

Fall Enrollment Review Process for TELOs



Heidelberg University - OH

Fall 2025

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Today's Agenda:

- TELO System Reminders
- Enrollment Review Process: Who, What, When & Where!
- Eligibility Remaining
- Deferred Admission, Summer School, Extending Eligibility, Leave of Absence
- Daily Digest Emails, Reports & Change Logs
- Q&A



TELO System Reminders:

- **Cohort year:** Year student begins receiving TE. **Stagnant.**
 - Old TELO system-ALL **continuing** students moved with cohort year of **2023-2024**
- Continuing students **DO NOT** re-apply each year.
 - Exceptions: transferring & parent separation from employer
- **TELOs** control whether their school is grayed out on TE app
 - Export & Import application deadlines under ***Annual Aid Year School Information***
- Primary TELO controls school **Users**
- Students: No status email notifications



Enrollment Review: Who, What, When & Where!

- 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** 2025-2026 cohort students to *Enrolled* if they enrolled for fall 2025. All other new 2025-2026 students who did not enroll must also be updated.
- No more annual recertification!



**Fall Enrollment
Review Due
September 30,
2025**



Enrollment Review: EXPORTS



- **Step #1:** Review **Exports** (ALL years) to confirm they remain eligible.
 - Send list to HR to review.
 - If no longer eligible, update Export status.



Enrollment Review: **IMPORTS**

- **Step #2:** Review all **Continuing Imports** to confirm fall enrollment.
 - Update any not enrolled to correct status; otherwise, no action required!
- **Step #3:** Review & update all **NEW** Fall 2025 entering Imports.
 - “Enrolled” Import status available 8/15/25
 - Update to “Enrolled” Import status if enrolled.
 - Update to appropriate Import status if *NOT* enrolled.
- FACHEX Schools: Confirm *Exchange Program* (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 2025-2026 TE (or FACHEX) Scholarship and verify they appear on your Import list as Enrolled!



Enrollment Review: **LAST STEP!**

- **Step #4:** Go to *Reports, Enrollment*, check box/enter date “2025-2026 Fall Enrollment Review Complete”
 - Complete **by September 30th!**
 - Download Enrollment Report and save copy for your records
 - **Do not select a year!** Remember: Application Year drop-down will only pull those in that year’s cohort.
 - **If you select 2025-2026 as the year, you will exclude all CONTINUING TE Scholars.**
 - **First 100** to submit fall enrollment report entered into a raffle for a \$50 Amazon gift card!

New Step!!



**TUITION
EXCHANGE.**
Open doors.
New opportunities.

Who Appears on Your Enrollment Report?

- Your **Exports** that are **Export Approved** & **Enrolled** by their Import school.
- Your **Imports** that are **Enrolled** at your school.
- Your **LOA** students.

Enrollment Report						
Export						
Year	First Name	Last Name	Import School	Export Status	Export School	Export Status
2023-2024	John	Doe	Import School	Export Approved	Export School	Enrolled
2023-2024	Jane	Doe	Import School	Export Approved	Export School	Enrolled

Enrollment Report						
Import						
Year	First Name	Last Name	Import School	Export Status	Export School	Export Status
2023-2024	John	Doe	Import School	Export Approved	Export School	Enrolled
2023-2024	Jane	Doe	Import School	Export Approved	Export School	Enrolled

Reminders:

- 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 Import status.
- 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.
- If a 2025-2026 applicant is not updated to "Enrolled" by the Import school by 6/30/26, the application will be closed.





“Eligibility Remaining”

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

Student Classification	Semesters of Eligibility
First year, never attended college	8 (or 7 if spring term start) (12 for trimester/quarter schools)
First year, attended some college	8 (or 7 if spring term start) (10 for trimester/quarter schools)
Second year/sophomore	6 (or 5 if spring term start) (9 for trimester/quarter schools)
Third year/junior	4 (or 3 if spring term start) (6 for trimester/quarter schools)
Senior/5 th year student	2 (or 1 if spring term start) (3 for trimester/quarter schools)
Graduate/Professional	4 (or 3 if spring term start) (6 for trimester/quarter schools)

Deferred Admission, Summer School, Extending Eligibility

- **Admission Deferrals:**

- Deferring a year? New App
- Deferring to spring? No new app required



- **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. semester of eligibility to graduate: Click “Extend Eligibility” under Imports/Applications. Will extend eligibility one semester.

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

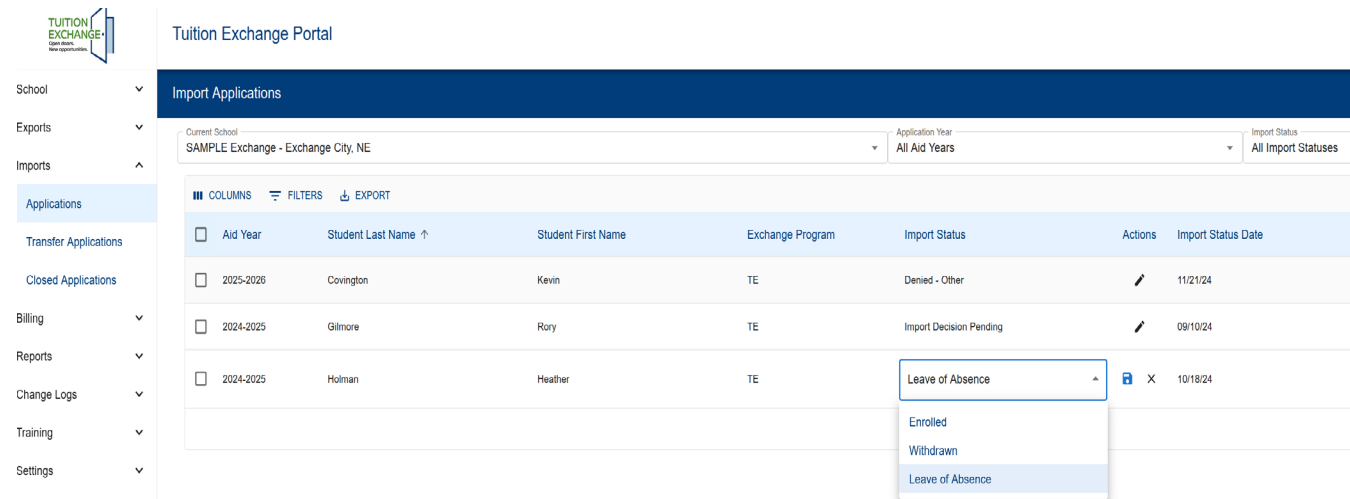
☐ I agree to allow the Export (employer) and Import (attending) school to share my Tuition Exchange information with the parent listed on my Tuition Exchange application.

ADD SUMMER TERM EXTEND ELIGIBILITY



Leave of Absence

- Maximum LOA is **9 months**—if longer than that, app will expire and new app required.
- Import TELO updates Import status to LOA

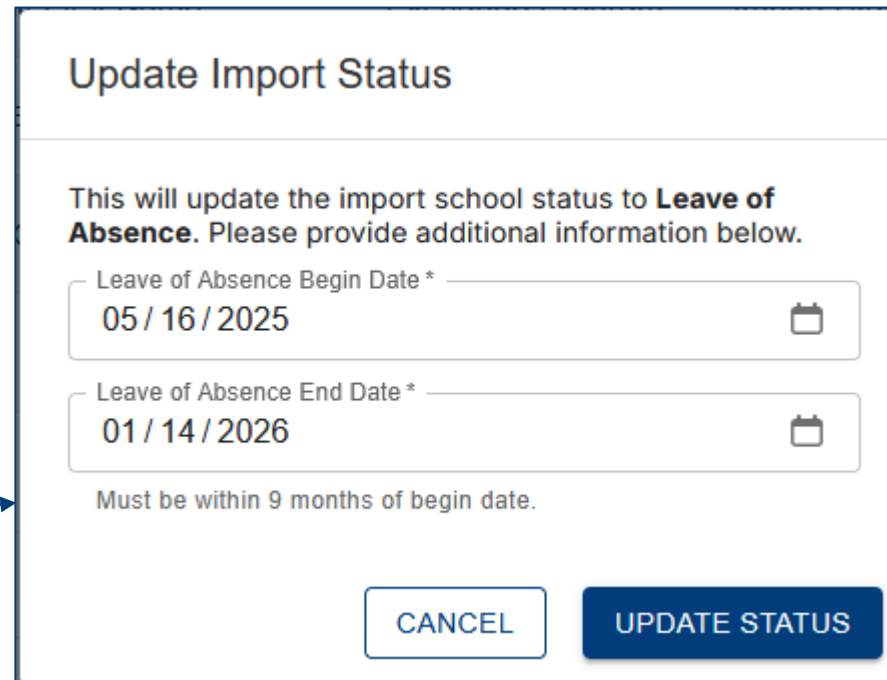


The screenshot displays the 'Tuition Exchange Portal' interface. On the left is a sidebar with navigation links: School, Exports, Imports, Applications (selected), Transfer Applications, Closed Applications, Billing, Reports, Change Logs, Training, and Settings. The main content area is titled 'Import Applications' and includes filters for 'Current School' (SAMPLE Exchange - Exchange City, NE), 'Application Year' (All Aid Years), and 'Import Status' (All Import Statuses). Below these filters is a table with columns: Aid Year, Student Last Name, Student First Name, Exchange Program, Import Status, Actions, and Import Status Date. Three rows of data are visible, each with a checkbox in the 'Aid Year' column. The 'Import Status' for the third row is 'Leave of Absence', and a dropdown menu is open for this cell, showing the same status and three other options: 'Enrolled', 'Withdrawn', and 'Leave of Absence'.

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	Gillmore	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.

Daily Digest Emails

- Daily Digest Emails **Exports** (FYIs 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

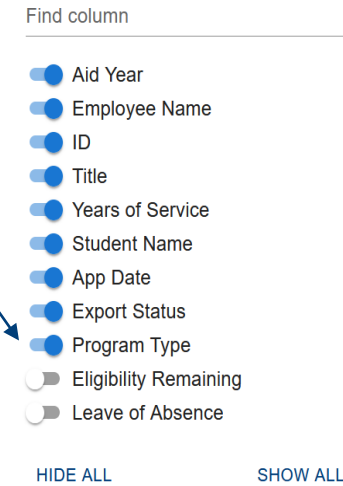
- Participation fee invoice (\$55/Export) generate October 16th based on **TE Exports Enrolled** for 2025-2026 year. Due upon receipt.
- Avoid Import school partners doing a second request for late Export fees after they already paid their initial Participation Fee invoice—complete your review by September 30, 2025.



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



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 Profile
Sign Out

Application Information Change Log Report

Current School: SAMPLE Exchange - Exchange City, NE

Time Frame: 3 Months Application Year: All Years

COLUMNS FILTERS EXPORT

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	6	6	10/18/2024	null null
SAMPLE Exchange	Cat	Wendy	2024-2025	OPEN	Terms Of Eligibility	0	6	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

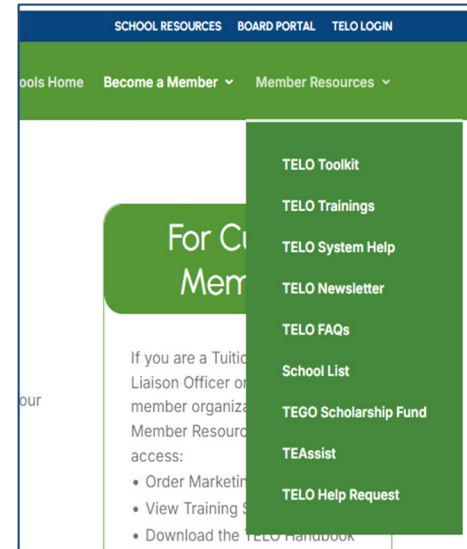
COLUMNS FILTERS EXPORT

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



TE Updates

- [Become a Featured School](#) in the [TE School Search](#)
- Please promote our [Fall Family Webinars!](#)
- Don't forget the [TELO Toolkit](#), [TE Handbook](#) & [TELO System Guide](#)
- The **TAB** (TELO Advisory Board) meets quarterly—your voices!
- **TELO Tuesdays@2:00** for 2025! One-hour sessions offered the 2nd Tuesday of every month in 2025. Register [HERE!](#)
- [TE Tickler](#) newsletter
- [TELO Help Request form](#)



TE Express Search

- Undergraduate data source: IPEDS
- Graduate data source: school survey (sent to TE schools offering TE @ grad level in March and June)
- More info. on TE Express Lead Generation/Featured School Option:

<https://docs.google.com/document/d/1sczB93Bk5DLUacL2hSJTwUYkO93192SL/edit>



Questions?



Scan QR Code for a copy of PowerPoint

or access direct link: <https://docs.google.com/presentation/d/1c6ajW-w0FXXvkcznwacqRRIPzFSN8gPT/edit?slide=id.p1#slide=id.p1>

Recording will be posted to tuitionexchange.org (Member Resources/TELO Training) by 9/20.



Thank you for attending!

