

End of year closeout Tuition Exchange – June, 2015

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JUNE 25, 2015

Today's focus

TE Closeout

Review 2014-15 Annual Report

Dues and Participation Fees

Claiming 2015-16 students

TE News and updates

Recap

TE Closeout

Review your 2014-15 Annual Report

- Issues to review
 - Confirm that all funded TE recipients are listed
 - Confirm all eligible students recertified
 - Hint: Recertify means NEEDS TO BE
 - Hint: Recertified means DONE!
 - Review graduation dates
 - If incorrect email Janet the following information:
 - Student's last name, TE id (last 4 ssn) and Importing school
 - Confirm all 2014-15 IMPORT recipients were awarded TE funds at your school
 - Check with Financial Aid Office and/or Student Accounts Office
 - Confirm that all paid TE award recipients are listed
 - E/I 3 schools – be sure to mark up to three E/I 3 recipients
 - DC 3 schools – confirm all information remains correct



2014-15 Annual Report Review - Import

Is the student's name correct? Be sure to include first and last name

Is the TE ID correct? Typically the last 4 of the student's ssn. Can be a series of any 4 numerical digits

| Imports for 2014-2015 | | | | | | |
|-----------------------|-------|--|------------|-----------|------------------|--|
| Name | TE ID | Exp. Inst. | Start Date | Exp. Date | Semeste Remainir | |
| Dodson, Testing | 1375 | TE TEST SITE | 9/1/2014 | 6/1/2019 | 9 | |
| Doe, John J | 1111 | TE TEST SITE | 9/1/2014 | 6/1/2018 | 7 | |
| Test, Testing | 0123 | XP - Associated Colleges of the South - XP | 1/1/2015 | 6/1/2019 | 9 | |

DC 3 imports show up on the Import side of the Annual Report

Is this the correct EXPORTING School?

Confirm that these are correct!

2014-15 Annual Report Review - Import

Common questions???

The expiration date (aka graduation date) is wrong

- Email Janet with student's TE ID, the correct date

The student is showing up in the wrong category

- Email Janet with the student's TE ID, the Import and Export school, and the correct student category

The student (and family) may not be receiving TE scholar notifications

- Today the email messaging is limited
 - If the email address is empty today please be sure to add a valid email addresses
 - Editing – Student
- Beginning with 2016-17 all students (and parent) will receive a series of email notifications
 - These will be shared in advance
 - Every effort will be made to make the generic emails informative
 - TELO's must add, update, review all current email addresses for this to work
 - Editing - Student

2014-15 Annual Report Review - Export

| Exports for 2014-2015 | | | | | | | | |
|-----------------------|-------|--------------|------------|-----------|---------------------|--------------------------------------|-------------------------------------|----------------------|
| Name | TE ID | Imp. Inst. | Start Date | Exp. Date | Semesters Remaining | EI3 for 2014-2015 | | Re-certify 2015-2016 |
| odson, net | 1234 | HBP | 9/1/2014 | 1/1/2015 | 0 | Yes <input type="radio"/> | No <input checked="" type="radio"/> | n/a |
| elds, Test | 1234 | TE TEST SITE | 9/1/2014 | 6/14/2018 | 7 | Yes <input checked="" type="radio"/> | No <input type="radio"/> | Re-certified |
| olman, est | 1234 | TE TEST SITE | 9/1/2014 | 1/1/2016 | 2 | Yes <input type="radio"/> | No <input checked="" type="radio"/> | Re-certify |

Correct Importing school?

Is this information correct?

E/I 3 school requirement

Notice the difference?

2014-15 Annual Report Review - Export

Common Questions???

The number of eligible semesters is not correct

- Double check the start and expiration dates for correctness
- Need correcting? Contact Janet with student's TE ID, updated start and/or expiration date

The student is not returning second semester to the IMPORT school listed

- Editing – student – click on the student – update the student's record by clicking DROP STUDENT
 - This re-sets the student's expiration date to the end of that term

The student did not enroll anytime during the current year at the IMPORT school listed

- Editing – student – click on the student - update the student's record by clicking DELETE STUDENT
 - This action removes the student from your school's database

The student is transferring to another TE school for second semester

- This will require creating a second record for the student
- Contact Janet for assistance with this process

2014-15 Annual Report Review - updates

Graduation Updates

- Email Janet with Student's TE ID (4 digits) and new graduation date

Name Updates

- Use the Editing feature and be sure to hit submit
- Please provide the full name – first and last

E-mails

- TE Central will unveil a new email notification system for 2015-16
 - It will be applied to applicants and continuing TE recipients
- Be sure to report, add and/or update email addresses using the Editing feature

Mid-year enrollment changes

- Use Editing feature to update the student's status
 - DROP – means student attended your school during the current school year but is no longer enrolled or will not return for the following academic year
 - DELETE – means student never attended your school and you want to eliminate the student from your school record

Editing a student record - Export

Students

| | |
|-----------------|--|
| TE ID | 1234 |
| Last Name | dodson |
| First Name | janet |
| Address | 3 Bethesda Metro Station Bethesda, MD 20814 |
| Email | jkhd76@gmail.com |
| Parent | C Norman Hanson |
| Parent Email | jdodson@tuitionexchange.org |
| Entry Class | Freshman |
| Entry Semester | Fall 2014 |
| Student Expires | Winter 2015 |

Program Option Traditional Double Credit Program (\$35 fee) [What is this?](#)

Importing Institution (School Student will Attend)
HBP (XP)

Submit Info Drop Student

Delete Student

One big change to the TE System! Only the Exporting school is able to update the student's IMPORTING Institution. Exporting schools are no longer able to select their school from the drop down box. Importing school cannot add the student to the system

Beginning 2016-17 valid emails will be important details to add to the system

Adding a Double Credit 3 record

Students

Last Four Digits of SSN or another number that is unique to the student

Last Name

First Name

Address

Email

Parent

Parent Email

Eligible Semesters
Slide Number

Entry Class

Entry Semester Fall 2015 Winter 2016

Program Option Traditional Double Credit Program (\$35 fee) [What is this?](#)

Exchange Program (program student exporting from)

For schools wishing to increase their ability to export, DC 3 may be the answer. If your school belongs to another TE recognized exchange program – use this screen to report those imports

Want additional DC 3 program information – see the TE Handbook
It is not too late to add DC 3 students to your 2014-15 Annual Report

Adding a student record - Editing

Students

Last Four Digits of SSN or another number that is unique to the student

Last Name

First Name

Address

Email

Parent

Parent Email

Eligible Semesters
Slide Number

Entry Class

Entry Semester Fall 2015 Winter 2016

Program Option Traditional Double Credit Program (\$35 fee) [What is this?](#)

Importing Institution (School Student will Attend)

Only the Exporting (home) school can add a new student record
The more information you provide the better communication can be for all

This is the best place to add your Double Credit Program students

Dues and Participation Fees - Dues

Dues and Fees Invoices
Membership Dues
Participation Fees Statement

2015-16 Membership Dues Invoice is available now

Membership dues are due July 1 and are \$500

We are not able to process electronic payments at this time

However, if you have questions about ACH or Direct Deposit options contact Kristine at klev@tuitionexchange.org

Dues and Participation Fees - PFees

Dues and Fees Invoices
Membership Dues
Participation Fees Statement


- For 2015-16 PFees Invoices are a part of your Annual Report and available after your Annual Report is submitted (it is due October 30)
- Today you are unable to print your PFee invoice – it will be available in early September
- We are unable to process electronic payments at this time
 - However, if you have questions about ACH or Direct Deposit options contact Kristine at klev@tuitionexchange.org
- TE Central will review the PFee invoice process during our September Completing your Annual Report Webinar

Claiming 2015-16 TE students

Review your Export (home) students

- Is the individual's application approved by at least one school?
- Is that the TE school where the student will enroll?
- Follow-up with parent – where is the student intends to enroll Fall, 2015?
- Withdraw all applications where the student is not attending by clicking the ENROLLED check box and then submit

| | |
|-----------|-------------------------------------|
| Enrolled: | <input checked="" type="checkbox"/> |
| Decision: | Approved |



- Do this process as soon as possible and no later than August 15
- By doing this you help clean-up the entire system!

Claiming the 2015-16 TE students

Review your Import (visiting) students

- New students
 - Is the student's TE application Approved?
 - If not, contact the TELO at the Exporting (home) school
 - Confirm with Admissions the TE approved student is accepted at your school and plans to enroll this academic year
 - Make sure the Financial Aid Office knows the student is a TE recipient
- Continuing students
 - Has the student's TE application been recertified?
 - If not, contact the TELO at the Exporting (home) school
 - Confirm with Financial Aid and/or Registrar that the student meets your renewal requirements
 - Make sure the Financial Aid Office knows the student is a TE recipient

HINT: Remember to keep the student informed along the way

Claiming the 2015-16 TE students - NEW

| | |
|--|--|
| Decision:* | <input checked="" type="radio"/> Approved <input type="radio"/> Rejected <input type="radio"/> Wait List <input type="radio"/> Withdrawn |
| Tuition Offer:* | <input type="radio"/> N/A <input type="radio"/> Full Tuition of . . . <input checked="" type="radio"/> "Set Rate" amount of . . . <input type="radio"/> Other amount of . . . \$ <input type="text" value="33000"/> Must be a number |
| Comments: | <div style="border: 1px solid #ccc; height: 100px;"></div> |
| Enrolled: | <input type="checkbox"/> |
| <input type="button" value="Submit"/> (Update application) | |

Decision definitions

- **Approved** means the Import School will offer the student the TE award
- **Reject** means EITHER the student declined the offered TE award OR the School will not offer the student a TE award
- **Wait List** means the student is considered to be an eligible TE recipient but your spots are full.
- **Withdrawn** – is not available to new students

Claiming the 2015-16 TE students - NEW

| | |
|--|--|
| Decision:* | <input checked="" type="radio"/> Approved <input type="radio"/> Rejected <input type="radio"/> Wait List <input type="radio"/> Withdrawn |
| Tuition Offer:* | <input type="radio"/> N/A <input type="radio"/> Full Tuition of . . . <input checked="" type="radio"/> "Set Rate" amount of . . . <input type="radio"/> Other amount of . . . \$ <input type="text" value="33000"/> Must be a number |
| Comments: | <div style="border: 1px solid #ccc; height: 50px;"></div> |
| Enrolled: | <input type="checkbox"/> |
| <input type="button" value="Submit"/> (Update application) | |

Tuition Offer

If Approved must be Full Tuition or Set Rate or Other amount between full tuition (and/or other fees) and the optional Set Rate

Be sure to explain this to your TE families

If Rejected the Tuition offer defaults to N/A

Optional Set-Rate for 2016-17 is set at \$34,000.

Claiming the 2015-16 TE students - NEW

| | |
|--|--|
| Decision:* | <input checked="" type="radio"/> Approved <input type="radio"/> Rejected <input type="radio"/> Wait List <input type="radio"/> Withdrawn |
| Tuition Offer:* | <input type="radio"/> N/A <input type="radio"/> Full Tuition of . . . <input checked="" type="radio"/> "Set Rate" amount of . . . <input type="radio"/> Other amount of . . . \$ <input type="text" value="33000"/> Must be a number |
| Comments: | <div style="border: 1px solid gray; height: 50px; width: 100%;"></div> |
| Enrolled: | <input type="checkbox"/> |
| <input type="button" value="Submit"/> (Update application) | |

In this box be sure to provide an explanation of the Other Amount of...this quick explanation will help the TELO at the "other" school when the family asks them about the award

Communication is the key...

Maximizing your TE award and institutional dollars

| | School A | School B | School C |
|------------------------|----------|----------|----------|
| TE Award | 29500 | 29500 | 16500 |
| Federal Pell Grant | 0 | 2000 | |
| State Grant | 0 | 1500 | |
| Institutional Awards | 0 | 0 | 10000 |
| Academic scholarships | | | |
| Special Ability grants | | | |
| Other | 0 | 0 | 1000 |
| Tuition | 29500 | 33000 | 27500 |
| Difference | 0 | 0 | 0 |

Communication is the key – families need to be told how your school treats other dollars the student is eligible to receive

Claiming the 2015-16 TE Students - NEW

| | |
|-----------------|--|
| Decision:* | <input checked="" type="radio"/> Approved <input type="radio"/> Rejected <input type="radio"/> Wait List <input type="radio"/> Withdrawn |
| Tuition Offer:* | <input type="radio"/> N/A <input type="radio"/> Full Tuition of . . . <input checked="" type="radio"/> "Set Rate" amount of . . . <input type="radio"/> Other amount of . . . \$ <input type="text" value="33000"/> Must be a number |
| Comments: | <div style="border: 1px solid gray; height: 50px; width: 100%;"></div> |
| Enrolled: | <input checked="" type="checkbox"/> |
| | <input type="button" value="Submit"/> (Update application) |

Final and most important step!
Click on the Enrolled box and Submit

This step moves the student to your 2015-16
Annual Report

Let's take time to review any audience questions



We will do our best to answer your questions. If a question is too specific a member of the TE staff will be in touch with you directly after the webinar. All questions will be responded to in a Q and A document. The document will be posted inside the TE Only Resource portal

TE News and Updates

Optional Set-Rate for 2016-17 is \$34,000

Summer projects include

- Updating Emails to families, students and TELO's
- Creating snippets to help TELO's with specific questions
- Updating the TELO Only Resource section to your email rather than a generic sign-in

Family Brochures, Table tents and folders are available complete the order form inside the Liaison tab – TELO 5th article down

TE Materials Order Form

Tuition Exchange offers our members the following marketing materials. Family brochure - this brochure was updated Spring, 2015. The brochure is a tri-fold document offering quick general facts about TE. A great . . . [read more](#)

TE News and Updates

TE Central is building our database and we need your help

- Soon an email will be sent to the primary TELO asking for the names and email addresses of:
 - Human Resource Director
 - Financial Aid Director
 - Admissions/Enrollment Management Director
 - President

Thank you for helping build TE Central this important communication link

Webinar training is on hiatus in July

Beginning in August, a member of the TE Staff will be calling all TELO's for feedback. We look forward to chatting with you in August and September. We understand your time is valuable and as such our conversations will be to the point

Recap

TE Closeout

Review 2014-15 Annual Report

Dues and Participation Fees

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TE News and updates

Thank you for attending



See you August. Stay cool!