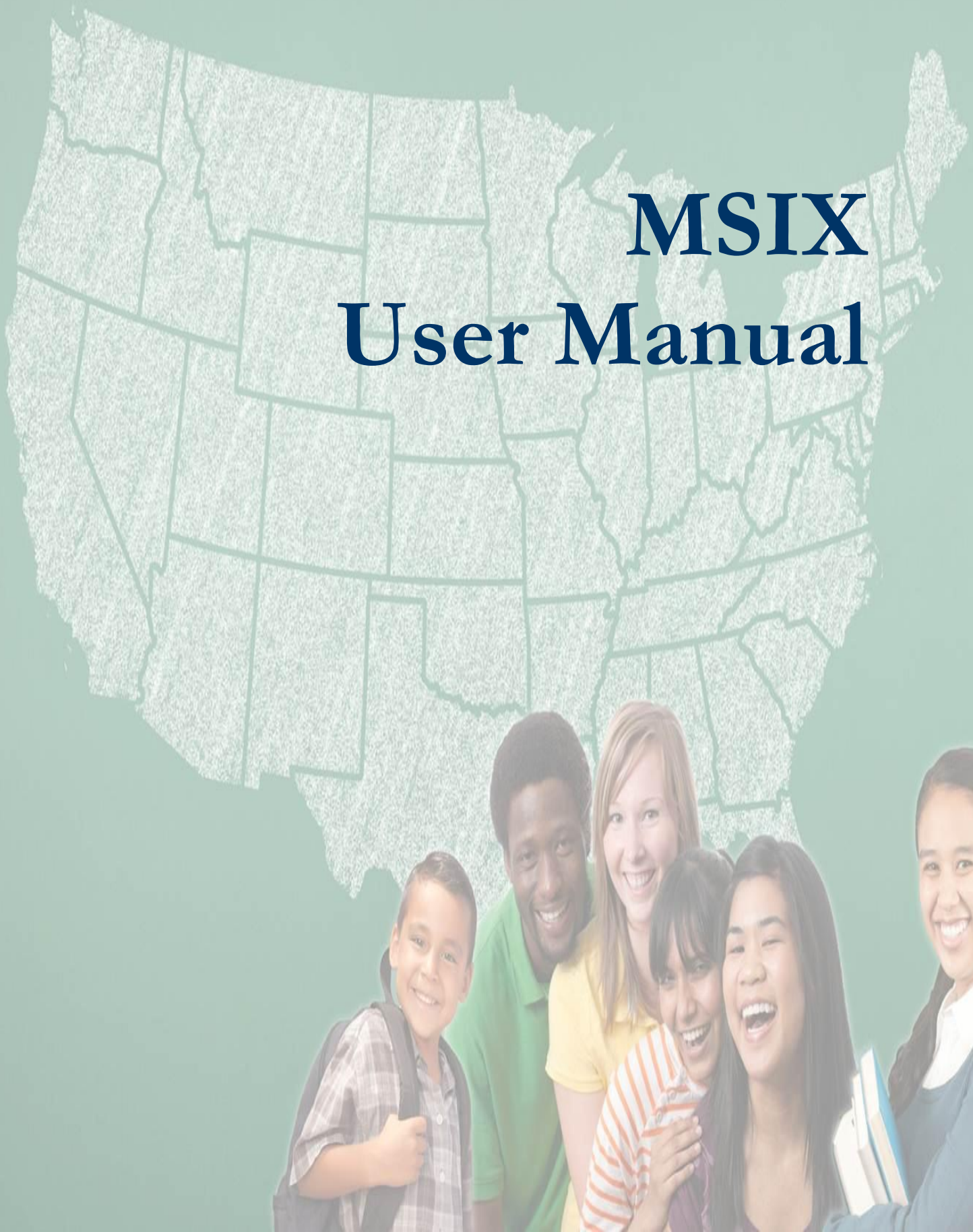
MSIX
User Manual



U.S. DEPARTMENT OF EDUCATION

MSIX User Manual

Version 6.9

August 2012

"MSIX IS ONLY AVAILABLE TO AUTHORIZED USERS"

MSIX
Migrant Student
Information Exchange

Table of Contents

Section 1: Overview 3

Introduction 3

MSIX Purpose 5

MSIX Requirements 5

User Roles and Responsibilities 5

Navigational Elements 8

Section 2: Getting Started 14

Gaining Access to MSIX 14

Preparing to be an MSIX User 15

Logging In 17

Logging Out 24

Managing My Account 25

Section 3: Searching, Printing Records, and Notifying 27

Searching and Displaying 27

Printing Student Records 45

Notifying of a Student's Arrival or Departure 51

Section 4: Generating Reports 58

User Administrator Reports 59

Data Administrator Reports 59

Primary & Secondary User Reports 61

Government Administrator Reports 62

Generating a Report 66
Section 5: Merging and Splitting Records 69
MSIX Data Management 69
Merging/Combining Student Records 71
Splitting/Separating Student Records 90
Escalating Merge and Split Requests 101
Reassigning Worklist Items 102
View Worklist History 107
Section 6: Regional Structure Administration 111
Creating a Region 111
Updating a Region 115
Disabling a Region 118
Accessing the State Region Consolidated View 122
Section 7: User Administration 124
Establishing User Accounts 124
Updating User Accounts 128
Resetting Passwords 132
Disabling or Deactivating User Accounts 135
Appendix A: Acronyms 140
Index 141

Section 1: Overview

Welcome to the Migrant Student Information Exchange (MSIX)! MSIX is an online system containing migrant student records from all participating states to facilitate the national exchange of migrant students' educational information among the states. MSIX is available to State Migrant Education Program (MEP) staff along with other users from the MEP Community. It does not replace existing migrant student information systems; however, it does work with existing systems to keep student records current. MSIX does the following:

- Produces a single "consolidated record" for each migrant child that contains information from each state in which the child was ever enrolled
- Contains the minimum data elements necessary for the proper enrollment, grade and course placement, and accrual of credits for migrant children

Section 1 will introduce you to the basics of MSIX to give you the foundation to understand its features and functions. This section includes the following topics:

- Introduction
- MSIX Purpose
- MSIX Requirements
- User Roles and Responsibilities
- Navigational Elements

Introduction

The timely transfer of education records for migrant children between schools has been a longstanding challenge. Migrant children often enroll in multiple schools for varying amounts of time each year as their families migrate in search of temporary or seasonal work in agriculture or fishing. MEP staffs continue to find it difficult to share and consolidate student information that schools, local educational agencies, and states collect on migrant children in a timely and meaningful way that helps school personnel make appropriate decisions when the students arrive. These conditions and those shown below prompted the need for an exchange of records.

- **High Movement** — Highly mobile migrant student population
- **Short Notice** — Students move from state-to-state often without notice
- **Lack of Data** — Timely and accurate educational information not always available

- **Placement Errors** — Students placed in incorrect courses or grades
- **Loss of MEP Services** — Students not provided the most beneficial MEP services

In response to this challenge and a Congressional mandate to link the existing migrant student information systems, the U.S. Department of Education (ED) implemented the Migrant Student Record Exchange Initiative. The goals of this initiative will:

- **Goal 1**: Create an **electronic exchange** for the transfer of migrant student education data among the States
- **Goal 2**: Promote the **use** of the MSIX application
- **Goal 3**: Ensure the use of the consolidated migrant student record for the purposes of **enrollment, placement, and accrual of credits** of migrant students
- **Goal 4**: Produce **national data** on the migrant population

At the heart of this initiative is the MSIX. The MSIX does not replace existing state migrant student record systems. Rather, it links them in a minimally invasive manner to collect, consolidate, and make critical education data available. The MSIX also leverages available information provided by the states to ED's Education Data Exchange Network (EDEN) system to ease the data collection burden on states.

MSIX offers many benefits to promote its usability. Some of those key features include the following:

- **Information** — Retrieve and view student information
  - Search, view, and print consolidated student records
  - Multiple search parameters
  - Accessible online
  - Printed reports available
- **Record Conflicts** — Identify and resolve student record conflicts
  - Student Merge workflow
  - Student Split workflow
- **Notification** — Alert other jurisdictions of planned student moves
- **Role-based** — Create users based on 'MSIX roles' to allow appropriate access to MSIX functions and student data
- **Structure** — Create regions within a state to manage MSIX activities and workflow

MSIX Purpose

The primary purpose of MSIX is to make migrant student information available to authorized school personnel to support them in making decisions on student enrollment, grade or course placement, and accrual of credits. A secondary purpose of MSIX is aggregation of information to analyze national trends.

MSIX Requirements

MSIX requires specific browser configuration. Your Internet browser should be set up so that it ***does not*** cache Internet pages. This will allow any MSIX updates and patches to be viewed on your computer. MSIX supports the use of four browsers: Internet Explorer v8.0 or higher, Firefox v11.0 or higher, Safari v5.1 or higher, or Google Chrome 16 or higher. The steps to configure each browser vary from version to version, so you should refer to the browser documentation to ensure the following settings are configured for your preferred browser:

1. Enable **JavaScript**
2. Accept **Cookies** from sites until they expire
3. Clear **Cache** every time browser is closed

MSIX also has specific requirements for downloads of the training content. Adobe Flash Player (version 9 or later) must be installed in order to view the online training modules. Adobe Flash Player is often part of the standard software provided with most computers. The flash player can be downloaded, free of charge, from www.adobe.com.

Users without access to Adobe Flash Player should reference the *MSIX User Manual* for guidance and information about using MSIX. This manual can be accessed from the training link in the Top Navigation menu as well as from the MSIX website in the Trainers' Corner, which is outside the application.

User Roles and Responsibilities

MSIX is used by personnel at the district, region, state, and national levels. MSIX is used mainly by the front-line educators that need migrant student data to make time-sensitive and appropriate decisions on enrollment, grade or course placement, and accrual of credits. These users are typically the local school registrars and counselors, or Migrant Education Program (MEP) specialists.

State MEP users also require access to MSIX; some of these users directly interface with migrant students and others provide administrative and technical support to the MEP. U.S. Department of Education (ED) personnel are also

MSIX users; however, ED requires MSIX for national trend and statistical analysis purposes only.

The table below identifies the specific user roles and responsibilities for MSIX. It includes a description of the user's MSIX job responsibilities, role functions available within the system, and the potential kinds of individuals who may perform in each role. A second table follows that provides essentially the same information but in a snapshot, abbreviated form.

MSIX User Roles and Responsibilities			
User Role	**Description**	**Functions Allowed**	**Potential Users**
School and District Level Roles			
MSIX Primary	MSIX Primary Users can query student records in all states. This user can also initiate the merge and split process for student records in his or her state.	• Search, display, and print student records for students in all states • Initiate merge and split of student records • Email notification of an arrival or departure of a student • Export Student Records to File • Generate Reports	• Guidance Counselors • MEP Data Entry Staff • Recruiters • Registrars • Teachers
MSIX Secondary	MSIX Secondary Users can query student records in all states.	• Search, display, and print student records for students in all states • Email notification of an arrival or departure of a student • Generate Reports	• Guidance Counselors • MEP Data Entry Staff • Recruiters • Registrars • Teachers
District Data Administrator	District Data Administrators can validate or reject near matches, merges and splits of student records. This user can also initiate the merge and split process for student records in his or her district.	• Search, display, and print student records for students in all states • Initiate merge and split of student records • Validate or reject record near matches, merges and splits • Resolve data quality issues • Respond to escalation requests • Email notification of an arrival or departure of a student • Export Student Records to File • Generate Reports	• State MEP Administrators • MEP Data Entry Staff
Regional Level Roles			
Regional Data Administrator	Regional Data Administrators can validate or reject near matches, merges and splits of student records. This user can initiate the merge and split process for student records in his or her region. This user will also serve as the secondary point of contact for escalation issues.	• Search, display, and print student records for students in all states • Initiate merge and split of student records • Validate or reject record near matches, merges and splits • Resolve data quality issues • Respond to escalation requests • Email notification of an arrival or departure of a student • Export Student Records to File • Generate Reports	• State MEP Administrators • MEP Data Entry Staff
Regional User Administrator	Regional User Administrators establish and manage user accounts for users in their region.	• Create User accounts • Assign User Role(s) • Update User account information • Deactivate User accounts • Reset passwords • Access user account-related reports	• State-identified

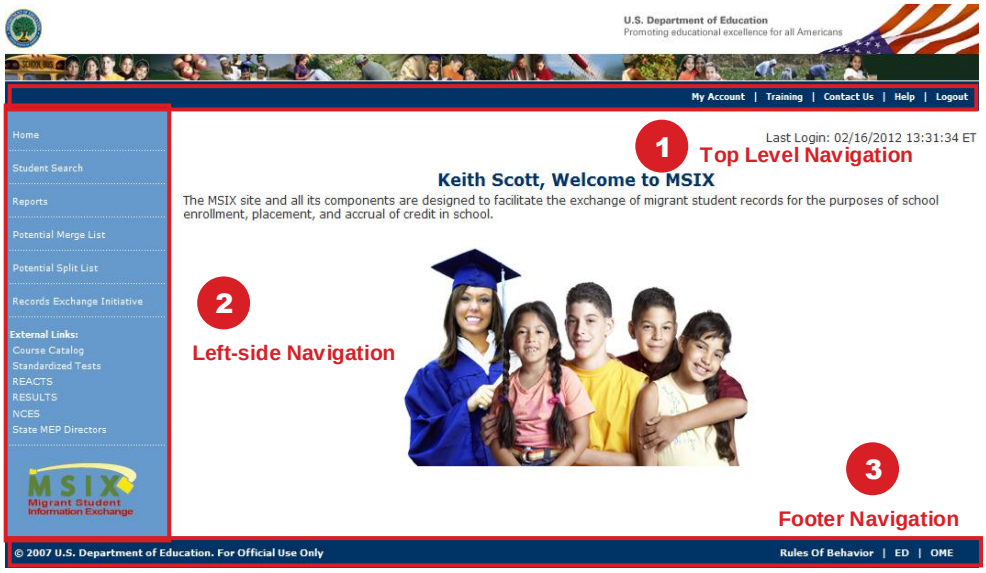
MSIX User Roles and Responsibilities			
User Role	**Description**	**Functions Allowed**	**Potential Users**
State Level Roles			
State Data Administrator	State Data Administrators can validate or reject near matches, merges and splits of student records. This user can initiate the merge and split process for student records in their state. He or she can also resolve data quality issues and serve as the primary point of contact for escalation issues.	• Search, display, and print student records for students in all states • Generate Reports • Initiate merge and split of student records • Validate or reject record near matches, merges and splits • Resolve data quality issues • Respond to escalation requests • Email notification of an arrival or departure of a student • Export Student Records to File	• State MEP Administrators • MEP Data entry staff
State User Administrator	State User Administrators establish and manage user accounts for users in their state.	• Create User accounts • Assign User Role(s) • Update User account information • Deactivate User accounts • Reset passwords • Access user account-related reports	• State-identified
State Region Administrator	State Region Administrator establishes and maintains the regional structure and associated districts for states that choose to use regions.	• Enable and disable regional structure • Create new regions • Associate districts to regions • Edit regions	• State MEP Administrators • MEP Data entry staff
U.S. Department of Education (ED) User Roles			
Government Administrator	Government Administrators can generate system reports on a State or National level. Government Administrators cannot access student data.	• Generate Reports	• OME
OME User Administrator	OME User Administrators establish and manage user accounts for all State User Administrators.	• Create user accounts • Assign State User Administrator role • Update user account information • Deactivate user accounts • Reset passwords • Access user account reports for all states	• OME
Privacy Act Administrator	Privacy Act Administrators can enter statements provided by students and parents that formally dispute the data contained in a student's MSIX record. They can also query and view student records from all states.	• Search, display, and print student records • Enter dispute statements into a student's MSIX record	• OME

Table 1.1: MSIX User Roles and Responsibilities

Function	Primary User	Secondary User	District Data Admin	Regional Data Admin	State Data Admin	State Regional Admin	Regional User Admin	State User Admin
My Account	X	X	X	X	X	X	X	X
Search, Display, Print & Export Student Records in all States	X	X	X	X	X			
Access MSIX Reports	X	X	X	X	X		X	X
Send Student Move Notices	X	X	X	X	X			
Initiate Student Merges and Splits	X		X	X	X			
Validate/Reject Student Merges and Splits			X	X	X			
Access District Worklist Items			X					
Access Region Worklist Items				X				
Access State Worklist Items					X			
Create/Modify State User Accounts								X
Create/Modify Regional User Accounts							X	X
Create/Modify School or District Level User Accounts							X	X
Reset Passwords							X	X
Enable Regional Functionality						X		
Create/Modify Regions						X		

Table 1.2: MSIX User Roles and Responsibilities – A Snapshot View

Navigational Elements



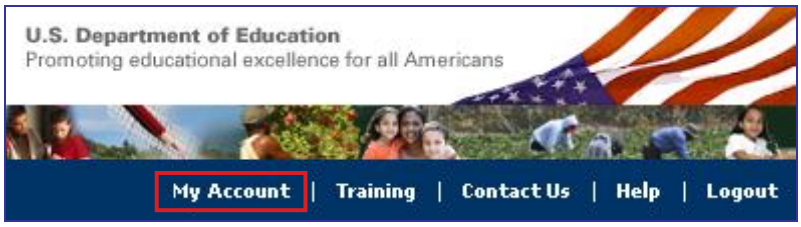
The MSIX navigational elements are the options on each page that allow you to choose where you wish to go within the MSIX application. The common navigational elements across MSIX are comprised of: 1) Top Navigation, 2) Left-

side Navigation, and 3) Footer Navigation. The sample above is shown from the Primary User's Home page and displays the available functions for that role in the Left-side Navigation.

Top Level Navigational Elements

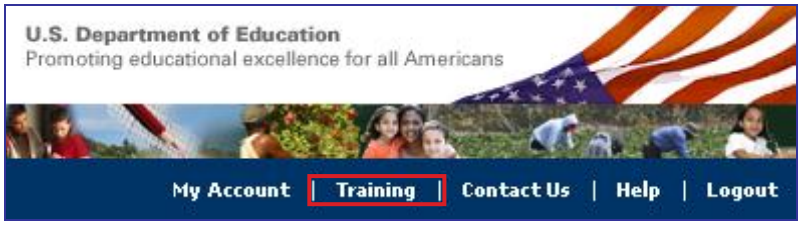
My Account

The My Account link navigates you to your MSIX account information. You can update your phone number or reset your password on this page. When you reset your password, MSIX will email you a new temporary password that you will change the next time you access MSIX.



Training

The Training link navigates you to the MSIX Training page, which contains online training for user roles, the MSIX User Manual, and the MSIX Quick Reference Guide, a job aide for MSIX functions used most frequently.



Contact Us

The Contact Us link navigates you to the Contact Us page, which contains contact information for the MSIX Help Desk along with other useful information. You can reach MSIX support via email (msixsupport@deloitte.com) or the MSIX Help Desk (**1.866.878.9525**) on Monday thru Friday from 9:30AM to 6:30PM Eastern Time. ***Note***: the Help Desk does not reset passwords, create new users, deactivate, or disable existing users.

Help

The Help link navigates you to the searchable MSIX online help, Frequently Asked Questions (FAQs), and Technical Reference Materials.

Logout

The Logout link you outside MSIX to end your MSIX session.

Left-side Navigational Elements

The links in the Left-side Navigation Menu will vary from user to user based upon their role. For instance, only State and Regional User Administrators will see the User Administration link on the Left-side Navigation Menu. The sample shown below includes every link and is not found in any one user role.

Home

The Home link navigates you to the MSIX home page.

Student Search

Student Search is a role-based link that navigates you to the MSIX "Basic Student Search" page. The search page allows you to query for student information. This link is available for Primary Users, Secondary Users, State Data Administrators, Regional Data Administrators, and District Data Administrators.

Reports

Reports is a role-based link that navigates you to the reports section of MSIX and will list reports that might be available to you. This link will only appear on the left navigation panel for User Administrators, Data Administrators, Primary User, Secondary Users, OME User Administrators, and Government Administrators. Upon clicking the link, the user is taken to a page where, depending on role, he or she may choose to view different reports based on data in MSIX.

Regional Administration

Regional Administration is a role-based link that navigates State Region Administrators to the "Regional Structure Administration" page. This page allows those users to create, update, add or disable a regional structure and associated districts for states that choose to use the regional structure. This link is only available to State Regional Administrators.

Worklist

Worklist is a role-based link that allows users to take action on near matches, merges, and splits. This link is available for State Data Administrators, Regional Data Administrators, and District Data Administrators.

Potential Merge List

Potential Merge List is a role-based link that navigates you to the list of students you have identified for a potential merge. The merge process is initiated for these students in this section of MSIX. This link is available for Primary Users, State

Data Administrators, Regional Data Administrators, and District Data Administrators.

Potential Split List

Potential Split List is a role-based link that navigates you to the list of student records you have identified for a potential split. The split process is initiated for these students in this section of MSIX. This link is available for Primary Users, State Data Administrators, Regional Data Administrators, and District Data Administrators.

User Administration

User Administration is a role-based link that navigates you to the User Administration section. This section allows you add, update, disable, or deactivate MSIX users. This link is available for State User Administrators, Regional User Administrators, and OME User Administrators.

State Profile

The State Profile link is a role-based link that navigates you to your state's migrant profile. The document provides contact information for the state MEP staff and other relevant information on your state's migrant profile. Each state is responsible for updating this data and sending it to the MSIX Help Desk. This link is only available to State Data Administrators.

Records Exchange Initiative

The Records Exchange Initiative link takes you to the OME Records Exchange website.

External Links

The External Links section of the Left-side Navigation links you to additional websites that are available outside of the MSIX application. The external links are as follows:

- **Course Catalogs** — The Course Catalog provides links to state course catalogs.
- **Standardized Test** — The Standardized Test provides links to state standardized test lists.
- **The Records Exchange Advice, Communication, and Technical Support (REACTS)** — The REACTS link navigates the user to the REACTS homepage, which provides resources to assist States in implementing a state-wide migrant records exchange program, a central location for all records exchange communication materials, a central calendar for records exchange events and related activities , and information on the benefits of records exchange to migrant educators, recruiters, counselors, migrant parents and students.

- **RESULTS** — The RESULTS link navigates the user to the RESULTS homepage, which is a Customer Service Center website that provides a range of information to the migrant community and migrant education program to enhance inter- and intrastate coordination and collaboration.
- **National Center for Education Statistics (NCES)** — The NCES is located within the ED and the Institute of Education Sciences. It is the primary federal entity for collecting and analyzing data related to education. MSIX uses the standard NCES codes that are available on the NCES website. For more information about NCES, click the "NCES" link or go to (http://nces.ed.gov).
- **State Migrant Education Program (MEP) Directors** — The State MEP Directors link provides a list of the State MEP Directors along with their contact information.

Footer Navigational Elements

Rules of Behavior

This link provides the Rules of Behavior (ROB) that all users must accept before accessing MSIX. The ROB describes your responsibilities and expected behavior with regard to information and information system usage. They include the following sections: Responsibilities, Monitoring, MSIX Security Controls, User Credentials, Protection of MSIX Information, and Other Security Considerations.

ED

The ED link navigates you to the U.S. Department of Education (ED) website. The URL is http://www.ed.gov.

OME

The OME link navigates you to the Office of Migrant Education website. The URL is http://www.ed.gov/about/offices/list/oese/ome/index.html.

Section 2: Getting Started

Now that you understand the basics of Migrant Student Information Exchange (MSIX), you need to learn how to begin and what steps are needed to gain access and become an MSIX user. However, even before you become a user, you can become familiar with some of the tools and resources available for MSIX. Once you receive your User Name and Password, you will want to know how to log in, log out, and how to manage your user account. This section includes the following topics:

- Gaining Access to MSIX
- Preparing to be an MSIX User
- Logging In
- Logging Out
- Managing My Account

Gaining Access to MSIX

Information is found on the MSIX website (https://msix.ed.gov) to enable you to apply for access to MSIX under the "How do I get an account?" link. Here, you will find the *MSIX User Access Guide and Application*, which includes a sample application form and describes the MSIX Application Procedure. This procedure is composed of three processes: Applicant, Verifying Authority, and Final Approving Authority and assumes that Training occurs at any time within.

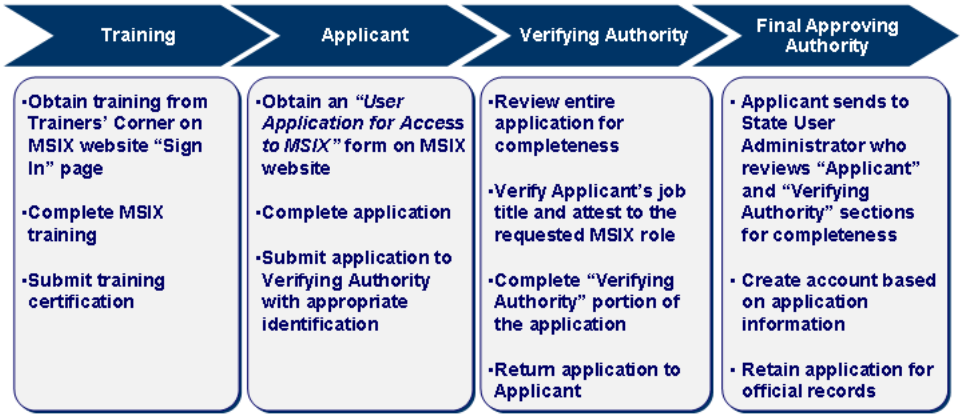


Figure 2.1: MSIX Application Procedure

These processes are discussed in further detail in the aforementioned guide to provide the steps for obtaining access to MSIX. In addition, the "User

Administrator Search" function is found so that you can determine where to submit your application.

Preparing to be an MSIX User

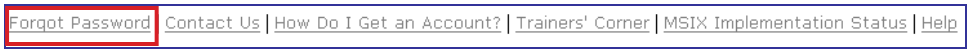
You can begin to learn about MSIX even before you receive your MSIX User Name and temporary Password. In fact, it is ***strongly recommended*** that you review the resources that are available on the website.

Sign In Page Links

The "Sign In" page contains some basic links to help you become familiar with MSIX. They include the following: Forgot Password, Contact Us, How Do I Get an Account?, Trainers' Corner, MSIX Implementation Status, and Help.

Forgot Password

Forgot Password navigates you to a page that contains the contact information for a User Administrator who can reset your password if you forget it or are locked out.



Contact Us

Contact Us navigates you to the "Contact Us" page, which contains contact information for the MSIX Help Desk. You can reach MSIX support via email (msixsupport@deloitte.com) or phone (1.866.878.9525). ***Note***, the Help Desk does not reset passwords, create new users, deactivate, or disable existing users.

How Do I Get an Account?

How Do I Get an Account provides access to the MSIX User Access Guide and Application.

Trainers' Corner

MSIX has a robust training program that includes online help and web-based training. The training is accessible directly from the MSIX website under Trainers' Corner. Therefore, it is available prior to logging into MSIX by clicking on the "Online Training" link for the desired role. This link contains numerous documents to acquaint you with MSIX and online training modules for every MSIX user role as shown below:

1. **Online Training** — Six role-based MSIX training courses in Adobe Flash 9 format that each take on average of one to two hours to complete, depending upon your role and how quickly you move through the course
2. **MSIX User Manual** (MS [Microsoft] Word, Adobe PDF [Portable Document Format], 508 Compliant) — Detailed resource for using MSIX
3. **MSIX Reports Manual** (MS Word, Adobe PDF) — Detailed documentation on the features, functionality and accessibility of the reports in MSIX
4. **Quick Reference Guide** (MS Word, Adobe PDF) — One-page job aide to summarize the steps for the most commonly used MSIX tasks
5. **Frequently Asked Questions** (FAQ) (MS Word, 508 Compliant) — Most typically asked questions in a searchable tool
6. **MSIX Training Environment Guide** (MS Word, Adobe PDF) — Resource to enable state training facilitators plan, deliver, and evaluate their MSIX training
7. **Refresher Training Materials** (MS Word, MS PowerPoint, Adobe PDF) — Presentation deck on the key features of MSIX and how to use each of them
8. **Webinars** (MS PowerPoint) — Presentation decks from previously conducted webinars for users
9. **MSIX User Administrator Guide** (MS Word, Adobe PDF) — Role-specific manual to support User Administrator tasks on managing user accounts
10. **User Access Guide** (MS Word, Adobe PDF) — Manual to guide users in requesting and acquiring a user account
11. **User Access Form** (MS Word, Adobe PDF) — Sample form that states can use to register users, verify their identification, and confirm the correct level of the user's access
12. **MSIX Brochures** (MS PowerPoint & Adobe PDF in English and Spanish) — Concise information to describe MSIX presented in a question-style format
13. **User Conference Presentation** (MS PowerPoint & Adobe PDF) — A presentation that provides a basic overview of MSIX that was used at various conferences to introduce MSIX
14. **MSIX Help Desk** — A link to the Contact Us page, which provides the phone number and email address for the Help Desk
15. **MSIX Release Change Notes** (MS Word, Adobe PDF) — Descriptions of the enhancements made to MSIX since its initial roll-out in September 2007

MSIX Implementation Status
MSIX Implementation Status displays a summary of the pre-implementation, implementation and fully implemented completion dates for each state. You will see a United States map with a key to define the colors just below the map.

Help
Help provides access to a comprehensive, searchable online help and FAQs.

Logging In

You will be notified via two separate emails as soon as you have been added as a user to MSIX. Samples of the emails are shown below.

From: Msix.Application@eds-orlando.com
To: <NEW MSIX USER>
Subject: MSIX Account Confirmation

Hello <MSIX User>,

Your State's MSIX user administrator has just created an MSIX account for you with the following user name:

<User Name>

This account is active effective December 11, 2011.

MSIX will send you another email with your temporary password

On the date indicated above, you can user the following link to access MSIX: https://msix.ed.gov .

If you have forgotten your login or password, please contact your appropriate User Administrator.

If you have questions regarding the contents of this email, please refer to the online help, user guide, and other documentation available within MSIX. You may also contact the MSIX Support team at msixsupport@deloitte.com

Figure 2.2: User Name Sample Email

From: Msix.Application@eds-orlando.com To: <NEW MSIX USER>
Subject: MSIX Account Confirmation
Please use the following password when accessing MSIX for your next login: **<System-generated Password>** Please use the following link to access MSIX: https://msix.ed.gov. If you have forgotten your login or password, please contact your appropriate User Administrator. If you have questions regarding the contents of this email, please refer to the online help, user guide and other documentation available within MSIX. You may also contact the MSIX Support Team at msixsupport@deloitte.com. This email account is not monitored.

Figure 2.3: Password Sample Email

Once you have received these emails and your account is active, you are ready to log into MSIX for the first time. When you do so, you are prompted to review the MSIX training materials, the Rules of Behavior (ROB), and change your password. After your initial MSIX login, you will not be asked to accept the ROB again. However, you will be required to change your password every 60 to 90 days.

In the event that you are not a regular MSIX user and it has been 90 days since you last used MSIX, your account will be automatically disabled. You must contact a User Administrator to have the account reactivated. You can find your User Administrator's contact information by clicking on the "How Do I Get an Account" link on the MSIX Sign In Page.

Login Error Messages

You must carefully enter your User Name and Password. MSIX displays an error message after each unsuccessful login attempt. You will be given two invalid login attempts. After the ***third unsuccessful login***, your account locks and an error message is displayed.

Login Error Messages	
Scenario	**Error Message**
User Name Field is Blank	**Error:** You must enter a valid user name.
Password Field is Blank	**Error:** You must enter your logon password.
User Name or Password are Incorrect	**Error:** Authentication failed. Please try again.
Three Invalid Login Attempts Have Been Made	**Error:** Your account is locked. Please notify the system administrator.

If your account is locked, contact your User Administrator to request that your password is reset. To locate your User Administrator, go to the MSIX website (http://msix.ed.gov) and click the "Contact Us" link. On this page, you will find the "User Administrator Search" link.

Steps for First Time Login

1. Access the MSIX **URL** (http://msix.ed.gov) on the date your account is active, and enter your **User Name** and **Password.** Then, click the **Login** button.

2. On the "Change Password" page, enter your **Expired or Temporary Password.** Then, enter a new password first in the **New Password** field and then a second time in the **Confirm New Password** field. Your new password must conform to MSIX password standards. To complete this step, click the **OK** button.

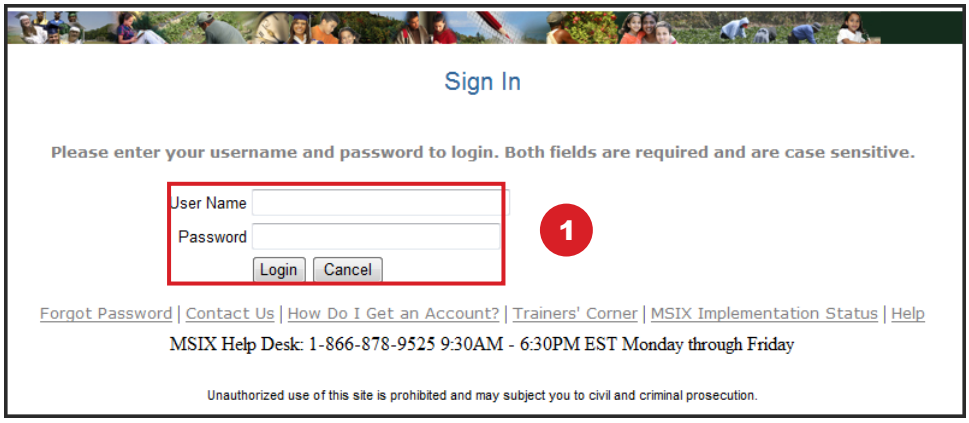
3. On the "Sign In" page, enter the newly created password in the **Password** field. Then, click the **Login** button.

4. Click the **Continue** button on the "Warning" page.

5. On the "Rules of Behavior" page, review the information. Then, click the **Accept** button.

Log into MSIX

The Sign In page is the entrance into MSIX.

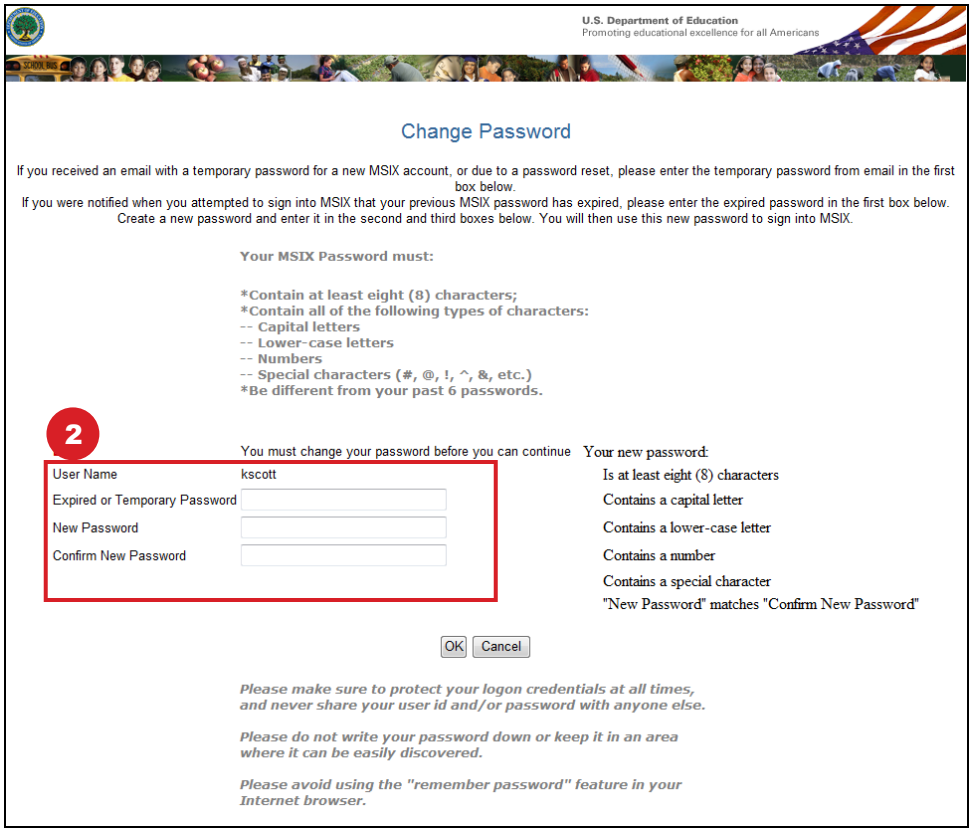


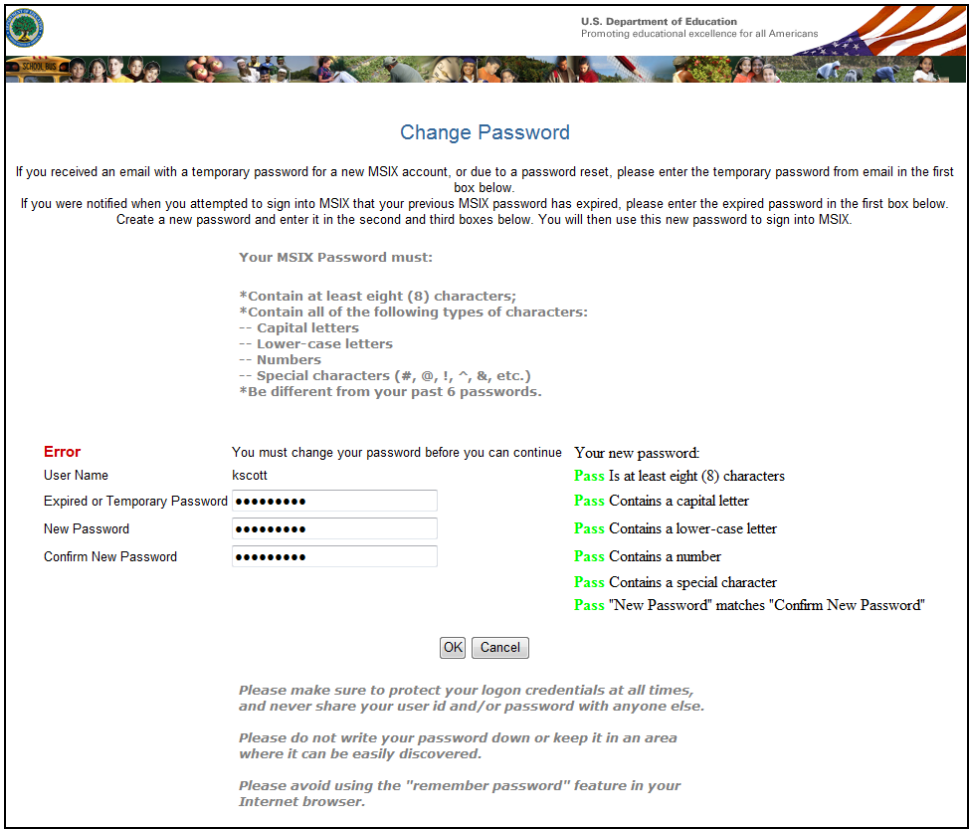
Change Your Password Using the MSIX Password Standards

The "Change Password" page allows you to change your password and only appears with your first time login. MSIX standards require that a password must have the following criteria:

- At least eight (8) characters
- At least one upper case letter (A-Z) and one lower case letter (a-z)
- At least one number (1-9)
- At least one special character (e.g., #, % or &)
- Cannot have spaces
- Cannot match any of your previous six (6) passwords

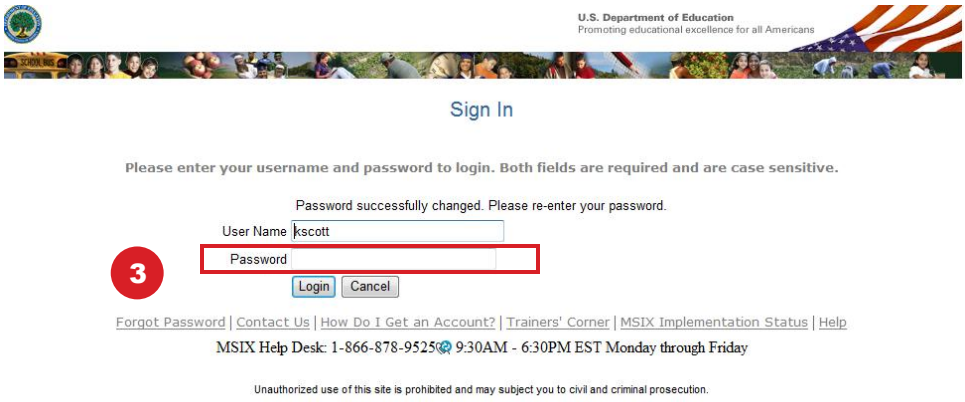
A checklist appears to the right of the password page that updates the criteria you meet as you enter in a new password.





Sign In Again with Your New Password

The "Sign In" page reappears with a message prompting you to enter your password. This is the new password that you *just created* on the "Change Password" page.

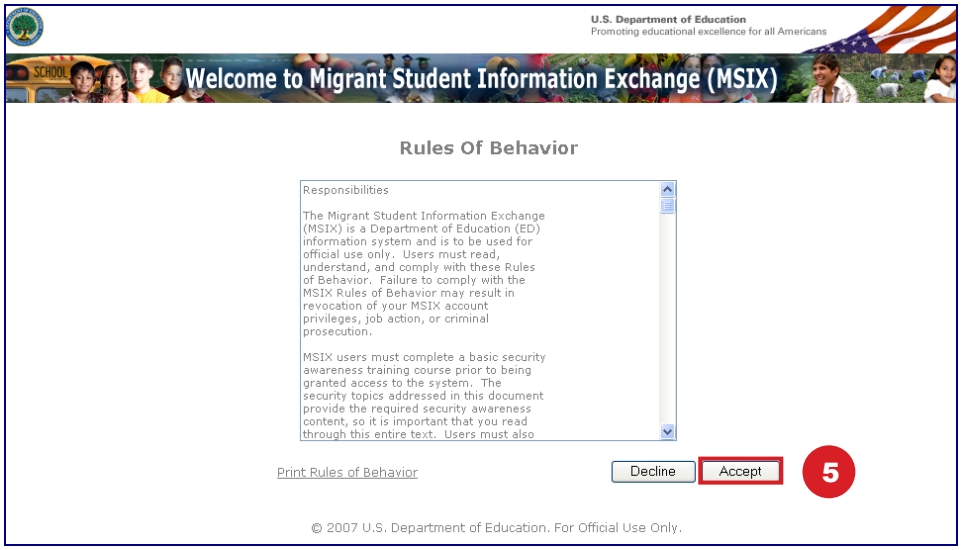


Review the Warning Page

The MSIX Warning page displays every time you successfully login. You must press the continue button to accept the warning before proceeding to the next page.

Review the Rules of Behavior (ROB)

This page displays upon initial user login. The ROB <u>must be accepted by each user</u> and a record of the user's acceptance stored in the database. You can view and print the ROB at any time by clicking on the link in the Footer Navigational elements at the bottom of any MSIX page.



Logging Out

Logout terminates your MSIX session. This helps to manage the system resources so connections are not open while not being used. It also provides an extra layer of security to help prevent others from using your MSIX user account.

Steps to Log Out of MSIX

1 Click the **Logout** link in the Top Navigation.

Log Back Into MSIX or Close Your Browser

The "Logout" page provides the ability to return to the "Sign In" page using the Return button. If you are finished using MSIX, just close your browser window.

Managing My Account

You have the ability to update your account information. Updating account information is limited to changing your telephone number and resetting your password. You can change your telephone number as often as it is needed. However, you can only change your password once per day. If other parts of your account need to be updated such as your name or email address, you must contact your User Administrator to make those changes.

Steps to Update Account Information

1. Click the **My Account** link in the Top Navigation.
2. Update Account Information such as **Telephone Number** or select the **Password Reset** option to submit a request to have your password reset.
3. Click the **Save** button.

Navigate to My Account

The My Account link is location in the Top Navigation.

Make Your Account Update and Save

This page allows you to change your Work Telephone Number or to submit a Password Reset request.

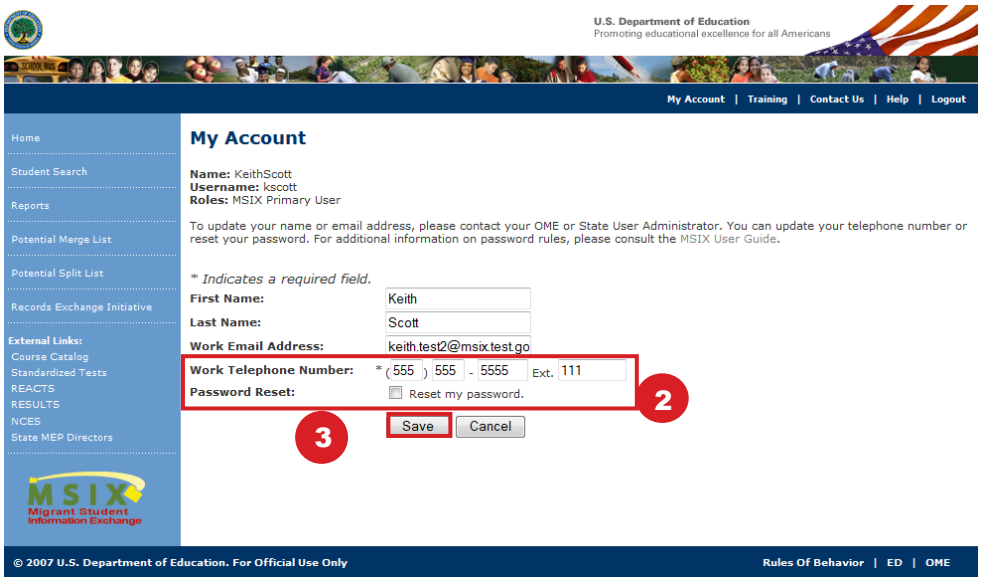
- **Work Telephone Number**: If you changed your Work Telephone Number, the change will be immediate and you can click the My Account link to see the change.

  It is important to keep your number updated in the event that another MSIX user or an Administrator may need to contact you at work, especially in cases where direct communication is necessary to resolve issues pertaining to one of your state's students.

- **Password Reset:** When submitting a request to reset your password, MSIX will automatically send an email with your MSIX randomly-generated, *temporary* password. This email will be similar to the sample shown in the "Logging In" section of this manual.

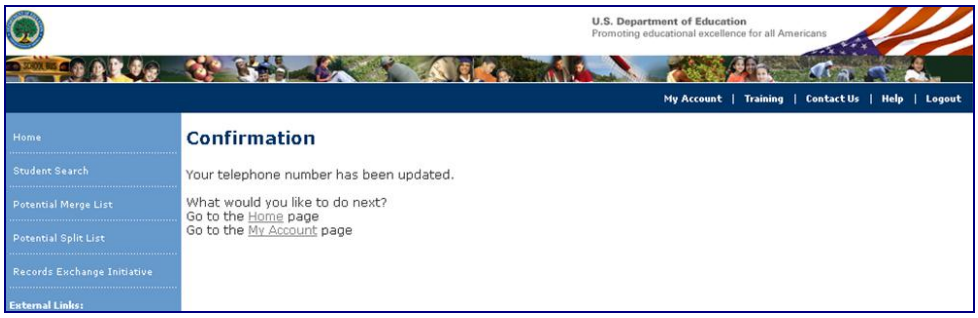
  With your *temporary* password, you can log into MSIX and then will be prompted to change the password using the MSIX password standards. In

addition, according to U.S. Department of Education (ED) security policy, you cannot use your **six previous passwords.**



Review Confirmation of Your Action

The "Confirmation" page displays a message that your request has been updated. The page also has navigational links to navigate to different pages of MSIX.



Section 3: Searching, Printing Records, and Notifying

There are certain functions that are helpful tools for teachers, guidance counselors, Migrant Education Program (MEP) data entry staff, recruiters, registrars, and Data and Regional Administrators as they attempt to gain a greater understanding and communicate about a particular student for placement purposes and other needs.

The Migrant Student Information Exchange (MSIX) provides the ability to search and display student records to assist in student placement. These student records can be printed when a paper copy is needed. MSIX also allows a means to send email notifications to another school about a student's pending arrival or departure. These MSIX functions are limited to MSIX Primary Users, Secondary Users, State Data Administrators, Regional Data Administrators, and District Data Administrators.

This section includes the following topics:

- Searching and Displaying
  - Using Search and Display to View a Consolidated Record
  - Using Search and Display to View an Historical Record
  - Understanding Privacy Act Compliance
  - Reviewing the Raw Student Record View
  - Using Advanced Search
- Printing Student Records
- Notifying of a Student's Arrival or Departure

Searching and Displaying

MSIX Primary Users, Secondary Users, State Data Administrators, Regional Data Administrators, and District Data Administrators can look for a single student record by the Student's Name, MSIX ID, or the combination of State and State ID. The Student's Record can be viewed at a high level with the **most recent** enrollments in the "Consolidated Student Record View." Or, student records can be viewed **with all** of the student's information in the "Historical Student Record View."

- **Consolidated Student Record View** (displays the **most recent** student information) – This view can be used to verify the identity of the student for whom you are searching. It provides the ability to flag a record for the merge and split processes. This view also provides the ability to send an email notification upon a student's arrival or departure.
- **Historical Student Record View** (**displays all** schools and all MEP program information) – This view can be used to determine proper course placement or confirm student identity. Under the Enrollments section, MSIX displays the Data Administrator associated with each student's records for each state. This helps users to identify the correct Data Administrators if contact is needed for questions or issues regarding a student's records.

Search for a Student Error Messages

MSIX displays one of the following error messages when you have entered invalid or no search information:

Search for a Student Error Messages	
Scenario	**Error Message**
MSIX ID Contains Letters vs. Numbers	**Error:** Please enter a numeric value for the MSIX ID.
Data was not Entered in one of the Required Fields	**Error:** Please enter at least one of the primary search criteria to perform the search. The primary search criteria include the following: MSIX ID, State Student ID, First Name, Middle Name and Last Name.
Information is not Contained in MSIX	**Error:** No results were found. Please click the refine search link to narrow the search criteria.

Table 3.1: Search for a Student Error Messages

Using Search and Display to View a Consolidated Record

Steps to Search

1. Click the **Student Search** link in the Left-side Navigation, which will take you to the "Basic Student Search" page.

2. On the "Basic Student Search" page, enter the **search criteria** by using at least one of the following fields:

   1. Student **MSIX ID**
   2. **Student State ID**
   3. Student **First**, **Middle**, or **Last Name**

Additional optional information such as Date of Birth ("Student DOB" field) and Gender ("Sex" field) can also be entered to further refine a search. All of the information entered is used to filter your results. If you are unsure of some of the information, it is better to enter less data rather than more.

3. MSIX will default to a "Partial" search unless you indicate otherwise. Select either **Partial** or **Exact** for each search criteria. If you only know some of the student information, use a Partial search. For Partial searches, a wildcard is assumed at the end of the search data entered (e.g., entering "mi" for Last Name finds "Miller" but not "Smith").

   This wildcard feature also allows you to search for students based on the date of birth (DOB) when you only have partial date information. If you enter partial DOB information, a list of all recorded students that were born on that particular month, date, and/or year will be displayed.

   MSIX receives all of its student data directly from states. If your state system stores hyphenated names, then MSIX will display the data with hyphens. The best way to search for hyphenated names is to use the "Partial" search and use the part of the name before the hyphen.

   Use "Exact" to search for an exact match to the information that you entered. If no data returns, change to a "Partial" search just in case there is a minor difference in the data.

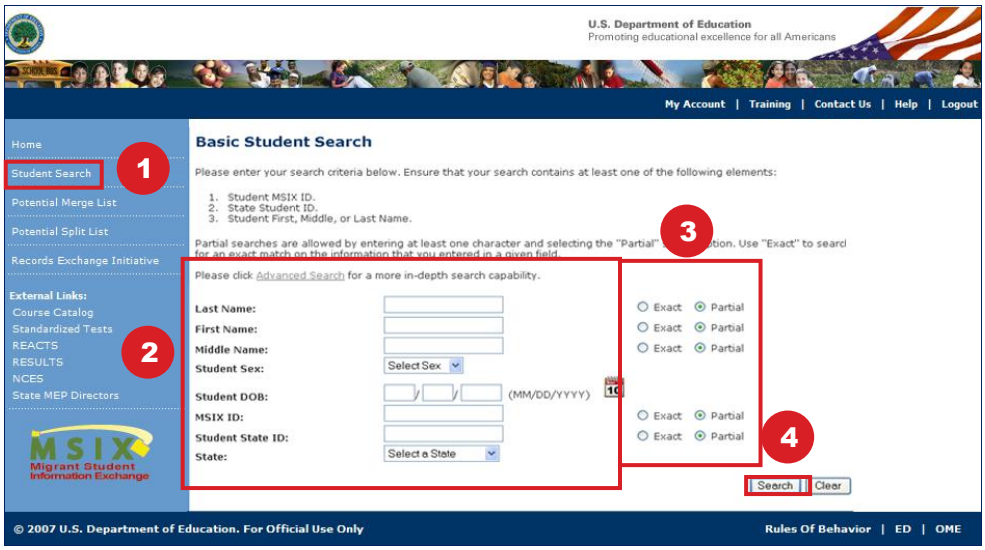
4. Click the **Search** button and the "Search Results for Student" page will display. Search results can be sorted by column names by clicking the column name.

5. Select an individual student record from the list by clicking on the student's **MSIX ID** link.

6. A column is provided on the right-hand side of the page where students can be **flagged** as potential matches. Multiple students can be flagged for merge in this column.

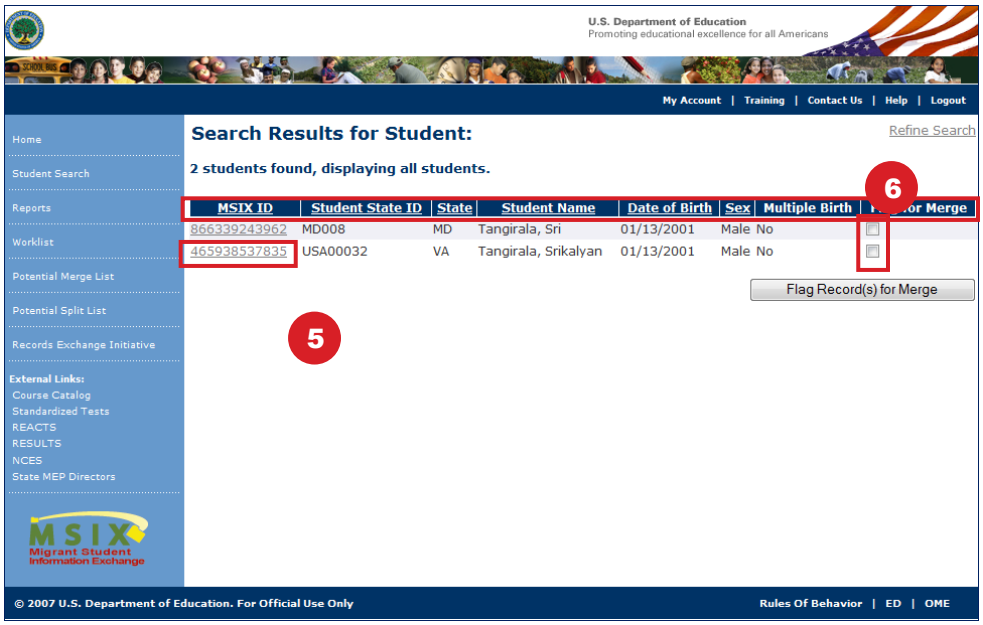
Access the Student Search and Find a Student

This page allows you to search for a student in MSIX.



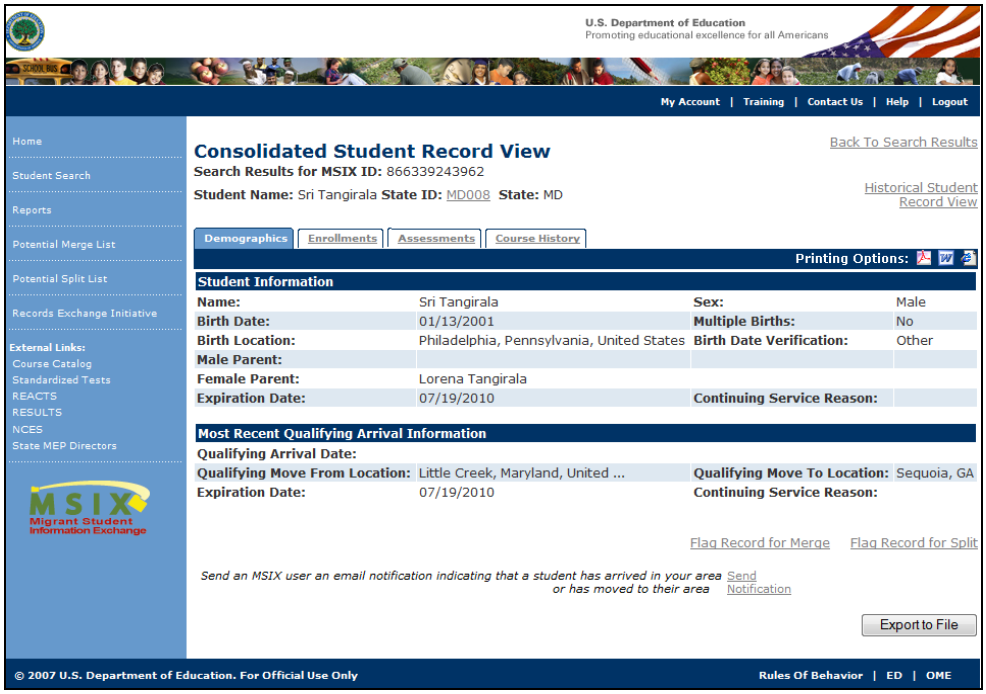
Select and Flag the Student Record

This page displays the results returned from your search. You can sort the search results by clicking on the column names. In this sample, the data is sorted by the "State Student ID" column.



View the Most Recent Information for the Student

When you select an individual student from the list of search results, you see the student's most recent demographic information on the "Consolidated Student Record View" page.



Understanding Privacy Act Compliance

To comply with the Privacy Act of 1974, MSIX records a student or guardian's dispute of the data contained for the student. To modify an MSIX record, parents and students must first work directly with the state where the student is currently enrolled by contacting their local Migrant Education Program (MEP) personnel to view the MSIX record. If parents and/or students are unsure of whom to contact locally, they should contact the State MEP Director. A list is provided at http://www.ed.gov/programs/mep/contacts.html.

- If it is agreed that the information is in error, it must be corrected in the state system before being corrected in MSIX through the regularly scheduled file transfer process.
- If it is *not* agreed that the information is in error and the parents and/or students are not satisfied, they can contact the MSIX Help Desk, at 1-866-878-9525 or MSIXsupport@deloitte.com. Then, OME would enter a comment to the effect and the dispute would be recorded in MSIX on the Consolidated Student Record View under the Privacy Act tab. The student record would be unchanged in MSIX and mirror that of the state.

The flowchart below displays the events in the appeals process.

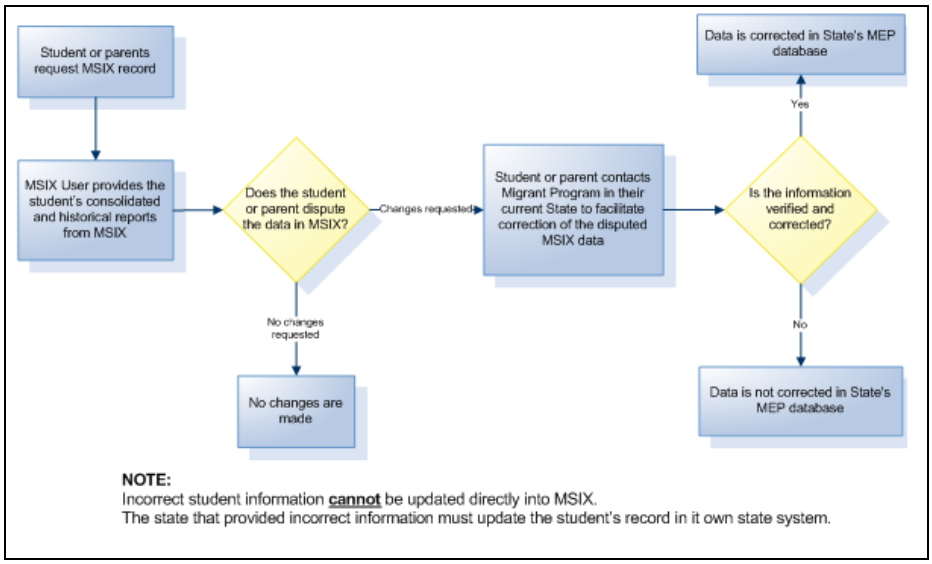


Figure 3.1: Student Record Dispute Appeals Process

Using Search and Display to View an Historical Record

Steps to Search

1. Click the Student Search link in the Left-side Navigation, which will take you to the "Basic Student Search" page.

2. On the "Basic Student Search" page, enter the search criteria by using at least one of the following fields:

   1. Student **MSIX ID**
   2. **State Student ID**
   3. Student **First, Middle, or Last Name**

   Additional optional information such as Date of Birth ("Student DOB" field) and Gender ("Sex" field) can also be entered to further refine a search. All of the information entered is used to filter your results. If you are unsure of some of the information, it is better to enter less data rather than more.

3. MSIX will default to a "Partial" search unless you indicate otherwise. Select either **Partial** or **Exact** for each search criteria. If you only know some of the student information, use a "Partial" search. For Partial

searches, a wildcard is assumed at the end of the search data entered (e.g., entering "mi" for Last Name finds "Miller" but not "Smith").

This wildcard feature also allows you to search for students based on the date of birth (DOB) when you only have partial date information. If you enter partial DOB information, a list of all recorded students that were born on that particular month, date, and/or year will be displayed.

MSIX receives all of its student data directly from states. If your state system stores hyphenated names, then MSIX will display the data with hyphens. The best way to search for hyphenated names is to use the "Partial" search and use the part of the name before the hyphen.

Use "Exact" to search for an exact match to the information that you entered.

4. Click the **Search** button and the "Search Results for Student" page will display. Search results can be sorted by column names by clicking the column name.

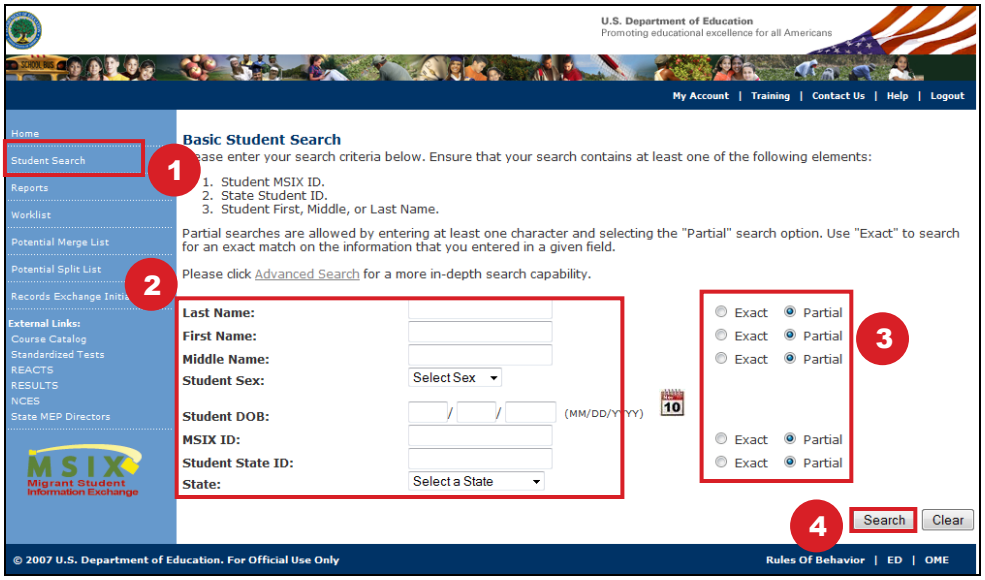
5. Select an individual student record from the list by clicking on the student's **MSIX ID** link.

6. A column is provided on the right hand side of the page where students can be **flagged** as potential matches. Multiple students can be flagged for merge in this column.

7. Select the **Historical Student Record View** link on the top of the "Consolidated Student Record View" page. MSIX displays the Data Administrator associated with each student's records for each state. This information can now be found on the "Historical Student Record View" page under the Enrollments section and will help you identify the correct Data Administrator to contact for questions or issues regarding a student's records.

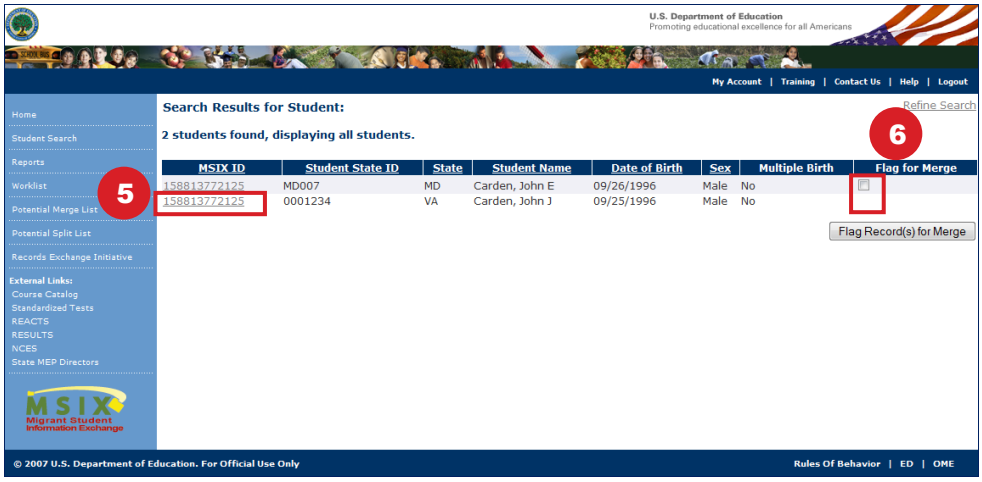
Access the Student Search and Find a Student

This page allows you to search for a student in MSIX.



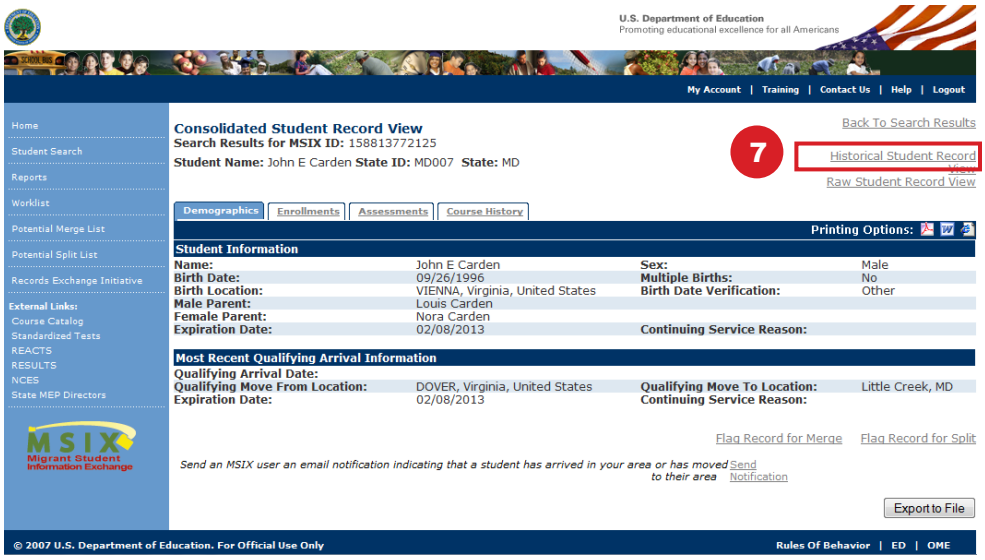
Select and Flag the Student Record

This page displays the results returned from your search.



View the Most Recent Information for the Student

This page displays the most recent information about this student.



View All MSIX Data for this Student Record

The Historical Student Record View displays all student information from all schools and all Migrant Education Program (MEP) programs. Each student record can be expanded to display Demographic, Qualifying Moves, and Enrollments information.

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Home
Student Search
Reports
Worklist
Potential Merge List
Potential Split List
Records Exchange Initiative

External Links:
Course Catalog
Standardized Tests
REACTS
RESULTS
NCES
State MEP Directors

MSIX Migrant Student Information Exchange

Historical Student Record View

Back To Search Results

Student Name: John J Carden
Search Results for MSIX ID: 158813772125

7

Consolidated Student View
Raw Student Record View

Printing Options:

[-] 0001234 (Virginia)

(Updated 2012-02-16) View ID History

[-] Demographics

Student Name:	John J Carden	**Sex:**	Male
Birth Date:	09/25/1996	**Multiple Births:**	No
Birth Location:	VIENNA, Virginia, United States	**Birth Date Verification:**	Other
Male Parent:	Louis Carden		
Female Parent:	Nora Carden		
Eligibility Expiration Date:	02/08/2013	**Continuing Service Reason:**	

[-] Qualifying Moves

Qualifying Arrival Date	Qualifying Move From Location	Qualifying Move To Location
03/08/2008	Big Creek, Maryland, United St ...	DOVER, VA
02/08/2006	Little Creek, Maryland, United ...	DOVER, VA
07/19/2004	Vienna, Virginia, United State ...	LITTLE CREEK, MD

[-] Enrollments

School Name	Enrollment Date	Grade	Withdrawal Date	Immunization
[+] Little Creek High School	04/09/2008	Grade 10		No
[+] METOMPKIN ELEM	02/09/2006	Grade 9	06/01/2006	No
[+] PUNGOTEAGUE ELEM	05/29/2004	Grade 7	07/19/2004	Yes

[-] MD007 (Maryland)

(Updated 2012-02-16) View ID History

[-] Demographics

Student Name:	John Carden	**Sex:**	Male
Birth Date:	09/25/1996	**Multiple Births:**	No
Birth Location:	VIENNA, Virginia, United States	**Birth Date Verification:**	Other
Male Parent:	Louis Carden		
Female Parent:	Nora Carden		
Eligibility Expiration Date:	02/08/2013	**Continuing Service Reason:**	

[+] Qualifying Moves

[-] Enrollments

School Name	Enrollment Date	Grade	Withdrawal Date	Immunization
[-] Middle Hills High School	04/09/2007	Grade 9	09/03/2007	No

State:	MD	**Enrollment Date:**	04/09/2007
Withdrawal Date:	09/03/2007	**Immunization:**	No
Grade Level:	Grade 9		
Enrollment Type:	Year Round MEP-Funded Project	**School/Project Name:**	Middle Hills High School
MEP Project Type:	Non-School-based MEP Project	**School ID/Facility Name:**	Vista School
Enrollment District:	Middle Hills	**Facility Phone Number:**	915-855-6677
Facility Address:	7300 Biship Flores	**Enrollment Location:**	Middle Hills, MD, 20009
PFS Indicator:	No	**Home Schooled:**	No
LEP Indicator:	No	**IEP Indicator:**	No
MED Alert:		**Designated Graduation School:**	
District of Residence:		**Residency Date:**	03/21/2007

Enrollment Comments: This is a test comment

Data Administrator Information

[-] Course

State	Subject Area	Course Title	Academic Year Start	Academic Year End	Grade	Credits
[+] MD	Science	Chemistry	2006	2007	A	5
[-] MD	History	US Government	2007	2008	60 (t)	2.5

Begin Academic Year:	2007	**End Academic Year:**	2008
Course Title:	US Government	**Subject Area:**	History
Course Section:	Full Year		
Course Type:	Honors - An Advanced Level Course Designed For Students Who Have Earned Honors Status According To Educational Requirements.	**Term Type:**	Quarter
Final Grade:		**Grade-to-Date:**	60
Credits Granted:	2.5	**Clock Hours:**	12

[-] Assessments

State	Date	Title	Type	Score
[-] MD		TAS Test	State Assessment	900

Administration Date:			
Title:	TAS Test	**Content:**	English
Type:	State Assessment	**Reporting Method:**	Percentile Rank
Score Results:	900	**Interpretation:**	Passed

[+] METOMPKIN ELEM	06/09/2006	Grade 9	09/01/2006	No
[+] Greenwood Elementary School	01/19/2005	Grade 8	05/19/2005	No

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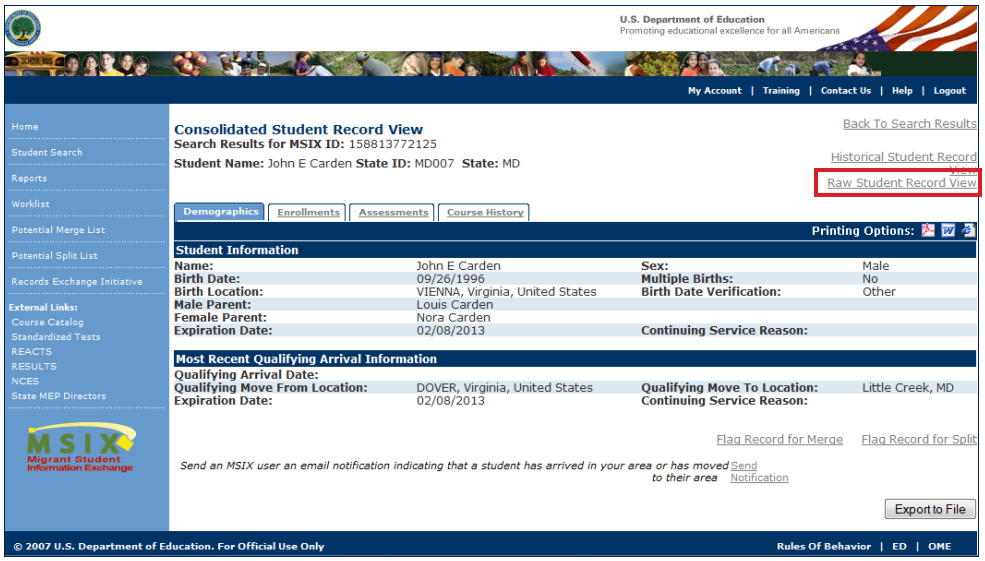
Reviewing the Raw Student Record View

For Data Administrators, an additional link, the "Raw Student Record View," is displayed on the "Consolidated Student Record View" page. This link directs the Data Administrators to a page that contains the unprocessed student data that is directly received from state files. In some situations, the data received from states fails to meet the MSIX standards and is not displayed or is replaced by MSIX reference data. By clicking on the "Raw Student Record View" link and checking the raw data, you may view the student's data as it was originally submitted by the state to validate and verify the integrity of student information in MSIX.

Note the "Raw Student Record View" Link is Available

Data Administrators will see this link if they need to see the original data from the state.



View the Raw Data in the Various Sections

Each section of the student record can be expanded to display raw data in the Demographic, Qualifying Moves, and Enrollments information.

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Home
Student Search
Reports
Worklist
Potential Merge List
Potential Split List
Records Exchange Initiative

External Links:
Course Catalog
Standardized Tests
REACTS
RESULTS
NCES
State MEP Directors

MSIX Migrant Student Information Exchange

Raw Student Record View

Back To Search Results

Student Name: John J Carden
Search Results for MSIX ID: 158813772125

Consolidated Student View
Historical Student Record View

Printing Options:

[-] 0001234 (Virginia)

[-] Demographics

Student Name:	John J Carden	**Sex:**	Male
Birth Date:	19960925	**Multiple Births:**	No
Birth Location:	VIENNA, VA, 2330	**Birth Date Verification:**	9999
Male Parent:	Louis Carden		
Female Parent:	Nora Carden		
Eligibility Expiration Date:	20130208	**Continuing Service Reason:**	

[-] Qualifying Moves

Qualifying Arrival Date	Qualifying Move From Location	Qualifying Move To Location
20080308	Big Creek, MD, 2330	DOVER, VA
20060208	Little Creek, MD, 2330	DOVER, VA
20040719	Vienna, VA, 2330	LITTLE CREEK, MD

[-] Enrollments

School Name	Enrollment Date	Grade	Withdrawal Date	Immunization
[+] Little Creek High School	20080409	10		No
[+] Metompkin MEP School	20060209	09	20060601	No
[+] Vienna MEP School	20040529	07	20040719	Yes

[-] MD007 (Maryland)

[+] Demographics

[+] Qualifying Moves

[-] Enrollments

School Name	Enrollment Date	Grade	Withdrawal Date	Immunization
[-] Middle Hills High School	20070409	09	20070903	No

State:	MD	**Enrollment Date:**	20070409
Withdrawal Date:	20070903	**Immunization:**	No
Grade Level:	09		
Enrollment Type:	04	**School/Project Name:**	Middle Hills High School
MEP Project Type:	02	**School ID/Facility Name:**	/ Vista School
School District ID/Name:	/ Middle Hills	**Facility Phone Number:**	9158556677
Facility Address:	7300 Biship Flores	**Enrollment Location:**	Middle Hills, MD, 20009
PFS Indicator:	No	**Home Schooled:**	No
LEP Indicator:	No	**IEP Indicator:**	No
MED Alert:	No	**Designated Graduation School:**	
District of Residence:		**Residency Date:**	20070321

Enrollment Comments: This is a test comment

[+] Data Administrator(s)

[+] Course

[-] Assessments

State	Date	Title	Type	Score
[-] MD	20070815	TAS Test	01	900

Administration Date:	20070815		
Title:	TAS Test	**Content:**	English
Type:	01	**Reporting Method:**	0502
Score Results:	900	**Interpretation:**	Passed

[+] Grandy Summer School	20060609	09	20060901	No
[+] Big Creek MEP School	20050119	08	20050519	No

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Reviewing the State Student ID History

For Primary Users and Data Administrators, an additional link, the "View ID History," is displayed on the "Historical Student Record View" page. This link directs the users to a page that contains the State Student ID (SSID) History. The SSID History functionality collects and displays a summarized history of each State Student ID within MSIX. The history will show all other State Student IDs currently or previously associated with the subject State Student ID. While in the MSIX system, a State Student Record may undergo merges, splits, updates, or deletes which may link a given SSID with another SSID or change the student's MSIX ID. With this new functionality, a new history record is created on the SSID History page for each State Student ID following each merge, split, update, or delete involving the subject SSID.

For example, a Consolidated Student Record is comprised of three merged State Student Records. Suppose that the student is enrolled in a fourth state. The fourth state loads a State Student Record into MSIX and it is merged with the Consolidated Student Record containing the original three states. All four State Student IDs will log a change on their history pages that can be viewed by authorized users.

The State Student ID History is accessible by all State, Regional, and District Data Administrators as well as Primary Users from a new link to the right of each State Student ID on the Student Historical Record View page. Any merges, splits, updates, or deletes that occurred prior to March 5, 2012 will not be visible in the SSID History.

Steps to View

1. From the "Historical Student Record View" page, click the "View ID History" link.

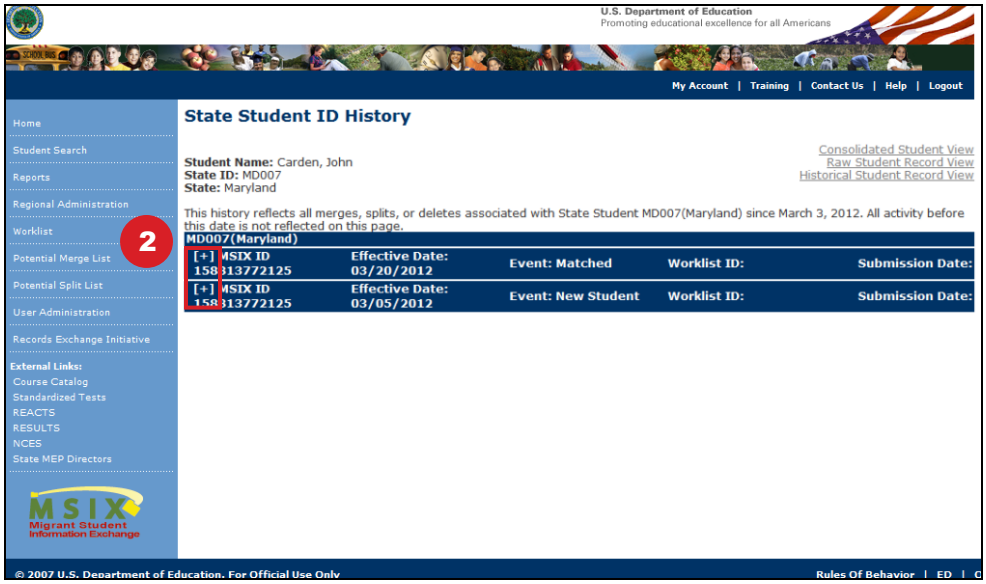
2. On the "State Student ID History" page, expand the rows to view the State Student IDs associated with the MSIX ID resulting from the event indicated.

Note the "View ID History" Link is Available

Data Administrators and Primary Users will see this link for all student records in the "Historical Student Record View."

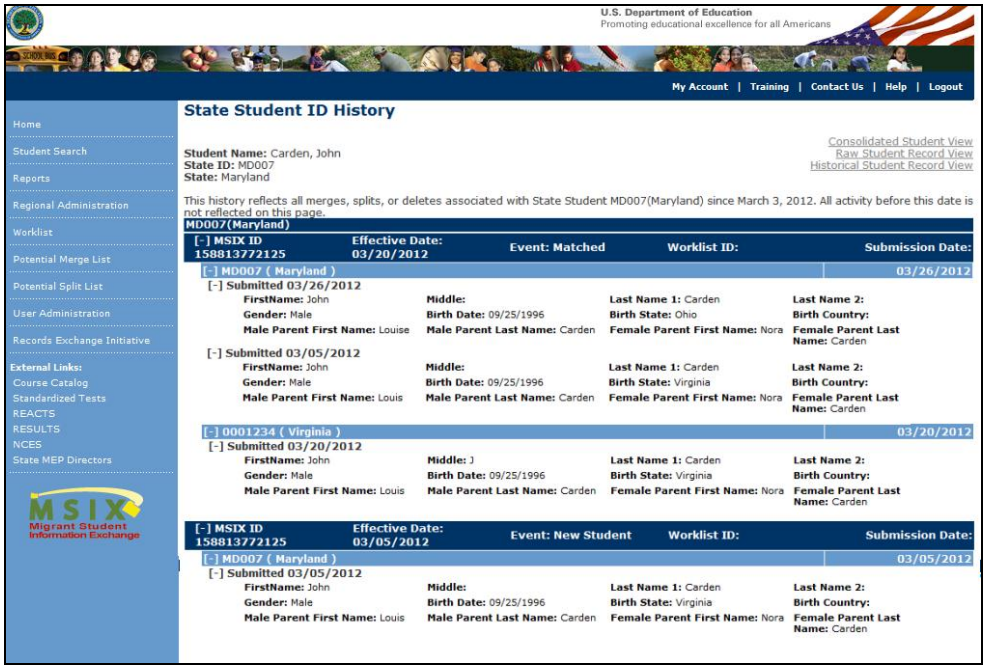
Expand the MSIX ID rows associated with each event

Each MSIX ID associated with the state student record can be expanded to display State Student IDs associated with the selected MSIX ID as a result of the event listed in the third column. In turn, each SSID assigned to the MSIX ID at that time can be expanded to view the submission dates of that State Student record.



View the Details of the State Student ID History

All rows are expanded. The State Student ID History will also display the core demographic data that was included in each update provided for the student. This information will provide insight into any changes that occurred to the student's information over time that will impact how MSIX will assess and automatically match the student with other new student records



Using Advanced Search

The MSIX Primary Users, Secondary Users, State Data Administrators, Regional Data Administrators and District Data Administrators can look for a single student record using additional data elements on the "Advanced Student Search" page.

Steps to Conduct an Advanced Search

1. Click the **Student Search** link in the Left-side Navigation, which will take you to the "Advanced Search" page.

2. Click on the **Advanced Search** link at the top of the "Basic Student Search" page.

3. On the "Advanced Student Search" page, enter the search criteria by using at least one of the following fields:

   1. Student **MSIX ID**
   2. **State Student ID**
   3. Student **First, Middle, or Last Name**

   Additional optional information such as Birth Country, Birth State, Parent's names, and the Multiple Birth Flag can be entered on the "Advanced Student Search" page to further refine the Student Search Results. All of the information entered is used to filter your results. If you are unsure of some of the information, it is better to enter less data rather than more.

4. MSIX will default to a "Partial" search unless you indicate otherwise. Select either **Partial** or **Exact** for each search criteria. If you only know some of the student information, use a "Partial" search. For Partial searches, a wildcard is assumed at the end of the search data entered (e.g., entering "mi" for Last Name finds "Miller" but not "Smith").

   This wildcard feature also allows you to search for students based on the date of birth (DOB) when you only have partial date information. If you enter partial DOB information, a list of all recorded students that were born on that particular month, date, and/or year will be displayed.

   MSIX receives all of its student data directly from states. If your state system stores hyphenated names, then MSIX will display the data with hyphens. The best way to search for hyphenated names is to use the "Partial" search and use the part of the name before the hyphen.

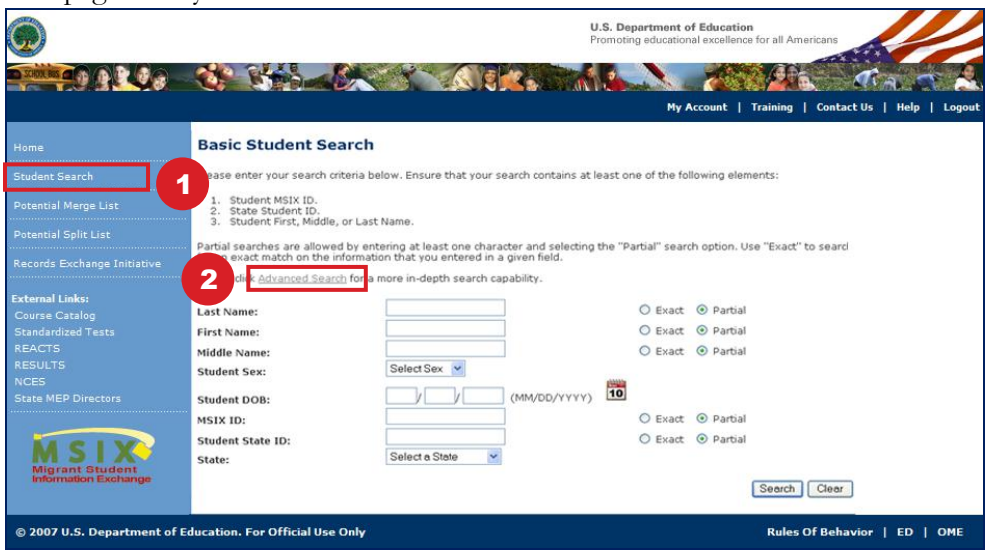
Use "Exact" to search for an exact match to the information that you entered.

5 Click the **Search** button and the "Search Results for Student" page will display. Search results can be sorted by column names by clicking the column name.

6 Select an individual student record from the list by clicking on the student's **MSIX ID** link.

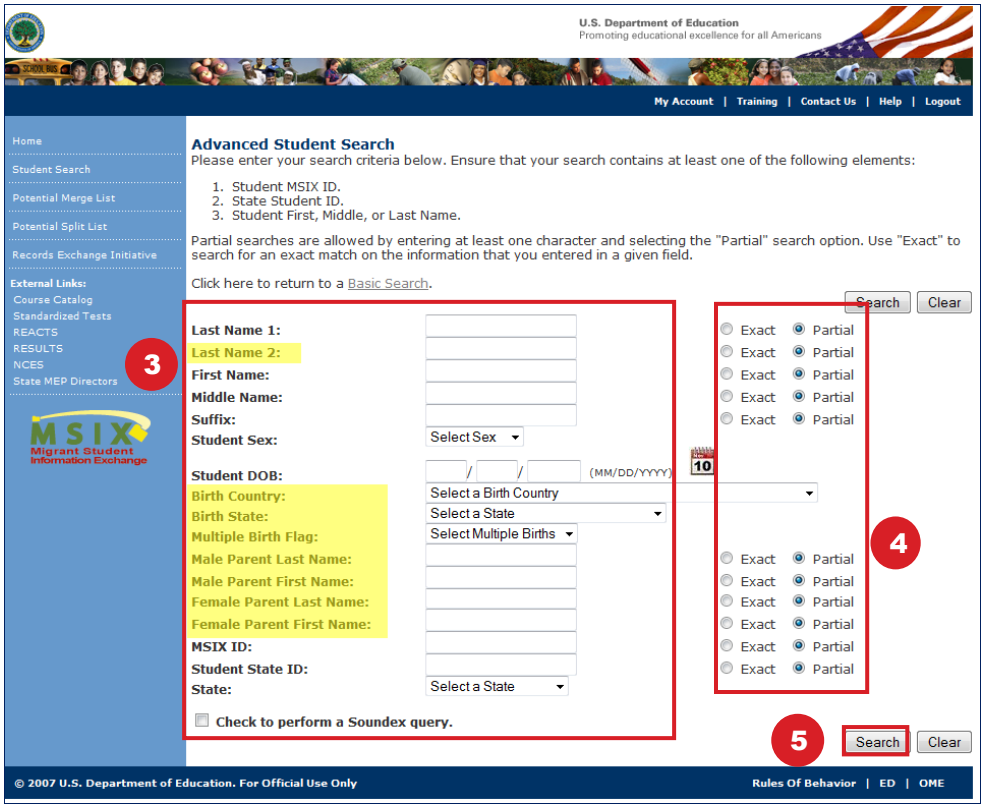
Access the Student Search to Find a Student

This page takes you to the link to do an advanced search.



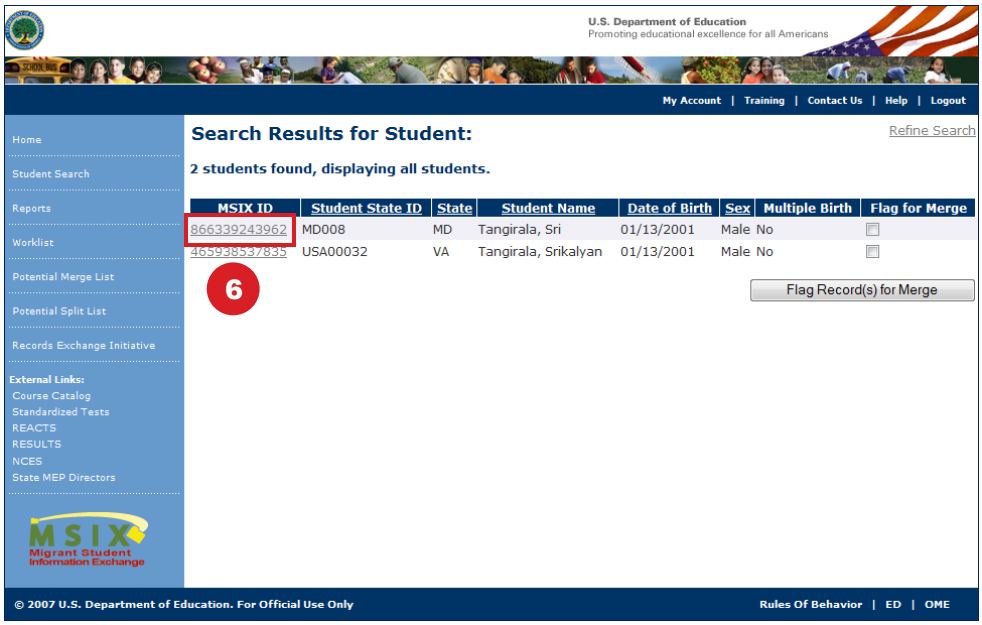
Use Additional Fields to Search for a Student Record

Advanced Search allows users to search for students on additional search criteria. Notice that there are nine more fields on the "Advanced Student Search" page than in the "Basic Student Search" page. Those additional fields are highlighted below in yellow for this illustration, but are not highlighted in the MSIX application.



Locate the Student

This page displays the results set returned from your search. Select the MSIX ID of the student you wish to view more data on.



Printing Student Records

The MSIX Primary Users, MSIX Secondary Users, State Data Administrators, Regional Data Administrators, and District Data Administrators can print a student record using a selected print format.

Steps to Print

1. Click the Student Search link in the Left-side Navigation, which will take you to the "Basic Student Search" page.

2. On the "Basic Student Search" page, enter the search criteria by using at least one of the following fields:

   a. Student **MSIX ID**

   b. **State Student ID**

   c. Student **First, Middle, or Last Name**

   Additional optional information such as Date of Birth ("Student DOB" field) and Gender ("Sex" field) can also be entered to further refine a search. All of the information entered is used to filter your results. If you are unsure of some of the information, it is better to enter less data rather than more.

3. MSIX will default to a "Partial" search unless you indicate otherwise. Select either **Partial** or **Exact** for each search criteria. If you only know some of the student information, use a "Partial" search. For Partial searches, a wildcard is assumed at the end of the search data entered (e.g., entering "mi" for Last Name finds "Miller" but not "Smith").

   This wildcard feature also allows you to search for students based on the date of birth (DOB) when you only have partial date information. If you enter partial DOB information, a list of all recorded students that were born on that particular month, date, and/or year will be displayed.

   MSIX receives all of its student data directly from states. If your state system stores hyphenated names, then MSIX will display the data with hyphens. The best way to search for hyphenated names is to use the "Partial" search and use the part of the name before the hyphen.

   Use "Exact" to search for an exact match to the information that you entered.

4. Click the **Search** button and the "Search Results for Student" page will display. Search results can be sorted by column names by clicking the column name.

5. Select an individual student record from the list by clicking on the student's **MSIX ID** link.

6. Select the **HTML** (HyperText Markup Language), **PDF**, or **MS Word** printing icons on the "Consolidated Student Record View" page.

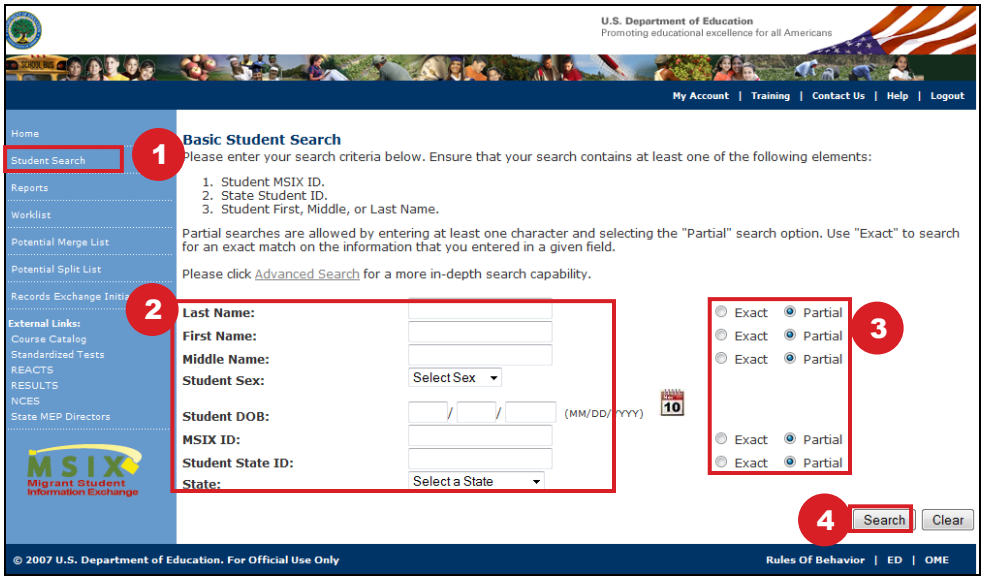
7. Select the **report section(s)** that you would like to print.

8. Select **Print** from the **File** menu of the new MS Word, Adobe, or Explorer window.

9. **Open** the document and **Print** as you would normally print a document.

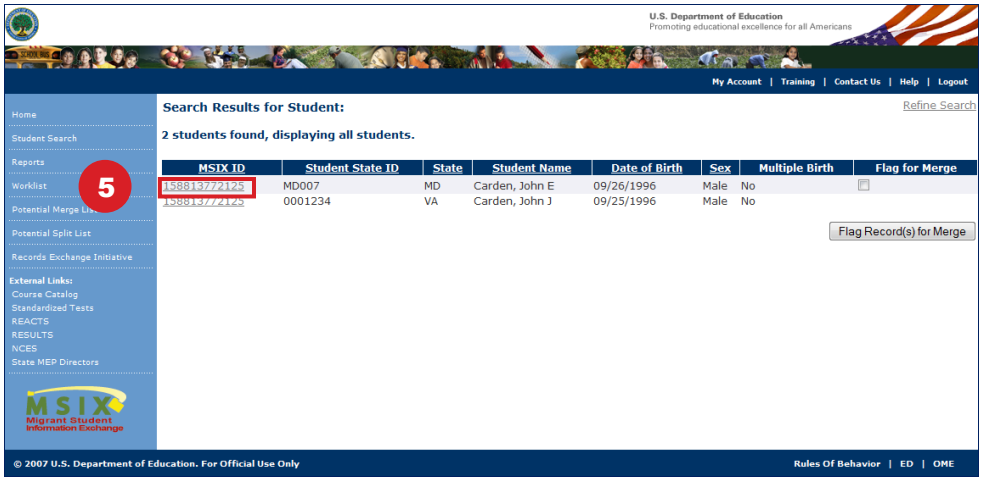
Access the Student Search and Find a Student

This page allows you to search for a student in MSIX.



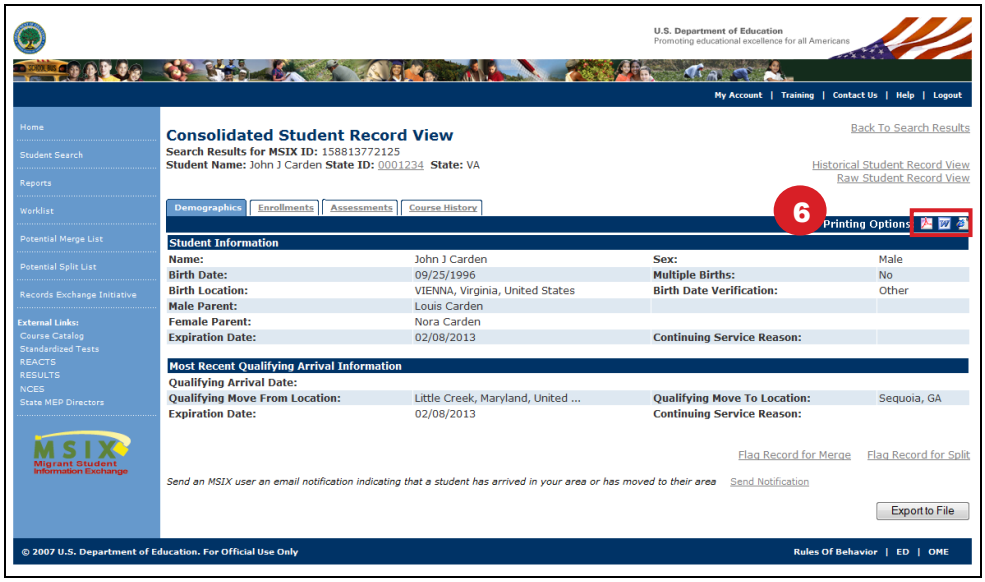
Select the Student Record

This page displays the results returned from your search.



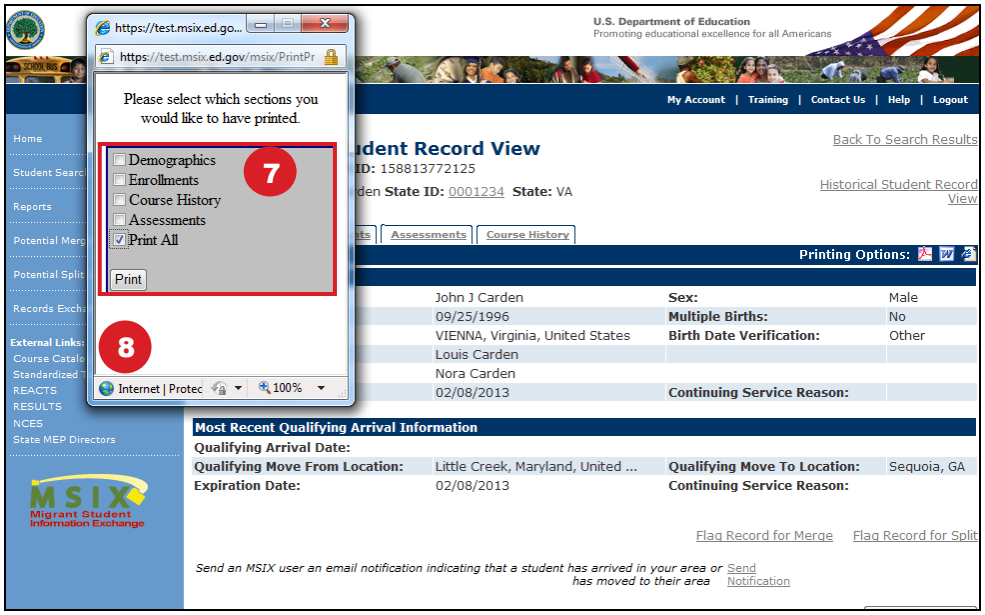
Determine the Preferred Printing Option

MSIX allows you to print the student file in one of the following formats: Adobe PDF, MS Word, or as an HTML page.



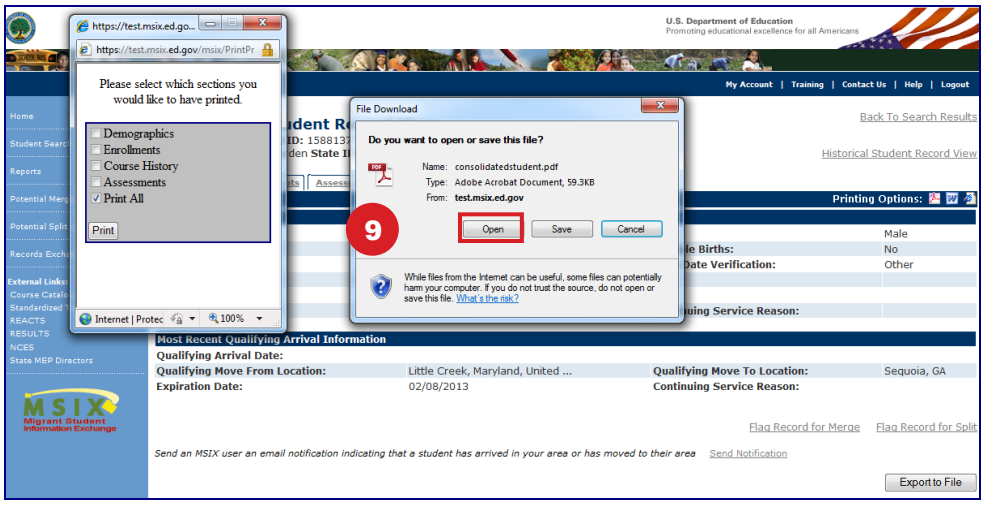
Select the Report Content

Users are provided with the ability to select the sections of the Consolidated Student Report they would like to print. When a user attempts to print a Consolidated Student Report by clicking on one of the different printing options (HTML, PDF, Word file), an option box appears that allows them to identify and print only the data they currently need, while suppressing other information they do not. You can filter what you print by selecting either individual sections (Demographics, Enrollments, Assessments, Course History) of the report or can print all of the report by selecting the "Print All" option.



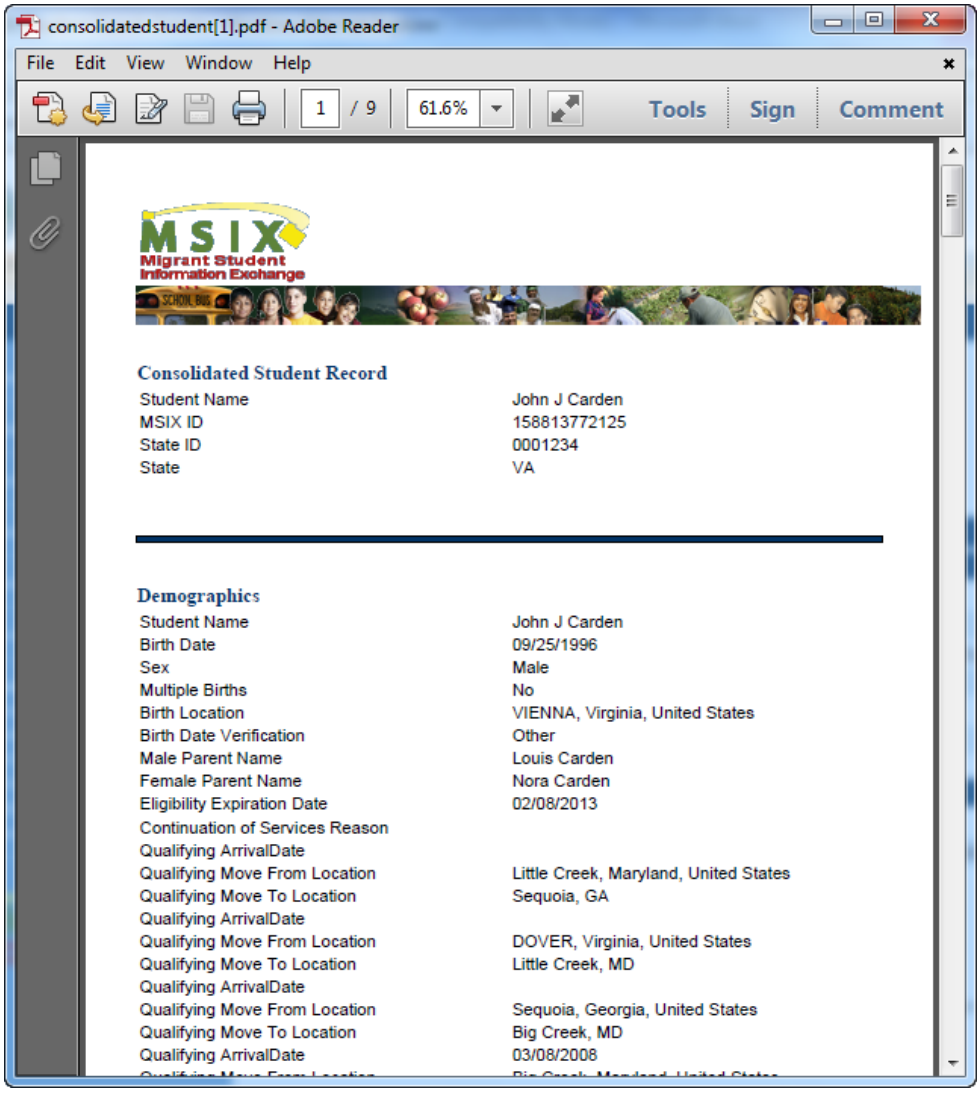
Proceed to Print a Consolidated Report

Users are provided with the ability to select the sections of the Consolidated Student Record View.



View the Record Results

Prior to printing, you can view the report results to determine if it is exactly what you intended.



Notifying of a Student's Arrival or Departure

MSIX provides an email notification feature to alert another area of a student's relocation in the case of their arrival or departure. As the sender, you will be copied on the email, so you can see the resulting notification. In addition, you can include comments regarding the student who is relocating. However, it is important to remember that information entered in the "Comments" field will be shared unedited and in their entirety with other MSIX users and you must be careful to protect the student's privacy.

Steps to Send an Email Notification

1. Click the Student Search link in the Left-side Navigation, which will take you to the "Basic Student Search" page.

2. On the "Basic Student Search" page, enter the search criteria by using at least one of the following fields:

   1. Student **MSIX ID**
   2. **State Student ID**
   3. Student **First, Middle, or Last Name**

   Additional optional information such as Date of Birth ("Student DOB" field) and Gender ("Sex" field) can also be entered to further refine a search. All of the information entered is used to filter your results. If you are unsure of some of the information, it is better to enter less data rather than more.

3. MSIX will default to a "Partial" search unless you indicate otherwise. Select either **Partial** or **Exact** for each search criteria. If you only know some of the student information, use a "Partial" search. For Partial searches, a wildcard is assumed at the end of the search data entered (e.g., entering "mi" for Last Name finds "Miller" but not "Smith").

   This wildcard feature also allows you to search for students based on the date of birth (DOB) when you only have partial date information. If you enter this partial DOB information when conducting a student search, a list of all recorded students that were born on that particular month, date, and/or year will be displayed.

   MSIX receives all of its student data directly from states. If your state system stores hyphenated names, then MSIX will display the data with hyphens. The best way to search for hyphenated names is to use the "Partial" search and use the part of the name before the hyphen. You can then locate the name you are looking for in the list of results.

Use "Exact" to search for an exact match to the information that you entered.

4. Click the **Search** button and the "Search Results for Student" page will display. Search results can be sorted by column names by clicking the column name.

5. Select an Individual Student Record link from the list on the search results page by clicking on the Student's **MSIX ID** link.

6. Click the **Send Notification** link.

7. On the "Email Notification" page, select the **State** to indicate where the message should be sent. Once you have the selected the state, the **District** and **School** fields that are associated with that state will display**.** You may enter one or both, but they are not required fields. Then, select a **Message** from the available drop-down list choices.

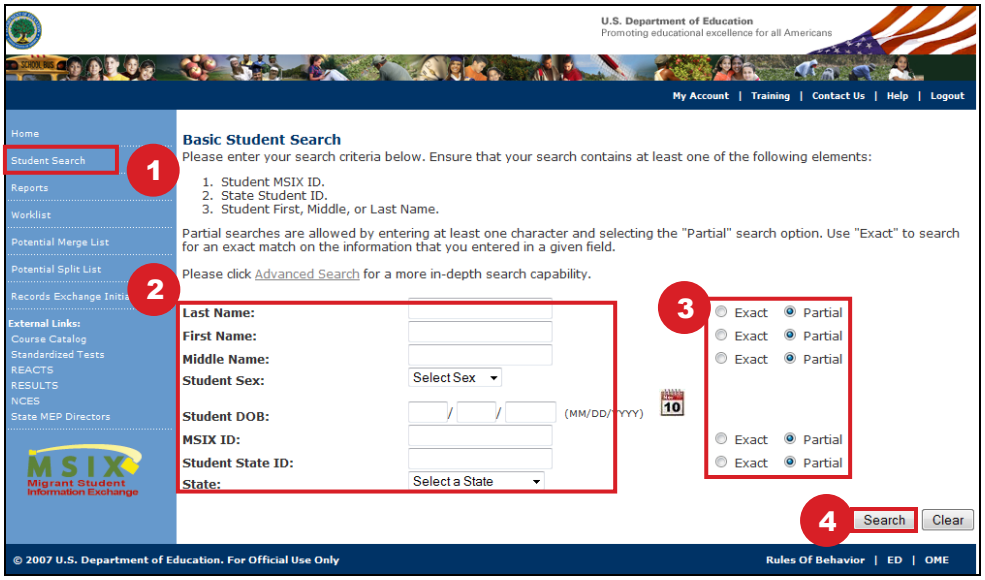
   Additional comments can be entered in the "Comments" field, such as the city or town that the student plans to move. However, to protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information. Your comments will be shared unedited and in their entirety with other MSIX users.

8. Click the **Next** button.

9. Verify the Notification information. Then, click the **Yes** button. When you send a student move notification, you will be copied on the email that is automatically sent. This will serve as a confirmation to the person that originated the notification, helping him/her to maintain his/her own records. It will also make it easier for the recipient to respond to the notification by providing your contact information.

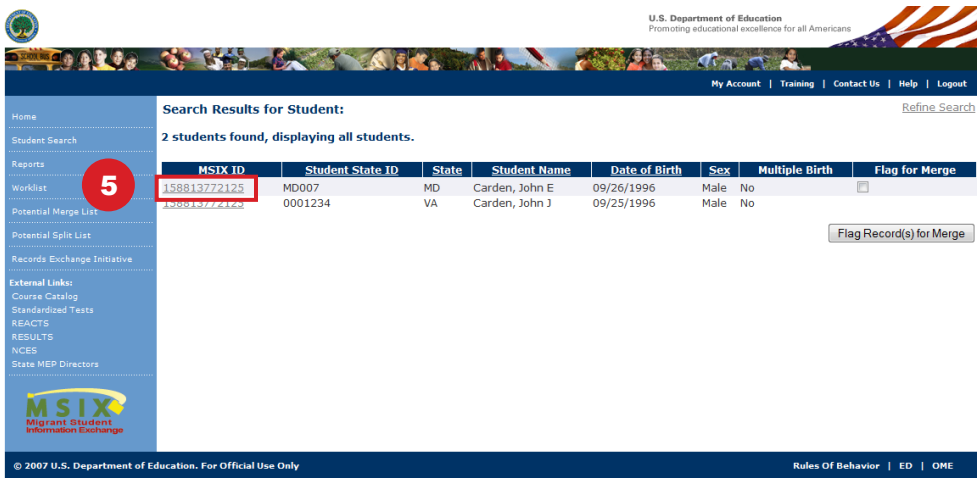
Access the Student Search and Find a Student

This page allows you to search for a student in MSIX.



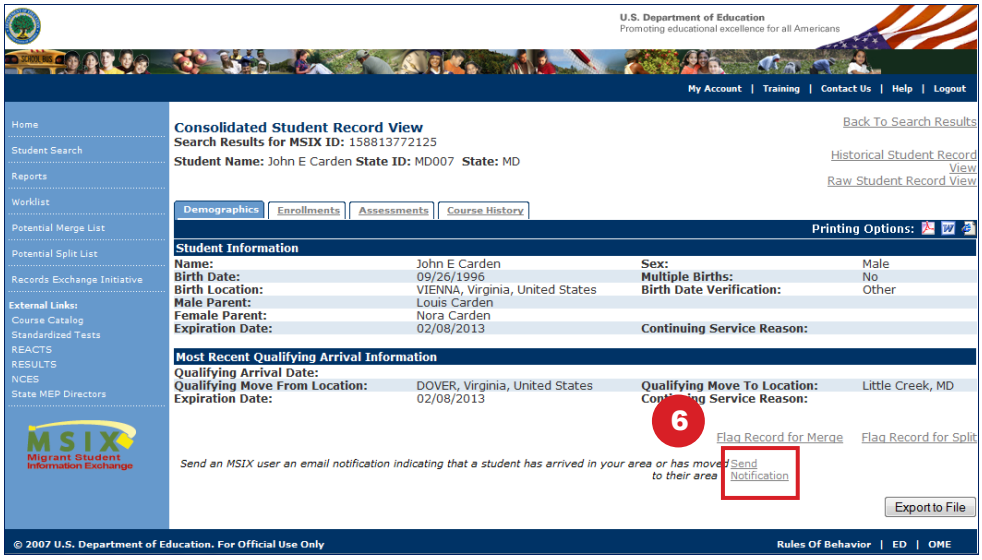
Select the MSIX ID of the Student.

This page displays the results returned from your search. Select the MSIX ID of the student you wish to send the move notification for.



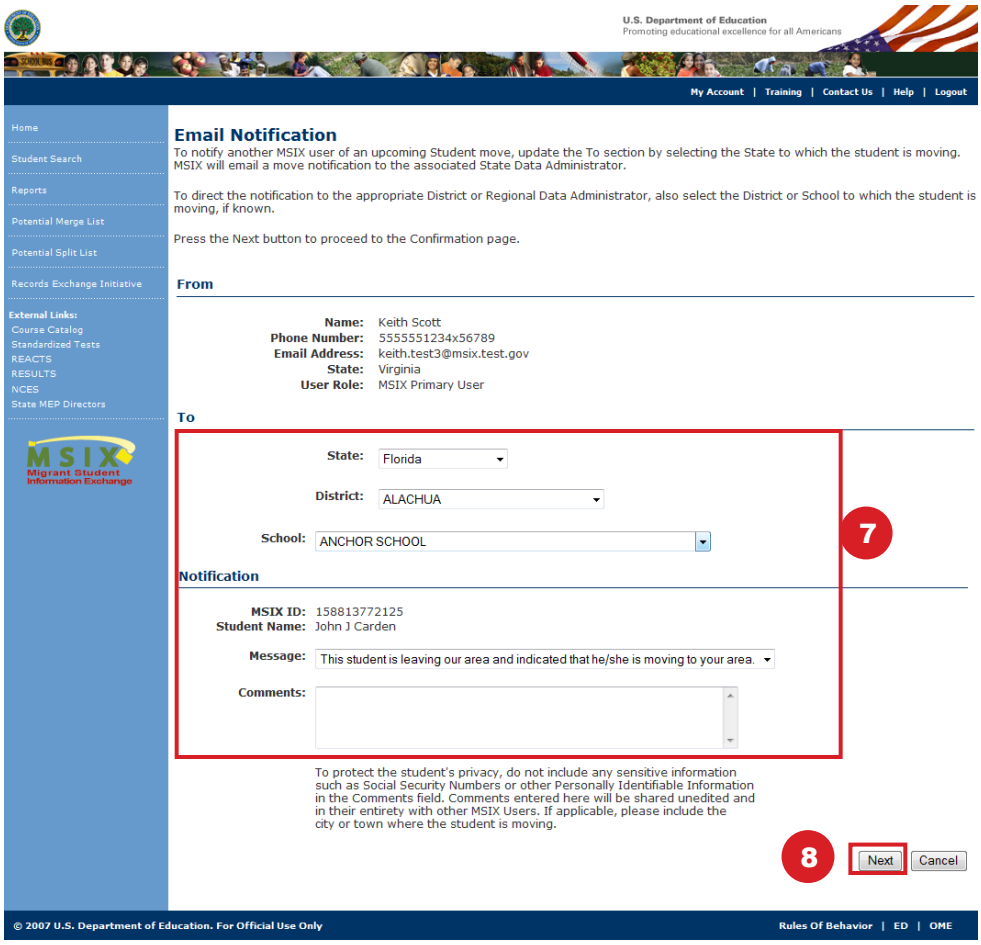
Begin the Email Notification Process

From this page, you can begin to send the email notification by clicking the **Send Notification** link.



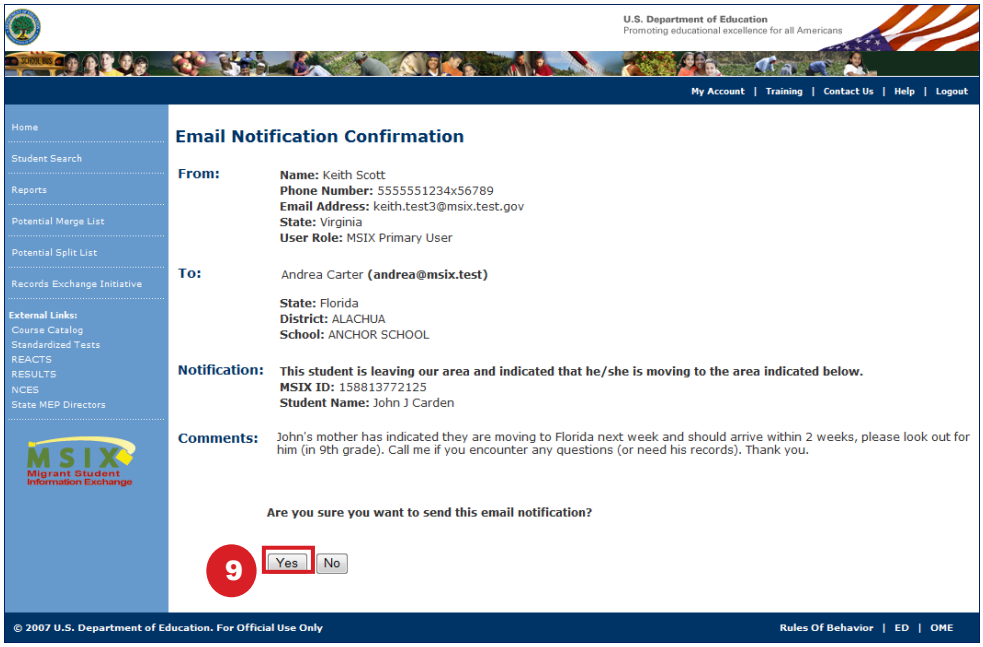
Select the New School Location

On this page you create the email notification to identify the state, district, and/or school to send the notification.



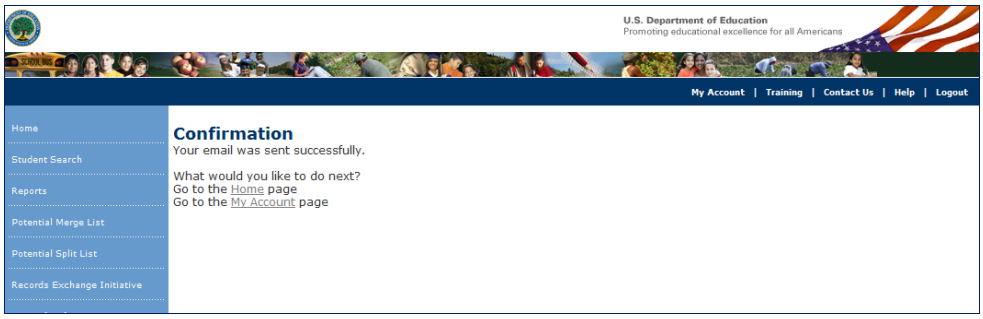
Verify the Email Content

On this page you verify the email message before you send it. This page will also indicate the MSIX user(s) who will receive the notification and their email addresses. Note this information for future reference if you need to follow up with that person.



Confirmation Page

Receive confirmation that the move notification e-mail was successfully sent.



Sent Email Notification Sample

This is an example of the email notification that is sent to the other state. The user who sent this notification will also receive this email.

From: Msix.Application@eds-orlando.com
To: Jennifer Dozier

Subject: This student is leaving our area and indicated that he/she is moving to the area indicated below.

This student is leaving our area and indicated that he/she is moving to the area indicated below.

First 3 Letters of Last Name: CAR
MSIX ID :158813772125

Move To:
State :Florida
District :ALACHUA
School :ANCHOR SCHOOL

This notification was sent by:
Keith Scott
Phone Number : 5555551234x56789
Email Address: keith.test3@msix.test.gov
State : Virginia
Role : MSIX Primary User

Comments:
John's mother has indicated they are moving to Florida next week and should arrive within 2 weeks, please look out for him (in 9th grade). Call me if you encounter any questions (or need his records). Thank you.

To view this student's record, log in to msix.ed.gov and click on "Student Search"

Please use the following link to access MSIX: https://msix.ed.gov.

If you have forgotten your login or password, please contact your appropriate User Administrator.

If you have questions regarding the contents of this email, please refer to the online help, user guide and other documentation available within MSIX. You may also contact the MSIX Support Team at msixsupport@deloitte.com.

This email account is not monitored.

Figure 3.2: Student Arrival/Departure Notification Sample

Section 4: Generating Reports

Generating reports is role-based and the data contained in the reports differ based on a user's permissions. The following table provides a summary of the Migrant Student Information Exchange (MSIX) reports by user role.

Report Folder	Report		Data Admin-istrator	Primary User	Second-ary User	User Admin-istrator	State Batch Submitter	State Regional Admin
Student Info	MSIX Student Count		✓	✓	✓			
	Student Demographic		✓	✓	✓			
	Student Enrollment	Enrollments by MDE Type	✓	✓	✓			
		Enrollments in Multiple States	✓	✓	✓			
	Student Course History		✓	✓	✓			
	Student Assessment		✓	✓	✓			
Student Mobility	General Move From		✓	✓	✓			
	General Move To		✓	✓	✓			
Data Quality	Data Load Files		✓				✓	
	Data Completeness		✓				✓	
	Data Validity		✓				✓	
	Potential Duplicates		✓					
User Account	Account List					✓		
Worklists	Worklist By User		✓					
	Worklist Aging		✓					

Table 4.1: MSIX Reports

This section includes the following topics:

- User Administrator Reports
- Data Administrator Reports
- Primary & Secondary User Reports
- Government Administrator Reports

The sections below provide a brief overview of the reports accessible to MSIX users. Please refer to the **MSIX Reports Manual** for comprehensive documentation on using the reports.

User Administrator Reports

MSIX provides User Administrators with one User Report to view information about the MSIX users in their states. The User Account List report is found under the Reports link on the Left-side Navigation on the User Administration home page. By clicking on that link, you will reach a Reports home page. There, you will click the User Reports folder and then the Account List link in the Left-side Navigation to open the User Account List report.

Data contained in the MSIX User Account List Report is based on information as of midnight the previous business day.

- **User Account List Report** — This report maintains records for all user accounts in the MSIX system. Reviews are also done to monitor whether a user is still actively using MSIX or if the account should be deactivated.

The table below gives a snapshot of the data fields or column headings found in the User Account List Report.

User Account List Reports Content	
Last Name	Roles
First Name	Account Creation Date
User ID	Account Activation Date
Account Status	Account Expiration Date
Accepted ROB	Last Login Date

Table 4.2: User Account List Report

Data Administrator Reports

MSIX provides Data Administrators with four (4) groups of reports: Student Info Reports, Student Mobility Reports, Worklist Reports and Data Quality Reports. The following reports are found in each group:

Student Info Reports

Student Info Reports folder contain six (6) reports on aggregate student data in MSIX. The table below provides a brief description of each report:

- **MSIX Student Count** — This report provides counts of distinct students in MSIX, students currently in near match worklists, and students with enrollment records in multiple states.

- **Student Demographic** — This report provides counts of student records by demographic data type including age, gender, Continuing Service Reason (CSR) and birth location.
- **Student Enrollment** — There are 2 reports within the student enrollment report folder:
  - **Enrollment by MDE Type** — This report provides counts of student records by enrollment data type including grade, enrollment type, Insufficient English Proficiency (IEP), Immunization Flag, Limited English Proficiency (LEP) indication, (PFS), MEP Project Type, and Med Alert.
  - **Enrollments in Multiple States** — This report gives counts of students with enrollments in the users state as well as another state.
- **Student Course History** — This report counts of course history records by course type.
- **Student Assessment** — This report provides counts of assessment records by assessment type.

Data Administrators have access to national-level data and their own state data only. Data Administrators can drill down to the student-level data by double-clicking a data row in the report. From here, the user can access the State Student ID, MSIX ID and Last Name of the students in the selected category and export the report to excel to save.

Student Mobility Reports

Student Mobility Reports folder contain two (2) reports on aggregate student moves in MSIX.

- **General Move From** — This report provides counts of students moves who have moved from the user's state to another based on qualifying moves or enrollment records.
- **General Move To** — This report provides counts of students moves who have moved to the user's state from another based on qualifying moves or enrollment records.

Worklist Reports

- **Worklists by User Report** — This report enables the user to view the worklists for all of the Data Administrators in the user's state.
- **Worklist Aging Report** — This report provides details of worklist items grouped by worklist type with the number of days they have been in progress.

Data Quality Reports

- **Data Load Files Report** — This report provides the number of student records loaded into MSIX that were without issues out of a total number received over a given period of time (day, week, month, year). It reports when file upload begins and ends, as well as the total number of records in the file.
- **Data Completeness Report** — This report provides counts of student records with incomplete data fields present. Data Administrators can drill down to the student level in this report to help Data Administrators identify the records with incomplete data.
- **Data Validity Report** — This report provides counts of student records with invalid data fields submitted by the user's state. Data Administrators can drill down to the student level in this report to help Data Administrators identify the records with invalid data.
- **Potential Duplicates Report** — This report provides potential duplicate records in the MSIX application. The purpose of this report is for Data Administrators to identify duplicate records and resolve them either in their state MEP systems or in MSIX.

Data contained in the MSIX Data Administrator reports reflects MSIX data as of midnight the previous business day. You can view a report or save the report to CSV (Excel) or PDF formats.

Primary & Secondary User Reports

MSIX provides Primary and Secondary Users with two groups of reports: Student Info Reports and Student Mobility Reports. The following reports are found in each report category:

Student Info Reports

Student Info Reports folder contain six (6) reports on aggregate student data in MSIX. The table below provides a brief description of each report:

- **MSIX Student Count** — This report provides counts of distinct students in MSIX, students currently in near match worklists, and students with enrollment records in multiple states.
- **Student Demographic** — This report provides counts of student records by demographic data type including age, gender, Continuing Service Reason (CSR) and birth location.
- **Student Enrollment** — There are 2 reports within the student enrollment report folder:
    - **Enrollment by MDE Type** — This report provides counts of student records by enrollment data type including grade, enrollment type, Insufficient English Proficiency (IEP), Immunization Flag,

Limited English Proficiency (LEP) indication, (PFS), MEP Project Type, and Med Alert.

- **Enrollments in Multiple States** — This report gives counts of students with enrollments in the users state as well as another state.

- **Student Course History** — This report counts of course history records by course type.
- **Student Assessment** — This report provides counts of assessment records by assessment type.

Primary and Secondary Users have access to national-level data and their own state data only. They can drill down to the student-level data by double-clicking a data row in the report. From here, the user can access the State Student ID, MSIX ID and Last Name of the students in the selected category and export the report to excel to save.

Student Mobility Reports

Student Mobility Reports folder contain two (2) reports on aggregate student moves in MSIX.

- **General Move From** — This report provides counts of students moves who have moved from the user's state to another based on qualifying moves or enrollment records.
- **General Move To** — This report provides counts of students moves who have moved to the user's state from another based on qualifying moves or enrollment records.

Data contained in the MSIX Primary & Secondary User reports reflects MSIX data as of midnight the previous business day. Users can view a report or save the report to CSV (Excel) or PDF formats.

Government Administrator Reports

MSIX provides Government Administrators with reports on the data loaded into the system, the interpretation of that data, and the use of the system at both the national and state-level.

Student Info Reports

The Student Info Reports folder contains six reports on the student record data in MSIX. The first five reports and filters for these reports are the same as that of the Student Info Reports for Data Administrators. The only difference in the content of the reports is that Government Administrators can view data at the state-level for all states, rather than just one. Government Administrators also have an additional report on the child count breakdown according to the CSPR

criteria that is not available to State users. The following are descriptions of the Student Info Reports:

- **MSIX Student Count** — This report provides counts of distinct students in MSIX, students currently in near match worklists, and students with enrollment records in multiple states.
- **Student Demographic** — This report provides counts of student records by demographic data type including age, gender, Continuing Service Reason (CSR) and birth location.
- **Student Enrollment** — There are 2 reports within the student enrollment report folder:
  - **Enrollment by MDE Type** — This report provides counts of student records by enrollment data type including grade, enrollment type, Insufficient English Proficiency (IEP), Immunization Flag, Limited English Proficiency (LEP) indication, (PFS), MEP Project Type, and Med Alert.
  - **Enrollments in Multiple States** — This report gives counts of students with enrollments in the users state as well as another state.
- **Student Course History** — This report counts of course history records by course type.
- **Student Assessment** — This report provides counts of assessment records by assessment type.
- **Child Count** – This report provides counts of Category 1 and Category 2 students for the current or previous school year as defined by the CSPR criteria.

Worklist Reports

The Worklist Reports folder contains two reports on the worklist items in each state by user and by age of unresolved worklist items. They include the following:

- **Worklists by User Report** — This report enables the user to view the worklists for all of the state's Data Administrators.
- **Worklist Aging Report** — This report provides worklist items grouped by worklist type with the number of days they have been in progress.

Data Quality Reports

The Data Quality Reports folder contains three reports on the quality of data loaded into MSIX, based on the files uploaded to the system, the completeness of the content of those files, and the validity of the MDE elements contained in the files.

- **Data Load Files Report** — This report provides the number of student records loaded into MSIX that were without issues out of a total number

received over a given period of time (day, week, month, year). It reports when file upload begins and ends, as well as the total number of records in the file by state.

- **Data Completeness Report** — This report provides the number and percentage of student records that were uploaded with incomplete data out of the total number received that were loaded into MSIX over a given period of time.
- **Data Validity Report** — This report provides the number and percentage of student records with invalid entries, by MDE field, out of a total number received that were loaded into MSIX over a given period of time.
- **Potential Duplicates Report** — This report provides potential duplicate records in the MSIX application. The purpose of this report is for Data Administrators to identify duplicate records and resolve them either in their state MEP systems or in MSIX. Government Administrators cannot see the demographic information of the potential student records as Data Administrators can.

Student Mobility Reports

The Student Mobility Reports provide counts of students who have moved based on the enrollments of the state they have moved from and states they have moved to. It contains the following reports:

- **General Move From** — Provides the number of student moves according to closed enrollments from one state and newer enrollments in another state, or qualifying moves out of one state into another.
- **General Move To** — Provides the number of student moves according to closed enrollments from one state and newer enrollments in another state, or qualifying moves into the state from another.

MSIX Usage Report

- **MSIX Usage Report** — This report details that usage of the MSIX system. It breaks the usage down by time frame and area of the site.
- **Student Records Exchange** — This report provides counts of student records in one state viewed by MSIX users in another state. It gives Government Administrators a snapshot of the records exchanged from one state to another in a given time period.

Data contained in the MSIX Government Administrator reports reflects MSIX data as of midnight the previous business day. Government Administrators can view a report or save the report to CSV (Excel) or PDF formats for future reference.

Government Administrators are also provided with MSIX Dashboards.

The MSIX Dashboards provide charts on MSIX activity, usage, and quality metrics at a high-level. They are broken down into two dashboards, described below:

Dashboard 1

- **Records Exchange -** The Records Exchange chart shows the Top 10 states that have viewed the most student records from other states; it is based on the most recent completed month's activity.
- **Recent Moves** - The Recent Moves chart shows the total count Qualifying Moves at a National level by month for the past 12 months. The counts are based on the most recent completed month's data (for example, on August 1, users will see the data from all of July).
- **MSIX Usage** - The MSIX Usage chart provides national usage data across functional categories in MSIX. Each stacked bar is broken down by Admin, Documentation, Report, Student, and Worklist related functionality. Counts are displayed by month and are based on application views for the previous year including the most recent completed month.
- **MSIX User Count** - The MSIX User Count chart has two lines that both represent National user data. The Orange line shows the count of New Users that were introduced to MSIX during that month. The Green line shows the number of User Logins that occurred that month. The counts are based on the most recent completed month's data (for example, on August 1, users will see the data from all of July).

Dashboard 2

- **Student Assessment -** The Student Assessment chart shows the percent of eligible 3rd-12th grade students nationwide that have assessment data loaded into MSIX. This metric is collected once per weekday and is rendered as an average percentage on a monthly basis, displayed on the first day of the following month.
- **Student Course History -** The Student Course History chart shows the percentage of eligible secondary students nationwide that have course history data loaded into MSIX. This metric is calculated each month to show progress over time. This metric is collected once per weekday and is rendered as an average percentage on a monthly basis, displayed on the first day of the following month.
- **Data Completeness** - The Data Completeness chart provides an overview of how complete MSIX data is nationally. Each color represents a range of percent completeness and the size of the slice represents the number of MDEs that fall within that range. The chart is based on information as of midnight the previous business day.

- **Data Validity** - The Data Validity chart provides an overview of how valid MSIX data is nationally. Each color represents a range of percent valid and the size of the slice represents the number of MDEs that fall with that range. The chart is based on information as of midnight the previous business day.

Generating a Report

Reports can be generated by User Administrators, Primary Users, Secondary Users, Data Administrators, and Government Administrators at the state and national level via the 'Reports' link in the left-side navigation pane.

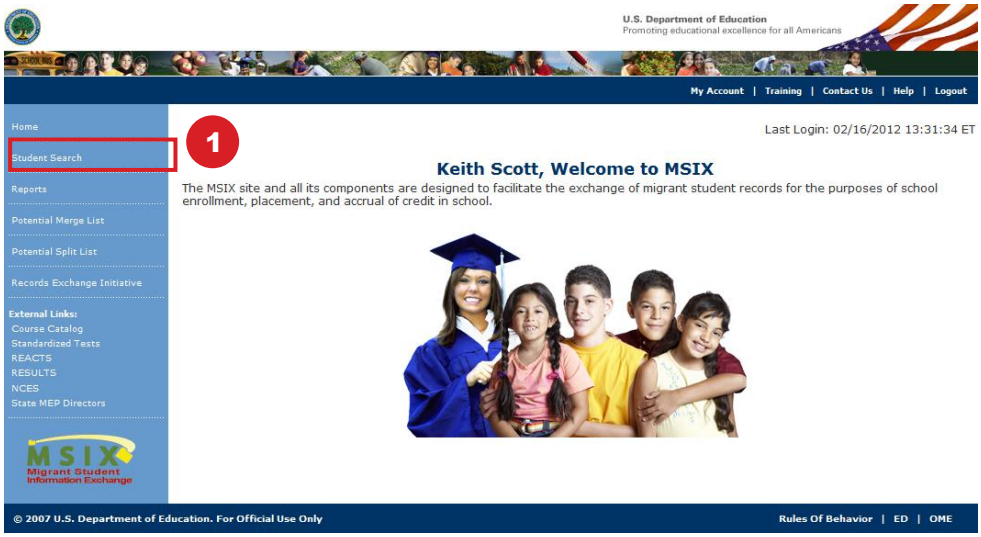
Steps to Generate a Report

1. Click the **Reports** link in the Left-side Navigation.

2. You will go the Reports home page where you can make your next selection. The reports fall into the categories: User Reports (which includes the Account List Report), Student Info Reports, Student Mobility Reports, Worklist Reports, and Data Quality Reports

Access the Reports Link

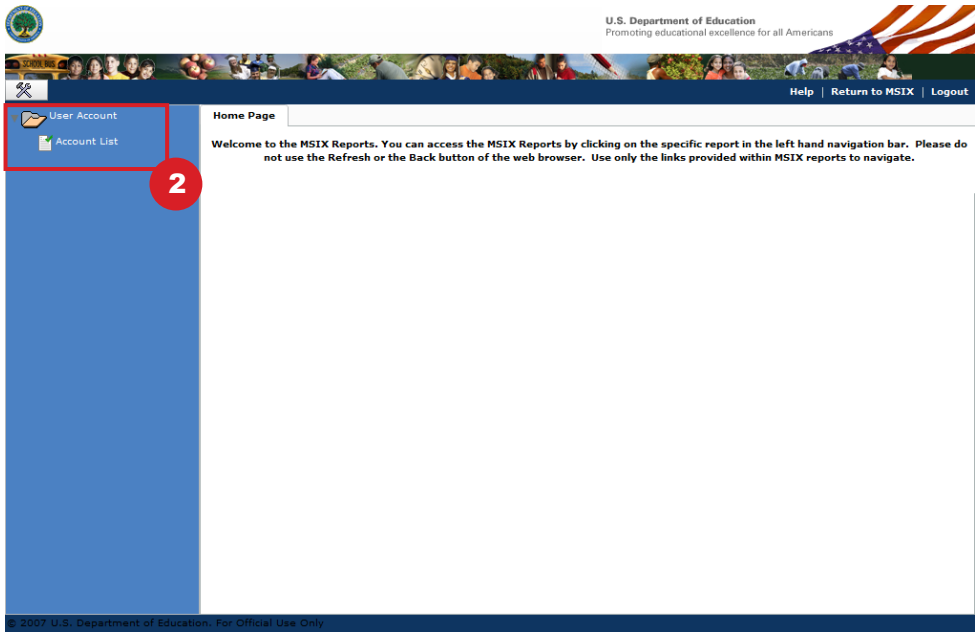
Click the Reports link to reach the reports dashboard page.



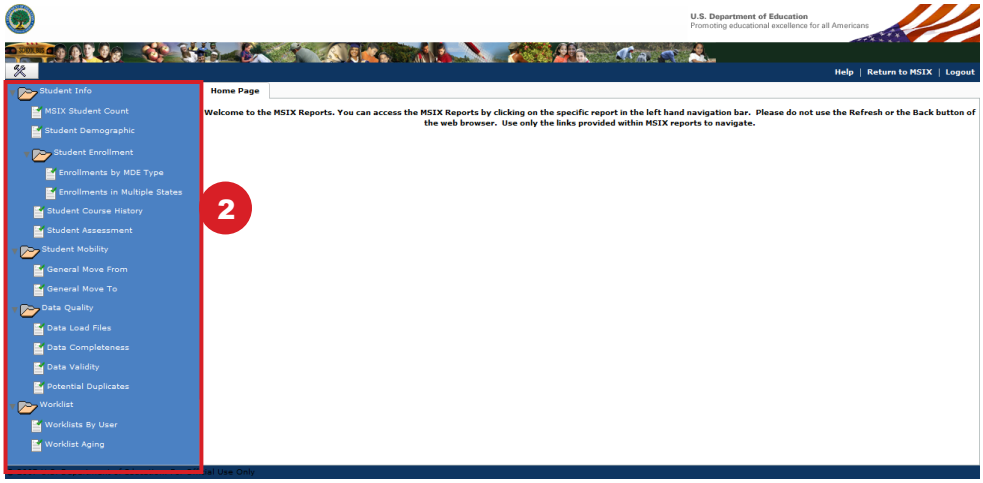
Use the Reports Home Page to Select Your Report

The reports that you have permission to view will be shown on the left-side menu at the Reports Home Page. The screenshots below provide visual breakdowns of the reports by role. Some users have multiple user-roles and therefore have combinations of the following Reports Home Page screen views.

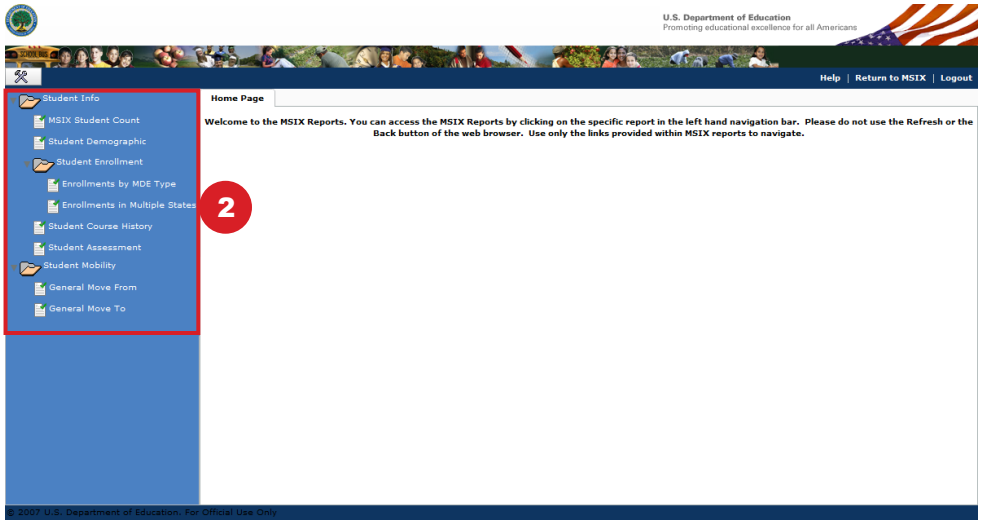
(1) The **User Administrator** will see the following Reports home page.



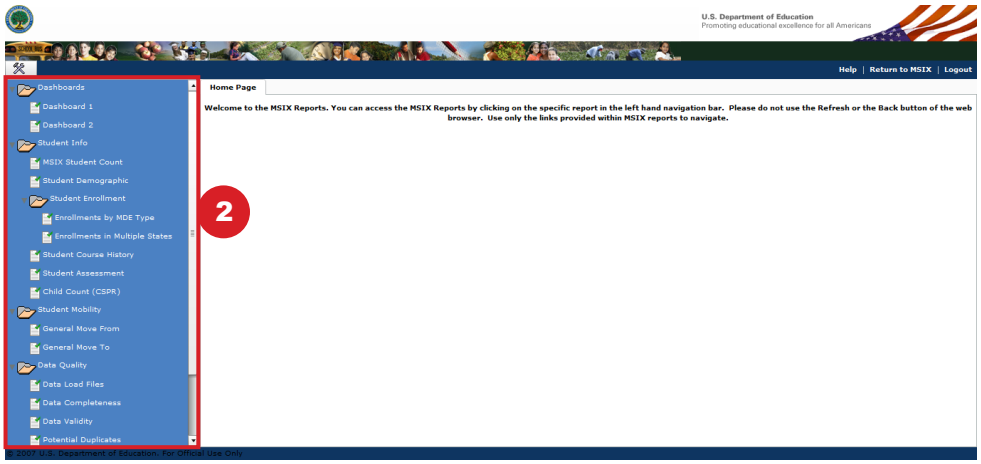
(2) The **Data Administrator** will see the following Reports home page.



(3) The **Primary and Secondary User** will see the following Reports home page.



(3) The **Government Administrator** will see the following series of pages.



Section 5: Merging and Splitting Records

At the heart of the Migrant Student Information Exchange (MSIX) is the ability to collect, review, and reconcile migrant student records nationwide to result in one unified database. This is accomplished by both electronic means and through human intervention. This data management effort seeks to merge records where duplicates are found and split records where they may have been merged in error.

The tasks around merging and splitting are limited to MSIX Primary Users, State Data Administrators, Regional Data Administrators, and District Data Administrators. This section includes the following topics:

- MSIX Data Management
  - Data Management by the MSIX Application
  - Data Management by MSIX Users
- Merging/Combining Student Records
  - Processing a Near Match Merge
    - Evaluating a Near Match
    - Validating or Rejecting a (Near Match) Merge
  - Processing a User Initiated Merge
    - Submitting a User Initiated Merge
    - Canceling a User Initiated Merge
    - Validating or Rejecting a User Initiated Merge
- Splitting/Separating Student Records
  - Processing a User Initiated Split
    - Submitting a User Initiated Split
    - Canceling a User Initiated Split
    - Validating or Rejecting a User Initiated Split
- Escalating Merge and Split Requests
- Reassigning Merge and Split Requests
- Viewing Details of Historical Merge or Split Requests

MSIX Data Management

Student records are uploaded into MSIX from states periodically to ensure the MSIX database has the most recent and comprehensive information. There are two ways this information is managed:

- **By the MSIX Application** — When a record is uploaded, MSIX reviews the record to analyze whether it already exists in MSIX or is a new record.
- **By Human Intervention** — At any time after the student record is in the MSIX database, a user can intervene to initiate merging/combining or splitting/separating the record.

Data Management by the MSIX Application

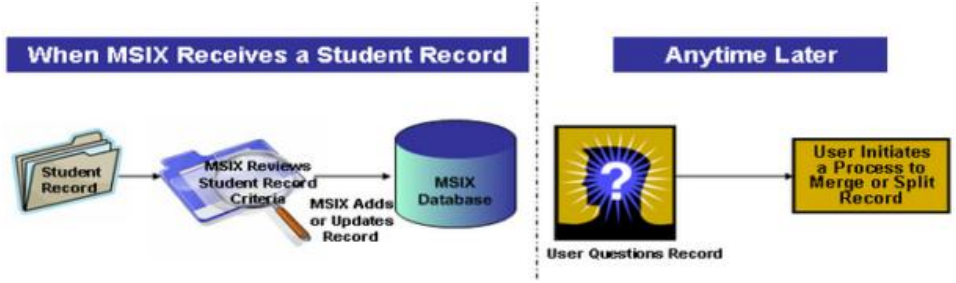


Figure 5.1: MSIX Data Management

When student records are imported into MSIX, they are evaluated to determine if they are new or potentially match an existing MSIX record. This is done with a "Matching Engine" that produces a Matching Score using several pieces of demographic data. Based on the resulting score, one of the following occurs::

- **New MSIX Record** — No existing record matches, so a new record is created.
- **Merge** — The new record *closely matches* an existing MSIX record and is combined or merged with that record.
- **Near Match** — The new record *somewhat matches* an existing MSIX record, but the results are not conclusive. Therefore, human review by a State, Regional, or District Data Administrator is required to validate if the record does match a student record or is a new record.

Record	Matching Score Results
New MSIX Record	Sufficiently different from any other MSIX record
Merge	Over a specified level that indicates a close match
Near Match	Somewhere between the Merge and New MSIX Record thresholds

Table 5.1: Matching Engine Results

Data Management by MSIX Users

The MSIX Matching Engine is the initial activity to review student records for similarity. However, situations may arise when a user realizes that student records should be reconciled by merging or splitting the records:

- **Merge** — If more than one record exists for the same student, the records should be merged/joined together to result in one MSIX ID. A Primary User or a Data Administrator can request a merge using the Initiate Merge process.
- **Split** — If one record exists for two students, the records should be split/separated to result in two MSIX IDs. A Primary User or a Data Administrator can request a split using the Initiate Split process.

A merge or split that is initiated by a user is sent to a State, Regional, or District Data Administrator to review the record. If a Data Administrator initiates the request, it is sent to another Data Administrator for review.

Merging/Combining Student Records

A key MSIX feature is to link or merge a student's records from multiple states so all of the student's information is contained in a single MSIX record. Student record merges are identified automatically when state files are loaded into MSIX. The MSIX Matching Engine scores matched records based on the demographic data they contain. If records match over a specified score threshold, they are automatically merged. If the matching score indicates that a new record is sufficiently different from any other record in MSIX, a new MSIX ID is automatically created.

The Merge Process begins in one of two ways: (1) when multiple records are identified by the MSIX Matching Engine as a "Near Match" and therefore are a candidate for merging or (2) when an MSIX user initiates a record merge.

(1) Near Match Merges — Matches that score between the merge and new record thresholds are considered to be "near matches." These records require human review by a Data Administrator to determine whether or not they are a match or a new student record.

(2) User Initiated Merges — A user may find while searching student records that two or more records are clearly for the same student, but have separate MSIX IDs. The user would initiate a record merge, which is automatically routed to the Data Administrators for any open student enrollments on the student record.

Data Administrators review the merge and validate or reject a user-initiated merge if they determine that the records should remain separate.

This sub-section will include the following topics:

- Processing a Near Match Merge
    - Evaluating a Near Match
    - Validating or Rejecting a (Near Match) Merge
- Processing a User Initiated Merge
    - Submitting a User Initiated Merge
    - Canceling a User Initiated Merge

- Validating or Rejecting a User Initiated Merge

Processing a Near Match Merge

A Near Match involves student records that the MSIX Matching Engine found to be a close but not an absolute match. A Data Administrator must intervene to determine whether student records should be merged or remain separate. The figure below reflects the process workflow for a Near Match.

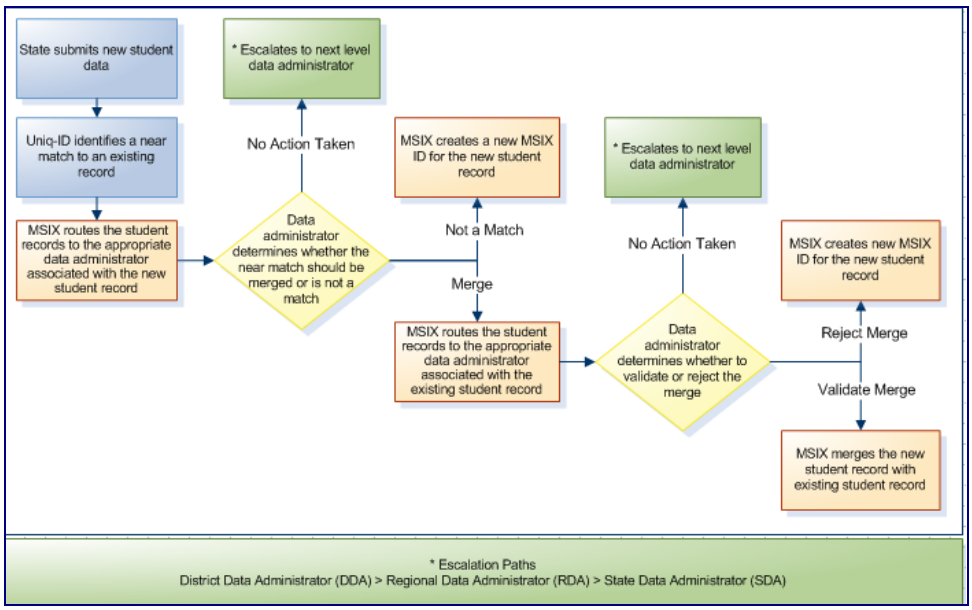


Figure 5.2: Workflow for Near Match Resolution

There are basically two phases in processing a Near Match.

- Phase 1: Evaluation — The Near Match needs to be reviewed to evaluate its legitimacy (i.e., make a decision to merge or leave it as two records).
- Phase 2: Validation or Rejection — The Near Match must be validated as a merge or reject and remain as separate records (i.e., follow through on the decision).

Once a near match has been validated by the State, Regional, or District Data Administrator, MSIX reflects that student record change, which is visible through the Student Search.

Evaluating a Near Match

Steps to Evaluate a Near Match

1. Click the **Worklist** link on the Left-side Navigation, which will take you to the "Worklist" page.

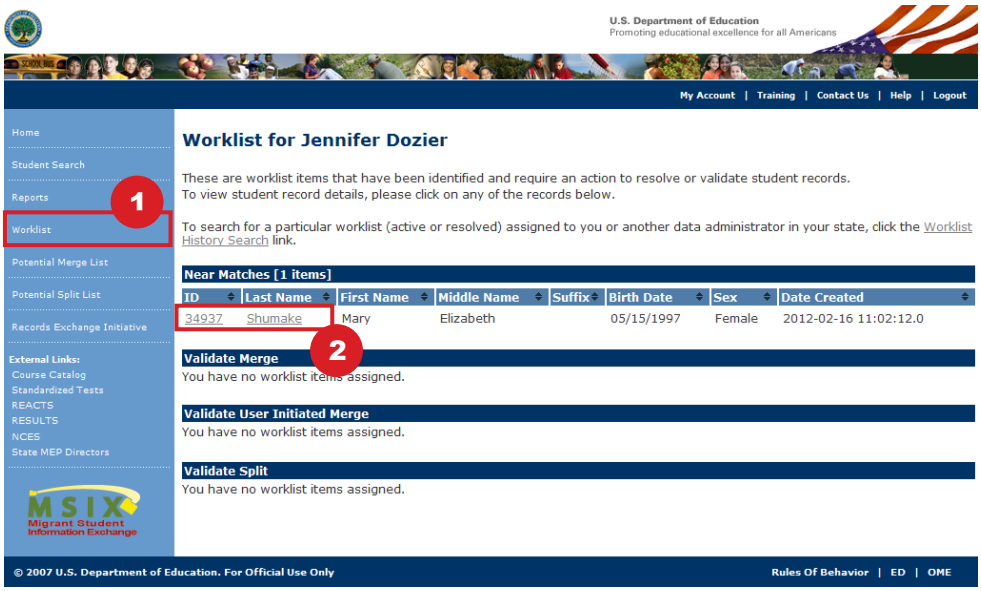
2. On the "Worklist" page, click on a student record link under the **Near Matches** heading.

3. If applicable, enter a justification in the comment field. The comment field may contain up to 250 characters. To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information. The comments will be shared unedited and in their entirety with other MSIX Users.

4. Review the records to determine if they should be joined or remain separate as they are. If you decide to leave the records unchanged, click the **Not a Match** button. If you decide to combine the records, click the **Merge Record** button.

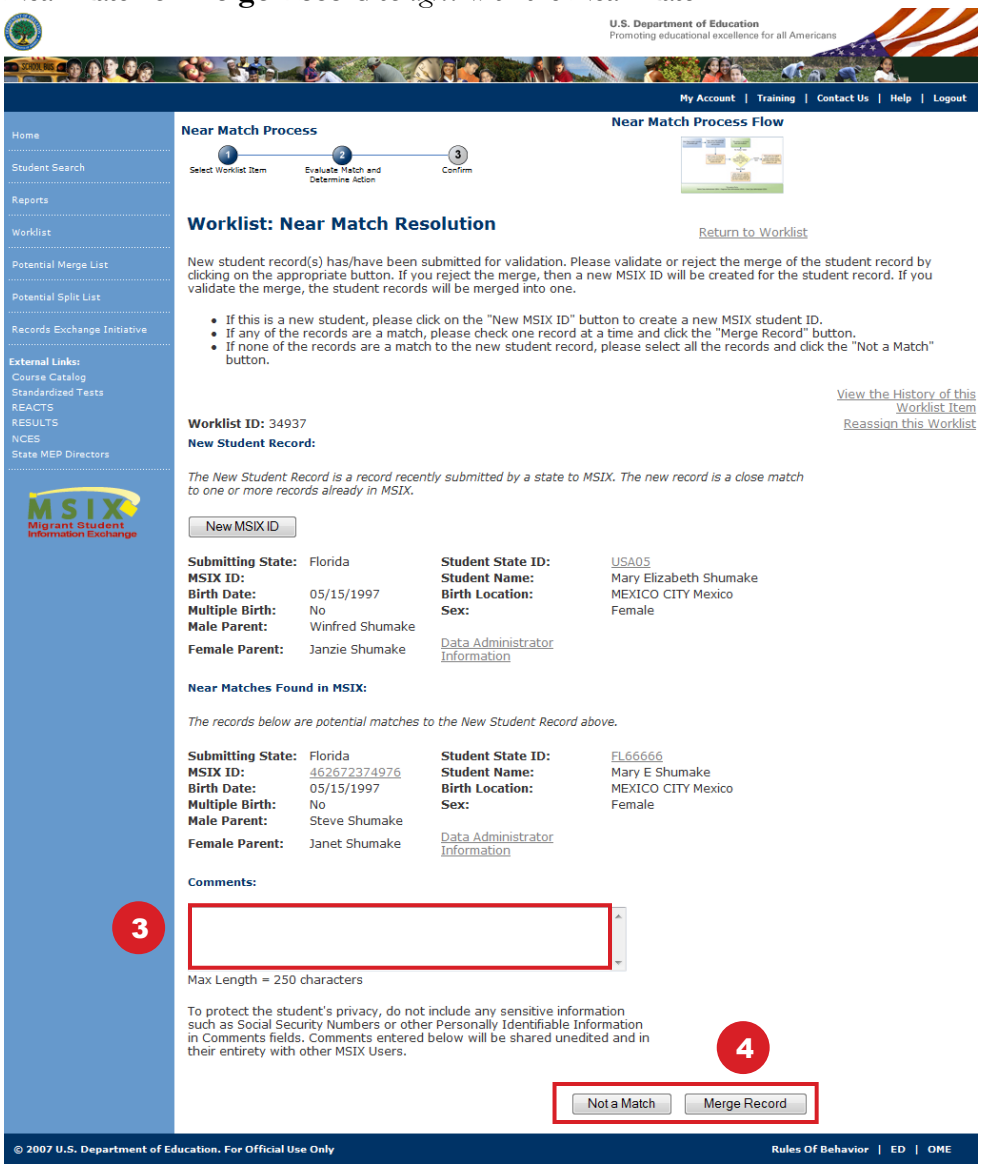
Access and Review the Worklist

The Worklist displays the assigned merge or split validation task(s).



Add a Comment (if appropriate) and Make a Decision

The "Near Match Resolution" page displays the near match records that require human resolution. Based on your decision, click **Not a Match** to *disagree* with the Near Match or **Merge Record** to *agree* with the Near Match.



BOTH A MERGE CONFIRMATION AND REJECT CONFIRMATION ARE SHOWN

Review the Near Match Merge Confirmation

The "Confirmation" page indicates that the records were successfully merged and that a State, Regional, or District Data Administrator was notified to review and Validate the Merge.

Review the Near Match Reject Confirmation

The "Confirmation" page verifies that the students were not merged and a new MSIX ID was created for the new student record.

Validating or Rejecting a (Near Match) Merge

Once a Near Match has been resolved, it needs to be validated or rejected. At this point it is in the 'Pending Validation' stage in a user's worklist. Once a near match has been validated by the State, Regional, or District Data Administrator, MSIX reflects that student record change, which is visible through the Student Search page.

Steps to Validate or Reject a (Near Match) Merge

1. Click the **Worklist** link on the Left-side Navigation, which will take you to the "Worklist" page.

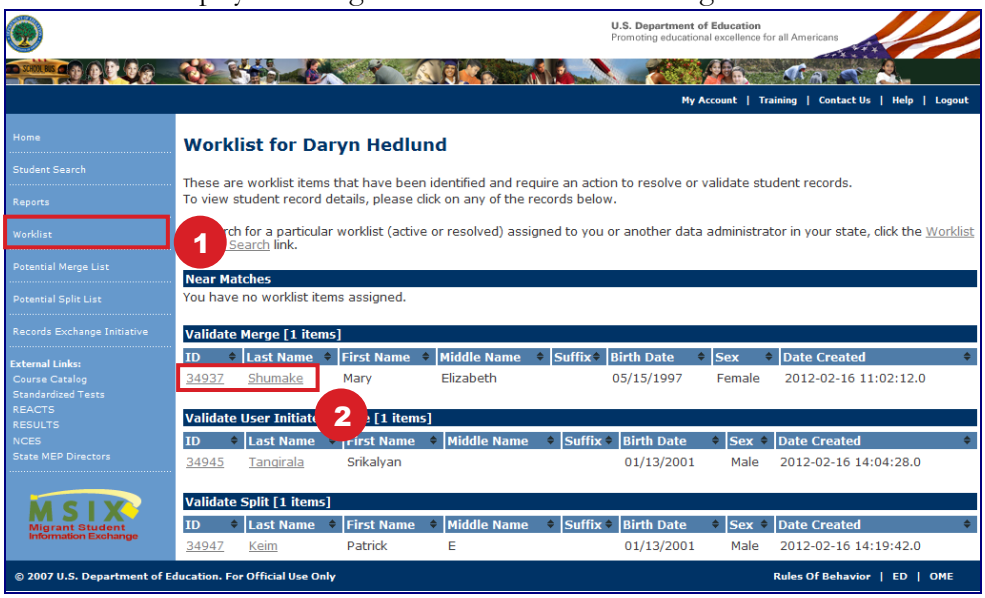
2. On the "Worklist" page, select an item by clicking on a **Student Record** link under the "Validate Merge" column heading.

3. If applicable, enter a justification in the comment field. The comment field may contain up to 250 characters. To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information. The comments will be shared unedited and in their entirety with other MSIX users.

4. Review the records to determine if they should be joined or remain as they are. If you decide to leave the *records unchanged*, click the **Reject Merge** button. If you decide to *combine the records*, click the **Validate Merge** button.

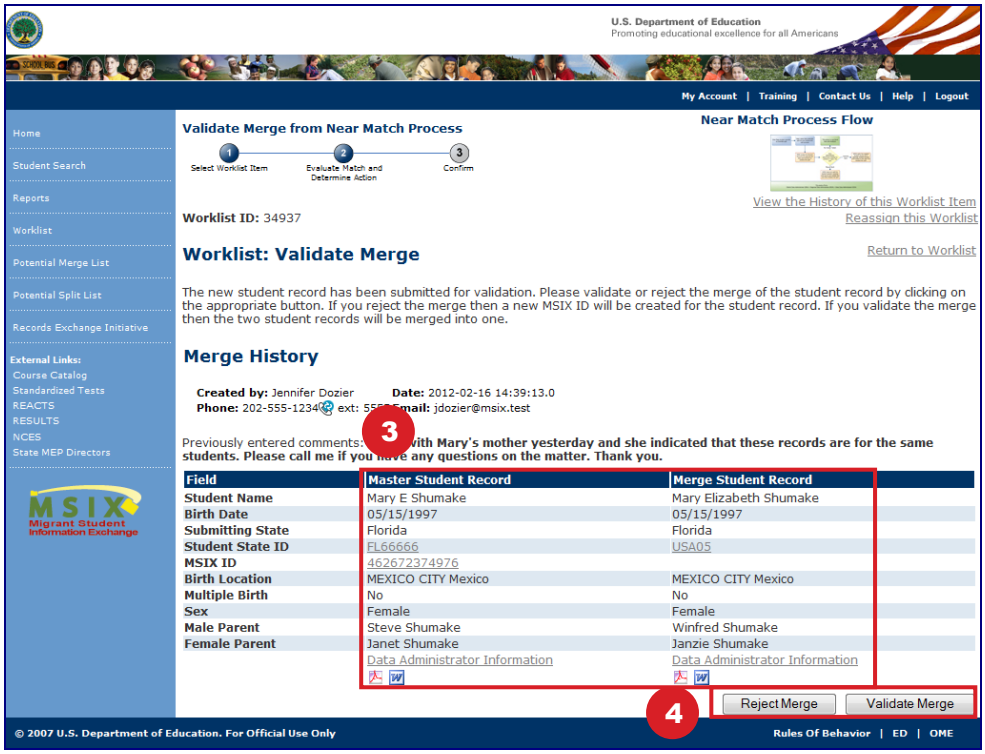
Access and Review the Worklist

The Worklist displays the assigned match resolution or merge validation tasks.



Validate or Reject the Merge

Validate Merge allows you to validate or reject student record merge requests.



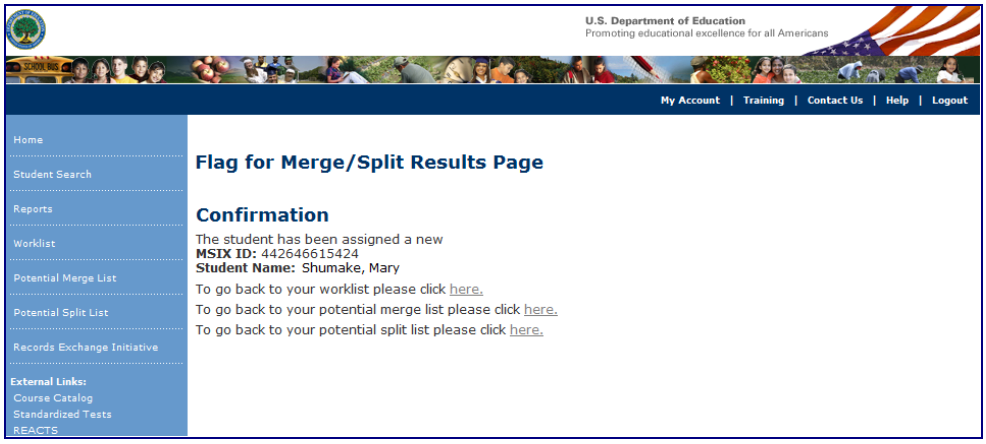
BOTH A MERGE CONFIRMATION AND REJECT CONFIRMATION ARE SHOWN

Validate Merge Confirmation

The sample "Confirmation" page below is the result if you select the **Validate Merge** button.

Reject Merge Confirmation

The sample Confirmation page below is the result if you select the **Reject Merge** button.



Merge Completion Notification

The email notification is sent to the Data Administrator who approved the Near Match to confirm that the Match has been accepted. If the Data Administrator has set his/her preferences to receive batch emails (on a daily basis), the content of this email will be imbedded within the daily consolidated notification.

From: Msix.Application@eds-orlando.com
To: Jennifer Dozier

Subject: MSIX Near Match Validation Worklist Item

Hello Jennifer Dozier,

Your request to merge the student records in MSIX has been approved:
Student Last Name: Tangirala
Worklist Item ID: 34937

Please use the following link to access MSIX: http://msix.ed.gov.

If you have forgotten your login or password, please contact your appropriate User Administrator.
If you have questions regarding the contents of this email, please refer to the online help, user guide and other documentation available within MSIX. You may also contact the MSIX Support Team at msixsupport@deloitte.com.
This email account is not monitored.

Figure 5.3: Sample Merge Acceptance Email

Merge Rejection Notification

The email notification is sent to the Data Administrator who approved the Near Match to confirm that the Match has been rejected.

From: Msix.Application@eds-orlando.com
To: Jennifer Dozier

Subject: MSIX Near Match Validation Worklist Item

Hello Jennifer Dozier,

Your request to merge the student records in MSIX has been rejected:
Student Last Name: Tangirala
Worklist Item ID: 34937

Please use the following link to access MSIX: http://msix.ed.gov.

If you have forgotten your login or password, please contact your appropriate User Administrator.
If you have questions regarding the contents of this email, please refer to the online help, user guide and other documentation available within MSIX. You may also contact the MSIX Support Team at msixsupport@deloitte.com.
This email account is not monitored.

Figure 5.4: Sample Merge Rejected Email

Processing a User Initiated Merge

A user can initiate a merge when one or more records appear to belong to the same student. A Primary User or a Data Administrator can request a merge using the Initiate Merge process. Once a merge has been initiated, MSIX automatically notifies a State, Regional, or District Data Administrator to review and validate the merge. The figure below reflects the process workflow for User Initiated Merge.

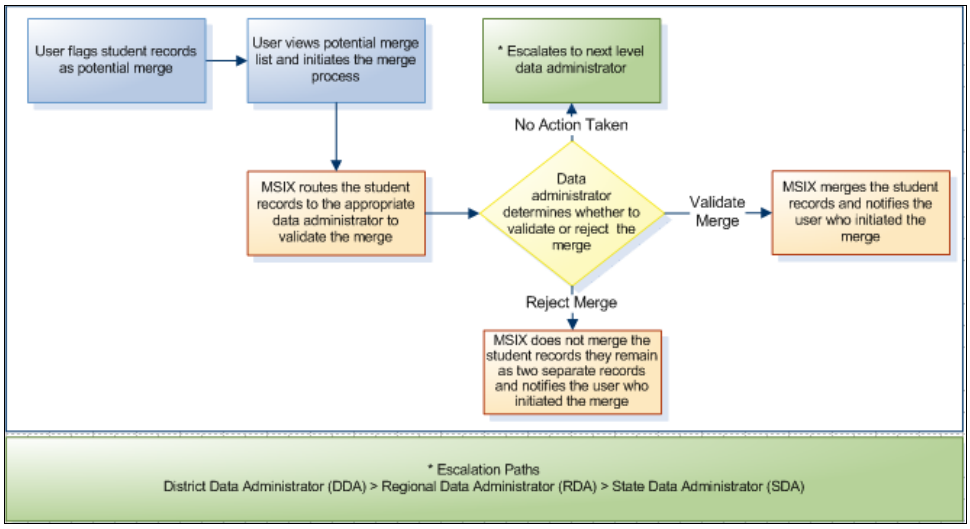


Figure 5.5: Workflow for User Initiated Merge

Submitting a User Initiated Merge

As a Primary User or Data Administrator, you can flag a student record for a potential merge if it appears that two or more records actually belong to the same student. A user determines that student records should be merged when searching and displaying student records if he or she finds records which are clearly for the same student, but have two separate MSIX IDs. The user may then initiate a record merge. These merges are then routed by MSIX to the appropriate State, Regional, or District Data Administrators, based upon the open student enrollments in the student record.

Merge Error Message

MSIX displays an error message if you attempt to flag a student for merge that has already been flagged by another user. You may see the following error messages:

Merge Error Message	
Scenario	**Error Message**
Another User has Flagged the Student for Merge	MSIX was unable to flag these records for merge/split. See section "Unsuccessful Merge Flag Attempts" for further information. Click here for a list of Data Administrators associated with these students.
Student record is currently in a near match worklist item.	MSIX was unable to flag these records for merge/split. See section "Unsuccessful Merge Flag Attempts" for further information. Click here for a list of Data Administrators associated with these students.

Table 5.2: Merge Error Message

Steps to Initiate a Merge

1. Search for all students who qualify for potential merge. Select an **Individual Student Record MSIX ID** link from the list on the "Search Results for Student" page. At this point, it is *assumed* that you have reviewed the student records thoroughly using the "Consolidated Student Record View" (showing the most recent information) and the Historical Student Record View" (showing all information about the records).

2. You can flag the records for merge by using either of two methods: (a) the "Search Results for Student" page or (b) the "Consolidated Student View Record" page.

   Option A: "Search Results for Student" Page — For each potentially matching student, select the option box next to the student name. Then, click the **Flag Record(s) for Merge** button to add the record to the Potential Merge List.

   Option B: "Consolidated Student View Record" Page — For each potentially matching student, click on the **Flag Record for Merge** button to add the record to the Potential Merge List.

3. Click on the **Potential Merge List** link in the left navigation.

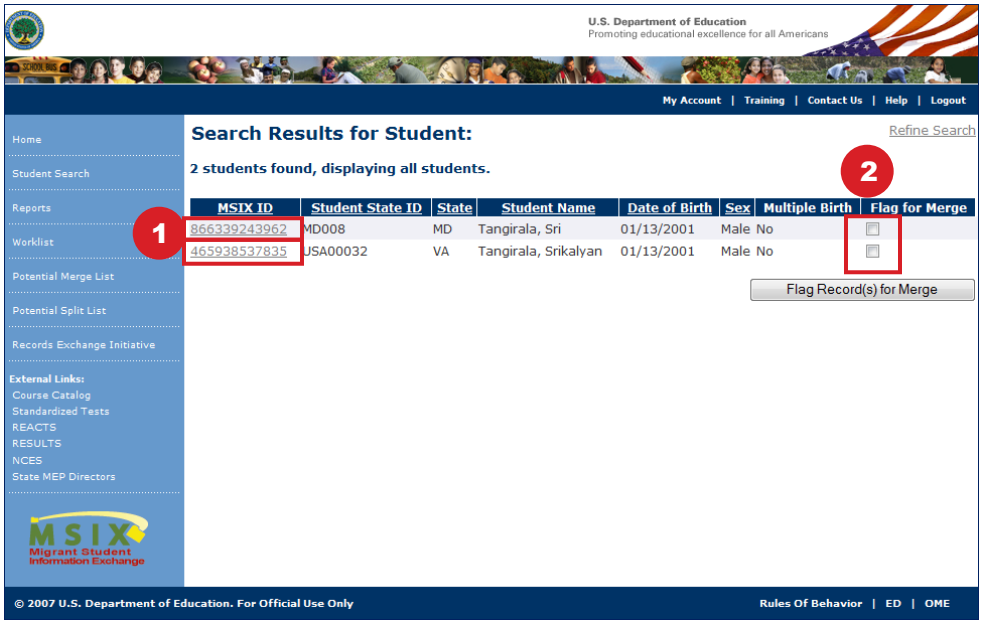
4. Select the student records to merge and click the **Process Merge** button.

5. Select the record to be the **Master Student Record**. The master student record is the one which keeps the current MSIX ID. The other student records are combined into the master student record's MSIX ID.

6. Click the **Merge** button.

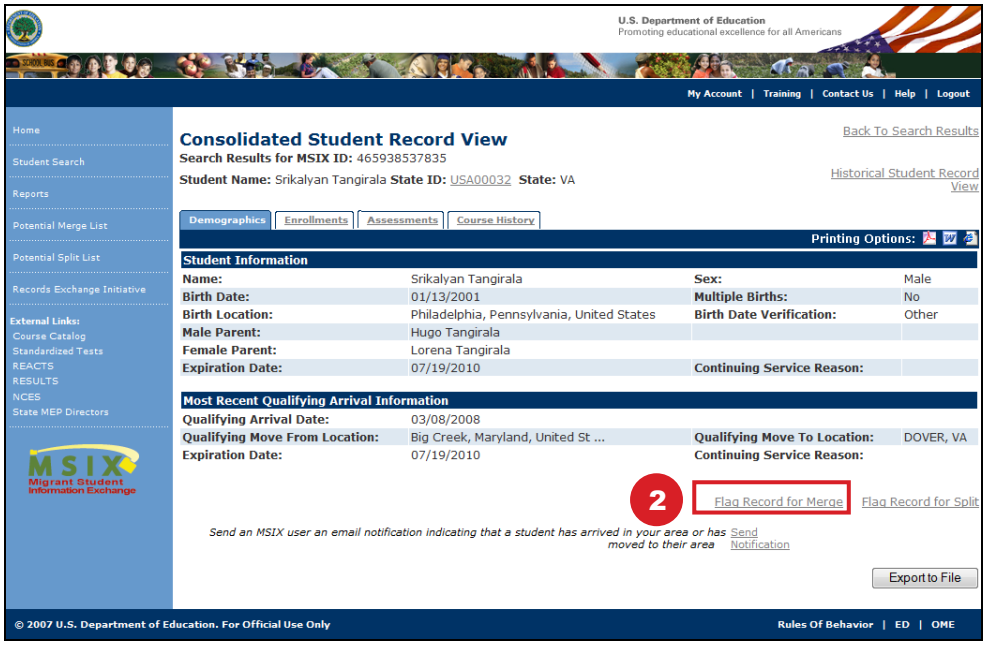
Locate Student Records to Merge

This page displays the results returned from your search. Here, you can use Option A and check the option next to the student names and **Flag the Record(s) for Merge**.



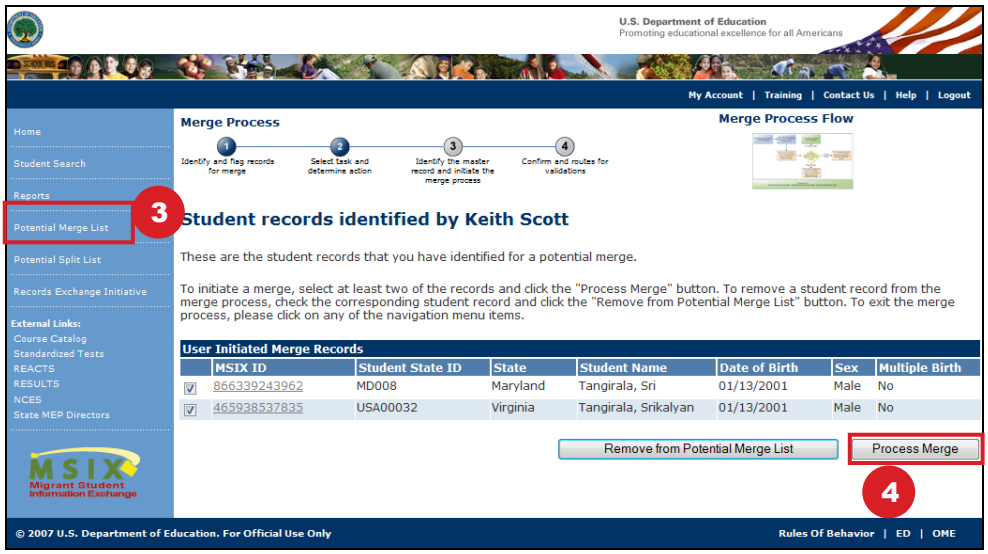
Use Option B to Flag Record for Merge on the Consolidated Student View

On a "Consolidated Student Record View" page, you can flag a record for merge.



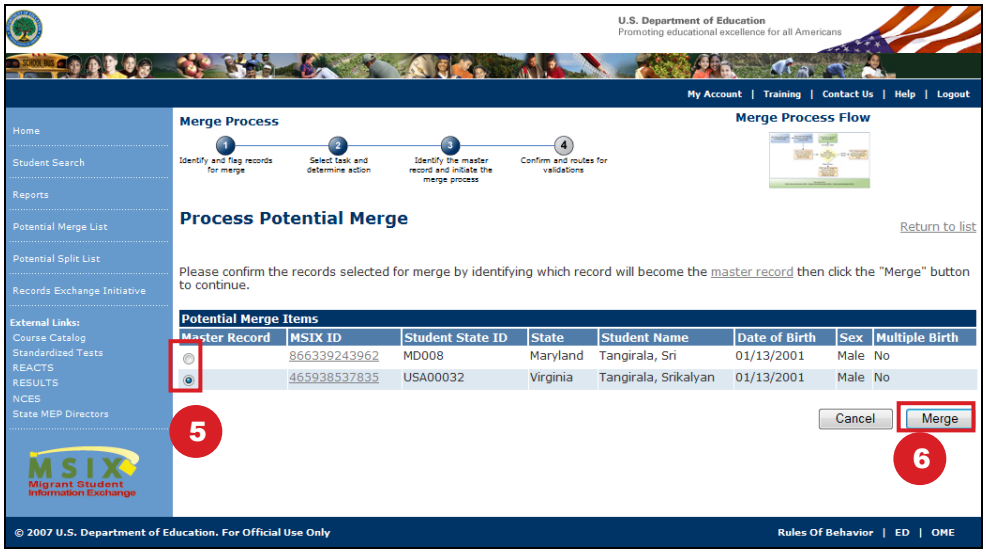
Process the Merge from the "Potential Merge List"

The "User Initiated Merge Records" list displays the student records that have been flagged for merge.



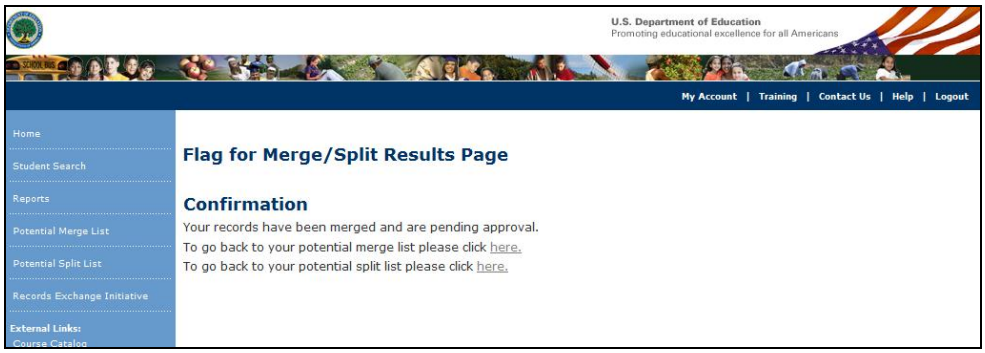
Select the Master Student Record

Select the option for MSIX ID that will be the master student record.



View the Merge Confirmation

The confirmation page indicates the merge was successfully initiated and has been routed to a Data Administrator for validation.



Canceling a User Initiated Merge

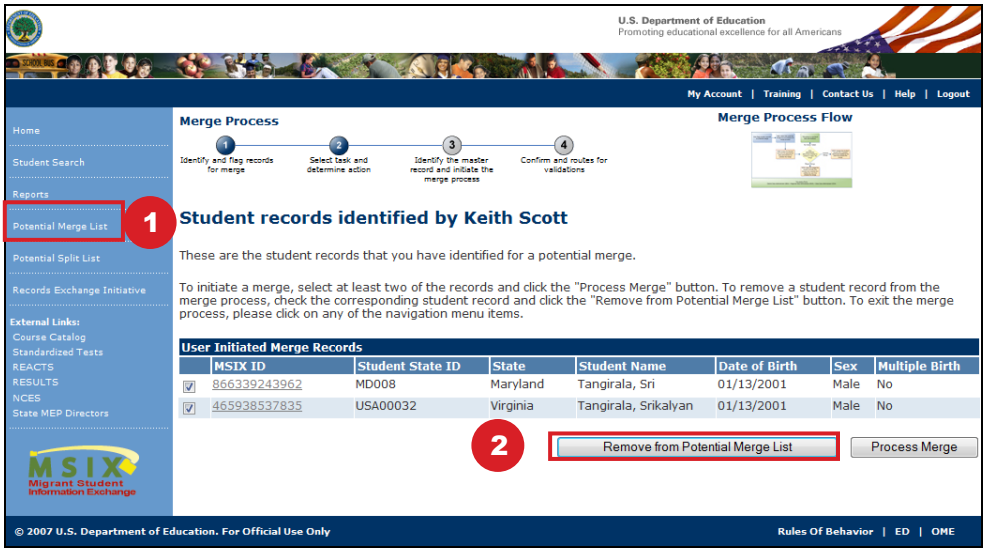
Primary Users and Data Administrators can cancel a request for a student record merge if needed. It is possible that you would learn more about the student records and determine the records should remain separate. You can cancel the merge request to prevent it from going further into the Merge Process.

Steps to Cancel a Merge

1. Click on the **Potential Merge List** link in the Left-side Navigation.
2. Select the student records to remove from the Potential Merge list by checking the option box. Then, click the **Cancel Merge** button.

Access and Remove the Potential Merge

The Potential Merge List displays records to remove from the Potential Merge.



View the Cancel Merge Confirmation
The "Confirmation" page verifies the merge was canceled and the records removed from the Potential Merge List.

Validating or Rejecting a User Initiated Merge

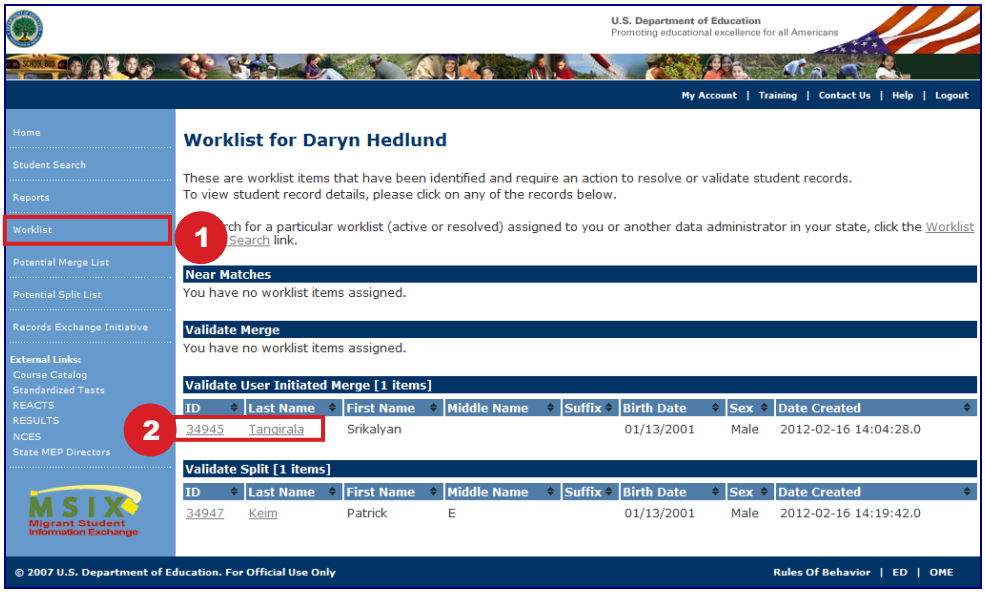
This MSIX function allows you to validate or reject a user initiated student record merge request. Once a near match, merge or split has been validated by the State, Regional, or District Data Administrator, MSIX reflects that change, which is visible through the Student Search page.

Steps to Validate or Reject a User Initiated Merge

1. Click the **Worklist** link on the Left-side Navigation.
2. On the Worklist page, click on a **Student Record** link under the Validate User Initiated Merge heading.
3. If applicable, enter a justification in the comment field. The comment field may contain up to 250 characters. To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information. The comments will be shared unedited and in their entirety with other MSIX users.
4. Review the records to determine if they should be joined or remain as they are. If you decide to leave the records as they are, click the **Reject Merge** button. If you decide to combine the records, click the **Validate Merge** button.

Access and Review the Worklist

The Worklist displays the match resolution, merge or split validation tasks. Select the student record that is under consideration.



Validate or Reject the User Initiated Merge

Validate User Initiated Merge allows you to validate or reject merge requests.

BOTH A MERGE CONFIRMATION AND REJECT CONFIRMATION ARE SHOWN

Validate Merge Confirmation

The sample "Confirmation" page below is the result if you select the **Validate Merge** button.

Reject Merge Confirmation

The sample "Confirmation" page below is the result if you select the **Reject Merge** button.

Merge Notification

The email notification is sent to the user who initiated the merge to confirm that the Merge has been accepted. If the user made any comments about the worklist item, they would also be displayed in this e-mail. If the Data Administrator has set his/her preferences to receive batch emails (on a daily basis), the content of this email will be imbedded within the daily consolidated notification.

From: Msix.Application@eds-orlando.com
To: Keith Scott

Subject: Your MSIX user initiated merge validation worklist item has been approved.

Hello Keith Scott,

Your request to merge the student records in MSIX has been approved:
Student Last Name: Tangirala
Worklist Item ID: 34945

This worklist item was created originally by the following user:
Keith Scott
keith.test3@msix.test.gov
(555) 555-1234 Ext. 56789

Please use the following link to access MSIX: http://msix.ed.gov.

If you have forgotten your login or password, please contact your appropriate User Administrator.
If you have questions regarding the contents of this email, please refer to the online help, user guide and other documentation available within MSIX. You may also contact the MSIX Support Team at msixsupport@deloitte.com.

This email account is not monitored.

Merge Notification

The email notification is sent to the user who initiated the merge to confirm that the Merge has been rejected. If the user made any comments on the worklist item, they would also be displayed in this e-mail.

From: Msix.Application@eds-orlando.com
To: Keith Scott

Subject: Your MSIX user initiated merge validation worklist item has been rejected.

Hello Keith Scott,

Your request to merge the student records in MSIX has been rejected:
Student Last Name: Tangirala
Worklist Item ID: 34945

This worklist item was created originally by the following user:
Keith Scott
keith.test3@msix.test.gov
(555) 555-1234 Ext. 56789

Please use the following link to access MSIX: http://msix.ed.gov.

If you have forgotten your login or password, please contact your appropriate User

Administrator.
If you have questions regarding the contents of this email, please refer to the online help, user guide and other documentation available within MSIX. You may also contact the MSIX Support Team at msixsupport@deloitte.com.

This email account is not monitored.

Splitting/Separating Student Records

A user can initiate a split when a record that has been incorrectly merged is encountered. The split separates a single merged record into new, separate student records. Once a Split has been initiated, MSIX automatically notifies a State, Regional, or District Data Administrator to review and validate the split. The figure below reflects the process workflow for User Initiated Split.

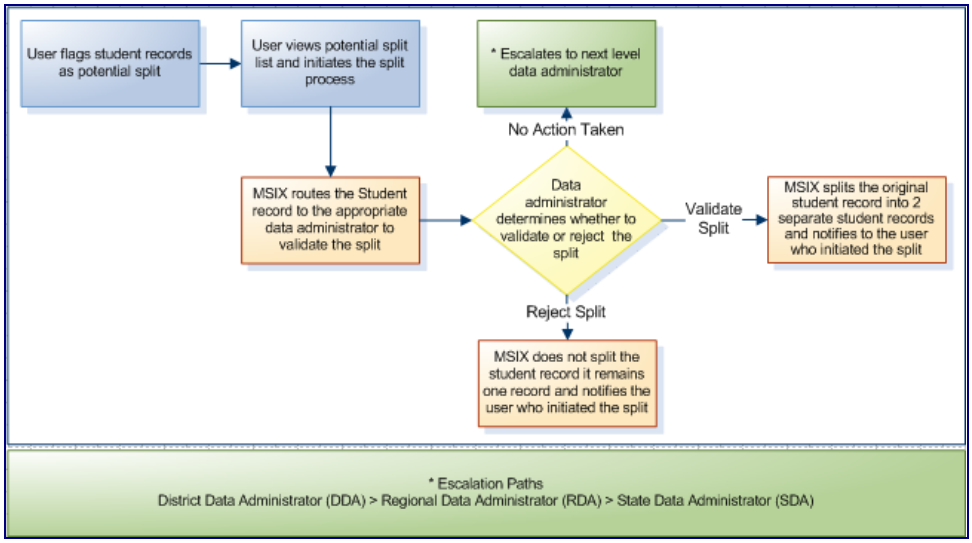


Figure 5.8: Workflow for Splitting Student Records

This sub-section will include the following topics:

- Submitting a User Initiated Split
- Canceling a User Initiated Merge
- Validating or Rejecting a User Initiated Split

Processing a User Initiated Split

The following tasks describe the process to initiate and validate or reject splitting student records.

Submitting a User Initiated Split

As a Primary User or Data Administrator, you can flag a student record for a potential split if it appears that one record actually belong to more than one student. A user determines that student records should be split when searching and displaying student records if he or she finds single records that are clearly for the different student. The user may then initiate a split. These splits are then routed by MSIX to the appropriate State, Regional, or District Data Administrators, based upon the open student enrollments in the student record.

Split Error Messages

MSIX displays an error message if you attempt to flag a student for split that has already been flagged by another user, or when you attempt to split a student record that has no additional historical record. You may see the following error messages:

Split Error Message	
Scenario	**Error Message**
Another User has Flagged the Student for Split	MSIX was unable to flag these records for merge/split. See section "Unsuccessful Split Flag Attempts" for further information. Click here for a list of Data Administrators associated with these students.
Student Record has no Additional Historical Record	In order to split a student record it has to have at least one historical record in MSIX.
Student Record is currently in a near match worklist (needs to be resolved prior to flagging for split).	MSIX was unable to flag these records for merge/split. See section "Unsuccessful Split Flag Attempts" for further information. Click here for a list of Data Administrators associated with these students.

Table 5.3: Split Error Messages

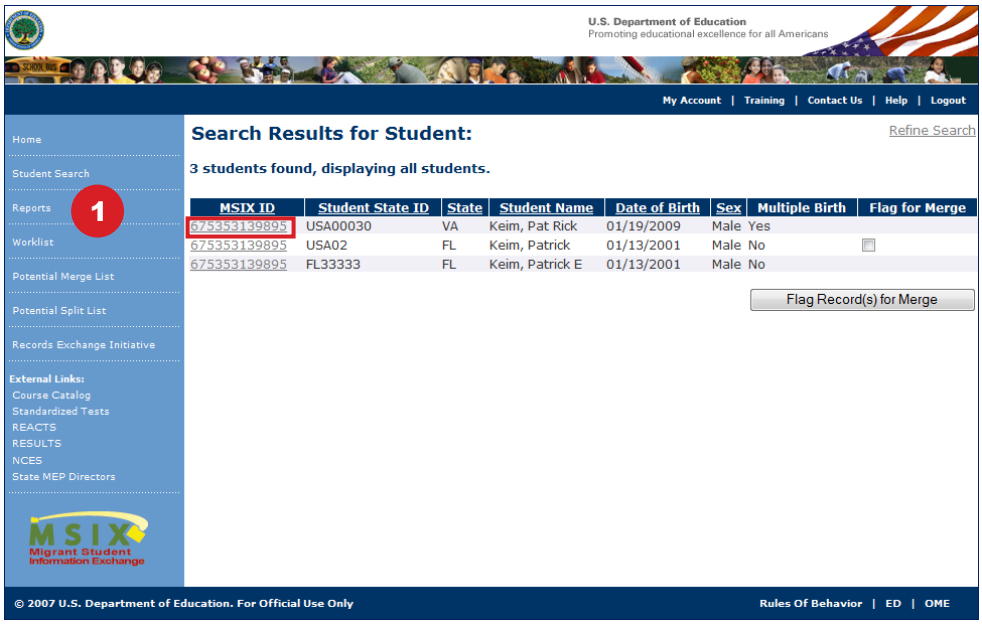
Steps to Initiate a Split

1. Locate the student record by using the Student Search process. Select an **Individual Student Record MSIX ID** link from the list on the search results page by clicking on the student's MSIX ID link.
2. On the "Consolidated Student Record View," click on the **Flag Record for Split** button for the student to be split.
3. Click on the **Potential Split List** link in the Left-side Navigation.
4. Select the record to split.
5. Click the **Process Split** button.
6. Indicate the Master Record. The "Master Record" is the one which keeps the existing MSIX ID; the other student record(s) are assigned new MSIX ID.

7. Click the **Split** button.
8. If applicable, enter a justification in the comment field. The comment field may contain up to 250 characters. To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information. The comments will be shared unedited and in their entirety with other MSIX users. Confirm the action by clicking **Split Record**.

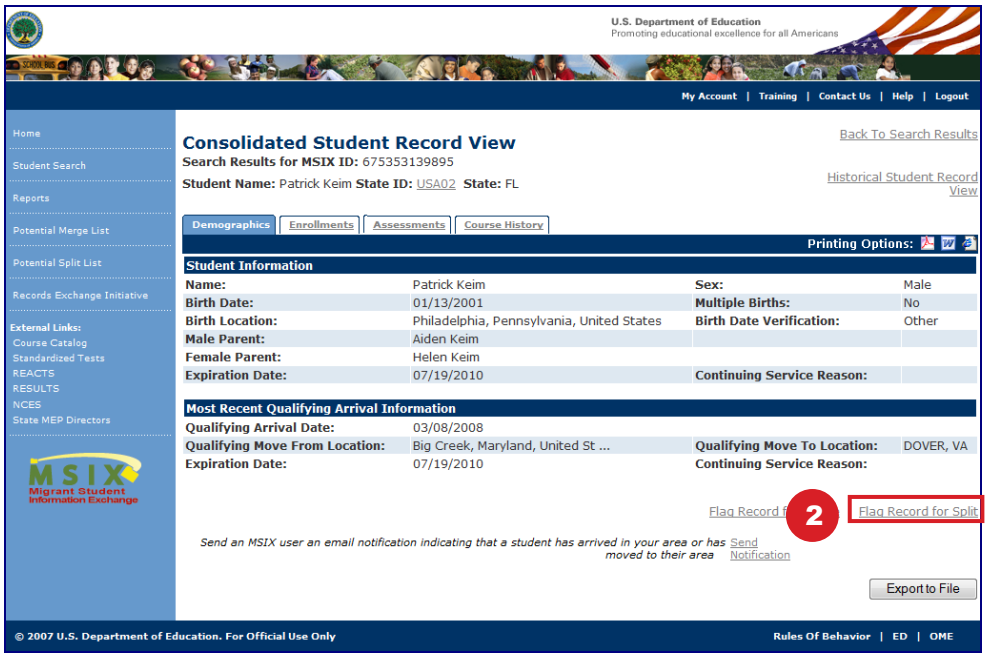
Access the Student Record

This page displays the results set returned from your search.



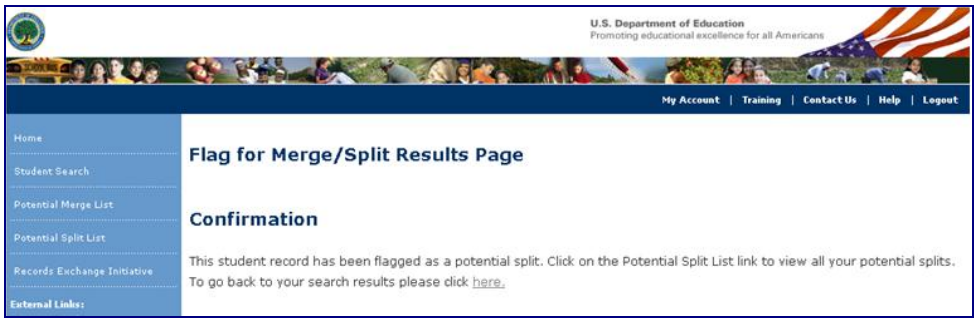
Flag Record for Split

On the "Consolidated Student Record View" page, you can flag a record to split.



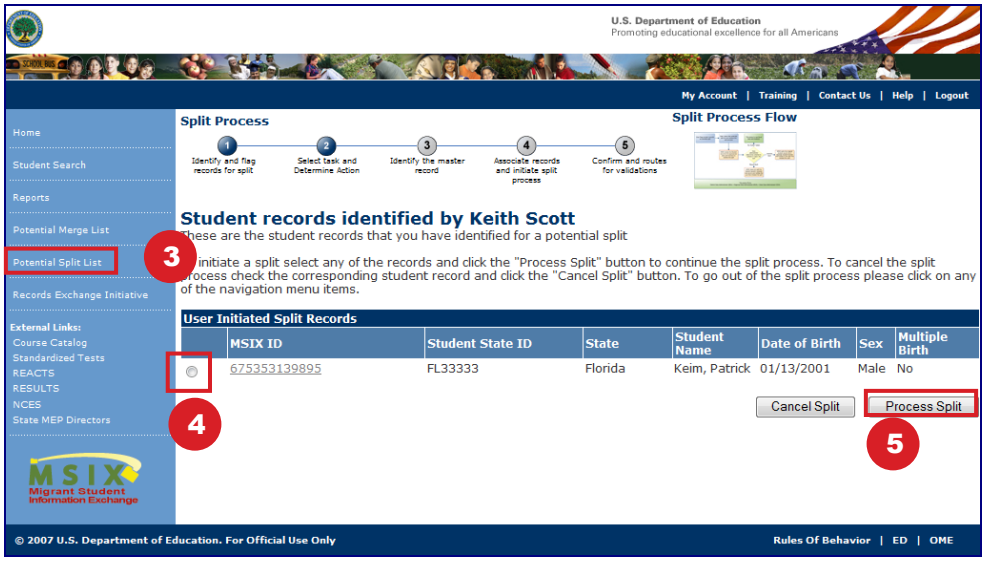
View the Split Confirmation

The "Confirmation" page below is the result if you initiated a request to split student records.



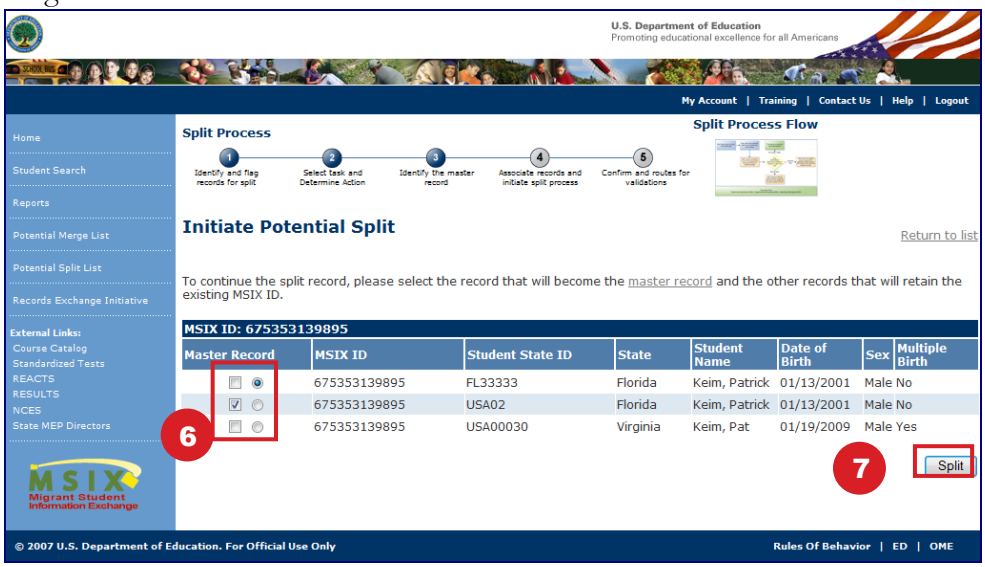
Access the Potential Split List and Process the Split

The Potential Split List navigates you to your list of student records for a potential split.



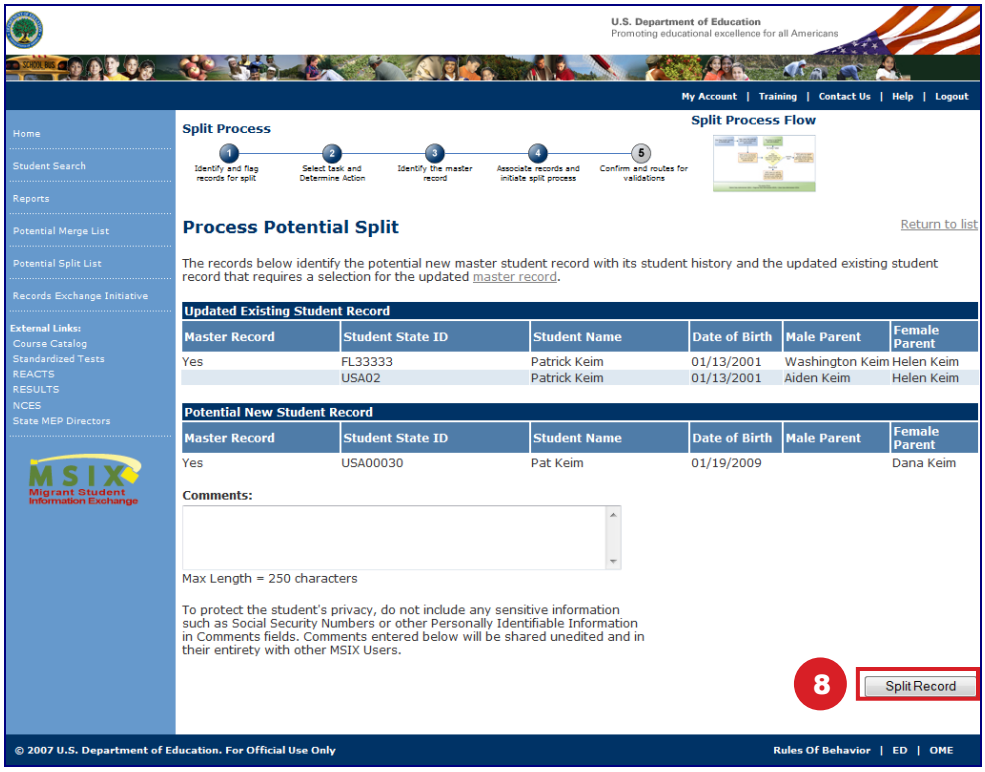
Initiate the Potential Split

On the "Initiate Potential Split" page, you select the "Master Record" – the MSIX record that keeps the existing MSIX ID. The other student record(s) are assigned new MSIX ID.



Process the Potential Split

After you have reviewed the records, you are ready to click the **Split Record** button.



Confirmation

The "Confirmation" page indicates that the split was initiated and is routed to a State, Regional, or District Data Administrator for review and validation.

Canceling a User Initiated Split

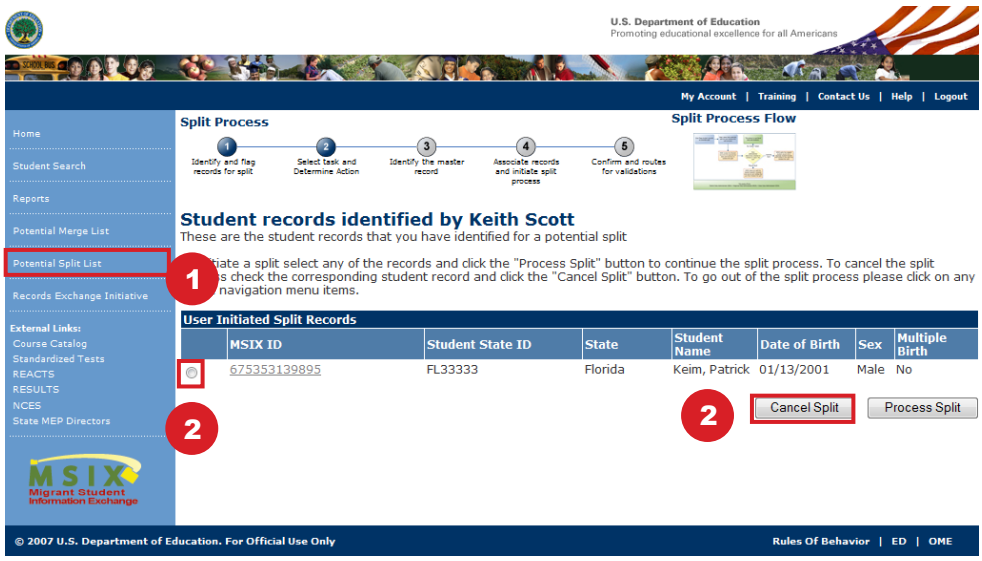
Primary Users and Data Administrators can cancel a request for a student record split, if needed. It is possible that you would learn more about the student records and determine the records should remain joined. You can cancel the split request to prevent them from going further into the Split Process.

Steps to Cancel a Split

1. Click on the **Potential Split List** link in the left navigation.
2. Select the students to remove from the Potential Split List. Then, click the **Cancel Split** button.

Access the Potential Split List and Cancel

The Potential Split List navigates you to your list of student records for a potential split.



Review the Potential Split as Cancelled

The "Confirmation" page verifies that the split was canceled.

Validating or Rejecting a User Initiated Split

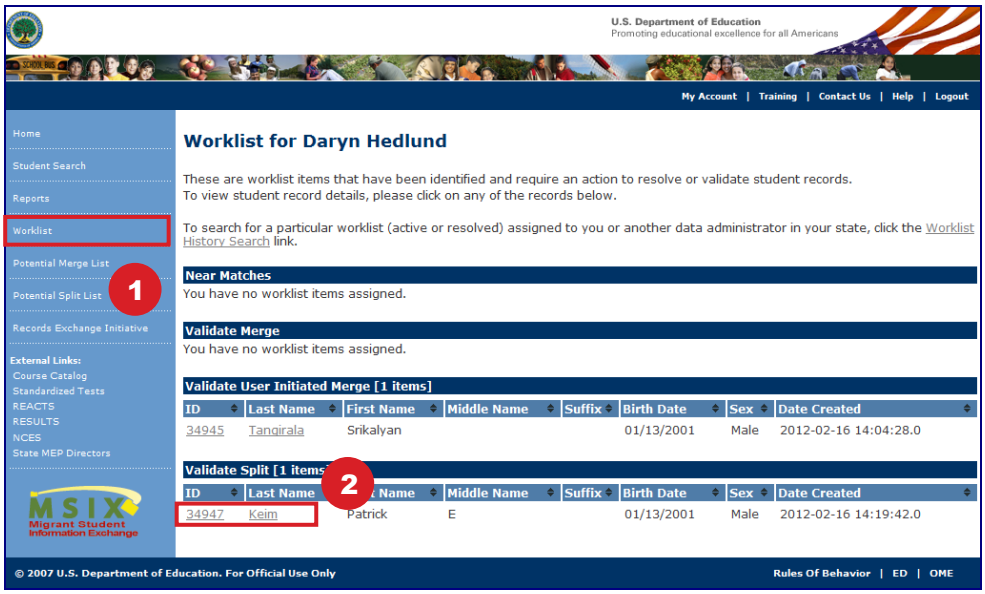
This allows you to validate or reject a student record split. When two student records are split, a new MSIX ID is created for the split record. Once a split has been validated by a State, Regional, or District Data Administrator, MSIX reflects that student record change, which is visible through the Student Search page.

Steps to Validate or Reject Split

1. Click the **Worklist** link on the Left-side Navigation, which will take you to the "Worklist" page.
2. On the Worklist page, select a **Student Record** link from under the "Validate Split" heading.
3. If applicable, enter a justification in the comment field. The comment field may contain up to 250 characters. To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information. The comments will be shared unedited and in their entirety with other MSIX users. Review the student records. If they are for different student, select **Validate Split**.
4. Review the records to determine if they should be split or remain as they are. If you decide to leave the records as they are, click the **Reject Split** button. If you decide to combine the records, click the **Validate Split** button.

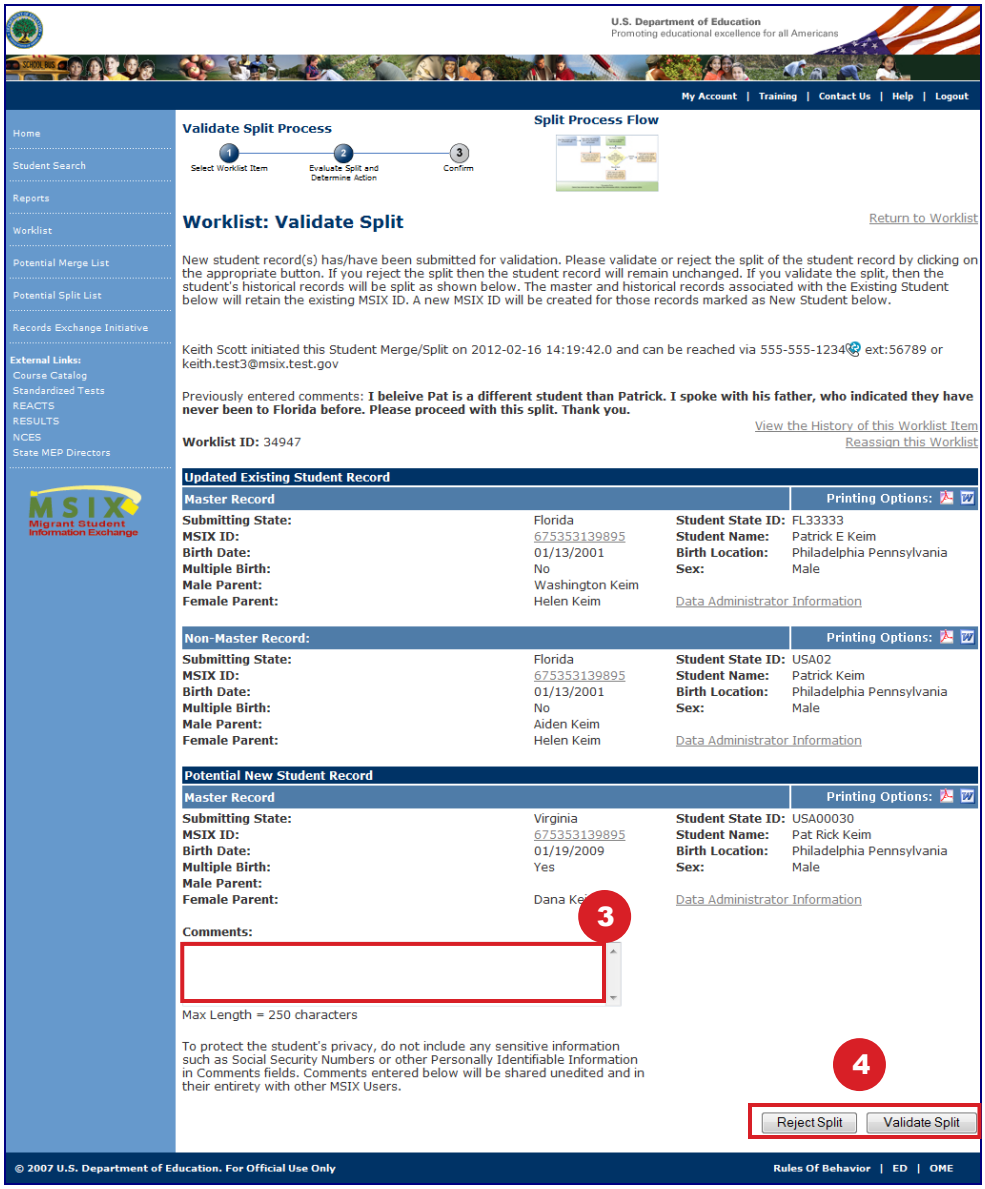
Access the and Select a Student Record

The Worklist displays the near match, validate merge and validate split tasks.



Validate or Reject the Split

The Validate Split allows you to reject or validate a record split.



BOTH A MERGE CONFIRMATION AND REJECT CONFIRMATION ARE SHOWN

Review Validate Split Confirmation

The sample "Confirmation" page below is the result if you select the **Validate Split** button.

Review Reject Split Confirmation

The sample "Confirmation" page below is the result if you select the **Reject Split** button.

Split Notification

The email notification is sent to the user who initiated the split to confirm that the Split has been accepted. If the user made any comments about the worklist item, they would also be displayed in this e-mail.

From: Msix.Application@eds-orlando.com
To: Keith Scott
Subject: Your MSIX user initiated split validation worklist item has been approved.

Hello Keith Scott,

Your request to split the student records in MSIX has been approved:
Student Last Name: Keim
Worklist Item ID: 34947

Please use the following link to access MSIX: http://msix.ed.gov.
If you have forgotten your login or password, please contact your appropriate User Administrator.
If you have questions regarding the contents of this email, please refer to the online help, user guide and other documentation available within MSIX. You may also contact the MSIX Support Team at msixsupport@deloitte.com. This email account is not monitored.

Figure 5.9: Sample Split Acceptance Email

Split Notification

The email notification is sent to the user who initiated the split to confirm that the Split has been rejected. If the user made any comments about the worklist item, they would also be displayed in this e-mail.

From: Msix.Application@eds-orlando.com
To: Keith Scott
Subject: Your MSIX user initiated split validation worklist item has been rejected.

Hello Keith Scott,

Your request to split the following student has been rejected:
Student Last Name: Keim
Worklist Item ID: 34947

Please use the following link to access MSIX: http://msix.ed.gov.

If you have forgotten your login or password, please contact your appropriate User Administrator.
If you have questions regarding the contents of this email, please refer to the online help, user guide and other documentation available within MSIX. You may also contact the MSIX Support Team at msixsupport@deloitte.com.
This email account is not monitored.

Figure 5.10: Sample Split Rejection Email

Escalating Merge and Split Requests

A user's request to merge or split student records is automatically escalated when no action has been taken on a worklist item within a specific time period. The figure below reflects the process workflow for a Near Match.

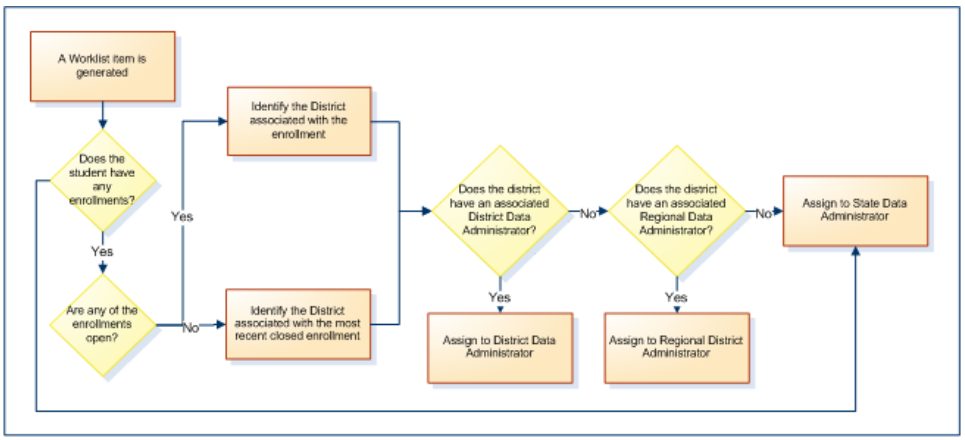


Figure 5.11: Workflow for Work Assignment and Escalation

Depending on your MSIX organizational structure, escalation occurs in a 1-, 2-, or 3-Tiered Workflow. The review process takes a total of 21 days where each reviewer has a limited review time. If the worklist item was "Validate" (Validate Near Match, Validate User-Initiated Merge, and Validate User-Initiated Split), it will automatically be approved after the specified timeframe has passed. Near Match worklist items will remain in the State Data Administrator's queue until action is taken to resolve the worklist. The State Data Administrator also has the ability to reassign the worklist to another data administrator.

- **3-Tiered Workflow** — States with 3 levels of review (district, region, and state)
- **2-Tiered Workflow** — States with 2 levels of review (district and state OR region and state)
- **Tiered Workflow** — States with 1 level of review (state only)

The table below illustrates the review period limits. For example, for a state with a Regional Administrator but no District Data Administrator (2-Tier), the Regional Administrator has 1 week and the State Data Administrator has 2 weeks for review.

Data Administrators in State	District Level	Regional Level	State Level	Total Escalation Timeframe
District, Regional & State	1 week	1 week	1 week	3 weeks
District & State	1 week		2 weeks	3 weeks
Regional & State		1 week	2 weeks	3 weeks
State			3 weeks	3 weeks

Table 5.4: Requests for Merge or Split Escalation Timeline

Reassigning Worklist Items

Users have the ability to reassign a worklist to a lower level data administrator in the user's state by clicking the Reassign Worklist link on the top right of the Worklist Details page. From there, you can select the users, by level, that you wish to reassign the worklist item to. However, Validate worklist items will still be automatically processed after 21 days, regardless of whether or not they have been reassigned to another Data Administrator.

The images below provide the steps to the reassign a worklist from a State Data Administrators point of view.

State Data Administrators can reassign worklists to Regional Data Administrators, District Data Administrators, or other State Data Administrators in their state. Regional Data Administrators can reassign worklist items to District Data Administrators or other State Data Administrators in their state. District Data Administrators can reassign worklist items to other District Data Administrators in their state.

This feature is also helpful when new Data Administrators join your team but have no worklists assigned to them. On the worklist page of the item you wish to resolve, click the Reassign Worklist link in the top right of the page. From there, you may reassign the worklist to the new data administrator by checking the box next to that Data Administrator's name, as long as the new user is at the same or lower tier (District, Regional, or State) as you.

Steps to Reassign a Worklist Item

1. Click the **Worklist** link on the Left-side Navigation menu, which will take you to the "Worklist" page.
2. On the "Worklist" page, select a **Worklist Item**.
3. Select **Reassign Worklist** link, which will take you to the "Reassign Worklist" page.

4. On the "Reassign Worklist" page, **uncheck the current users** assigned to the worklist and **expand the level** of data administrator you would like to assign the worklist to (optional).

5. On the "Reassign Worklist" page, **select the users** you wish to assign the worklist item to. You may select multiple users as long as they are at the same "level" of data administrator.

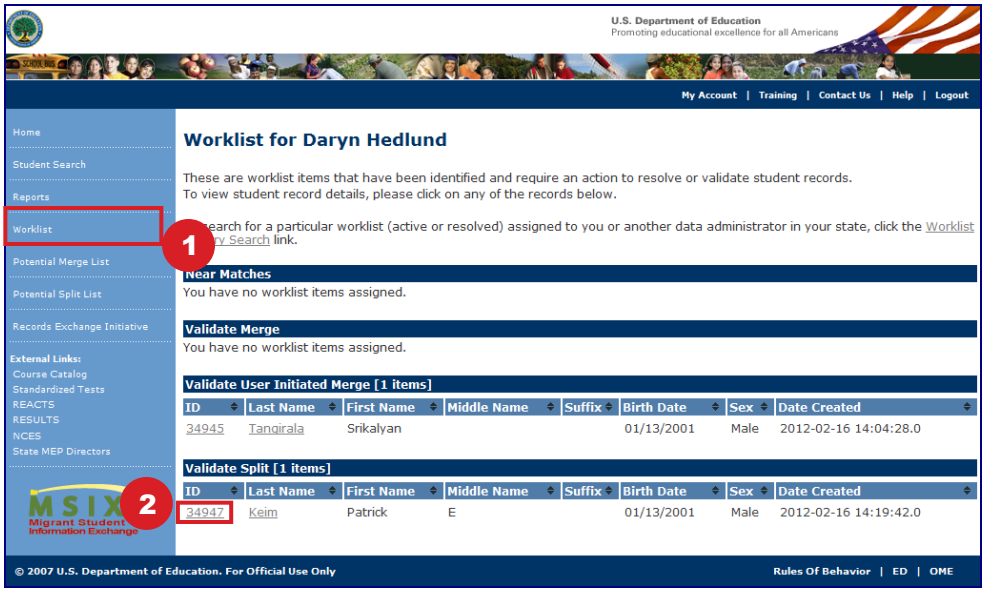
6. **Submit** the reassignment. You will be directed to the "Confirmation Page".

7. On the "Confirmation Page", review the changes you are making and select **Save**. You will be redirected to your "Worklist" page.

8. On your "Worklist" page, **verify** that the worklist item you just reassigned is no longer on your worklist.

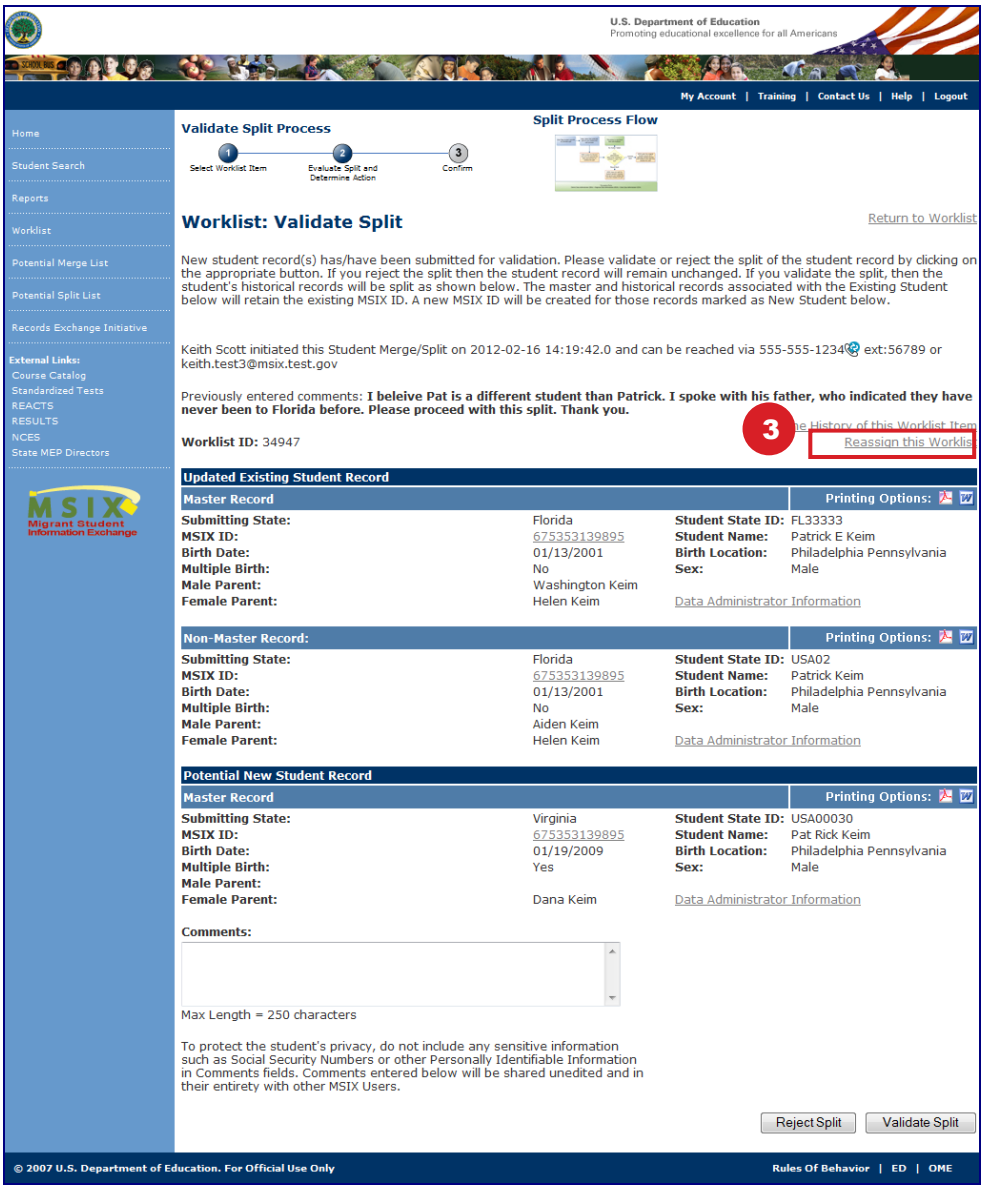
Access Worklist Item

The user accesses his/her worklist items from this page. Select a Worklist Item from your worklist.



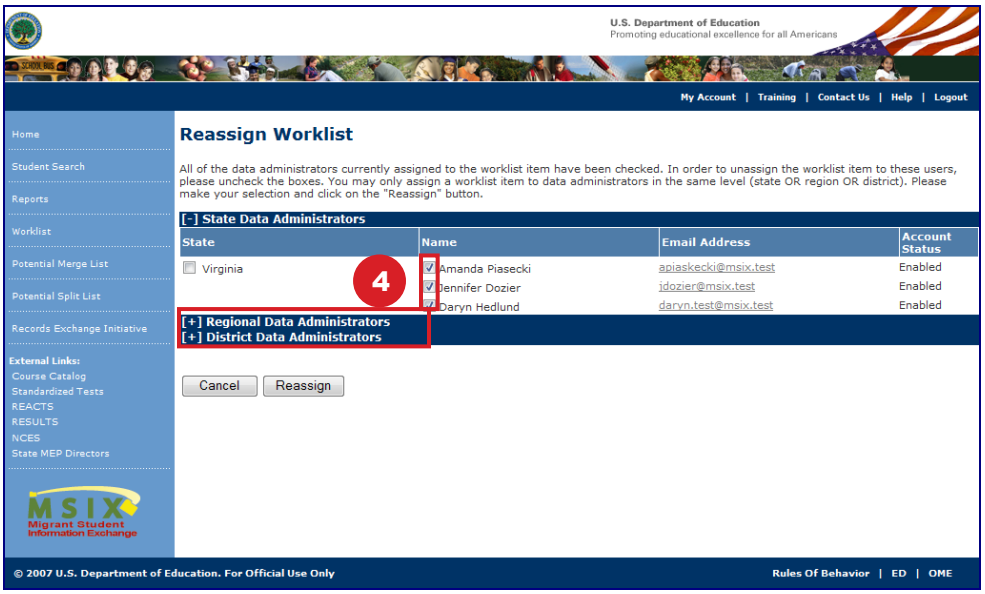
Access the Reassign Worklist Page

At the top right of your worklist page, click the "Reassign Worklist" link. This will navigate you to the Reassign Worklist page.



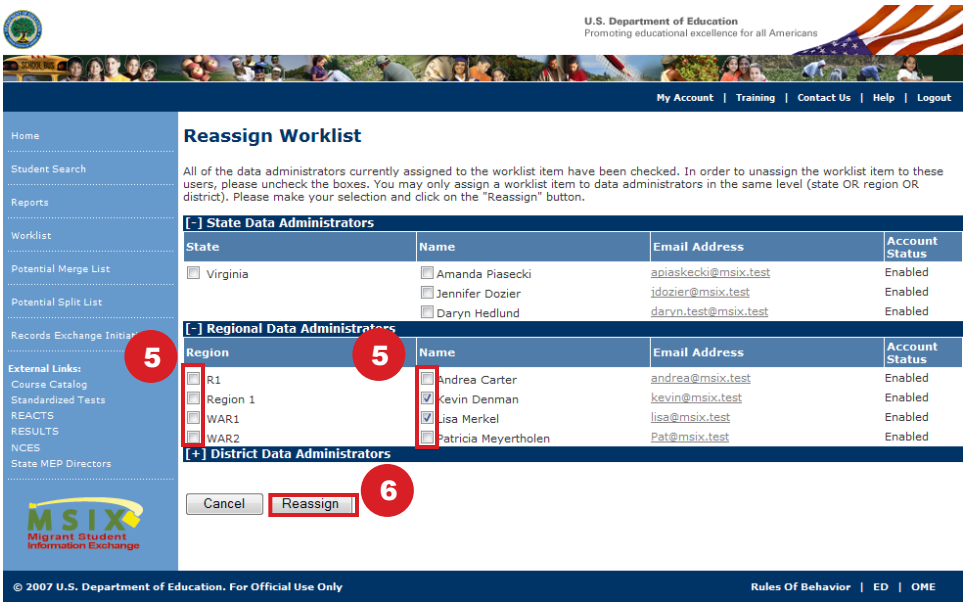
Un-assign Current Data Administrators

Uncheck the boxes to the current data administrators (unless you want to add additional data administrators in the same level to the worklist item). Expand the "level" of data administrator, which you would like to reassign the worklist to. Select one or multiple data administrators in one "level" to reassign the worklist item to.



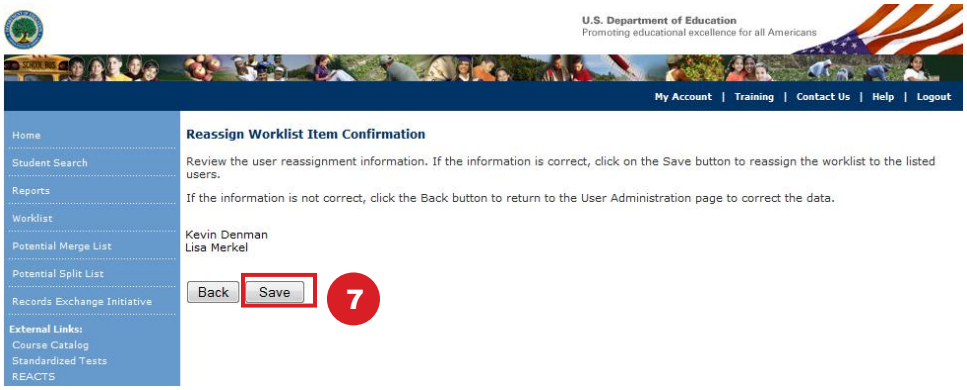
Select Users to Assign Worklist To

Reassign the worklist item to the appropriate data administrators by checking either the group box (to assign all users associate with the district/ region/ state selected) or the specific user you want to assign the worklist to. Then click the Reassign button to proceed with the reassignment.



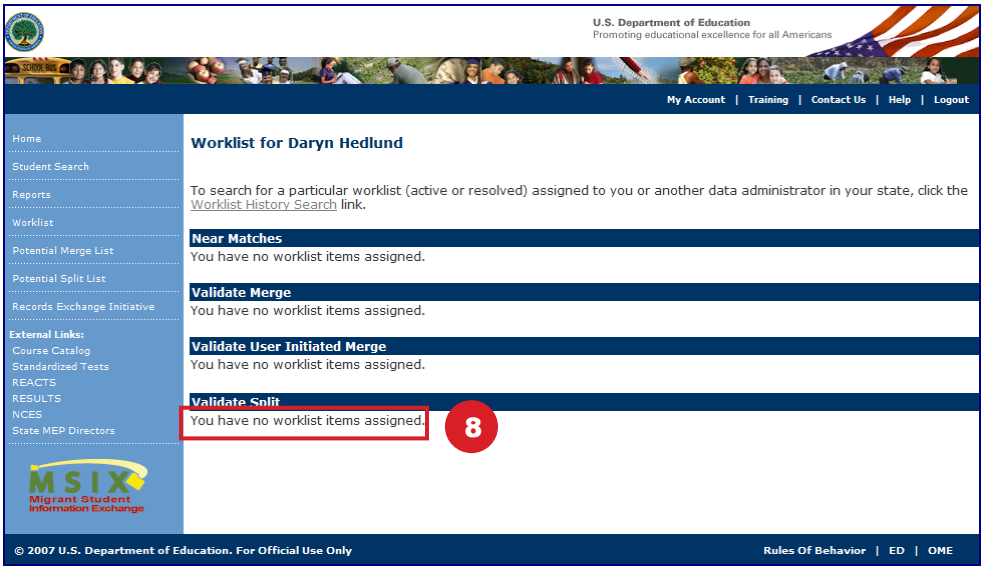
Confirm the Reassignment

Verify that the correct data administrators are going to be reassigned the worklist item and confirm the reassignment by clicking the Save button.



Verify the Worklist Item is Not in your Worklist

Upon clicking the Save button on the confirmation page, you will be navigated back to your Worklist page. If you unassigned the worklist from yourself in step 4, the worklist you reassigned should no longer show up in your worklist.



View Worklist History

Data Administrators can view current or historical worklist items assigned to themselves or other Data Administrators in their state through the Worklist History functionality. The Worklist History shows each step in the worklist resolution process, the users assigned to the worklist at each step, and the action taken at each step. Worklist actions captured by the history include reassignment, approval or rejection, or escalation to another user. The history also includes the comments of the user who took each action and the date the action was taken. Users can access the Worklist History through any current worklist item assigned to them, or through the Worklist History Search that is now available via a new link at the top of the Worklist homepage.

The Worklist History functionality provides more transparency into actions of users from different states for worklist items assigned to the user or other users in the same state. For example, if a user had an item in their worklist last week and noticed it was no longer on their worklist, he or she can now search by the worklist details to find out what action was taken by whom that resulted in its removal.

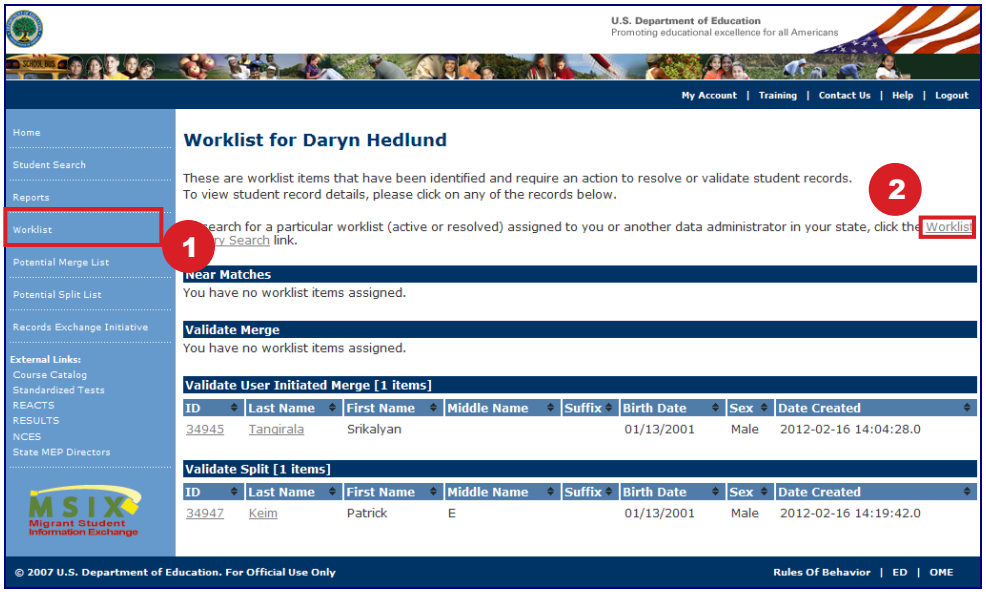
Data Administrators can view worklists assigned to themselves or other Data Administrators in their state for worklist items created after March 3, 2012. No worklist history will be available for worklists created before March 3, 2012.

Steps to View the History of a Worklist Item

1. Click the Worklist link on the Left-side Navigation menu, which will take you to the "Worklist" page.
2. On the "Worklist" page, select the "Worklist History Search" link.
3. Enter any search criteria in the Worklist History Search page.
4. Submit the search.
5. Select a **Worklist ID** from the "Worklist History Search Results" page.
6. On the "Worklist History" page, **expand** the steps of the Workflow to view the users assigned to the Worklist and the comments of the users who acted on the Worklist item.

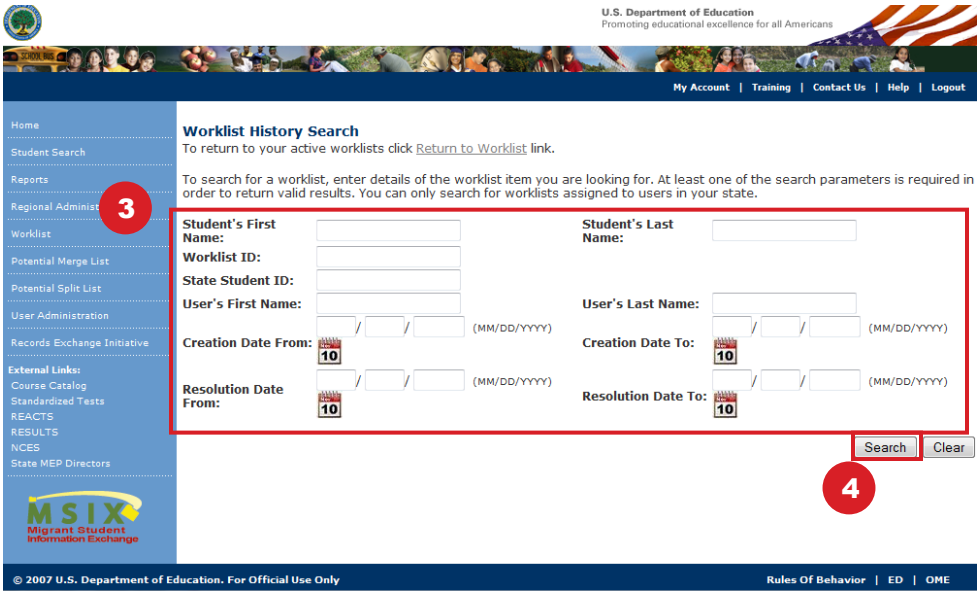
Access Worklist History Search Page

The user accesses his/her worklist items from this page. Select the Worklist History Search link at the top right of this page.



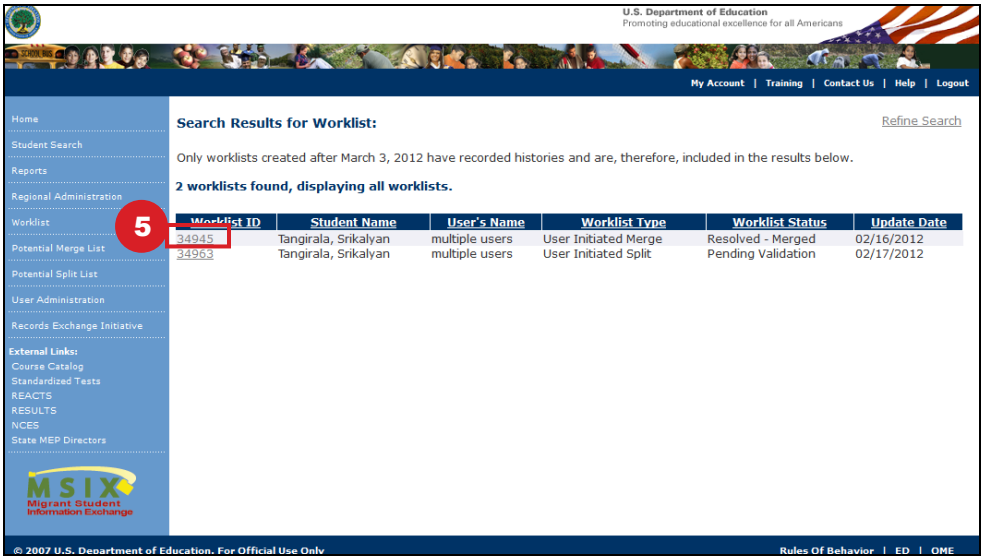
Search for a Worklist

Enter search criteria in any of the available search fields for Worklist Items associated with students with records in your state.

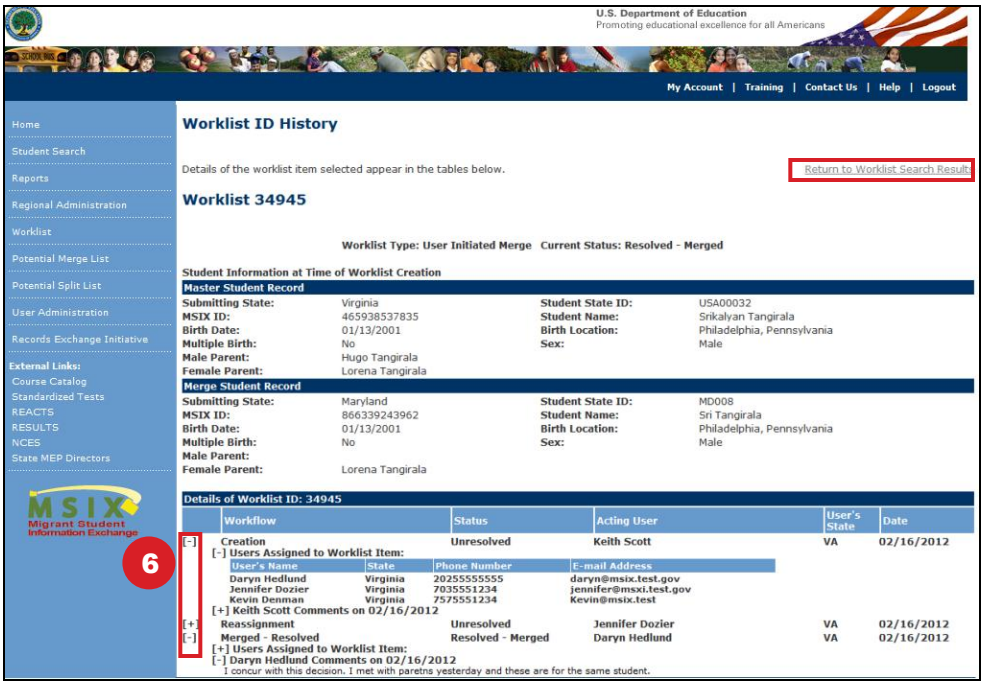


Select a Worklist Item from the Search Results Page

MSIX returns all worklist items associated with student records in the user's state that match the criteria entered in the previous step.



View the Historical Details of the Worklist Item & Expand Workflow
The details associated with the worklist item selected display on this page, including the type of worklist, current status of the worklist, basic demographic information of the student records at the time of the worklist creation, and the workflow of the worklist. The rows in the workflow table show each action taken on the worklist item, the user who made that action, the date of the action, and the resulting status of the worklist from that action. Data Administrators can expand the workflow rows to view the contact information of the users who were assigned the worklist at that step and any comments made by the acting user. Users can exit this page by clicking any of the links in the left navigation or they can return to the previous page by selecting the "Return to Worklist Search Results" link in the top right of the page.



Section 6: Regional Structure Administration

Each state has the option of using the Migrant Student Information Exchange (MSIX) regional structure functionality. If a state chooses to use regional structures, the state must set up its own named regions and tie each region to one or more districts. The effort to establish regions within a state is a one-time task. However, the regions will have to be updated if the state alters its regional model. The State Region Administrator is the only role that can create or update the Regional Administration. Office of Migrant Education (OME) users can view all state regional structures. This section includes the following topics:

- Creating a Region
- Updating a Region
- Disabling a Region
- Accessing the State Region Consolidated View

Creating a Region

Steps to Create a Region

1. Click the **Regional Administration** link on the Left-side Navigation menu, which will take you to the "Regional Structure Administration" page.
2. On the "Regional Structure Administration" page, select **Enable Regional Structure**.
3. Select **Enable Regional Structure for User Administration** and **Enable Regional Structure for Data Administration**. Then, click the **Next** button.
4. On the "Current Region" page, enter the **Region Name** and **Description** (optional).
5. On the "Current Region" page, you have **two choices for searching districts**: refine your search using one of the option fields, or enter NO search criteria and pull ALL districts. The option fields include: District Name, County, State District ID, and/or an NCES Code. Using either method, click the **Search** button.

6. The search results can be sorted by the column names by clicking on the column name.

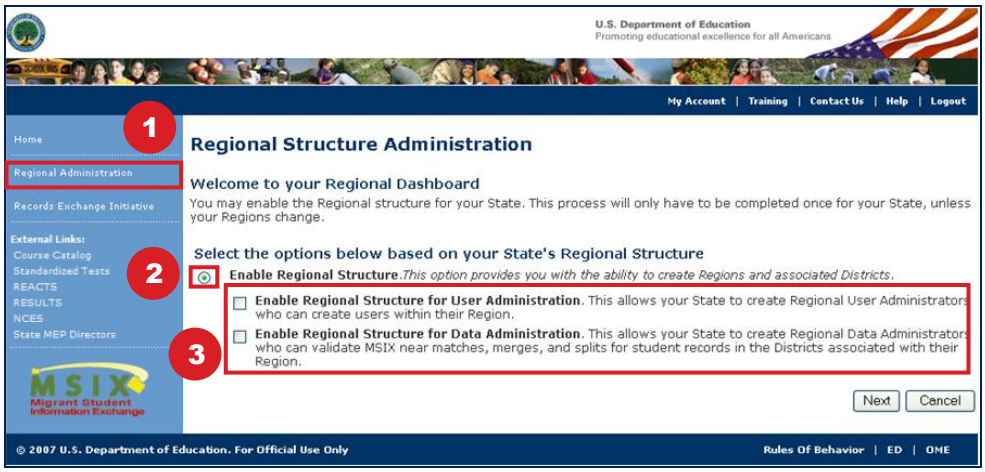
7. Select the **Districts** that will be part of the new region and click the **Add** button (repeat steps 5 and 6 until all associated districts are added).

8. Once all the districts have been added, click the **Save Region** button.

9. Click **Yes** to confirm.

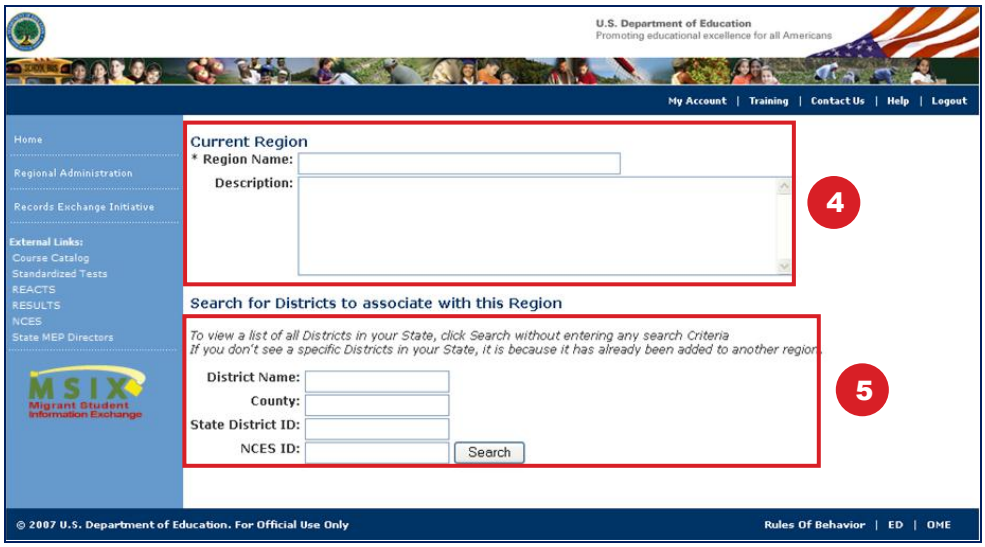
Set Up the Regional Structure

The state enables or disables the regional structure using this page. Check both **boxes** and **Next** to complete this task.



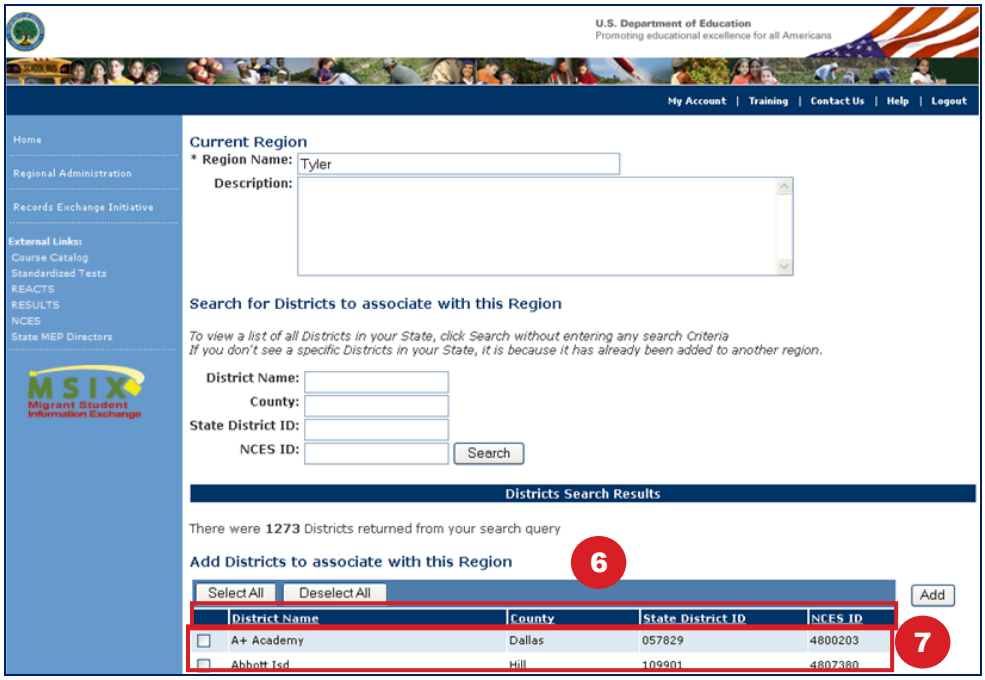
Create a New Region

Create a new region and associate one or more districts to it. Enter a **Region Name** and **search for districts** to associate with the region.



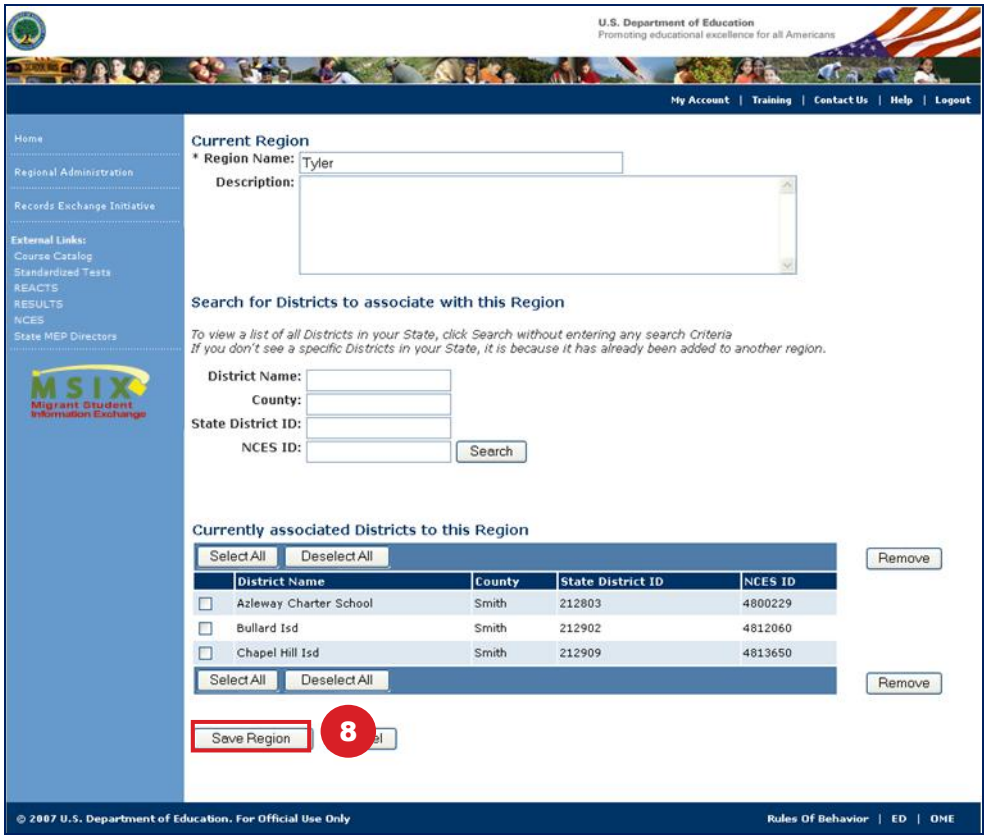
Associate Districts to a Region

Select the districts to add to the newly created region.



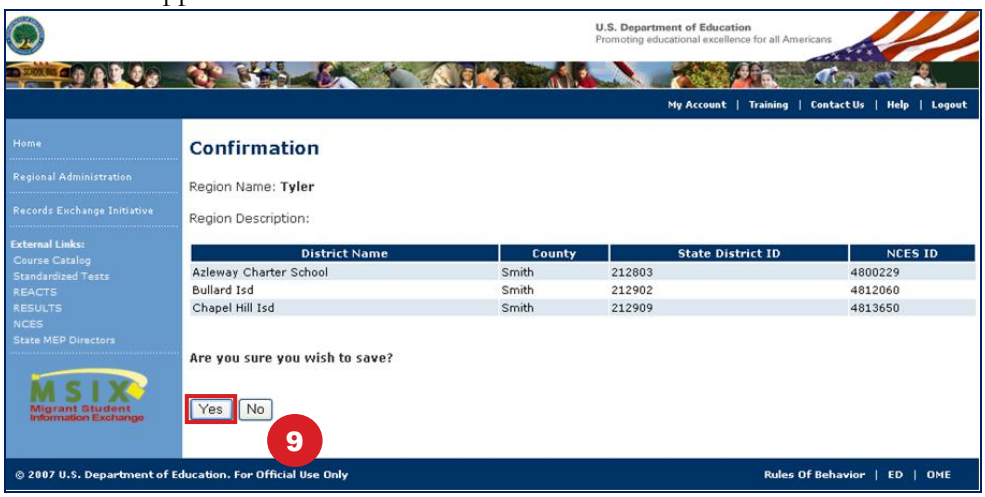
Save the Region

When all districts have been selected, the newly created region must be saved.



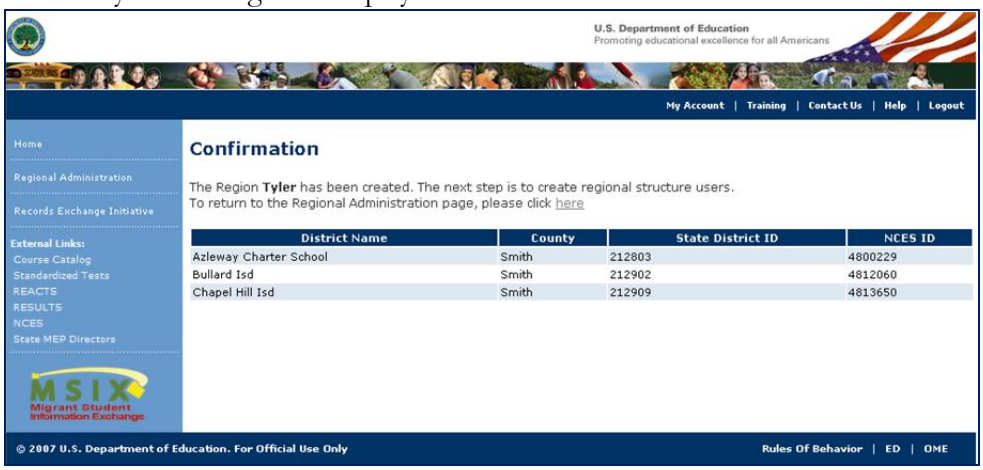
Review Confirmation of Your Action

Review the region that has just been created on the "Confirmation" page. Then, click **Yes** to approve it.



View the Confirmation

The newly created region is displayed.



Updating a Region

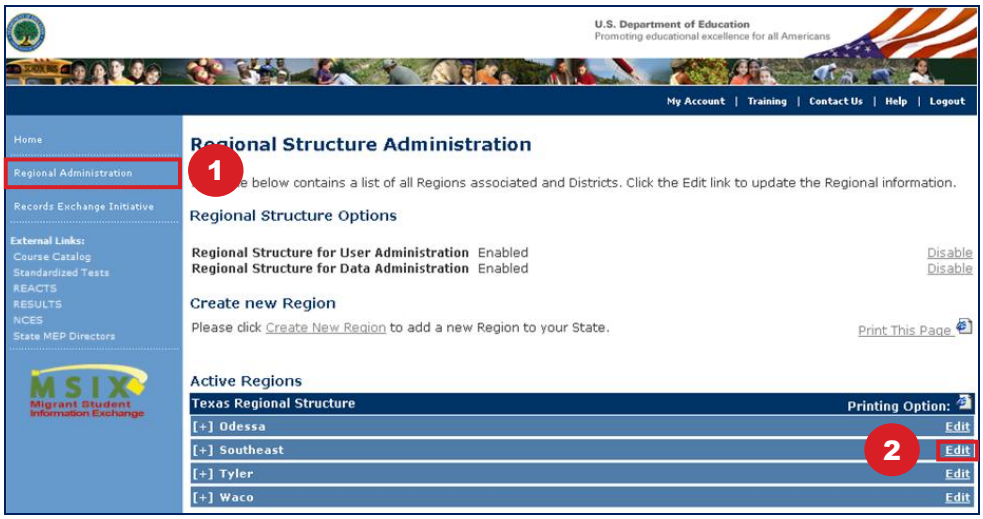
Even after a region has been initially established, you may need to assign new districts or revise the region name or description.

Steps to Update a Region

1. Click the **Regional Administration** link on the Left-side Navigation menu, which will take you to the "Regional Structure Administration" page.
2. On the "Regional Structure Administration" page, select the **Edit** link associated with a region that needs to be updated.
3. Update the **Region Name** and/or **Description** text, if needed.
4. To add a district, you have **two choices for searching districts**: refine your search using one of the option fields, or enter NO search criteria and pull ALL districts. The option fields include: District Name, County, State District ID, and/or an NCES Code. Using either method, click the **Search** button.
5. To remove a district, select the option by the **District** that you want to remove by clicking the option next to the District. Then, click the **Remove** button.
6. Once the Region update is completed, click the **Update Region** button.
7. Click the **Yes** button on the "Confirmation" page.

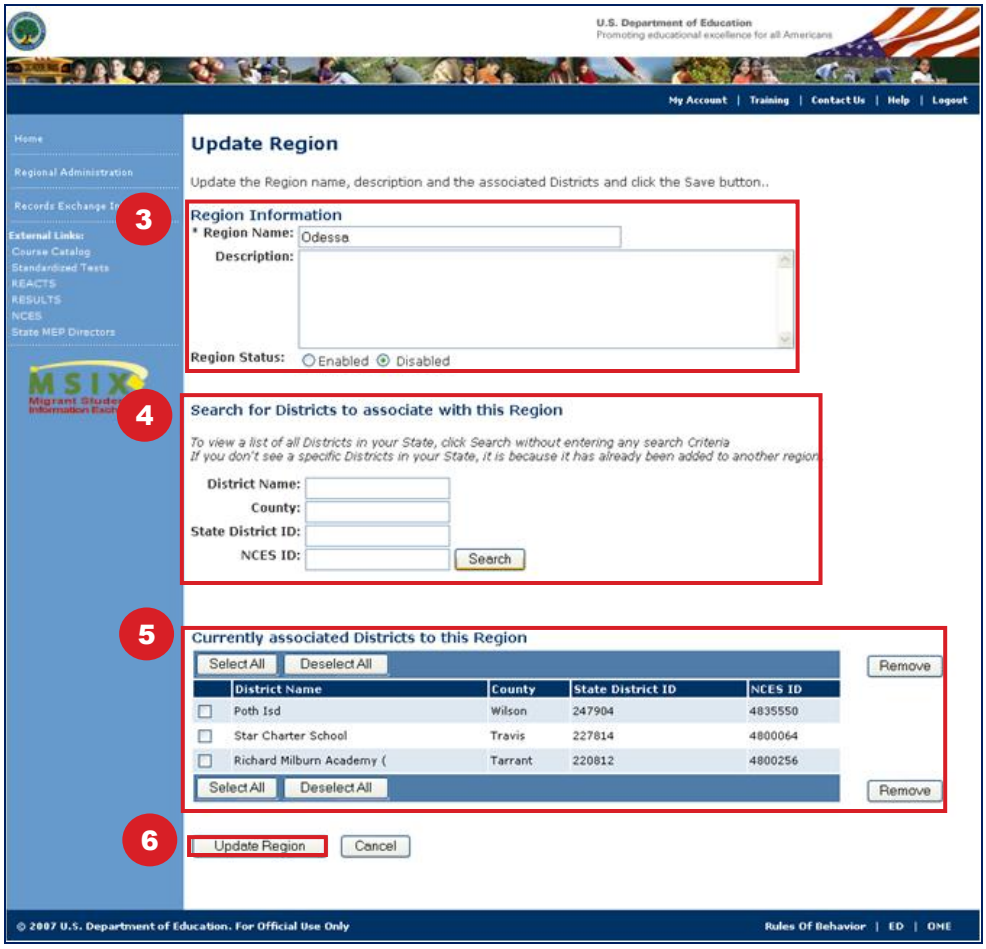
Access Regional Structure Administration

After the regions and districts have been updated in the regional structure, the page then displays all the regions and districts that have been added. The page becomes the regional structure landing or central page where you can update the regional structure options, link to the edit region page, enable regions, add new regions, and print each section.



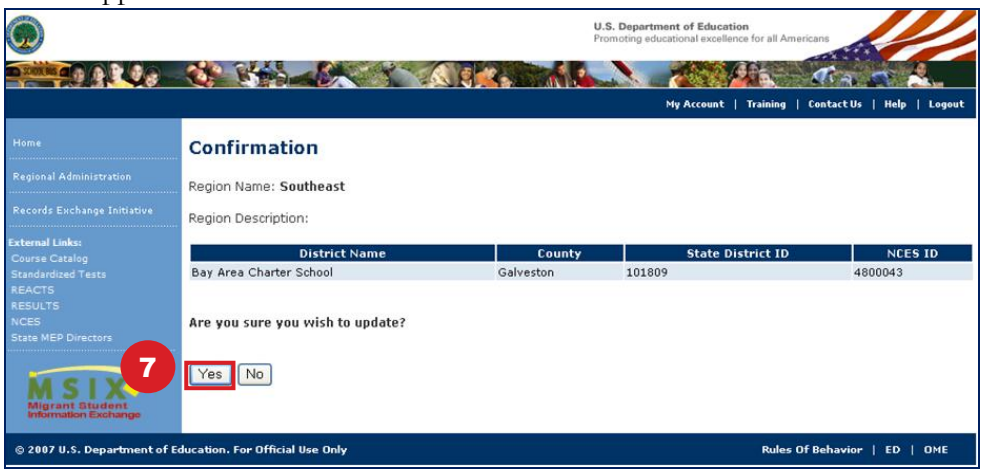
Update the Region

The region and district can be updated on this page in several areas.



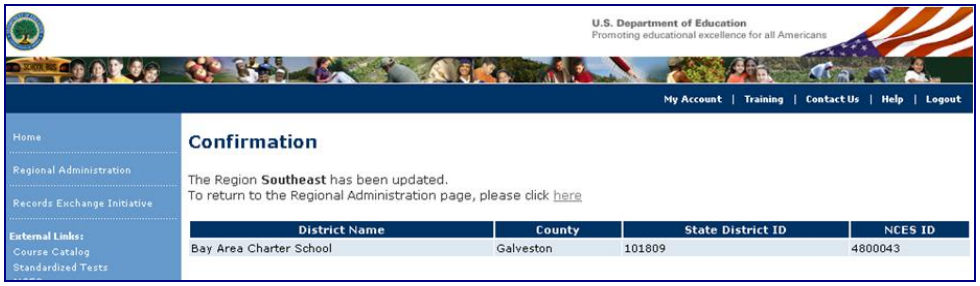
Review Confirmation of Your Action

Confirm the region has been created on the "Confirmation" page. Then, click **Yes** to approve it.



View the Confirmation

On the "Confirmation" page, the created region is displayed.



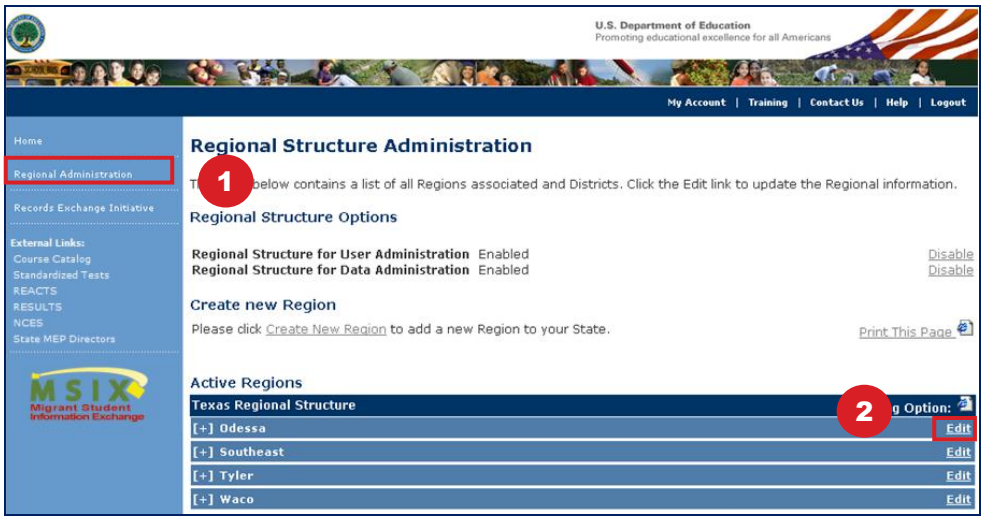
Disabling a Region

Steps to Disable a Region

1. Click the **Regional Administration** link on the Left-side Navigation menu, which will take you to the "Regional Structure Administration" page.
2. On the "Regional Structure Administration" page, select the **Edit** link next to the region that needs to be updated.
3. Select the **Disable Region** option in the Region Information section.
4. Once the Region update is completed, click the **Update Region** button.
5. Click the **Yes** button on the "Confirmation" page.

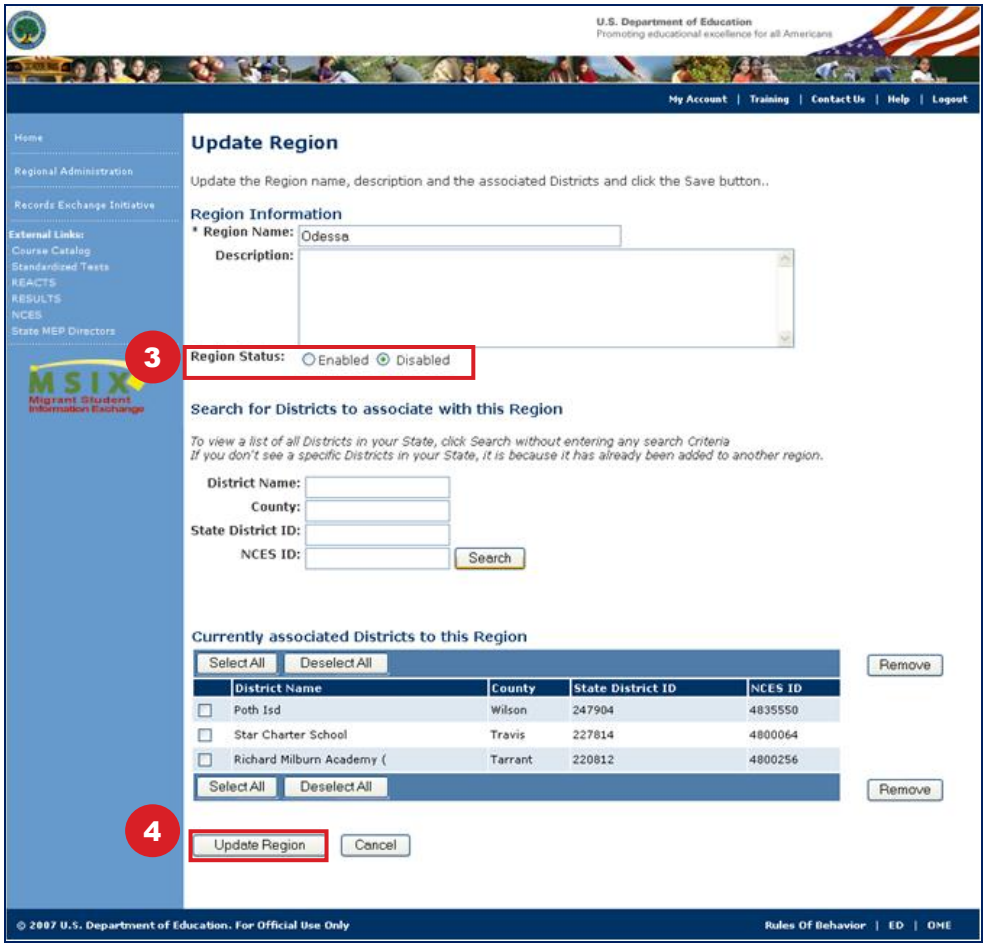
Access Regional Structure Administration

After the regions and districts have been updated in the regional structure, the page then displays all the regions and districts that have been added. The page becomes the regional structure landing page where you can update the regional structure options, link to the edit region page, enable regions, add new regions, and print each section.



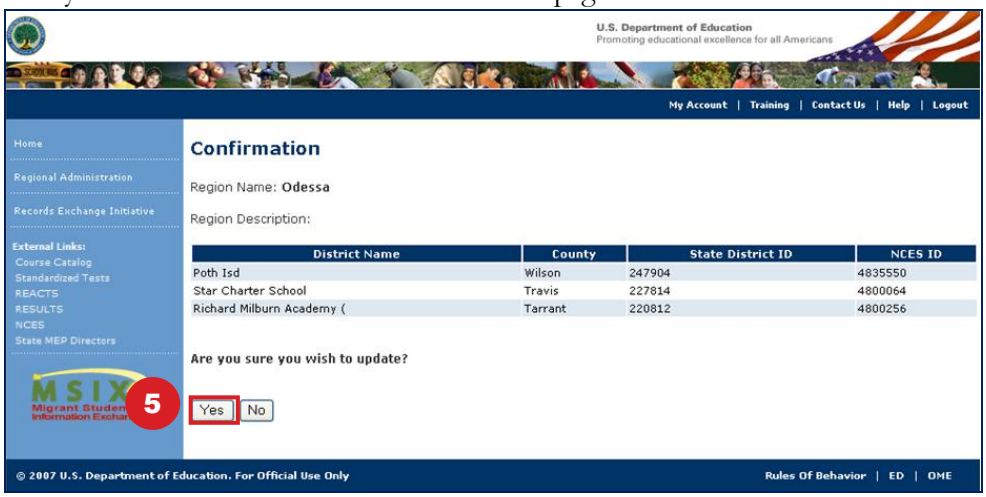
Disable the Region

The region and district can be updated on this page. Click "Disabled" to disable the region.



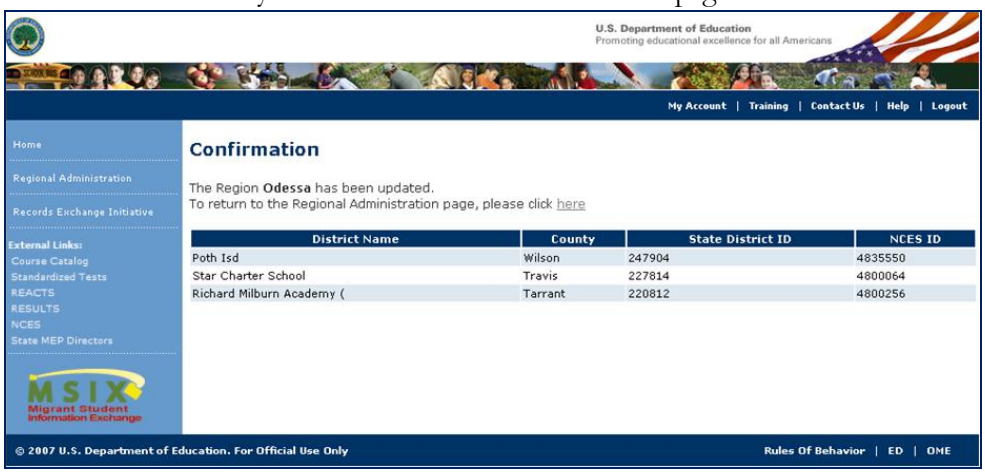
Confirm of Your Action

Verify the information on the "Confirmation" page and click **Yes.**



Review Confirmation of Your Action

Review the results of your action on the "Confirmation" page.



Accessing the State Region Consolidated View

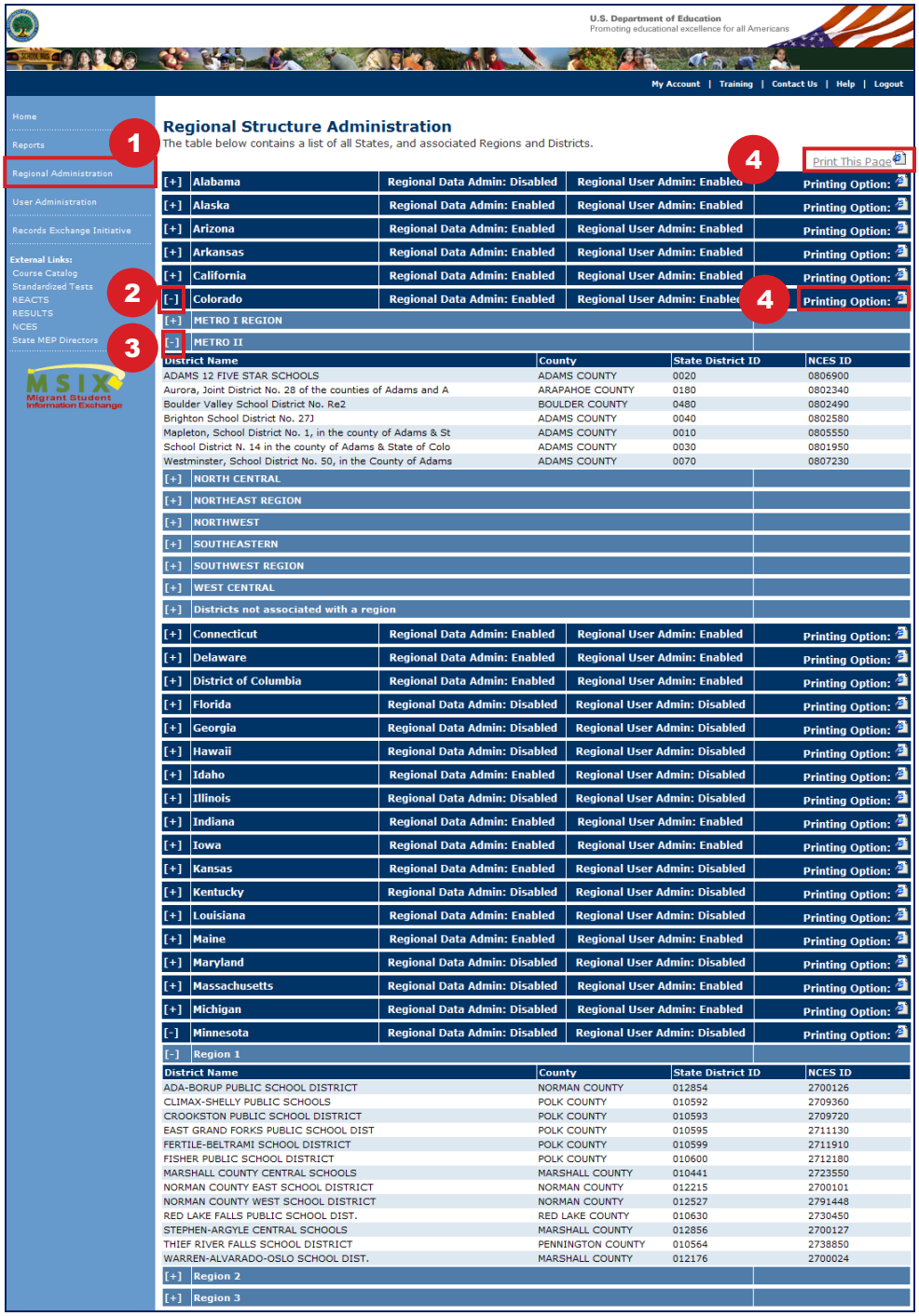
Both Government Administrators and OME User Administrators can view the State Regional Structure for all states. They cannot edit, add or disable the regional structure as State Regional Administrators can, but they can see if the data administration and user administration has been enabled or not for each state as well as view the breakdown for each state's regional structure by district. They can also view the districts not associated with any region by expanding the associated row for each state.

Steps to View the Region Consolidated View

1. Click the **Regional Administration** link on the Left-side Navigation.
2. Expand a State row to view the regional structure for the selected state.
3. Expand a Regional row to view the districts associated with the selected region.
4. Print the regional structure by selecting to print the ensure report or for selected states.

Access the State Region Consolidated View

This view can only be accessed by the Government Administrator and OME User Administrator role. From this page, the user can expand or collapse each state's structure and expand or collapse the regions to see the districts associated with each region. The user can print the entire page or the selected state they wish to save or print the regional structure for.


U.S. Department of Education
Promoting educational excellence for all Americans
My Account | Training | Contact Us | Help | Logout
Home
Reports
Regional Administration
User Administration
Records Exchange Initiative
External Links:
Course Catalog
Standardized Tests
REACTS
RESULTS
NCES
State MEP Directors
MSIX
Migrant Student Information Exchange
1
2
3
4
4
Regional Structure Administration
The table below contains a list of all States, and associated Regions and Districts.
Print This Page
[+] Alabama | Regional Data Admin: Disabled | Regional User Admin: Enabled | Printing Option:
[+] Alaska | Regional Data Admin: Enabled | Regional User Admin: Enabled | Printing Option:
[+] Arizona | Regional Data Admin: Enabled | Regional User Admin: Enabled | Printing Option:
[+] Arkansas | Regional Data Admin: Enabled | Regional User Admin: Enabled | Printing Option:
[+] California | Regional Data Admin: Enabled | Regional User Admin: Enabled | Printing Option:
[-] Colorado | Regional Data Admin: Enabled | Regional User Admin: Enabled | Printing Option:
[+] METRO I REGION
[-] METRO II
District Name | County | State District ID | NCES ID
ADAMS 12 FIVE STAR SCHOOLS | ADAMS COUNTY | 0020 | 0806900
Aurora, Joint District No. 28 of the counties of Adams and A | ARAPAHOE COUNTY | 0180 | 0802340
Boulder Valley School District No. Re2 | BOULDER COUNTY | 0480 | 0802490
Brighton School District No. 27J | ADAMS COUNTY | 0040 | 0802580
Mapleton, School District No. 1, in the county of Adams & St | ADAMS COUNTY | 0010 | 0805550
School District N. 14 in the county of Adams & State of Colo | ADAMS COUNTY | 0030 | 0801950
Westminster, School District No. 50, in the County of Adams | ADAMS COUNTY | 0070 | 0807230
[+] NORTH CENTRAL
[+] NORTHEAST REGION
[+] NORTHWEST
[+] SOUTHEASTERN
[+] SOUTHWEST REGION
[+] WEST CENTRAL
[+] Districts not associated with a region
[+] Connecticut | Regional Data Admin: Enabled | Regional User Admin: Enabled | Printing Option:
[+] Delaware | Regional Data Admin: Enabled | Regional User Admin: Enabled | Printing Option:
[+] District of Columbia | Regional Data Admin: Enabled | Regional User Admin: Enabled | Printing Option:
[+] Florida | Regional Data Admin: Disabled | Regional User Admin: Disabled | Printing Option:
[+] Georgia | Regional Data Admin: Disabled | Regional User Admin: Disabled | Printing Option:
[+] Hawaii | Regional Data Admin: Disabled | Regional User Admin: Disabled | Printing Option:
[+] Idaho | Regional Data Admin: Enabled | Regional User Admin: Disabled | Printing Option:
[+] Illinois | Regional Data Admin: Disabled | Regional User Admin: Disabled | Printing Option:
[+] Indiana | Regional Data Admin: Enabled | Regional User Admin: Enabled | Printing Option:
[+] Iowa | Regional Data Admin: Enabled | Regional User Admin: Enabled | Printing Option:
[+] Kansas | Regional Data Admin: Enabled | Regional User Admin: Disabled | Printing Option:
[+] Kentucky | Regional Data Admin: Disabled | Regional User Admin: Disabled | Printing Option:
[+] Louisiana | Regional Data Admin: Enabled | Regional User Admin: Disabled | Printing Option:
[+] Maine | Regional Data Admin: Enabled | Regional User Admin: Enabled | Printing Option:
[+] Maryland | Regional Data Admin: Disabled | Regional User Admin: Disabled | Printing Option:
[+] Massachusetts | Regional Data Admin: Disabled | Regional User Admin: Enabled | Printing Option:
[+] Michigan | Regional Data Admin: Disabled | Regional User Admin: Enabled | Printing Option:
[-] Minnesota | Regional Data Admin: Disabled | Regional User Admin: Disabled | Printing Option:
[-] Region 1
District Name | County | State District ID | NCES ID
ADA-BORUP PUBLIC SCHOOL DISTRICT | NORMAN COUNTY | 012854 | 2700126
CLIMAX-SHELLY PUBLIC SCHOOLS | POLK COUNTY | 010592 | 2709360
CROOKSTON PUBLIC SCHOOL DISTRICT | POLK COUNTY | 010593 | 2709720
EAST GRAND FORKS PUBLIC SCHOOL DIST | POLK COUNTY | 010595 | 2711130
FERTILE-BELTRAMI SCHOOL DISTRICT | POLK COUNTY | 010599 | 2711910
FISHER PUBLIC SCHOOL DISTRICT | POLK COUNTY | 010600 | 2712180
MARSHALL COUNTY CENTRAL SCHOOLS | MARSHALL COUNTY | 010441 | 2723550
NORMAN COUNTY EAST SCHOOL DISTRICT | NORMAN COUNTY | 012215 | 2700101
NORMAN COUNTY WEST SCHOOL DISTRICT | NORMAN COUNTY | 012527 | 2791448
RED LAKE FALLS PUBLIC SCHOOL DIST. | RED LAKE COUNTY | 010630 | 2730450
STEPHEN-ARGYLE CENTRAL SCHOOLS | MARSHALL COUNTY | 012856 | 2700127
THIEF RIVER FALLS SCHOOL DISTRICT | PENNINGTON COUNTY | 010564 | 2738850
WARREN-ALVARADO-OSLO SCHOOL DIST. | MARSHALL COUNTY | 012176 | 2700024
[+] Region 2
[+] Region 3

Section 7: User Administration

State User Administrators, Regional User Administrators, and OME User Administrators establish and maintain Migrant Student Information Exchange (MSIX) user accounts. The *MSIX User Administrator Guide for Managing User Accounts* provides further detail regarding tasks for this role and is available in Trainers' Corner on the MSIX website. This guide outlines the process that MSIX User Administrators must follow when administering accounts for authorized MSIX users. It also lays out policies, procedures, and guidelines for accessing MSIX to help User Administrators understand the User Management Lifecycle as it pertains to MSIX.

This section includes the following topics:

- Establishing User Accounts
- Updating User Accounts
- Resetting Passwords
- Disabling or Deactivating User Accounts

Establishing User Accounts

Establishing user accounts is the process that User Administrators follow to add users giving them access to MSIX. The Administrator must confirm that a user has completed an application for accessing MSIX. Further, they must confirm that the applicant's identity and their user role have been confirmed by a Verifying Authority, which can be the applicant's direct supervisor or an individual that is above the direct supervisor in an official reporting structure. For example, an applicant who is a teacher should submit the application to his/her principal for identity verification review, or an applicant who is a state MEP Administrator should submit to his/her MEP Director for identity verification. **Note**, the Help Desk does not reset passwords, create new users, deactivate, or disable existing users. These tasks belong to User Administrators.

User Administration Error Messages

MSIX displays an error message when validation rules have been violated. You are given the option to reenter input values and resubmit your request. Your request is not processed until all validation rules have been satisfied. Below are some examples of User Administration Search error messages:

User Administration Error Messages	
Scenario	**Error Message**
The Fields are Blank on the Page	**Error:** Please enter at least one search criteria.

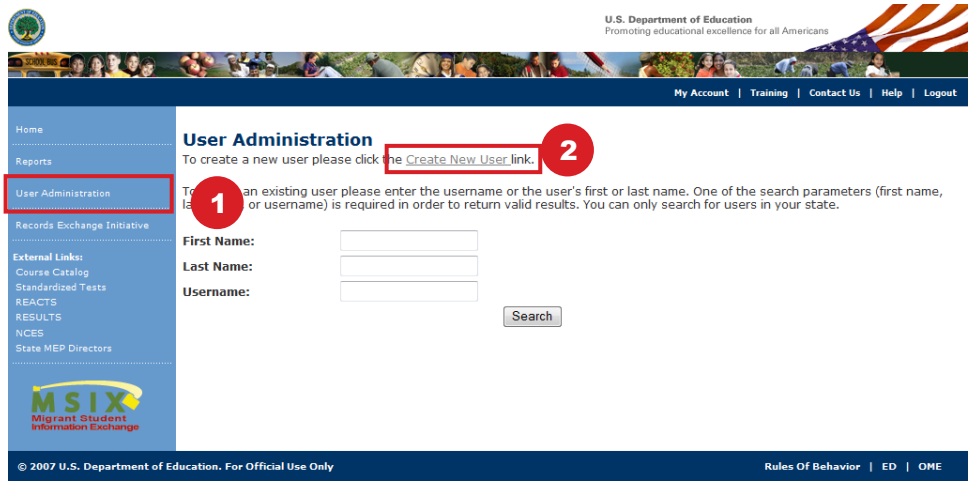
User Administration Error Messages	
Scenario	**Error Message**
Either the First or Last Name Field is Blank	**Error:** Please enter at least one character for the first and last name.
One or More of the Required Fields is Blank	**Error:** Please enter the required fields marked with an asterisk.

Steps to Create User Account

1. Click the **User Administration** link on the Left-side Navigation, which will take you the "User Administration" page.
2. Click the **Create New User** link in the main body section of the "User Administration" page.
3. On the "Create New User" page, enter at a minimum all required information to create a new user, including the **First Name**, **Last Name**, **Work Telephone Number**, **Work Email Address**, and **User Role**. Complete the other fields if you have the information available.
4. Click the **Next** button.
5. Click **Save.**

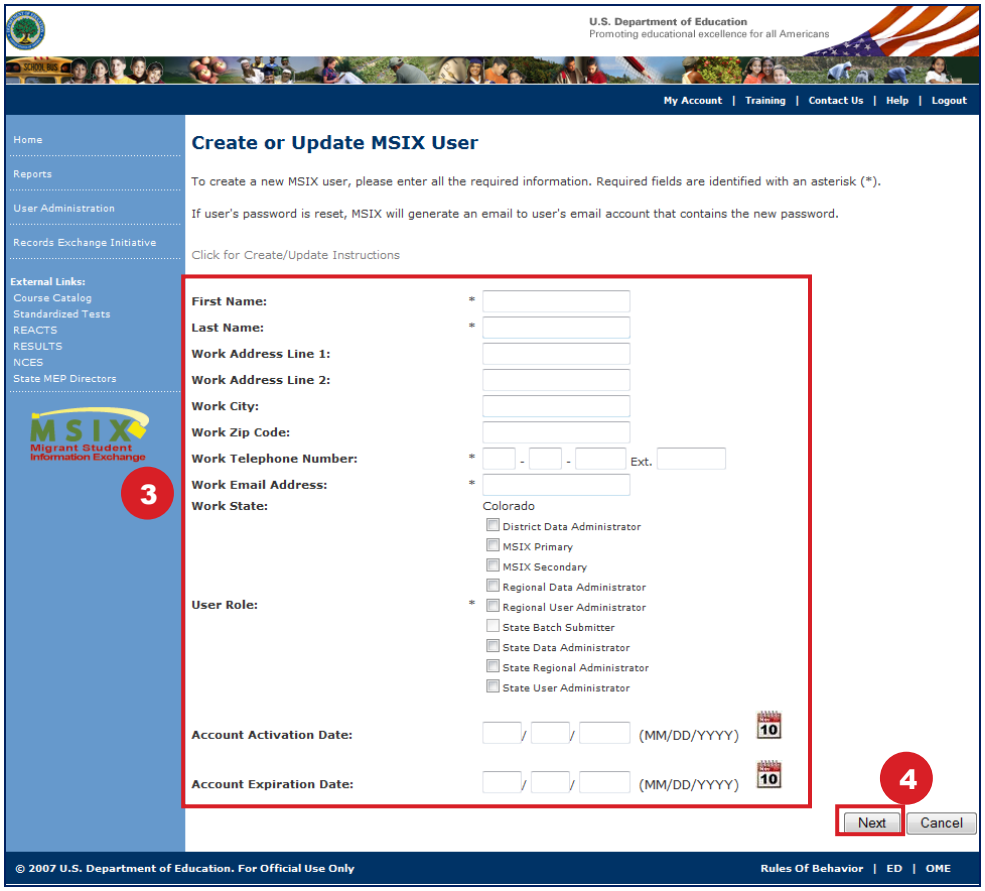
Access the "User Administration" Page

The User Administration page is the gateway that provides the User Administrator access to create a new user account.



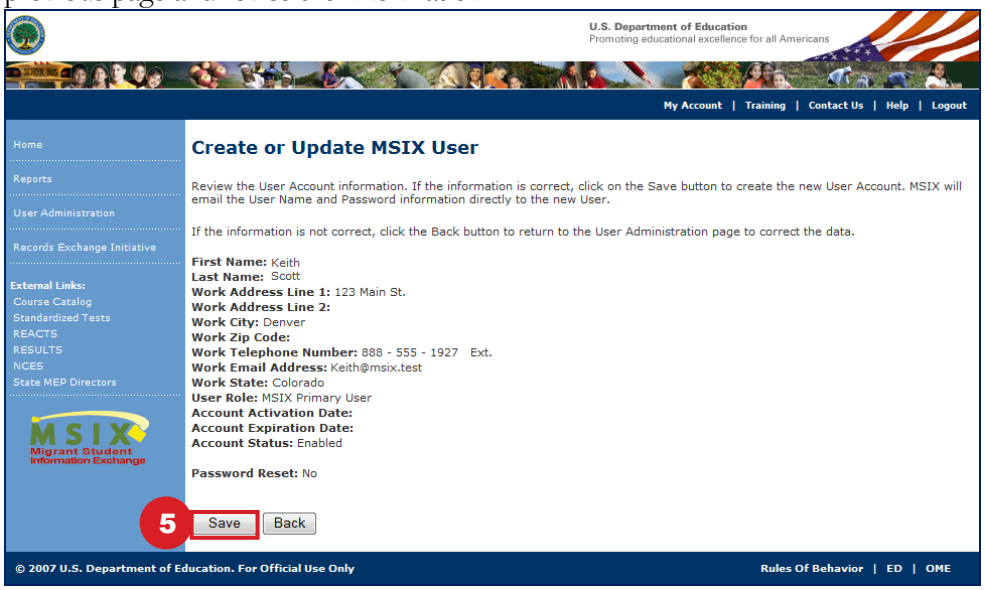
Enter New User Information

The "Create or Update MSIX User" page is used to create a user account.



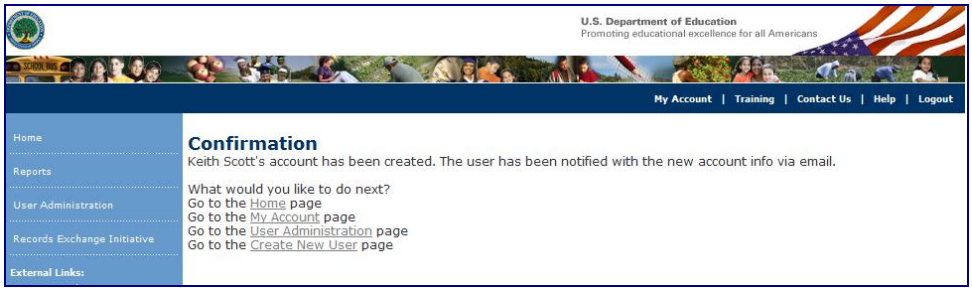
Confirm Your Action Before Saving

Determine that you have added all of the information accurately before you **Save** your action. If a change is needed, click the **Back** button to return to the previous page and revise the information.



Review Confirmation of Your Action

On the "Confirmation" page, MSIX confirms the action you just took.



Review New User Account Notification

Two email notifications are sent to the user when their new MSIX account has been created. One email provides the User Name and the other email provides the initial Password that must be changed with the initial log in. These emails will be similar to the sample shown in the "Logging In" section of this manual.

Updating User Accounts

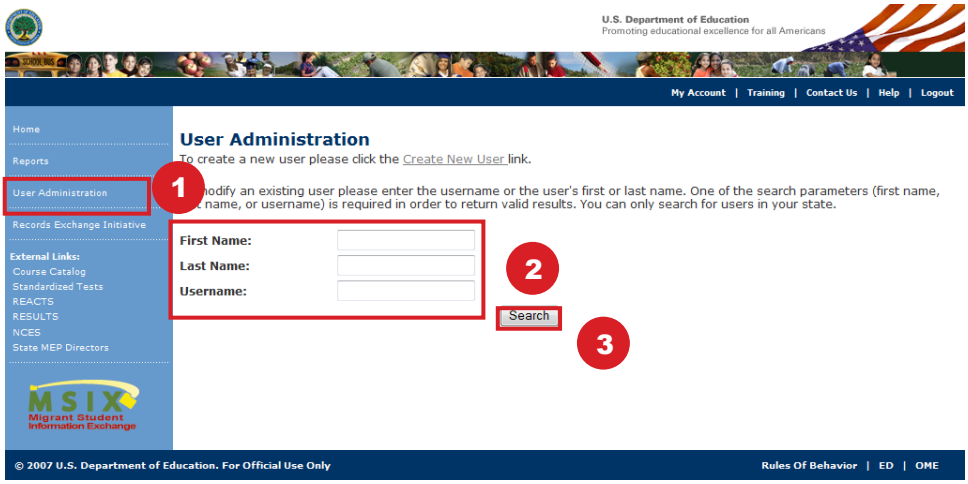
Updating a user account is the process that the User Administrators follow to make changes to a user account in MSIX.

Steps to Update a User Account

1. Click the **User Administration** link on the Left-side Navigation, which will take you the "User Administration" page.
2. Enter **First Name**, **Last Name**, or **User Name** into the text fields.
3. Click the **Search** button.
4. Search results can be **sorted by column names** by clicking the column name.
5. Click on a **User** link to select a user from the list of Search Results.
6. **Update** the necessary user information on the "Create or Update MSIX User" page.
7. Click the **Next** button.
8. Click **Save** on the "Confirmation" page.

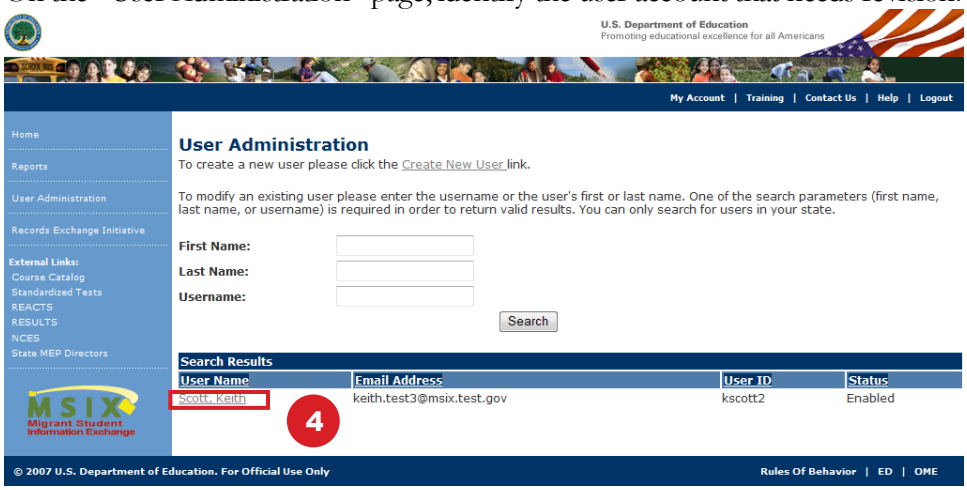
Access the "User Administration" Page

The "User Administration" page is the gateway that provides the Administrator access to modify an existing user account.



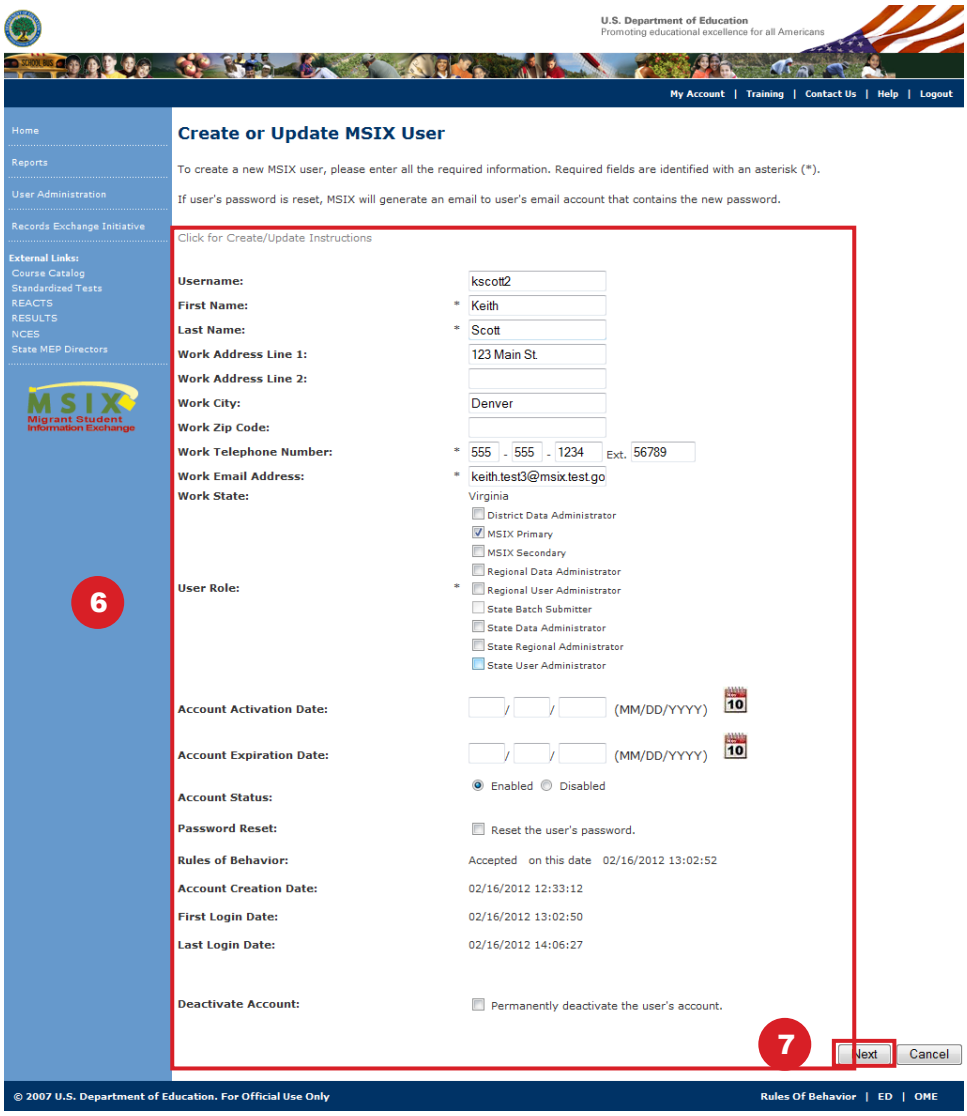
Select the User Account to Update

On the "User Administration" page, identify the user account that needs revision.



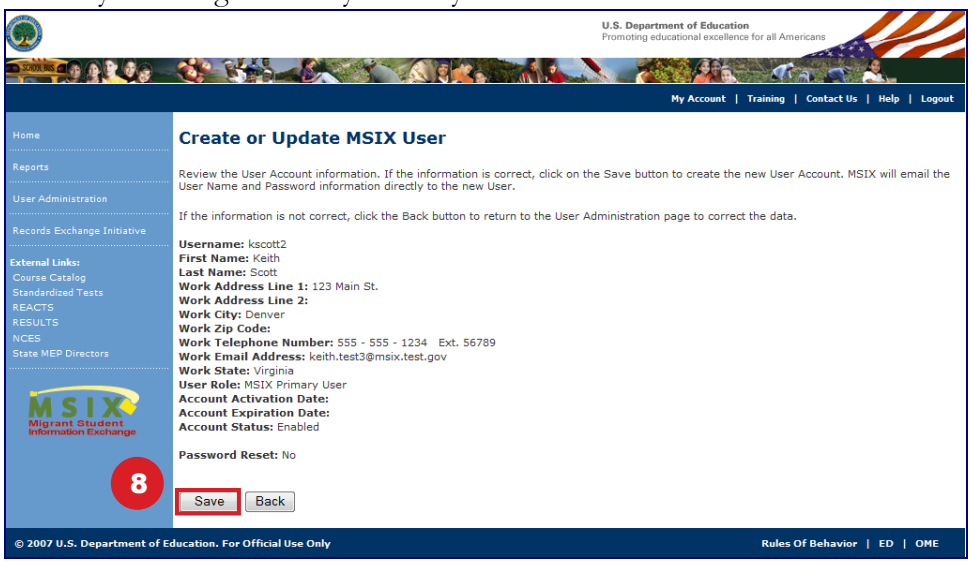
Update MSIX User

Make the necessary changes to the account.



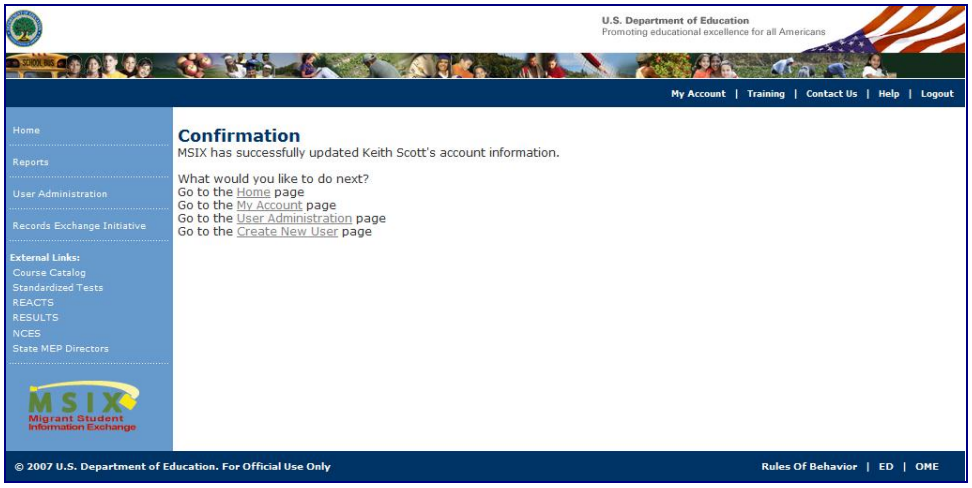
Confirm Your Action

Review your changes before you save your action.



Review the Confirmation of Your Action

The "Confirmation" page displays a message that your request has been updated.



If a User Administrator changes, removes or adds an activation date to a user's account, MSIX will send an e-mail notification to both the user and the User Administrator with the new activation date.

Resetting Passwords

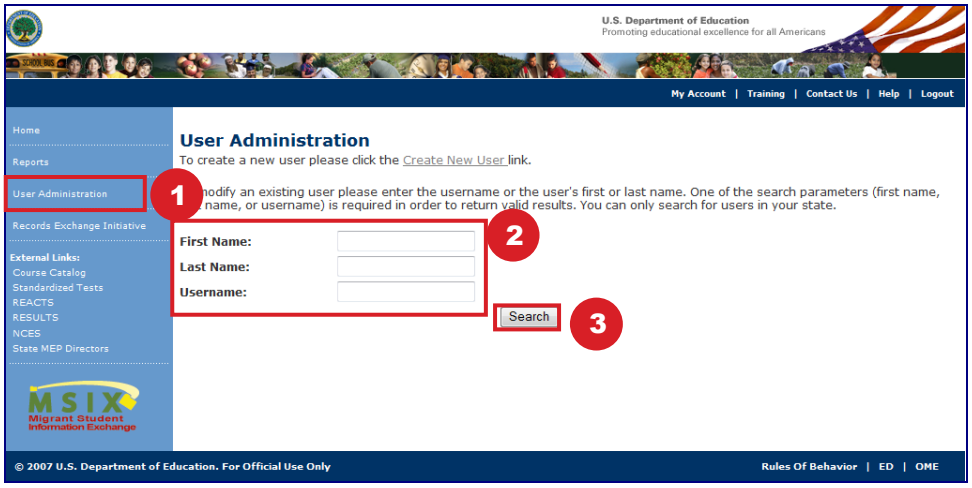
The Reset Password feature allows User Administrators to reset a user's password when the user cannot do it. A user can request that their password is reset in the My Account feature. This may occur if for some reason they want a different password. However, a User Administrator needs to reset a user's password in three situations: (1) the user is locked out of their account because they tried three times to access it, but failed on all three attempts, (2) the user forgot their password, or (3) if 90 days have gone since the user last used their Password and it expired. ***Note***, the Help Desk does not reset passwords, create new users, deactivate, or disable existing users. These tasks belong to User Administrators.

Steps to Reset a Password

1. Click the **User Administration** link on the Left-side Navigation, which will take you the "User Administration" page.
2. Enter **First Name**, **Last Name**, or **User Name** into the text fields.
3. Click the **Search** button.
4. Click on a **User** link to select a user from the list of Search Results.
5. Check the **Password Reset** checkbox.
6. Click the **Next** button.
7. Click **Save** on the "Confirmation" page. MSIX generates an email notification to the user containing the new password information. This email will be similar to the sample shown in the "Logging In" section of this manual.

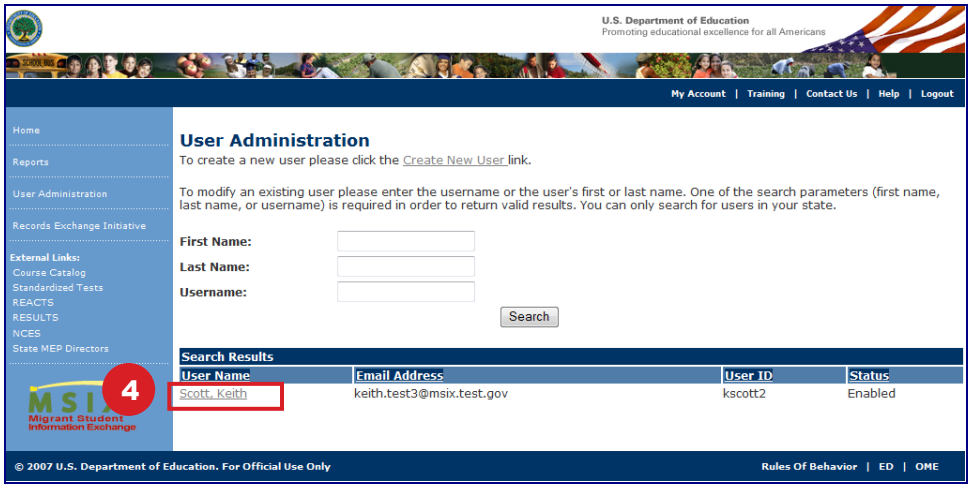
Access the "User Administration" Page

The "User Administration" page that provides the Administrator access to reset an existing user's Password.



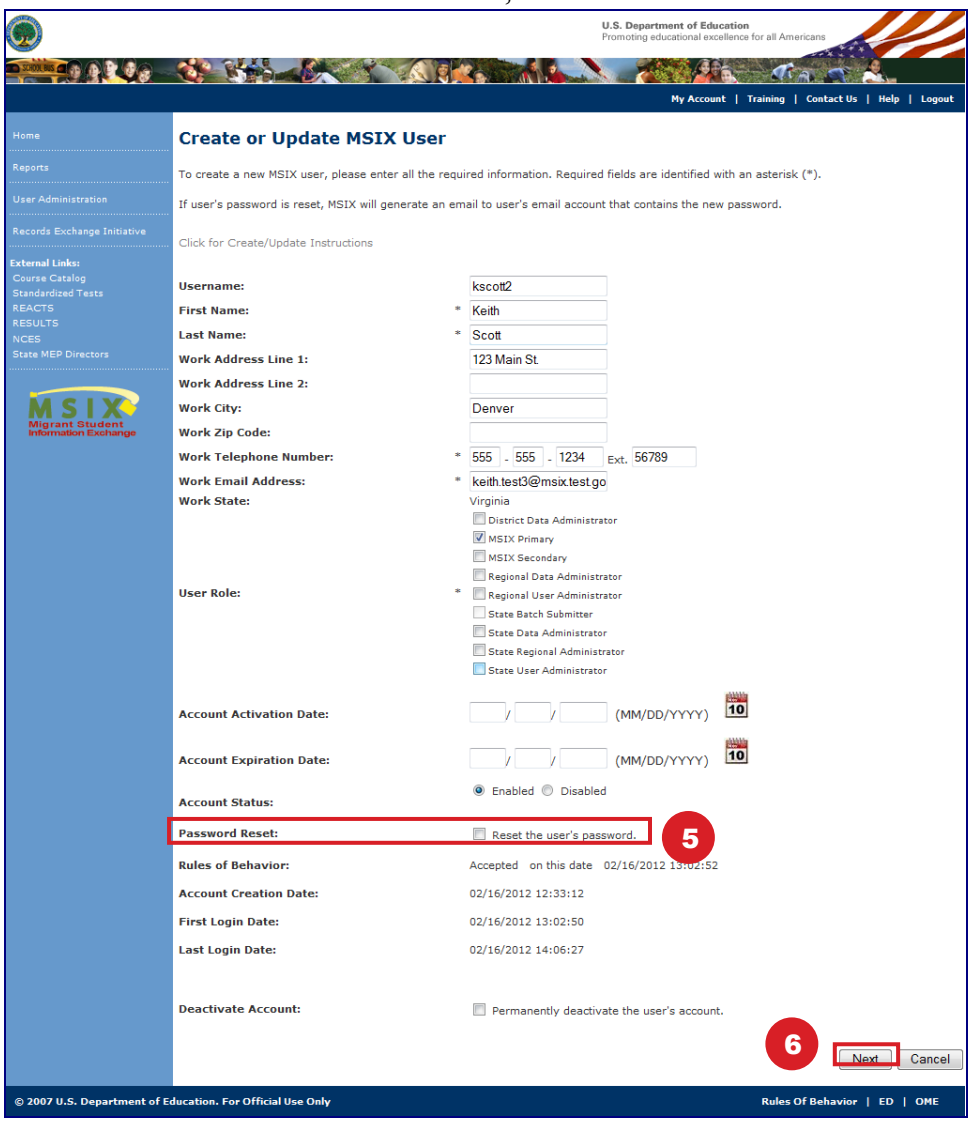
Select the User Account to Reset

On the "User Administration" page, identify the user account that needs to be reset.

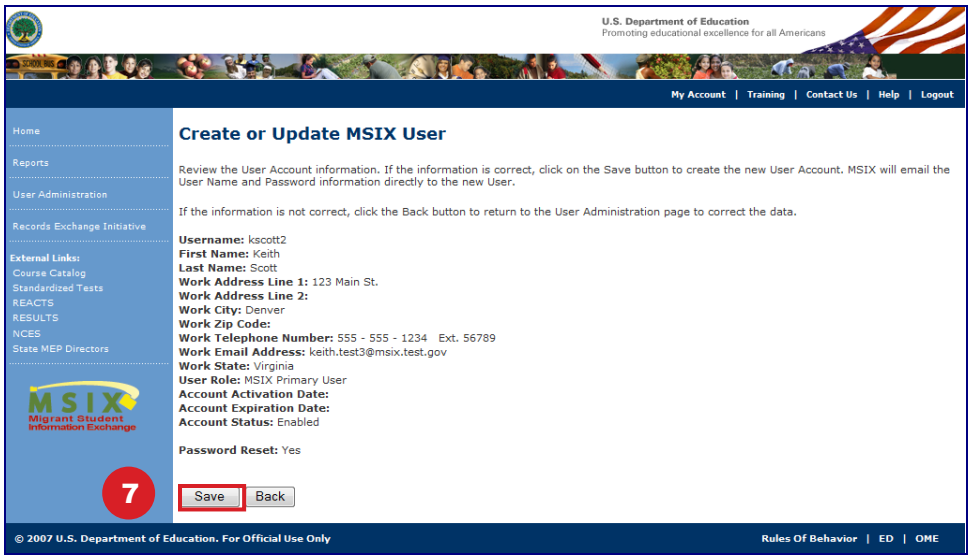


Reset the Password

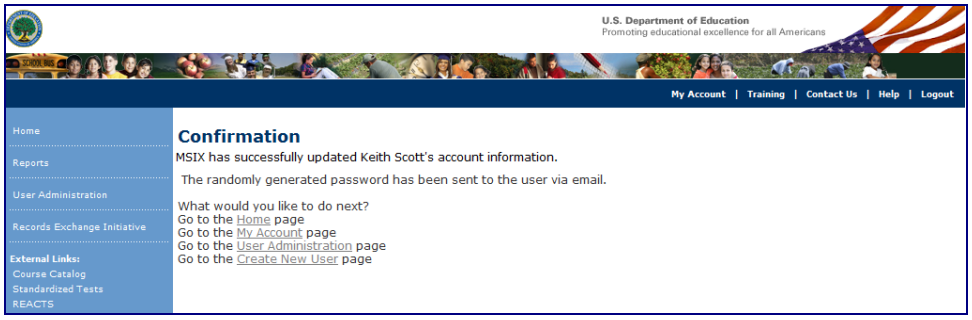
Check the box to **Reset Password.** Then, click the **Next** button.



Confirm Your Action
Review your changes before you save your action.



Review the Confirmation of Your Action
MSIX generates an email notification to the user containing the new password information.



Disabling or Deactivating User Accounts

Disabling a user account is the process that prevents the user from accessing MSIX. This a temporary change for situations where the user will not need to use MSIX for a period of time. For example, someone may be out on a personal leave of absence and not need to use MSIX during that time. Once the user has returned to work the account can be enabled and they can go back to fulltime use.

Disabling is different from deactivating an account in which case the account is **permanently closed**. MSIX retains record that an account existed, but the account may not be reopened. If an account has been deactivated and the user

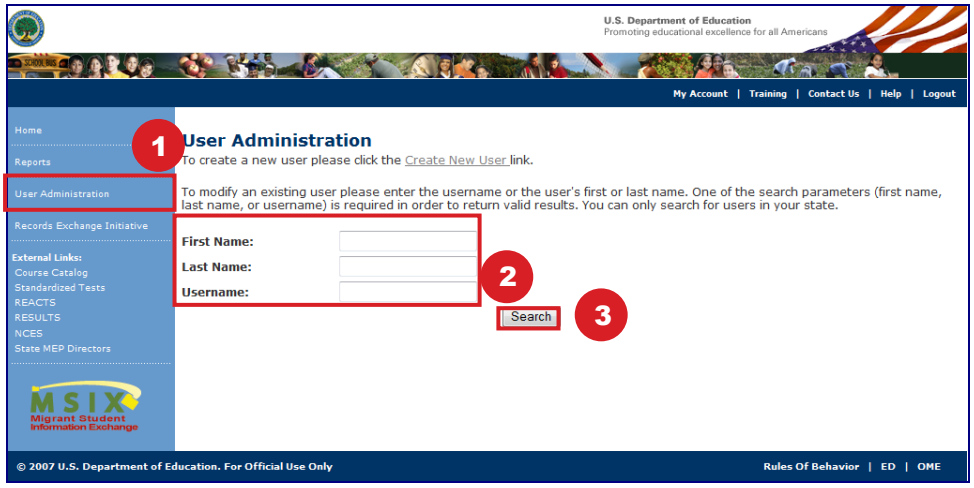
returns to use MSIX again, a new account must be opened. ***Note***, the Help Desk does not reset passwords, create new users, deactivate, or disable existing users.

Steps to Disable or Deactivate a User Account

1. Click the **User Administration** link on the Left-side Navigation, which will take you the "User Administration" page.
2. Enter **First Name**, **Last Name**, or **User Name** into the text fields.
3. Click the **Search** button.
4. Click on a **User** link to select a user from the list of Search Results.
5. To disable an account, select **Disabled** next to Account Status.
6. To deactivate an account, select "Permanently deactivate the user's account" next to Deactivate Account,
7. Click the **Next** button.
8. Click **Save** on the "Confirmation" page.

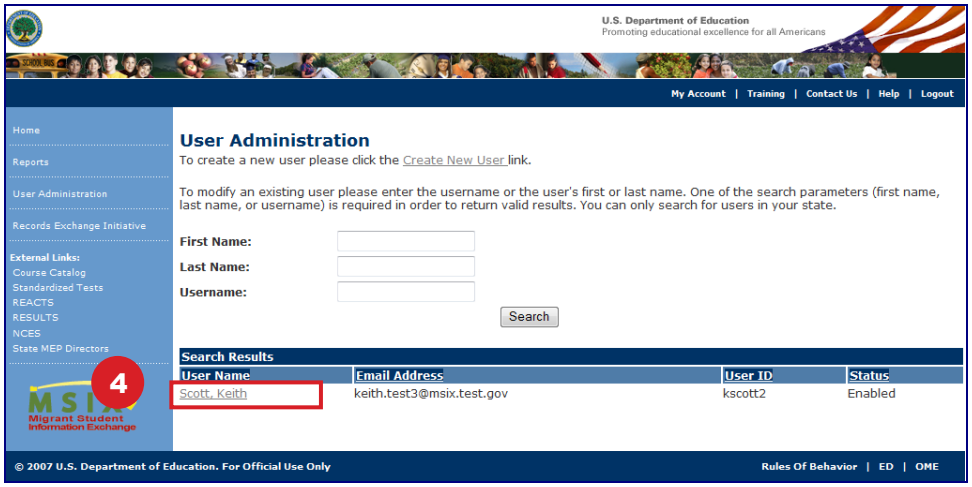
Access the "User Administration" Page

The "User Administration" page provides the Administrator with access to disable or deactivate an existing user's account.



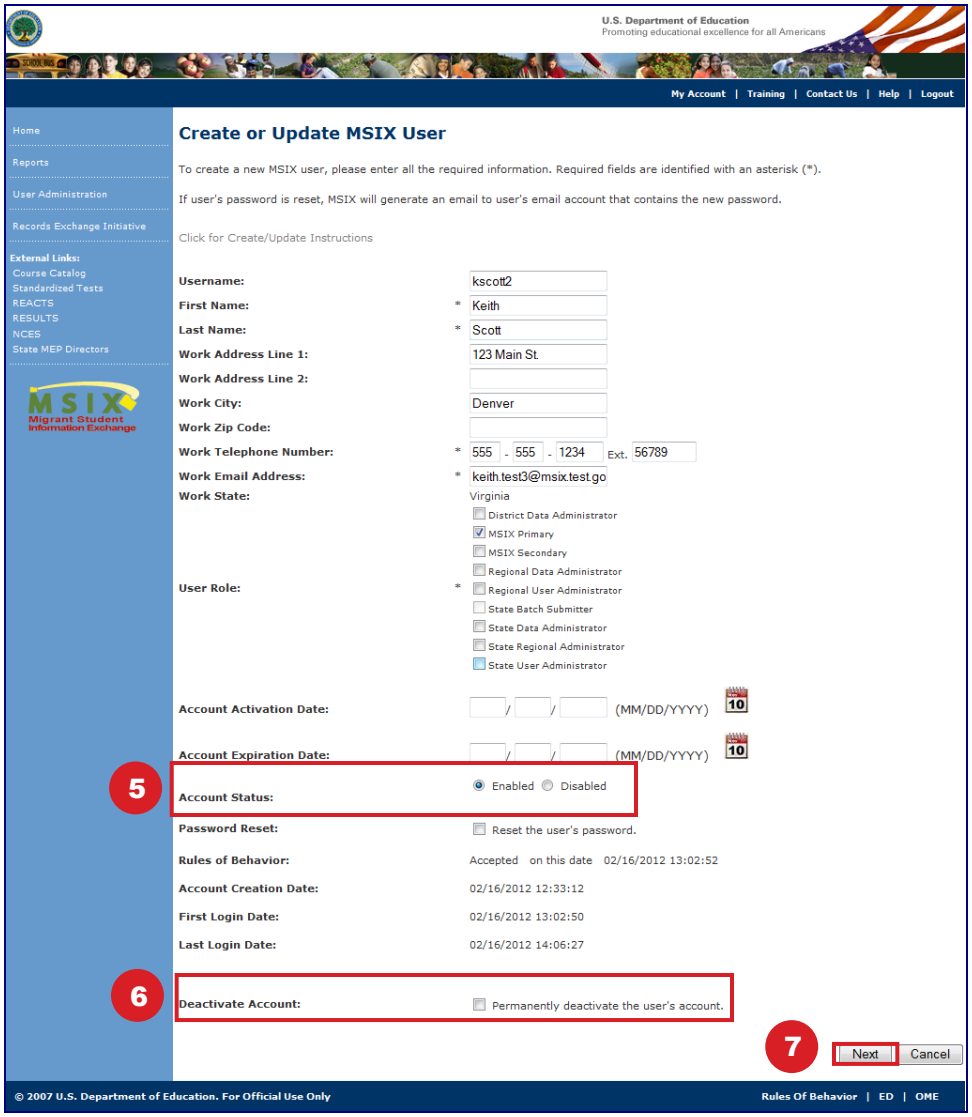
Select the User Account to Disable or Deactivate

On the "User Administration" page, identify the user account that needs to be disabled or deactivated.



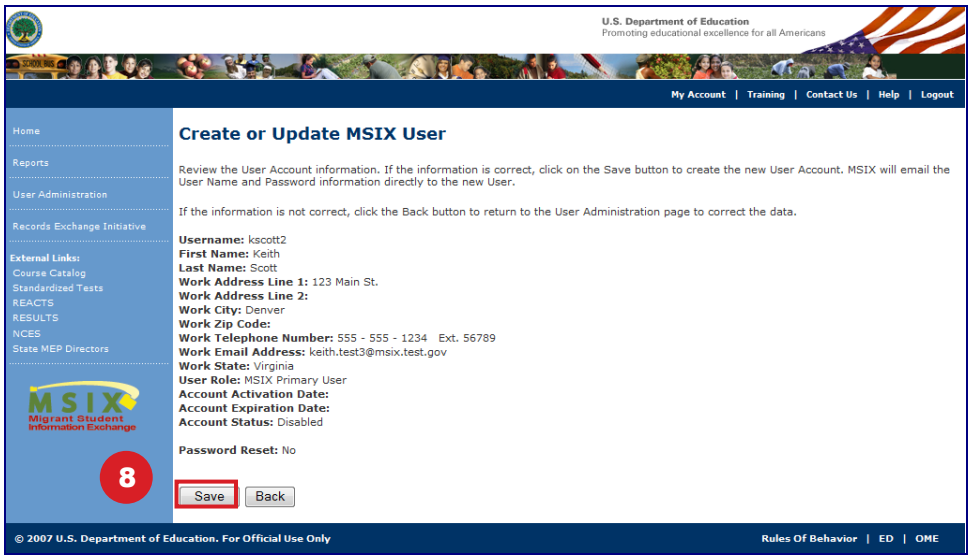
Disable or Deactivate the Account

Select the Account Status as **Disabled** (via the radio button) to disable the user's account or check the **Deactivate Account** box to deactivate the user's account permanently. Then, click the **Next** button.



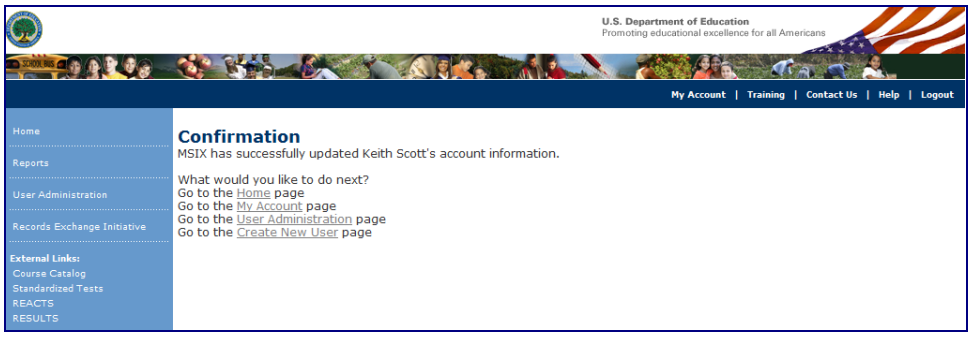
Confirm Your Action

Review your changes before you save your action.



Review the Confirmation of Your Action

MSIX confirms the task you just completed.



Appendix A: Acronyms

Acronyms	Description
ED	U.S. Department of Education
EDEN	Education Data Exchange Network
DOB	Date of Birth
FAQ	Frequently Asked Questions
HTML	HyperText Markup Language
MEP	Migrant Education Program
MS	Microsoft
MSIX	Migrant Student Information Exchange
NCES	National Center for Education Statistics
OME	Office of Migrant Education
PDF	Portable Document Format
ROB	Rules of Behavior

Index

Acronyms, 138
Advanced Search, 40
Change Password, 22, 27
Consolidated View, 30
Contact Us, 18
Course Catalogs, 15
Create a Region, 110
Data Load Report, 64
Disable a Region, 117
Disable Account, 133
ED, 16
Establish User Account, 122
Exact Search, 30
External Links, 15
Footer Elements, 16
Forgot Password, 18
Historical View, 34
Home, 14
How Do I Get an Account?, 18
Log Out, 26
Logging In, 17, 18, 20
Login, 22, 24
Login Error Messages, 21, 80, 91
Login Screen Links, 18
Merging Records, 68, 79, 84, 97
My Account, 27
OME, 16
Partial Search, 30
Potential Merge List, 15
Potential Split List, 15
Print, 44
Records Exchange Initiative, 15
Regional Administration, 14
Regional Structure Administration, 110
Reports, 14, 58
Reset Password, 130
Roles and Responsibilities, 8
Rules of Behavior, 16, 25
Search, 29, 34
Splitting Records, 68, 90
Standardized Test, 15
State MEP Directors, 16
State Region Consolidate View, 120
Student Search, 14
Update a Region, 114
Updating Accounts, 126
User Administration, 15, 122
User Initiated Merges, 85
Validate Near Match, 72
Validating a Merge, 74
Warning, 25
Worklist, 14