



TUITION EXCHANGE SEPTEMBER 2017 WEBINAR

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Today's focus

- Keeping 2018-19 applications up to date
- Confirmation and clean-up of 2017-18 applications
- Tuition Exchange Bloopers and Blunders

Keeping 2018-19 applications up to date

- EZ app school
- TELO entering applications on TELO portal

Keeping 2018-19 applications up to date

- Using the EZ app
 - *Congratulations you just freed up time and data entry energy*
 - *Emails keep you in the know*
 - *Families can monitor the status of their EZ applications*
 - *The Export TELO controls the certification process*

Keeping 2018-19 applications up to date

EZ Online Application

Application recorded successfully to AIB College of Business - IA.

Your Tuition Exchange application recently submitted for Tuition Exchange consideration is now recorded in the system and awaiting Export school approval.

Once the family clicks submit, the message is immediately displayed. The EZ application is recorded at the Employer school. Please remind employees TE is not possible at the home school.

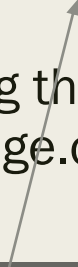
Keeping 2018-19 applications up to date

- Tuition Exchange (The) has submitted an application to your institution for test tester. Please review the application online at: <http://telo.tuitionexchange.org/liaison/> If you have a problem accessing this application, please forward this e-mail to <mailto:jdodson@tuitionexchange.org> (Application ID: 291445)

The email is sent from a NOREPLY address.
Please add the email address to your safe list.

Do not share this email with the family.
The link does not take them anywhere
and causes confusion for all

Check out the body of the
email. You know the name
of the student.



KEEPING 2018-19 APPLICATIONS UP TO DATE

Initial email sent to the
EMPLOYEE informing the
employee of next steps.
The email launches
immediately after the app
is submitted

9/20/2017



Dear Norman,

Your EZ application is now recorded and await your employer's approval. The next step is for your employer to review the EZ applications for eligibility. Your employer will approve or deny the EZ applications. You will receive email updates as action occurs regarding your EZ application throughout the process. If you have questions about the status of your dependent's applications, please use the Application Status option inside the Families tab.

All approved EZ applications post with the school(s) listed on your student's EZ application. If you have questions regarding denied EZ application, email the first individual listed below .

If you discover errors in your EZ application after submitting, send an email to the first individual listed below. Be sure to share your student's ID and full name, the error and the CORRECT information. If the error can be updated by your employer, the EZ application will be modified. If the error is not one that can be updated, you will be instructed to start again. If you want the EZ application sent to additional schools, that requires a NEW EZ application.

The Search function on the website provides a host of useful information. Before contacting schools where your student is considering attending, review the website. The information is posted and maintained by the school.

Thank you for using the EZ application process.

Liaison Officer

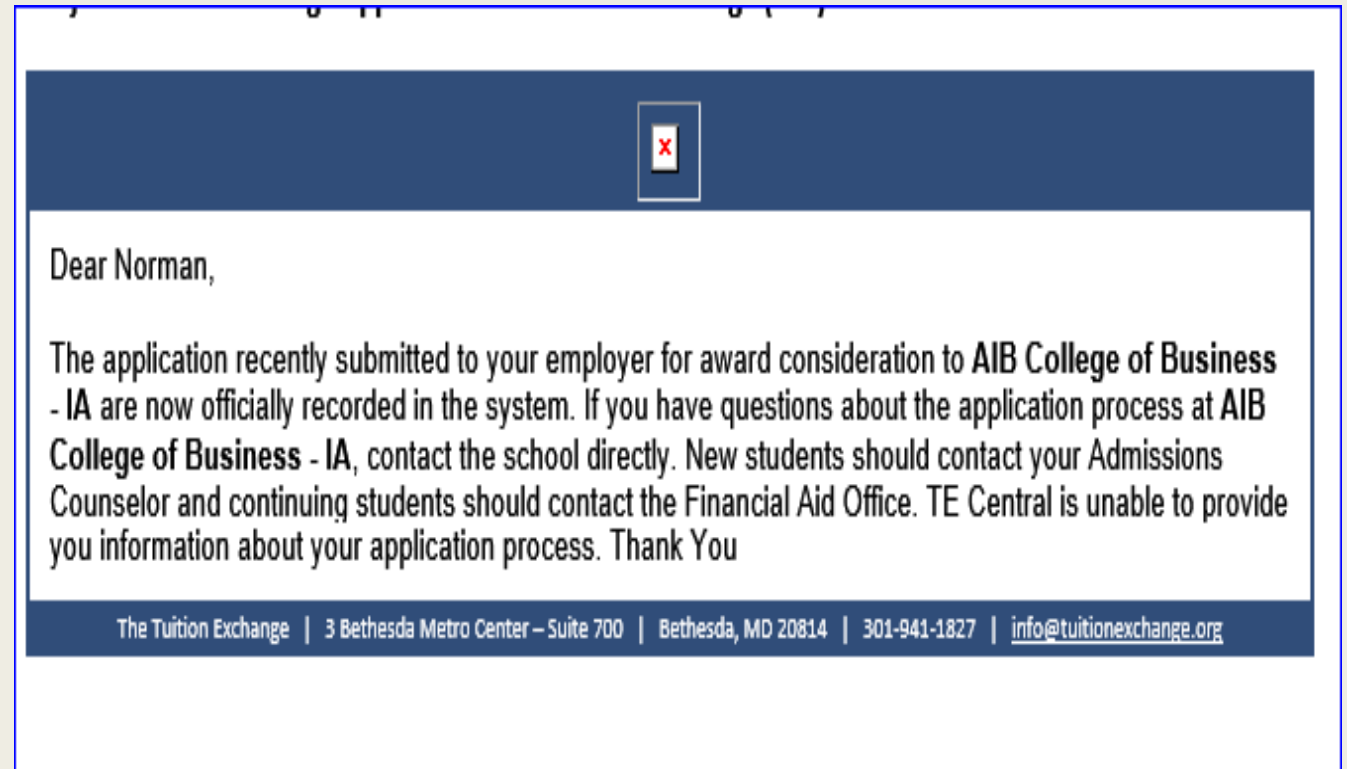
Mr. Robert Shorb
Tuition Exchange (The)
3 Bethesda Metro Center, Suite 700
Bethesda, MD 20814

jdodson@tuitionexchange.org

Hay@tuitionexchange.org robertshorb@tuitionexchange.org

Keeping 2018-19 applications up to date

This email is sent to the EMPLOYEE informing the family the EZ application is approved for Export.



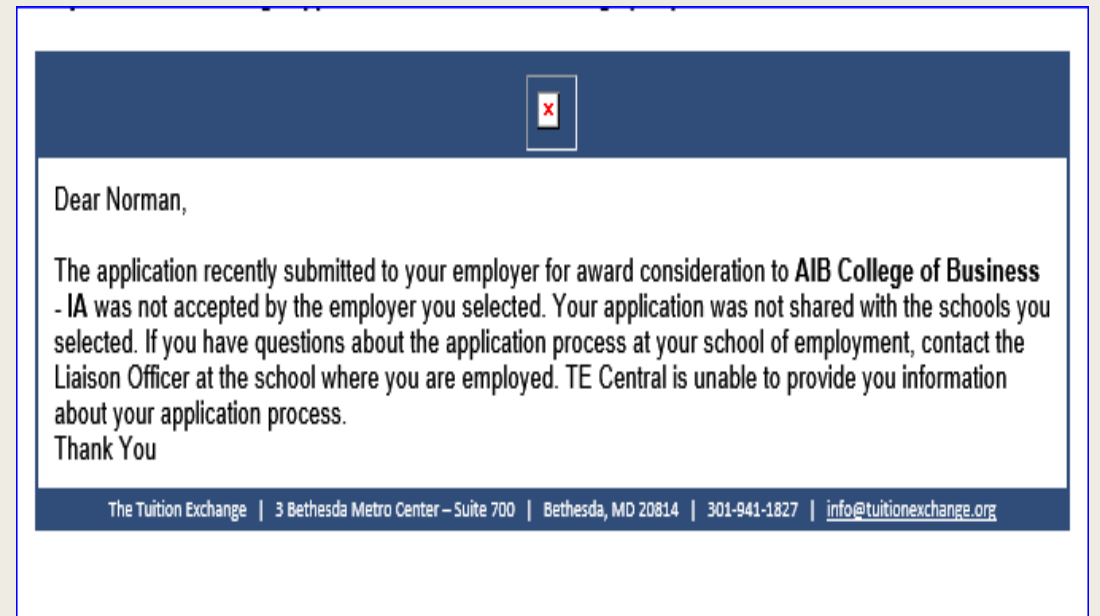
Dear Norman,

The application recently submitted to your employer for award consideration to **AIB College of Business - IA** are now officially recorded in the system. If you have questions about the application process at **AIB College of Business - IA**, contact the school directly. New students should contact your Admissions Counselor and continuing students should contact the Financial Aid Office. TE Central is unable to provide you information about your application process. Thank You

The Tuition Exchange | 3 Bethesda Metro Center - Suite 700 | Bethesda, MD 20814 | 301-941-1827 | info@tuitionexchange.org

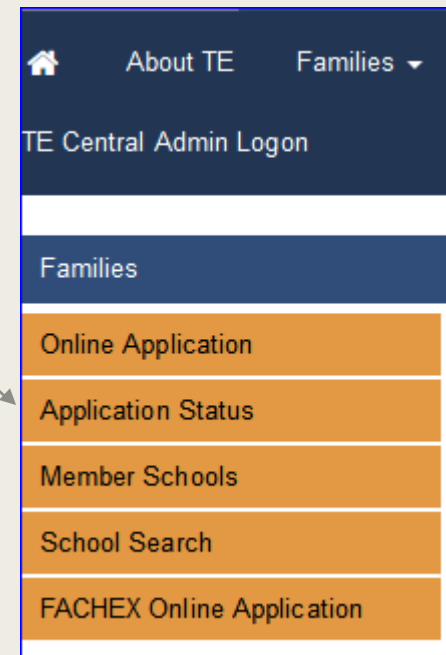
Keeping 2018-19 applications up to date

- Families don't always read directions or utilize the self-help tools provided.
- This email tells the EMPLOYEE the application was denied by the employer selected.
- The email directs the family to contact their TELO. As a reminder, the family may have selected the wrong school as their employer.




Keeping 2018-19 applications up to date

- Families can monitor their dependent's application status – again freeing up your time and energy



Keeping 2018-19 applications up to date

Please enter the following information to check on the status of your application(s).

Last 4 SSN* Birthdate* 

MM/DD/YYYY format

Email*

[Check Application Status](#)

The information entered here is applicant information. Encourage families to review the power point provided or better yet listen to the 9 minute webcast.

The information must match perfectly. It is amazing how families don't enter the details correctly. TE Central receives roughly 10 calls weekly asking for a copy of their application. Since Personal Identifiable Information (PII) is involved – TE Central refuses to assist. We encourage them to contact their EXPORT TELO.

Keeping 2018-19 applications up to date

Student	Exporting School	Attending School	Status
Dodson, Janet	Tuition Exchange (The)	AIB College of Business - IA	Application Denied
dodson, janet	AIB College of Business - IA	Tuition Exchange (The)	Awaiting Export School Certification
dodson, janet	TE Test Fachex	TE Test Fachex	Withdrawn
Dodson, Janet	XP - International Association of Baptist Colleges & Universities	Tuition Exchange (The)	Import School Approved, Awaiting Enrollment
dodson, janet	TE Test Fachex	TE Test Fachex	Withdrawn
Jones, Caroline M	Tuition Exchange (The)	HBP	Withdrawn
Student, Student	AIB College of Business - IA	Cedar Crest College - PA	Application Denied
Student, Student S	Tuition Exchange (The)	Abilene Christian University -TX	Application Denied
Student, Student S	Tuition Exchange (The)	Adelphi University - NY	Application Denied
Student, Student S	Tuition Exchange (The)	Adrian College - MI	Application Denied
Student, Student S	Tuition Exchange (The)	Agnes Scott College - GA	Application Denied
Student, Student	AIB College of Business - IA	Baylor University - TX	Application Denied

Each EZ application has a status. It is important for you to communicate the approval timeline with your employees.

Keeping 2018-19 applications up to date

- The EXPORT TELO's control the process because only you can APPROVE or DENY the EZ app!

2018 - 2019						
Date	Applicant	TE ID	Imp. Inst	Year	EZ App	EZ App Certified
09/07/2017	tester, test	1111	TE Test Fachex	2018 - 2019	Yes	Awaiting Export School Approval

The student application above requires EXPORT TELO attention. To open the record, click on the student's name. Now either Approve or Deny the application for Export!


Should the family want a copy of the application click print now

Application

Print Now

This application was submitted by the Parent or Student and must be approved to proceed to the importing school.

CERTIFICATION

Approve Deny 

School Year: 2018 - 2019

Submit Date: 09/07/2017

Keeping 2018-19 applications up to date

Exports - Decision Pending						
2018 - 2019						
Date	Applicant	TE ID	Imp. Inst	Year	EZ App	EZ App Certified
09/07/2017	tester, test	1111	TE Test Fachex	2018 - 2019	Yes	Yes

When the EZ app is approved for Export the record looks like this

Exports - Rejected						
2018 - 2019						
Date	Applicant	TE ID	Imp. Inst	Year	EZ App	EZ App Certified
09/07/2017	tester, test	1111	Tuition Exchange (The)	2018 - 2019	Yes	No

When the EZ app is denied for Export the record looks like this


Keeping 2018-19 applications up to date

- As you receive notification of new EZ apps please take action
 - *Approve means the employee meets your EXPORT eligibility guidelines*
 - *Deny means the employee does not meet your EXPORT eligibility guidelines*
- *If your school has an application deadline share it!*
 - Institution Account – then Institutional Information
 - Don't have an application deadline list the first day of school next fall
 - The date is shown on the EZ app for employees to see
 - A date in the past does not stop the EZ app but may help the family realize their EZ app is late

School Info

Accepting new students? Yes No

Accepting online applications? Yes No

Application Deadline 

Confirmation and clean-up of 2017-18 applications

- The Annual Report is your TE scholarship export and import confirmation
- The report is due September 30
- The Annual Report instructions are up to date and provide answers to many questions asked daily
- Once the Annual Report is submitted, your Participation Fee invoice displays
- Your Participation Fee invoice payment is due upon receipt
- You can submit your Annual Report as many times as you feel the need

Confirmation and clean-up of 2017-18 applications

- Review your Annual Report – who is missing?
 - *Most likely NEW Imports and Exports*
 - *August, 2017 webinar only topic focus – click the link below to listen*
 - <https://attendee.gotowebinar.com/recording/5019832815850568973>
- Imports click the Enrolled Box
 - *By clicking the Enrolled box an email is launched to the EXPORT school*
- ONLY the Export school can ADD STUDENT

Confirmation and clean-up of 2017-18 applications

Tuition Exchange (The) has marked j dodson as enrolled. By enrolling the student, all other approved applications for this student have been withdrawn. You may now add the student by viewing the application and clicking "Add Student".

Please review the application online at:

<http://telo.tuitionexchange.org/liaison/>

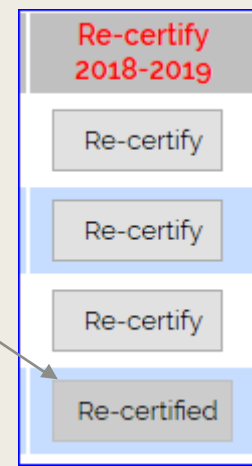
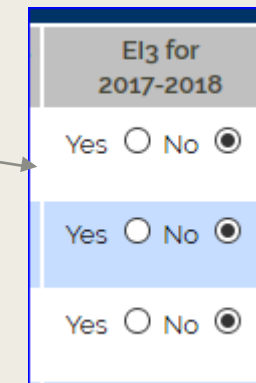
If you have a problem accessing this application, please forward this e-mail to

jdodson@tuitionexchange.org (Application ID: 288481)

This email tells the EXPORT TELO to ADD STUDENT. Until the EXPORT School adds the student, the student does not show up on your 2017-18 Annual Report. PLEASE be prompt!

Confirmation and clean-up of 2017-18 applications

- E/I 3 schools – not sure if you signed up for E/I 3?
 - *Be sure to select three NEW exports annually*
- EXPORT Schools click the Re-certify 2018-19 button
 - *Can only click once and the word Re-Certify changes to Re-CERTIFIED once clicked*
 - *Clicking the Re-Certify button moves the student details forward to the 2018-19 database*



Confirmation and clean-up of 2017-18 applications

The basic tuition for 2017-2018 academic year:	\$ <input type="text" value="123.00"/>
Value of your Tuition Exchange Scholarship for 2017-2018:	\$ <input type="text" value="123.00"/>
Total number of extra credits for full room for 2017-2018:	<input type="text" value="0"/>
Double Credit (DC3) Import Credits 2017-2018:	+0 (0 Students)
Your e-mail address:	<input type="text" value="jdodson@tuitionexchange.c"/>

Be sure to provide the exact tuition charged all students or weighted average if tuition charges vary by student or program. Your Financial Aid Office can provide this information.

The value of your TE scholarship may be different than your basic tuition charge. Again, your Financial Aid Office can help if you are uncertain.

Extra credit for room is now one (1) credit per semester!

Be sure to click SUBMIT

Confirmation and clean-up of 2017-18 applications

The Tuition Exchange, Inc.
Participation Fees Invoice for 2017-2018 Academic Year
Due Upon Receipt

Mr. Robert Shorb
Executive Director/CEO
Tuition Exchange (The)
3 Bethesda Metro Center, Suite 700
Bethesda, MD 20814

Fee Type	Amount	
Participation Fees	\$240.00	(6 exported students)
Double Credit Participation Fees	\$0.00	(0 double credit students)
Fees Paid	\$120.00	
Balance Due	\$120.00	

If your school submits payment via ACH please email Kristine Lev when your ACH payment is launched. ACH details provided by your financial institution is not always clear about the name of your college

Confirmation and clean-up of 2017-18 applications

5 Year Subtotal	17	18	-1
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Calculating your TE Standing:
X(number of imports) -Y(number of exports) - Z (may be a positive or negative number)
Z/X - A% (may be a positive or negative number)

Messages:

- In good standing due to E/I 3
- **Your institution is in good standing, CONGRATULATIONS!**

Good standing -any positive % to a -59%
Alert standing --60% to -99%
Restriction --100% and beyond

Once you submit your Annual Report, the Balance sheet becomes available. Be sure to review the Balance sheet carefully and read the messages

Confirmation and clean-up of 2017-18 applications

- Application clean-up is an important task
 - *Once your annual report is complete*
 - Make sure all your Exports Decision Pending for 2017-18 are withdrawn
 - Make sure all your Import Decision Pending for 2017-18 are denied
 - If an approved IMPORT does not enroll – update the status to DENY
 - *DENY is a multi-use word In this case the student denied your school their enrollment*

Exports - Withdrawn						
2017 - 2018						
Date	Applicant	TE ID	Imp. Inst	Year	EZ App	EZ App Certified
01/22/2017	Jones, Caroline M	1234	HBP	2017 - 2018	No	No
Exports - Approved						
2017 - 2018						
Date	Applicant	TE ID	Imp. Inst	Year	EZ App	EZ App Certified
08/09/2017	Henry, George	5858	AIB College of Business - IA	2017 - 2018	No	No
01/22/2017	Lange, Cameron L	1234	HBP	2017 - 2018	No	No
Exports - Decision Pending						
2017 - 2018						
Date	Applicant	TE ID	Imp. Inst	Year	EZ App	EZ App Certified
10/19/2016	Test, Testing	3333	HBP	2017 - 2018	Yes	Yes

Confirmation and clean-up of 2017-18 applications

- Be sure to print and save every time you submit your Annual Report and Balance Sheet
- TE Central captures at the end of year only the final Annual Report and Balance Sheet
- The Annual Report and Balance Sheet are organic
 - *it is difficult to track what changed without a copy of the documents submitted previously*
- Mark your calendar today to remind you to review your Annual Report at the end of first term, start of the second term, and finally after the end of your Spring term.
 - *Keep a copy of each report you review*
- TE Central is unable to reproduce any Annual Report

Blunders and Bloopers

- TE Central appreciates all questions asked by schools and families;
- The next following section is developed to help better understand how misconceptions occur; and
- Thank you for all that you do to promote higher education.
- So hypothetically speaking, lets tackle the Blunders and Bloopers...

Blunders and Bloopers

■ Parent conversations

- *I work at The School of Janet and my wife will be using my TE benefit – how does this work?*
- *My dependent is enrolled at The School of Janet – where is the rest of my \$35,000 benefit payment?*
- *My TELO is new – I don't trust her information. What are the guidelines so I know how to get the best bang for my TE benefit?*
- *I completed the EZ app, but I don't remember the names of the schools selected. Please send me the application so I can make sure I did it right.*
- *How come I won't know about my dependent's award until April? I applied in August.*
- *Why isn't my dependent's TE award the full tuition amount? I was told by my TELO, and I trust her, that I would get full tuition.*

Blunders and Bloopers

- Parent conversations continued

- *I work at the School of Janet and my spouse works at the School of Bob. We will complete applications at each school so that my dependent's application is twice as likely to be selected.*
- *What is this balance thing. TE is a benefit – I don't care if my school is out of balance. That is not my problem!*
- *I completed the EZ app but my school can't find it. Where is it?*
- *My student's app status doesn't show. Why doesn't your system tell me what I need to know?*
- *My dependent only received denial notices. What happened to the promise of TE? My export school told me I was eligible.*

Blunders and Bloopers

■ School questions and emails

- *I don't see Janet's application. Her mother told me she submitted it last night.*
- *Janet's mother calls me every day asking when the TE IMPORT applications will be approved. What is the timeline?*
- *Janet's mother received an email informing her the EZ app was denied. What gives, I didn't even approve it.*
- *I am the EXPORT TELO and somebody else on my campus is approving application without my knowledge. How is this happening?*
- *Janet's mom entered her birthdate and email address on the EZ app. But she doesn't remember which email she entered. Can you tell me what email was entered?*
- *I don't want to use the EZ app. How do I turn the EZ app function off for my school?*

Blunders and Bloopers

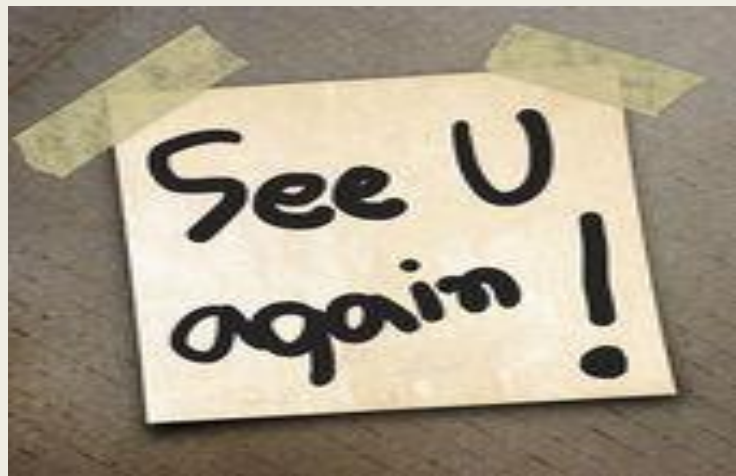
- School questions and emails continued
 - *Help! I have Import students on my Annual Report as Exports.*
 - *Why don't my new students show up on my Annual Report?*
 - *Hey, where are continuing students Kristine and Duane? They are not appearing on my Annual Report. We are funding them again this year.*
 - *What exactly is E/I 3?*
 - *I don't understand DC 3?*
 - *How do I delete a record?*
 - *I don't want all these extra records on my View Applicant area any more. Can I delete them all now.*
 - *The application won't print. What's wrong?*
 - *I want to add more TELO access. How do I do that?*
 - *Why can't we have just one TELO access instead of individual access?*

Blunders and Bloopers

- School questions and emails continued
 - *How do you get into the TELO Only Resource Section?*
 - *I am the president's secretary and I need access to the system.*
 - *What is the Set-Rate?*
 - *We approve all employees seeking EXPORT as applications are received. Once we hit our limit, we will cancel those with less seniority and replace them with applications of employees with more seniority.*
 - *I want to modify your emails sent to parents. How do I do that?*
 - *The TELO left 2 months ago and now it is my job. What do I do?*
 - *You offer in-person training in odd places. You can come to my campus ok.*
 - *We charge employees the Participation fee. The individual employees will be sending you a check. What is the best address?*
 - *I need to pay by credit card.*

Let's Recap

- Keeping 2018-19 applications up to date
- Confirmation and clean-up of 2017-18 applications
- Tuition Exchange Bloopers and Blunders



Tune in next month when our topic is Marketing, Communications, Capacity, EZ app review, and Policy and Procedure updates.

<https://attendee.gotowebinar.com/register/7770956043723896577>



THANK YOU FOR ALL YOU DO TO PROMOTE HIGHER EDUCATION

Questions – please contact Janet at 402.418.1081 or
by email at jdodson@tuitonexchange.org

