Verbatim Transcript of the TE 104 Series recorded August 6, 2022

Well, hello, friends! This is Janet, and we're so glad that you've decided to join us on Tuition, Exchange 104. This is the fourth in our On Demand Training series.

We provide excellent training for all kinds of things.

This particular series is on demand, meaning you can listen to 1, 101, 102, 103, or 104, you can listen to all of them, or if there's something in one of them, that you are seeking.

Here's a great place to find that information. So let's go ahead and get started.

Today's focus is on our training information, and what it is that we provide.

We're going to spend, most of our time, on reporting, of which there are two.

How to print reports. And also, the fiduciary responsibilities, that all telos have.

All of our training information is housed on our website.

And that's the homepage of our website, and inside of that you will see the Liaison Officer section, which is right below the podcast for the easy app.

You click on that carrot to the right of the words liaison officer. And it will open up three different options for you.

And all of our training information is found inside the training calendar.

And to find trading information for throughout the year, This is where you will go, and you can see that it's liaison officers and then training calendar, And the first thing up at this point is our mandatory professional training, which is the one training that every active ... must participate in, in order to gain full access to the system.

All the rest of our training is, is hopefully something that you will attend, but understand that time is valuable to all of us.

All webinars are recorded and shared within this site.

So, as our webinars start up in August of each year, then the mandatory training will fall lower into on this particular piece on this particular page.

Let's talk about the enrollment report, This is truly the heart and soul of tuition and Exchange, and where do you find it? Well, the first time you find it in institution account, and you, this is inside your ...

portal, not the homepage, go to institution account, and then go to enrollment report current.

And, as I said, it's the heart and soul of our program.

And so this is where you import gilo, as well as export T low, will be.

We'll be utilizing that particular report to confirm that the student is in the right category.

Please remember, import schools cannot add a student to the Enrollment report.

All of you need to confirm the expiration date of this student, primarily as louts an import school responsibility, but it doesn't hurt for the export skull to look at your employees as well.

The export school's primary responsibility is to confirm that the employee remains eligible, not only at the beginning of the semester, but throughout the semester, and even during the course of that student's tuition exchange funding.

Both the import and the export schools need to confirm that the basic tuition for 23 24 is correct. If not, please go to institution, account, and update the information there.

That way, it will hold, If you change, if you update it on the, annual, on the enrollment report itself, it doesn't hold, then also make sure that the scholarship amount is correct, as well, not only for one student, not only for the report, but for each individual student.

You must review the report throughout the year.

Please remember, the report is organic. If you make a change to a student that you have on your side, then the other school also sees the same change. So, the report is due late September.

And import and export schools alike are responsible for ensuring that everybody's reporting correctly on the report.

In the Spring, Afterschool starts, again, you need to make sure that everybody's still enrolled, still employed. And if a student transfered, we need to make sure that all of those things are reflected correctly.

You also need to re certify students after February 15th, 2024.

Do not recertify any earlier. Please. It worked last year, and it makes this It makes the messes more minimal.

So please do not recertify anyone and you also need to review at the close of the spring semester that everybody is still there, correct? And most importantly, friends, look at that expiration date. Is it valid?

Help?

My enrollment report is not complete.

There's missing records. Well, number one import schools. Did you click the enroll button?

If yes, then e-mail that Export T low. Asking them to add the student.

export schools.

If you need any assistance, please contact either susann or myself.

So what's it look like for the import schools?

You go to the application that's approved.

You confirm that it says approved, you confirm that the tuition is correct or set rate.

You mark the enrolled button, that little blue box, and you click Update Import Schools, you are done. Nothing more that you need to do with that application.

Now it's the exports turn.

Exports, you're going to look into the approved, going to go to Applications first.

Then you're going to go to Applications New, then you're going to go to the, to be enrolled, 23 24 And click on that student's name.

The first step is you're going to scroll to the bottom, and you're going to say Add Student.

See the blue button there, that moves you to a second screen export schools.

Now you're going to say fall 2023 and then you're going to click add student one more time That will add the student to your enrollment report.

It is a two prong requirement, Everybody has to do their job. And if you are doing it for the first time this academic year, please wait until all of your approved imports have been added to the system and pay your participation fees just once.

There's a lot of conflict and consternation and confusion. How about that for three big C words, about how do I update the expiration date?

The expiration date is also known to some of us as the graduation date.

All right.

So, on the Enrollment report, if the student did not return for Spring or for Fall, you are going to open your Enrollment Report, click on the student's name, and then again, scroll to the bottom of the student's record, and select the most appropriate drop option.

If the student was enrolled in the spring of 2023, but for whatever reason, has decided not to return for fall 2024, what you're going to do is drop at the end of last semester.

If the student tells you, this semester, I'm going to graduate in December, you can update his record now by same process, but she will say, drop at the end of this semester.

If an employee quits working after school starts, let's say in October, you would go to your enrollment report and drop the student at the end of this semester.

If the employee quits before school starts, then you would drop that student at the end of last semester.

In the case of a ...

of a parent, no longer eligible, please e-mail the other school involved.

Directly, don't assume that the student will confess, because, sadly, they do not.

If neither option is correct, then please contact suzan or myself. We would need the student's name, the student's T E ID, and the last time that student was enrolled.

When you're confirming the accuracy of the report, let's talk about what the export school needs to do. And remember, friends were always an export and import school, for the most part.

So, did all eligible returning students, are they showing up on your enrollment report?

And do they look? right?

So, you need to look at that first, and then export schools, You're going to withdraw any student whose parent is no longer considered eligible.

That could be a student or an applicant.

And at the same time, any applicants that do not enroll or are still in decision pending export schools, you click the withdraw button.

The most important thing, export schools that you will need to do over the next 60 days is to stay on top of adding new students.

So please make yourself a note for every couple of days, go out and look at that enrollment report, or look at that applications exports to be enrolled, to make sure that there's nobody just hanging out there.

Import side.

You either accept or deny all applications and you should also deny or reject any students who are no longer eligible for the tuition exchange.

Whether they're a student or an applicant, please don't get hung up on the word, deny, reject. Think about it. The student denied you, their presence.

Make sure that the scholarship amount is correct for every student.

Make sure you have shared that information with the Financial Aid Office, and you have click the Enroll button for all students who are enrolled and attending your institution as an import.

Remember, again, the report is shared by both sides of the house, the export school, as well as the import school.

And the import school enrolls that student.

You do not add the student.

The export school adds the student to the report.

And e-mails do keep you up to date. But I also understand you get tons of them.

So, I'm probably just going out and looking at your applications to be enrolled for the 23 24 year will keep you much more in tune.

Morning rule Robinson.

School import schools never add a Missing Student to the Enrollment Report.

You click the enroll button.

The export school adds students, if we find that a continuing student is missing from your 2324 enrollment report, go back and look at last year's enrollment report.

What's the student listed there?

If he or she was, look at the expiration date, if the student was not listed one more year back. Alright.

If the student expired, please make sure with the other teela that the student is still eligible.

And as a reminder, friends, if you are updating a record, please add in the comments why.

Here, it no longer eligible. Student didn't meet, required academic requirements, whatever. But that way, we know that what you're doing is legitimate and there's a reason for it.

That way we we keep everybody in the know, and if a student should still be on your enrollment report and he is not, please contact either Susanna myself for assistance.

We get lots of questions and the following few slides are the most frequent questions that we receive.

Where am I knew? Where my new import students? Well, number one, friends, did the import school mark the student as enrolled?

That starts the process, and if the import school marked the student is enrolled, export school, did you add the student?

It's a two-way street friends. We need both of you to be doing your work.

Why is mice cool, Not listed on the drop-down box.

Well, if you're the import school, trying to add a student, there's your reason you cannot add a student.

Only the export school can add the import school marks, the student is enrolled.

Now, in the case of a continuing student, you'll who's missing.

You will need tuition exchange, centrals, help, please e-mail either Suzanne or myself with the student's name or ID when they started, and the other school involved. And that way we can do our search to find that student and get them added.

The expiration date is wrong, how do I fix it?

Well, friends if it's wrong, because it should be lengthened, meaning it shows that the student started in the fall and is going to be done in the spring the student didn't understand what the question was. So what you'll need to do in that case is contact either Suzanne or myself.

And we're happy to extend the date If you're asking for an extension on a date and the student should graduate in May, please first confirm with the other school involved. Just because the student perceives that they should get more does not necessarily ring true. Many schools limit tuition exchange to a maximum of eight semesters. Please do your homework, before asking us to extend something. Because we'll ask you to prove that you have done that homework, alright?

Now, if a student is going to leave at the end of first semester, and you know it now, you would say, drop at the end of the semester drop at the end of this semester.

If you know that the student, if the student did not return, you would say, drop at the end of last semester.

A student on my enrollment report is not enrolled right now.

Well, number one, are they coming in the spring on a leave of absence?

That's a little bit different.

A leave of absence you would need to mark that differently but if the student is not returning after summer, the student dropped at the end of last semester.

And if the student never attended, please contact Suzann or myself.

Again, students name T ID the fact that they never attended any other school involved and we will fix that for you.

Biographical information is missing or it's wrong. Well, friends, if T admin, Suzanne, or myself, Christine or Bob, have been in the record, the first name sadly goes missing.

And if any of us are in the record and find a missing first name, you often will see the word on known.

You can fix anything in the white section of the student's easy app, or of the Enrolled Student Edit Students section.

So, you can fix those, and then just please make sure you click Update so that everything saves if you have trouble. Again, you know, the drill, e-mail janitor, Suzanne.

Include the T ID, the student's name, and what should be fixed, and also, the other school involved.

Oh, my students are transferring to a new school. Boy, that's been a big thing this year. So, number one, current import school, you must update students expiration date. The system only allows one active student record at a time.

The export school is where the student starts.

The student goes back to the home-school Export School and completes a new, easy, online out listing the new import School.

As a reminder on both sides of the fence, Scott Tea scholarships are not guaranteed and they are not an employee benefit.

And so, most are excuse me, both schools must agree to support the student and the scholarship application.

And transfer students are generally measured based on their academic credentials, where they attended post-secondary school last, as opposed to their high school record and time. So that's a little bit of a shock.

We've also had an awful lot of employees move from school A school B, So, export schools, the old export school needs to update the record.

Again, can have to live records in the system simultaneously, and the new export employer helps the employee complete a new T easy online app.

That does not transfer friends. It's a new application.

So what about retired deceased contract laid off employes while our handbook does talk about that, starting on page 50?

And we also encourage you to utilize a memo memo of understanding which lays out all of the different information that I'm particularly a retired employ, May, maybe may be seeking or looking. For example, I retired once and then went back to work again.

And so, if my former employee had said, yes, you can use Tuition Exchange, I got a new job at a new school, Well, I'm still working at a member schools. So please take a few moments to review the memo of understanding that's in the training section and in the 2324 mandatory training materials, And it's actually the fourth option down.

I am not a lawyer. So please, while I wrote it, please make sure that your legal staff reviews it or somebody above you reviews it to make sure that everyone's on the right page, and there's no misunderstandings.

Employees are pressuring me to recertify, I'm sorry, friends. No school can recertify until after February 15th, 2024.

So please add to your information that all students will, all eligible employees will be recertified beginning in February, all right, That way.

We know that our students who have graduated or who are graduating, or who left midyear, are not moved forward in the system. It just really helped keep the system cleaner this year than it had been in the past.

Because I have encouraged you to look at enrolled students, edit students, many of you have stumbled across the import confirmation report, which you should have been doing for the last couple of years.

So, this is the second of two reports, This particular report is correct, is completed in conjunction with your Financial Aid Office. It keeps shoeing compliance, and it makes sure that the enrollment report is correct.

We continue to add missing students from last year or even two years ago into our system this year.

So if you do the import, confirmation report timely in the spring, is best.

That way, you know, who's, who's on first and who never showed up and who's gonna going to make a home run by graduating in May.

It also helps the other office involved financial aid, or HR, improve the improve their understanding of the Scholarship Program as a whole.

So this report needs to be completed prior to May one.

And what you're doing is you're comparing it in, or the import confirmation report against the enrollment report, against financial aids funding, and every import should be on both reports.

If a student is missing, know the drill.

E-mailed Suzan, or Janet, T E ID, student's name.

When they began, when do you expect them to end and the name of the other school involved?

Where do I find the confirmation report as I shared? people have gone to edit students this year more than ever before and right below edit students, you'll find import confirmation.

You can look at that at any time please make sure that by May one you've either confirmed or Denied the students. So let's talk about what that means: Work with your Financial aid Office to make sure the kid was funded. All right.

And funded means that sometime during that academic year, they were a student at your institution.

And so confirm would be, yes, this student was here some time during the year, and receive tuition exchange.

Denied means the student never ever in this academic year was at my institution and received tuition Exchange funding.

And again, please complete the report in the spring. Yes. We'll remind you throughout the year.

Membership dues and fees are the way that, or is the way that tuition Exchange operates. That's our funding mechanism.

Your annual dues, more due July 15th, and are considered late if you have not paid by September 15th And our late fees will be assessed, perhaps $50 for each month, not paid in full.

For the 23, 24 year, your membership dues are $600, and if you're not sure if you've paid, please go to the institution account inside your portal.

Click on the plus sign, making a minus scroll to the bottom.

You will see membership dues, open it up.

If it says total, do you haven't paid it yet?

If it says, Nothing do at this time, you are paid in full. Thank you very much.

The second fee that is charged annually is the participation fee. And we often refer to that as a P fee.

And there are two types of those fees.

The export school pays $45 per successful export, meaning the student is listed on the enrollment report and being funded at the import school.

Import fees of $45 is the D C three option, and that's called Double Credit three.

I've got more information on that in just a minute, So hold tight.

In all cases, P fees are not prorated.

If a student leaves midyear, there's no refund.

If the student transfers to a new school, the export school is then charged another $45 for that student.

Schools.

You may pass that fee on, but we expect a payment directly from you, and then you collect to repay yourselves but please do not send individual checks from families.

In all cases, partizan, participation fees are due upon receipts.

How do I get a copy of my participation fee?

Every time you submit the enrollment report, a new, the fee is generated.

You need to make sure that you review this statement because it may not be a new bill. You may have paid everything.

And again, the P P is always due upon receipt.

We accept checks or credit card and there's no processing fees if you choose to pay by credit card.

Again, as a reminder, students transferring midyear to another TE school export schools. It's a new $45. And Bob doesn't let me deal with Money, friends, so if you have any questions about payment, please contact Christine Love directly. And her e-mail is listed below.

So, yeah, you talked about DC three, what is it?

Well, if you your school, here's a member of any other Exchange program and you're feeling stressed out about importing three new students into the Tuition Exchange program, the D C three program may be your answer.

The handbook talks about the D C three as does the instructions section of the TE portal.

So both of those places talk about more, or provide you more information, including a list of this, the other programs that are approved.

Well, folks, that brings us to the conclusion of this particular webinar. We hope that you found it useful if you have questions about the program in general.

Bob or myself are happy to answer those questions. If you have questions about the portal or the website, or training that Suzanne or myself, and remember Christine's all about the money. Thank you so much for joining me today. I hope that you found this valuable. And we look forward to connecting in the future. Have a great day, and above all, please stay well. Bye, Bye.

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