


2017-18 TE RECIPIENT REVIEW
2018-19 APPROVAL AND PROCESSING
REMINDERS
TE REPORTS
TE CENTRAL UPDATES

JANUARY, 2018 TUITION EXCHANGE WEBINAR
JANET DODSON, ASSOCIATE DIRECTOR OF
COMMUNICATIONS

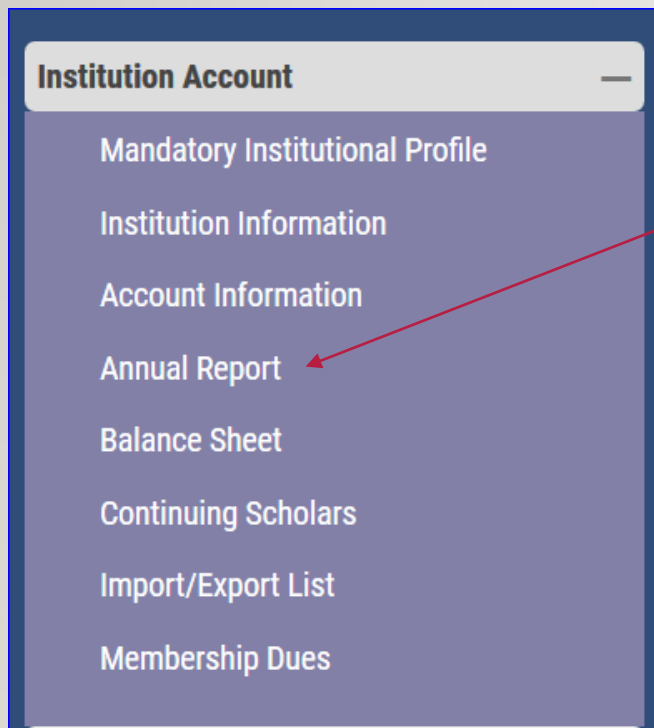
1/25/2018



2 TODAY'S FOCUS

- 2017 - 18 Recipient Review
- 2018 -19 Approval and Processing
- TE Reports
- TE Central Updates
- Recap

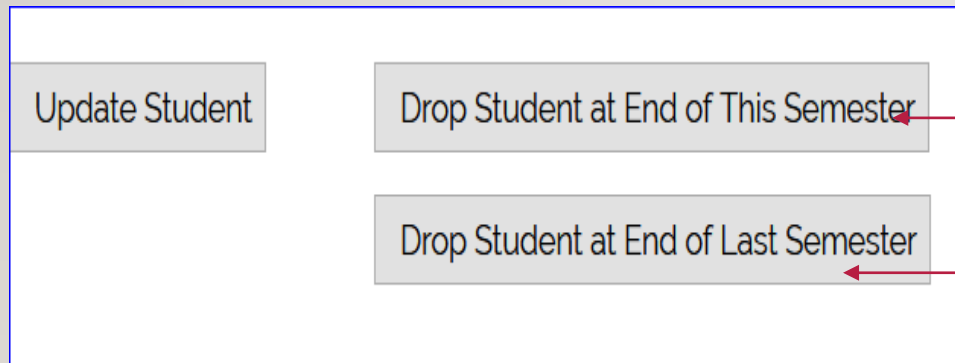
3 ANNUAL REPORT REVIEW



- Open your Annual Report

4 2017-18 ANNUAL REPORT REVIEW

- Confirm your 2017-18 Annual Report is correct and current
- Are all listed students still enrolled and eligible
 - If no, update the student's expiration date
 - Annual Report – click on student's name, then again and update the expiration date



End of this semester is
6.1.18

End of last semester is
1.1.18

5 ANNUAL REPORT REVIEW

Add new students by [clicking here](#)

Imports for 2017-2018					
Name	TE ID	Exp. Inst.	Start Date	Exp. Date	Semesters Remaining
Doe, Nancy	1111	College One	6/1/2016	6/1/2020	5
Jones, MaryLou	3333	College One	9/1/2017	6/1/2021	7
Jones, Susie	2222	College One	9/1/2015	6/1/2019	3

Exports for 2017-2018							
Name	TE ID	Imp. Inst.	Start Date	Exp. Date	Semesters Remaining	EI3 for 2017-2018	Re-certify 2018-2019
Doe, Michael	6666	College One	9/1/2014	6/1/2018	1	Yes <input checked="" type="radio"/> No <input type="radio"/>	n/a
Henry, George	5858	College One	9/1/2017	6/1/2021	7	Yes <input checked="" type="radio"/> No <input type="radio"/>	<input type="button" value="Re-certify"/>
Jones, Mary	7890	College One	9/1/2017	6/1/2021	7	Yes <input checked="" type="radio"/> No <input type="radio"/>	<input type="button" value="Re-certify"/>

- Confirm each enrolled **IMPORT** continues enrollment at your school
- Confirm each Export dependent family member employed at your school remains eligible

6 ANNUAL REPORT REVIEW - IMPORTS

Imports for 2017-2018					
Name	TE ID	Exp. Inst.	Start Date	Exp. Date	Semesters Remaining
Doe, Nancy	1111	College One	6/1/2016	6/1/2020	5
Jones, MaryLou	3333	College One	9/1/2017	6/1/2021	7
Jones, Susie	2222	College One	9/1/2015	6/1/2019	3

- Print your Annual Report
- Confirm with the Registrar's Office all students successfully completed the Fall semester and are enrolled full-time for the Winter/Spring semester
- If not update the student's Expiration date (refer to slide 4 or 7)

7 ANNUAL REPORT REVIEW - IMPORTS

Imports for 2017-2018					
Name	TE ID	Exp. Inst.	Start Date	Exp. Date	Semesters Remaining
Doe, Nancy	1111	College One	6/1/2016	6/1/2020	5
Jones, MaryLou	3333	College One	9/1/2017	6/1/2021	7
Jones, Susie	2222	College One	9/1/2015	6/1/2019	3

Student Expires End of Spring 2020

Program Option Traditional Double Credit Program (\$40 fee) [What is this?](#)

Importing Institution (School Student will Attend)

Update Student Drop Student at End of This Semester

Drop Student at End of Last Semester

- The Registrar informs you that Nancy Doe is no longer enrolled at your school
- Inside your Annual Report, click on Nancy's name, then again, now, scroll to the bottom of Nancy's record and select Drop at the END of LAST semester to update her record

8 ANNUAL REPORT REVIEW - IMPORTS

Imports for 2017-2018					
Name	TE ID	Exp. Inst.	Start Date	Exp. Date	Semesters Remaining
Doe, Nancy	1111	College One	6/1/2016	1/1/2018	0
Jones, MaryLou	3333	College One	9/1/2017	6/1/2021	7
Jones, Susie	2222	College One	9/1/2015	6/1/2019	3

- Return to your Annual Report and review Nancy's record. Her expiration date is updated and her remaining semesters are 0
- We are close to launching email notifications informing the Export/Import school of changes to the shared record

9 ANNUAL REPORT REVIEW - EXPORTS

Exports for 2017-2018							
Name	TE ID	Imp. Inst.	Start Date	Exp. Date	Semesters Remaining	Elg for 2017-2018	Re-certify 2018-2019
Doe, Michael	6666	College One	9/1/2014	6/1/2018	1	Yes <input checked="" type="radio"/> No <input type="radio"/>	n/a
Henry, George	5858	College One	9/1/2017	6/1/2021	7	Yes <input checked="" type="radio"/> No <input type="radio"/>	Re-certify
Jones, Mary	7890	College One	9/1/2017	6/1/2021	7	Yes <input checked="" type="radio"/> No <input type="radio"/>	Re-certify
Jones 2nd semester, George	5858	College One	1/1/2018	6/1/2021	7	Yes <input type="radio"/> No <input checked="" type="radio"/>	Re-certify

- Confirm with Human Resources all employees retain their eligibility
- If not update the student's Expiration date (see slide 4) AND notify the Import school TELO immediately
- We are close to launching email notifications informing the Export/Import school of changes to the shared record

10 ANNUAL REPORT REVIEW

- Should your review result in a student not appearing on your Annual Report and your school is funding the student with a TE scholarship – contact Janet Dodson for further assistance
- If the student attended any time during the current school year, you update the student's expiration date
 - See Slide 4 or 7 for visual directions
 - Do not DELETE a student record as this eliminates the record completely
- Should you discover a student NEVER enrolled – contact Janet Dodson for further options

II ANNUAL REPORT REVIEW

- Incorrect expiration dates continue to plague the system
 - The system calculates expiration dates based on the entering class
 - The system only understands whole numbers
 - The system doesn't understand words in fields that expect numbers
- For example – you select the student's class as FRESHMAN – the system calculates the expected graduation date four years out
- If your school awards TE for less than 8 semesters, be sure you are in contact with the importing school

12 ANNUAL REPORT REVIEW

- Once you confirm the Annual Report is correct for second semester SUBMIT IT
- Print a copy for your records
- Print your Participation Fees statement; and
- Print your Balance Sheet
- If the Participation Fee statement shows:
 - a balance due, remit immediately
 - Note – students transferring to a different TE school second semester are charged another \$40 participation fee
 - The participation fee is no longer waived
- The Annual Report is fluid and changes when shared student records are modified
- Be sure to print and save your Annual Report and Balance Sheets each time you modify the report

13 ANNUAL REPORT REVIEW

- Second semester new students
 - Brand new student to TE
 - Contact the other school to confirm support
 - Export school must add the NEW second semester student to their Annual Report
- Adding new 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

14 ANNUAL REPORT UPCOMING REMINDERS

- March 2018
 - Financial Aid Offices will be asked to confirm all IMPORT students funded on your current academic year Annual Report
 - This confirmation is due back to TE Central in April
 - The Financial Aid Office and the TELO will work together to make any necessary corrections
 - As always, TELO's are copied on all notices
- Remember to review your Annual Report at the conclusion of Spring semester 2018
- The 2017-18 Annual Report information is removed from the system 6.30.18
 - Please be prompt with your final review

15 2018-19 APPLICATION PROCESS

Applications

This section is for applicants not yet enrolled.
Scholarship Certification & Application
Application

[View Applicants \(exports\)](#)

[View Submissions \(imports\)](#)

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

- Application pertains to new students and Scholarship Recertification pertains to continuing students
- The term View Applicants applies to your EXPORTS and the term View Submissions applies to your IMPORTS

16 2018-19 RECERTIFICATION PROCESS – EXPORTS

Exports for 2017-2018							
Name	TE ID	Imp. Inst.	Start Date	Exp. Date	Semesters Remaining	Elg for 2017-2018	Re-certify 2018-2019
Doe, Michael	6666	College One	9/1/2014	6/1/2018	1	Yes <input checked="" type="radio"/> No <input type="radio"/>	n/a
Henry, George	5858	College One	9/1/2017	6/1/2021	7	Yes <input checked="" type="radio"/> No <input type="radio"/>	Re-certify
Jones, Mary	7890	College One	9/1/2017	6/1/2021	7	Yes <input checked="" type="radio"/> No <input type="radio"/>	Re-certified
Jones 2nd semester, George	5858	College One	1/1/2018	6/1/2021	7	Yes <input type="radio"/> No <input checked="" type="radio"/>	Re-certify

Parents and Imports are anxiously awaiting current TE recipient recertifications – please recertify soon!

- Scholarship Recertification applies to continuing students
- The recertification process is quick and easy
- Open the Annual Report and check the Recertify box for each student
- If the box reads Re-certified your work is done
- If it reads RECERTIFY – click the button for all eligible students
- If the box reads N/A review the expiration date for accuracy

17 2018-19 RECERTIFICATION PROCESS - EXPORTS

Scholarship Recertification of Eligibility Submissions

Print Now

School Year:	2018 - 2019
Student First Name:	MaryLou
Student Last Name:	Jones
TE ID:	3333
Exporting Comments:	
Exporting Inst:	College One Janet Dodson, TELO jdodson@tuitionexchange.org
Importing Inst:	Tuition Exchange (The) Mr. Robert Shorb, Executive Director/CEO 301-941-1827 jdodson@tuitionexchange.org
Scholarship Amount:	
Years:	
Approved:	New
Comments:	
	Submit

- Inside the Annual Report, click the Recertify button
- The screen to the left opens, scroll to the bottom and click submit
- The IMPORT TELO receives a notification email; and,
- Provided the parent and student emails are valid emails are sent to them too

18 2018-19 RECERTIFICATION PROCESS - EXPORTS

Scholarship Re-certification of Eligibility

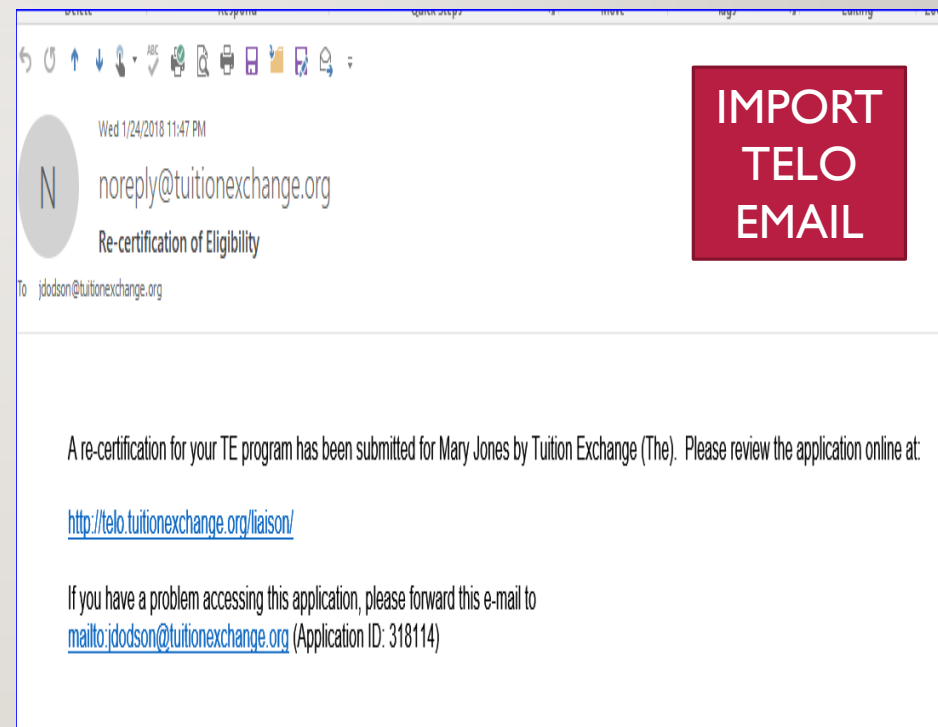
Application processed successfully.

[Back to Annual Report](#)

Once the submit button is clicked, this notice appears

Parent has been notified of recertification.

Student has been notified of recertification.



If there is no valid emails the message alerts you that the parent/student were not provided an update

Do not forward this email to the family!

19 2018-19 RECERTIFICATION PROCESS – EXPORT EMAIL NOTIFICATIONS

From: noreply@tuitionexchange.org

Date: January 25, 2018 at 12:08:12 AM CST

To: Name of Student

Subject: Tuition Exchange Application from NAME OF EXPORT SCHOOL

Dear Nancy Jane Jones,

Your Tuition Exchange application for re-certification was recently submitted for TE award consideration.

If you have questions regarding next steps please contact the financial aid office at the school where you are attending.

Thank You

From: noreply@tuitionexchange.org

Date: January 25, 2018 at 12:08:12 AM CST

To: Name of Employee

Subject: Tuition Exchange Application from NAME OF EXPORT SCHOOL

Dear NAME OF PARENT,

Your Tuition Exchange application for re-certification on behalf of Nancy Jane Jones has recently submitted.

If you have questions regarding next steps please contact the financial aid office at the school where your dependent is enrolled and attending.

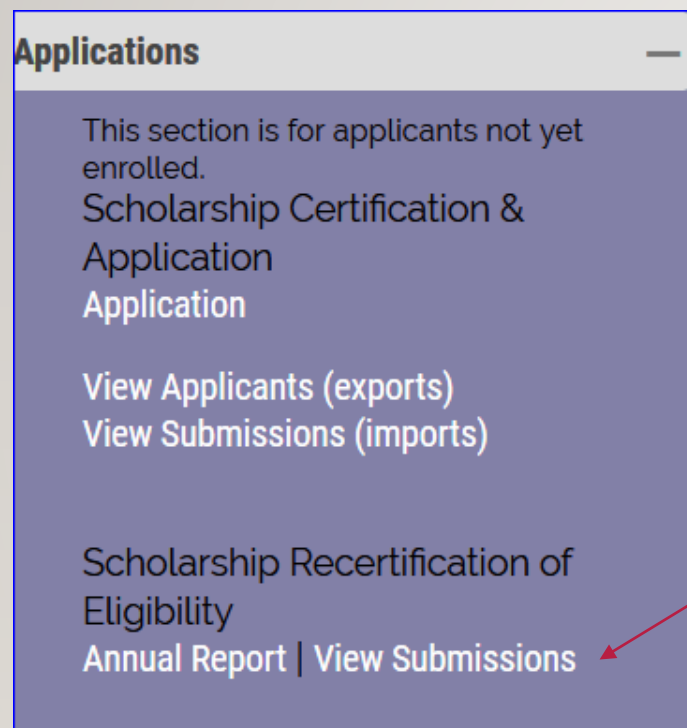
Thank You



20 2018-19 RECERTIFICATION PROCESS

- If a Re-certified student is no longer eligible – update the student's expiration date
- Updating the expiration date trumps the original re-certification process
- Review slide 4 or 7 for visual directions to update the student's expiration date

21 2018-19 RECERTIFICATION PROCESS - IMPORTS



Applications

This section is for applicants not yet enrolled.
Scholarship Certification & Application
Application

[View Applicants \(exports\)](#)
[View Submissions \(imports\)](#)

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

- Imports require action too.
- Review the [View Submissions](#) section for continuing student **IMPORTS** and **EXPORTS** who have been recertified in the current academic year for next year

22 2018-19 RECERTIFICATION PROCESS - IMPORTS

Scholarship Recertification of Eligibility Submissions

Imports - New Continuing Forms

Date	Student	TE ID	Exp. Inst	Year
01/25/2018	Jones, Mary	7890	Tuition Exchange (The)	2018-2019

- Click on the student's name you wish to recertify for 2018-19
- This opens up the student's 2018-19 record
- If you do not recertify each eligible student, the student will NOT appear on your 2018-19 Annual Report

23 2018-19 RECERTIFICATION PROCESS - IMPORTS

Scholarship Recertification of Eligibility Submissions	
Print Now	
School Year:	2018 - 2019
Student Name:	Mary Jones
TE ID:	7890
Exporting Comments:	
Exporting Inst:	Tuition Exchange (The) Mr. Robert Shorb, Executive Director/CEO 301-941-1827 jdodson@tuitionexchange.org
Importing Inst:	College One Janet Dodson, TELO jdodson@tuitionexchange.org
Scholarship Amount:*	<input type="text"/> Must be a number
Years:*	<input type="text"/>
Approved:*	<input type="radio"/> Yes <input type="radio"/> No
Comments:	<input type="text"/>
Submit	

- Each IMPORT school must complete the information for EACH eligible import
- The scholarship amount is the dollar amount the student will receive in TE funds for the 18-19 academic year
 - Whole numbers only and NO \$ signs, commas, periods or cent signs
- Years is the total number of years you expect to support the student
- Approved click Yes
- Comments are shared with the other school
- Be sure to click SUBMIT

24 2018-19 APPLICATION PROCESS – NEW STUDENT

- Engage the EZ application option
 - The EZ app can free up your time for other important tasks
- If you engage the EZ app you still control the approval process
- Complete the application via the Application option in your TELO portal
- If you complete the application you are automatically approving the application when you click submit!
 - Remember you must click preview, close the preview screen and then click submit

25 2018-19 APPLICATION PROCESS – NEW STUDENT

Often 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 is submitted

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 start again with a NEW APPLICATION or the student completes another EZ App**

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

26 2018-19 APPLICATION PROCESS - IMPORT

APPLICATIONS
Submissions to your institution (Imports)

2018-2019

Decision Pending 2018 - 2019

Date	Student	TE ID	Exp. Inst	Year	Status
01/25/2018	Jones, Margie Mae	1234	College Four	2018 - 2019	Decision Pending

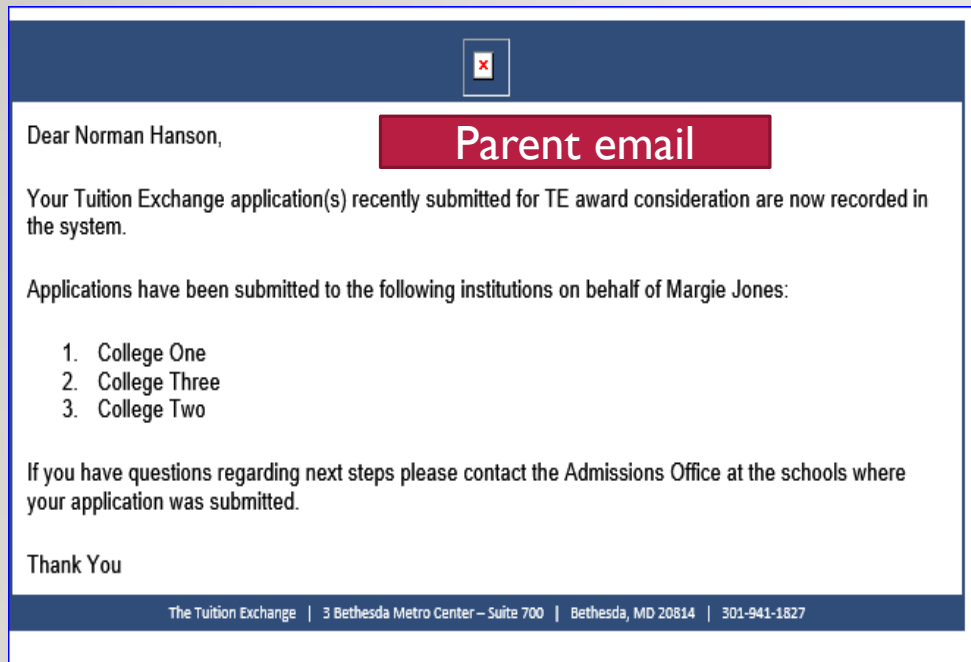
- The Import school needs to review the Decision Pending section often and...
 - APPROVE - means your school will fund the student or
 - DENY – is a multi-purpose word
 - either the school denies the student the award OR
 - the student declines the award by saying no OR not completing the admission application process or
 - WAITLIST – means you will consider the student should a spot become available

27 2018-19 APPLICATION PROCESS – IMPORT

Decision:*	<input checked="" type="radio"/> Approved <input type="radio"/> Denied <input type="radio"/> Wait List <input type="radio"/> Withdrawn
Tuition Offer:*	<input type="radio"/> N/A <input checked="" type="radio"/> Full Tuition of . <input type="radio"/> "Set Rate" amount of ... <input type="radio"/> Other amount of ... \$ 30000 <small>Must be a number</small>
Comments:	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>
Enrolled: <small>By checking the enrolled button, all other approved applications for this student will be withdraw.</small>	<input type="checkbox"/>
<input type="button" value="Update Application"/>	

- When approving an IMPORT application you click **Approved**, one of the three tuition options **AND** the tuition amount
- Comments are shared with the EXPORT school
- Be sure to click **Update Application**

28 2018-19 APPLICATION PROCESS – EMAIL COMMUNICATION



Dear Norman Hanson,

Parent email

Your Tuition Exchange application(s) recently submitted for TE award consideration are now recorded in the system.

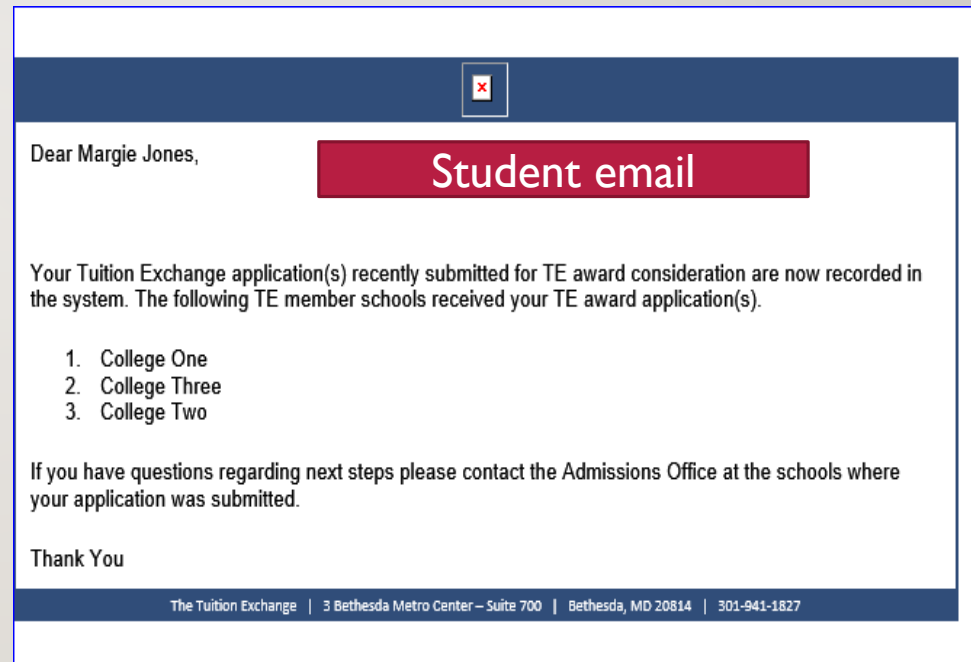
Applications have been submitted to the following institutions on behalf of Margie Jones:

1. College One
2. College Three
3. College Two

If you have questions regarding next steps please contact the Admissions Office at the schools where your application was submitted.

Thank You

The Tuition Exchange | 3 Bethesda Metro Center – Suite 700 | Bethesda, MD 20814 | 301-941-1827



Dear Margie Jones,

Student email

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).

1. College One
2. College Three
3. College Two

If you have questions regarding next steps please contact the Admissions Office at the schools where your application was submitted.

Thank You

The Tuition Exchange | 3 Bethesda Metro Center – Suite 700 | Bethesda, MD 20814 | 301-941-1827

Above is an example of a NEW TE scholar email. These emails are mailed from a NoReply email address. This email box is not monitored. No emails for deny, withdraw, or waitlist are sent to families.

29 TELO REPORT OPTIONS

Applications —

This section is for applicants not yet enrolled.
Scholarship Certification & Application
Application

[View Applicants \(exports\)](#)
[View Submissions \(imports\)](#)

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

Forms Deletion
[Delete Submissions](#)

Reports
[Export Applicant Report](#)

[Import Applicant Report](#)

- Firefox or Chrome work best with the TE portal
- Reports can be downloaded and then uploaded to your CSM system
- The details presented in the report are the details entered on the application either by the family or TELO

30 TELO REPORT IMPORTS/EXPORTS

Click Tools for download options

Click the + to expand the year

Application EXP IMP

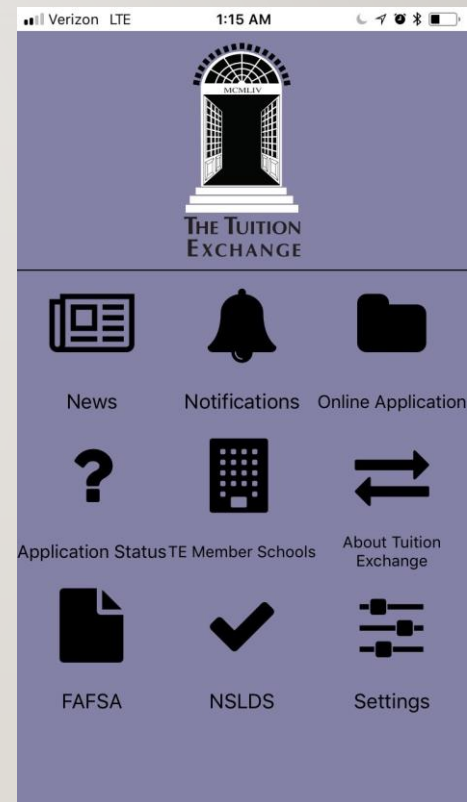
Applicant Report for active Applicants. Click "Tools" to save as excel or print.

+	schoolyear	ssn	lname	fname	addr 1	addr 2	addr 3	phone	semail	exportschool	importscool	parent	pemail	status	appstatus
+	2017														
+	2018														
+	2019														

The school year is reflective of the end of the academic year. For example, 2017 is 2016-17

3 | TE CENTRAL UPDATES

- Set-Rate
 - 2018-19 is 36,000
 - 2019-20 is 37,000
- Tuition Exchange – there’s an app for that...
 - Apple Store – search Tuition Exchange
 - Google Play Store – search Tuition Exchange



32 TE CENTRAL UPDATES

Families	
EZ-application instructions and podcast	
Tuition Opportunities	>
Online Application	
Application Status	
Tuition Exchange Member Schools	
Map of Tuition Exchange Member Schools	
Tuition Exchange School Search	
FACHEX School Search	>
News	
Scholarship Award Process	


- Check out the latest addition to the Families section
- Each TE member school can be found on the google map
- TE assumes no responsibility for your school's Google rating

33 TE CENTRAL UPDATES

Families

[Home](#) / [Families](#) / [Map of Tuition Exchange Member Schools](#)


Map of Tuition Exchange Member Schools



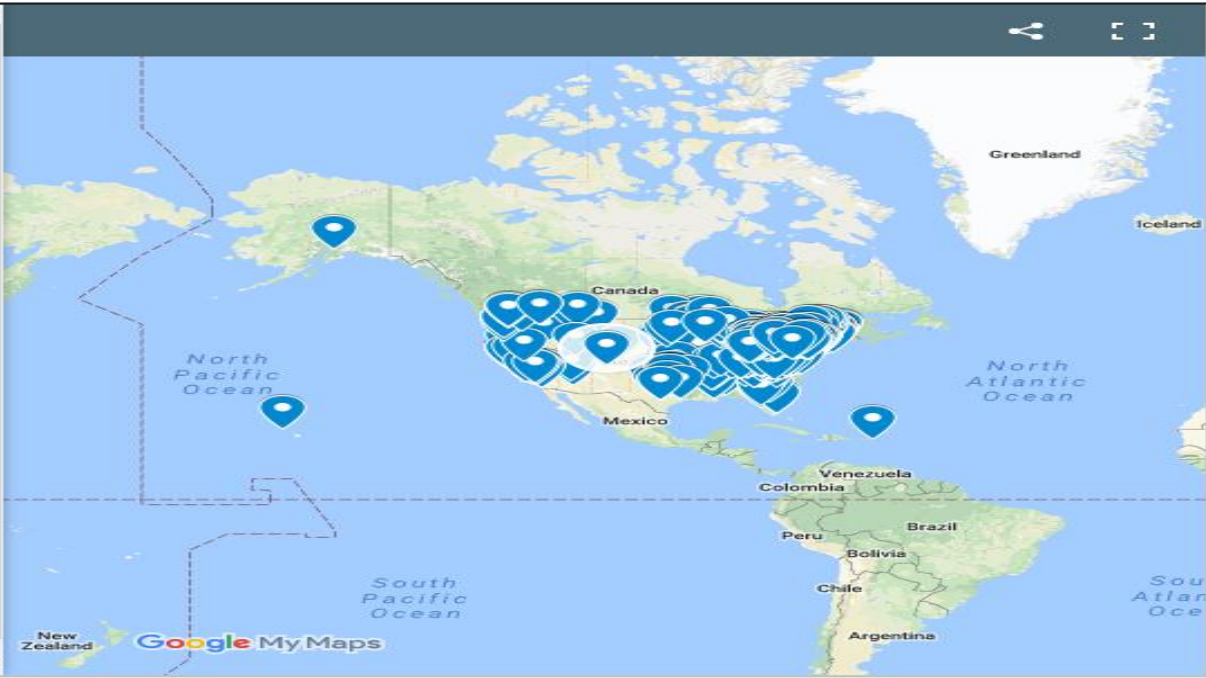
← Western State Colorad Univ... →

name
Western State Colorado University


Details from Google Maps
600 S Adams St, Gunnison, CO 81231
+1 800-876-5309
www.western.edu
4.5 ★★★★★
[View in Google Maps](#)



19 photos from Google Maps



Google My Maps



34 LET'S RECAP

- 2017 - 18 Recipient Review
- 2018 -19 Approval and Processing
- TE Reports
- TE Central Updates
- Recap