

# Tuition Exchange Webinar January, 2016

2015-16 clean-up and 2016-17 updates

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# Today's focus

- 2015-16 Annual Report review
- 2016-17 Application reminders
- TE Central update
- Survey results
- Recap

# 2015-16 Annual Report Review

- Confirm Annual Report is correct and current
- Are all listed students still enrolled?
  - If no, update the student's expiration date.
  - Editing – student – click on applicable student name

Entry Class	Freshman
Entry Semester	Fall 2013
Student Expires	End of Spring 2017
Program Option	<input checked="" type="radio"/> Traditional <input type="radio"/> Double Credit Program (\$35 fee) <a href="#">What is this?</a>
Importing Institution (School Student will Attend)	<input type="text"/>

End of this  
semester will be  
6.1.16

End of last semester is 1.1.16

# 2015-16 Annual Report Review

- If you discover a student NEVER enrolled – please contact Janet Dodson for further options.
- Do not DELETE a student record. This eliminates the record completely.
- If the student attended at any time during the current school year, you need to withdraw the student with the appropriate expiration date.
  - See previous slide for visual assistance

# 2015-16 Annual Report Review

- Please be mindful when completing TE scholar applications
- Incorrect expiration dates continue to plague the system
  - The system calculates expiration dates based on entering class and number of eligible semesters
  - The system only understands whole numbers
  - The system doesn't understand words in fields that expect numbers

# 2015-16 Annual Report Review

- Once you confirm the Annual Report is correct for second semester SUBMIT IT, REFRESH (Control R) and print a copy for your records.
- Then reprint your Balance Sheet; and
- Finally, reprint your Participation Fees statement.
  
- If the Participation Fee statement shows:
  - a balance due, please remit immediately.
  - an overpayment was made by your school, visit directly with Kristine Lev at [klev@tuitionexchange.org](mailto:klev@tuitionexchange.org)
  
- You are encouraged to keep copies of the report for future information

# 2015-16 Annual Report Review

- If you have a first time TE scholar for second semester please contact Janet for help adding these students.
- Adding second semester scholars means adding to the Annual Report, Balance Sheet and Participation Fees statement so be sure to review, confirm, pay and print all three pieces.
- You will be reminded to review your Annual Report at the conclusion of Spring, 2016.
- The 2015-16 Annual Report information will be removed from the system 6.30.2016. Please be prompt with your final review.

# Reviewing the 2016-17 Application process

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

Scholarship Recertification of Eligibility  
 Annual Report | [View Submissions](#) ←

Scholarship Certification & Application means NEW Student applications

Scholarship Recertification of eligibility means continuing student applications. The recertification process is easy. Open the Annual Report and click the Recertify Button

Semesters Remaining	EI3 for 2015-2016	Re-certify 2016-2017
0	Yes <input checked="" type="radio"/> No <input type="radio"/>	n/a
2	Yes <input checked="" type="radio"/> No <input type="radio"/>	Re-certified
0	Yes <input checked="" type="radio"/> No <input type="radio"/>	n/a
3	Yes <input type="radio"/> No <input checked="" type="radio"/>	Re-certified

If the box reads Re-certified your work is done. If it reads RECERTIFY – click the button for all eligible students





# Reviewing the 2016-17 Application process

- In the case of a Re-certified student who is no longer eligible – update the continuing student’s expiration date. That will over-ride the original re-certified process.

Entry Class	Freshman
Entry Semester	Fall 2013
Student Expires	End of Spring 2017
Program Option	<input checked="" type="radio"/> Traditional <input type="radio"/> Double Credit Program (\$35 fee) <a href="#">What is this?</a>
Importing Institution (School Student will Attend)	<input type="text"/>

# Reviewing the 2016-17 Application process

School Year:	2016-2017
Student First Name:	Janet
Student Middle Name:	K
Student Last Name:	Hanson
TE ID:	1234
Student E-mail:	jdodson@tuitionexchange.org 
Telephone:	402.418.1081
Permanent Address:	3 Bethesda Metro Center Station Suite 700 Bethesda, MD 20814
Parent Employment Category:	Staff (non-faculty)
Parent/Guardian Name:	Norman Hanson
Parent E-mail:	jdodson@tuitionexchange.org 
Years of Parent Employment:	18
Total number of academic years:	4
Total number of semesters:	8
Student is Federal Pell Grant eligible:	No
Application Status:	Applying for Admission
Class:	Freshman
Applying To:	HBP



Both email addresses will receive an email informing them the application has been submitted

# Reviewing the 2016-17 Application process

This is an example of the student email.

Dear Janet Hanson, 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). HBP  
If you have questions regarding next steps please contact the Admissions Office at the schools where your application was submitted. Thank You

This is an example of the parent email.

Dear Norman Hanson, Your Tuition Exchange application(s) recently submitted for TE award consideration are now recorded in the system. Applications have been submitted to the following institutions on behalf of Janet Hanson: HBP  
If you have questions regarding next steps please contact the Admissions Office at the schools where your application was submitted. Thank You

The email is mailed to all applications when valid email addresses are provided. Encourage your families to provide valid email addresses and to check their spam folder

# Application items needing attention and understanding

Total number of semesters means  
Entering Freshman – 8  
Second year student – 6  
Third year student – 4  
Fourth year student – 2  
Graduate student 4 or 2

The total number of academic years  
For Undergrads generally means 1, 2, 3 or 4  
For Graduate students generally means 1 or 2

Total number of academic years*:	<input type="text"/>
Total number of semesters:*	<input type="text"/>
Student is Federal Pell Grant eligible:*	<input type="text" value="v"/>
Application Status:*	<input type="text" value="v"/>
Class:*	<input type="text" value="v"/>

This field is going away!

Class is based on what you know  
At the time the application is presented.  
Looking to update the language to First year,  
Second year, etc.

Application status of the  
application at the time  
the application is entered.  
Use the drop down options  
presented

# Application items needing attention and understanding

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

## Applicants

Imports - Approved

**2016 - 2017**

Date	Student	TE ID	Exp. Inst	Year
09/28/2015	Test, Test	1233	Tuition Exchange (The)	2016 - 2017

Imports are students that will attend YOUR school.

There are 4 potential categories

Pending – these are awaiting a decision by your school

Approved – these students were offered an award at your school

Denied/Rejected – these students were reviewed and NOT offered an award

Withdrawn – these students are no longer interested in an award from your school

# Application items needing attention and understanding

Decision:*	<input checked="" type="radio"/> Approved <input type="radio"/> Rejected <input type="radio"/> Wait List <input type="radio"/> Withdrawn
Tuition Offer:*	<input type="radio"/> N/A <input type="radio"/> Full Tuition of . . . <input type="radio"/> "Set Rate" amount of . . . <input type="radio"/> Other amount of . . . \$ <input type="text"/> Must be a number
Comments:	<input type="text"/>
Enrolled:	<input type="checkbox"/>
<input type="button" value="Submit"/> (Update application)	

When your school makes a determination on the individual student application  
The application decision requires updating  
When the application is Approved you must also provide a tuition amount  
When the application is Rejected no tuition amount is required  
Comments are helpful but not required.  
**DO NOT** select the ENROLLED option until August, 2016.

# Application items needing attention and understanding

Many students want their applications sent to many schools. To accommodate their request use the following instructions.

- *Applying To Use* pull down box - **hold down CTRL key to choose more than one school** (you can choose as many schools as the student is applying to)

Students may ask that you submit TE applications after their original application. The TE System has school specific tables rather than student specific tables. This means that when students ask you to add more schools to their application – you will need to start over.

TE Central recommends using Firefox or Chrome for the best TE application and report results.

# Application items needing attention and understanding

Below is an example of Export applications.  
As a reminder Exports are your employee dependents.

Exports - Withdrawn				
2016 - 2017				
Date	Student	TE ID	Imp. Inst	Year
11/13/2015	Dodson, Janet Kay	5858	Adelphi University - NY	2016 - 2017
11/19/2015	Stephens, Emma	9999	HBP	2016 - 2017
Exports - Rejected				
2016 - 2017				
Date	Student	TE ID	Imp. Inst	Year
11/05/2015	TEST TEST TEST, Janet Test TEST Janet	9898	Utica College - NY	2016 - 2017
Exports - Approved				
2016 - 2017				
Date	Student	TE ID	Imp. Inst	Year
01/07/2016	Robb, Janet Kay	5454	HBP	2016 - 2017
Exports - Decision Pending				
2016 - 2017				
Date	Student	TE ID	Imp. Inst	Year
11/13/2015	Dodson, Janet Kay	5858	AIB College of Business - IA	2016 - 2017
11/13/2015	Dodson, Janet Kay	5858	Albany Law School - NY	2016 - 2017



# Application items needing attention and understanding

The student who alerts either the TELO at the Export School or personnel at the Import school that they are NO LONGER interested in attending XYZ School should be withdrawn.

As a courtesy please add comments that will apprise the Importing TELO why the student record was updated.

In order for the update to process be sure to hit the SUBMIT button.

Student is Federal Pell Grant eligible:	Unknown
Application Status:	Withdrawn
Class:	Freshman
Exporting Comments:	<div style="border: 1px solid gray; height: 100px;"></div>
Enrolled:	<input type="checkbox"/>
Decision:	Withdrawn
Tuition Offer:	
Decision Comments:	None
<input type="button" value="Submit"/> (Update application)	
<input type="button" value="Add Student"/> (Will enroll student automatically) <input type="button" value="Withdraw Application"/>	

# Application items needing attention and understanding

Typically, the task of Reject falls to the Importing school. This option is used when the student is not admissible, the student no longer meets eligibility requirements, or, the parent is no longer an eligible employee.

As a courtesy please add comments that will apprise all a reason. Remember the issue of FERPA or HIPPA. Be sure to click on the SUBMIT button for the system to update properly.

Exporting Comments:	<input type="text" value="Student not accepted for admission"/>
Enrolled:	<input type="checkbox"/>
Decision:	Rejected
Tuition Offer:	Rejected
Decision Comments:	None
	<input type="button" value="Submit"/> (Update application)
	<input type="button" value="Add Student"/> (Will enroll student automatically) <input type="button" value="Withdraw Application"/>

# Application items needing attention and understanding

This application is approved. This means the student will be offered a TE award at this school. Note the tuition offer will be detailed. This approval process is completed by the IMPORTING school.

Application Status:	Approved for Admission <input type="text"/>
Class:	Freshman <input type="text"/>
Exporting Comments:	test <input type="text"/>
Enrolled:	<input type="checkbox"/>
Decision:	Approved
Tuition Offer:	Full Tuition of, 5
Decision Comments:	None
<input type="button" value="Submit"/> (Update application)	
<input type="button" value="Add Student"/> (Will enroll student automatically) <input type="button" value="Withdraw Application"/>	

# Application items needing attention and understanding

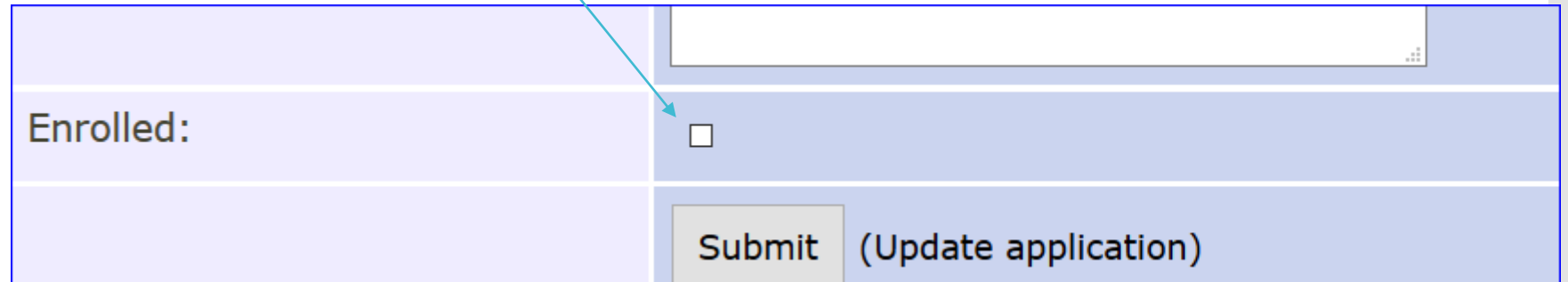
Decision pending applications will stay in this status until the application has Action. If the student never completes the admission process the student's application will not move. Once the new year begins TE Central suggests IMPORTING schools update the incomplete applications to the status of REJECT. Comments are always helpful. Be sure to click the SUBMIT button

Exports - Decision Pending				
2016 - 2017				
Date	Student	TE ID	Imp. Inst	Year
11/13/2015	Dodson, Janet Kay	5858	AIB College of Business - IA	2016 - 2017
11/13/2015	Dodson, Janet Kay	5858	Albany Law School - NY	2016 - 2017

Decision:*	<input type="radio"/> Approved <input type="radio"/> Rejected <input type="radio"/> Wait List <input type="radio"/> Withdrawn
Tuition Offer:*	<input type="radio"/> N/A <input type="radio"/> Full Tuition of . . . <input type="radio"/> "Set Rate" amount of . . . <input type="radio"/> Other amount of . . . \$ <input type="text"/> Must be a number
Comments:	<input type="text"/>
Enrolled:	<input type="checkbox"/>
<input type="button" value="Submit"/> (Update application)	

# Application items needing attending and understanding

- The Enrolled Box
  - DO NOT click Enrolled until Fall, 2016
  - When clicking the box you automatically WITHDRAW all other applications for this student
  - In order to get the student back in the system, the only option is to add the student to the Waitlist.



	<input type="text"/>
Enrolled:	<input type="checkbox"/>
	<input type="button" value="Submit"/> (Update application)

# TE Central updates

- TELO's ability to update expiration dates will be available for Fall, 2016 and beyond
- TELO's ability to withdraw a current student at the end of Fall, 2015 semester will be available until March 30, 2016
- Please review your Participation Fees statement to confirm all is in order
- TE 2016 Winter Board meeting is January 22. A variety of TELO system updates will be submitted for review and potential funding
- Spring Training opportunities now available. It is important to sign-up today!
  - Denver February 19
  - Dallas March 18
- TE Annual Report due date is moving forward
  - In 2016 the due date is October 14, 2016
  - In 2017 and beyond, September 30

# Membership Survey Results

- In the January 2016 Newsletter TE Central shared an executive summary of your responses.
- Thank you to all who responded.
- TE Central plans to continue the process of surveying TELO's at least once every academic year.
- As a result of the survey – TE Central is forging ahead with the concept of a Common Application for purposes of Tuition Exchange.
  - Several TELO's volunteered to help with this new venture. I will be in touch!!!

# Let's Recap

- 2015-16 Annual Report review and confirmation process
- 2016-17 Application reminders
- TE Central Updates
- Membership Survey response recap



# Upcoming 2016 Events

- January 18 – TE Central closed in honor of Martin Luther King, Jr
- January 22 – TE Board of Directors meeting
- February 9 – TE February webinar Understanding Capacity
- February 19 – Denver Colorado in-person training event

Thank you for attending  
See you February 9<sup>th</sup>, 2016  
Registration open now  
Visit front page of TE website  
lower right hand corner for  
details and registration link

# Presenters Contact information

- Janet Dodson
  - [jdodson@tuitionexchange.org](mailto:jdodson@tuitionexchange.org)
  - 402.418.1081 direct line for TELO