

Keeping your TE applications in check and up-to-date

January, 2015

Janet Dodson and Bob Shorb

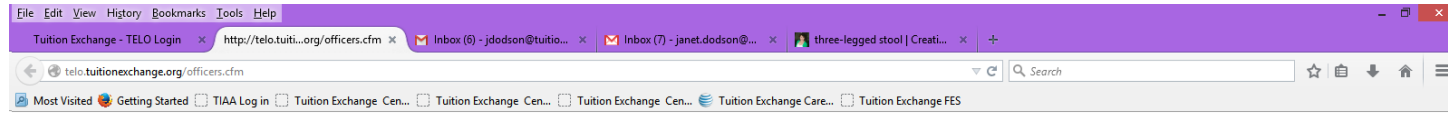
Today's Focus

- ▶ Information Review
- ▶ Communication
- ▶ Sharing information
- ▶ Confirmation
- ▶ Follow-up
- ▶ TE Update

Information Review

- ▶ www.tuitionexchange.org
 - ▶ Liaison Officers
 - ▶ Log in using your TE credentials

TELO portal login

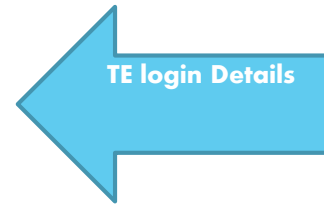


Liaison Officers Login

TE Code:

Password:

Login



Information Review

- ▶ How do I know who is interested in attending my school?
- ▶ Who should I share information with?
- ▶ What information can be shared?
- ▶ When should the information be shared?
- ▶ How did all this information get here?

Information Review

The screenshot shows a web browser window with the URL <http://telo.tuitionexchange.org/liaison/index.cfm>. The browser's address bar and tabs are visible at the top. The page content is organized into a sidebar on the left and a main content area on the right.

Online Forms (indicated by a blue arrow pointing to the sidebar):

- Instructions
 - Instructions for the Annual Report
 - Instructions for the Online Forms
 - Procedure for Withdrawal
- Special Programs and Options
 - Import Credit for Housing
 - TE-GO
- Editing
 - Students
 - Contact Information and Password
- Reports
 - TELO list with Email Addresses
 - Liaison Officer List (Full List)
 - Liaison Officer List (Select School)
 - Alerts & Restrictions
 - Annual Report
 - Balance Sheet
 - Continuing Scholars for Next Year
 - Import/Export List
 - Scholarship amounts for 2014-15
 - E/1 3 Participants
- Dues and Fees Invoices
 - Membership Dues
 - Participation Fees Statement
- Online Forms
 - Scholarship Certification & Application
 - Submit Form | View Applicants
- Scholarship Recertification of Eligibility
 - Annual Report | View Submissions
- Withdrawal/Leave of Absence/
Loss of Eligibility
 - Submit Form | View Submissions
- Forms Deletion
 - Delete Submissions
- TE Homepage
- E-mail

Meetings and Deadlines (Main Content Area):

Contact Information for Tuition Exchange
3 Bethesda Metro Center Suite 700
Bethesda Maryland 20814
301-941-1827

TELO's may call Janet Dodson directly at 402.418.1081
or email Janet at jdodson@tuitionexchange.org

The updated TE Handbook is now available online inside the TELO Only Resources section of Bucket #5. It is filed in the Communications folder.

TELO Resource login details
www.tuitionexchange.org 5th bucket on the right Select TELO Login the login credentials are: TELO@tuitionexchange.org pword: TELO14
This is generic for all TELO's DO NOT change the password or login credentials. Thanks...

Family Power point presentation and handouts now available
a generic power point about Tuition Exchange and a generic handout is now available in the Communications folder of the TELO only section of the TE Website. You are welcome to use the power point. Please be sure to update the power point with information about your school. Suggestions for updates are always appreciated.

TE October 2014 Newsletter is now available in the Communications folder of the TELO Only section of the TE Website.

Liaison Officer Workshops
Spring, 2015 will be our next Face-to-face workshops. Stay tuned for additional information. The training is free of charge.
November 13 - TE Webinar focus is Understanding your Balance Sheet. Invitations will be emailed no later than 11-03-2014. If you do not receive the information, please contact Janet directly.
All TE training webinars are recorded and available inside the TELO Only Forms section of our website.

"Set Rate"
TE "SET RATE" for 2014-2015 is \$32,500.
TE "Set Rate" for 2015-2016 is \$33,000.

Membership Dues/Participation Fees TE Dues and Fees: TE 2014-15 Member Dues of \$500.00 were due July 1st
Please go to www.tuitionexchange.org and log in to your Liaison Officer Admin Menu page.

Scroll down to the Dues and Fees Invoices heading. Click on Membership Dues to see your new invoice (Dues are still \$500). Please print your invoice and send in your check by July 1st. If your Business Office requires the W-9 form, it is available on line by copying the following link, then left clicking and select the option Open Link in new tab. <http://tuitionexchange.fesdev.org/vnews/display.v/ART/539f1140eea8d>

Communication



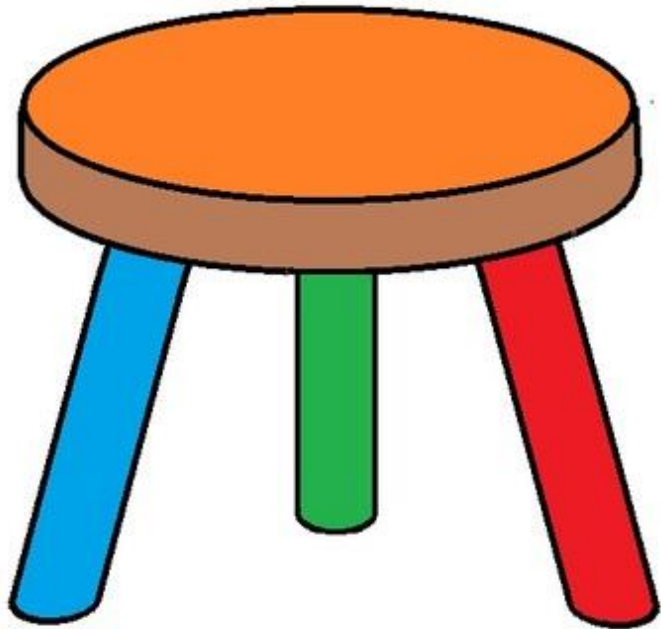
- ▶ External Communication
 - ▶ Employees, students and families
- ▶ Internal Communication
 - ▶ Employee
 - ▶ Enrollment Services
 - ▶ Financial Aid
 - ▶ Human Resources

Communication - External

So let's talk and share information!



Communication - External



- ▶ Employee - how does my kid apply
- ▶ Student - my parent works for a TE school how do I get this opportunity
- ▶ Family - I need to know more who do I call

Communication - Internal



- ▶ What does the word benefit mean?
- ▶ Employee - how do I get this benefit (subsidy) for my kid?
- ▶ Enrollment Management - we want to attract and retain the best kids that will benefit (promote) the school
- ▶ Financial Aid - we want to spend our financial aid dollars on the neediest kid that will benefit (be helped) most from our resources
- ▶ Human Resources - we want to attract and retain the best employees so that all benefit (use)

Sharing Information



Sharing Information

- ▶ Information sharing can be overwhelming
- ▶ Show your colleagues what information you have available for each TE applicant
- ▶ Ask your colleagues what pieces of the information they would like to have shared
- ▶ Determine the best way to share the information and the timing of sharing the information



Information Sharing



Scholarship Certification & Application

School Year:	2015 - 2016
Student First Name:*	Jannie
Student Middle Name:	K
Student Last Name:*	Dodson
Social Security Number:*	1234
Please enter the last 4-digits of the SSN.	
Student E-mail:*	jkhd76@gmail.com
Telephone:*	402.418.1081
Permanent Address:*	660 Pioneers Ct Marion, KS 66861
Parent Employment Category:*	Staff (non-faculty)
Parent/Guardian Name:*	C N Hanson
Parent E-mail:*	thegeneral@cox.net
Years of Parent Employment*:	50
Total number of academic years*:	4
Total number of semesters:*	8
Student is Federal Pell Grant eligible:*	No
Application Status:*	Applying for Admission
Class:*	Freshman
Applying To:*	Abilene Christian University -TX (TX) Adelphi University - NY (NY) Adrian College - MI (MI) - TE Co-op Agnes Scott College - GA (GA) AIB College of Business - IA (IA) - TE Co-op Alaska Pacific University - AK (AK)

Sharing Information

- ▶ Review TE policies and procedures annually
- ▶ Update and educate other offices about TE programs
- ▶ Determine jointly the goals for TE and how they help your school
- ▶ Determine timelines for information sharing
- ▶ Help each other put the pieces together

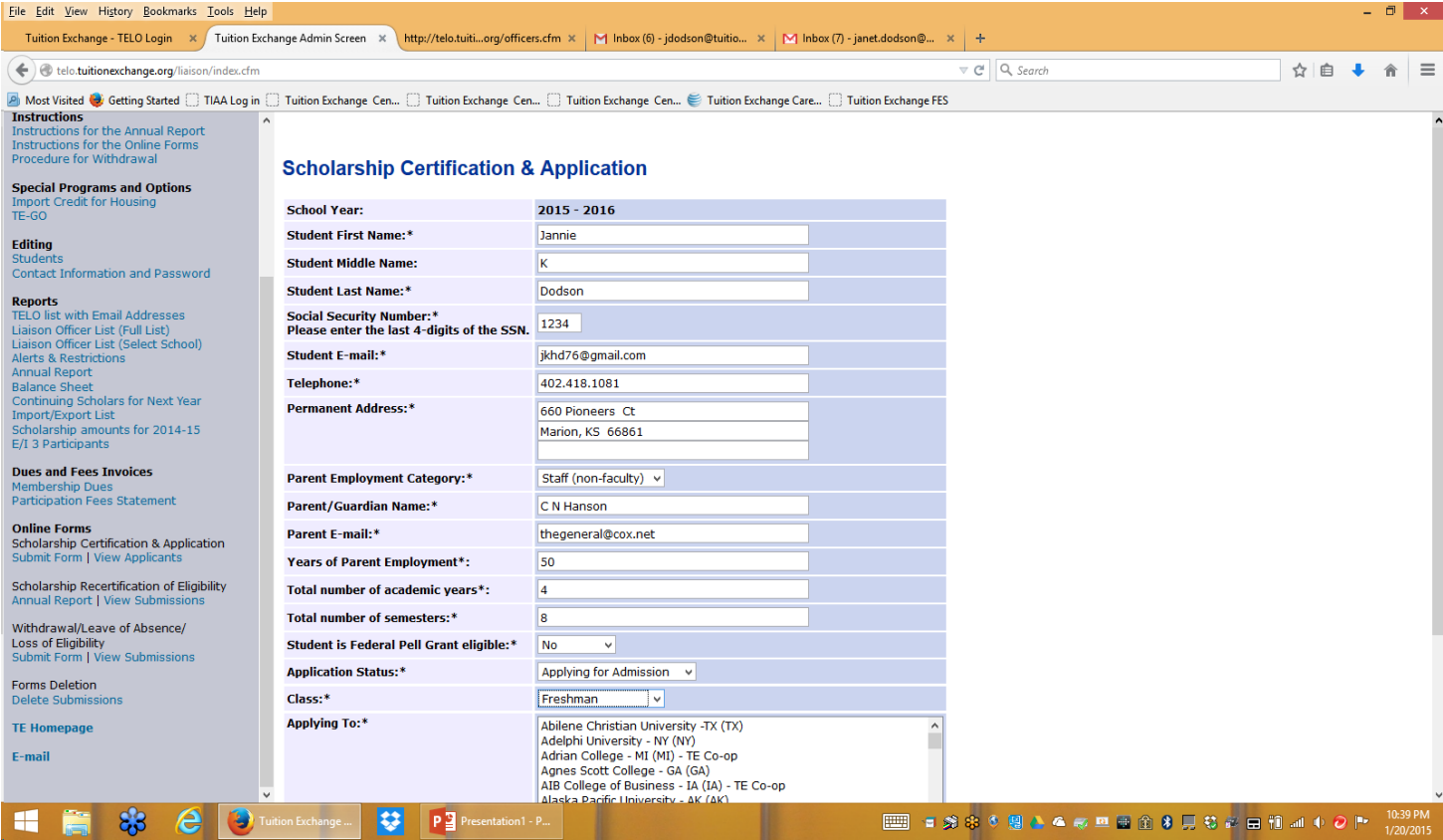


Sharing Information

- ▶ Check your TE site often for:
 - ▶ New submissions
 - ▶ New TE applications
 - ▶ Changes to submissions
 - ▶ Rejects
 - ▶ Cancellations
 - ▶ Duplicates
 - ▶ Update records
 - ▶ Approval
 - ▶ Pending
 - ▶ Rejected
 - ▶ Withdrawal - use this feature for the open year only
 - ▶ Delete - use this feature to eliminate a TE application only



Information Sharing



The screenshot shows a web browser window with the URL <http://telo.tuitionexchange.org/officers.cfm>. The page title is "Scholarship Certification & Application". The form contains the following fields:

School Year:	2015 - 2016
Student First Name:*	Jannie
Student Middle Name:	K
Student Last Name:*	Dodson
Social Security Number:*	1234
Please enter the last 4-digits of the SSN.	
Student E-mail:*	jkhd76@gmail.com
Telephone:*	402.418.1081
Permanent Address:*	660 Pioneers Ct Marion, KS 66861
Parent Employment Category:*	Staff (non-faculty)
Parent/Guardian Name:*	C N Hanson
Parent E-mail:*	thegeneral@cox.net
Years of Parent Employment*:	50
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A blue arrow points from the left side of the slide towards the screenshot.

Confirmation



Confirmation

- ▶ Everybody wants to know something
- ▶ Keep all in the loop
- ▶ Confirmation is a multi-level street
- ▶ Guessing does not lead to calm...
- ▶ Be active in your confirmation and
- ▶ Keep all informed when you say you will!



Follow-up



Follow-up

- ▶ With students
- ▶ With employees
- ▶ With colleagues

Not just the first year - but each new enrollment period

Keep your data “clean” and in check



TE Update

- ▶ TE-GO Reminder
- ▶ E/I 3 and DC 3
- ▶ Dues and Fees
- ▶ 2016-2017 Set-Rate
- ▶ TELO portal progress
- ▶ Data Dashboard update
- ▶ Family Brochure now available
- ▶ February, 2015 Training



Update!
Update!

Let's Recap

- ▶ Information Review
- ▶ Communication
- ▶ Sharing information
- ▶ Confirmation
- ▶ Follow-up
- ▶ TE Update

- ▶ Join TE Central February 26 for the topics:
 - ▶ Institutional TE Capacity
 - ▶ Institutional TE Policy and Procedure review and suggestions

