

# Spring Enrollment Report Review, Reports/Change Logs & System Enhancements



January 2025

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# Today's Agenda:

- ▶ TELO System Reminders
- ▶ Understanding the New Enrollment Review Process
- ▶ Eligibility Remaining
- ▶ Deferred Admission, Summer School, Extending Eligibility, Leave of Absence
- ▶ Daily Digest Emails
- ▶ Reports & Change Logs
- ▶ TELO System Enhancements & TE Updates
- ▶ Open Q&A



# TELO System Reminders:

- ▶ Continuing students: ALL moved with cohort year of **2023-2024**
- ▶ New 2024-2025 students moved if “decision pending” or “approved” and *Export Approved* before 6/25/24.
- ▶ **Cohort year:** Year a student begins receiving TE. Stagnant.
- ▶ Continuing TE Scholars do **not** complete a new TE EZ-Application each year.
  - ▶ Exceptions: transferring & parent separation from employer
- ▶ TELO’s control what students/parents see on tuitionexchange.org & TE EZ-Application employer/Import school lists:
  - ▶ Export & Import application deadlines under ***Annual Aid Year School Information***
- ▶ Primary TELO controls school **Users**.
- ▶ Primary TELO & Secondary TELO receive Daily Digest emails by default.\*
- ▶ Student applicant/parent employees: no more status email notifications



# Understanding the New Enrollment Report & Required Review Process

- ▶ Spring Enrollment Review: Complete by January 30, 2025
  - ▶ Participation fee invoices: 2/16/25
- ▶ Underlying Assumption: a first-time TE recipient has 8 semesters of eligibility
- ▶ Once Import school marks a student Enrolled for the first time, they remain enrolled until the Import school reports otherwise (or Export school marks them as “No Longer Eligible”).
- ▶ Report **exceptions** only (withdrawals, denials, etc.).
- ▶ **Import schools** update any **NEW** students for Spring 2025 to **Enrolled**.
- ▶ No more annual recertification!



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# Enrollment Report Required Review Process: IMPORTS

- ▶ **Step One:** Review all **Imports** to confirm they are enrolled for spring.
  - ▶ A) “Review” all *Continuing* students to confirm *Enrolled*. Update any not enrolled to correct status; otherwise, no action required!
    - ▶ Two options for updates: Select application and then click pencil icon under “Actions”, disc icon to save change OR click to open the application, click “View Application”, update the Import Status and click “Update App” in bottom right corner to save.
- ▶ **Step Two:** Review and update Import Status\* for all NEW Spring 2025 entering cohort students. (instructions above)
  - ▶ If they did not enroll, update their Import status
- ▶ FACHEX Schools: Confirm the *Program Type* (TE/FACHEX) is accurate. TE is the default program. Update as necessary (under *Imports/Applications*).
- ▶ Double check! Obtain a list from Financial Aid or Student Accounts of all students with a 2024-2025 TE (or FACHEX) Scholarship and ensure they appear on your Import list as Enrolled!



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# Enrollment Report Required Review Process:

## EXPORTS

- ▶ **Step Three:** Review all **Exports** (2023-2024 and 2024-2025) to confirm they are still eligible for TE consideration based on your institution's requirements. Send list to HR to review.
  - ▶ If not eligible, go to *Exports/Applications*, click the box next to student's application, click the pencil icon under *Export Status* column and update *Export Status* accordingly, then click the disc icon to save change.
- ▶ *Eligibility Remaining* field is calculated based on the *Student Classification* selected by student on Initial TE EZ-Application.

Student Classification	Semesters of Eligibility
First year, never attended college	8 (or 7 if spring term start)
First year, attended some college	8 (or 7 if spring term start)
Second year/sophomore	6 (or 5 if spring term start)
Third year/junior	4 (or 3 if spring term start)
Senior/5 <sup>th</sup> year student	2 (or 1 if spring term start)
Graduate/Professional	4 (or 3 if spring term start)

\*FACHEX schools: Confirm the Program Type (TE or FACHEX) is accurate. Update as necessary.



# Export Status Options

- ▶ **Awaiting Export Decision**=EXPORT TELO has not reviewed or confirmed the student's application
  - ▶ Only the Export school and student can see the application in this status
- ▶ **Export Approved**=EXPORT TELO has reviewed and confirmed that the listed employee is eligible
- ▶ **Denied-Not an Employee**=EXPORT TELO reviewed application and employee is not currently employed or eligible
  - ▶ The Export school and student can see the application in this status
- ▶ **Denied-Min Reqs Not Met**=EXPORT TELO reviewed application and employee has not met eligibility requirements of the EXPORT school
  - ▶ The Export school and student can see the application in this status
- ▶ **Denied-Other**=EXPORT TELO has reviewed application and determined employee is not eligible
  - ▶ The Export school and student can see the application in this status
  - ▶ This option requires an explanation provided by the EXPORT TELO (explanation not seen)



# How A Student Appears on the Enrollment Report

- ▶ The **IMPORT** TELO marks student ENROLLED.
- ▶ If the student is no longer attending the Import school or has lost eligibility, it is the responsibility of the **IMPORT TELO** to update the student's record by closing the record.
- ▶ If a 2024-2025 applicant is not updated to "Enrolled" by the Import school by 6/3/25, the application will be closed.
- ▶ If parent is no longer considered an eligible employee (or the dependent is no longer eligible based on the school's definition), **EXPORT TELO** updates student's record.
- ▶ Leave of Absence students will appear on Enrollment Report.
- ▶ Students enrolled in the fall ONLY that you withdraw now will STILL appear on your Enrollment Report b/c they were enrolled for one term during the AY.





# The 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

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- **Recent enhancement:** DOWNLOAD REPORT button added-creates Excel file with two tabs.



# TE PULSE CHECK!



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# “Eligibility Remaining”

- ▶ **Eligibility Remaining** field (under Imports/Applications) updates when the student is initially marked as **Enrolled** based on **Student Classification** selected by student on TE EZ-Application.
- ▶ Pre-determined/Fixed “eligibility increments” occur in the system to update eligibility for **Enrolled** students on: December 31, March 15 (quarter/trimester schools only), May 31, August 15<sup>th</sup>.
- ▶ Field cannot be updated by the TELO or by the student once App is submitted

## Application Information

Student Classification Never attended college and 1st year undergraduate.	Eligibility Remaining 2
Export Status Export Approved	Export Status Date 06/15/2024

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.



# Deferred Admission, Summer School, Extending Eligibility

- ▶ **Admission Deferred:** Will likely need to do a new 2025-2026 application. If an Import app is not marked as Enrolled by Import school by 7/1/25, app will be closed.
- ▶ **Summer School:** If student uses TE during a summer session, the student uses a term of eligibility. Click “Add Summer Term” under Imports/Applications-will reduce Eligibility Remaining by 1.
- ▶ **Extend Beyond 8 Terms:** Student needs an add’l. year of eligibility to graduate: Click “Extend Eligibility” under Imports/Applications. Will extend eligibility 2 semesters.

Application Information

Submission Date 04/22/2024	Eligibility Remaining 6	Student Classification Never attended college and 1st year undergraduate.
Export Status Export Approved	Export Status Date 06/15/2024	
Import Status* Enrolled	Program Type* FACHEX	
Import Status Date 06/15/2024	Additional Import Schools Applied 0	

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.

[ADD SUMMER TERM](#) [EXTEND ELIGIBILITY](#)



# Leave of Absence

- ▶ Maximum LOA is one semester—if longer than that, app will expire and new app required.
- ▶ Import TELO goes to Imports/Applications, click pencil icon to update Import Status to *Leave of Absence* and click disc icon to save.

Tuition Exchange Portal

Import Applications

Current School: SAMPLE Exchange - Exchange City, NE | Application Year: All Aid Years | Import Status: All Import Statuses

Aid Year	Student Last Name ↑	Student First Name	Exchange Program	Import Status	Actions	Import Status Date
<input type="checkbox"/> 2025-2026	Covington	Kevin	TE	Denied - Other		11/21/24
<input type="checkbox"/> 2024-2025	Gilmore	Rory	TE	Import Decision Pending		09/10/24
<input type="checkbox"/> 2024-2025	Holman	Heather	TE	Leave of Absence		10/18/24



# Leave of Absence

- ▶ Enter LOA Begin/End Dates.
- ▶ If student is not re-enrolled within 15 days of the LOA End date, the system will close out the application, updating Import Status to *Withdrawn*.
  - ▶ TELO can extend update LOA End Date BEFORE it expires. Once date is past, it cannot be edited.

### Update Import Status

This will update the import school status to **Leave of Absence**. Please provide additional information below.

Leave of Absence Begin Date \*  

Leave of Absence End Date \*  

Must be within 9 months of begin date.

# Understanding the New Enrollment Report & Required Review Process

- ▶ Old system: Enrollment Report reflected a singular year
- ▶ New system: Snapshot of your students (both Exports & Imports) that are Approved Exports or Enrolled Imports
- ▶ Like all reports, based on student's **cohort year**
- ▶ Should *ALL YEARS* be selected, the report shows all students, regardless of the student's **cohort year**
- ▶ Remember: Application Year drop-down will only pull those in that year's cohort. **If you select 2024-2025 as the year, you will exclude those enrolled for current year if they have a cohort other than 2024-2025!**
- ▶ Could filter on *Eligibility Remaining, Aid Year*
- ▶ **No need to "Submit" any Enrollment Report to TE Central** but save/print a copy for your files
- ▶ Complete the review of your Exports & Imports by **January 30<sup>th</sup>!**



# Daily Digest Emails

- ▶ Daily Digest Emails **Exports** (FYI's except for first one that requires action):
  - ▶ "There are new export applications awaiting Export Decision action:"
  - ▶ "The following export students have been enrolled by Import School."
  - ▶ "Following export students have been put on LOA by Import School."
  - ▶ "Following export students have been denied by Import School."
  - ▶ "Following export students have been withdrawn by Import School."
- ▶ Daily Digest Emails **Imports**:
  - ▶ "There are new Import Decision Pending applications awaiting action."
  - ▶ "There are new Import Decision Pending transfer apps awaiting action."
  - ▶ "The following Import students have an LOA expiring in 7 days."
  - ▶ "The following Import students have been denied by their export school."
  - ▶ "The following student applications have been closed due to reaching maximum eligibility usage."



# Participation Fee Invoices

- ▶ Participation fee invoice (\$50/Export) generate February 16<sup>th</sup> based on **TE Exports Enrolled** for 2024-2025 year for the first time by their Import School (i.e.-new spring 2025 students or late fall 2024 students). Due upon receipt.
- ▶ Avoid Import school partners doing a second request for late Export fees after they already paid their initial Participation Fee invoice—complete your review by January 30, 2025.



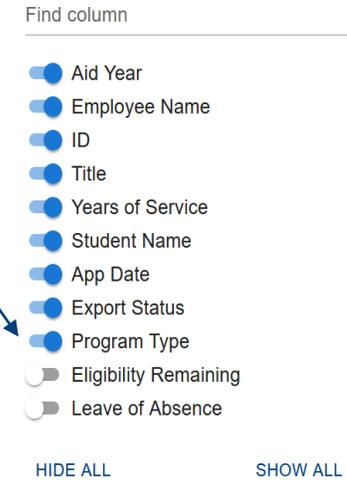
*\*FACHEX schools: Confirm the Program Type (TE or FACHEX) is accurate. Update as necessary.*



# Reports

## ▶ Types:

- ▶ Exports
    - ▶ Missing last names, titles, student DOB - Export school can populate
    - ▶ FACHEX Schools: click Columns to add "Program Type"
  - ▶ Imports
    - ▶ FACHEX Schools: click Columns to add "Program Type"
  - ▶ Tuition (your institution only) but you can select "All Schools" to get amounts for all institutions
  - ▶ Leave of Absence
  - ▶ Export Stat/Import Stat
  - ▶ Payments
- ▶ Can select "Application Year" and "Status" (Export/Import)
- ▶ Can add/remove columns, filter using conditional logic & export to .csv file



||| COLUMNS    ≡ FILTERS    ↓ EXPORT

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# Tuition Report

## Tuition

Current School:  Application Year:

☰ COLUMNS
☰ FILTERS
📄 EXPORT

Aid Year	School Name ↑	City	State	Tuition	Award Amount	Award Type
2023-2024	Abilene Christian University -TX	Abilene	TX	\$42,100	\$42,100	Full Tuition
2024-2025	Abilene Christian University -TX	Abilene	TX	\$43,900	\$43,900	Full Tuition
2025-2026	Abilene Christian University -TX	Abilene	TX	\$43,900	\$43,900	Full Tuition
2024-2025	Adelphi University - NY	Garden City	NY	\$42,090	\$42,000	Annual Set-Rate
2023-2024	Agnes Scott College - GA	Decatur	GA	\$48,480	\$48,480	Full Tuition
2024-2025	Agnes Scott College - GA	Decatur	GA	\$50,854	\$50,854	Full Tuition
2025-2026	Agnes Scott College - GA	Decatur	GA	\$50,854	\$50,854	Full Tuition
2024-2025	Alaska Pacific University - AK	Anchorage	AK	\$20,350	\$20,350	Full Tuition
2023-2024	American College of Thessaloniki - GR	Thessaloni...	GR	\$11,250	\$11,250	Full Tuition
2024-2025	American College of Thessaloniki - GR	Thessaloni...	GR	\$11,250	\$11,250	Full Tuition
2023-2024	American University - DC	Washington	DC	\$55,724	\$41,000	Annual Set-Rate
2024-2025	American University - DC	Washington	DC	\$57,952	\$42,000	Annual Set-Rate
2025-2026	American University - DC	Washington	DC	\$57,952	\$43,000	Annual Set-Rate
2023-2024	Anderson University - SC	Anderson	SC	\$32,710	\$32,710	Full Tuition



# Change Logs

- ▶ Application, Export & Import
- ▶ Be sure to select *Time Frame* field drop-down or no results!

Tuition Exchange Portal

SAMPLE Exchange  
Elizabeth Rih Lewinsky Photo  
Sign Out

Application Information Change Log Report

Current School: SAMPLE Exchange - Exchange City, NE

Time Frame: 3 Months

Application Year: All Years

School	Student Last Name	Student First Name	Aid Year	Application Status	Value	Old Value	New Value	Change Date	Modified By
SAMPLE Exchange	Covington	Kevin	2025-2026	OPEN	Terms Of Eligibility		0	11/21/2024	Rose Clinton
SAMPLE Exchange	Covington	Kevin	2025-2026	OPEN	Import Status Other Reason		He applied to a sample school in the school list.	11/21/2024	Elizabeth Rih Lewinsky
SAMPLE Exchange	Gilmore	Rory	2024-2025	OPEN	Terms Of Eligibility		0	11/21/2024	Elizabeth Rih Lewinsky
SAMPLE Exchange	Holman	Heather	2024-2025	OPEN	Terms Of Eligibility	8	8	10/18/2024	null null
SAMPLE Exchange	Cat	Wendy	2024-2025	OPEN	Terms Of Eligibility		8	09/18/2024	Elizabeth Rih Lewinsky
SAMPLE Exchange	Lewinsky	Mike	2024-2025	OPEN	Employee Firstname	Test	Tommy	09/11/2024	Elizabeth Rih Lewinsky
SAMPLE Exchange	Lewinsky	Mike	2024-2025	OPEN	Employee Lastname	Test	Lewinsky	09/11/2024	Elizabeth Rih Lewinsky
SAMPLE Exchange	Lewinsky	Mike	2024-2025	OPEN	Employee Title	Test	VP for EM	09/11/2024	Elizabeth Rih Lewinsky
SAMPLE Exchange	Cat	Wendy	2024-2025	OPEN	Terms Of Eligibility		0	09/09/2024	Elizabeth Rih Lewinsky
SAMPLE Exchange	TestLiz	TestLiz	2024-2025	CLOSED	Export Status Other Reason		separating	09/06/2024	Elizabeth Rih Lewinsky
SAMPLE Exchange	TestLiz	TestLiz	2024-2025	CLOSED	Terms Of Eligibility		0	09/05/2024	Elizabeth Rih Lewinsky
SAMPLE Exchange	TestLiz	TestLiz	2024-2025	CLOSED	Import Status Other Reason		not enrolled	09/05/2024	Elizabeth Rih Lewinsky

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- ▶ Import application disappeared? Import Change Log will show if student removed your school from their app!

Import Status Change Log Report

Current School: Saint Joseph's University - PA - Philadelphia, PA

Time Frame: 3 Months

Application Year: 2025-2026

School	Student Last Name	Student First Name	Aid Year	Application Status	Old Import Status	New Import Status	Change Date	Modified By
Saint Joseph's University - PA	Hannah	Hannah	2025-2026	OPEN	Import Decision Pending	Removed From Application	11/19/2024	Hannah

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# TELO System Enhancements

- ▶ Separated First Name and Last Name on Application views.
- ▶ Export school TELO contact info. "hover" under *Imports, Applications*, right hover over Employer field

The screenshot shows the 'Tuition Exchange Portal' interface. On the left is a navigation menu with options like School, Exports, Imports, Applications (highlighted), Transfer Applications, Closed Applications, Billing, Reports, Change Logs, Training, and Settings. The main content area is titled 'Student Information' and contains several input fields: Student First Name, Student Middle Initial (A), Student Last Name (Jones), Country (The United States), Address 1, Address 2, City (Alexandria), State (VA), Phone, Birthdate (Month 06), and Employee Information. The Employee Information section includes an Employer dropdown menu (American University - DC - Washington, DC) and First/Last Name fields. A red arrow points to a tooltip that appears over the Employer field, displaying the text: 'TELO: Dareliz Wong - dwong@american.edu'.

- ▶ Daily Digest Emails triggered at User setup for non-TELO Users.
- ▶ Enrollment Report downloaded into one Excel file vs. two.

# TE Updates

- ▶ Over 1,103 students and parents attended one of our 6, live TE Fall Family Webinars in October, November and December! Stay tuned for our Spring Family Webinar Series!
- ▶ New, comprehensive **TE Handbook** & **TELO System Guide** released in November.
- ▶ The **TAB** (TELO Advisory Board) launched in December!
- ▶ **TELO Tuesdays@2:00** for 2025! One-hour sessions offered the 2<sup>nd</sup> Tuesday of every month in 2025. Register [HERE!](#)
- ▶ Tuition Exchange will have a new website in March & TE Express Student Search Platform!
- ▶ **TE Tickler** newsletter
- ▶ Questions you can't find answer to at

[www.tuitionexchange.org/TELO-FAQ?](http://www.tuitionexchange.org/TELO-FAQ?) Contact [info@tuitionexchange.org](mailto:info@tuitionexchange.org)



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# Questions?

Thank you for your time and attention!

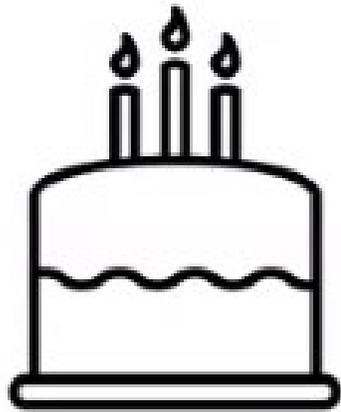


Scan QR Code for a copy of PowerPoint



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