
TELO Annual To-Do Calendar

In addition to items listed below, TELOs should take action on Daily Digest email notifications throughout the year as required.

September

- Review your current Exports to ensure all remain eligible. This may require coordinating with Human Resources to verify continued employment.
- Review **Continuing** TE Scholar Imports to ensure they remain enrolled for the current term. Update their Import status if no longer enrolled by September 30th.
- Review your **new** 2024-2025 Imports and update the Import status to *Enrolled* for all those that did enroll (confirm enrollment with Registrar if necessary) and for those that did not enroll, update the Import status to what it should be by September 30th.
- Do a final review of your Enrollment Report and save a copy for your records.
- Consider hosting a faculty/staff TE information session. Use the [PowerPoint](#) provided by TE Central (update slides 6,7 as appropriate with institution-specific info.). Share Export deadlines and any internal TE application process beyond the TE EZ-Application with faculty and staff.
- Update any TE information sheet or application acknowledgement emails, TE offer/denial letters sent to Import applicants as new cycle begins.

October

- Begin to *Export Approve/Deny* any new Export applications for the next academic year.
- Review and pay Participation Fee invoice which generates in mid-October.
- Promote TE Fall Family Webinar series hosted by TE Central to faculty and staff.
- Take action on any outstanding Export applications from current year (stale application reminders generate on 10/15).

November

- Continue to *Export Approve/Deny* any new Export applications for the next academic year.
- Share Import Application information with Admissions. Determine timeline to begin review/make TE offers for upcoming year.

December

- Continue to *Export Approve/Deny* any new Export applications for the next academic year.
- Share Import Application information with Admissions.
- Pay any late Export application Participation Fees when invoice generates in mid-December.

January

- Send list of all current *Export Approved* students to Human Resources to confirm all remain eligible for the spring. Update the Export status for any *Export Approved* students as necessary (ex.-employee separated from the institution, update Export status to *No Longer Eligible* or *Denied-Other*).
- Review your current/Continuing Import Enrolled students to ensure they are registered for spring after classes begin, but by January 30th.
- Mark any LOA (leave of absence) students from fall that returned for spring as *Enrolled*.
- Review any new Imports for spring (i.e.-mid-year transfer students) and update their Import status to *Enrolled* if registered or to another appropriate status by January 30th.

February

- Review TE applicants for potential TE-GO nominations for upcoming year and submit to TE Central.
- Continue to work with Admissions to review new Imports for the following year, update their Import status to *Import Approved/Denied*, etc.
- Pay February Participation Fee invoice (if any new PFee's were assessed for late Enrollees or new, mid-year transfer students).

March

- Continue to work with Admissions to review new Imports for the following year and make TE offers, update Import status to *Import Approved/Denied*, etc.
- Take action on any outstanding Export applications from current year (stale application reminders generate on 3/15).

April

- Finalize new Import decisions for the upcoming year. Share list with Financial Aid Office so aid packages are updated accordingly.
- Pay April Participation Fee invoice (if any new PFee's were assessed for late spring Enrollees or new, mid-year transfer students).

May

- Respond to TE Central's post-May 1 TE spots available survey.
- Confirm all Import decisions and Export Approvals/denials for the year ending are up-to-date before the ending aid year closes in the system prior to July 1.

June

- Confirm with HR that all Exports remain eligible. Confirm all Import decisions for the prior aid year were accurate before the previous aid year closes in the TELO system.
- Provide Financial Aid Office with a final list of new students awarded TE Scholarships.
- Confirm any Continuing Import TE Scholars meet renewal requirements to receive scholarship (ex.-GPA requirement) and provide list to Financial Aid Office so financial aid packages accurately reflect awards.
- Update your **School Profile** in the TELO system, te.tuitionexchange.org, being sure to review all *Contacts* and **Users** to ensure roles are accurate.
- Complete the **Annual Aid Year School Information** for the aid year following the upcoming academic year, paying close attention to your Import and Export deadlines so that when the TE EZ-Application opens July 1 for the next cycle, your institution can be selected by employees' dependents and prospective students applying to your school. Review the **Annual Aid Year School Information** for the upcoming academic year as well.
- Pay June Participation Fee invoice (if any new PFee's were assessed for late spring Enrollees or summer students).

July

- TE EZ-Application opens for the aid year following the upcoming academic year. Post announcement for faculty/staff. Share any internal guidelines/deadlines on applying for TE.
- Pay July 1 annual membership dues invoice by July 31st.

August

- Review TE policy in staff/faculty handbook, on website if applicable, etc. and make any necessary updates before new cycle fully begins. See sample in [TELO Toolkit](#).
- Update any TE information sheet or application confirmation emails sent to Import applicants for the following academic year. See sample in [TELO Toolkit](#).