**New Academic Year Checklist**

**Institution Account Review and Updates**

**Complete this process now**

* Attend Mandatory Training – by registering using the link below <https://attendee.gotowebinar.com/rt/8380094329451934044>
* Enrollment Reports will be made available on August 15. And the Enrollment Report is unavailable until the primary Tuition Exchange Liaison Officer (TELO) completes mandatory Training.

Updating each school's record for Mandatory Training attendance is a manual process. The 2023-24 Enrollment Report is not necessary until mid-August. Your patience is appreciated.

r Confirm and update, if necessary, your institutional Application deadline

Institution Account Institution Information

r Update Tuition and Scholarship amount

Institution Account Institution Information

r Review the Overview Information – is the information current and friendly?

Institution Account Institution Information – at the bottom left side

r Confirm the Liaison Contact and backup TELO are current

Institution Account Institution Information – right side

If updates are required, email Suzanne with the changes at [sleance@tuitionexchange.org](mailto:sleance@tuitionexchange.org). Include the person’s name, title, email address, and phone number in your email.

Schools are encouraged to adopt the Import/Export TE:O concept. Export Liaisons are most familiar with employees, while Import Liaisons are most familiar with Admission processes.

r Confirm that Additional Contacts and emails are current, including the president, HR, Admissions, Financial Aid, and Invoice contact.

Institution Account Institution Information – right side

r Pay the Membership Dues – if the membership dues are outstanding when you log in to the system, you will see a blue button that says *Pay Dues Online*. TE accepts credit cards and checks. Members are not charged any credit card fees. For questions about dues and fees payment, contact Kristine Lev at [klev@tuitionexchange.org](mailto:klev@tuitionexchange.org).

Invoices were emailed on June 26, 2023, to the primary and backup TELO and Invoice Contact if provided. Payment is due by July 15, 2023. Late fees will be accessed if not received by September 15, 2023.

**Application Review and Updates**

**Application & Enrollment Report**

r Review **Export** Applications (new)

Update any remaining 23-24 Decision Pending Applications to WITHDRAW

*Export schools always withdraw applications and comments are helpful*

r Review **Import** Applications (new)

Update any remaining 23-24 Decision Pending Applications to DENY

*Import schools always deny applications and comments are helpful*

**Enrollment Report**

**Available after August 15 to all who attended the live Mandatory Training**

r Confirm that all 23-24 Approved Import and Enrolled Students are enrolled and attending your institution.

If the student is not enrolled, update the student's expiration on the Enrollment Report and email the IMPORT school TELO. See below for instructions on how to update the expiration date.

r Review the *Enrollment Report* confirming that all continuing 23-24 Export students’ parent/spouse/registered domestic partner remains eligible employees.

If the employee is no longer eligible, update the *student's expiration* *date* on the Enrollment Report and email the IMPORT school TE Liaison Office.

To update the *student's expiration date*: Open your Enrollment Report – click on the student's name, then scroll to the bottom and select *DROP at the END of the LAST semester*.

Confirm the Expiration date is accurate for each Import. If incorrect, please email Janet ([jhanson@tuitionexchange.org](mailto:jhanson@tuitionexchange.org)) or Suzanne ([sleance@tuitionexchange.org](mailto:sleance@tuitionexchange.org)) to update the record. Please include the TE ID, the student's full name, and the new expiration date.

**Updated TE Liaison Officer Handbook**

* The TE Liaison Officer Handbook is available for download. <https://www.tuitionexchange.org/vnews/display.v/SEC/Liaison%20Officers> Copy the link to your favorite browser and download a copy for your review.
* The Handbook is always in flux; we captured most of the issues.
* Should you have an issue that needs resolution, please email Janet ([jhanson@tuitionexchange.org](mailto:jhanson@tuitionexchange.org)) for assistance.

**You cannot add New Students to the 2023-2024 Enrollment Report until Mid-August.**

Enrollment Reports will be made available on August 15. And the Enrollment Report is unavailable until the primary TELO completes mandatory Training. Updating each school's record for Mandatory Training attendance is a manual process. The 2023-24 Enrollment Report is not necessary until mid-August. Your patience is appreciated

**TE Central will provide Enrollment Report training in August.**

**Import Schools**

**Do not mark any new students Enrolled until after the Fall/Spring semester begins.**

r For each approved 2023-24 student, confirm the student enrolled and click the Enrolled box (below the comment section of the student's record).

If the student DID NOT enroll, update the record to DENY.

**Updating new 23-24 students to your Enrollment Report**

**Export Schools**

**Once the email is received, complete the ADD Student process as soon as possible**

r Once the Import school clicks the Enrolled box, it is the EXPORT school's responsibility to ADD the student to the Enrollment Report.

Export Applications (NEW) To Be Enrolled 2023-2024 Section.

Click on the student's name, scroll to the bottom, and click ADD STUDENT. On the next page, click on Fall 2023. The student will now appear on the Enrollment Reports for the Import and Export School

r Once all students have been added, Open the Enrollment Report and confirm that all students appear on the Report. Print and save a copy of the Enrollment Report.

r Scroll to the bottom of the Enrollment Report and click submit.

r The Participation Fee Invoice is displayed on your screen.

Participation Invoices are due upon receipt. Please remit payment upon receipt.

r Not all Import schools start school simultaneously. The EXPORT school is responsible for responding to emails received and reviewing the To Be Enrolled section often until mid-October, ensuring all ADD STUDENTS are added.

**Do not submit any Participation Fee payments until your 2023-2024 Enrollment Report is completed. Remember, TE Central expects one payment from the school (check or credit card), not individual family checks.**