

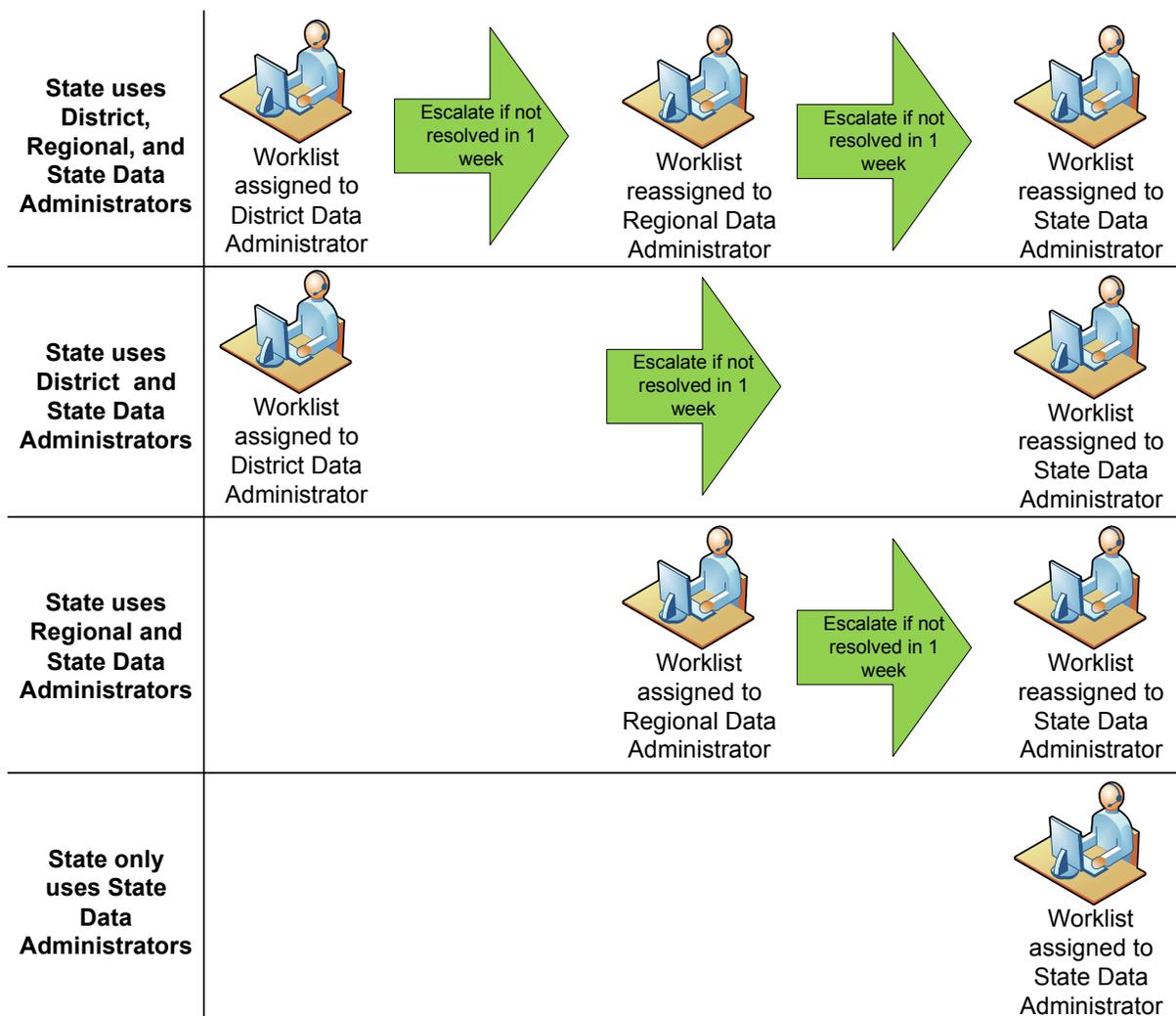
## Overview

MSIX will implement new worklist escalation functionality on January 10, 2011. This new functionality will automatically escalate unresolved worklists from the District Data Administrator level to the Regional Data Administrator and State Data Administrator levels after one week at each level. Additionally, all "Validate" worklist entries will be automatically approved after a total of three weeks on a worklist. Specific details associated with these changes are provided below.

## Worklist Escalation

MSIX provides states with the ability to establish data administrators at the district, regional, and state levels. The use of the district and regional levels are optional, so states can choose to create data administrators at either of these levels or at both of them. All states are required to have at least one data administrator at the state level.

The worklist escalation functionality will automatically reassign unresolved worklists to the next level in the state's data administrator hierarchy after 1 week (7 calendar days). If the state has established Data administrators at each level of the hierarchy, any escalated worklists that are still unresolved after a second week (7 calendar days) will be automatically reassigned to the State Data Administrator level. The diagram below indicates the timeframes to escalate worklists for each possible configuration of data administrators within a state. Regardless of the number of levels in a state's hierarchy, all unresolved worklists will have been escalated to the State Data Administrator level by the beginning of the third week (within 15 calendar days).



At any point in the worklist escalation process, a data administrator can manually reassign a worklist entry to a different data administrator at their same level in their state's hierarchy, or to a data administrator at a lower level in their state's hierarchy.

### **Auto-Validation**

MSIX worklists can contain the following four types of entries:

1. Near Matches
2. Validate Merges
3. Validate User Initiated Merges
4. Validate Splits

Near Match worklist entries are automatically generated by MSIX when a new student record is received that is very similar, but not the same, as an existing MSIX student record. All other types of worklist entries (the "Validate" types) are created as the result of actions taken by users in MSIX, such as resolving a Near Match worklist entry or initiating the process to merge or split MSIX student records. Because the process to create all types of "Validate" worklist entries began with a human decision based on a review of student data, these worklists will be automatically validated if they are not resolved by a data administrator within three weeks. Near Match worklist entries will not be automatically resolved because the records associated with each worklist have not previously been reviewed by an MSIX user.

As discussed above, all worklists will be escalated to the State Data Administrator level by the beginning of the third week. State Data Administrators will have that third week to review and resolve all "Validate" worklist entries. If any worklist entries are not resolved by the end of the third week (21 calendar days from when they were first created), they will be automatically validated. This means that the student records associated with Validate Merge or Validate User Initiated Merge worklists will be automatically merged in MSIX after three weeks. Student records associated with Validate Split worklists will be automatically split in MSIX after three weeks. These items will then be removed from all worklists.

All "Validate" worklists will be automatically processed after 3 weeks (21 calendar days). The use of the worklist reassignment functionality will not alter or extend the 3 week period.

### **Old Worklists**

The functionality described above will apply to all worklists created after January 9, 2011. Worklists created before this date will be processed and escalated according to the following schedule.

All unresolved worklists assigned to District Data Administrators as of January 8, 2011 will automatically be escalated to the next level in their state's hierarchy on January 15, 2011. Those escalated to a Regional Data Administrator will then be escalated to a State Data Administrator on January 22, 2011 if still unresolved.

All unresolved worklists assigned to a Regional Data Administrator as of January 8, 2011 will automatically be escalated to a State Data Administrator on January 15, 2011.

All "Validate" worklist entries as of January 8, 2011 will automatically be processed on January 29, 2011 if still unresolved.

### **Changing Automatically Processed Validations**

Users can use the existing User-Initiated Merge and User-Initiated Split processes to reverse any merges or splits that resulted from automatically processed “Validation” worklist entries.

### **For More Information**

Please contact the MSIX Help Desk for more information on this new functionality.

- MSIX Help Desk email address: [msixsupport@deloitte.com](mailto:msixsupport@deloitte.com)
- MSIX Help Desk phone number: 1-866-878-9525