



MSIX Training Environment Guide



MSIX
Migrant Student
Information Exchange

U.S. DEPARTMENT OF EDUCATION

MSIX Training Environment Guide

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“MSIX IS ONLY AVAILABLE TO AUTHORIZED USERS”

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1.0 Training Environment Overview

1.1 Purpose

This document is intended to provide a description of the Migrant Student Information Exchange (MSIX) Training Environments, the policies for reserving and using the environments, guidance for conducting training, and the available associated training materials. The MSIX Training Environments have been established to provide a forum for continuing hands-on learning for the MSIX application.

The three MSIX Training Environments may be reserved by state Migrant Education Program (MEP) officials to support specific in-state training initiatives. Further information is provided in the following sections to describe how to reserve a MSIX Training Environment and how long it can be reserved.

This document also provides general recommendations for conducting the training activities and includes a complete description of the materials available to support MSIX training events. It is anticipated that training event coordinators and/or facilitators will work with members of the MSIX team to identify the materials best suited to meet their training event's goals and objectives.

1.2 Environment Description

The MSIX Training Environments are separate environments from the MSIX Production environment that are designed to support a series of documented MSIX hands-on training exercises. The environments can be accessed through any Internet connection. A list of available User IDs and Passwords will be provided to those reserving an environment for a training event. To prevent unauthorized access to the environments that potentially could disrupt a training event, the provided User IDs and Passwords will only be available during the reservation period.

The MSIX Training Environments have also been configured to prevent email notifications. This change was incorporated to prevent any potential confusion between actual MSIX-generated email notifications and any email notifications used for training purposes.

2.0 Policies and Procedures

The following sections provide additional information regarding how to request use of a MSIX Training Environment and guidance on how to structure a training event using that environment.

2.1 Requesting an Environment

An MSIX Training Environment can be reserved by any state MEP Team. The state should contact the MSIX Help Desk at 866-878-9525 or by email (msixsupport@deloitte.com) to request an MSIX Training Environment reservation. A reservation allows the state to use the environment for up to five consecutive days with one day for the trainer's preparation, if

needed. The MSIX Team requires two full business days between training events to reset the environment for use by another state. Reservations must be made at least six business days prior to the training event.

The MSIX Help Desk can tentatively schedule the training event for a state upon contacting the Help Desk and will follow up with a confirmed reservation date. Once a reservation request has been confirmed, a member of the MSIX Team will contact the requestor to discuss the training format, provide more detailed information about the environment, outline the supporting training materials, and answer any outstanding questions.

2.2 Training Event Format

The MSIX Training Environments have been designed to support training events similar to the MSIX Train-the-Trainer Conferences conducted by the MSIX Team on an annual basis. The student and user data available in the environments can support training events with up to 25 students. However, class sizes of 20 students or fewer are strongly recommended.

The MSIX Training Environments and supporting materials are designed to be used in an instructor-led, hands-on training format. The training materials consist of a standard MSIX presentation and a series of role-based, hands-on exercises to introduce the training participants to MSIX resources and navigation, and each of the MSIX user roles. It is recommended that the participants take the MSIX Online Training modules before beginning the hands-on exercises. The online training modules can either be identified as pre-requisites prior to attending the training event, or scheduled prior to the hands-on exercises as part of the training event.

A more detailed description of the materials available to support events in the MSIX Training Environments is provided below in the Training Materials section.

2.3 Support

In the unlikely event that problems occur in an MSIX Training Environment during a training event, contact the MSIX Help Desk at 866-878-9525 or by email at msixsupport@deloitte.com to report the issue. When possible, the Help Desk staff will provide instructions to resolve the issue. In all other situations, the Help Desk staff will contact the appropriate members of the MSIX Team to resolve the issue. To provide the highest possible level of support for MSIX users, resolution of any Production issues reported on MSIX will take precedence over issues reported in the MSIX Training Environments.

3.0 Training Materials

A set of materials has been developed and made available to states to support training events conducted in the MSIX Training Environments. These materials, as described below, provide the framework upon which an MSIX training event can be designed. Depending upon the audience and objectives for the training event, only a subset of these materials may be used. Recommendations on how to structure training events to best utilize the available materials will be provided after the reservation is confirmed.

3.1 Module Structure

3.1.1 Presentation

A Microsoft PowerPoint presentation is available to connect the various components of the training event and provide an overall structure to the event. Based heavily upon the presentation used at the MSIX Train-the-Trainer Conferences, this presentation includes overview materials for MSIX and the Records Exchange Initiative. It also includes materials describing each of the MSIX User Roles that can be used as an introduction to the associated hands-on exercises or demonstration.

The complete presentation contains materials on basic MSIX topics and can be tailored by states to align with the objectives of each conference or training event.

3.1.2 Exercises

The MSIX hands-on training exercises are designed to give users an opportunity to use MSIX to perform activities similar to those that will be performed as part of their regular job responsibilities. The exercises are intended to be performed after the user has taken the corresponding MSIX online training module. It is recommended that the participants either complete the MSIX online training modules prior to attending the training event, or that the training event be structured to include time to complete the online training modules before beginning the hands-on exercises.

The MSIX Training Environments contain all the data necessary to complete the hands-on exercises. Due to the close relationship between the training exercises and the data, the MSIX team cannot customize the materials and data to meet special state-specific needs. Each exercise includes instructions to log into MSIX in a specific role. Specific User IDs and Passwords are *not* documented in the training exercises, but will be provided to the Training Facilitator when a Training Environment is reserved. User IDs and Passwords will be changed for each state event to prevent unauthorized access to the environment that could potentially disrupt other planned training events.

The hands-on exercises are designed to provide role-specific instruction to users. A complete list of the available exercises, and their applicability to each MSIX role, is provided below.

	-- Target Audiences --				
	Secondary	Primary	Data Admin	User Admin	Region Admin
Module 1 - Introduction and Overview Pop Quiz	✓	✓	✓	✓	✓
Module 2 - Managing Your Account Exercise 2-1: MSIX Website Review Exercise 2-2: General Login & Navigation	✓ ✓	✓ ✓	✓ ✓	✓ ✓	✓ ✓
Module 3 - Using Student Data Exercise 3-1: Searching for Students Exercise 3-2: Sending Move Notifications Exercise 3-3: Using a Move Notification	✓ ✓	✓ ✓	✓ ✓ ✓		
Module 4 - Merging and Splitting Records Exercise 4-1: Initiating a Merge Exercise 4-2: Initiating a Split		✓ ✓	✓ ✓		
Module 5 - Managing Your Worklist Exercise 5-1: Near Match Resolution Exercise 5-2: Validate/Reject a User Initiated Split			✓ ✓		
Module 6 - User Account Administration Exercise 6-1: Create New User Accounts Exercise 6-2: Modifying User Accounts Exercise 6-3: User Administration Reports				✓ ✓ ✓	
Module 7 - Using MSIX Reports Exercise 7-1: Student Information Reports Exercise 7-2: Student Mobility Reports Exercise 7-3: Worklist Reports Exercise 7-4: Data Quality Reports	✓ ✓	✓ ✓	✓ ✓ ✓ ✓		
Module 8 - Region Administration Exercise 8-1: Create Regions Exercise 8-2: Modify Regions					✓ ✓
Module 9 - MSIX User Support & Training Program Exercise 9-1: Scavenger Hunt	✓	✓	✓	✓	✓

Figure 3.1.2-1: Training Module Hands On Exercise Listing

3.2 Training Module Content

3.2.1 Module 1: Introduction and Overview

	-- Target Audiences --				
	Secondary	Primary	Data Admin	User Admin	Region Admin
Module 1 – Introduction and Overview Pop Quiz	✓	✓	✓	✓	✓

Module 1 is intended to provide trainees with an overview of the background and objective of MSIX as well as the functions in MSIX by user role. This module provides a pop quiz to test the trainees' knowledge of MSIX and provides a high level overview of the key features of MSIX.

- **Pre-Test**

The Pre-Test contains 10 questions to gauge the participant's current knowledge of MSIX. It is intended to be given at the start of a training event to help determine

how much exposure the participants have already had to MSIX and the Records Exchange Initiative.

3.2.2 Module 2: Managing Your Account

	-- Target Audiences --				Region Admin
	Secondary	Primary	Data Admin	User Admin	
Module 2 - Managing Your Account					
Exercise 2-1: MSIX Website Review	✓	✓	✓	✓	✓
Exercise 2-2: General Login & Navigation	✓	✓	✓	✓	✓

Module 2 is intended to provide trainees with an overview of MSIX navigation methods and the supporting MSIX resource materials. These exercises are recommended as the starting point for all potential MSIX users, regardless of their eventual anticipated role. They walk the user through all of the resources that are found outside the MSIX application on the MSIX Sign In page as well as those resources inside the application that are available to every user.

- **Exercise 2-1 – MSIX Website Review**

This exercise leads participants through an overview of the resources available on the MSIX Trainers’ Corner and other Sign In page links.

- **Exercise 2-2 –General Login and Navigation**

This exercise provides login and logout instructions and an overview of MSIX navigation options. It also introduces the available external links, resources found on the Home page, and options for using the My Account page.

3.2.3 Module 3: Using Student Data

	-- Target Audiences --				Region Admin
	Secondary	Primary	Data Admin	User Admin	
Module 3 - Using Student Data					
Exercise 3-1: Searching for Students	✓	✓	✓		
Exercise 3-2: Sending Move Notifications	✓	✓	✓		
Exercise 3-3: Using a Move Notification			✓		

Module 3 is designed to provide instruction and examples of common functions performed by MSIX users in utilizing student data. Users that will be assigned the Primary User, Secondary User and Data Administrator roles will benefit from performing these hands-on exercises.

- **Exercise 3-1 – Searching for Students**

This exercise instructs the user in performing basic and advanced student searches in MSIX. It also introduces the Student Search Results page, provides an opportunity to review the Student Consolidated and Historical views, and how to utilize the State Student ID History feature.

- **Exercise 3-2 – Sending Move Notifications**

This exercise demonstrates the student move notification functionality by walking participants through the process to create and send a notification when a student moves out of the user’s jurisdiction.

- **Exercise 3-3 – Using a Move Notification**

This exercise reviews the usefulness of a student move notification when a user receives a notification and simulates some of the actions a user may take when they receive a move notification from another state.

3.24 Module 4: Merging and Splitting Records

	-- Target Audiences --				
	Secondary	Primary	Data Admin	User Admin	Region Admin
Module 4 - Merging and Splitting Records					
Exercise 4-1: Initiating a Merge		✓	✓		
Exercise 4-1: Initiating a Split		✓	✓		

This module reviews the details and process of initiating both a merge and split of student records. The exercises provide instruction on identifying student records that needs to be merged or split and then initiating the action.

- **Exercise 4-1 – Initiating a Merge**

This exercise demonstrates how to conduct a basic search for students using an MSIX ID, then initiating a merge for two student records to create a consolidated student record for these students.

- **Exercise 4-2 – Initiating a Split**

This exercise instructs the user to initiate a split to separate a previously merged student record into multiple separate MSIX records.

Lists of student records to be merged and split are provided for use with these exercises.

3.25 Module 5: Managing Your Worklist

	-- Target Audiences --				
	Secondary	Primary	Data Admin	User Admin	Region Admin
Module 5 - Managing Your Worklist					
Exercise 5-1: Near Match Resolution			✓		
Exercise 5-2: Validate/Reject a User Initiated Split			✓		

This module is intended for Data Administrators in resolving or reassigning the worklists that are assigned to them. It reviews the matching process, the worklist assignment and escalation process as well as the types of worklists. It also reviews the worklist history and worklist search functionalities. The exercises provide instruction on resolving worklists by validating, rejecting, or reassigning the items.

- **Exercise 5-1 – Near Match Resolution**

This exercise demonstrates how to resolve a near match item from the user’s worklist. The steps include accessing the Worklist, selecting a near match worklist item, and resolving the near match.

- **Exercise 5-2 – Validate/Reject a User Initiated Split**

This exercise covers processing a Validate User-Initiated Split worklist entry. It also includes steps that guide the participant through accessing the worklist, selecting a split worklist item, validating the split, and searching for the students whose records were split.

Lists of worklists are provided for use with these exercises.

3.2.6 Module 6: User Administration

	-- Target Audiences --				
	Secondary	Primary	Data Admin	User Admin	Region Admin
Module 6 - User Account Administration					
Exercise 6-1: Create New User Accounts				✓	
Exercise 6-2: Modifying User Accounts				✓	
Exercise 6-3: User Administrator Reports				✓	

The User Administration module is intended for State User Administrators and Regional User Administrators. The exercises provide instruction on creating and modifying MSIX user accounts.

- **Exercise 6-1 – Create New User Accounts**

This exercise demonstrates how to create a new MSIX user account. The participant has the opportunity to create a variety of user accounts using the information provided on sample MSIX User Application forms.

- **Exercise 6-2 – Modifying User Accounts**

This exercise covers the User Administrator search function. It also includes steps that guide the participant through the process to change an existing MSIX user account.

- **Exercise 6-3 – User Administration Reports**

This exercise demonstrates how to access, filter and save the Account List Report to utilize user information in the User Administrator’s state to administer the MSIX accounts in his/her state.

3.2.7 Module 7: Using MSIX Reports

	-- Target Audiences --				
	Secondary	Primary	Data Admin	User Admin	Region Admin
Module 7 - Using MSIX Reports					
Exercise 7-1: Student Information Reports	✓	✓	✓		
Exercise 7-2: Student Mobility Reports	✓	✓	✓		
Exercise 7-3: Worklist Reports			✓		
Exercise 7-4: Data Quality Reports			✓		

The MSIX Reports module is intended for Data Administrators of all levels. The exercises provide instruction on accessing and generating reports based on data in MSIX.

- **Exercise 7-1 – Student Information Reports**

This exercise demonstrates how to access, filter and save the Student Info Reports, which help Data Administrators generate analysis of students in his/her state and at the national level.

- **Exercise 7-2 – Student Mobility Reports**

This exercise demonstrates how to access, filter and save the Student Mobility Reports, which help Data Administrators generate analysis of student moves into or out of the user’s state.

- **Exercise 7-3 –Worklist Reports**

This exercise demonstrates how to access, filter and save the Worklist Reports to check the statuses of worklists of students in his/her state or assigned to users in his/her state.

- **Exercise 7-4 –Data Quality Reports**

This exercise covers how to access and utilize Data Quality Reports, which are based on the data imported into MSIX by the Data Administrator’s state and are meant to show users how to identify areas where their state needs to improve upon that data.

3.2.8 Module 8: Region Administration

	-- Target Audiences --				
	Secondary	Primary	Data Admin	User Admin	Region Admin
Module 8 - Region Administration					
Exercise 8-1: Create Regions					✓
Exercise 8-2: Modify Regions					✓

The MSIX Region Administration module is intended to provide instruction on enabling a regional structure within a state and create and modify regions in that structure. These exercises are intended solely for states that will utilize the optional Regional functionality for User Administration, Data Administration, or both.

- **Exercise 8-1 – Create Regions**

This exercise demonstrates how to enable the Regional functionality and create new regions within a state.

- **Exercise 8-2 – Modify Regions**

This exercise covers the process to view existing regions within a state and modify the districts contained in the regions.

3.2.9 Module 9: MSIX User Support & Training Program

	-- Target Audiences --				
	Secondary	Primary	Data Admin	User Admin	Region Admin
Module 9 - MSIX User Support & Training Program					
Exercise 9-1: Scavenger Hunt	✓	✓	✓	✓	✓

This module is targeted to people that will become MSIX trainers, but it is applicable to all MSIX user roles. It details how to be an MSIX Champion, the adoption process and the trainee's role in making MSIX a success. The hand-on exercise is a final scavenger hunt for the participants to show what they have learned during the training.

- **Exercise 9-1 – Scavenger Hunt**

The Scavenger Hunt is activity that requires participants to search through the MSIX website Sign In page and inside the application to locate the available MSIX support resources. This activity is intended to highlight the variety of supporting materials available to MSIX users and the variety of means available to access them. It is also meant as a job aid for locating that various resources that are available.

3.3 Additional Training Resources

3.3.1 Prepare & Post Materials

To further assist states in their MSIX Training events, the MSIX Team has created a set of tools to enhance the quality of your training. These documents can be individualized to fit the state, participant, and role type of the MSIX training performed. A list of these additional items is provided below. Contact the MSIX Help Desk to request access to these materials prior to the training event.

- **Training Sign-in Sheet** – to verify all attendees present at the training as well as confirm each is an authorized MSIX user
- **MSIX Name Tents** – to place on each participants desk during the training event
- **Agenda** – which can be adjusted based on the modules the state trainer wishes to cover, but provides estimated time frames for each module and exercise
- **MSIX Rules of Behavior** – for reference to trainers and participants about MSIX guidelines and policies
- **MSIX Certificate of Completion** – trainers can print these for each participant following their completion of the training course; it will need to be modified for date, name, module and authorized MSIX trainer
- **Training Evaluation Form** – in an effort to enhance future MSIX trainings, have the participants fill this form out to evaluate the training materials, format and instruction

3.3.2 MSIX Trainers' Corner

In addition to the materials developed specifically to support MSIX training events, a variety of other MSIX resources are also available to MSIX users through the MSIX Trainers' Corner. These materials can also be leveraged in training events as appropriate, based on the goals and objectives of the event. The MSIX Trainers' Corner can be accessed by clicking on the Trainers' Corner link on the MSIX Login page (<https://msix.ed.gov>). The following items are examples of the materials available in the MSIX Trainers' Corner:

- **Online Training** – Six role-based MSIX training courses
- **User Manual** (MS Word, Adobe PDF, 508 Compliant) – Detailed resource for using MSIX
- **Quick Reference Guide** (MS Word, Adobe PDF) – One-page job aide to summarize the steps for the most commonly used MSIX tasks
- **Frequently Asked Questions** (MS Word, 508 Compliant) – Most typically asked questions in a searchable tool
- **User Administrator Guide** (MS Word, Adobe PDF) – Role-specific manual to support User Administrator tasks
- **User Access Guide** (MS Word, Adobe PDF) – Manual to guide users in requesting and acquiring a user account
- **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
- **MSIX Brochure** (Adobe PDF in English and Spanish) – Concise information to describe MSIX presented in a question-style format
- **User Conference Presentation** – A basic overview of MSIX that was used at various conferences to introduce MSIX
- **Webinars** (PPT) – Copies of presentations from MSIX webinars delivered to MSIX users as refresh on various topics
- **MSIX Help Desk** – Phone number and email address for the Help Desk
- **MSIX Change Notes** (MS Word, Adobe PDF) – Descriptions of the enhancements made to MSIX since its initial roll-out in September 2007

4.0 Training Facilitation Tips

While there are many logistical details to attend to when delivering training, there are several other considerations to be aware of as well. Understanding the audience and their needs is particularly important to help them learn most effectively. Adult learners have certain expectations of training experiences, so understanding ways to meet their interest is a valuable skill; additionally, knowing some of the “do’s” and “don’ts” when training will help the session flow more smoothly.

4.1 Adult Learning Principles

As learners, expectations change from child to adult. Children expect to be told exactly what to do and how to react as they learn. Adults instead want justification for why they are spending their time and attention in training. Below are some of the expectations an adult learner has when walking in the door for training. They want to:

- Know **why** they need to learn something
- Learn **experientially** through scenario-based exercises
- Focus on “**real-world**” problems
- Approach learning as **problem-solving**
- See the topic as having **immediate value**

- **Use** what they have learned soon after training
- Learn at their **own pace**

4.2 Conducting the Training Session

Preparation and planning for the training session take considerable time and energy and requires the support of an effectively delivered training session. Here are some of the key areas of focus when delivering the training content:

- **Communicate Key Points** – Understand and elaborate on the essential elements that are important to the state’s or area’s MSIX training agenda. Review the materials in advance to address the areas of special concern.
- **Encourage Participation** – Use open and close-ended questions as the topic dictates to help the participants think through the learning area. Also, recognize the participants’ verbal and non-verbal cues that reinforce what they *do* and *do not* understand. It will take more time for some than others to complete the exercises or grasp certain concepts.
- **Address Participant Questions and Objections** – There may be questions during the session that cannot answer. Don’t hesitate to contact the MSIX Help Desk during breaks or training exercise session to seek those solutions.
- **Handle Challenging Behaviours** – There is always the possibility of encountering difficult behaviours. If this occurs, maintain a relaxed posture—don’t get flustered. Work to maintain the self-esteem of the “challenging participant.” Seek to listen, clarify, and acknowledge what they present, however, at the same time, deal with the behaviour directly, ask the group to deal with it, or ask to discuss it privately.

Appendix A: Acronyms

Acronyms	Description
MEP	Migrant Education Program
MS	Microsoft
MSIX	Migrant Student Information Exchange