

Study Abroad – Summer/SB Program Director Checklist



March - July / August:

- ☐ Discuss your program plan with your **Academic College**
...some colleges/units have their own specific requirements
- ☐ If considering a **General Education** course, confer with the appropriate **Cluster Coordinators and Committees**
- ☐ **Complete your Program Proposal** (due August 1)
- ☐ Attend a **Budget Overview Training** with the CGE
... for new Directors or those who have taken more than 1 year off from leading a program / want a refresher
- ☐ Continue to **Plan out Logistics** for your Program(s)

September / October:

- ☐ **Recruit** for your Study Abroad Program(s)
- ☐ **Check your Program's Webpage for Accuracy**
(notify the CGE of any errors)
- ☐ **Attend the Fall Director's Meeting** (date TBD)
- ☐ **Draft #1 Budget Projection**
(due to the CGE by September 13)
- ☐ **Attend a Terra Dotta Training** (for app. review)
... for new Directors or those who have taken more than 1 year off from leading a program / want a refresher
- ☐ **Participate in the Study Abroad Fair** (date TBD)
- ☐ **Submit all Course Approvals**
(due to Katie Sensabaugh by October 1)

November / December:

- ☐ **Review Applications and Submit Admission Decisions via Terra Dotta** (estimated November 4-16)
-Check with co-directors (if applicable) before entering reviewer recommendations in Terra Dotta

- ☐ **Confirm with the CGE** if your Program will continue to Accept Applications...

- ☐ Accepting on a Rolling Basis
- ☐ Waitlist Applications Only
- ☐ Program Closed

- ☐ **Draft #2 Budget Projection**
(due to Boris Escalona by November 30)

- ☐ **Reach Out** to your Accepted Students to **encourage Commitment** (Deposit deadline: December 3)

- ☐ **International Accounting (IA) Financial Overview** will be Emailed to Directors

January / February:

- ☐ **Continue to Recruit** for your Study Abroad Program(s)
- ☐ **Final Budget Projects for Spring Break Programs**
(due to the CGE by January 12)
- ☐ **Confirm Program Dates** and details with the CGE
...all dates listed on budget, webpage, and TD should match
- ☐ **Attend the Spring Director's Meeting**
(date TBD)
- ☐ **Attend General Study Abroad Orientation**
(date TBD)
- ☐ **Pre-Approvals for Travel Authorizations are Issued** by the CGE
- ☐ **Attend a 'Short-Term Financial Procedures' Meeting**
... for new Directors or those who have taken more than 1 year off from leading a program / want a refresher
- ☐ **Begin Researching Lodging Options** for your Program
(Do not sign contracts – Send to Int'l Accounting for Signature)

March / April:

- ☐ **Finalize your Program Budget**
(due to the CGE by March 15)
- ☐ **Contact Int'l Accounting to Wire Payments to Vendors**
- ☐ **Hold Program Orientation Meetings** with your Group
- ☐ **Apply for a Visa** (and assist your students) if needed
- ☐ **Check your Passport** for Expiration Date
- ☐ **Attend a Risk Management Training** with the CGE
(Dates TBD)
- ☐ **Order Supplies** for your Program via the CGE
(due to Boris Escalona by March 25)
- ☐ **Book your Flights** for Direct Billing to the CGE
- ☐ **Submit your Transportation Worksheets**
(due to Study Abroad by March 25)
- ☐ If applicable, **Submit Student Assistant Information** to the CGE (due to Boris Escalona by March 25)
- ☐ **Complete ALL Post-Decision Items in Terra Dotta:**
 - ☐ Location & Accommodation Information for Program
 - ☐ Personal Travel Itinerary
 - ☐ Emergency Contact Information
- ☐ **Attend a Financial Workbook Training** with IA
... for new Directors or those who have taken more than 1 year off from leading a program / want a refresher
- ☐ **Meet One-on-One with an assigned International Accounting Staff Member** (after April 1st)
-This will likely happen between 30-60 days prior to your program's departure
- ☐ **Confirm your Study Abroad Course Enrollments**
- ☐ **Check Shared Queries and Reports in Terra Dotta**
 - ☐ Participant List
 - ☐ Health and Emergency Treatment Authorization (HETA) Forms
 - ☐ Passport Information
 - ☐ Travel Itinerary – Going Abroad

- ☐ **Remind Students about the BEVI Assessment** (Belief, Events, and Values Inventory)

This will be deployed to them via Terra Dotta

- ☐ **Enroll in CISI International Health Insurance**
-Only program personnel are enrolled in insurance

-You are able to enroll a family member or dependent after you have been enrolled as a personal / out-of-pocket expense.

- ☐ **Print your CISI Insurance Card** (sent via email)

- ☐ **Check your Learning Content item in Terra Dotta about the Two-Factor Authentication (Duo) and accessing MyMadison while abroad. Don't wait until you're out of the country to figure this out.** See JMU IT page for more information: <https://www.jmu.edu/computing/accountspasswords/two-factor-authentication.shtml>

- ☐ **Gather Phone Numbers and Email Addresses** for all necessary onsite staff. We'll get you started:

Center for Global Engagement

1.540.568.5209 | studyabroad@jmu.edu.

Add your own:

- ☐ _____
- ☐ _____
- ☐ _____

Upon Program Completion:

- ☐ **Financial Reconciliation** with International Accounting
- ☐ **Start a 2023 Program Proposal**
- ☐ **Share Photos and Videos** with the CGE

