**New Year Checklist**

**Institution Account Review and Updates**

* Attend Mandatory Training – by registering using the link below. <https://attendee.gotowebinar.com/rt/115147878390049038>

Until Mandatory Training is completed by the primary TELO, your Enrollment Report is not available. Updating each school’s record for Mandatory Training attendance is a manual process. The 2022-23 Enrollment Report is not necessary until mid-August. Thank you for your patience.

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 Liaison Contact, and backup is current

 Institution Account Institution Information – right side

 If updates are required, be sure to email Janet with the changes. jhanson@tuitionexchange.org

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

r Confirm 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 user fees. Questions about dues and fees payment, contact Kristine Lev at klev@tuitionexchange.org

**Application Review and Updates**

**Application & Enrollment Report**

r Review **Export** Applications (new)

 Update any remaining 22-23 Decision Pending Applications to WITHDRAW

 *Export schools always withdraw applications*

r Review **Import** Applications (new)

 Update any remaining 22-23 Decision Pending Applications to DENY

 *Import schools always deny applications*

**Enrollment Report**

r Confirm that all 22-23 Approved 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 TE Liasion Officer. See below for instructions on how to update the expiration date.

r Review the *Enrollment Report* confirming that all continuing 22-23 Export student's parent/spouse/partner remains an eligible employee

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

 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 not correct, please email Janet (jhanson@tuitionexchange.org) to update the record. Please include the TE ID, the student's full name, and the new expiration date.

**Adding New Students to the 2022-2023 Enrollment Report**

**Import Schools**

r For each approved 2022-23 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 22-23 students to your Enrollment Report**

**Export Schools**

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 2022-2023 Section.

Click on the student's name, scroll to the bottom and click ADD STUDENT. On the next page, click on Fall, 2022. 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 At the bottom 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.