

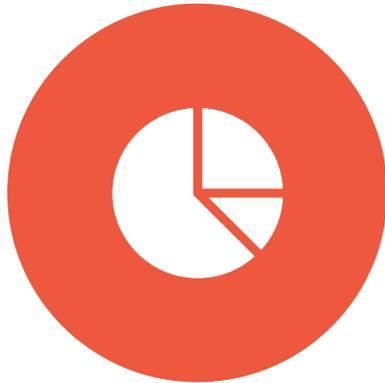
Navigating Tuition Exchange

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Today's Focus



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TELO PORTAL



OBLIGATIONS
CALENDAR, FINANCIAL, AND
GUIDELINES

TELO

BOARD

ADMIN



ABOUT TE ▼

FAMILIES ▼

LIAISON OFFICERS ▼

MORE...

www.Tuitionexchange.org

Please explore the Families section

Families Section

Contains – general news articles, shares an overview of the TE scholarship award process, provides a map of all member schools, and provides a printable listing of TE current member schools.



Below is a list of institutions participating in The Tuition Exchange. For school-specific information or to conduct a search based on your criteria, visit our [Search Member Schools](#) page.

[Click here for a printable list of participating institutions.](#)

United Arab Emirates

American University Sharjah - UAE

Switzerland

Franklin University Switzerland - SW

Morocco

Al Akhawayn University in Ifrane - MR

Greece

American College of Greece - GR

Louisiana (continued)

Louisiana Tech University - LA

Loyola University New Orleans - LA

New Orleans Baptist Theological Seminary

- LA

Tulane University - LA

Maine

Maine College of Art - ME

Saint Joseph's College of Maine - ME

University of New England - ME

North Carolina (continued)

Salem Academy & College - NC

St. Andrews University - NC

University of Mount Olive - NC

Warren Wilson College - NC

William Peace University - NC

Wingate University - NC

North Dakota

University of Jamestown

Ohio

Be sure to check out your institutions message by clicking on the name of your Institution.
Is the message friendly and complete?

Review your Institutional profile every term/semester

College Four EI3 School

Mandatory Training

- Institution Account +
- Enrolled Students +
- Applications +
- School Listings +
- Instructions +
- Special Programs and Options +

Institution Account

- Mandatory Institutional Profile
- Institution Information
- Account Information
- Enrollment Report (current)
- Enrollment Reports (previous)
- Balance Sheet
- Continuing Scholars
- Import/Export List
- Membership Dues

Make sure every question has a response. Not sure how to answer – visit with your colleagues in Admissions, Financial Aid, and Human Resources. The overview section found inside Institution Information allows you the opportunity to share information beyond the Member Survey

Example

Families see the details to your right when clicking on a specific school. The University of Jamestown does a great job providing useful information to potential students and their family.

Star one is controlled by the school.

Star two is calculated by the system. However, TE Central can modify the percentages somewhat. The options are

0 - 10% normally get an offer

11-40% normally get an offer

41-60% normally get an offer

61-90% normally get an offer

All or more qualified received an offer

Overview

Institution Name

University of Jamestown

Address

6085 College Lane
Jamestown, ND 58405

Liaison Officer

Judy Hager
TELO and Director of Financial Aid
jhager@uj.edu
amyers@uj.edu

School URL

<http://www.uj.edu>

In addition to freshmen, will make award offers to transfers and/or to students currently enrolled but not on TE (sophomores, juniors and seniors) for 2022-2023

Tuition amount: Full Tuition

Program: Undergraduate

Other date (post date on Overview box)

Deadline for the receipt of initial TE certification/applications:

In May 2022 or no deadline

The percentage of the new admitted TE candidates offered a TE scholarship for the current academic year:

41%-60%

Additional Information

University of Jamestown is a private, liberal arts university that offers a unique educational experience that we call the Journey to Success. Our approach focuses on you ? the student, your goals and your dreams. The Jamestown Journey offers our students an experience that other colleges don't. You will form life-long friendships on our campus and be challenged by professors who will call you by name.

No answer means your institutions name does not appear as a valid school for purposes of the TE EZ-app.



Families Section continued

TE EZ-App has three steps.

1. The eligible employee completes the online application selecting the school of employment and up to 10* individual member schools where the student is applying for admission next fall
2. The EXPORT TE Liaison Officer confirms the employee is eligible and approves* the EZ-App for consideration at each of the schools selected by the student
3. The IMPORT TE Liaison Officer reviews the application and approves* the student EZ-App for the TE Scholarship to attend the import school

Family misconceptions

1. The EZ-app is designed for a maximum of **10 applications**. If the student wishes to shop at more schools, she completes a NEW application listing only the new schools. If the student wishes to at any time add schools, the student completes a NEW application listing only the new schools. If the student is not longer interested in a previously selected school, the EXPORT TE Liaison Officer can **WITHDRAW** the application – be sure to add a note in the comment section
2. When my student's application is **approved by my employer**, my student will receive the TE benefit.
 - The application is only approved for the student to shop for funding at the selected schools
 - TE is not an employee benefit – rather an opportunity because your school is a member
3. Families shop, looking for the “best deal” and many students **do not complete the admissions** application process. TE Liaison Officers should share every NEW import bio information with the Enrollment Team for follow-up. Students should not be formally offered a TE scholarship until the student’s admission application is complete.

Families Section continued

EZ-App Emails

- Parent (employee) Approve, Deny, Status Change
- Student Approved or Status Change
- Export TE Liaison Officer Application filed, and any action taken on the application
- Import TE Liaison Officer Any action taken on the application

Families make mistakes on the EZ-App

- EXPORT TE Liaison Officer can update any item on the application in a white box
- IMPORT TE Liaison Officer can NOT update any item on the application
- TE Central will update upon request from either TE Liaison Officer only

Families Section continues

App Status provides families with a quick review of the status of each application in the system

- But as shared on slide 9 - families make errors
- The individual seeking information MUST complete the App Status details exactly as presented on the application
 - The reported information on the application, TEID, birthdate, and student email address MUST match EXACTLY in order to see application details
 - Parents contact TE Central asking for help. TE Central directs the individual back to the EXPORT TE Liaison Officer. The information is sensitive and TE Central has no way of confirming the individual should have access to the information.
 - Print a copy of the application and share it with the family for future review of the information

There is no RENEWAL application for the TE program.

- If the student is returning to the same school without an extended break DO NOT ask the student to complete a new TE EZ App. But...
- Should the parent move to a new job at a NEW member school, a new application is required or
- The student transfer to a new member school, a new application is required or
- The student drops out of school for more than one term/semester, a new application is required

Families Section continued

Continuing students can also track subsequent year application status

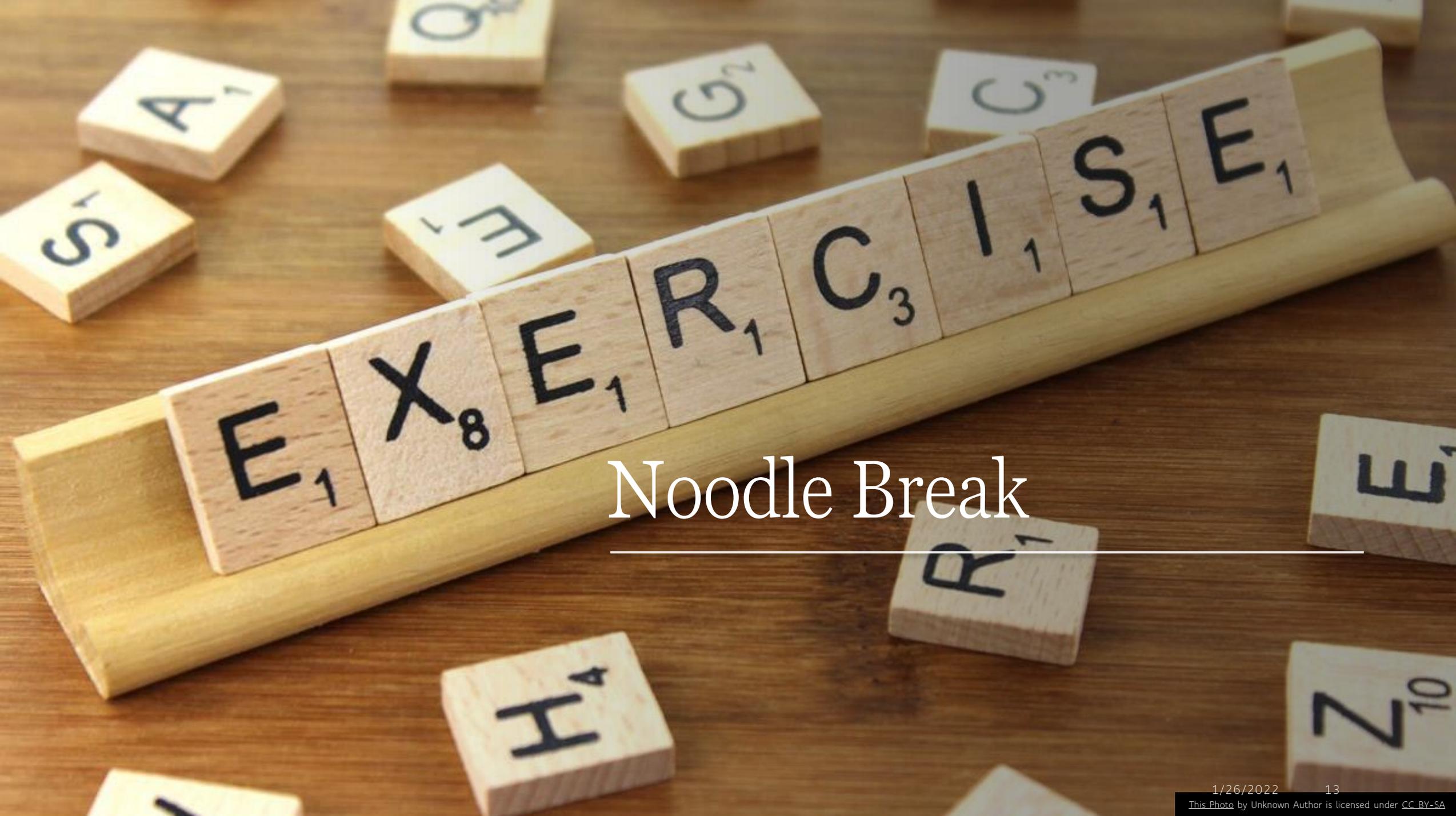
- The challenge for many continuing students is what email did I use when I originally completed the TE EZ App? Export TELOs can provide the student with that information by reviewing the current application in the Enrollment Report

A word of caution, many employees believe that if the EXPORT school has recertified their student's application for the following academic year, even if the parent leaves her position, the TE award is valid. Be sure your information is clear regarding employment and the TE scholarship

Families Section continued

Often the employee (parent) asks the EXPORT or IMPORT TE Liaison Officer specific questions about their student. UNLESS the school has on file from the STUDENT permission to talk to a named person (parent) do not share information

You are in violation of the Family Educational Rights and Privacy Act (FERPA). If you have any questions about FERPA at your school, please contact your Registrar.



Noodle Break

TE Liaison Officer section on the homepage

The website's home page offers TE Liaison Officers general information including announcements

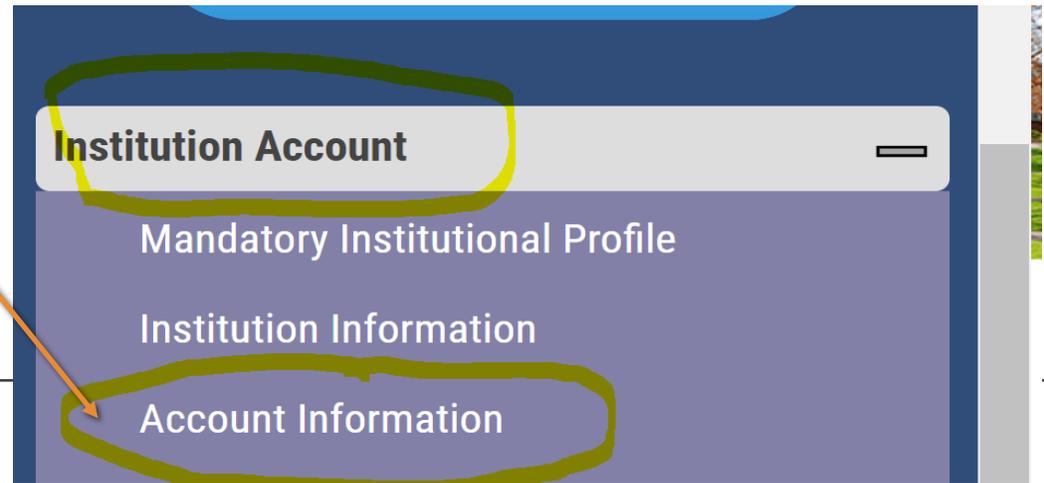
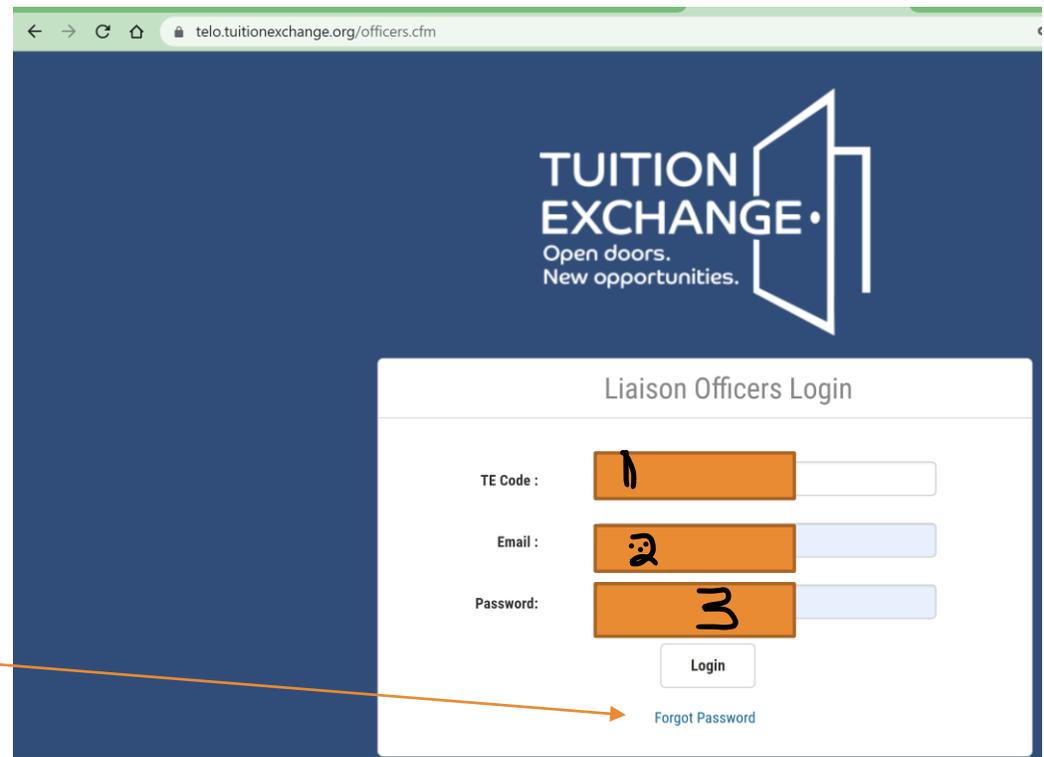


- Announcements include the 2022-23 TE-GO Scholarship information
- TE Liaison Officer Training 101 - 104
 - Four quick webinars
- 2021- 2022 TE webinars and supporting handouts
- Set-rate details
- Order form for free Tuition Exchange marketing materials



1. TE Code assigned by TE Central
2. User's email
3. Password selected by user. Requires a capital letter

If you can't remember your password, click FORGOT PASSWORD. An email from NOREPLY@ is sent with a new password to be used to login. Update your password, if you like, inside the Institution Account - Account Information



TE Liaison portal

TE Liaison Portal continues

Please take a moment to read the announcements!
Sometimes I hide a chance for you to earn a treat!

The screenshot displays the TE Liaison Portal interface. At the top right, it says "Welcome Administrator" with a "Logout" link. Below this is a banner image of students. The main content area is divided into three sections:

- Mandatory Training**: A dark blue header with a white arrow pointing right.
- Institution Account**: A light blue header with a white arrow pointing right. Below it are several menu items: Mandatory Institutional Profile, Institution Information, Account Information, Enrollment Report (current), Enrollment Reports (previous), Balance Sheet, Continuing Scholars, Import/Export List, and Membership Dues.
- Enrolled Students**: A light blue header with a white arrow pointing right. Below it are: "This section is for students currently enrolled.", "Edit Students", "Import Confirmation Report", and a **Reports** section with the instruction "Use *Tools* to save as excel".

The **Announcements** section is located below the navigation menu. It features a blue header and a grey bar with the text "PLEASE TAKE A MINUTE TO READ THE IMP". The main announcement is titled "Set-Rate update" and contains the following text:

OPTIONAL SET RATE: Schools with higher tuition have the option of awarding TE scholarships at \$39,000 for the 2021-22 school year. If the full tuition is higher than \$39,000.

All other members are obligated to offer full-tuition scholarships.

Public institutions also have the option to provide one-half tuition scholarships for non-residents.

Optional Set-rate for 2021-22 is \$39,000

Optional Set-rate for 2022-23 is \$40,000

Optional Set-rate for 2023-24 is \$41,000

TE Liaison Portal continued

Update the search information

Change your password

Access the 21-22 Enrollment
Report and the past 5 years

Review the Balance Sheet

Confirm your current year
Membership Dues are paid

Institution Account

Mandatory Institutional Profile

Institution Information

Account Information

Enrollment Report (current)

Enrollment Reports (previous)

Balance Sheet

Continuing Scholars

Import/Export List

Membership Dues

TE Liaison Office Portal continued

Edit Students is the place to update bad application data

Students on Leave of Absence will still show here

Import Confirmation Report requires Financial Aid review and confirmation

Historical Export Report – curious where your students enroll?

Export and Import Student Reports – current year only

TE Central is often asked for tax year scholarship amounts. Scholarship award amounts are not retained in the system. TE awards are scholarships not employee benefits and should not be reported as a benefit. The Export school did not award the scholarship.

Enrolled Students —

This section is for students currently enrolled.

- Edit Students
- Import Confirmation Report
- Reports
 - Use "Tools" to save as excel
- Historical Export Report
- Export Student Report
- Import Student Report

TE Liaison Officer Portal continued

Where TE Liaisons conduct
most of your tasks

Switch to the TE-EZ App if you
have not done so already.

Still hesitant contact Vicki
Hendrickson at U of Tulsa or
Nancy Hall at Delaware Valley
for the rest of the story

Applications

This section is for applicants not yet
enrolled.

Scholarship Certification &
Application
Application

Export Applications (new)
Import Applications (new)

Scholarship Recertification of
Eligibility
Enrollment Report | View Submissions

Forms Deletion
Delete Submissions

Reports
Export Applicant Report (2022-2023)
Export Applicant Report (2021-2022)

Import Applicant Report (2022-2023)
Import Applicant Report (2021-2022)

TE Liaison Officer Portal continued

Yes, you can delete submissions BUT contact TE Central instead.

Export and Import Applicant Reports require a bit of understanding.

The year is always the end of the academic year – not the beginning!!!

Applications

This section is for applicants not yet enrolled.

Scholarship Certification &
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Application

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Eligibility
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Reports
Export Applicant Report (2022-2023)
Export Applicant Report (2021-2022)

Import Applicant Report (2022-2023)
Import Applicant Report (2021-2022)

School Listings

Alphabetical Listing of Liaison Officers
Liaison Officer List (Full List)
Liaison Officer List (Select School)
Scholarship amounts for 2021-22

Instructions

Online Forms

Double Credit 3 Exchange Programs

Export/Import 3 (E/I 3)

Special Programs and Options

Import Credit for Housing

TE-GO

TE Liaison Officer Portal continued

Check out other information provided

The school listing information is dynamic and changes as TE Liaison Officer information is updated

While the scholarship amount says 2021 - 22 as schools update tuition to reflect 22-23 charges, the amounts will no longer be correct

TE-EZ App Export Application Duties

Family completes the TE EZ App listing the CURRENT employer.

EXPORT TE Liaison Officer receives email notification.

EXPORT TE Liaison Officer goes to:
Application folder, Export Applications (new)
Decision Pending 22-23. Approve or Deny
each EZ App individually – until Fall that is it!

If the Export applicant is no longer eligible or
interested – EXPORT schools always
WITHDRAW

TE Import Application Duties

Import TE Liaison Officer receives email from NoReply@TuitionExchange.org sharing new applications are available for review and action

Inside the TE Liaison Officer portal Applications - Import Applications (new) Decision Pending 22-23.

Approve - YES, the school will provide the student a TE scholarship

Deny - No, the school will NOT provide the student a TE scholarship

If the student is no longer interested or never completes the application process - select DENIED. Withdraw is reserved for EXPORT schools only!

Import Application Approval

Decision requires a response

Tuition offer requires a number

New Set-Rate \$40,000 for 22-23 will display after 7.1

Comments are seen by Export and Import school only

Always click Update Application

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 \$41,000 <input checked="" type="radio"/> "Set Rate" amount of \$39,000 <input type="radio"/> Other amount of ... \$ <input type="text"/> Must be a number
Comments:	<div style="border: 1px solid gray; padding: 5px; min-height: 100px;">[Handwritten yellow scribbles]</div>
<input type="button" value="Update Application"/>	

Brain Break – no sneezing allowed 😊



Obligations of Membership



Calendar



Financial



Guidelines

TE Liaison Officer New Term/Semester Calendar Reminders

Review your Enrollment Report

- Are all IMPORT students still eligible?
- Are all EXPORT employees still eligible?
- Print and save a copy

Recertify all eligible EXPORTS beginning in February

- February webinar will cover the HOW!

Confirm Leave of Absence (LOA) students are in or out!

- If Fall LOA students did not return for Spring, a new TE application will be required for any future TE scholarship considerations
- If a student is LOA for Spring, confirm in View Submissions the student was recertified. If not, contact TE Central for help!

Suggested Tuition Exchange Calendar

January – review your Enrollment Report for correctness and update as needed

February – review and approve or deny NEW Imports

March - maintain positive communication with Financial Aid, Admissions, and imports

April – finalize import decisions; respond to TE Central’s May 1 space available survey

May – confirm all import decisions are up-to-date and **Exports students** are Recertified

June – **Export schools** confirm employee eligibility and confirm all eligible students are recertified; **Import schools** confirm continuing student eligibility; update Enrollment Report, make sure continuing student EXPIRATION Dates are correct; print the Enrollment Report and final Balance Sheet

July – **Import schools** confirm continuing students are enrolled for next term and new import students are scheduled to enroll; Submit Annual membership dues

August – review View Applicants to confirm all new Import TE student decisions reflect the correct status. Import schools click the Enrolled box for all newly enrolled Imports. Review Enrollment Report to confirm all continuing students are listed

September – Import schools click the Enrolled box for all newly Imports. Export schools click ADD Student when you receive the email message. Make sure all continuing students show on your Enrollment Report. Submit your Enrollment Report, pay your Participation Fees

October – review and update your Mandatory Institutional Profile; review your TE guidelines, update, publish, and communicate any guideline changes; host employee informational sessions; begin the review process of new applications

November – continue to approve eligible TE export EZ apps or add eligible export apps; share Import apps details with Admissions

December – continue to approve eligible TE export requests; share Imports app details; review your Enrollment Report for correctness

TE Liaison Officer Portal

If the school has outstanding financial obligations to TE Central when the TELO logs in Pay Dues Online and/or Pay Fees Online is displayed – see Picture 1

If the school has satisfied all financial obligations with TE Central only Mandatory Training is displayed – see Picture 2



TE Liaison Officer Financial Obligations

Annual Membership Dues

- \$550 due July 15, 2022
- Invoices are emailed to the Primary TE Liaison Officer, Back-up TE Liaison Officer AND Invoice Contact
- Invoice Contact can be the Primary TE Liaison Officer. Please don't leave the category blank!
- Financial Questions? Email Kristine Lev at klev@tuitionexchange.org
- Need a current W-9 – follow the link <https://www.tuitionexchange.org/images/shared/vnews/stories/55706c2dd89dc/W-9%20form%20signed%207.1.2021.jpg>

Invoice Contact

Name

Email

Institution Account
Mandatory Institutional Profile
Bottom Left

Membership Invoice

This is an example of an unpaid Membership Invoice. A \$50 late fee is assessed if the invoice is unpaid effective October 15.

Fee Type	Amount
Institutional Membership Dues	\$550.00
Dues Late Fee	\$50.00
Total Due	\$600.00

Pay with ACH

Pay via check

Pay with Credit Card

Pay via credit card

Membership Invoice

Fee Type	Amount
Institutional Membership Dues	\$550.00
Total Due	PAID 06/28/2021

No payment due at this time

Please note: This invoice reflects Institutional Membership Dues ONLY. You will be billed separately for Participation Fees if you have exports on the program.

Federal Employer Identification Number: 04-2227075

The Tuition Exchange can now accept credit cards as well as new, more secure ACH payments. Please do not use the ACH details provided in the past. Log in to your TELO portal for the new online Payment Button.

Mail in checks are still accepted.

Make the check payable to "The Tuition Exchange, Inc." and return to:

TE Liaison Officer Financial Obligations continued

Participation Fees charged Export schools only

- \$40 per successful EXPORT student
- Participation Fees are generated via the Enrollment Report
- Not sure the amount of Participation Fee balance?
 - Application – Enrollment Report – scroll to the bottom and click submit – the Participation Invoice is presented

Participation Fee Invoice

Fee Type	Amount	
Participation Fees	\$40.00	(1 exported students)
Double Credit Participation Fees	\$0.00	(0 double credit students)
Fees Paid	\$0.00	
Balance Due	\$40.00	

Pay with ACH

Pay via check

Pay with Credit Card

Pay via credit card

Participation Fee Invoice

Fee Type	Amount	
Participation Fees	\$440.00	(11 exported students)
Double Credit Participation Fees	\$80.00	(2 double credit students)

Fees Paid \$520.00

Balance Due \$0.00

No payment due at this time

TE Export and Import Institutional Guidelines

Export eligibility criteria

Import eligibility criteria

Amount of the TE scholarship

Number of semester of available funding

Student type

Academic maintenance requirements

Where are the guidelines posted

Required to Provide Eligible TE Students with...

Full tuition or Set-Rate whichever is less*

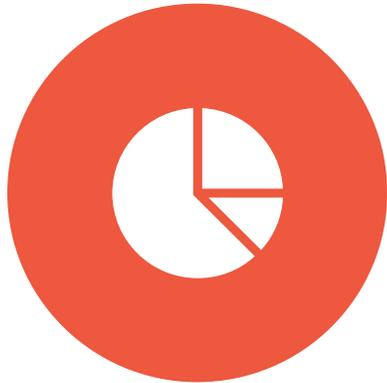
Schools can require students to complete the FAFSA annually

Schools can use federal and state dollars, as well as other institutional grants/scholarships to reduce the TE award

Schools can charge families a reasonable user-fee

* or any amount above the Set-Rate

Let's Recap



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TELO PORTAL



OBLIGATIONS
CALENDAR, FINANCIAL, AND
GUIDELINES

Questions?

Programming – contact Janet
jhanson@tuitionexchange.org

Financial – contact Kristine
klev@tuitionexchange.org

New member suggestions – contact Bob
rshorb@tuitionexchange.org

The first 18 people who email [Janet](#) with the RIGHT answer will receive a winner-winner treat via US Mail

What is the 22-23 Set-Rate?