The Tuition Exchange New Administrative System

February 2024 Webinar

TE Central Staff

TUITION EXCHANGE
Open doors.
New opportunities.

Today's Focus

- Student account process
  - Creating a student account
  - FERPA consent
- Student application process
- Tuition Exchange Liaison Officer (TELO) responsibilities
- School profile details
- Academic year information
- Reports
  - Static Reports
  - Query Reports
- What's Next
  - Current system clean-up
  - Training

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Student Account Process

Students create an account

- Inside the account, students can:
  - Modify school choices
    - Add and delete schools
    - The maximum number of schools is 10
  - Update biographical details, email address, and phone number
- Students cannot change any employee (parent) information
  - If the employee or employer information requires a change, a new application is required
- Students can create only one (1) account
  - Decrease, maybe even eliminate duplicate apps
  - Eliminates the dual-parent employed at different member school issue

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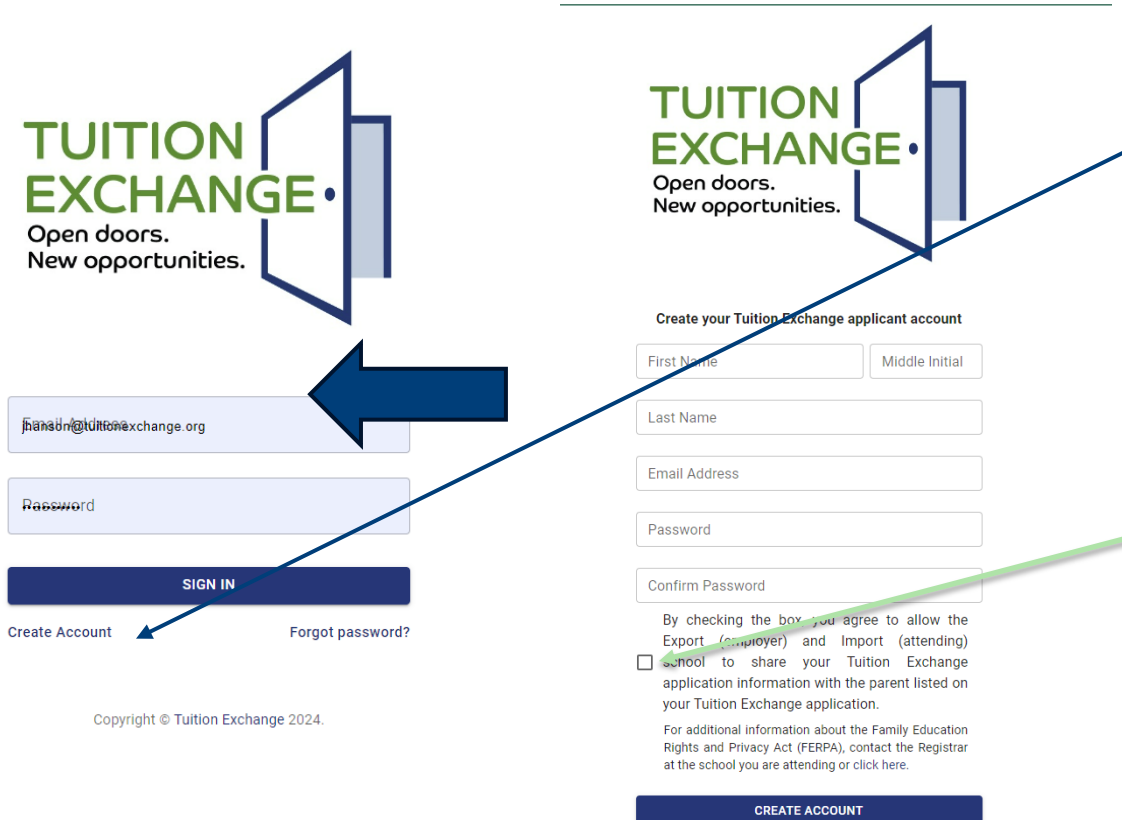
Creating a student account



- The new account process has a specific web address
- It is vital that the student pay attention when creating the account
- The account email is the email of record
- By checking the box, the student agrees that either school can discuss TE scholarship issues with the employee of record

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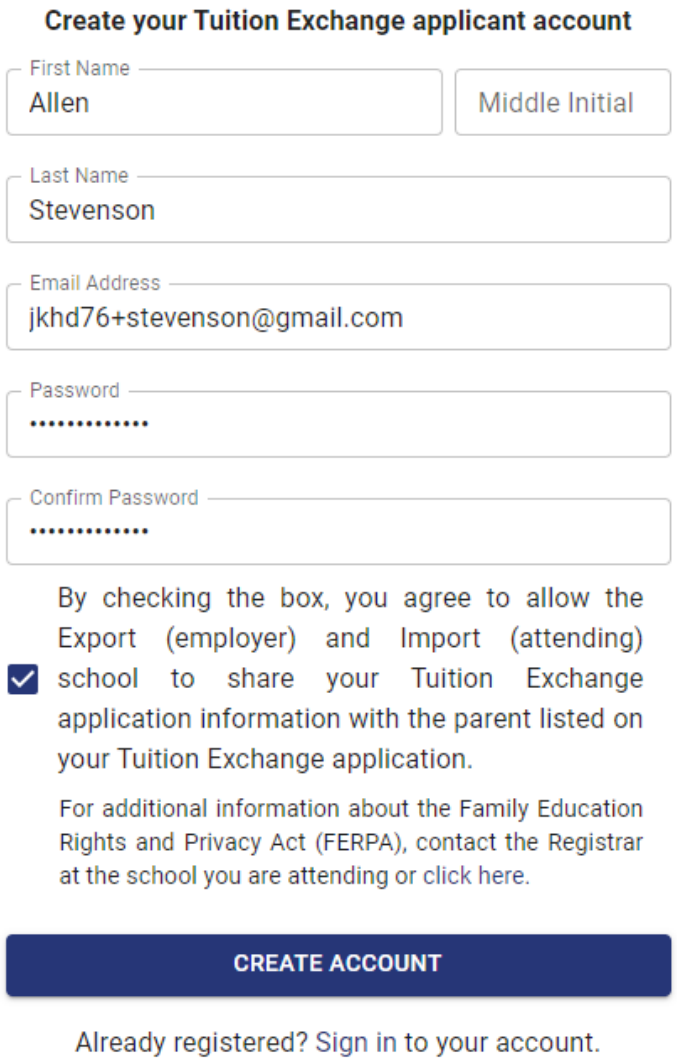
FERPA consent

The student has the option to click the box

If not clicked, FERPA consent is not provided

The FERPA statement is provided only at the time of app creation

If the student wants to remove the consent, it must be done in writing at the school



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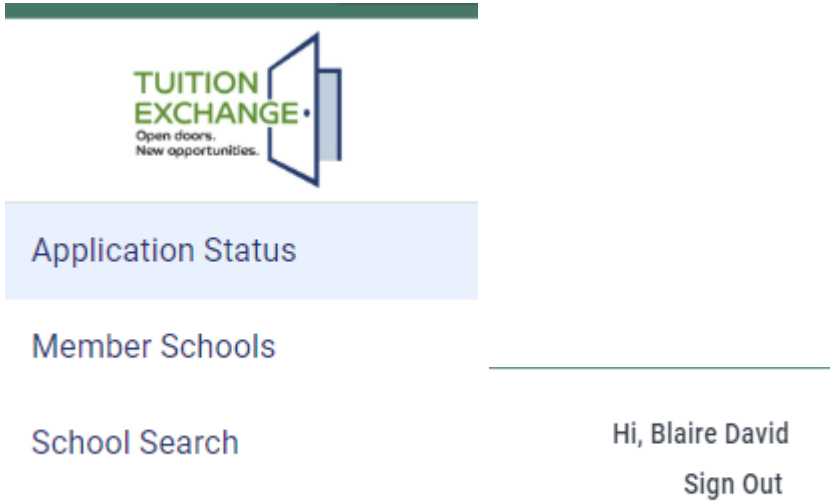
Student application process



- Once the student successfully logs in to the system, the application status appears
- Member Schools will be displayed, but if beyond the Export deadline date, Import deadline date, or lack of school detail, the school will be greyed out – a work still in progress
- School Search will be like the current process – a work still in progress

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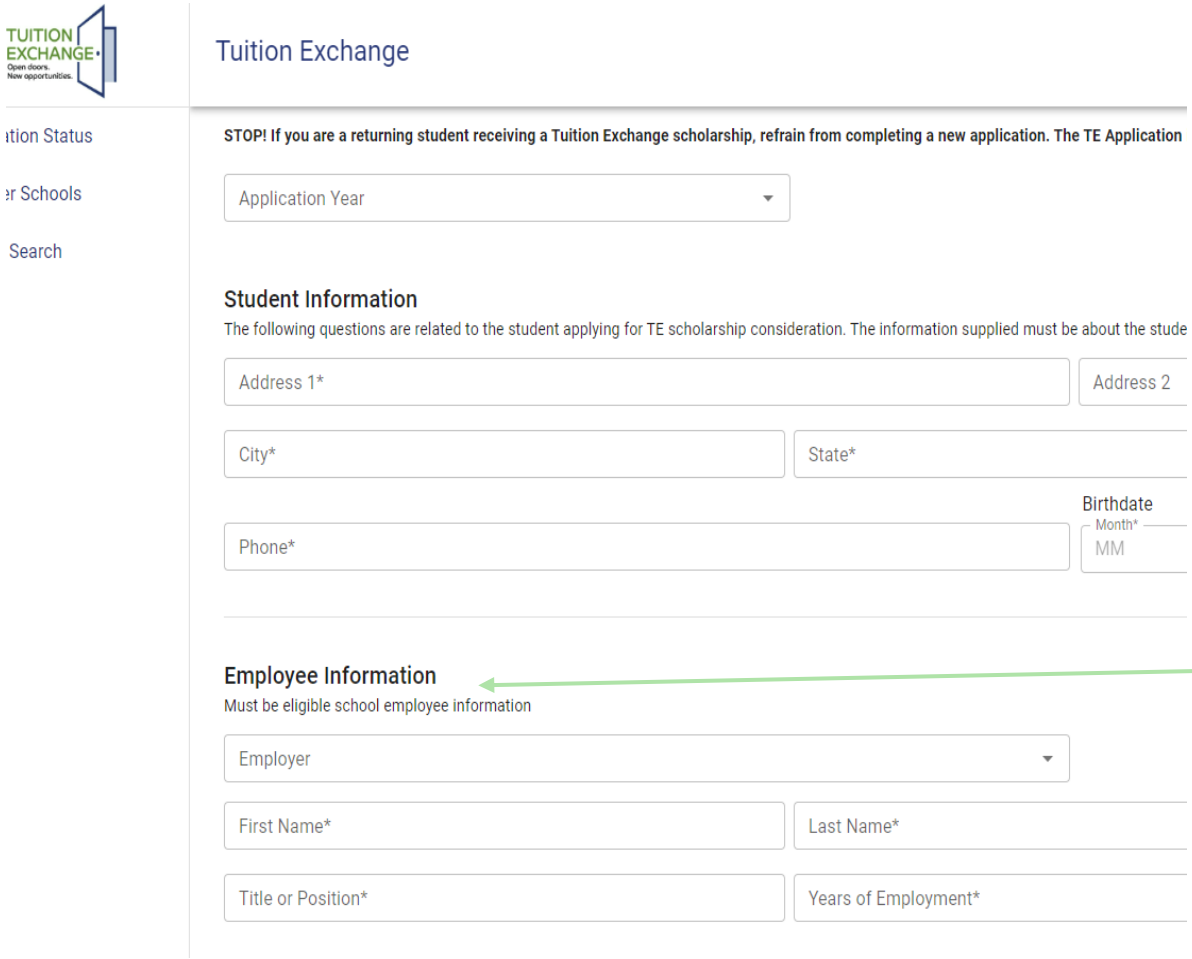
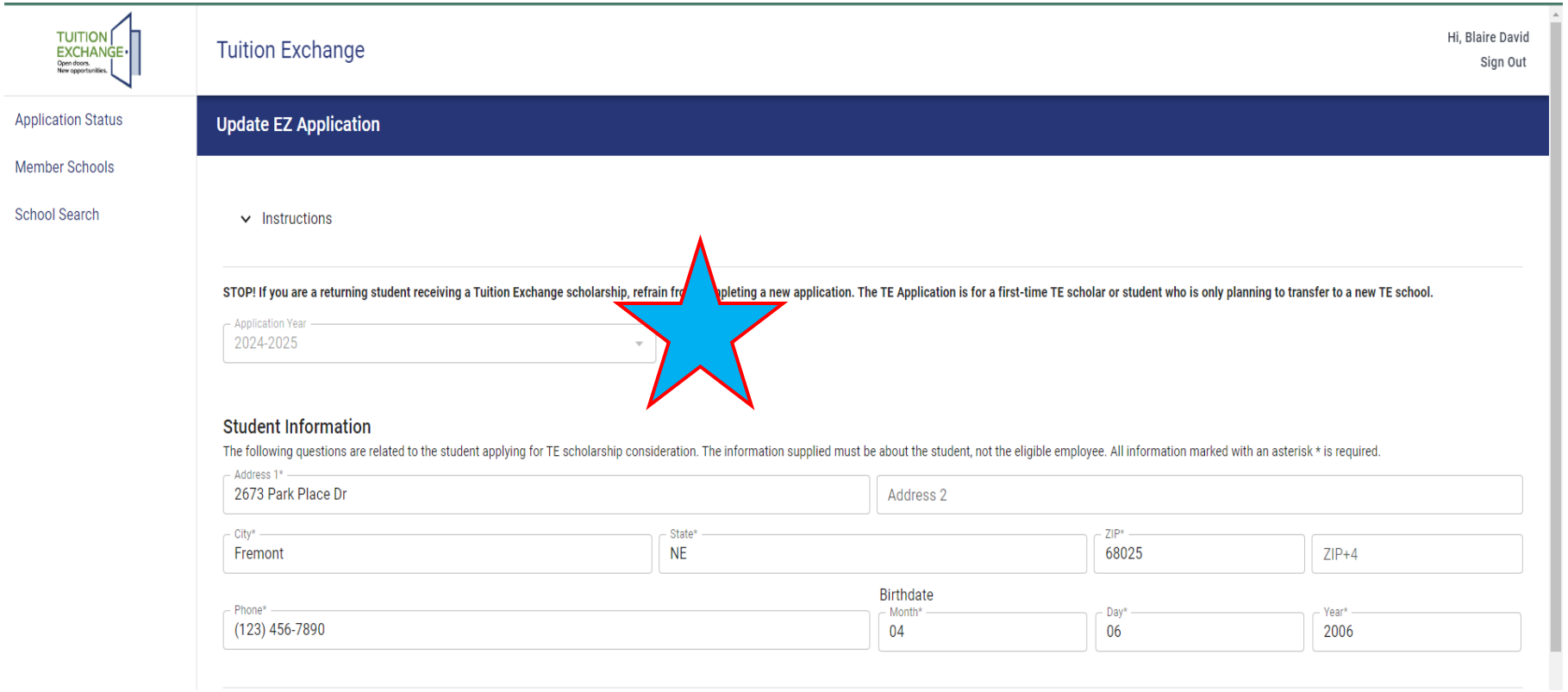
Student application Process

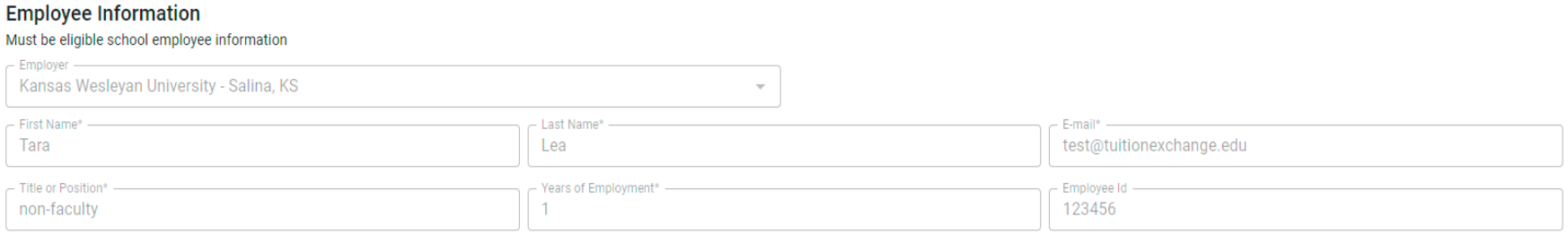


- The student account process freezes the student's name and email address
- The student can update biographical information
- The Employee Information, once entered, freezes and cannot be modified by the applicant

Student application process

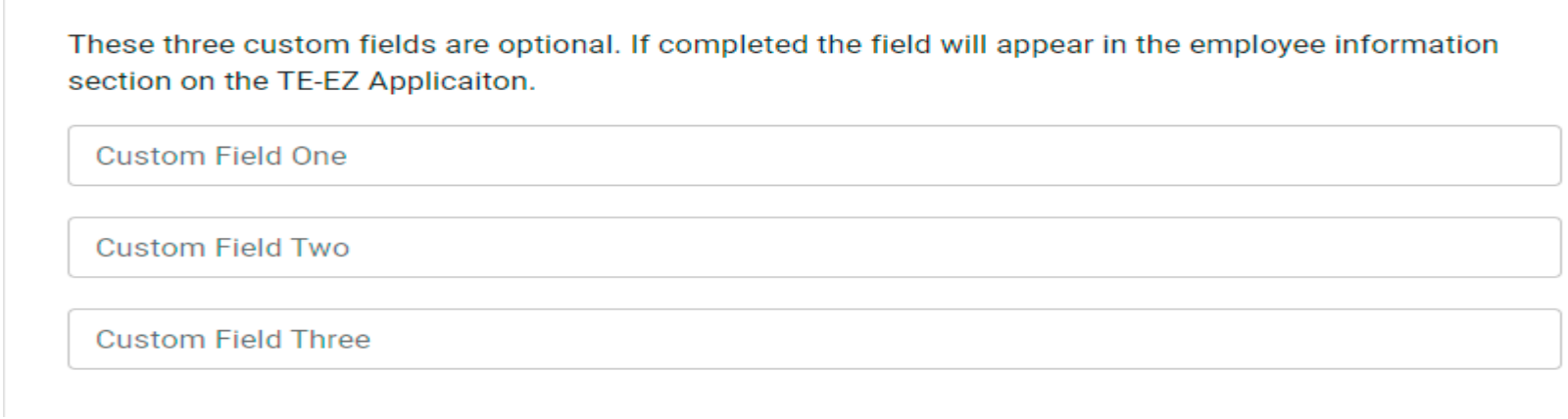


Student application process



The employee information must be of the eligible employee
The email address must be @nameofschool.edu*
The Employee ID is not a required field
TELOs **may** add up to three custom fields

* Schools may modify this requirement



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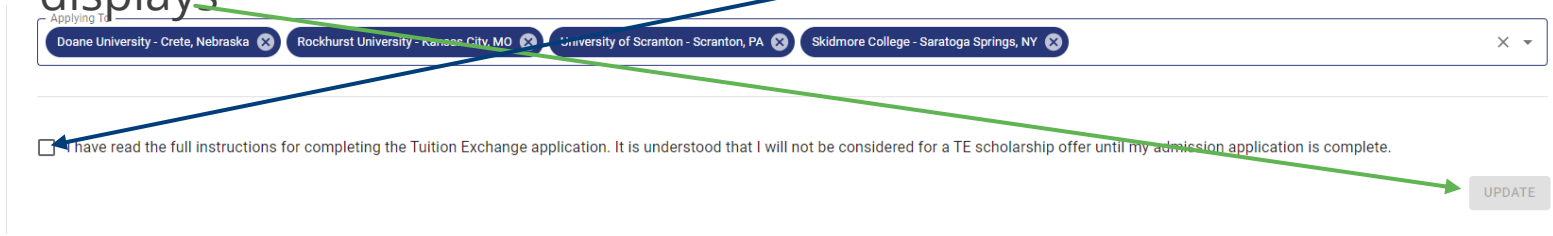
Student application process

- Students can have a maximum of ten (10) active schools
- The applicant must click the I understand box before the UPDATE button displays



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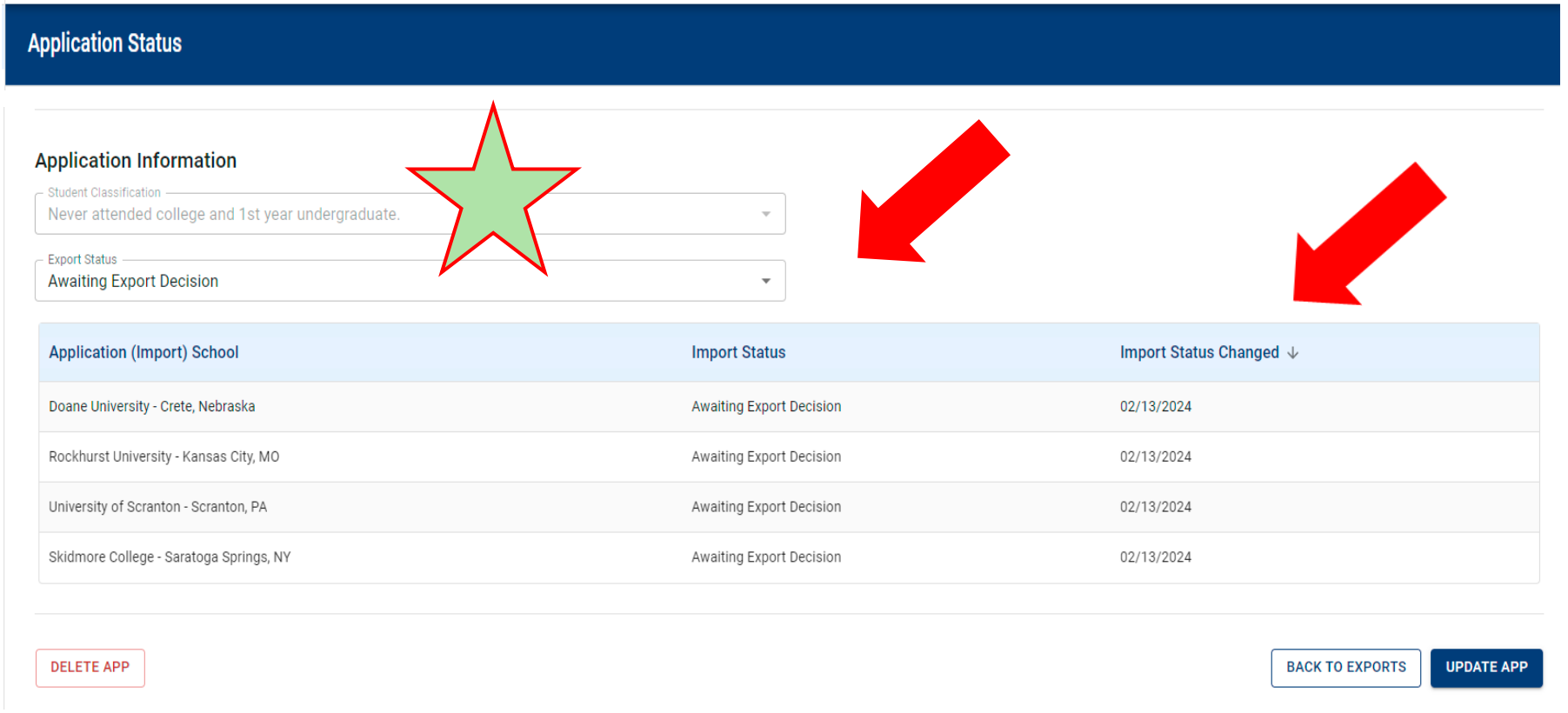
Student application process



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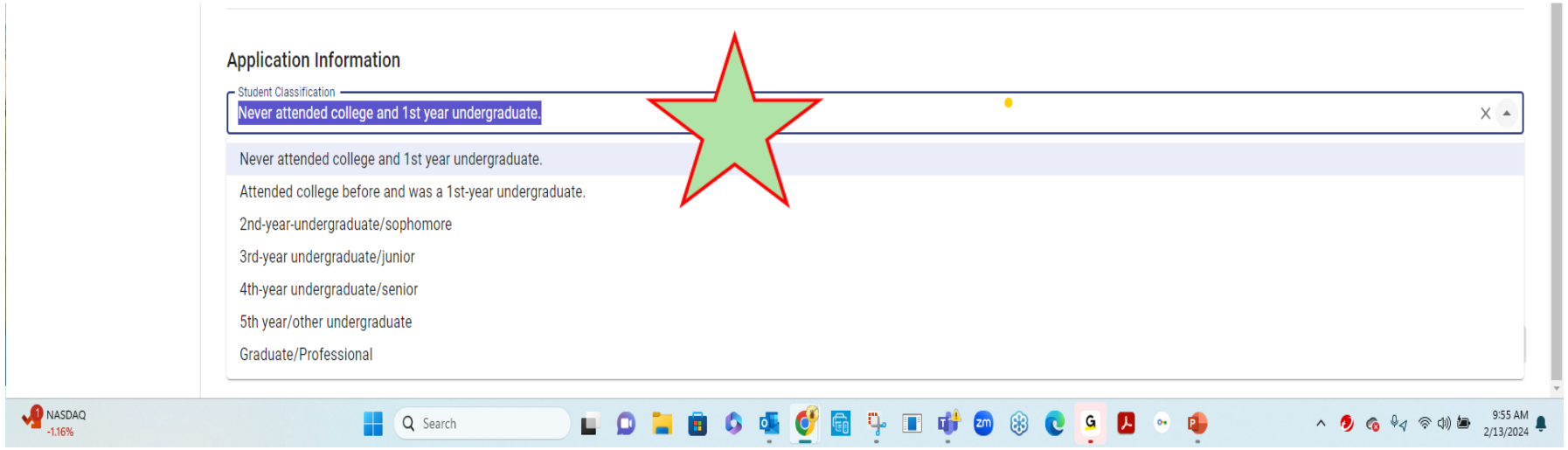
Student application process



The Student Classification mirrors the FAFSA

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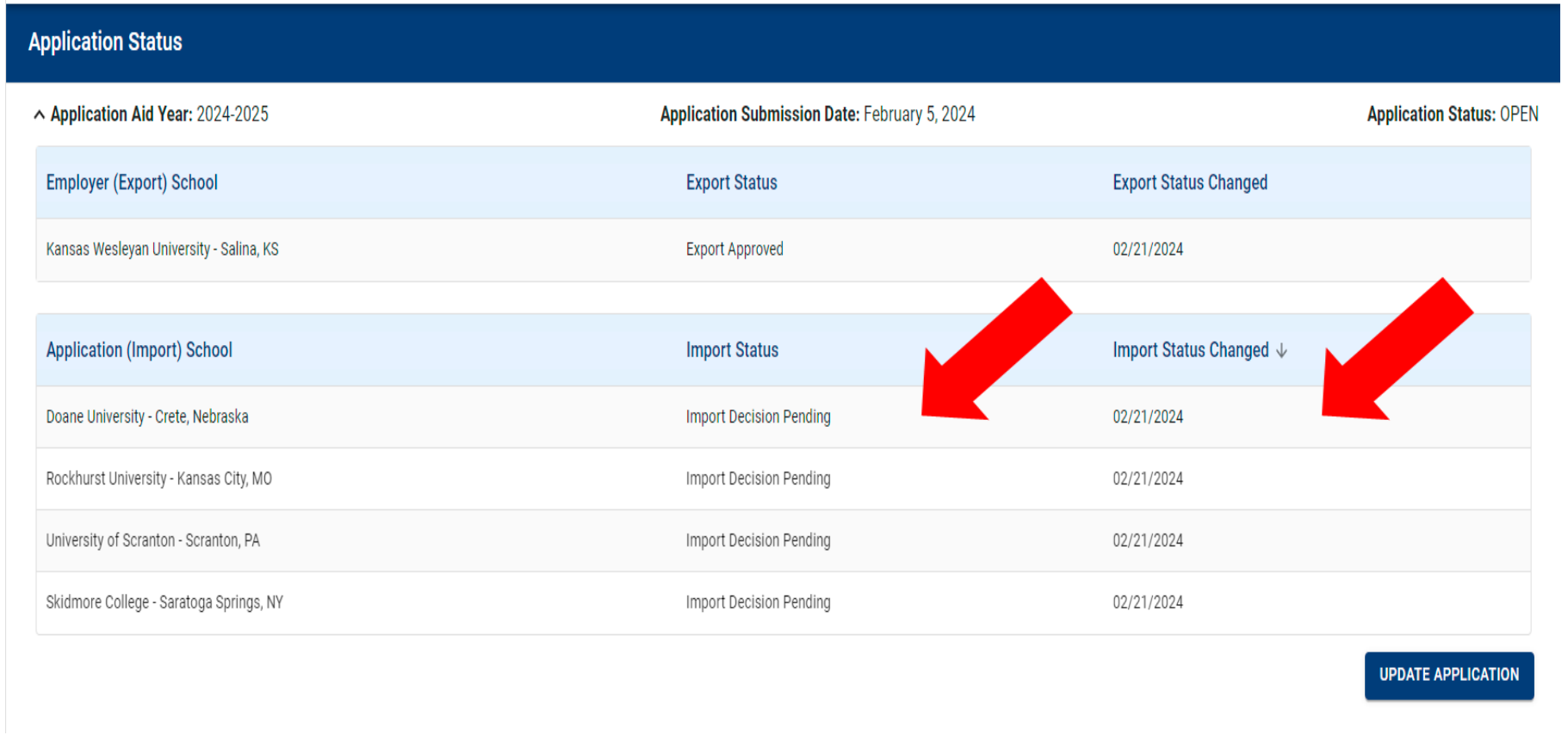
Student application process



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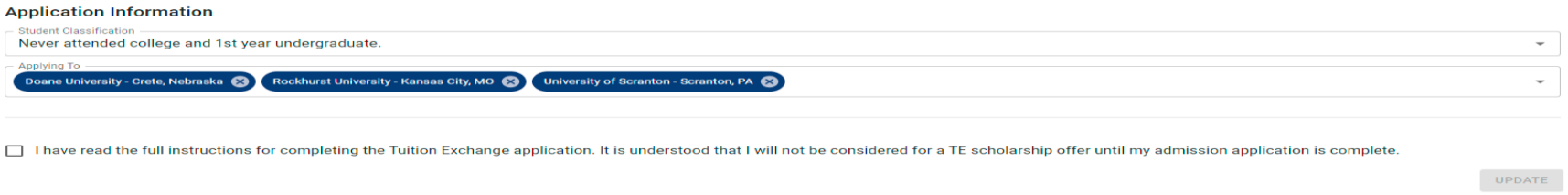
Student application process



- The student decides he is no longer interested in Skidmore
- The student opens his account, removes the college(s), and can also add additional colleges
- The maximum number of active college requests is ten (10)
- The student clicks the *"I have read the full instructions for completing the Tuition Exchange application. It is understood that I will not be considered for a TE scholarship offer until my admission application is completed"* box and then clicks Update application
- The impacted school(s) and the export school will have entries added to their Daily Digest – <u>still a work in progress</u>

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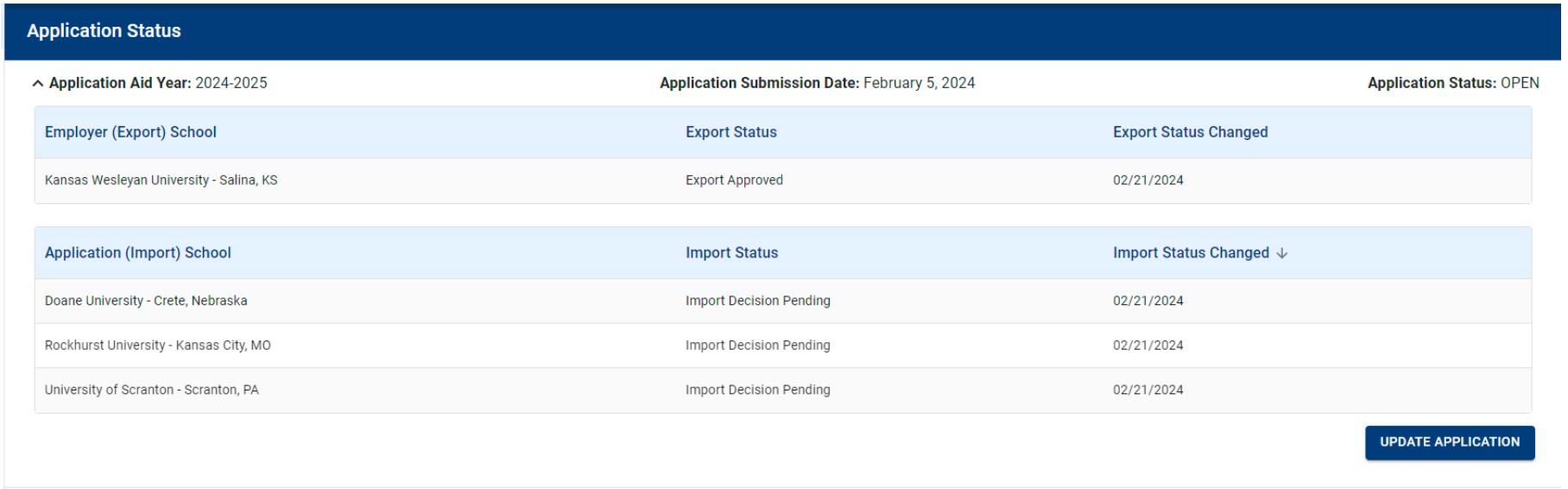
Student application process



Skidmore College is no longer an active college for the student

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Student application process

The student's Application Status updates as Import schools render decisions
The impacted Import and Export Daily Digests are updated

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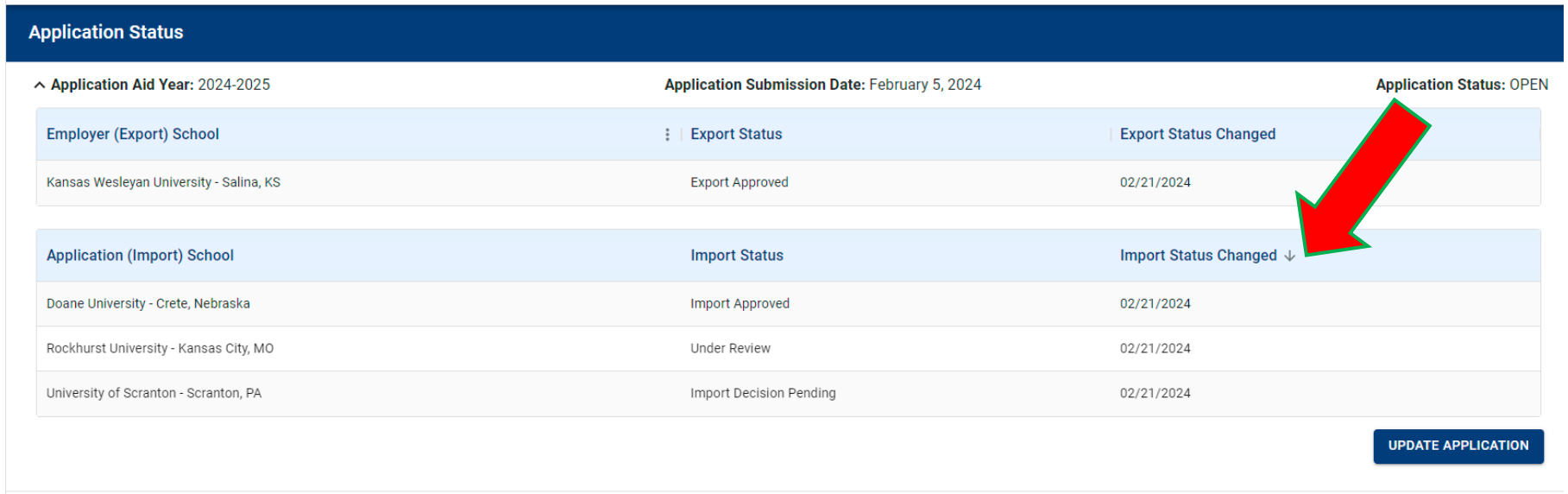
Student application process



The student status updates – notice Rockhurst updated the Import Status
The impacted Export and Import TELOs Daily Digests are updated

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Student application process

The student has a decision to make
Two schools have offered him a TE scholarship
Rockhurst shared that it is reviewing the student's record
The student could eliminate Rockhurst or wait for their response

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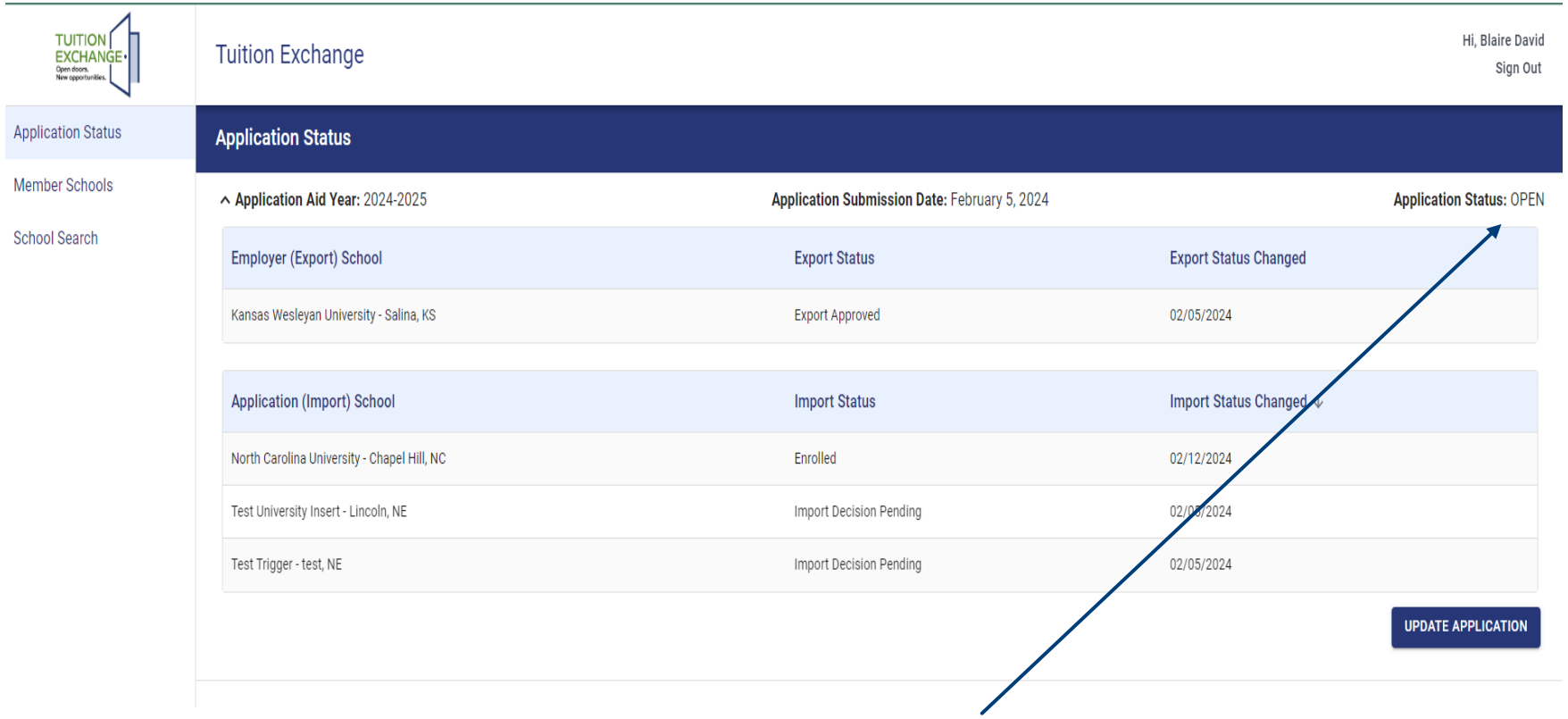

When the student's application status is OPEN, the student can modify their school choices

When an IMPORT school claims the student as ENROLLED, the student's application status updates to CLOSED

Additional CLOSED status include withdraw, transfer, and/or employee no longer eligible

No further action can occur with the student's application

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Brain Break!

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Tuition Exchange Liaison Officer (TELO) responsibilities for current system

- Use the TE-EZ Online app process
  - No more TELO app entry option
- Confirm institution information is correct by May 15, 2024
- Every TE member school must appoint a primary and secondary TELO before May 15, 2024
  - Contact Suzanne at sleance@tuitionexchange.org for assistance
- Re-certify all eligible continuing students before May 15, 2024
  - https://www.tuitionexchange.org/vnews/display.v/ART/65cd8b6e9136e
  - Thank you to the 232 schools that have completed the Re-certification process
- Take action on all 2024-2025 apps before June 1, 2024

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TELO responsibilities in new system

- TE-Central will no longer manage school system users or assign system access other than the primary TELO
- A TE calendar is in development and will be shared
  - Rules are in place to clean up the system
    - Unclaimed student apps will be closed
    - No more ADD student – when one IMPORT school claims the student all other college choices, regardless of status, move to an ineligible status
- No more system-generated emails clogging your email box
  - A Daily Digest will be available for the primary and secondary TELOs review
- No more re-certification
  - All student apps will be approved until the system calculated expiration date
    - Exception is the student who withdraws before graduation or employee eligibility issues

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TELO responsibilities

- TE Central will request your school logo soon
- The request will include a specific file type and size
- Please be prompt with your response

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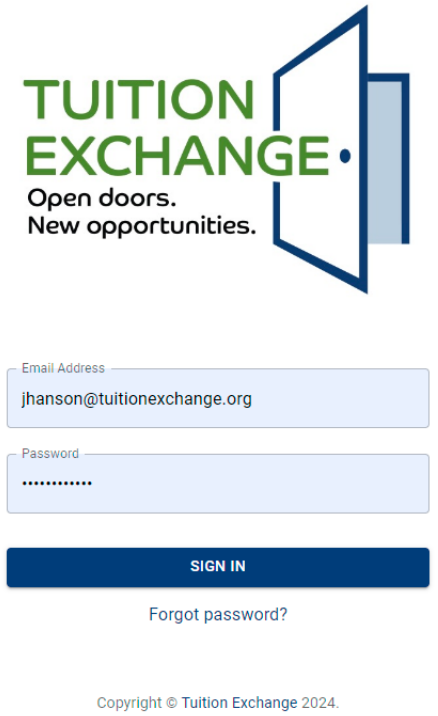
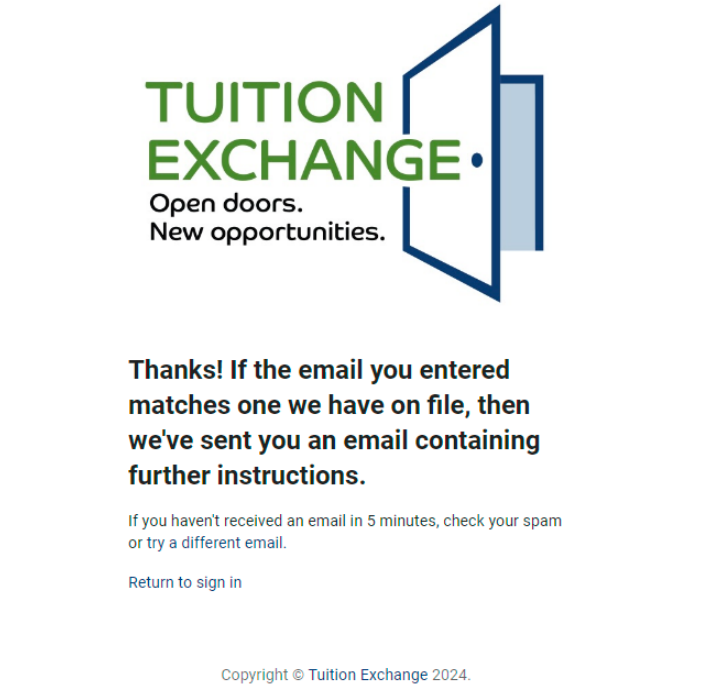
TELO responsibilities



- Primary and Secondary TELOs will receive login details via email
- The login details will include a temporary password
- Login action must occur within a defined period, or the temporary password will expire
- More information will be shared later
- Forgot password option available

TELO responsibilities



- The email comes from info@tuitionexchange.org and provides a temporary password
- Login action must occur within a defined period, or the temporary password will expire within 24 hrs
- The password requires a minimum of 12 characters

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TELO responsibilities

- The new system will be pre-populated with current school information
- The primary TELO is responsible for entering and confirming annually that the school profile is up to date and correct
- The primary TELO is responsible for adding the annual aid year school information
- The primary TELO is responsible for maintaining active system users (adding and deleting)

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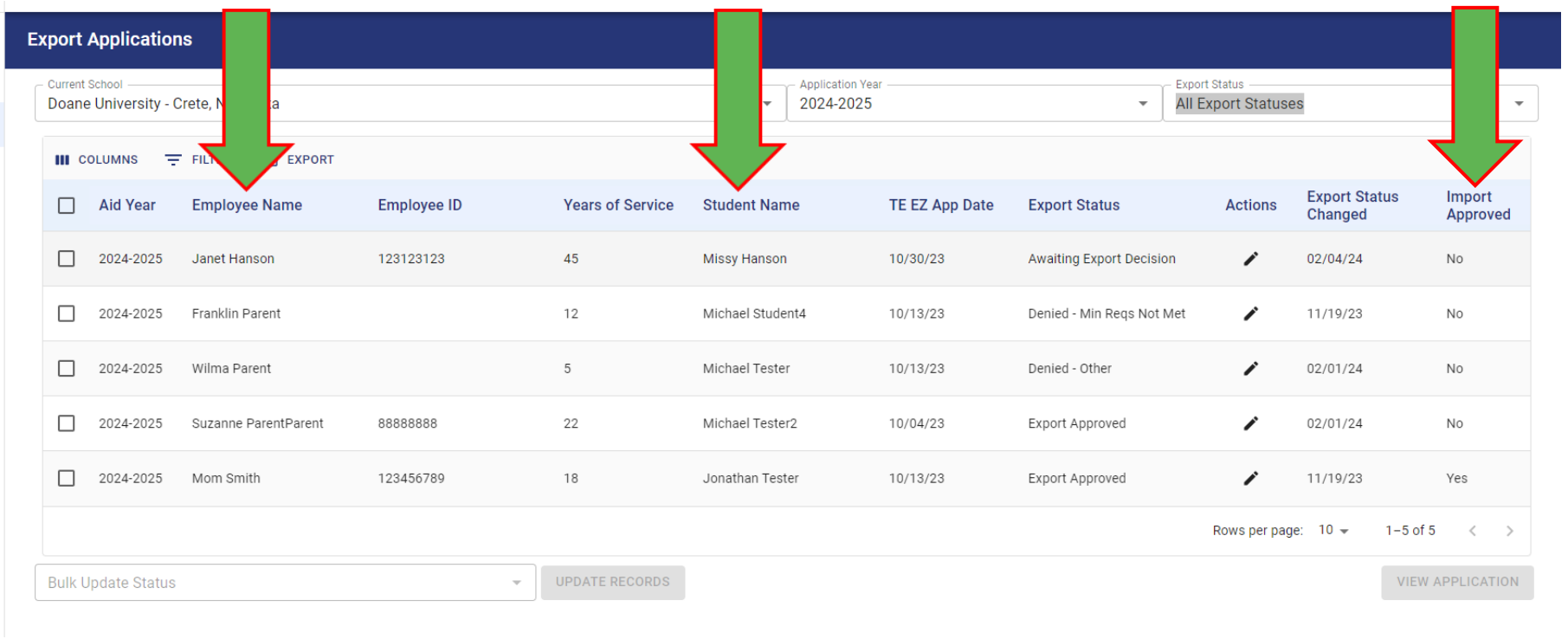
TELO Export responsibilities



Can approve individual apps or multiple apps in the same status to a new status

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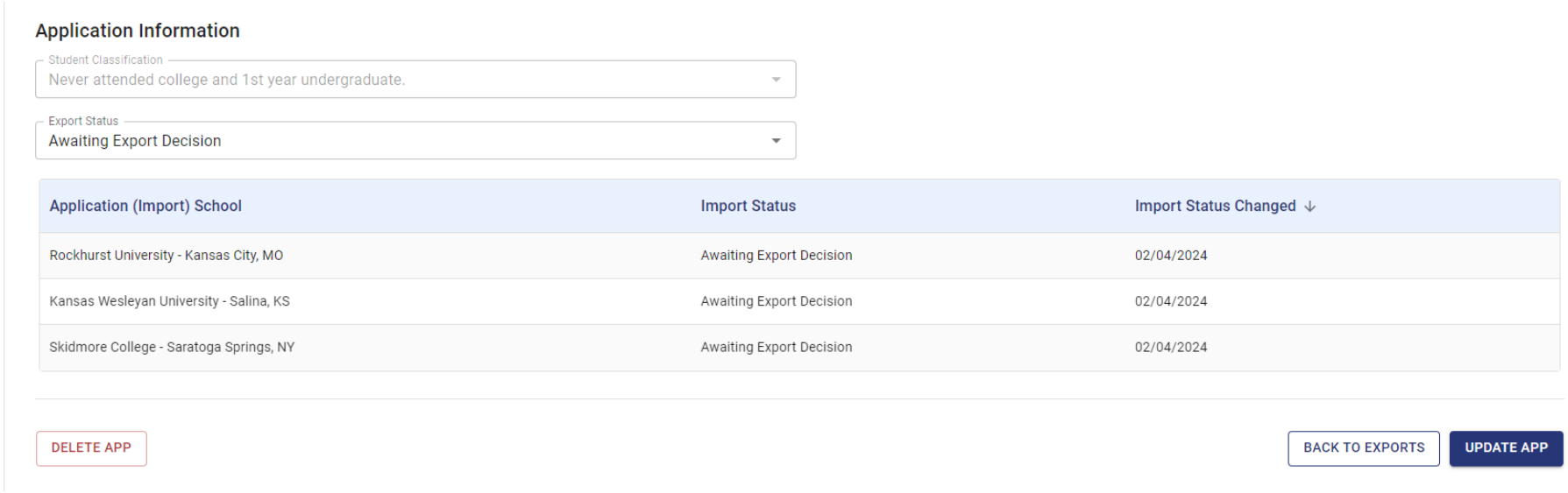
TELO Export responsibilities



Export Status options

- Awaiting Export Decision
- Export Approved
- Denied – not an employee
- Denied – minimum requirements not met
- Denied – other (reason must be provided)

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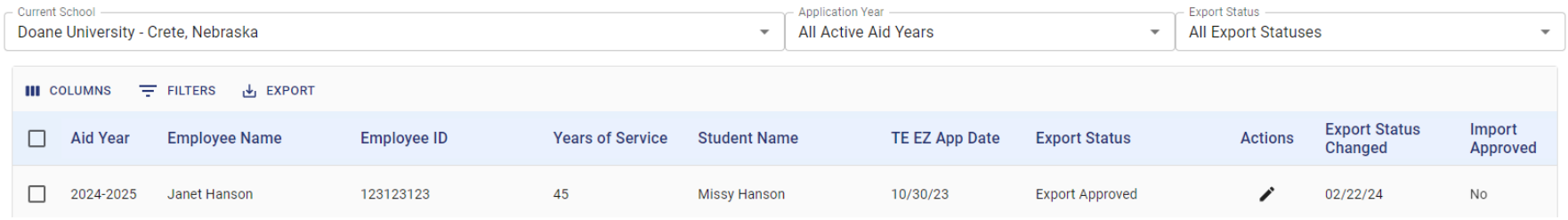
TELO Export responsibilities



Export TELOs are approving the employee's eligibility for their student to shop

Once the employee’s eligibility is confirmed, nothing more is required - unless the employee’s eligibility changes

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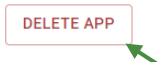
TELO Export responsibilities



Delete student application? This will remove the student application from the system. If the student has no other data, the student will also be removed. You will not be able to recover the data once complete.

Once the export decision is determined, click Update app to finalize the action

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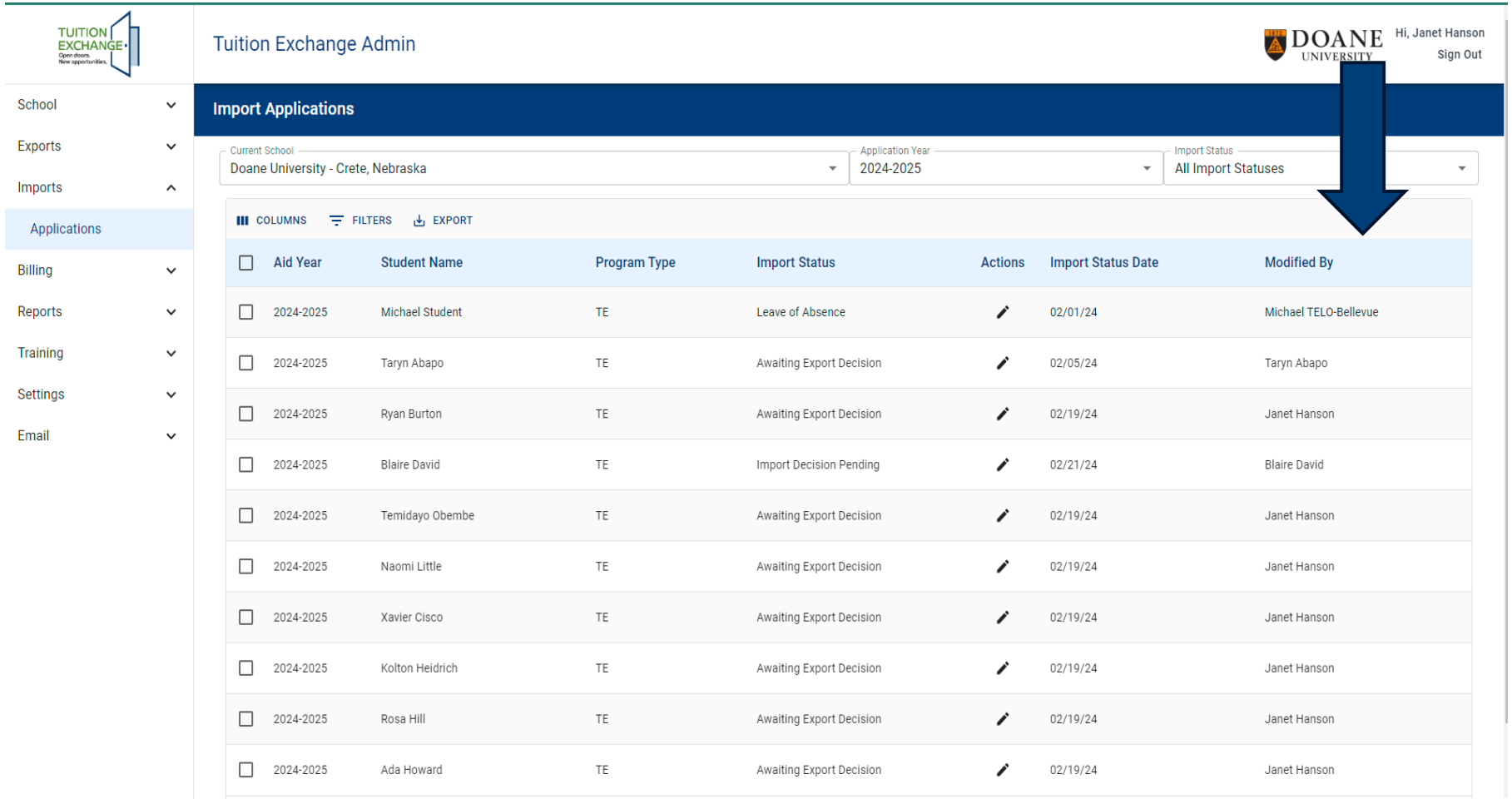
TELO Import responsibilities



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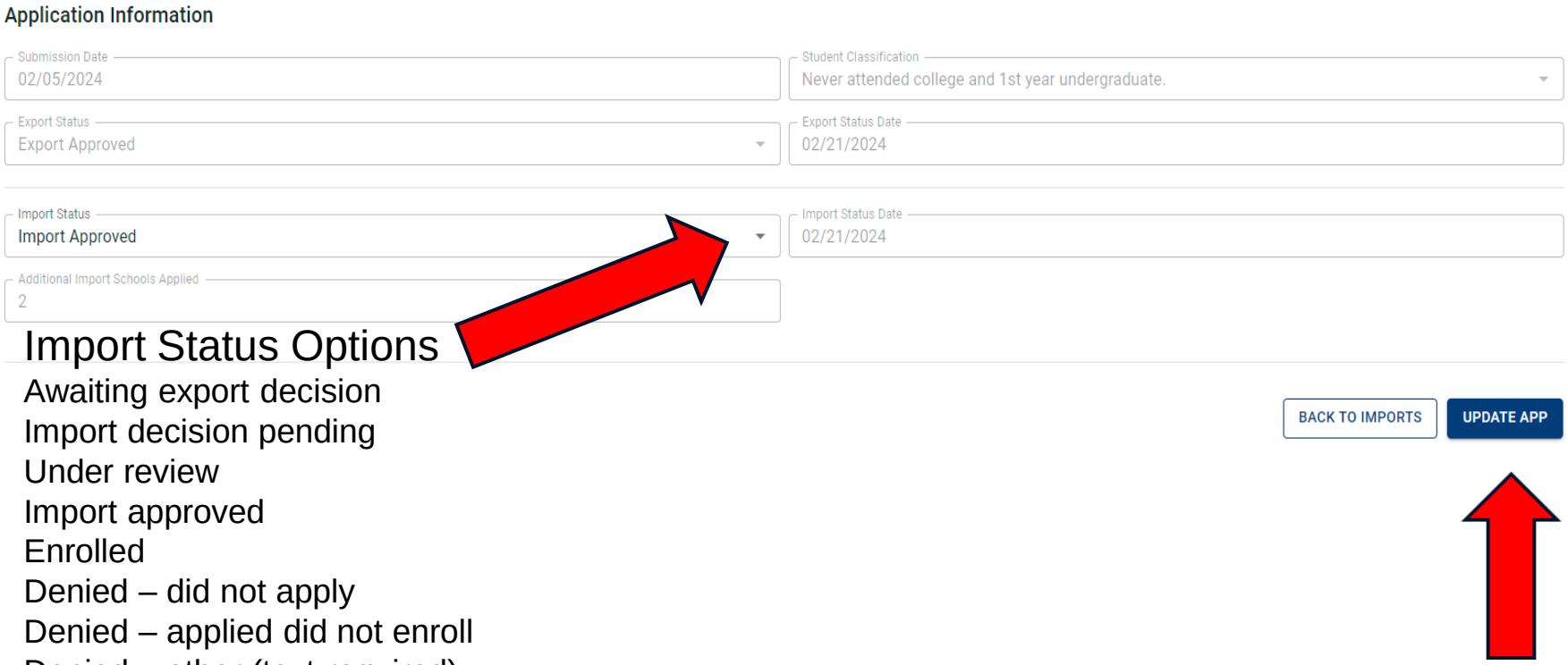
TELO Import responsibilities



Import Status Options

Awaiting export decision
Import decision pending
Under review
Import approved
Enrolled
Denied – did not apply
Denied – applied did not enroll
Denied – other (text required)
Declined – student offered but declined
Withdrawn
Leave of absence
Employee not eligible (Export option only)

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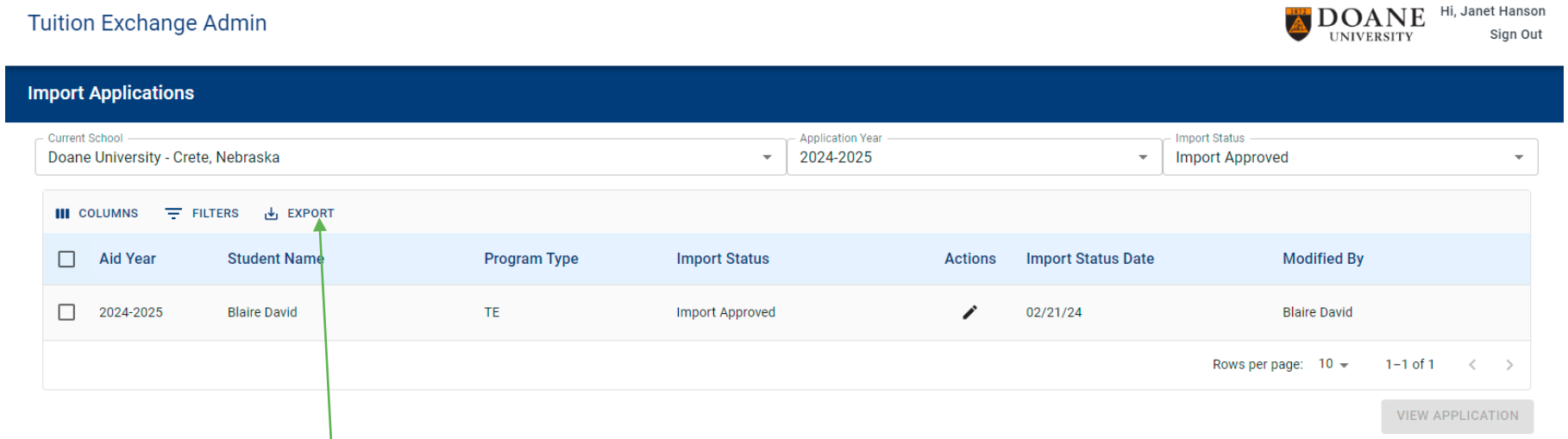
TELO Import responsibilities



Once approved, be sure to update Financial Aid so the TE scholarship can be included with the student's total financial aid package
Use the Query Report option to keep others informed

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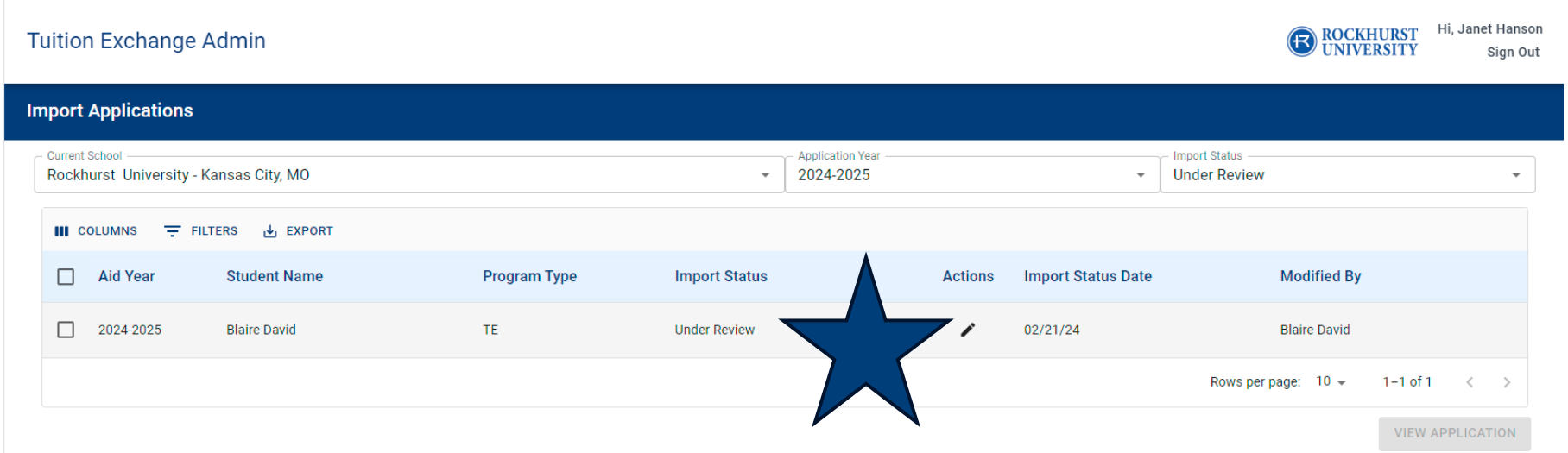
TELO Import responsibilities



Monitor and update Import status frequently
Keep Enrollment Managers, Admission Directors, and Financial Aid Officers informed via Query report options

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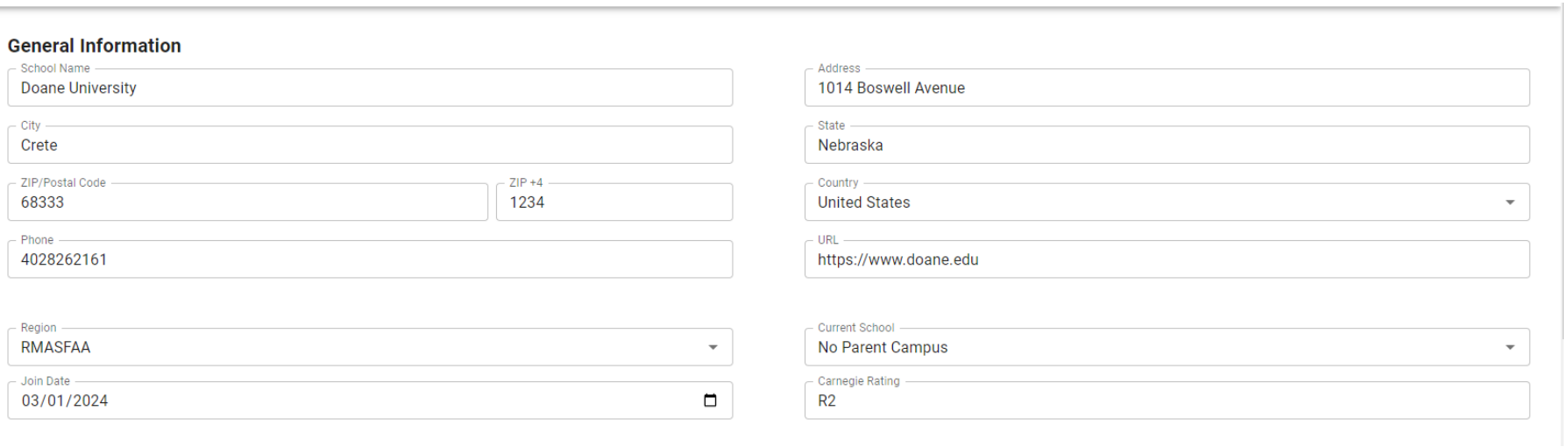
School profile details



General information will be transferred from the current system
Please review and update if incorrect before May 15

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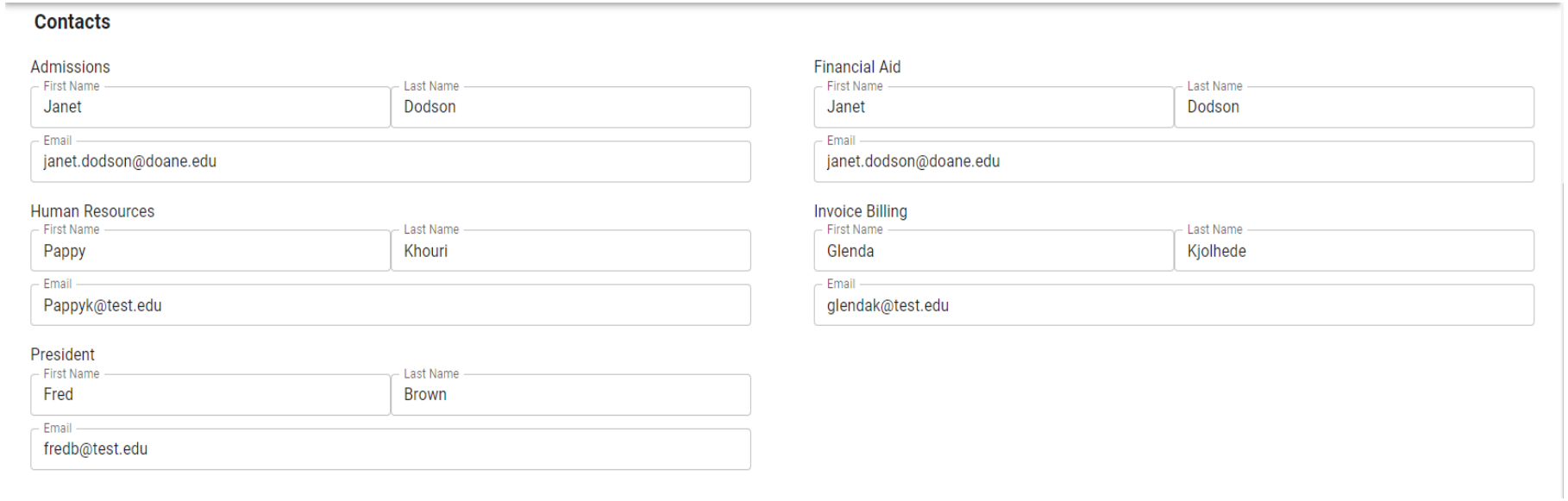
School profile details



Each contact requires a response and a valid email
The contacts will receive information pertinent to their role, with the Primary TELO included in all communication
The Invoice Billing contact will receive all payment invoice notices
In all cases, the primary and secondary TELO will be included when connecting with any of the above contacts

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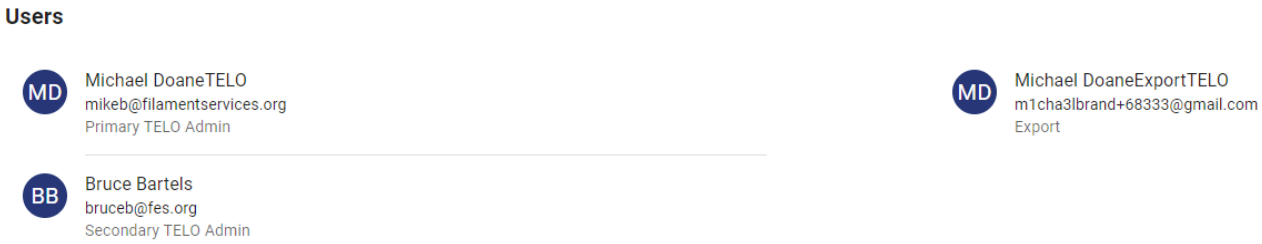
School profile details



The primary and secondary TELO, as well as others with system access, will be listed here
The primary and secondary TELO are expected to keep the system users up to date
Should the primary TELO leave, the secondary TELO can update the system
If both depart, TE Central can update the system – adding only a primary user

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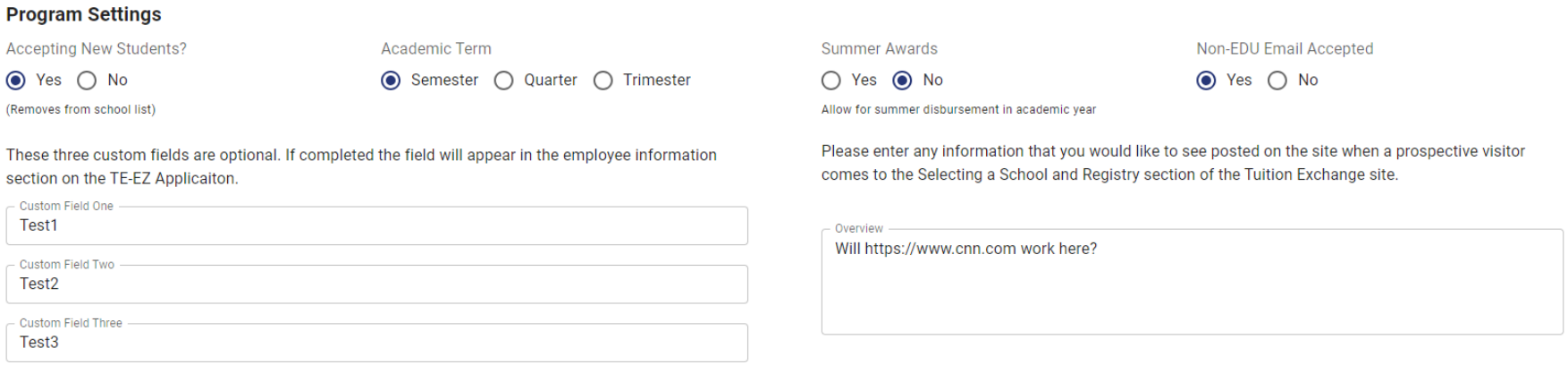
School profile details



The primary TELO must complete this information after the new system is launched
There are three custom fields the member school can use as needed
Please be aware – the information cannot be used as a sort option
The entered information powers the school search option used by families

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School profile details

- The following five (5) slides detail the annual aid year school information
- Every year is a new year
  - No more over-writing
- The primary TELO must complete the details every year
  - The member school will be greyed out until the information is complete
- Clicking update is the key saving the information

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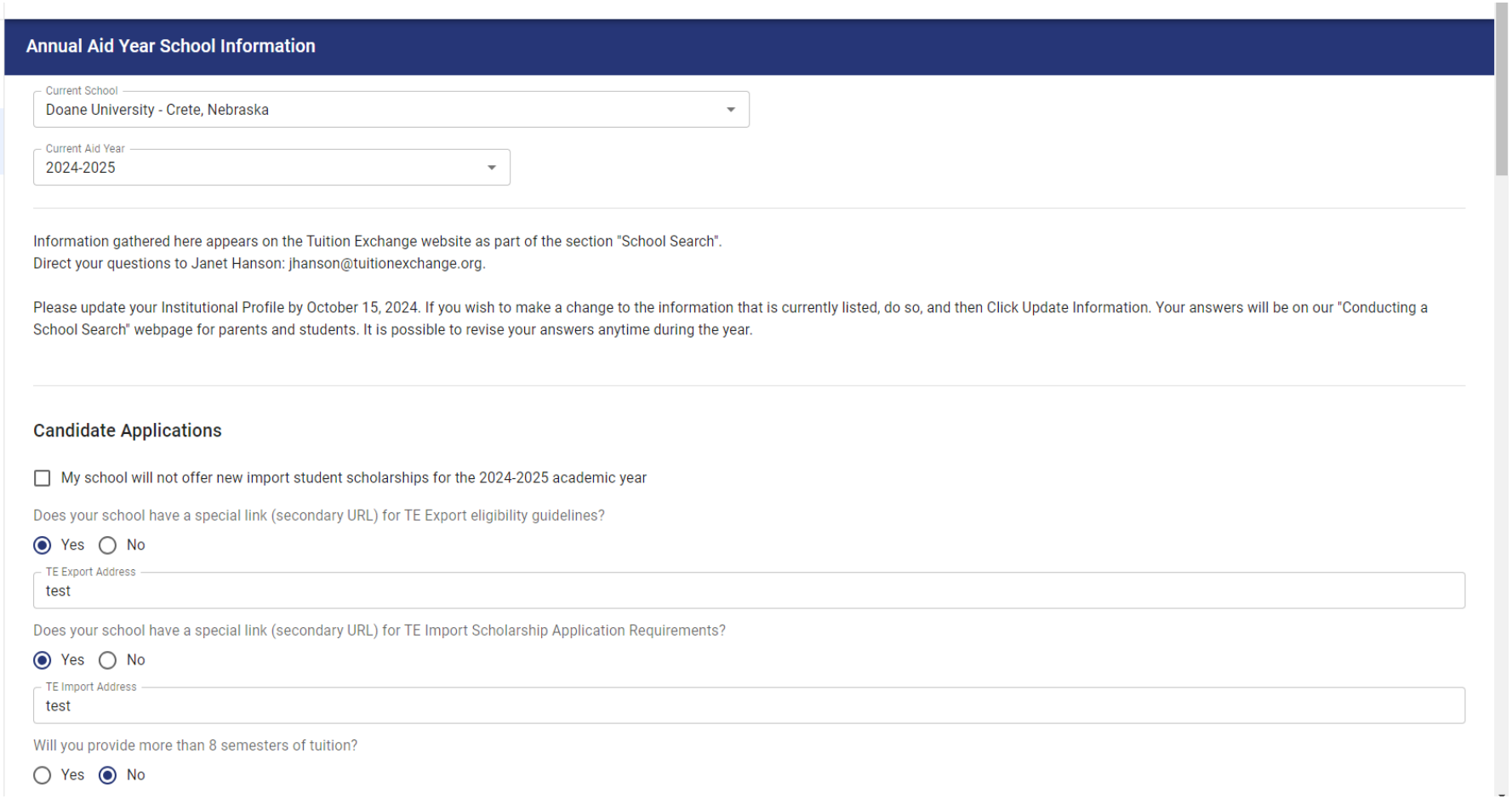
Academic year information



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Academic year information

Select all student categories your school will consider offering Tuition Exchange scholarships

- [x] Never attended college and 1st year undergraduate.
- [x] Attended college before and was a 1st-year undergraduate.
- [x] 2nd-year-undergraduate/sophomore
- [x] 3rd-year undergraduate/junior
- [x] 4th-year undergraduate/senior
- [ ] 5th year/other undergraduate
- [x] Graduate/Professional

Deadline for receipt of Export candidate applications at my school*
11/01/2023

Deadline for receipt of Import candidate applications at my school*
08/15/2024

Tuition*
$ 38940

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Academic year information

TE Scholarship Award

The Tuition Exchange scholarship offered by my school will be:

- (●) Full Tuition ($38,940.00)
- ( ) Annual Set-Rate
- ( ) Public Institution Rate
- ( ) Other

All TE scholars must complete the Free Application for Federal Student Aid (FAFSA)

- (●) Annually
- ( ) Not required

Some states provide portable tuition assistance grants. Check out your home state by clicking here

- [x] If the student is Pell eligible, the grant is included as a part of the TE scholarship award
- [x] If the student is eligible for a State Grant, the grant is included as a part of the TE scholarship award
- [x] Academic scholarships are included as a part of the TE scholarship award
- [x] Talent scholarships, such as Art, Music, or Theatre, are included as a part of the TE scholarship award
- [ ] Outside scholarships are included as a part of the TE scholarship award
- [ ] Tuition Exchange scholars are required to live on campus

Percentage of Award Offers
more than 50% who are admitted were offered the TE scholarship %

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Academic year information

Eligible Academic Programs

Import Tuition Exchange scholarships are available for the following programs offered by my school:

- [ ] All undergraduate programs
- [x] All undergraduate programs except
- [ ] Off campus/study abroad semester
- [ ] All Online programs
- [ ] All Online programs except
- [ ] All Certificate programs
- [ ] All Certificate programs except
- [ ] Master's degrees
- [ ] Doctoral degrees

Undergraduate program exceptions

Available on the Crete campus only, the 3 + 2 program are only eligible while attending classes in Crete.

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Academic year information

Export Enrollment Fee

These would be fees charged to employees (exports) to enroll to other institutions.

My school charges every EXPORT applicant to apply for and potentially receive a Tuition Exchange Scholarship to enroll at any TE member school.

○ Yes ◉ No

My school charges every EXPORT student enrolling at any TE member school with a Tuition Exchange Scholarship award.

○ Yes ◉ No

Import Enrollment Fee

These would be fees charged to students (imports) to enroll to your institution.

My school charges every enrolled IMPORT applicant a TE processing fee.

○ Yes ◉ No

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Brain Break

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Reports

- Static reports
  - Pre-determined and push button ready
- Export **
- Import **
- Enrollment **
- Tuition **

** Static and Query options available

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Reports

- TELO determines the application year and export status
- TELO can export (download as CSV) as displayed
- TELO can start with this report and filter via Basic logic and download it as a CSV
- TELO can upload to school systems – contact your school IT staff for upload assistance

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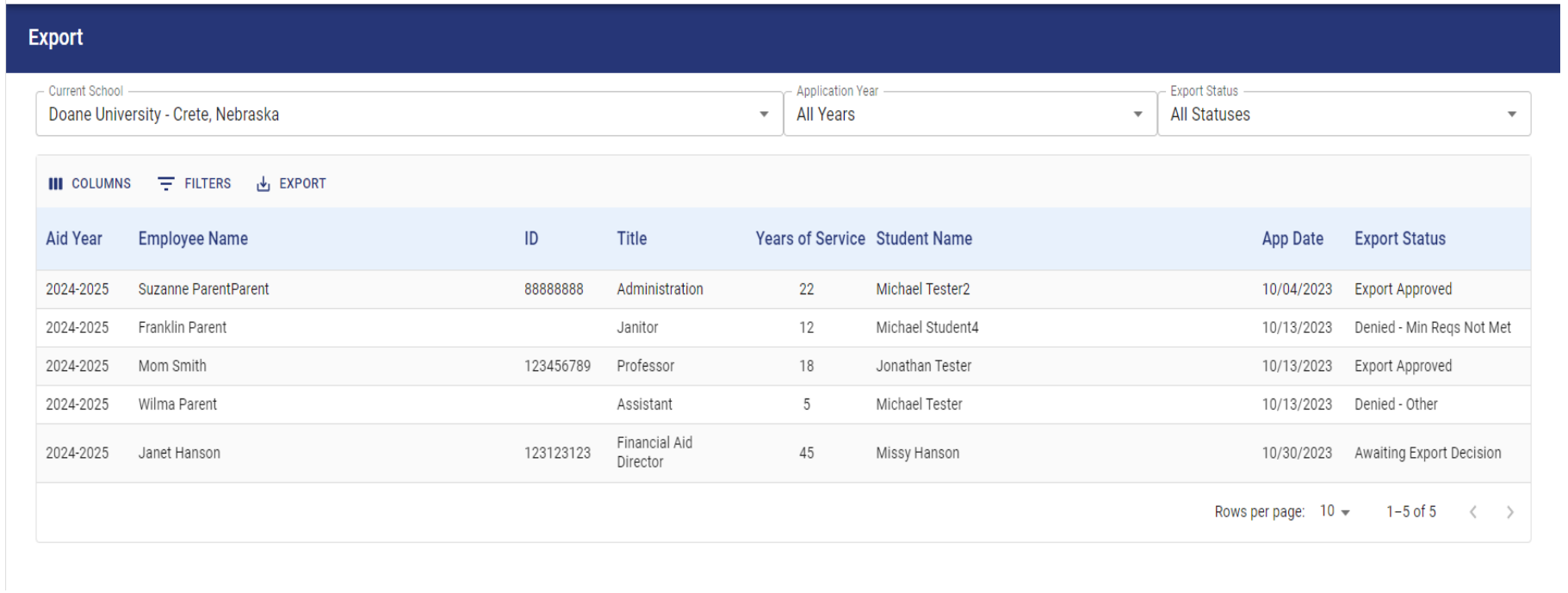
New opportunities.

Reports - static



TUITION EXCHANGE
Open doors.
New opportunities.

Reports - static

Import

Current School: Doane University - Crete, Nebraska | Application Year: All Years | Import Status: All Statuses

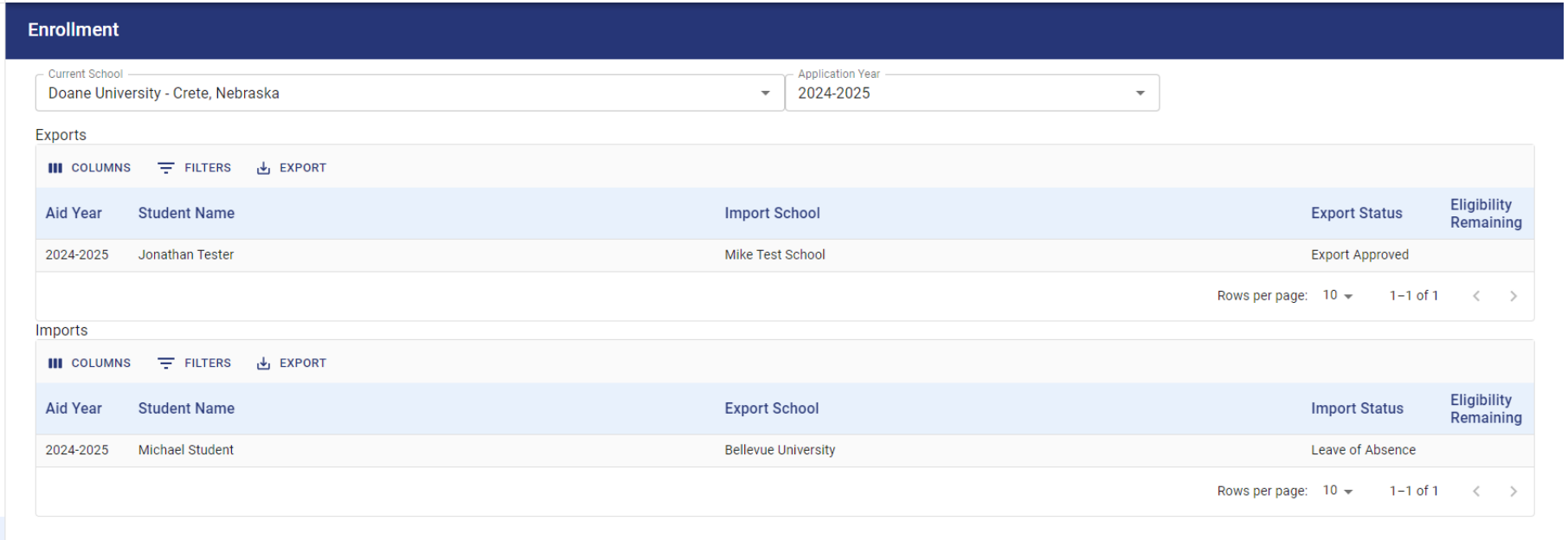
COLUMNS FILTERS EXPORT

Aid Year	Student Name	Address	City	State	ZIP	Email	Cell Phone	Import Status
2023-2024	Michael Tester19	1515 State Street	Lincoln	NE	68508	m1cha3lbrand+111923@gmail.com	(402) 555-1212	Withdrawn
2024-2025	Michael Student	1300 O Street	Lincoln	NE	68508	m1cha3lbrand@gmail.com	(402) 555-1212	Leave of Absence
2024-2025	Sally Student	1212 Oak Street	Omaha	NE	68502	m1cha3lbrand+1119232@gmail.com	(402) 555-5555	Withdrawn
2024-2025	Taryn Abapo	6699 Summerstone Ct	Rancho Cucamonga	CA	91701	sleance1+Taryn@gmail.com	(123) 456-7890	Awaiting Export Decision
2024-2025	Ryan Burton	7958 N 164th St	Bennington	NE	68007	jkhd76+Ryan@gmail.com	(123) 456-7890	Awaiting Export Decision
2024-2025	Blaire David	2673 Park Place Dr	Fremont	NE	68025	jkhd76+Blaire@gmail.com	(123) 456-7890	Import Approved
2024-2025	Temidayo Obembe	6709 Elmhurst Dr	Ommaha	NE	67114	jkhd76+Temidayo@gmail.com	(123) 456-7890	Awaiting Export Decision
2024-2025	Naomi Little	125 Ormsby St	Pewaukee	MO	01581	jkhd76+naomi@gmail.com	(123) 456-7890	Awaiting Export Decision
2024-2025	Xavier Cisco	7210 Steven Lane	Indianapolis	IN	46260	jkhd76+Xavier@gmail.com	(123) 456-7890	Awaiting Export Decision
2024-2025	Kolton Heidrich	7210 Steven Lane	Grass Lake	MI	49240	jkhd76+Kolton@gmail.com	(123) 456-7890	Awaiting Export Decision
2024-2025	Rosa Hill	8652 Wood Forest	San Antonio	TX	78251	jkhd76+rosa@gmail.com	(123) 456-7890	Awaiting Export Decision
2024-2025	Ada Howard	1135 Middleburt Road	Kent	OH	44240	jkhd76+ada@gmail.com	(152) 345-6789	Awaiting Export Decision
2024-2025	Christian Fontaine	34585 Bunker Hill	Farmington Hills	MI	20814	jkhd76+christian@gmail.com	(123) 456-7890	Awaiting Export Decision
2024-2025	Grace Bailey	3702 150th	Urbandale	IA	50323	jkhd76+Grace@gmail.com	(123) 456-7890	Employee not eligible
2024-2025	Aaron Biden	4320 Coolridge Ave	St. Louis	MO	68112	jkhd76+aaron@gmail.com	(123) 456-7890	Awaiting Export Decision
2024-2025	Buisan Twomey Santiago	3642 15th St. S.	Moorhead	MN	56560	jkhd76+Santiago@gmail.com	(123) 456-7890	Awaiting Export Decision

Student birthdate will be added to this report

TUITION EXCHANGE
Open doors.
New opportunities.

Enrollment Report - static



TUITION EXCHANGE
Open doors.
New opportunities.

Reports - tuition

Tuition

Current School: All Schools | Application Year: All Years

COLUMNS | FILTERS | EXPORT

Aid Year	School Name	City	State	Tuition	Award Amount	Award Type
2022-2023	University of Colorado	Boulder	CO			Full Tuition
2022-2023	Test DB1	Sterling	NE			Full Tuition
2022-2023	Doane University	Crete	Nebraska			Full Tuition
2022-2023	University of Omaha	Omaha	NE			Full Tuition
2023-2024	University of Colorado	Boulder	CO			Full Tuition
2023-2024	University of Scranton	Scranton	PA			Full Tuition
2023-2024	Mike Test School	Lincoln	NE			Full Tuition
2023-2024	Skidmore College	Saratoga Springs	NY			Annual Set-Rate
2024-2025	Doane University	Crete	Nebraska	$38,940	$38,940	Full Tuition
2024-2025	Kansas Wesleyan University	Salina	KS			Full Tuition

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You asked for it – and finally it's available

TUITION EXCHANGE
Open doors.
New opportunities.

Invoices
Costs and Set-Rate

- 2024-2025 Tuition Exchange Member Dues are $600.00 and are due July 15
- Participation Fees (p-fees) $50.00 per successful Export are due October 15
- Set Rate
  - 2024-25 $42,000
  - 2025-25 $43,000
- All invoices will be emailed to the primary, secondary, and invoice contact listed in the system

TUITION EXCHANGE
Open doors.
New opportunities.

Invoice – membership dues and participation fees

- Membership dues
  - Email invoices no later than July 1
  - Invoice number now standard
- Participation Fees
  - Email invoices after October 15
  - Invoice number now standard
- Outstanding dues and fee reminders will be sent
  - Late fees will be charged (the calendar will provide the details)
- Checks and Credit Card payments accepted
  - ACH is no longer a payment option
    - Janet notified the schools which used ACH in the past

TUITION EXCHANGE
Open doors.
New opportunities.

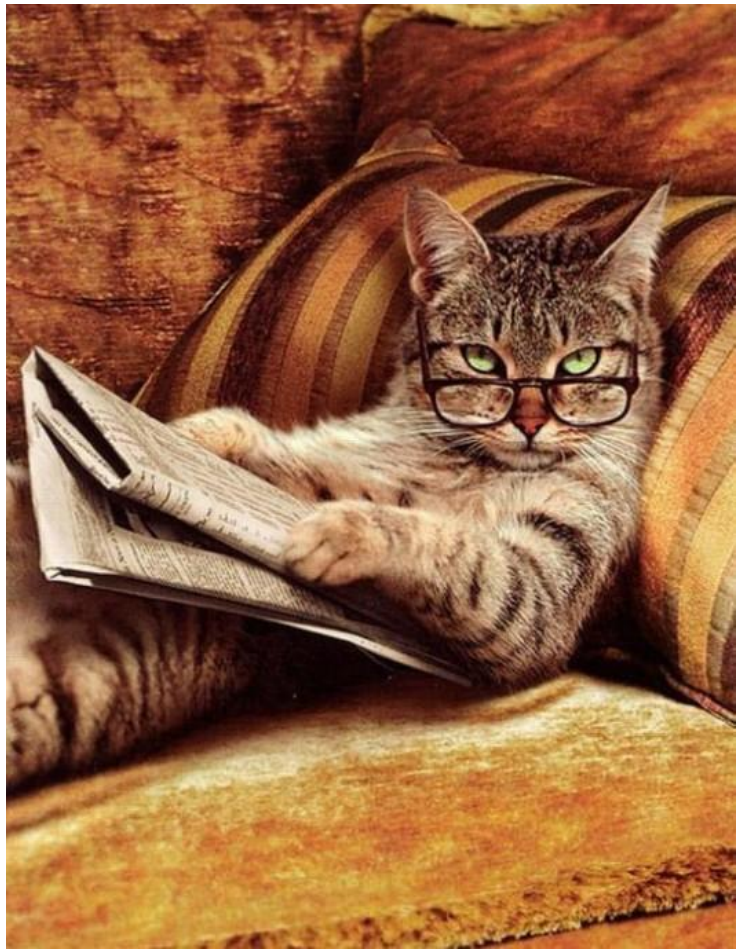
Reports - query

- Basic Logic is the key to creating query reports
- Additional information will be shared after the new system is launched
- Stay tuned for more information

TUITION EXCHANGE
Open doors.
New opportunities.

What's Next?

- Current system clean-up
- Timeline



Be like Missy Cat – always curious and learning

TUITION EXCHANGE
Open doors.
New opportunities.

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Current system clean-up

- Current system clean-up
  - General information will be transferred from the current system
  - Please review and update if wrong before May 15
- Re-certify all eligible continuing students before May 15, 2024
  - https://www.tuitionexchange.org/vnews/display.v/ART/65cd8b6e9136e
  - Thank you to the 232 schools that have completed the Re-certification process
- Take action on all 2024-2025 apps before June 1, 2024
  - Import schools - Approve or Deny/Reject
  - Export schools - Withdraw

TUITION EXCHANGE
Open doors.
New opportunities.

Timeline

- A full data transfer will occur no later than June 21
- The current TE system will be unavailable for one whole work week in June – TBD
- The 2025-2026 application process opens with the new system on or around July 1, 2024
- Future items under consideration
  - Enrollment Reports and Membership Agreements will be linked PDFs available in the system
  - Multi-factor authentication

TUITION EXCHANGE
Open doors.
New opportunities.

Training

- Required training
  - The new system will require every primary and secondary training to participate in a live session
  - Many options will be provided, and every TELO must attend at least one session
- Training will be conducted inside the system
  - This means you should have immediate access after completing the minimum established attendance requirement – TBD
- The TE Central staff are very excited about the new system
- Changes are coming, and they put the primary and secondary TELO in the driver's seat
- Patience will be the key to success

TUITION EXCHANGE
Open doors.
New opportunities.

Let’s Recap

- Student account process
  - Creating a student account
  - FERPA consent
- Student application process
- Tuition Exchange Liaison Officer (TELO) responsibilities
- School profile details
- Academic year information
- Reports
  - Static Reports
  - Query Reports
- What’s Next
  - Current system clean-up
  - Training

TUITION EXCHANGE
Open doors.
New opportunities.

TUITION EXCHANGE
Open doors.
New opportunities.