

Annual Report 2015

Janet Dodson

Associate Director, Communications

9/22/2015

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Today's Focus

- ▶ Annual Report
- ▶ Participation Fees
- ▶ Changes comes with new systems
- ▶ Updating your Mandatory Profile
- ▶ News from TE Central

Annual Report

- ▶ Due by October 30
- ▶ Participation fees (P-fees)
- ▶ Changes come with new systems
- ▶ Requires both Export and Import school involvement

Annual Report

▶ Due date

▶ October 30



Please be timely!!!

Participation Fees - (P-Fees)

- ▶ Two types of P-fees
 - ▶ Export fee at \$35 per EXPORT student
 - ▶ Import fee at \$35 per Double Credit 3 (DC3) IMPORT student
 - ▶ P-fees are not prorated
 - ▶ P-fees may be passed on to the family
 - ▶ The TE member school is responsible for payment to TE Central upon completion your Annual Report

P-fee statement

Dues and Fees Invoices
Membership Dues
Participation Fees Statement

Click on Participate Fees Statement link

Request payment for Balance Due amount

Interested in ACH payment options? Contact Kristine Lev at klev@tuitionexchange.org

The Tuition Exchange
3 Bethesda Metro Center, Suite 700
Bethesda, MD 20814

The Tuition Exchange, Inc.
Statement for 2015-2016 Academic Year
Participation Fees

Ms Testy Tester
Associate Director
TE TEST SITE
123 County Road
Tuition Heights, XP 12345

Participation Fees	\$35.00	(1 exported students)
Double Credit Participation Fees	\$0.00	(0 double credit students)
Fees Paid	\$0.00	
Balance Due	\$35.00	

Make the check payable to "The Tuition Exchange, Inc." and return to:

Be sure to confirm our address is correct in your payment system.

Changes come with new systems

- ▶ Export responsibilities
 - ▶ Enter the application
- ▶ Import responsibilities
 - ▶ Accept or Reject the application
 - ▶ Enroll or Withdraw the application
- ▶ Keeping the system up-to-date
 - ▶ Export schools must add the Enrolled application to the Annual Report
 - ▶ Import schools must check the Enrolled box on the application so that the Export school is in the know
 - ▶ Don't know the student's plans? Export School contact the parent
 - ▶ Ok in the eyes of FERPA for schools to ask where the student enrolled
 - ▶ It is a need to know item
 - ▶ Not ok to ask about grades and award amount

Changes come with new systems

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

Imports for 2015-2016					
Name	TE ID	Exp. Inst.	Start Date	Exp. Date	Semesters Remaining
Hughes, Maddison	4279	Stetson University - FL	9/1/2014	6/1/2018	6

Exports for 2015-2016							
Name	TE ID	Imp. Inst.	Start Date	Exp. Date	Semesters Remaining	EI3 for 2015-2016	Re-certify 2016-2017
Lawrence, Reigan	0088	Creighton University - NE	9/1/2014	6/1/2018	6	Yes <input checked="" type="radio"/> No <input type="radio"/>	Re-certify

Help people are missing!!!

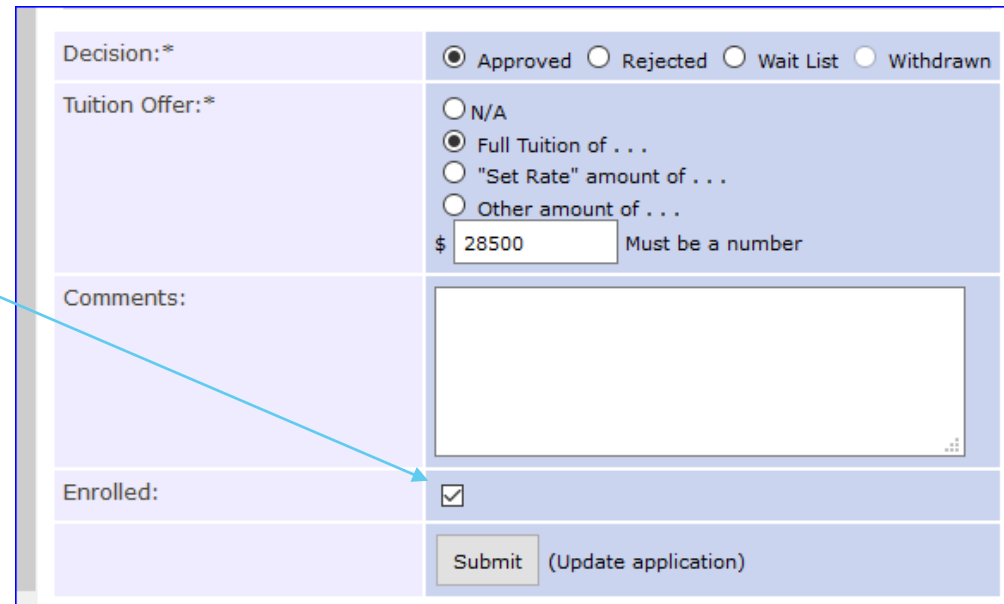
Changes come with new systems

- ▶ Adding new enrolled exports for the current school year
 - ▶ See Snippet “How to add your approved Exports to the Annual Report”
 - ▶ Good news - you no longer have to enter all the details but you do need to add the student!
- ▶ Only Add approved exports to the annual report when the IMPORT school checked the enrolled box

Changes come with new systems

- ▶ Import Schools

- ▶ Must Enroll new students



The screenshot shows a web form with the following fields and options:

- Decision:*** Radio buttons for Approved, Rejected, Wait List, and Withdrawn.
- Tuition Offer:*** Radio buttons for N/A, Full Tuition of . . ., "Set Rate" amount of . . ., and Other amount of . . . Below these is a text input field containing "\$ 28500" and the text "Must be a number".
- Comments:** A large empty text area.
- Enrolled:** A checkbox that is checked () with a blue arrow pointing to it from the text "Must Enroll new students".
- Submit** (Update application) button.

Changes come with new systems

- ▶ Why are my IMPORTS missing?
 - ▶ Export school has not yet Added the student
- ▶ I can't find my school in the drop down box...
 - ▶ Import schools can no longer add students to their Annual Report. Have you checked Enrolled so that Export school can approve?
- ▶ How do I update the expiration date?
 - ▶ If the student has a bad expiration date and it is outside the current year contact TE Central.
- ▶ I need to expire a student. How do I do that?
 - ▶ Students who drop during the semester or do not return for the next term can be updated by Editing - Student - click on Student's name and select DROP STUDENT
- ▶ I need to remove a student from my Annual Report. How do I do that?
 - ▶ Students who NEVER enroll at your school should be DELETED.
Editing - Student - click on Student's name and select DELETE STUDENT

Changes come with new systems

- ▶ Export schools
- ▶ EVERY SCHOOL is an EXPORT school...
 - ▶ May begin the process of entering new exports - beginning September 28
 - ▶ Be careful to enter your new TE applications in the current academic year as now there are TWO years open simultaneously
 - ▶ See slide 13 and 14 for instructions for entering new applications

Online Forms
Scholarship Certification & Application
[Apply 2015-2016](#) | [Apply 2016-2017](#)
[View Applicants](#)

Scholarship Certification & Application	
School Year:	2016 - 2017
Student First Name:*	<input type="text"/>
Student Middle Name:	<input type="text"/>
Student Last Name:*	<input type="text"/>
TE ID:*	<input type="text"/>
Please enter a 4-digit number.	
Student E-mail:*	<input type="text"/>
Telephone:*	<input type="text"/>
Permanent Address:*	<input type="text"/> <input type="text"/> <input type="text"/>
Parent Employment Category:*	<input type="text"/>
Parent/Guardian Name:*	<input type="text"/>
Parent E-mail:*	<input type="text"/>
Years of Parent Employment*:	<input type="text"/>
Total number of academic years*:	<input type="text"/>
Total number of semesters:*	<input type="text"/>
Student is Federal Pell Grant eligible:*	<input type="text"/>
Application Status:*	<input type="text"/>
Class:*	<input type="text"/>

To open up the ability to enter applications you must first submit your annual report

Remember the boxes with * are required and is information that will move forward in future years

For those students who want you to submit their TE application to many schools, hold the Control Key down and using your MOUSE click on the school names. Should the student come back with the request for more, you will need to start with a fresh application

Online Forms
 Scholarship Certification & Application
[Apply 2015-2016](#) | [Apply 2016-2017](#)
[View Applicants](#)

Exports - Approved

2015 - 2016				
Date	Student	TE ID	Imp. Inst	Year
03/22/2015	Dodson, Janet	1375	TE TEST SITE	2015 - 2016
03/31/2015	Doe, John J	1111	TE TEST SITE	2015 - 2016
03/25/2015	Test, First Middle	1234	Tuition Exchange (The)	2015 - 2016

Exports - Decision Pending

2015 - 2016				
Date	Student	TE ID	Imp. Inst	Year
04/01/2015	Doe, Jane	1111	XP - Associated Colleges of the Midwest - XP	2015 - 2016
04/01/2015	Doe, Jane	1111	XP - Associated Colleges of the South - XP	2015 - 2016

2016 - 2017				
Date	Student	TE ID	Imp. Inst	Year
09/22/2015	Cuteness, Susie	2525	Doane College - NE	2016 - 2017

Be sure to pay attention to the category and the year of application

Imports - Decision Pending

2016 - 2017				
Date	Student	TE ID	Exp. Inst	Year
09/22/2015	Cuteness, Susie	2525	TE TEST SITE	2016 - 2017

This is an example of what the IMPORT school sees

Changes come with new system

- ▶ Still working on Email messaging
- ▶ Very generic in nature
- ▶ When EXPORT school enters first time TE applications the student and parent receives the message found below:
- ▶ Currently ,we are not able to customize the messages
 - ▶ Email is a required field

Dear Susie Cuteness, Your Tuition Exchange application(s) recently submitted for TE award consideration are now recorded in the system. The following TE member schools received your TE award application(s).

1. Doane College - NE

If you have questions regarding next steps please contact the Admissions Office at the schools where your application was submitted. Thank You

Updating your Mandatory Profile

- ▶ Provides families with information
- ▶ Tells your datelines
- ▶ Gives families a taste of your school
 - ▶ PLEASE complete your overview
- ▶ Question 4 is a dandy...You are responding to the question... Of the TE applicant pool in 2015-16 how many students who applied for admissions and TE, were admitted and offered a TE scholarship...

Specific deadline date (post date on overview box)

4. Approximately what percentage of the new TE candidates with credentials satisfying the admissions standards at your institution were offered a TE scholarship for the upcoming academic year:

- Not receiving new import candidates for 2014-2015
- 0%-10%
- 11%-40%
- 41%-60%
- 61%-90%
- Usually all or most of the qualified candidates receive an award offer

Updating your Overview Information

- ▶ Question 4 in math terms
 - ▶ 130 applications for Tuition Exchange
 - ▶ 100 of the 130 apply for Admission and Tuition Exchange
 - ▶ 55 of the 100 admitted students offered Tuition Exchange
 - ▶ Answer 41% to 60% on your Overview Information

Updating your Overview Information

- ▶ Confirm your TELO details are correct
- ▶ Read your message - is it friendly
- ▶ Please add the following information - name and email
 - ▶ President
 - ▶ Human Resources
 - ▶ Director of Admission
 - ▶ Director of Financial Aid
- ▶ We are building our data base and need your help!

News from TE Central

- ▶ TE Guideline template is now available for your use
- ▶ Membership Survey via Survey Monkey will be delivered to your mail box next week
- ▶ In-person Training slated for vicinity of Baltimore airport on November 13, 2015. That is the day after Thursday November 12. ☺ Invitations are forthcoming
 - ▶ Spring in-person training will be held in places west of the Mississippi River
- ▶ TE Membership Dues are now late. Please double check your Membership Dues statement

This member has paid their dues

Fee Type	Amount
Institutional Membership Dues	\$500.00
Total Due	\$500.00

This member has NOT paid their dues

Dues and Fees Invoices Membership Dues Participation Fees Statement

Fee Type	Amount
Institutional Membership Dues	\$500.00
Total Due	PAID 07/05/2015

9/22/2015

Let's Recap

- ▶ Annual Report
- ▶ Participation Fees
- ▶ Changes comes with new systems
- ▶ News from TE Central

Reminders

- ▶ This webinar is being recorded and along with the handouts will be posted inside the TELO only Resource section of the web
 - ▶ Can't remember login details - see front page of TELO sign-in page of the TELO portal
 - ▶ All questions will be answered in our standard FAQ format and shared with all attendees
- ▶ All web-based training details are available on the front page in the lower right hand corner
 - ▶ Our October webinar's focus is Communication
- ▶ Need brochures and/or table tents you can order those item on line see below
- ▶ THANK YOU and welcome to a new year of exchanging students, learning and ideas

HOME > LIAISON OFFICERS > BENEFITS >

Tuition Exchange Membership Brochure

You are welcome to make this link available on your website as a way to introduce employees to Tuition Exchange. TE Central can also provide you with a PDF file for your website. Please contact Janet Dodson. [read more](#)

9/22/2015

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Contact information

- ▶ Bob Shorb - Executive Director
 - ▶ Membership Recruitment
 - ▶ rshorb@tuitionexchange.org
- ▶ Janet Dodson - Associate Director Communications
 - ▶ Membership Services and Training
 - ▶ jdodson@tuitionexchange.org
 - ▶ 402.418.1081 For TELO use only
- ▶ Kristine Lev - Assistant Director of Administration
 - ▶ All things Financial
 - ▶ klev@tuitionexchange.org
 - ▶ 301.941.1827
- ▶ Website
 - ▶ www.Tuitionexchange.org