**TE Central 103 Verbatim Transcript**

Well, hello, friends, this is Janet, and this is the third in a series of four, who wish an Exchange Liaison Officer, Webinars, and this webinar focuses on the T lo duties.

0:37

As I mentioned, this is the third of four.

0:42

They're all available on demand, and they are an excellent resource for both new and seasoned telus.

0:50

One-on-one describes T low basics, 102 helps you to better understand the website, as well as the tea, easy online application.

1:06

Today we're going to explore guidelines, expectations and employ eligibility issues. And 104 speaks to TILA monthly training which is different than this one or the mandatory reporting as well as reviewing frequently asked questions by you that shilo.

1:31

Today's focus is tuition exchange guidelines, what's in yours, the expectations of both the import and the export ....

1:42

And please remember, most of the time, we're both and we will wrap it up with employee eligibility issues.

1:53

In your guidelines, you need to define the program and its location.

2:03

Many of us, today, have, a variety of campus locations: Is tuition exchange available on all of those?

2:12

And, what about academic programs?

2:15

Can I get a, can I take a class, an underwater basket weaving and receive tuition, exchange?

2:25

Employees and their dependents?

2:27

What program limitations do you have in place?

2:31

Does the, can the employee start today and receive tuition exchange eligibility today?

2:38

And who, who is eligible for tuition exchange as an export or import on your campus dependent children only or others such as the employ and or the employee's spouse or registered domestic partner and how does that work, our employees in Forbes?

3:01

What's the application process for the export employ as well as the import import?

3:10

Let's talk about program, inclusions, undergraduate programs.

3:17

Yes, Degree completion programs, perhaps, Certificate programs.

3:24

If financial aid federal financial aid is available for certificate programs, you're encouraged to consider certificate programs within your eligible Program Inclusion List, graduate programs.

3:40

Professional degree programs, tuition exchange, leaves it up to you, the school, to define what every school needs to address, each of the issues that we're talking about today.

3:56

Locations, main campus only, branch campuses. What about online?

4:02

Some schools are just online programs only.

4:06

And so obviously, their location is wherever the student lives, make sure that you are addressing all of those issues as either yes, it's available, or no, It's not.

4:18

But don't let the employ assume that every program and every location is eligible.

4:31

Your guidelines need to define who is an eligible employee.

4:37

Do they have to work full-time?

4:39

Can they work less than full-time?

4:42

What about adjunct faculty?

4:45

What about contract labor, or fixed term employees?

4:50

Both of those, generally, our roof are talking about perhaps, folks in your fiscal plant, food service, and goodness, we're finding more and more HR departments are being contracted out. student employees.

5:08

We always have a few student employees that try to push the envelope, make sure you talk about that as well, and then retired, deceased, and even others not listed above because they will show up and ask the question.

5:28

Have you defined who an eligible dependent is?

5:31

Obviously, most of us think as of dependence, as being a biological child, stepchildren or adopted children.

5:42

Tuition exchange encouraged encourages you to consider the employ, as well as the employee's spouse and registered domestic partner if applicable.

5:57

Student expectations.

6:00

They should be enrolled full-time.

6:03

They need to be degree seeking.

6:06

If they're an undergraduate.

6:08

It's generally eight semesters or graduation, whichever comes first.

6:13

If their graduates are seeking a terminal or professional degree, such as an MBA, degree and fine arts, or perhaps a juris doctorate for semesters or graduation, whichever comes first is the rule of thumb.

6:33

Other student enrollment considerations.

6:36

If students want to enroll less than full-time, and you don't have a statement that says you must be full-time, then obviously, you're saying yes to that, please recognize that there is no T semester proration.

6:55

And you would also want to reduce the monetary amount of the scholarship to cover only tuition.

7:05

Transfer students, more and more students are bringing college hours with them.

7:10

So make sure that that student is a true freshman, when they enter your institution, or if they're a transfer.

7:17

How many hours did they bring with leave of absence or friends? Leave of absence is a term that many students use arbitrarily.

7:29

A leave of absence is a very formal process that starts with the registrar, the student leaves campus, and does not attend any other institution during his or her leave.

7:44

And when the student comes back one semester later, everything goes back into play.

7:51

If the student leaves your campus, then later shows back up. That's not a leave of absence, that student left, and now is seeking support.

8:02

Again, in those instances, the student must begin with their export school to complete a new application. Too many things change between the time the student was enrolled, left, and now is back.

8:21

What are your maintenance requirements for maintaining the Tuition Exchange Award? It's an awful lot of money to not have any GPA or hours erd requirements.

8:33

The folks in the Financial Aid Office and the Registrar's Office can help you determine what's the best policy for you.

8:42

If a student is required to take a co-op, an internship, do student teaching or studying abroad, you need to speak to those issues.

8:51

So there's no confusion about Do I, do I qualify for tuition exchange during those times, or do I not? More and more students think Christian Exchange just lasts as long as they do.

9:06

If a student chooses to take summer school, most schools say no. To tuition aid or to tuition scholarships in the Summer.

9:17

But if you say yes or are silent, remember, you're only funding to wishon. The student is using a full semester of eligibility and there's no proration.

9:32

You also need to define the process.

9:35

Remember, E is for employees or exports, I is for incoming students, and in this particular case, one of the smartest things that you can do is work with HR for your exports and work with admissions, financial aid for your imports.

10:01

When talking with employees and, or families, be sure in every conversation, to not use the term employed benefit.

10:14

Tuition exchange is a competitive scholarship at most of our schools.

10:21

An employed benefit implies a guarantee, but there are no guarantees with tuition exchange.

10:29

If the employee is deemed eligible, the student still has to be offered a tuition exchange scholarship.

10:41

Those go hand in hand, but not necessarily occur in all cases. So, it is a two pronged eligibility process. First, the employee meets the export school requirements and then the student can apply for admission, as well as the Tuition Exchange scholarship.

11:05

And if the student meets the import school deadlines, he or she may be offered a scholarship.

11:16

Within your guidelines, you need to explain how employes gane eligibility, is it through years of service.

11:24

Employment status, think hard about that one, First, come, first serve, or the date of the application.

11:33

All schools should implement some type of export application deadline.

11:39

All schools should keep their employees informed, But please remember that not all employees have, or read e-mail.

11:47

For example, in the physical plant, they may not, they may have it, but they're not given time on the job to read it.

11:55

And as a reminder, we all believe that our own situation is unique.

12:02

Mitigating circumstances is a key to every good policy and procedure manual, but you also need to make sure that you are reviewing, on a case, by case basis with documentation that supports the employee's plea. And remind folks in whatever decision you deliver to them.

12:29

And it should be in writing that that decision is final and not appealable. In other words, I can't keep climbing until somebody else gives me the answer.

12:38

I'm looking for, remind every T student applicant that in order to be considered for the process and ultimately funded, the student must complete the admission process at the input school.

12:59

Imports, as you move through the semester or the awarding timeframes.

13:06

It is crucial that you keep admissions and financial aid offices informed as new applications arrive.

13:16

Explain how import students are approved, consider an import application, priority date, as well.

13:26

Keep everybody in the know.

13:29

And, again, there's that magic issue of mitigating circumstances.

13:39

For continuing employes, as long as they stay at the same place of employment, and their students stays at the same school, life is simple.

13:52

All you do in February on the enrollment report, when we remind you, is to recertify that depicted.

14:01

But there's a whole bunch of other situations. Employees who resign, lose their eligibility at the end of the semester or the beginning of the next enrollment period. For example, this is August.

14:13

If an employee resigns today, the new academic enrollment period has not yet begun, that's that parent that parent and student will not be eligible for tuition exchange beginning in the fall.

14:31

Please be sure that you stay on top of all of that.

14:35

When a employee retires, what is your policy? That depends on your policy.

14:43

Thus, the reason for having guidelines, the same thing is true of a reduction in force or a layoff.

14:52

What are you going to do as an institution in those situations?

14:57

And if a member of yore faculty or staff dise fall employed, we're finds themselves on long term disability sleaze.

15:11

We encourage you to continue maintaining tea eligibility.

15:17

Tuition Exchange has created A memo of understanding.

15:24

That is found under the Training Calendar option.

15:28

And you are encouraged to download it and read it.

15:33

You can implement it, you can take pieces of it. I am not a lawyer.

15:38

And so I would make sure that before you ask an employee to sign something like this, that you pass it by your own legal counsel to determine that it meets the categories most important to your institution.

15:52

But at least it gives you an outline of things to consider while chin's consider, while you are working with an employe for that is no longer employed for whatever reason.

16:09

Like new students, continuing students need guidelines for the renewal process.

16:15

What's your enrollment requirement? Generally, it's full-time.

16:19

Please note: you need to consider overload charges as well as required lessons. In most cases, those are outside the normal tuition, and schools do not cover those, but you need to figure that out.

16:36

What's the length of time?

16:38

As I shared earlier, generally, it's eight semesters or graduation, whichever comes first.

16:45

For the undergraduate or for the graduate student, it's generally four semesters or graduation, whichever comes first.

16:54

Maintenance requirements, you need to publish those. And you also need to explain what happens if I do not meet the maintenance requirements of the institution.

17:07

Working and communicating with the Financial Aid Office, as well as the Registrar's Office is a must in every one of these situations.

17:17

And, as always, learn how to spell mitigating and keep it handy.

17:25

You need to provide the explanations for families who are asking for you to make some kind of decision that is outside the norm.

17:40

Where do you publish?

17:42

Your guidelines: They should be in your employee handbook, they should be in your college catalog, and they should be in the student handbook as they relate to each one of those categories.

17:54

How do you make sure that export, families understand the programs?

17:59

Employee handbook?

18:01

Perhaps you have an employed gateway of some sort.

18:04

You can always create a Memo of Understanding or create FAQs.

18:10

And publish those.

18:12

And how do you make sure that the import students and their families understand the program requirements as they relate to the import school?

18:22

College catalog is your contract with the student?

18:27

The Student Handbook is another great place, as well as creating FAQs that might be included with students, financial aid Award, for returning award notifications as well.

18:46

We provide you a template that at least gives you an outline on how to create your guidelines.

18:55

You are welcome and encouraged to download it, and use it as a way to figure out what needs to be said in yours.

19:08

As a reminder, effective November first, 20, 23 years ago Friends, we eliminated the balance sheet requirement.

19:19

What does that mean for you?

19:22

Your institution can certify all eligible export applicants.

19:28

All of them.

19:30

You retain your institutional guidelines for the employee, whatever you've got written, to make sure that the employee is eligible.

19:43

and you are expected to keep track of all that as you move through, just like you would any other employee.

19:51

And within this same liaison area, the last option is a copy of the memo that Bob wrote and shared with then Sitting Presidents, as well, as the telos that were listed as active T loads at the time.

20:14

We understand that people move.

20:17

We've had a lot of we've had a lot of change over the last couple of years. So please do be familiar with that memo and understand going forward. You have some opportunities to be a little bit more flexible.

20:30

If you have been operating under the premise that tuition Exchange still expects you to have a balance, So what does that mean?

20:42

T Schools control the number of scholarships offered to import students.

20:50

And at the same time, every school member is expected to offer at least three scholarships annually to maintain good standing and more if your number of exports is high.

21:08

The incoming student, of course, must always meet the institutional requirements for admission, And the scholarship amount depends upon your tuition.

21:20

If your tuition is greater than our annual set rate, then you are obligated to provide set rate.

21:30

If your tuition is less than set rate, then the school is obligated to provide the student with cash in the amount of tuition.

21:42

Cash can include Pell Grants, state grants, ..., if you choose to, award it that way, and any institutional scholarships, as well as making up the difference with tuition exchange.

21:58

You must explain to the family, somewhere in your documentation, that all of those different ways can make up the student's tuition scholarship at your particular school.

22:16

Just like our T lows have a have.

22:21

Have to have, I can't even think all of a sudden just because R, T or R chillers are moving a lot.

22:28

So our friends in admissions and financial aid.

22:32

So, telus, please make sure that you take the time to keep your Admissions Enrollment management staff informed that you are a member of tuition exchange, and provide them with information on what that means.

22:52

You are welcome to download, or to go to the website, and order information.

23:00

It's all free of charge by filling out in the Officer Section T Low option, the T E Material Order Form. And today, it's the fifth option down.

23:13

You can also take the video, put it on your website.

23:18

And you can also take the intro video and put it on your website as well. In fact, we encourage you to do that.

23:27

We continue to have questions about the W nine friends. The W nine form does not expire.

23:35

And the IRS requires them to be replaced only when specific information has changed.

23:43

None of tuition, exchange's specific information required on the W nine has changed. So there is no need for your accounting department to ask for a new W nine form annually.

23:58

If you need a copy of it, it is available in the prospective membership tab, new membership crackit and within the packet the W nine is the third option in the article.

24:12

Please send your folks there when they ask when they ask for a W nine. That's where we send them when they e-mail us.

24:21

If you have questions about anything related to general program administration, Bob, Janet or Suzann can help you if you're looking for specific program information related to how do I manage my program myself, Janet or Suzan are probably the folks that can help you the quickest on that. And if you have any questions at all about finances. That's Christine.

24:53

And all of our e-mails, as well as Bob's phone number and mine, are listed. You are welcome to contact us. Please do not share our contact information with families. We work with you.

25:08

Thank you so much for being with us today. I hope that you found this valuable, and I look forward to seeing you on another webinar real soon. Take care. Have a great day. Bye!