

## WSMP Institutional Online Report Portal Guide

The purpose of the Work-Study Student Mentorship Program (WSMP) Institutional Online Report Portal is to submit your institution's required program reports and supplemental documents applicable to the Texas Higher Education Coordinating Board (THECB). To access the WSMP Institution Online Report Portal, you must either have an active account with CBPass or create one. Follow the instructions provided throughout the portal guide to learn how to set up a portal account and how to navigate the report portal.

For questions or technical support, please email Vanessa Malo: [Vanessa.Malo@highered.texas.gov](mailto:Vanessa.Malo@highered.texas.gov)

**ALERT:** You must have an active account with the **CBPass** security management system to access this portal. If you already have a **CBPass** account, you must first *Request WSMP Portal Access*. If you do *not* have an account, you must create an account following CBPass Registration procedures.

Once you register *and* have access, you may log into the [WSMP Institution Portal](#) using your CBPass login credentials.

**CBPass registration steps for those who do not currently hold an account:**

1. Access the [CBPass login page](#):
2. Click on the **create one now** link.

3. The CBPass – New User Registration page displays.
4. Enter your First and Last Name.
5. Enter your institution's full name at **Affiliation**.

**Note:** The affiliation field shows institutions in our database as you type. Avoid typing "the" as the first word of your Affiliation. Be specific in entering your institution's full name in the affiliation field. For example, if your institution has multiple campuses, enter the full name, such as University of Houston – Downtown. Do *not* use Other as your Affiliation.

6. Enter your institution's Physical Address.
7. Enter your work Telephone Number.

## Example of step:

### CBPass - New User Registration

To create a CBPass account, enter the information below, then click on the *Register* button. Once you have registered you will be able to request access to applications.

All fields are required.

#### Account Information

\*First Name [required]:

\*Last Name [required]:

\*Begin typing to enter/modify your affiliation or type "Other" [required]:

\*Physical Address [required]:   
, TX  -

\*Telephone Number [required]: (  ) -  -

## Next Steps

8. Enter your work Email Address.
9. Enter your Username – Used at login.
10. Enter your Password – Used at login.

**Note:** Passwords must be at least eight characters in length and contain at least three of the four following attributes:

- an uppercase letter
- a lowercase letter
- a number
- a special character

11. Select and enter the answer to three security questions.

**Note:** If you would like a different selection of questions to choose from, Click **Generate a new list of questions**. Once you have selected three questions, click **Continue**.

12. Check that you agree to the CBPass Account Agreement. (*Required to register*)
13. Click Register.

**After you click the Register button, you will receive an acknowledgment email. If you do not receive the email notification promptly, please check your junk email folder for this message.**

### Example of step:

\*E-Mail Address [required]:

\*Re-Type E-Mail Address [required]:

\*User Name [required]:  (Used for login)

\*Password [required]:

Passwords must be at least eight (8) characters and contain at least 3 of the 4 following attributes: uppercase letter, lowercase letter, number, special character.

<b>Password Strength:</b>	Weak	Medium	Strong
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\*Re-Type New Password [required]:

\*Enter the answer to the math problem [required]:  $9+8=$

☐ [required] I agree to the [CBPass Account Agreement](#) (link opens in a new window)

Select three security questions to answer for password reset purposes. If you would like a different selection of questions to choose from, Click **Generate a new list of questions**. Once you have selected three questions, click **Continue**.

**Important:** All users must select and answer *three* security questions. Not doing this will cause issues resetting your password in the future.

### Example of step:

Please select 3 of the security questions below to be used for password reset and personal identification purposes:

#### Select

- ☒ What was the name of your first stuffed animal?
- ☐ In what city did you meet your spouse/significant other?
- ☒ What school did you attend for sixth grade?
- ☐ What is your oldest brother's birthday month and year? (e.g. January 1900)
- ☐ Where were you when you first heard about 9/11?
- ☐ What is the name of a college you applied to but didn't attend?
- ☒ In what city or town was your first job?
- ☐ In what city or town did your mother and father meet?
- ☐ What is your maternal grandmother's maiden name?

Answer the security questions you chose and click **Continue** to create your account. Click **Cancel** to go back to the list of security questions.

**What is the name of your first stuffed animal?**

Fluffy

**What School did you attend for sixth grade?**

King Middle School

**In what city or town was your first job?**

Austin

Continue

Cancel

## Request WSMP Portal Access – Instructions for those who have a CBPASS account already.

1. While logged into CBPass, click on the **My Access** tab.
2. Click **Request Access to another application**.
3. The request access window opens.

[Instructions ?](#)

### Request Access

Select Application: Accelerate Texas ▼

Request Access

Cancel

4. Scroll through the **Select Application** dropdown list and select **Work-Study Mentorship**.
5. Click **Request Access**. The system acknowledges your request and adds it to your access list with the status of **Requested**.

MY ACCESS

PROFILE

Select and view your current applications or request access to additional applications.

[Click to Request Access to another application](#)

[Instructions ?](#)

**Filters**

App ID:  App Name: All ▼ Owner:

App Status: All ▼ Access Status: All ▼ Role: All ▼

Record Count= 2

App ID	Application Name	Owner(s)	Delegate(s)/ Admin	Role	App Status	Access Status	
128	<a href="#">Accelerate Texas</a>			CBUser	Active	Requested	<a href="#">Remove Access</a>
110	<a href="#">Accountability</a>			CBUser	Active	Approved	<a href="#">Remove Access</a>

6. Once approved, you will receive an email notification. You may then open the application by clicking on the application in the table on the My Access tab or directly going to the application URL and logging in with your CBPass account credentials.

## WSMP Institution Online Report Portal Instructions

The purpose of the Work-Study Student Mentorship Program (WSMP) Institutional Online Report Portal is to submit your institution's required program reports and supplemental documents applicable to the Texas Higher Education Coordinating Board (THECB).

### Possible supplemental documents to be uploaded:

1. Institutions **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.
2. 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.
3. Any additional documents to share program accomplishments. This is not a WSMP program-required item.

### To BEGIN:

Log into the [WSMP Institution Portal](#) using your **CBPass** login credentials.

The portal *Home* page appears.

### Home page helpful information:

1. Click on **PORTAL INSTRUCTIONS** for user portal instructions.
2. For additional program information and guidelines, click on the **WSMP WEBPAGE** link.
3. Click on **SEND EMAIL** to direct questions to THECB.
4. Review the report information and schedule due dates to determine when to submit the appropriate report.

60x30TX WSMP Institution Portal Home Work Summary Uploads Program History Log off

## Work-Study Student Mentorship Program (WSMP)

Click on the Portal Instructions link provided below to review portal instructions. Please contact Vanessa Malo, WSMP Program Director for submission and portal assistance. Click on WSMP web-page button for further program information.

**PORTAL INSTRUCTIONS** **SEND E-MAIL** **WSMP WEBPAGE**

### WSMP Program Progress and Outcome Reporting


To meet the WSMP reporting requirements, institutions must submit a Financial, Program Summary, and Outcome Report that collects aggregate information within the WSMP Portal.

Institutions 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. This letter must be submitted once a year within the **Uploads** screen every June 5th.

## Work Summary

- To begin submitting reports, you will click on the **Work Summary Tab** at the top of the screen and select the report you will be working on. Each report screen has specific instructions.
- Under **Work Summary**, you can see all reports previously submitted to THECB for the program year in progress.
- Once the program year has ended and all have been submitted or reconciled, institutions can go to the **Program History Tab** to locate prior submissions, print, or save older reports.
- To begin a report, click on one the four create buttons seen in the example below. The report types that can be created through the Work Summary Tab are as follows:
  - FSR Term 1 - Financial Summary Report (September – May)
  - PSR Term 2 - Program Summary Report (September – August)
  - POR Term 2 - Program Outcome Report (September – August)
  - FSR Term 2 - Financial Summary Report (September – August)

**ALERT:** Term 1 and 2 represent the reporting period. Term 2 reports can be drafted and saved in advance. Term 2 reports cannot be submitted until Term 1 reports have been submitted and reconciled. Drafted, reviewed, submitted, and declined reports will appear within the work summary screen for the current program year. If there are any questions or concerns while the report is under review, institutions are notified by WSMP THECB staff, and the next steps will be provided at that time.


WSMP Institution Portal
Home
Work Summary
Uploads
Program History ▾
Log off

# Work Summary


Report Count: 2

Year	Term	Report Name	Status	Account Holder	Date	
2022	2	Program Summary	Drafted		04/05/2021 6:09 PM	REPORT DETAILS
2022	1	Financial Summary	Submitted		04/05/2021 5:38 PM	REPORT DETAILS

CREATE FSR TERM 1
CREATE PSR
CREATE POR
CREATE FSR TERM 2

## Uploads

WSMP Institutions will upload either required documentation or supplemental documents in a **PDF** format as requested or needed to this portal page. Refer to the reporting schedule on the home page for detailed report dates. To upload a document, press browse, locate the desired file, and press the upload button. Once the document has been uploaded, you can press the delete button, which will allow you to remove the file and upload a different file. The **DOWNLOAD** button will allow you to review the document you uploaded before you press **SUBMIT** at the bottom of the screen. Documents submitted to the THECB will now be available within the Program **History Tab** to be viewed, saved, or printed.


[WSMP Institution Portal](#)
[Home](#)
[Work Summary](#)
[Uploads](#)
[Program History](#)
[Log off](#)

# Uploads

Instructions: Institutions will upload either required documentation or supplemental documents as requested or needed to this portal page. Refer to the reporting schedule within the home page for detailed report dates. To upload a document, press the upload button, locate the desired file, and press upload. Once documents have been uploaded and the submit button has been pressed, documents can not be deleted and will be sent to the THECB. Uploads will no longer be accessible upon submission. Submitted uploads are accessible through the Program History Tab.

### Title III Eligibility Uploads

**ALERT:** Institutions 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.

Upload Count: 1

File	Year	Document Name	Account Holder	Date		
003615	2022	MindsetsDweck.pdf		04/07/2021 8:53 AM	<input type="button" value="DELETE"/>	<input type="button" value="DOWNLOAD"/>

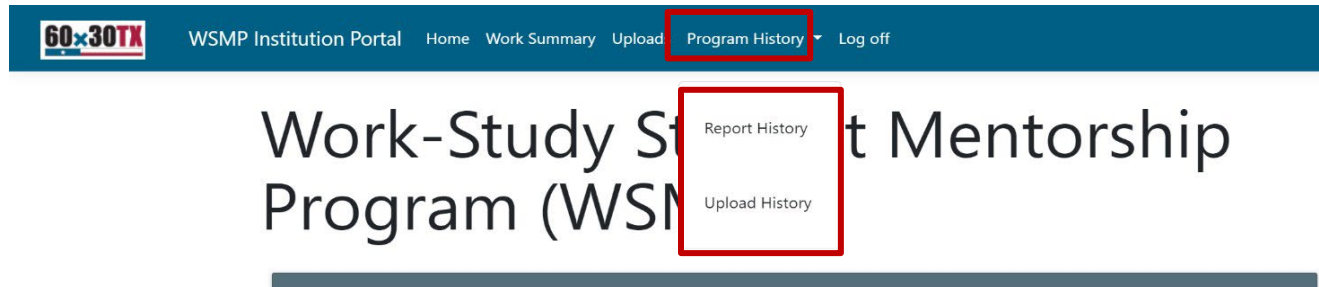


## Program History Tab

The Program History Tab is available to view previously submitted reports or uploaded documents by year.

1. Click on the Program History dropdown and select the desired report:

- Report History
- Upload History



1. Search for **Report History** by year.
2. Click **Run** and then **Report Details** to view previously submitted information.

## Report History

Filter:

Year:  ▼

Year	Term	Report Name	Account Holder	Date	
2019	2	Program Summary		04/05/2021 6:09 PM	<input type="button" value="Report Details"/>
2019	1	Financial Summary		04/05/2021 5:38 PM	<input type="button" value="Report Details"/>



## Program Summary

Please fill out your institution's **Program Summary** data, sign it, and submit the report to THECB.

Indicate the type of mentoring, tutoring, or advising activities implemented this year by selecting the activity type from the dropdown box provided below, reflecting your institution's WSMP program. If there are activity types that are not listed, please enter additional activity types within the "Share other activities."

**Note:** The system validates your entries upon submission and guides you through entering the required information. You may also save your summary information and complete it later, prior to submitting the report.

### Program Summary

**Instructions:** Program summaries are submitted once a year. WSMP requires MOUs to be in place with WSMP partnering school districts or nonprofit organizations. MOUs must be provided to the Coordinating Board, should clearly state the agreement period, and state with whom the agreement is with. An MOU sample template is provided within the WSMP Guidelines and within the MOU upload section of this report screen.

The Program Summary Report has a save while in the draft feature. Please press the save button as work is being completed to ensure work is not lost. After fifteen minutes, the system will automatically log out.

You will be able to click on the report history tab at the top of the screen to be able to see, print, and save submitted reports. If there are any questions or concerns while the report is under review, you will be notified by the WSMP THECB Program Director and next steps will be provided at that time.

Once you have completed the program summary report, please move forward, and complete the additional program outcome report (persistence of students served).

Program Structure and Students Served

Required

Type of Position Employed / Service Provided

Total Served

## Program Outcomes

Please fill out your Institution's **Program Outcome** data, sign it, and submit the report to THECB. WSMP Institutions will provide the persistence data of students served this year within the fields provided.

**Note:** The system validates your entries upon submission and guides you through entering the required information. You may now save your outcome information and complete it later.

### Program Outcomes

**Instructions:** Program outcomes are submitted once a year (September 5th). Institutions will provide the persistence data of students served this year. Please complete each section. Any data that you are not able to provide, please make a note in the comment section and provide an explanation.

The Program Outcomes Report has a save while in the draft feature. Please press the save button as work is being completed to ensure work is not lost. After fifteen minutes, the system will automatically log out.

You will be able to click on the Program History tab at the top of the page to be able to see, print, and save submitted reports. If there are any questions or concerns while the report is under review, you will be notified by the WSMP THECB Program Director and next steps will be provided at that time.

#### Secondary Outcomes

Please provide the persistence data of students served this year within the section provided below. The data provided will be based off of total students served unduplicated.

Any data that you are not able to provide enter zero and provide a note with an explanation in the comment section.

Total Students Served Unduplicated

Persisted the First Year to Sophomore Year

Persisted Sophomore Year to Junior Year

Persisted Junior Year to Senior Year

Graduated