

Completing your Annual Report

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Today's Focus

- ▶ Tuition Exchange Liaison Officer duties
- ▶ Annual Report
- ▶ Best Practices
- ▶ TE Membership Services
- ▶ Export/Import 3 (E/I3)
- ▶ Double Credit 3 (DC3)

Tuition Exchange Liaison Officer duties

- ▶ Website Review and Update
 - ▶ **Annual Report due date is by October 31, 2014**
- ▶ Where do I find my Annual Report
 - ▶ www.tuitionexchange.org
 - ▶ Select liaison officer tab
 - ▶ Log into your TE portal
 - ▶ Look left in the blue section under the REPORTS section
 - ▶ Click Annual Report to open

Annual Report

- ▶ **Instructions for the Annual Report**
 - ▶ Refer to 2014-15 Tuition Exchange Annual Report Checklist
 - ▶ Available in the TE Resources portal
 - ▶ **TELO Only Forms section**
 - ▶ **TE 2014 - 15 Training folder**

- ▶ My annual report is lacking student names
 - ▶ Why aren't all my students listed?
 - ▶ Possible reasons
 - ▶ Late applicant
 - ▶ Never approved by the other school
 - ▶ You must add ALL new, enrolled students

- ▶ Best Practice Hint! Keep a copy of your report.

Annual Report

- ▶ Late applicants and TE applications not approved
 - ▶ Require manual adding
 - ▶ To your Annual Report
 - ▶ Need “official email”?
 - ▶ Ask the other TELO to send you one
 - ▶ Remember once the year is closed – no one is able to communicate via the TE Application process
- ▶ New TE scholars
 - ▶ Require manual adding
 - ▶ To Annual Report
 - ▶ Prior to August 1 – you received TE notification indicating action required

- ▶ Best Practice Hint! Confirm with employee in advance confirming dependent enrollment and name of school

Example of Annual Report

Add new students by [clicking here](#) (importing/exporting)

Imports for 2014-2015

Name	SSN	Exp. Inst.	Start Date	Exp Date	Semesters Remaining
Smith, J	1234	XYZ	9/1/14	6/1/2018	calculates

Exports for 2014-2015

Name	SSN	Imp. Inst.	Start Date	Exp Date	Re-cert box
Jones, J	5678	ABC	9/1/14	6/1/2017	check this

Annual Report

Items to confirm:

- ▶ The basic tuition for current academic year
- ▶ Value of your Tuition Exchange Scholarship
- ▶ Total number of [extra credits](#) for full room
- ▶ Your e-mail address
- ▶ **DON'T FORGET TO HIT SUBMIT!**

Fee Invoice

- ▶ **Dues and Fees Invoices**

 - Membership Dues

 - Participation Fees Statement

 - ▶ Print Invoice

 - ▶ This represents your school's exports

 - ▶ Request check from Comptroller/Business Office

 - ▶ Mail Invoice and check to Tuition Exchange

Note: Currently TE Central is unable to accept electronic payments.

Best Practice Hint! Many schools charge the college employee the Participation fee. If you decide to bill your employee(s) the TE member school still needs to make one FEE payment to TE Central.

Best Practices

- ▶ Communicate often with your eligible clientele
 - ▶ Paycheck news letters
 - ▶ Benefit fairs
 - ▶ Intranet
- ▶ Contact TE Central
 - ▶ Table tents
 - ▶ General brochures

- ▶ Best Practice Hint! Add a section on your website directing your families to our website for general information

Best Practices

- ▶ Communicate
 - ▶ Tuition Exchange Liaison Officer contact information
 - ▶ TE Policy and Procedures for applicants
 - ▶ If you have specific annual requirements make them BOLD!
 - ▶ Application deadline
 - ▶ Application Process
 - ▶ Initial
 - ▶ Be sure to share funded student's names and amounts with the Financial Aid Office and Admissions
 - ▶ Renewal
 - ▶ Be sure to keep Financial Aid in the know
- ▶ Create and share an Annual Report with your school community
 - ▶ Example available in the TELO Resources portal

TE Membership Services

- ▶ Website updated
 - ▶ Next update is TELO Portal
- ▶ Electronic communication with member schools
- ▶ Training
 - ▶ Online via Go To Webinar
 - ▶ Monthly on a Thursday
 - ▶ Live events 3 planned for in 2014-15
 - ▶ Midwest Chicago – October 20
 - ▶ Southwest location TBD – November 5
 - ▶ South location TBD – Spring date TBD

TE Membership Services

- ▶ Web site
 - ▶ TELO only portal
- ▶ TE employees have TE experience
- ▶ Marketing materials at no cost
 - ▶ Table tents
 - ▶ Generic brochures
 - ▶ Link our website to yours
 - ▶ New opportunities coming
 - ▶ TE Logo available

Export/Import 3

- ▶ Allows each member institution:
 - ▶ Regardless of Export standing (good standing, alert status or restriction)
 - ▶ Opportunity to export up to three new students each academic year
- ▶ Begins with the 2014-15 academic year
- ▶ Update your TE profile
 - ▶ Item 7
 - ▶ Yes, means you will participate
 - ▶ No, means you will NOT participate

HINT: If your school signs up—be sure to share this new opportunity with your eligible employees and your Enrollment Management staff

Export/Import 3

- ▶ TE Member schools annual expectations
 - ▶ If exporting students on the E/I3 options
 - ▶ Shall award E/I 3 TE scholarships to at least an equal number of eligible admitted students
 - ▶ If a E/I 3 TE student is admitted, the school must offer a TE scholarship
 - ▶ The key word is offer
 - ▶ The E/I 3 student may decline and your school still met the annual expectation
- ▶ TE member school choice
 - ▶ Not obligated to offer this option to import TE candidates
 - ▶ Importing school is under no obligation to grant TE students special consideration regarding admission decisions
 - ▶ If your school signs-up for E/I 3, your school should NEVER be on restriction

HINT: Offer means the student is awarded the E/I 3 TE scholarship – it does not mean the student accepts it and attends

Export/Import 3

- ▶ The TE member schools exporting under the E/I 3 provision is
 - ▶ Obligated to award TE scholarships to at least an equal number of imports
 - ▶ For example, the school exports two students under the E/I 3 provision the exporting school is obliged to award E/I 3 awards to at least two imports to accepted TE candidates
- ▶ Tracking of Export/Import 3
 - ▶ TE Central is working on making programming changes – stay tuned
- ▶ Want to know which schools signed up for E/I3
 - ▶ TELO homepage
 - ▶ Left side in the blue section
 - ▶ REPORTS section
 - ▶ Last report – E/I 3 Participants

Double Credit 3

- ▶ Does your school participate in other recognized Exchange programs?
 - ▶ If yes – this may be a way to increase your ability to export.
- ▶ Allows TE member institution
 - ▶ Opportunity to double count up to three new import students each academic year for a total of 6 extra semester credits annually
- ▶ Begins with the 2014-15 academic year
- ▶ TE member schools are not obligated to participate in DC 3
- ▶ If the school is in a status other than Satisfactory, DC 3 provides a double credit option

HINT: Coordinate TE scholars with other campus Exchange officers. Don't forget to share this with your Enrollment Management Staff.

Double Credit 3

- ▶ What is a TE recognized eligible Exchange program
 - ▶ Recognized national and/or regional exchange programs
 - ▶ It does not include individual schools with one-to-one consortium agreements
 - ▶ Have questions about what is a recognized program - contact TE Central
- ▶ Cost
 - ▶ The double credit option is an import TE Participation fee of \$35
 - ▶ TE Central will bill separately for 2014/15
 - ▶ Stay tuned for additional information

HINT: Consider participating if your school wants to exchange at a higher level than E/I3 provides.

Double Credit 3

- ▶ How does DC 3 work?
 - ▶ TE Members wishing to participate connect the double counted IMPORT like you connect students with the correct exporting institution
 - ▶ Remember in this situation – You are the IMPORTING school and the Exchange program is the EXPORTING school
 - ▶ This is a manual ADD process to your Annual Report
 - ▶ To add a student more than once in the DC 3 category use the student ID of 5555 and be sure to type their ENTIRE name
 - ▶ The current system is sensitive to matching duplicates

Double Credit 3

- ▶ Recognized DC 3 programs are listed inside the TELO Resources Portal
- ▶ Exchange programs are included in the member school listing and all begin with XP and end with program name
- ▶ TE Central may ask TE Member schools for additional information regarding this program

Lets Recap

- ▶ Tuition Exchange Liaison Officer duties
- ▶ Annual Report
- ▶ Best Practices
- ▶ TE Membership Services
- ▶ Export/Import 3 (E/I3)
- ▶ Double Count 3 (D C3)

Questions



Upcoming Training Opportunities

- ▶ October 9, 2014 Webinar 1:00 central time
 - ▶ Marketing your TE program across campus
 - ▶ Understanding capacity
 - ▶ Updating your TE Policy and Procedures
- ▶ Webinar invitations will be emailed no later than October 1 but you can register now; use the address below.

<https://attendee.gotowebinar.com/register/7729088815990264578>

Contact Information

- ▶ www.tuitionexchange.org
- ▶ Janet Dodson - general questions and issues
 - ▶ jdodson@tuitionexchange.org
- ▶ Kristine Lev - billing and fee questions
 - ▶ klev@tuitionexchange.org
- ▶ Bob Shorb - general questions and issues
 - ▶ rshorb@tuitionexchange.org

As a reminder: All 2014-15 Webinar training will be posted inside the TELO Resources portal. This includes the recorded event, handouts and power point presentation.

Login is TELO@tuitionexchange.org

Password: TELO14