

MSIX Release v02.00 Change Notes

December 2007

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Changes have been made to MSIX functionality with the release of version 02.00 (v02.00) to improve the overall functionality of the application. These change notes detail the resulting application and business process changes many of which have been suggested by State MSIX representatives to support MSIX. A change can be defined as any alteration or addition to MSIX. The changes are summarized in Table 1.1 to provide a high-level overview and then are described in detail in the narrative that follows.

Multiple aspects of the change are described in Table 1.1. Some changes introduce totally new MSIX functionality whereas others are revisions or enhancements to functionality that already existed. That difference is noted in the table as “N” for new changes or “E” for enhancements. Each change is described very briefly in the table simply to provide an idea of the change. The more detailed description may be needed to give better understanding. Finally, the roles that are impacted are listed so the user may quickly see what changes affect their use of MSIX.

If there are questions regarding any of the MSIX changes, they should be addressed to the MSIX Help Desk at 1-866-878-9525 or through email at MSIXSupport@deloitte.com.

No.	Change Item	N	E	Primary	Secondary	State Data Admin	Regional Data Admin	District Data Admin	State Regional Admin	State User Admin	Regional User Admin	Government Admin	OME User Admin	Privacy Act Admin
1.	Report: Worklist Reports	X				X	X	X				X		
2.	Report: Annual Management Reports	X								X	X	X		
3.	Report: User Administration Reports	X								X	X	X		
4.	Report: Worklist Aging Reports	X				X	X	X				X		
5.	Calendar Picks on Date Entry Fields		X	X	X	X	X	X		X	X	X	X	X
6.	MSIX Reference Data in Title Case		X	X	X	X	X	X	X	X	X	X	X	X
7.	Re-order Birth Country and Birth State on Advanced Search Page		X	X	X	X	X	X						X
8.	External Link to NCES	X		X	X	X	X	X	X	X	X	X	X	X
9.	Guidance on how to use Comments fields.		X	X	X	X	X	X						

No.	Change Item	N	E	Primary	Secondary	State Data Admin	Regional Data Admin	District Data Admin	State Regional Admin	State User Admin	Regional User Admin	Government Admin	OME User Admin	Privacy Act Admin
10.	Comments Field Character Limits		X	X	X	X	X	X						
11.	Comments Field for Notifications		X	X	X	X	X	X						
12.	Emphasized Merge/Split User Comments		X			X	X	X						
13.	Ability to Sort all MSIX Columns	X		X	X	X	X	X	X	X	X	X	X	X
14.	Printing Consolidated Reports		X	X	X	X	X	X				X		
15.	Flagging Multiple Students for Merge from Student Search Results Page		X	X		X	X	X						
16.	Privacy Act Compliance	X		X	X	X	X	X						X
17.	Multiple Browser Options	X		X	X	X	X	X	X	X	X	X	X	X
18.	Raw Data Query Available	X				X	X	X						
19.	Help Desk FAQs		X	X	X	X	X	X	X	X	X	X	X	X
20.	Data Administrator Identified for Each Student	X		X	X	X	X	X						X
21.	Support Partial DOB Searches		X	X	X	X	X	X						
22.	Online Training Modified		X	X	X	X	X	X	X	X	X	X	X	
23.	Notification Message Copied to Originator		X	X	X	X	X	X						
24.	Locked Student Record Explanation	X		X		X	X	X						
25.	Secondary User Role Modified		X		X									
26.	Cursor Auto-advance in Phone Number and Date Fields		X	X	X	X	X	X		X	X		X	X

Table 1.1 – Change Items Overview

Change Item: 1 – Report: Worklist Reports

Associated MSIX Roles: Data Administrator, Government Administrator

Users are provided with the ability to generate two reports displaying worklist transactions. Both reports can be found under Worklist reports, listed under the Reports section of MSIX. The Open Worklist report allows users to view all of the worklist transactions performed within a given day. The User Worklist report provides users with a summary of all of the worklist tasks and transactions performed by them in a given day.

Change Item: 2 – Report: Account Management Reports

Associated MSIX Roles: User Administrator, Government Administrator

Users are provided with the ability to run a report that displays all user accounts for a state and shows the date they last accessed MSIX. This report, the User Account List Report, supports the annual review of accounts by displaying account status, account expiration date, and account creation date. The User Account List Report can be found under User Management Reports, listed under the Reports section of MSIX.

Change Item: 3 – User Administration Reports

Associated MSIX Roles: User Administrator, Government Administrator

Users are provided with the ability to run a report that displays detailed information about user accounts for a state. This report, the User Detail Report, displays the role, state, district, and contact information for all users in a given state. The User Detail Report can be found under User Management Reports, listed under the Reports section of MSIX.

Change Item: 4 – Report: Worklist Aging Reports

Associated MSIX Roles: Data Administrator, Government Administrator

Worklist Aging Reports are now available in MSIX. These reports provide Data Administrators the opportunity to review the status of pending worklist items. These reports will include information such as the type of worklist item (near match, split, or merge, etc.), the district or region, the date of last action, person the worklist item is currently assigned to, student name, MSIX ID, State Student ID, etc.

Change Item: 5 – Calendar Picks on Date Entry Fields

Associated MSIX Roles: Primary, Secondary, Data Administrator, User Administrator, Government Administrator, Privacy Act Administrator

This functionality allows users to use a calendar to select a date. The calendar allows users to take advantage of a more user-friendly, graphical format when selecting a date. The

functionality is available on the Student Search pages and User Administration pages. The original date fields, used to enter dates manually, are still available to the user.

Change Item: 6 – MSIX Reference Data in Mixed Case

Associated MSIX Roles: All

MSIX Reference Data is now displayed in mixed case. Previously, the reference data was shown using only capital letters. This change was implemented to improve user-friendliness and the readability of the text. Examples of reference data include district names and school data.

Change Item: 7 – Re-order Birth Country and Birth State on Advanced Search Page

Associated MSIX Roles: Primary, Secondary, Data Administrator, Privacy Act Administrator

Previously, when performing an Advanced Student Search, users would view all Birth States after selecting a value for Birth Country. Now, Birth Country is listed ahead of the Birth State on the Advanced Student Search Page. When a user selects a value for Birth Country, the Birth State drop down will only display states located in the selected Birth Country. This will prevent users from performing a student search with a Birth Country and Birth State that do not match. Users may still select only a Birth State, if desired.

Change Item: 8 – External Link to NCES

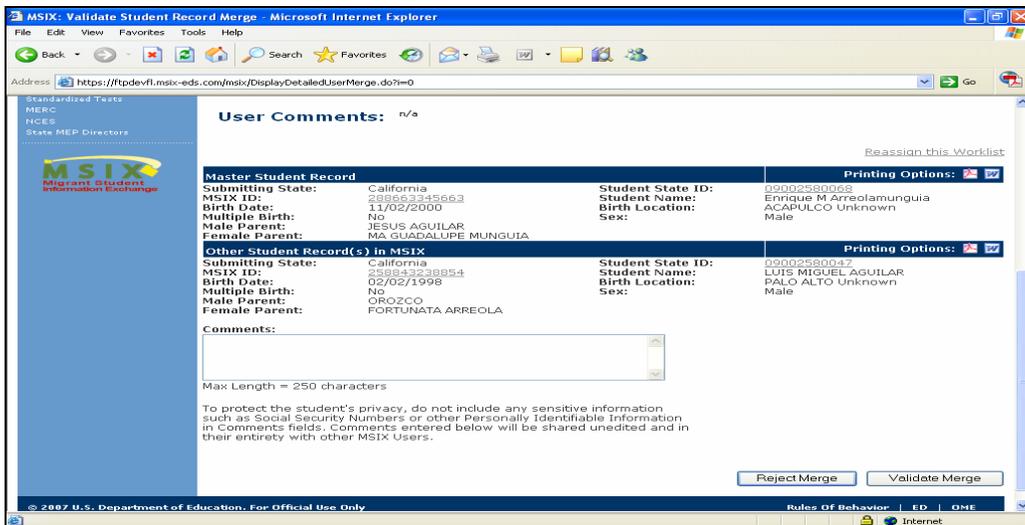
Associated MSIX Roles: All

On the left-hand navigation panel, MSIX now provides an external link to the National Center for Education Statistics (NCES) website. The NCES is the primary federal entity that collects and analyzes data related to education. The school and district reference data in MSIX was provided by NCES. This website is useful for users interested in finding more information regarding the schools and school districts that have been loaded into MSIX.

Change Item: 9 – Comments Field Guidance

Associated MSIX Roles: Primary, Secondary, Data Administrator

MSIX users are provided with instructions when they enter information in the Comments fields found on the Merge, Split Resolution, Near Match, Validation, and Initiation pages. These instructions emphasize the importance of not entering Personally Identifiable Information (PII) such as a Social Security Number (SSN). Comments are shared unedited and in their entirety with other MSIX users and any personal information should be not be included.



Change Item: 10 – Comments Field Character Limits

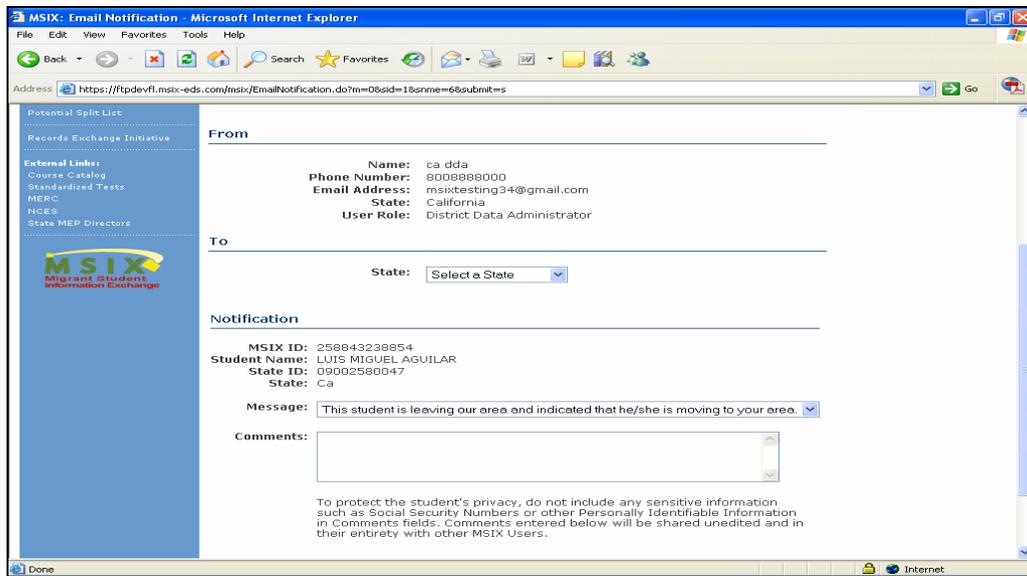
Associated MSIX Roles: Primary, Secondary, Data Administrator

MSIX users are provided with text that states maximum number of characters as 250 when entering text in a Comments field on the Merge, Split, or Near Match validation pages. It helps MSIX users to compile all the relevant information regarding worklist item to share with other MSIX users.

Change Item: 11 – Comments Field for Notifications

Associated MSIX Roles: Primary, Secondary, Data Administrator

MSIX shall display a Comments field on the Email Notification page so that MSIX users can enter relevant information to inform another user of an upcoming student move. These instructions emphasize the importance of not entering Personally Identifiable Information (PII) such as a Social Security Number (SSN). Comments are shared unedited and in their entirety with other MSIX users and any personal information should be not be used.



Change Item: 12 – Emphasized Merge/Split User Comments

Associated MSIX Roles: Data Administrator

MSIX shall display the user-entered comments prominently in the correct format in the Comments field on the Merge, Split, and Near Match validation pages. This helps other MSIX users to more easily see information regarding the worklist item.

Change Item: 13 – Ability to Sort all MSIX Columns

Associated MSIX Roles: All

Users are now provided the ability to sort ascending and descending data on several pages. The Student Search Results, User Administration Search Results, and Regional Administrator lists of Districts (search results) pages allow users to click on the column headers to sort the search results in ascending or descending order. This will facilitate finding specific items within a long list of search results.

Change Item: 14 – Printing Consolidated Reports

Associated MSIX Roles: Primary, Secondary, Data Administrator, Government Administrator

Users are provided with the ability to select which sections they would like to print on the Consolidated Student Report. Previously, when a user wanted to print a Consolidated Student Report, every section was always generated. Now, when a user attempts to print a Consolidated Student Report, they are provided with an option box that allows users to identify and print only the data they currently need and suppress other information.

Change Item: 15 – Flagging Multiple Students for Merge from Student Search Results Page

Associated MSIX Roles: Data Administrator

Users can now flag multiple students for merge from the Student Search Results page. Previously, users would have to view the consolidated record for each student that they would like to flag for merge. Now, after performing a student search, a 'Flag for Merge' checkbox appears next to each student record displayed on the Student Search Results page. Users can click the check box for multiple students, and after selecting the students, users can initiate the merge process by clicking on the 'Flag for Merge' button.

Change Item: 16 – Privacy Act Compliance

Associated MSIX Roles: Primary, Secondary, Data Administrator, Privacy Act Administrator

To comply with the Privacy Act of 1974, MSIX supports the entry of a student or guardian's statement disputing the data contained for the student in MSIX. A dispute statement can be entered by an OME user with the Privacy Act Administrator role. The dispute statement will be visible on the Consolidated View for that student in a new Privacy Act tab. The Privacy Act tab will be displayed only for students that have had a dispute entered.

Change Item: 17 – Multiple Browser Options

Associated MSIX Roles: All

To improve ease of use, MSIX may be accessed through multiple browsers to include Firefox, Netscape, Safari, and Internet Explorer. Specifically, MSIX shall be accessible through the following browsers through its initial rollout:

- Internet Explorer v5.5 or higher
- Firefox v1.5 or higher
- Netscape v7.0 or higher
- Safari v2.0 or higher

Change Item: 18 – Raw Data Query Available

Associated MSIX Roles: Data Administrator

MSIX now allows authorized, logged-in users to query all historical raw data for successfully loaded files for a particular student. Raw data is the unprocessed data that is directly received from state files. By checking the raw data, state representatives may validate and verify the integrity of student information in MSIX. A Data Administrator may access the raw data by clicking on the Raw Student Record Data link at the top of the Consolidated and Historical view pages.

Change Item: 19 – Help Desk FAQs

Associated MSIX Roles: All

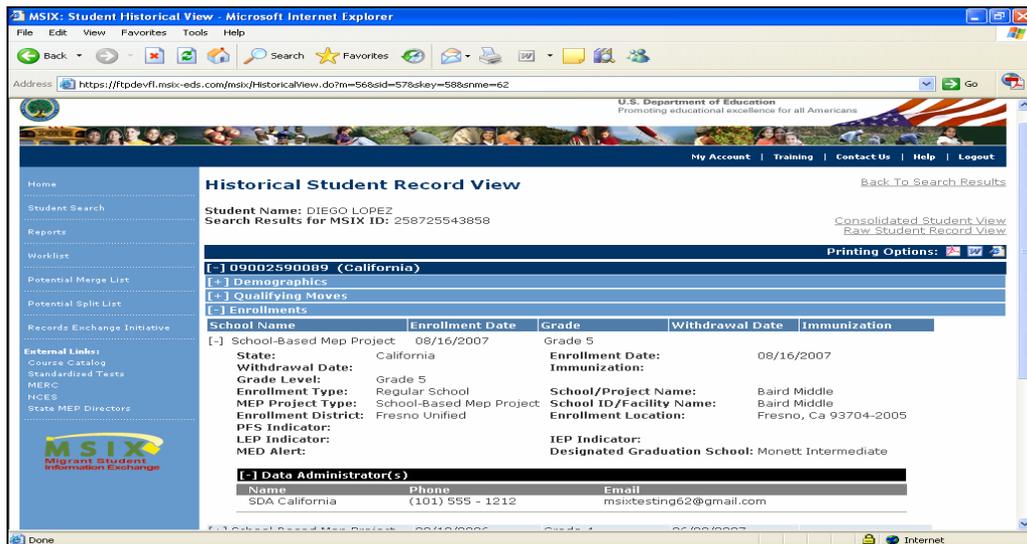
MSIX displays Frequently Asked Questions (FAQs) under the Help menu after user signs into MSIX. The FAQs have been updated to include more specific information regarding the tasks

that can be performed by the MSIX Help Desk and those that cannot be performed by the MSIX Help Desk.

Change Item: 20 – Data Administrator Identified for Each Student

Associated MSIX Roles: Primary, Secondary, Data Administrator, Privacy Act Administrator

MSIX shall display 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. This will help users to identify the correct Data Administrators to contact for questions or issues regarding a student's records.



Change Item: 21 – Support Partial DOB Searches

Associated MSIX Roles: Primary, Secondary, Data Administrator, Privacy Act Administrator

MSIX now enables users to search for students based on the date of birth (DOB) when they only have partial date information. If the user enters 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.

Change Item: 22 – Online Training Modified

Associated MSIX Roles: All

The MSIX Online Training modules provide flashing green arrows that prompt users how to proceed. The timing of the arrows has been modified to allow users more time to read each page and to determine the appropriate course of action, before being prompted by the arrows.

Change Item: 23 – Notification Message Copied to Originator

Associated MSIX Roles: Primary, Secondary, Data Administrator

When a user sends a student move notification they will be copied on the Student Move Notification 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 the sender's contact information.

Change Item: 24 – Locked Student Record Explanation

Associated MSIX Roles: Primary, Data Administrator

When a user attempts to flag a record that is already flagged/locked, the user will be redirected to a new screen that indicates why the record is locked. The contact information of the person assigned to the record will also be included. This will enable the user to know why the record is locked and to obtain more information on the status or resolution of the record.

Change Item: 25 – Secondary User Role Modified

Associated MSIX Roles: Secondary

Modifications have been made to the Secondary User role as follow:

- Secondary Users will now *be able* to: 1) search and display students in **all** states; and 2) send student move notifications.
- Secondary Users will *no longer be able* to: 1) initiate merges and/or splits; 2) download student records; and 3) access the Dataload and Data quality reports.

Change Item: 26 – Cursor Auto-advance in Phone Number and Date Fields

Associated MSIX Roles: User Administrator, Data Administrator

The phone number and date fields on the Student Search and User Administration pages have been modified to automatically advance the cursor through the multiple fields that compose each data element, without the need to press the Tab key.