Mandatory Training Summer 2025

TE Central Staff

TUITION EXCHANGE
Open doors.
New opportunities.

Today's Focus

▶ Reminders

▶ Users

▶ Student Account and TE application reminders

   ▶ New Students

   ▶ Continuing Students

▶ How do I...

▶ Reports

▶ New Portal Items

▶ A few words from TE's Associate Vice President – Elizabeth (Liz) Rihl Lewinsky

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Reminders

- Every member school must:
  - Have a primary and secondary Tuition Exchange Liaison Officer (TELO)
    - The names and email addresses must be different and be an .Edu address
  - EVERY primary and secondary TELO must participate in the Mandatory Training – offered through July 18
- Primary TELO is responsible for system maintenance including:
  - Adding, maintaining, and removing system users
  - Adding and maintaining Annual Aid Year details
    - No Annual Aid year details – the member institution is not available for import or export students to select
- Training Registration
  - All must use the registered TE access email when registering for training

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Users

- Primary TELO
  - Site Manager
  - Responsible for user maintenance
  - Must participate in Mandatory Training
- Secondary TELO
  - Assists Primary TELO with profile management
  - Must participate in Mandatory Training
- The following system information is required:
  - General information: If something is incorrect in the general information section only, email Info@tuitionexchange.org to share what is wrong and the correct details
  - TELOs can update Contacts: TE Central will never email* a listed contact without sharing the email with the Primary and Secondary TELO

* Unless TE Central learns both are no longer employed

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Other User options

▶ Primary TELOs can provide limited or Read-Only* access to:

   ▶ Those who need to know about Exports or Imports, or make payments:

      ▶ Import information

      ▶ Export information

      ▶ Billing (Making payments)

      ▶ Reports

* Read-only access does not require Mandatory Training.

Understanding Users

▶ The Users option allows the primary TELO to review, add, and remove users

▶ Only the Primary TELO can modify users

▶ The Secondary TELO can review users

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Adding a User

▶ Select Users (left sidebar, inside the School Section

▶ To add a user:

  ▶ Click ADD USER (blue box below the First Name column)

▶ Add New User screen opens

  ▶ Enter the user's first name, last name, and email

  ▶ The email must be different than any other user (no duplicates)

  ▶ Select Secondary, Export, Import, Billing, Reports

  ▶ Training: individual Export, Import, Billing, or Reports the Primary TELO can select not required

  ▶ Click Create user (bottom right)

▶ See Snippet: How do I add a new User

Deleting a User

▶ Select Users (left sidebar, inside the School Section

▶ To delete a user:

   ▶ Click on the name of the USER (blue box below the First Name column)

   ▶ The entire line is highlighted

   ▶ Click DELETE USER – (look right under the Training Complete column)

▶ A Warning (Will Robinson) box appears – click DELETE USER

▶ A Success message appears

▶ See SNIPPET: How do I delete a user?

BRAIN BREAK!

Student Account and TE application reminders

▶ The TE Account and TE application is all about the **student**!

▶ For employer-eligible questions, the employee contacts their Human Resource Office or Tuition Exchange Liaison Officer

  ▶ If the eligible employee leaves, the TE scholarship is canceled

▶ For Import eligibility questions, the **student** contacts their Admission Counselor

▶ Tuition Exchange is not an employee benefit

▶ Tuition Exchange is a scholarship opportunity

▶ Not all **students** will qualify for a Tuition Exchange scholarship

▶ The **student** is responsible for reading, understanding, and asking questions about the TE scholarship offered

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Creating the TE scholar account

▶ Student creates an account

▶ Student uses an email address they can access beyond high school

▶ The parent email address does not belong here

▶ The **student** is creating a Tuition Exchange account, which stays with the **student** throughout their educational journey as a TE scholar.
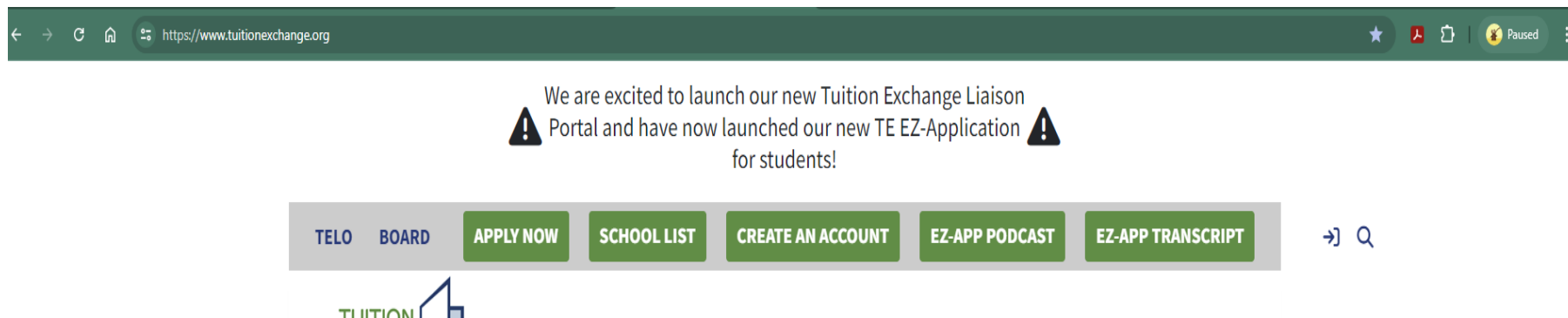
Student TE account and applications

- Applications
  - First-time student seeking TE support
  - Transfer student
- No current students receiving TE should ever* complete a new application
  - *Only exception – the eligible parent changes jobs

- URL: https://te.tuitionexchange.org/applicantsignin
- The student owns the account
- Every action is recorded for student review
- Should the **student** wish to transfer, take a leave of absence, or stop out, the application follows, and no new student account should ever be created

Completing the TE Student account

- Nine TE EZ-App steps

  - Enter the same **student** email address used to create the TE EZ-Application account

  - Re-enter the same 12-character password, which includes alpha, numeric, and special characters, used to create the TE EZ-App account

  - If the employee is also a student seeking TE, use a non-work account to set up the TE account

  - Confirm the password

  - Once the **student** graduates from high school or turns 18, whichever is first, the **student** owns all academic records. By checking the box, the **student** agrees that the eligible employee listed on the TE EZ-App can ask questions and receive information regarding the **student's** Tuition Exchange account

  - The last but the most crucial step is to click **CREATE ACCOUNT**

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Completing the TE Student account

▶ Student selects the Application Year

  ▶ For the 2025 high school graduating senior, the Application Year is 2025-2026

  ▶ If an application did not transfer from the old system to the new system, the student selects the Application Year 2024-2025

▶ Use the same student information provided for all admission applications

▶ Remember the information is all about the student

▶ Biggest student account error is the student's birthyear – look again

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Hi, Training User
Sign Out

EZ Application

The TE EZ-Application is for a first-time TE applicant or a student planning to transfer to a new TE school only. **Returning TE scholars <u>do not</u> need to re-submit a TE EZ-Application on an annual basis unless they are planning to transfer to a new school.** Your best resource for information on your application or the process is the Tuition Exchange Liaison Officer at the college/university where your parent is employed and your Admission Counselor at the colleges you are applying to.

Application Year* ▾

Student Information

The following questions are related to the student applying for TE scholarship consideration. The information supplied must be about the student, not the eligible employee. All information marked with an asterisk * is required.

Country*
The United States ▾

Address 1*   Address 2

City*   State* ▾   ZIP*   ZIP+4

Birthdate
Phone*   Month*   Day*   Year*
                                MM   DD   YYYY

Employee Information

Please provide eligible school employee (parent's) information.

Employer* ▾

First Name*   Last Name*   E-mail*

Title or Position* Years of Employment* Employee Id

Application Information

Please note: You can select up to ten (10) institutions to receive your TE EZ-Application. Should you wish to update your school list, you can delete an institution and add another but are limited to a maximum of ten active schools. If you delete a school, they will no longer consider your TE EZ-Application. Be sure to click *Update* to save.

Student Classification* ▾

Applying To* ▾

☑ I agree to allow the Export (employer) and Import (attending) school to share my Tuition Exchange information with the parent listed on my Tuition Exchange application.

☐ I have read the full instructions for completing the Tuition Exchange application. It is understood that I will not be considered for a TE scholarship offer until my admission application is complete.

SUBMIT

Application Status

Member Schools

School Search

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Completing the TE Student account

▶ Reported eligible employee information is about the eligible employee

Employee Information
Must be eligible school employee information

[Employer ▾]

▶ Use the dropdown box to locate your employer

 ▶ If the school's name is greyed out – review the school's profile

  ▶ Most likely, the Export/Import application date has passed

  ▶ Regardless, contact the TE Liaison Officer listed in the school profile for further assistance

▶ Applications are for new students only

 ▶ Re-certified in the old system did not create an app in the new system

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Completing the TE Student account

▶ First and Last name must be that of the eligible employee

▶ The email must be the eligible employee's employer .edu* email address.

  ▶ i.e. john.doe@Doecollege.edu THIS IS AN EXAMPLE ONLY!

  ▶ * if the eligible employee does not have a .edu email address, check directly with the employee's TELO for options

▶ The eligible employee's exact title or position must be provided

▶ In whole numbers, provide the years the eligible employee has been employed at the school

  ▶ For any questions about years of employment, the employee connects with Human Resources or their TELO

▶ Employee ID – this is a series of numbers assigned to the employee by the employer

  ▶ DO NOT PROVIDE the eligible employee's social security number!

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Additional Information please

▶ Each school may ask up to three additional school-specific questions

▶ Each school-specific question must be answered to apply successfully

  ▶ Questions regarding the school-specific questions must be directed to the eligible employee's TELO

▶ The questions are not TELO searchable or have an associated TE report

Completing the TE Student account

▶ The information in this section is all about the **student**

    ▶ **Student** Classification

        ▶ The first 5 options are for the undergraduate **student**

            ▶ If the Free Application for Federal Student Aid (FASFAA) is completed, use the same **student** classification

        ▶ The final option is for the eligible employee, spouse, or registered domestic partner if the eligible employee's employer offers graduate school as a TE scholarship option

            ▶ Check with the eligible employee's TELO for additional information and program clarification

                ▶ Generally, once the **student** graduates, they are no longer considered an eligible dependent of an eligible employee

▶ Applying to is where the **student** selects up to ten (10) schools to which the **student** will apply or has applied for admission

▶ The maximum number of schools is ten (10)

▶ The **student** can modify the list until one school enrolls the **student**

Student application status matters

▶ The **student**'s Application Status is important

  ▶ If open, the **student** can modify the application

▶ The **student** can click on OPEN to review the individual statuses of their **student** application

▶ Never close the student's account until your school term has begun

▶ If closed, the **student** cannot modify the application

▶ The **student** can click on the CLOSED option to review the individual statuses of each **student**'s applications

▶ The **student** contacts the Import school for additional information

  ▶ **TE Central suggested that students** always contact their admission counselor at the import school for information

Finalizing the TE Student account and application

▶ Every time the **student** reviews or changes to their TE account and app, the **student** must check the box and click SUBMIT

☑ I have read the full instructions for completing the Tuition Exchange application. It is understood that I will not be considered for a TE scholarship offer until my admission application is complete.

SUBMIT

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Time to stretch
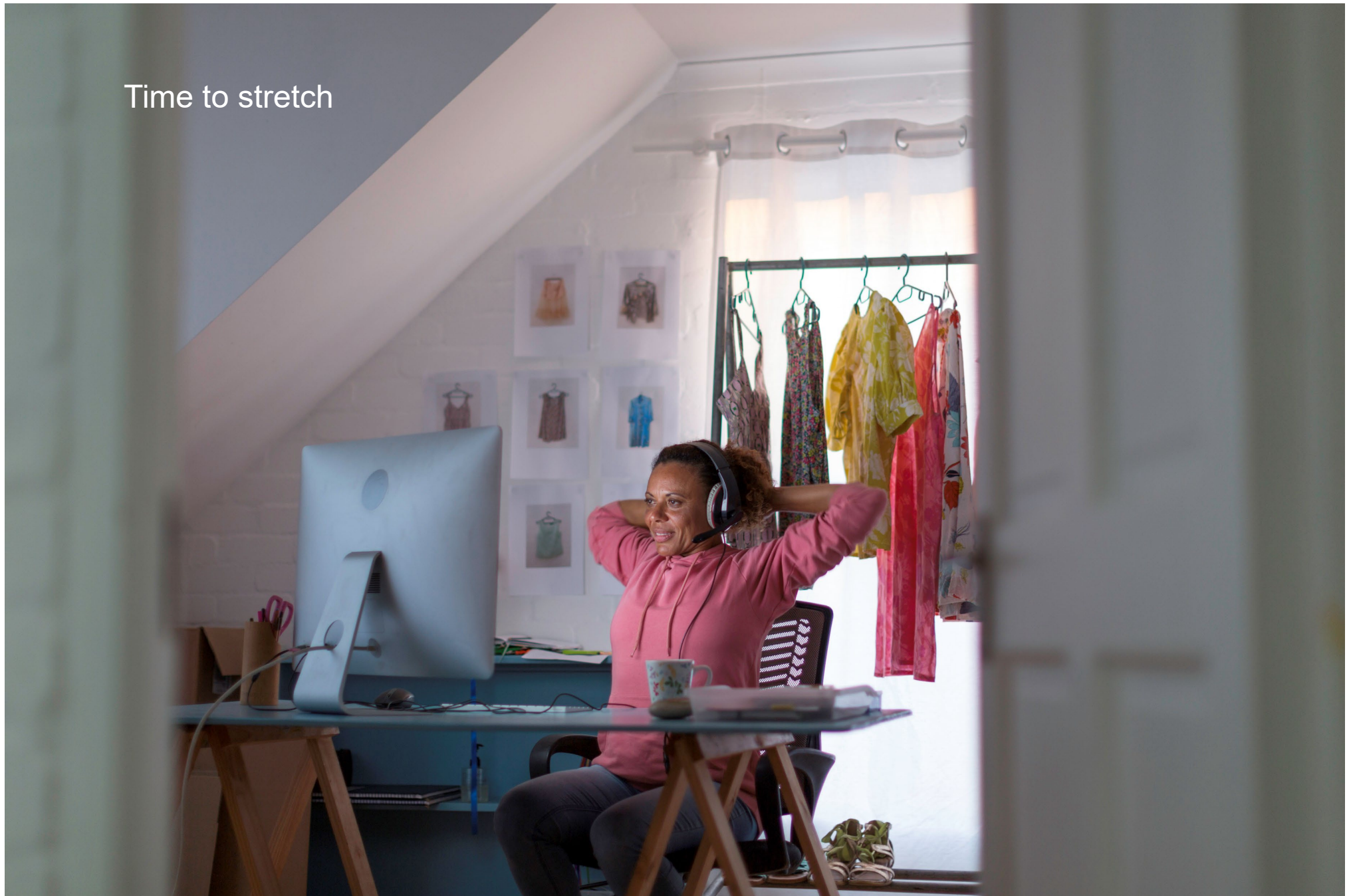
Continuing students

- Reminders

  - If the student's expiration date was before 6.1. 2024, the student DID NOT transfer to the new system

    - It is the responsibility of the Import TELO to inform the student that they must create an account and application in the new system

    - It is the responsibility of the Export TELO to approve the application

  - The old system data was goofy, and continuing student-eligible-employee information did not move forward

  - All first-time 2024-2025 applicants moved

    - Provided the application was completed correctly by the student/employee

    - Applications in statuses other than Approved and Decision Pending did not move

  - No data moved for 2025-2026 applicants

    - Please reach out to your employees with the new URL and share the instructions included with this training in your toolbox and online inside the Liaison Officers Training calendar

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Continuing student reminders

▶ All continuing students have an entry aid year of 2023-2024 and an export approval and export status date of 06/18/2024

▶ None of these students will have a complete record

▶ You can update the birthdate – as a rule, use 1999

▶ You can update the employee's last name – provided you know it

   ▶ Don't know it? Use the ever-present UNKNOWN

▶ Phone number lacking the last digit – add 0 unless you know the number

▶ If the zip code begins with 0 – ADD the leading 0 again

▶ Waring Will Robinson – the system does not allow you to exit a student record that is not complete. See birthdate, Employee's last name, phone number, and ZIP code suggestions above

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Other student issues

▶ Many FAQs are available to help you work through the new system

   ▶ See Slide 55 for where to find the FAQ's

▶ My student is missing

▶ Enrolling a funded Tuition Exchange student

▶ FACHEX & TE programs

▶ The student attended summer school, needs additional time, or is on a Leave of Absence

Working a student's account

This Photo by Unknown Author is licensed under CC BY-SA-NC
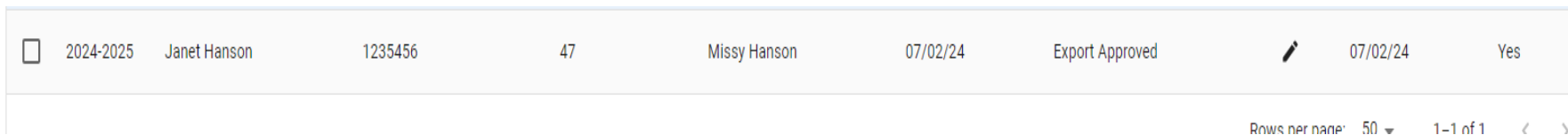
Exports
Applications

▶ The Daily Digest tells you students are awaiting your action

> ▶ Open the correct Application Year and Export Status Awaiting Export Decision
>
> ▶ If many employee's application, you can click on the AID YEAR or you can do one at a time!

☑	COLUMNS	FILTERS	EXPORT							
☐	Aid Ye... ⋮	Employee Name	Employee ID	Years of Service	Student Name	TE EZ App Date	Export Status	Actions	Export Status Changed	Import Approved

> ▶ Now click on the pencil and select Export Approved option and then UPDATE

| ☐ | 2024-2025 | Janet Hanson | 1235456 | 47 | Missy Hanson | 07/02/24 | Export Approved | ✏ | 07/02/24 | Yes |

Rows per page: 50 ▾   1–1 of 1   ⟨ ⟩

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Imports
Applications (approved for EXPORT)

Import Applications

Current School	Application Year	Import Status
Doane University - NE - Crete, NE	All Active Aid Years	All Import Statuses

III COLUMNS   FILTERS   ⬇ EXPORT

☐	Aid Year	Student Name	Program Type	Import Status	Actions	Import Status Date	Modified By
☐	2024-2025	Ryan Burton	TE	Import Approved	✏	06/15/24	No Action Taken

Rows per page: 50 ▾   1–1 of 1   ‹ ›

VIEW APPLICATION

Make sure you are in the correct Active AID YEAR!
Select Import Decision Pending or any other status
Click on each student's pencil and update the status to Import Approved or the appropriate status

Other Application issues

▶ Pay attention to Transfer Applications and approve or deny as necessary

▶ Pay attention to Closed Applications

   ▶ If incorrectly CLOSED, the student will need to complete a new application

      ▶ When this occurs, notify the EXPORT TELO and the student!

      ▶ TE Central can no longer modify student records

Enrolling the Student

▶ Before August 15, confirm with the Registrar that all Import Approved students are or plan to attend your school!

▶ If yes, beginning on August 15, the option of ENROLLED appears in the Import Status option

  ▶ This is a one-at-a-time option

  ▶ No batch process is available for Imports

▶ If you selected the WRONG student, move the student to the correct status

  ▶ Most likely DENIED

▶ All other students NOT ENROLLED and NOT attending – update those students to DENIED and select the most appropriate reason of why denied

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What Reports are available to me

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Reports

▶ Exports

▶ Imports

▶ Enrollment (aka Enrollment Report)

▶ Tuition

Report Exports

Export

Application Year: **All Years** Export Status: **All Statuses**

| III COLUMNS | ☰ FILTERS | ↓ EXPORT |

Aid Year	Employee Name	ID	Title	Years of Service	Student Name	App Date	Export Status
2023-2024	Janet Dodson		NULL	0	Missy Hanson	03/20/2024	No Longer Eligible
2023-2024	Janet Dodson			0	Missy Dodson	No Date	Export Approved
2023-2024	Jeff			0	Claire E Vincent (never enrolled)	No Date	Export Approved
2023-2024	Lina			0	Rafael C Diaz	No Date	Export Approved
2024-2025	Janet Hanson	1235456	Financial Aid Director	47	Missy Hanson	07/02/2024	Export Approved

Rows per page: 50 ▾   1–5 of 5   ‹ ›

Caution, Will Robinson!!! You need to set the following details before running every report!
> Application Year
> Export Statuses

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Reporting options by Column - Export

III COLUMNS   ⇊ FILTERS   ⬇ EXPORT

▶ Column choices

  ▶ Employee's name

  ▶ Employee's ID

  ▶ Employee's Title

  ▶ Employee's year of service

  ▶ Student's Export Status

  ▶ Student's Program Type (FACHEX or TE)

  ▶ Student's Eligibility Remaining

  ▶ Student's Leave of Absence

Reporting options by Filter - Export

III COLUMNS	FILTERS	EXPORT
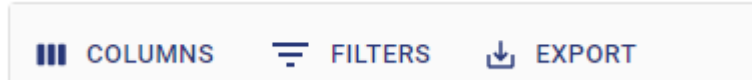
- ▶ Filter choices
  - ▶ Employee's name
  - ▶ Employee's ID
  - ▶ Employee's Title
  - ▶ Employee's year of service
  - ▶ Student's Export Status
  - ▶ Student's Program Type (FACHEX or TE)
  - ▶ Student's Eligibility Remaining
  - ▶ Student's Leave of Absence
- ▶ Filtering is done via a logic statement
  - ▶ Consider cause and effect = if-then statements

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Report downloading

III COLUMNS	☰ FILTERS	⬇ EXPORT

Users can EXPORT any report data to a CSV file
The CSV file can be shared with your IT staff for uploading
     TE Central is unable to support file uploads
When exporting the CSV file to EXCEL
     Open the CSV file and copy the data
     Open a new EXCEL document and in the upper left-hand corner, RIGHT-click your mouse, select PASTE SPECIAL and ALL
     This process brings the data to the EXCEL format as it was in the CSV format

You can then manipulate the data as needed

Reports
Imports

Caution, Will Robinson!!! You need to set the following details before running every report!

      Application Year

      Export Statuses

Reporting options by Column - Imports

▶ Column choices

    ▶ Aid Year

    ▶ Student Name

    ▶ Birthdate

    ▶ Address

    ▶ Address 2

    ▶ City

    ▶ State

    ▶ ZIP

    ▶ ZIP + 4

    ▶ Email

    ▶ Cell Phone

    ▶ Import Status

    ▶ Export School

    ▶ Student's Export Status

COLUMNS   FILTERS   EXPORT
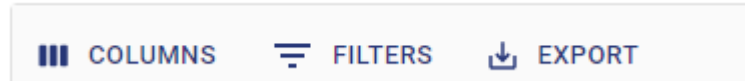
Reporting options by Filter - Imports

COLUMNS   FILTERS   EXPORT

- Filter choices
  - Aid Year
  - Student Name
  - Birthdate
  - Address
  - Address 2
  - City
  - State
  - Zip
  - Zip + 4
  - Email
  - Cell Phone
  - Import Status
  - Export School
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Report downloading

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Reports
Enrollment (aka Enrollment Report)

Exports

| | COLUMNS | FILTERS | EXPORT |

Aid Year	Student Name	Import School	Export Status	Export Status Date	Eligibility Remaining
2023-2024	Natalie M Ellis	William Jewell College - MO	Export Approved	06/15/2024	2
2023-2024	Elisia M Frey	Malone University - OH	Export Approved	06/15/2024	4
2023-2024	Ariana K Hinrichsen	Lynn University- FL	Export Approved	06/15/2024	6
2023-2024	Thomas James Kennedy-Croft	Rockhurst University - MO	Export Approved	06/15/2024	2
2023-2024	Trey Lopez	Mount Marty University - SD	Export Approved	06/15/2024	2
2023-2024	Ethan A Smith	Midland University - NE	Export Approved	06/15/2024	4
2023-2024	Maggie Wohl	Hastings College - NE	Export Approved	06/15/2024	6

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Imports

| | COLUMNS | FILTERS | EXPORT |

Aid Year	Student Name	Export School	Import Status	Import Status Date	Eligibility Remaining
2023-2024	Caiden Henry-Perlich	Hastings College - NE	Enrolled	06/15/2024	2
2023-2024	Hailey Romero	Park University - MO	Enrolled	06/15/2024	6
2023-2024	Elizabeth K Landgren	Hastings College - NE	Enrolled	06/15/2024	2
2023-2024	Kailey Romero	Park University - MO	Enrolled	06/15/2024	6

Rows per page: 50 1–4 of 4 < >

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Reports
Enrollment (aka Enrollment Report)

▶ The IMPORT school's actions update the report

▶ Import schools must mark all eligible students as ENROLLED

  ▶ Available August 15 and beyond

▶ Eligibility Remaining updates occur

  ▶ For all students on August 15, December 31, and May 31

  ▶ For Quarter and Trimester schools, March 15

▶ Refer to the Enrollment Report Snippet for the details

Reporting options by Columns – Enrollment Report

- ▶ Filter choices
  - ▶ Aid Year
  - ▶ Student Name
  - ▶ Import School
  - ▶ Export School
  - ▶ Export Status
  - ▶ Export Status Date
  - ▶ Eligibility Remaining
- ▶ Filtering is done via a logic statement
  - ▶ Consider cause and effect = if-then statements
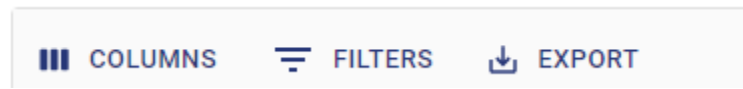
Report downloading

COLUMNS   FILTERS   EXPORT

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You manipulate the data as needed

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Reports Tuition

▶ A few words of caution: Accurate reporting is crucial for maintaining compliance with scholarship and funding details

▶ Run the report of the year you want information – not all years

▶ Remember, the EXPORT school did not award or fund the TE scholarship and should not include the TE scholarship as a part of any employee details

▶ If the EXPORT school does include the TE scholarship, remember that calculations are required

   ▶ IE: 2025 employment letter would include ½ of 2023's tuition and ½ of the 2024's tuition

Reports
Tuition

Reporting options by Columns – Tuition

▶ Filter choices

  ▶ Aid Year

  ▶ School Name

  ▶ City

  ▶ State

  ▶ Tuition

  ▶ Award Amount

  ▶ Award Type

  ▶ Filtering is done via a logic statement

  ▶ Consider cause and effect = if-then statements

COLUMNS   FILTERS   EXPORT

Report downloading

| III COLUMNS | FILTERS | ⬇ EXPORT |

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The New TE Portal provides

▶ Prior year data and details in the system – no more overwriting

▶ You determine the answer to the percentage of students receiving TE question

▶ Three extra Export questions

▶ Student-focused account and subsequent applications

    ▶ Parent information must be the eligible employee information

    ▶ Student classification mirrors the FAFSA question

    ▶ Expanded Academic Program options

▶ System records all application action dates

▶ Read-only access for some users

▶ No more re-certification

▶ Daily Digest

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And now a few words from Tuition Exchange's new Associate Vice-president Elizabeth (Liz) Rihl Lewinsky

Thank you, Janet, for everything!
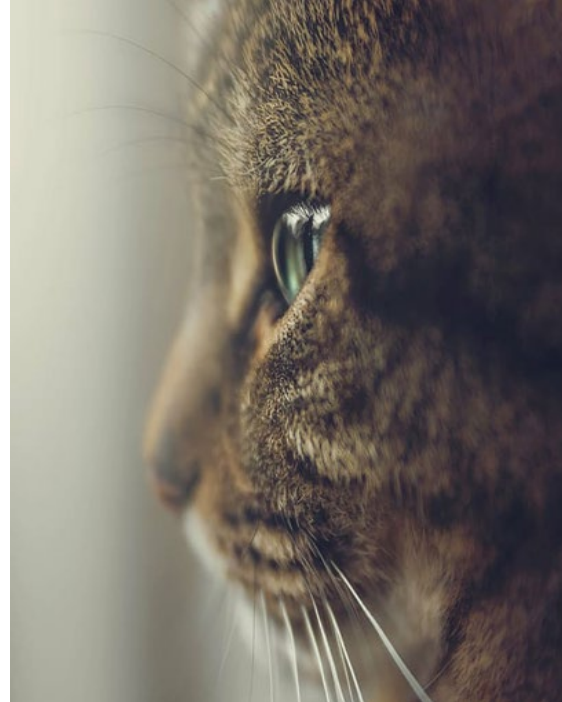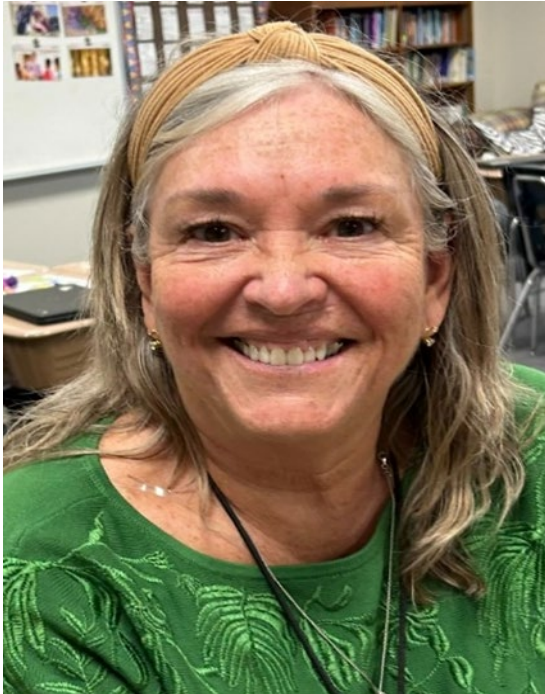
You, and Missy Cat, will be sorely missed!

To-Do Items

▶ Membership dues must be paid no later than July 30, 2024

    ▶ Pay by credit card at te.tuitionexchange.org or

    ▶ Pay by check mailed to Tuition Exchange, 3 Bethesda Metro Center, Suite 700, Bethesda, MD 20814

▶ Review and update your internal TE guidelines and communicate changes with employees

    ▶ Post your internal TE guidelines inside your Employee Handbook, Faculty Handbook, and Student Handbook

▶ Consider offering a Tuition Exchange Update for your employees in early Fall

    ▶ Team up with Admissions, Human Resources, and Financial Aid colleagues for robust information

Reminders regarding System Access

- Twenty-four (24) hours after completing live Mandatory Training, you should log in to te.tuitionexchange.org using your school email address

- Click "Forgot Password"

  - A new password will be emailed to your school account within 5 minutes of your request

    - Didn't receive it? Please check your spam. The sending email address is info@tuitionexchange.org

    - It is suggested that you copy the temporary password – be sure to copy ONLY the password

- Using the TEMPORARY password – log in to the system

  - You will be prompted to update your password

  - 12 characters – if you select unacceptable characters, the system will tell you

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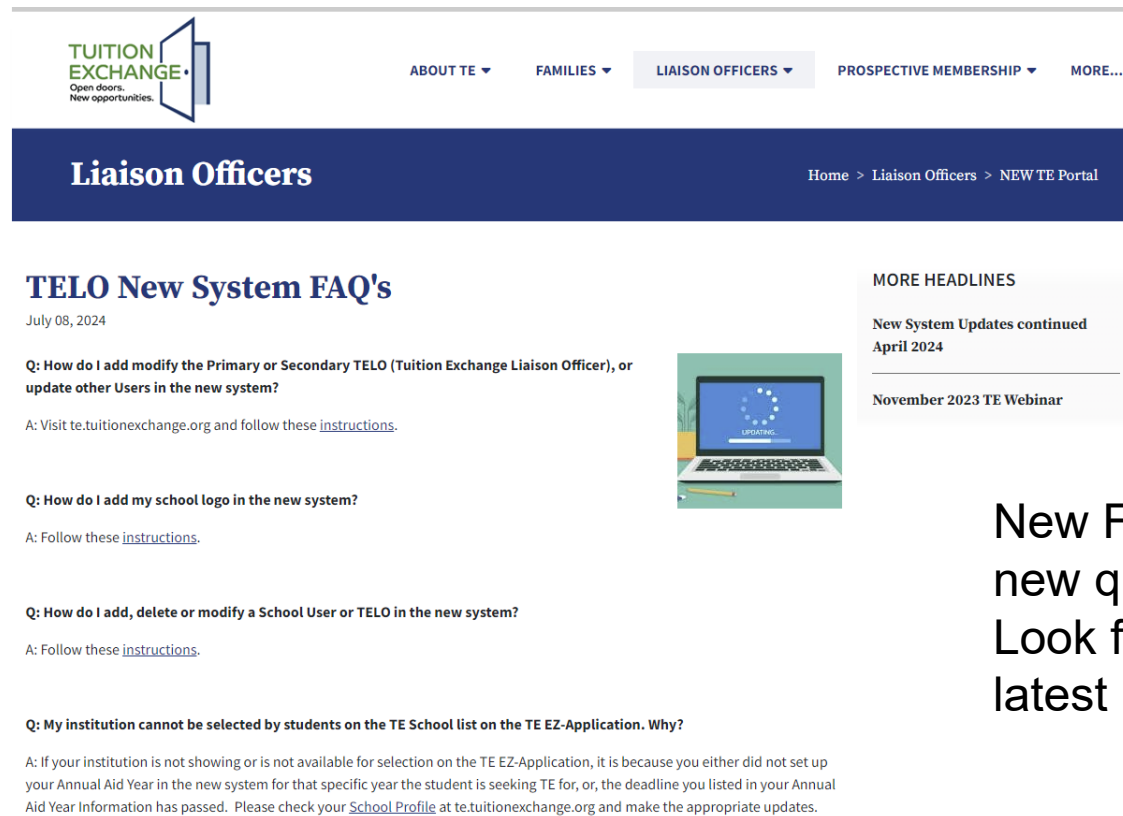
New System Access Updates

▶ New System access will be available to you within 24 hours after you attend live Mandatory Training

▶ If you are attending a recorded option, your attendance is updated every Thursday

▶ Amazon e-gift cards

    ▶ Those who were among the first 50 who registered and attended a live Mandatory Training session for at least 45 minutes will be emailed by the end of July

    ▶ Watch your .edu email account!

TELO New System FAQs & Instructions (Liaison Officers – New TE Portal)

New FAQs will be added as new questions arise
Look for NEW next to the latest FAQs

Contacting the Tuition Exchange staff

▶ Contact us: info@tuitionexchange.org

▶ Your message will be responded to within 24 business office hours

▶ Kristin Tichenor: President

▶ Liz Rihl Lewinsky: Associate Vice President for Member Engagement

▶ Kristine Lev: Director of Administration (invoices)

▶ Suzanne LeAnce: Assistant Director of Communication

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Future Training Sessions

▶ Spread the word! Mandatory training continues through July 18

    ▶ Additional sessions will be available as needed

▶ Podcast now available on the new TE Student Account and EZ-Application process

    ▶ Check out the front page of the Tuition Exchange website – www.tuitionexchange.org

        ▶ You are encouraged to listen so you can respond to your employee and potential student questions

▶ Future webinar topics to include:

    ▶ Reporting in the new system — A Brave New World

    ▶ How to leverage TE to grow enrollments & support retention on your campus

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Thank you for your time and attention
We want to hear from you!
Scan to take the short survey

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