

2021-22

Program Guidelines

Work-Study Student

Mentorship Program

(WSMP)

60x30TX



Texas Higher Education Coordinating Board

Division of College Readiness and Success
Texas Higher Education Coordinating Board

TABLE OF CONTENTS

WORK-STUDY STUDENT MENTORSHIP PROGRAM	1
Program Authority and Purpose (19 TAC, Section 22.127)	1
Eligible Institutions (19 TAC, Section 22.129).....	1
PROGRAM PARTICIPATION REQUIREMENTS	2
Institution Requirements (19 TAC, Section 22.130)	2
Training Requirements (19 TAC, Section 22.130).....	2
ELIGIBILITY	3
Eligibility Requirements (19 TAC, Section 22.130)	3
Selective Service Statement (19 TAC, Section 22.3).....	4
AWARDING	5
AWARD ADJUSTMENTS AND OVER AWARD REQUIREMENT REMOVED	5
PROCESSING FUNDS	6
Required Matching (19 TAC, Section 22.129).....	6
Authority to Transfer Funds (19 TAC, Section 22.11).....	7
REPORTING	8
Reporting Requirements	8
APPENDIX 1: QUICK REFERENCES	9



WORK-STUDY STUDENT MENTORSHIP PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules.

The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

NEW: Statutes (TEC) and rules (TAC) periodically change and may affect the links referenced in this document. Copies of statutes and rules used to create these guidelines are available in [Appendix 1](#).

PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.127](#))

The Work-Study Student Mentorship Program (WSMP) is authorized by [TEC, Chapter 56, Subchapter E, Section 56.079](#). Rules establishing procedures to administer the program can be found in [Title 19 of the TAC, Chapter 22, Subchapter G](#). The purpose of WSMP is to provide employment to eligible students with financial need to mentor, tutor, or advise students at participating institutions of higher education or high school students within local school districts and nonprofit organizations. The primary goal of the program is to improve and increase student access, success, and completion of higher education and to provide employed WSMP students with an opportunity to gain and strengthen career readiness skills. These student mentor, tutor, and advising positions are funded by a combination of state appropriations provided by the Texas College Work-Study (TCWS) Program and matching funds from participating institutions.

ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 22.129](#))

Any public, private, or independent institutions of higher education as defined in [TEC, Section 61.003](#), except theological or religious seminary institutions, are invited annually to participate in the WSMP allocation process. Those choosing not to participate will not be considered in the allocation calculation for the applicable award year. Independent institutions of higher education offering only professional or graduate degrees are **NOT** eligible to participate in the WSMP.

PROGRAM PARTICIPATION REQUIREMENTS

INSTITUTION REQUIREMENTS ([19 TAC, SECTION 22.130](#))

To participate in the WSMP, an eligible institution must establish a Work-Study Student Mentorship Program designed to improve and increase student access, success, and completion of higher education and provide employed WSMP students with an opportunity to gain and strengthen future career readiness skills. Programs must be structured to offer on-campus or off-campus mentoring, tutoring, or advising services. Institutions should make every effort to incorporate services to underrepresented students.

Institutions that implement an **off-campus** program to serve local high school students must partner with school districts and nonprofit organizations through a Memorandum of Understanding (MOU). The MOU agreement details the roles and responsibilities of each participating entity and must be in place before program implementation. The institution must provide a copy of the MOU to the THECB ([sample MOU](#)).

Each Work-Study Student Mentorship Program must provide the following:

- part-time employment to eligible students as mentors, tutors, or advisors
 - salary requirements:
 - minimum of \$10 an hour
 - maximum of 20 hours per week
- training as determined by the THECB and Participating Institutions
- program oversight
- matching funds, including partner match (see [Required Matching](#) section)

TRAINING REQUIREMENTS ([19 TAC, SECTION 22.130](#))

Participating institutions must ensure that WSMP award recipients receive training that covers the following topics:

- overview of the THECB’s strategic plan and the role the recipient will play to help meet the goals and objectives of the plan
- overview of general knowledge around college access and completion
- overview of career readiness skills that could be attained during employment
- personal, public, economic, and societal benefits of higher education
- specific information about applying to college, including college exploration, the admission process, authoring personal essays, completing the financial aid process, and submitting college application forms
- overview of **ADVi**, a chatbot that uses artificial intelligence to provide support to Texans looking to attend or return to higher education

WSMP ACTIVITY EXAMPLES

- Provide information to high school students about higher education, including the college selection process, the application process, and financial aid options.
- Assist students in finding and using appropriate resources, such as the [College for All Texans website](#).
- Assist students in completing the Free Application for Federal Student Aid (FAFSA), ApplyTexas application, or other college applications.
- Assist in special outreach events, such as College Nights or FAFSA Saturdays.
- Assist college students with academic tutoring or mentoring.
- Assist with student interventions focused on increasing completion of degrees or certificates, such as interventions occurring through peer advising or supplemental instruction.
- Establish a student and parent outreach center through community partnerships and provide tools and information to help families make decisions about going to college.
- Encourage and assist students in their interactions with **ADVi** to help guide them through the college process.



STOP: To best understand the role and capabilities of **ADVi**, the THECB Virtual Advising Project will provide a demonstration of the chatbot. Please go to [askAdvi](#) and follow the steps under “Accessing ADVi” to request a demonstration.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.129](#))

Student WSMP eligibility requirements are the same as those in the Texas College Work-Study (TCWS) program. To ensure applicant eligibility, program leads should check with their financial aid office to determine whether students can be employed by the WSMP.

TO RECEIVE A WSMP AWARD, A STUDENT MUST:

- ✓ be classified by the institution as a Texas resident
- ✓ be registered with Selective Service, or be exempt
- ✓ have financial need
- ✓ be enrolled at least 1/2 time at the participating institution, in a plan leading to a degree or certification
- ✓ not be a recipient of an athletic scholarship (i.e., the student is obliged to play an intercollegiate sport as a condition of receiving the scholarship) during any semester the student is awarded WSMP funds
- ✓ not be enrolled in a seminary or other program leading to ordination or licensure to preach for a religious sect or to be a member of a religious order



STOP: To ensure compliance with program requirements, the THECB will conduct desk reviews and site visits. For information regarding records and retention, please refer to section 4.13 within the signed MOUs between participating Higher Education Institutions and the THECB.

The following program administration areas are overseen by the financial aid office:

- State Priority Deadline
- Selective Service Statement
- Calculating Award Amounts

ADDITIONAL INFORMATION

NON-TEXAS RESIDENT STUDENTS

Non-Texas resident students are not eligible to receive WSMP funds even if they are eligible to pay resident tuition.

NON-CITIZEN STUDENTS

A Texas affidavit (non-citizen) student who can provide the appropriate documentation proving eligibility to be employed in the United States may secure employment through the WSMP. This includes Deferred Action for Childhood Arrivals (DACA) recipients.

STATE PRIORITY DEADLINE

The THECB provides a uniform priority deadline ([TEC, Section 56.008](#) and [19 TAC, Section 22.6](#)) for applications that qualify for state-funded financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas (including Lamar State College-Orange and Lamar State College-Port Arthur), as defined in [TEC, Section 61.003\(3\)](#), must publicize and use **January 15** as the state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. Institutions may define how their students must meet the priority deadline and are encouraged to adopt a policy describing the actions that students must take to meet the deadline.

SELECTIVE SERVICE STATEMENT ([19 TAC, SECTION 22.3](#))

Male students must be registered with or exempt from Selective Service (SS) in order to be eligible to receive federal or state financial assistance. In accordance with [TEC, Section 51.9095](#), male students must file the required **Selective Service Statement of Registration Status** (found below) with their institution or other entity granting or guaranteeing financial assistance. This includes grants, scholarships, loans, or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is the statement NOT Required?

- **When the SS registration is confirmed through the Institutional Student Information Record (ISIR):** The ISIR confirmation serves as the student’s official, signed statement because the Department of Education validates registration directly with the Selective Service System (SSS).
- **When the SS registration is confirmed through the [SSS.gov website](#):** The institution can save the confirmation directly from the website to serve as the student’s official, signed statement on record.
- **When the ISIR confirms that a student is under the age of 18:** No statement or documentation is needed for the applicable award year, even if the student turns 18 during that year.

When is the statement REQUIRED, including all supporting documentation?

- When the student completes a Free Application for Federal Student Aid (FAFSA) but is flagged “not registered” on the ISIR and SS status **cannot** be confirmed on the [SSS.gov website](#).
- **When the student completes a Texas Application for State Financial Aid (TASFA):** The required statement is embedded in the TASFA and must be completed by the student.
- When the student does not complete a FAFSA or TASFA but applies for state financial aid, such as through exemptions or waivers, and SS status **cannot** be confirmed on the [SSS.gov website](#).

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student’s status will NOT change, the statement and supporting documentation can be used for subsequent semesters. (Example: The student entered the U.S. after the eligible age to register.)

If the student’s status is temporary, the statement must be collected each academic year until the student is registered or determined exempt. (Example: Student is under age 18 but did not complete a FAFSA or TASFA.)

RETENTION SCHEDULE

The status statement and all documentation must be retained in the student’s record for 7 years after the date of completion of the award period ([TEC, Section 441.1855](#)).

REPROCESSED ISIRS

If the student’s most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with the SSS was confirmed, the institution does not need to collect the status statement or any documentation.

Institutions may collect the required status statement and documentation either electronically or on paper. ([English Statement](#) or [Spanish Statement](#))

Male students must verify their current Selective Service registration status by marking one of the statements below and providing proof of their registration status to their current institution. Failure to do so may result in the loss of eligibility for state financial aid.
For more information about Selective Service System, visit [sss.gov](#).

I am under the age of 18 and not currently required to register.

<input type="checkbox"/> I am REGISTERED with the Selective Service and, <i>Check the following box that applies:</i> <input type="checkbox"/> I have already submitted proof of registration to my current institution. <input type="checkbox"/> Proof of registration is included with this statement. <input type="checkbox"/> I will submit proof of my registration. NOTE: Proof is required to be considered eligible for financial aid.	<input type="checkbox"/> I am EXEMPT from registration and, <i>Check the following box that applies:</i> <input type="checkbox"/> I have already submitted proof of my exemption to my current institution. <input type="checkbox"/> Proof of my exemption is included with this statement. <input type="checkbox"/> I will submit proof of my exemption. NOTE: Proof is required to be considered eligible for financial aid.
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I am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.
NOTE: Choosing this option may result in the loss of eligibility for state financial aid.

I, _____, hereby certify that the Selective Service status statement provided above is true and accurate.

Student ID: _____ Signature: _____ Date: _____

AWARDING

Funds awarded to the employed student are considered financial aid for the academic year in which the funds are earned and therefore cannot exceed the student's financial need.

In determining who should receive a WSMP award, a student's financial need must be calculated.

Financial Need is defined as the cost of attendance (COA) minus the expected family contribution (EFC) ([see 19 TAC, Section 22.1](#)).

Example 1:

$10,000 \text{ (COA)} - 3,000 \text{ (EFC)} = \$7,000 \text{ (Financial Need)}$

In this example, the student has financial need and may be eligible for a WSMP award up to \$7,000 for the academic year.

Example 2:

$10,000 \text{ (COA)} - 15,000 \text{ (EFC)} = -\$5,000 \text{ (No Financial Need)}$

In this example, the student has no financial need and is not eligible for a WSMP award for the academic year.



AWARD ADJUSTMENTS AND OVER AWARD REQUIREMENT REMOVED

In November 2020, TAC provisions pertaining to award adjustments and over awards were updated and no longer pertain to Texas College Work-Study programs.

Language in [19 TAC, Section 22.11 \(d\) and \(e\)](#) was updated to apply to grant programs only. Unlike state grant programs, work-study funds are paid based on hours earned and therefore awards are not eligible for adjustments.

Alert: The following sections from the **2020-21** Program Guidelines were removed:

AWARD ADJUSTMENTS ([19 TAC SECTION, 22.11](#))

Institutions may be required to make award adjustments in the following circumstances (see [NEW 19 TAC, Section 22.11](#)):

- Student officially withdraws from enrollment.
 - The institution will use the general refund policy to determine the amount of financial aid to be reduced.
 - A refund is not owed to the program if a student drops or withdraws after the end of an institution's refund period.
- Student's disbursement exceeds their eligibility amount.
 - Recalculate eligibility amount.

OVER AWARDS ([19 TAC SECTION, 22.11](#))

If an award has been disbursed and a student receives other assistance that exceeds the student's financial need, the institution is **not** required to adjust the award unless the sum of the excess resources is greater than \$300 (see [NEW 19 TAC, Section 22.11\(d\)](#)).

PROCESSING FUNDS

At the start of the fiscal year, each participating institution's full allocation of funds for the WSMP will be disbursed. Funds designated for public universities, health-related institutions (HRIs), and technical institutes will be transferred to each institution's cost center at the Comptroller's Office. Funds for community colleges and private/independent institutions will be sent to each institution's designated fiduciary institution via Electronic Funds Transfer (EFT).

WSMP funds may be issued to eligible students throughout the academic year, including summer. Funds may be used only for hourly wages paid to eligible student mentors, tutors, or advisors. Each biennium, funds not expended by the institution in the first year can be carried forward for use in the second year. Any carry-forward funds not expended in the second year of the biennium must be returned to the THECB. Although the WSMP has carry-forward authority, every effort should be made to expend funds within the same year that the funds are disbursed to the institution.

Carry Forward During the Biennium

FY 2022:

- State fiscal year begins September 1, 2021 and ends August 31, 2022.
- Unexpended FY 2022 funds can be *carried forward* into FY 2023.
- Unexpended FY 2022 funds **CANNOT** be *carried forward* into FY 2024.

NOTE: A *biennium* is defined as a two-year state budget period. Any carry-forward funds not expended in the second year of the biennium must be returned to the THECB.

REQUIRED MATCHING ([19 TAC, SECTION 22.129](#))

Participating institutions must provide at least a 10% match of a WSMP-employed student's wages. In addition, institutions are required to fund 100% of a student's employee benefits. Institutional funds used for the wage match and employee benefits must come from sources other than federal college work-study.

Institutions that are **eligible for Title III funds** from the U.S. Department of Education are **exempt from all matching requirements for the WSMP**. To qualify for this exemption, institutions must submit a current copy of the Title III eligibility letter to the THECB (see [Reporting Requirements](#)).

⚠️ ALERT: School district and nonprofit partners must contribute matching funds (either cash or in-kind) that are at least equal to the amount of the institution's contribution. The amount will be determined within the MOU with the participating WSMP institution. The school district and nonprofit partners must provide documentation of their matching funds to the institution.


IMPORTANT: School district and nonprofit partners are **exempt** from the matching requirements if the participating WSMP institution is exempt from the 10% match of a WSMP-employed student's wages.

AUTHORITY TO TRANSFER FUNDS ([19 TAC, SECTION 22.11](#))

Institutions participating in a combination of Work-Study Student Mentorship Program (WSMP) and one of the three state grant programs (TEXAS Grant, TEOG, and TEG), may transfer up to **10%** of the institution's total annual program allocation or **\$20,000** (whichever is less) between programs within the relevant fiscal year.

NEW: Institutions participating in both the WSMP and TCWS may transfer up to 25% between the two programs. This threshold applies to the program from which the funds are transferred.


Transfer requests are submitted online through [CONTACT US](#) (select "Financial Aid Question" under Contact Reason). Institutions requesting a transfer of funds must submit a request by **July 1, 2022**. The Financial Aid Services staff will respond to the institution to provide next steps for the process.

 **ALERT NEW:** Effective for the 2021-22 award year, the allowable amounts for the Authority to Transfer Funds process have changed as a result of the 87th Legislative Session. Institutions participating in a combination of TCWS or Work-Study Student Mentorship Program (WSMP) and one of the three state grant programs (TEXAS Grant, TEOG, and TEG), may transfer up to **25%** of the institution's total annual program allocation or **\$60,000** (whichever is less) between programs within the relevant fiscal year. Administrative rules for the Authority to Transfer Funds are being updated and will be available in 2022 for [19 TAC, Section 22.11](#).

REPORTING

REPORTING REQUIREMENTS

Participating institutions must report to the THECB the progress made by students being assisted through the WSMP. To comply with the Family Educational Rights and Privacy Act (FERPA), participating institutions must have the authority to gather, review, and report to the THECB appropriate data from all partners for evaluation purposes.

 **ALERT NEW REPORTING PROCESS:** Beginning June 5, 2021, WSMP institutions will submit program progress reports and applicable supplemental documents (e.g., Title III Waiver, Off-Campus MOU) through a WSMP Online Report Portal.

- WSMP institutions are no longer required to submit reports through the MOVEit system.
- Reporting templates provided on [Appendix 1](#) can be now used as a resource in preparation for portal submission.

Each institution designates a WSMP Online Report Portal account holder who will be responsible for submitting the required program progress reports. Portal account set up, instructions on how the portal functions, and how to submit report data are provided within the [WSMP Online Report Portal Instructions](#) resource section.

To meet the reporting requirements, institutions must submit a **Financial Report** and an **Annual Outcome Report** that collects aggregate information. The **Annual Outcome Report** includes a program overview, type of activities implemented, and Persistence Data.


Persistence Data includes each of the following:

- number of students employed as mentors, tutors, or advisors in the preceding year
- number of college students from the participating institution receiving mentoring, tutoring, or advising in the preceding year
- number of high school students receiving mentoring, tutoring, or advising from students of the participating institution in the preceding year.
- information relating to the costs of the program
- the academic progress made by each of the following in the preceding year:
 - students of the participating institution receiving mentoring, tutoring, or advising
 - high school students receiving mentoring, tutoring, or advising from students of the participating institution

The table below shows the due dates for the required reports. If the due date falls on a holiday or a weekend, reports are due on the following business day.

Financial Report and Annual Outcome Report		
Report	Reporting Period	Due Date
<ul style="list-style-type: none"> • Financial Report <ul style="list-style-type: none"> ○ Upload Title III Eligibility Letter if applicable 	September 1 - May 31, 2022	June 5, 2022
<ul style="list-style-type: none"> • Financial Report • Annual Outcome Report <ul style="list-style-type: none"> ○ Upload Off-Campus MOU if applicable 	September 1 - August 31, 2022	September 5, 2022

Note: Failure to meet the program reporting requirements may result in the loss of funding.

 **STOP:** The data submitted on the **Financial Report** will be used to reconcile totals submitted to the THECB on the **Financial Aid Database (FAD)**. To ensure data are reported accurately, program directors should reconcile expenditures with the campus financial aid office.

APPENDIX 1: QUICK REFERENCES

CONTACT INFORMATION	
<p>Vanessa Malo Program Director, College Success Phone: (512) 427-6267 Email: Vanessa.Malo@highered.texas.gov</p>	<p>Contact us by completing an online inquiry form and select “Financial Aid Question” as the Contact Reason.</p>
PROGRAM RULES AND STATUTES	
Texas Program Statutes	Texas Education Code TEC, Chapter 56, Subchapter E [PDF]
Texas Program Rules	Texas Administrative Code 19 TAC, Chapter 22, Subchapter A [PDF] 19 TAC, Chapter 22, Subchapter G [PDF]
WEBSITES, PORTALS AND GUIDES	
General program information for institutions	Student Financial Aid Programs Information Webpage
General college enrollment and financial aid information for students	College for All Texans
Reporting program data portal	CBPass Portal WSMP Online Report Portal Instructions [PDF]
Secure file transfer and processing portal	MOVEit DMZ MOVEit DMZ User Access Guide [PDF]
THECB Ask ADVi - About Us	https://www.askadvi.org/about/
THECB Ask ADVi - FAQs	https://www.askadvi.org/fag/
FORMS AND INSTRUCTIONS	
Spreadsheet for compiling data to complete Program Financial Report	Financial Report Template [XLSX]
Spreadsheet for compiling data to complete Program Annual Outcome Report	Annual Outcome Report Template [XLSX]
Sample Memorandum of Understanding (MOU) between institution and independent school district	Sample MOU [PDF]
Form for returning program funds	Special Programs Online Return of Funds Form
Instructions for issuing payments or refunds to the THECB	Refund Instructions