters and social media accounts;
   - Have a link from your department website to the program website;
   - Use past participants to help recruit students and get the word out!
   - For additional resources and ideas for how to promote your program, visit Promoting Your Program.

   We will make every effort to get the word out about your program across other campus channels. Study Abroad staff will do the following to assist with promotion of the program:
   - Create and maintain the program web site at studyabroad.wisc.edu;
   - Create and maintain program specific resources, accessible in your PL marketing toolkit.
   - Obtain photos to use for marketing purposes;
   - Distribute a program flyer to various on and off-campus locations which could include: residence halls, academic buildings, student unions, State Street, etc.;

- Provide table space for your program at the annual Study Abroad Fair in September, if the program has been approved prior to the Fair;
- Hold Open Houses on campus where prospective students could learn about your program. These Open Houses are not program-specific; rather they are based on country/region, language, duration, etc.;
- Email all students who attend the Open Houses and Study Abroad Fair, as well as students who start applications for your program, reminding them of application deadlines;
- Maintain a list of returned students who are willing to answer questions for prospective students and create a Returned Student Profile, which can be found on the program website;
- Put announcements on IAP's social media accounts and place ads when needed;
- Have staff available to do classroom presentations discussing the program.
- Assist with promoting program information sessions that you coordinate (please allow at least 2-weeks advance notice to maximize IAP promotional efforts).

2. Program Logistics

We offer a full range of professional support services related to the delivery of study abroad opportunities. Study Abroad Staff will work closely with PLs on the various administrative tasks associated with running a program. Please consult with your program team for support on any of the following:

- SAA will develop a program-specific handbook in conjunction with PL;
- PL will lead a pre-departure orientation for student group (see Appendix C for a sample agenda);
- IAP will oversee the development of program contracts and will consult with PL to finalize program details;
- PL will create an itinerary, or have one provided by program partner or travel agency, for the program to include activities for each day, detailed accommodation information (including addresses and phone numbers), and transportation details, if applicable. Itineraries should be provided to the SAA 1-month prior to departure.

3. Participant Selection

Each program has specific eligibility requirements for student applicants that are stated on the program website. We provide an online application that all students will complete. Applicant academic information, including GPA, academic standing, completed course work, is collected through this on-line application. Students also submit responses to three standard questions:

- Describe the goals (academic, professional, personal), which you hope to accomplish through the study abroad experience. How will this particular Program and location help you meet these goals?
- What do you expect to be the most challenging aspects of studying in the country you have selected and how do you plan to address them?
- Is there any other additional information that would helpful to know about your application to the program? (Optional)

PLs can request additional application questions, if needed, to better understand the applicants.

Once the application deadline passes, Study Abroad Staff will review all applicants. Final evaluation and selection of applicants must be based on the specific and advertised eligibility requirements that are outlined for the program. Study Abroad Staff will make all acceptance notifications. If your program has more qualified applicants than is able to accept, we will create a waitlist.

Students will be notified by email of their application status from the Study Abroad Staff. Accepted students will be advised to log into the MySA portal to begin reading program-specific materials and completing appropriate next steps related to their program participation. Students typically have two weeks to confirm their program participation and hold their place with a $300 non-refundable deposit.

MySA is the location where all program materials and details will be provided to students. Speak with your SAA if you have information and/or documents that you would like to have provided to

participants. A full list of student acceptance materials can be found in Appendix D.

4. **Participant Cancellation**

Students sometimes choose or need to cancel their participation on a program (health issues, family concerns, etc.) after acceptance and before the program begins. In all cases, students will be required to submit a written statement of cancellation to their study abroad advisor or advising office. If you learn that a student has decided or is thinking about cancelling their participation, contact your SAA and inform the student to let Study Abroad Staff know of the cancellation immediately. Cancellations typically have financial implications so it is important to respond quickly.

5. **Participant Health & Wellness Self-Disclosure**

Students self-disclose any health/wellness items on the health & wellness form, and the SAA will follow-up with the student as appropriate. All students who indicate they take any medications, have a medical condition (mental or physical), or use McBurney Services will receive an email follow-up from the SAA that tells the student steps to take with their personal doctor or McBurney to make sure the appropriate conversations are happening. Should a student need any classroom or other accommodations for the study abroad program, the student may contact you directly. You can view student health & wellness forms in your MySA portal in the Health/Wellness section. These documents are to be kept protected and confidential.

6. **Pre-Departure Orientation**

All participants are expected to complete an online general orientation covering cross-cultural learning, academic matters, health & safety, and financial issues. All students are also expected to complete a Health and Safety pre-departure orientation. You are encouraged to review these materials as well so that you better understand our general procedures and policies.

PLs are required to facilitate a program specific pre-departure orientation meeting. Having a few past participants present on a panel can be helpful. You may work with your SAA if you need assistance reaching out to past participants for an orientation session. See Appendix C for a Sample Agenda for a Pre-Departure Orientation.

Past PLs have mentioned that these meetings provide an excellent opportunity to clarify the program's learning objectives, establish clear expectations related to the program, and review site-specific safety issues. They also advise to establish a good rapport with students early on. Engage students in conversation about their experiences and take an interest in their lives in and out of the classroom. If you seem interested and open, students will feel more comfortable talking with you about their questions and concerns and thus you'll be the first instead of the last to know when a problem is emerging.

7. **Promoting Health & Safety for Students**

The safety and security of our faculty, staff and students abroad is of utmost importance. We have emergency policies and procedures that we continuously review and update. Study Abroad Staff work proactively to provide students with access to information about safety in each program location. From UW-Madison, IAP monitors the world situation daily through various resources and conveys information to students, staff, and faculty as appropriate.

Prior to departure, the PL can assist with promoting health and safety with participants by:
- Being familiar with safety information provided on the IAP website, PL Manuals & Student Handbooks;
- Set clear expectations for the program during pre-departure and on-site orientation and model these expectations throughout the program. This includes sharing an emergency response plan with students on-site.

IV. ACADEMIC INFORMATION

This section covers some general academic policies and procedures that apply to all study abroad participants. While you established the academic content of the program in the program development stage, the items below outline information that you and your students can review to prepare for the on-site course(s). Students are provided with more detailed academic information in the *IAP Study Abroad Handbook*.

1. **Registration**

   Study Abroad Staff will register all program participants (study abroad and study away) at UW-Madison for the period of the program through a placeholder course. This allows the student to continue to be an enrolled student at UW-Madison while not being charged regular UW-Madison tuition (instead students are charged their IAP program fee). Students should not register themselves at UW-Madison for the program.

2. **Learn@UW (Canvas)**

   Learn@UW (Canvas platform) can be used similarly to other courses on campus to deliver content and communicate with your students. Since a study abroad program is not a regular timetable course, instructors must email learnuwsupport@doit.wisc.edu to get this set up.

   Your SAA can send you a list of NetIDs for the students on the program, which you will use to give your students access to the course.

3. **Syllabus**

   Be sure that you have developed a comprehensive syllabus for any courses you are teaching on the program. You may want to revisit the appendix item *Guidelines for Syllabi* in Manual 1 to ensure that all required information is included. Before the start of the program, you should upload the syllabus into the MySA portal.

4. **Course Equivalents**

   To get credit for the courses students take abroad, UW-Madison requires that each course a student takes abroad be assigned an 'equivalent' UW-Madison department, course title, and number. This 'equivalent' course title and number will be recorded on their UW-Madison transcript. A course is determined as an equivalent after approval from the relevant academic department at UW-Madison. Non UW-Madison degree-seeking students will receive a UW-Madison official transcript at the end of their study abroad program and must also receive UW-Madison course equivalents for all the courses they take on their program.

   For more detailed information about the course equivalent request process, see Appendix B.

5. **Credit Load & Class Expectations**

   Short term programs: These programs usually have a set credit load and students on these programs should refer to their program handbook. All program participants are expected to do the same amount of work and earn the same number of academic credits. Students are expected to participate fully in all required program classroom activities and excursions. Graduate students are normally expected to do additional work, as would be true for courses taught on campus.

   To limit students' travel during class time, it is important to establish an attendance policy. In other programs of this duration, PLs have allowed up to 2 medical-related absences. The attendance policy and the impact of classroom attendance on the course grade should be clearly described and given to the students in writing, preferably in the course syllabus.

Semester & Year Programs: Students must carry a minimum of 12 credits each semester and a maximum of 18 credits. However, several study abroad programs require students to take more than 12 credits a semester to be considered full time. Check the academic information in the program handbook for the exact credit load requirements. Exceptions to these limits require written permission *in advance* from your SAA. Students may earn a maximum total of 36 credits for the academic year. *Please be aware that if your site has a pre-semester course, these credits will count toward the 36-credit total for UW-Madison students.*

6. **Pass/Fail Guidelines**

The rules governing pass/fail eligibility are complex, so students should be advised to read the Study Abroad Handbook guidelines carefully. The IAP pass/fail guidelines for programs mirror campus policies and apply to all students participating in an IAP program. PLs serving as instructors are not informed which students have registered for pass/fail and will assign a regular letter grade to all students in the program.

7. **Academic Misconduct**

Academic honesty requires that the course work (drafts, reports, examinations, papers) a student presents to an instructor honestly and accurately indicate the student's own academic efforts. UWS 14 is the chapter of the University of Wisconsin System Administrative code that regulates academic misconduct. UW-Madison implements the rules defined in UWS 14 through our own "Student Academic Misconduct Campus Procedures."

UWS 14.03 states that academic misconduct is an act in which a student:
- Seeks to claim credit for the work or efforts of another without authorization or citation;
- Uses unauthorized materials or fabricated data in any academic exercise;
- Forges or falsifies academic documents or records;
- Intentionally impedes or damages the academic work of others;
- Engages in conduct aimed at making false representation of a student's academic performance; or
- Assists other students in any of these acts.

Examples of academic misconduct include, but are not limited to: cheating on an examination; collaborating with others in work to be presented, contrary to the stated rules of the course; submitting a paper or assignment as one's own work when a part or all of the paper or assignment is the work of another; submitting a paper or assignment that contains ideas or research of others without appropriately identifying the sources of those ideas; stealing examinations or course materials; submitting, if contrary to the rules of a course, work previously presented in another course; tampering with the laboratory experiment or computer program of another student; knowingly and intentionally assisting another student in any of the above, including assistance in an arrangement whereby any work, classroom performance, examination or other activity is submitted or performed by a person other than the student under whose name the work is submitted or performed.

Consult with your Program Team should you have any questions regarding what constitutes Academic Misconduct and/or how to address situations of misconduct on site.

Additional information on the process for submitting grades and other academic matters are in the Part 3 PL Manual.

V. FINANCES

1. **Program Fees & Student Financial Aid**

   Each program has a program cost sheet that includes program cost details, payment schedule information, and financial policies. The program cost sheets are located on the program website as well as within MySA. On the program cost sheet, the IAP program fee and the estimated additional expenses comprise the total cost of attendance for the program. Expenses not included in the IAP program fee are listed as estimated additional expenses on the program cost sheet and are based on information from past participants, on-site staff, and/or partner organizations and universities. These estimated expenses are to help students plan and prepare for the program.

   Upon acceptance, students pay an IAP Acceptance Deposit to confirm their participation on the program. The IAP Acceptance Deposit is credited to the total IAP program fee. IAP program fees are billed to student accounts through the Bursar's Office. Students with questions regarding the program fees or the billing process should contact their IAP Financial Specialist.

   UW-Madison student may be able to utilize financial aid on UW-Madison study abroad programs. Guidelines on the usage can be found on the Office of Student Financial Aid (OSFA) webpage.

2. **Program Expense Payments**

   Payments to the vendors (hotels, hostels, transportation and tour companies, museums, etc.) are a necessary part of the study abroad pre-departure preparation process. IAP will work to pay as many vendor invoices in advance of a program's start as possible. This decreases risk for the program leader by lowering the amount of money, in the form of a cash advance, that they are responsible for during the program.

   A combination of institutional policy, budget design, and best practice in education abroad, means that IAP cannot and does not make payments to any vendors or service providers prior to all students confirming their participation. By confirming their participation, students are making a financial commitment to cover their portion of the cost of operating the program. Once this happens, IAP can begin making payments on behalf of the program. It is important to note that this means no deposit payments can be made to hold reservations – *there is no money to spend for a program until after the students confirm.*

   IAP Payment Methods

   IAP Direct Payment
   Whenever possible, IAP will be invoiced and pay a vendor directly. PLs should be careful not to pay any expenses for the program for which IAP is paying directly, to prevent a duplicate payment. If a PL is informed on-site about a payment from IAP not being received, the PL should contact IAP before making a payment with cash advance or personal funds.

   PL Payment
   Some expenses for a program may need to be paid onsite by the PL (i.e. a group admission fee for a program excursion) and the budget will indicate these expenses. IAP can provide a cash advance to a PL prior to departure for the purpose of covering these expenses. In lieu of a cash advance, PLs may choose to pay these expenses with personal funds to be reimbursed. If the PL chooses to take a cash advance, the IAP Financial Specialist will work with the PL directly on the set up and reconciliation processes. All payments, using cash advance or personal funds, must adhere to university policies and procedures. Receipts must be submitted for all expenses regardless of payment method or amount. Please refer to section D. Accounting Guidelines and Requirements for more information.

Cash Advances
PLs will receive specific instructions from their Financial Specialist regarding this process.

If the PL has spent less than the cash advance amount, the expense report will indicate this as well as the amount of the difference that the PL must pay back to the university. PLs typically pay back unspent portions of their cash advance by check, made out to UW-Madison. If the PL has spent more than the cash advance amount, and the purchases were approved by IAP and follow university policy, the expense report will indicate this and the amount the PL is to be reimbursed.

E-reimbursement
If a PL chooses not to use a cash advance, they may choose to use personal funds to be reimbursed. All expenses must be program related and approved by IAP, and follow all university policies and procedures for expense reimbursement.

Alcohol charges are never covered as they are prohibited by state law.

3. **Gifts**

A gift is a voluntary conveyance of something of value as a gesture of goodwill or appreciation. Per UW System policy, gifts may be given to foreign nationals when University personnel are visiting other countries and gifts are necessary, customary and reasonable in cost. Normally, all gifts should be items of minimal value that bear the University's logo. No cash gifts are permitted. If gifts are necessary and customary for the program location, please let the IAP Financial Specialist know. IAP keeps some appropriate gifts within our office for PLs to use.

4. **Accounting Guidelines and Requirements**

During the program, it is the PL's responsibility to obtain receipts and invoices for any payments made. To facilitate a seamless and prompt reconciliation of the budget these receipts/invoices should be as complete as possible.

Receipts must be submitted for all expenses regardless of payment method or amount. All receipts must be for program expenses and follow university policy. UW-Madison Accounting Services provides a helpful online index of policies.

PLs are to keep a receipt expense log. The IAP Financial Specialist will provide a log for the PL to use, uploaded in My Study Abroad. This log is to keep track of the expense each receipt is for (the business purpose of the expense), what budget line item the expense falls under, and the amount (in the currency paid).

PLs must submit all receipts and supporting documentation within two weeks (14 days) of their return. This allows the PL and the IAP Financial Specialist sufficient time to discuss expenses and resolve any questions. The Financial Specialist will then create the expense report, and the PL must review and submit the report. **University policy requires that all program expenses be reconciled within 30 days of the program end date.**

Missing receipts: PLs receive blank receipt forms that can be used to report expenses for which a receipt cannot be obtained, a receipt was lost, or requesting a receipt would be culturally inappropriate. Blank receipt forms need to include the following information:
  ➢ The name of the person or company paid and affiliation to the program;
  ➢ The service or good purchased (translated to English, if necessary);
  ➢ Date or duration of service;
  ➢ Amount of purchase and currency purchased with.

The State of Wisconsin does not recognize payment for alcoholic beverages. No receipts may be submitted for IAP program business for alcoholic beverages. Even though social norms and laws regarding alcohol consumption vary from country to country, alcohol is not permitted at any program-sponsored event for students and IAP strongly recommends against Program Leaders and program staff consuming alcohol at any time with students present.

5. **Legal Matters**

Before signing any document for the program that has legal or financial obligations, you should consult with IAP. Many contractual documents (for example, service agreements or leases) will need to be signed by the Vice Provost/Dean or UW-Madison Purchasing Services.

If a situation arises, in which you think legal counsel may be required, consult with IAP before contracting for services. There are special approval procedures that must be followed before legal counsel can be used.

VI. CHECKLIST OF PROGRAM LEADER TASKS

Please note: This is a general checklist of items and timelines for completion. Some programs may require additional checklist items and/or items may be subject to change. Please consult with your Program Team for additional guidance.
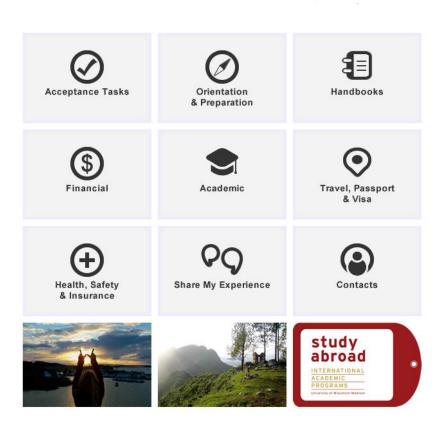
Before Program Leader Training:

- ☐ Read the Part I and Part II Program Leader Manuals found in your MySA account
- ☐ Sign your appointment letter and submit to Nikki Davis along with a copy of your CV/resume
- ☐ Promote your program to students and colleagues in your department/UW >>
- ☐ Review applications, if applicable, in consultation with Study Abroad Staff >>
- ☐ Log-in to MySA to review the resources available for the program >>
- ☐ Review the Study Abroad Handbook found in your MySA account
- ☐ Ensure your passport is valid at least 6 months after the program end date
- ☐ Apply for your visa, if necessary
- ☐ Complete the Campus Security Authority (CSA) online training >>
- ☐ Review DoIT's online resource: The Academic Professional's Guide to Safe Computing When Traveling Abroad >>
- ☐ Attend PL training (see appointment letter for date/time)

Before Departure for Program:

- ☐ Book your flight with Fox World Travel in consultation with your IAP Financial Specialist >>
- ☐ Provide edits to the program-specific handbook to your SAA
- ☐ Conduct pre-departure orientation in conjunction with your SAA >>
- ☐ Finalize syllabus
- ☐ Finalize program itinerary in consultation with your SAA
- ☐ Create a Learn@UW page for the program, if desired
- ☐ Register on-line with the STEP program through the U.S. Embassy (non U.S. citizens should register at your home country's embassy) >>
- ☐ Meet with your healthcare provider and/or travel nurse to discuss your travel plans. Get needed immunizations
- ☐ Obtain copies of your current prescriptions and bring all necessary prescription medications with you abroad
- ☐ Know how you plan to handle money while abroad, how much to take, and how to get emergency funds if necessary
- ☐ Call bank and/or credit card company and inform them of the dates you will be abroad
- ☐ Make photocopies of important documents (passport, visa, insurance card, prescriptions, credit cards, etc.) to bring with you and to leave at home (or store securely digitally)
- ☐ Provide your SAA with the cell phone number you plan to use while in-country
- ☐ UW-Madison Employees: Ensure your emergency contacts are updated in MyUW.
- ☐ Non UW-Madison Employees: Provide the name, phone(s), and email contact for an emergency contact for you to your SAA or PC
- ☐ Provide detailed program itinerary

APPENDIX A: MySA STUDENT VIEW

APPENDIX B: Course Equivalent Request (CER) Information

All students need to have an approved course equivalent for each course that they are completing abroad. This is true regardless of whether the course is required credit or elective credit. All students must submit their course equivalent requests (CERs) through the Academic Tab in their MyStudyAbroad account. There are two ways that students can submit a CER.

Option 1: This is for courses that have a pre-approved equivalent, as will be the case on many of our short-term programs. If the course abroad has multiple equivalents to choose from, it is up to students to determine which equivalent is best for their academic plans. Students will check a box for the equivalent that they select and submit the form. The Enrollment Specialist Advisor (ESA) for the program receives these requests and adds them to students' records.

Option 2: Students use this option when a course abroad does not have a pre-approved equivalent or if they would like to request a different equivalent than what is already assigned. It will require students to select the UW-Madison course that they would like to receive as an equivalent. However, it is also important that the equivalent they request match the foreign course in content, breadth and level. Ultimately, the relevant UW-Madison academic department will do the final review and approval for these new requests.

This option prompts students to provide information and documentation about their course abroad, including:

1. The number of classroom contact hours for which the student is enrolled in the course each week and the number of foreign course credits. The student should also indicate whether the class is a semester or a year-long course. This information helps academic departments decide what equivalent is most appropriate to give for each course.

2. A detailed syllabus outlining what is covered in the class, the titles and authors of books that are used, as well as other connected learning opportunities (e.g. fieldtrips). The syllabus should also have a general outline of the expectations for the semester and the basis upon which students are graded. The syllabus should be in English if the department reviewing the request is not a language department.

3. If a course does not have a formal syllabus, students will create a syllabus that contains information from the previous two bullets. Students can create a syllabus through their MySA account as part of their CER.

After students enter this information, they will submit the request. Again, their Enrollment Specialist Advisor will receive the request, but the ESA will then forward the request to the relevant department. The departmental reviewer can decide to either approve the request generally (making it a pre-approved request for future students), approve it for just that student, deny the request but approve it for another in the department, or deny it altogether.

In general, the course equivalent process runs smoothly as long as students provide enough information about their course and request appropriate equivalents. You may need to sit down with students and assist them in looking though the UW-Madison Guide for courses on the UW campus that are close approximates to the type of classes they are taking at their study abroad site.

If you or your students have questions about this process, then you can contact the Enrollment Specialist Advisor for your program.

APPENDIX C:
AGENDA FOR PRE-DEPARTURE ORIENTATION

1) Introductions of Program Leader(s) and Returned Students (if applicable)

2) Introduction of Participants

3) Program Overview

    a. Academics
   - Learning objectives
   - Academic preparation before departure
   - On-site academic program, including course and credit earned on the program
   - Daily class schedule, typical classroom, daily coursework and exams, grading
   - Academic contacts (as applicable)

    b. Program Leader Expectations of Program Participants

4) Health & Safety of Location
   - Introduce health insurance that participants are enrolled in through CISI
   - Emergency contacts in-country and emergency card
   - Safety in transport
   - Safety in local areas – bad neighborhoods, street crime/theft, etc.
   - Healthcare system in-country

5) Daily Life – feel free to incorporate returned students when covering this section
   - Arrival/Departure Information
   - Typical Day
   - Housing
   - Transportation (how the group will get around during the program)
   - Communication (email/phone/Skype)
   - Money (cost of living, how much to take, etc.)
   - Packing Suggestions
   - Cultural adjustment and norms in host country (alcohol; LGBT, gender, race and identity issues; etc.)
   - Things to do & see locally or regionally

6) Questions & Answers

APPENDIX D:
IAP ACCEPTANCE MATERIALS IN MySA

The materials students will receive via their MySA portal at the time of acceptance are:

- IAP Electronic Acceptance Form
- IAP Acceptance Deposit information
- Electronic Statement of Responsibility, Release of Liability, Authorization and Acknowledgement of Risks
- Health & Wellness Information
- Directions on accessing U.S. Department of State Country Information
- Directions on enrolling in the U.S. Department of State's Smart Traveler Enrollment Program (STEP) Flight Itinerary Form
- Online Orientation Link
- Information on IAP Workshops and Pre-Departure Orientations
- Program-specific Handbook or Program-Specific Academic Notes
- Study Abroad Handbook
- Program dates, visa information as applicable, and various travel resources
- Emergency card