

Migrant Student Information Exchange (MSIX)

MSIX National Rollout Regional User Conference

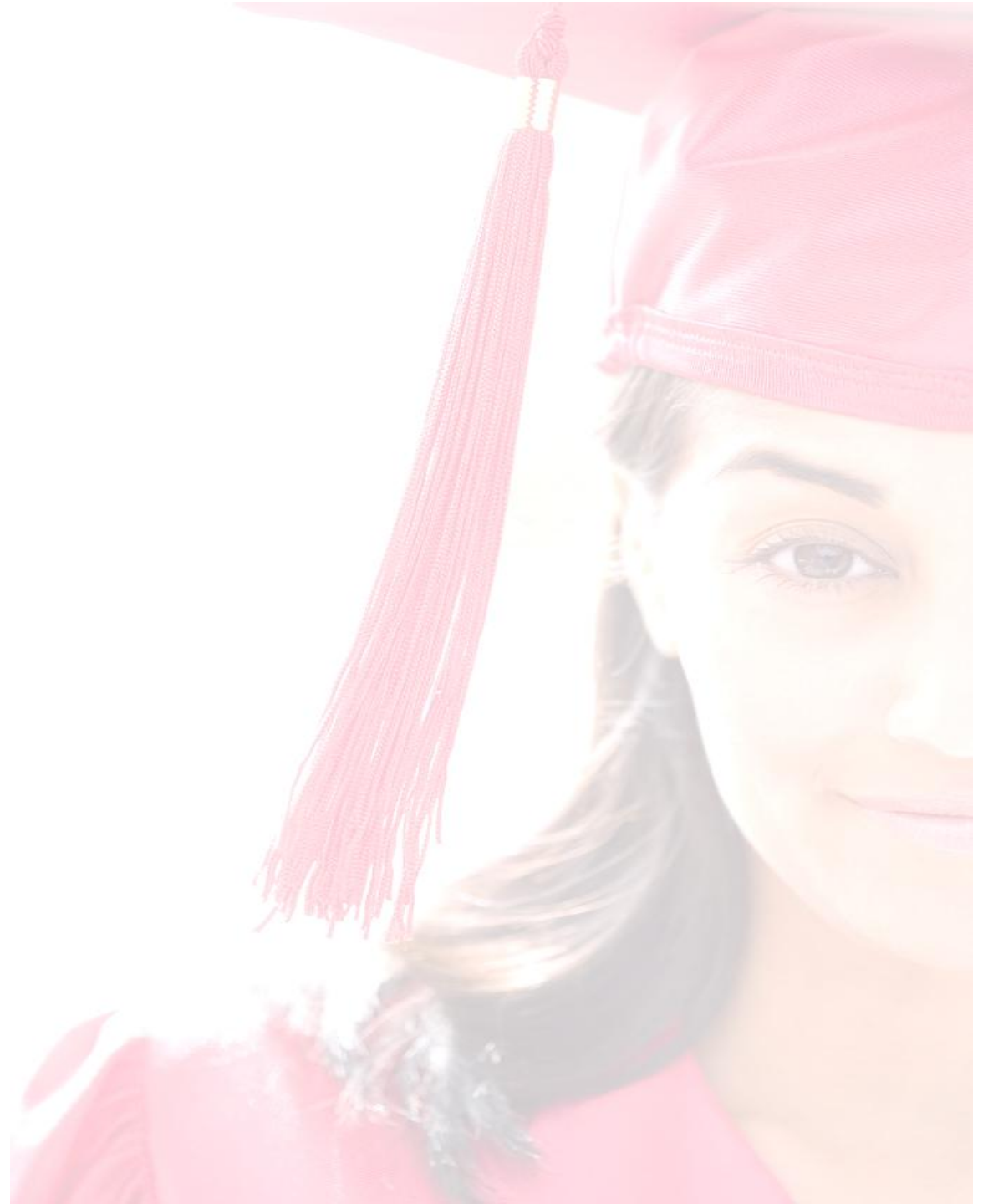
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U.S. Department of Education

Deloitte Consulting LLP



DAY ONE



Welcome, Logistics, and Introductions





Conference Schedule – Day 1

Time	Agenda Item	Description
DAY 1		
9:00 - 9:10	Welcome, Logistics, and Introductions	Overview of the agenda, address conference logistics, and introduce the team members and their respective roles and responsibilities.
9:10 – 9:30	Introduction to MSIX	Description of MSIX background, objectives, and overview
9:30 – 9:50	The MSIX Solution	Description of MSIX business processes, workflows, user roles, and implementation timeline
9:50 - 10:15	Online Tour of MSIX	Overview of system and MSIX functionality from a User perspective
10:15 - 10:30	MSIX Training Materials and Support Tools	Description of the available MSIX training and educational support tools
10:30 - 10:45	BREAK	
10:45 – 11:00	Primary User Role	Overview of the Primary User Role
11:00 – 11:30	Primary User - <i>Online Training</i>	Facilitated walk-through of Primary User online training module
11:30 - 12:00	Primary User - <i>Hands-on Training</i>	Hands-on scenario to: General Login and Navigation
12:00 - 1:00	LUNCH	
1:00 – 1:45	Primary User- <i>Hands-on Training</i>	Hands-on scenarios to: Student Search, Send and Receive Notification
1:45 - 2:30	Primary User - <i>Hands-on Training</i>	Demo and conduct exercises to use training support tools. Focus on T-T-T role and expectations.
2:30 - 2:45	BREAK	
2:45 – 3:00	Data Administrator	Overview of the Data Administrator Role
3:00 - 3:30	Data Administrator - <i>Demonstration</i>	<i>Clarify why this section is demo only and not hands-on.</i> Demo scenarios to: Near Match Resolution, User Initiated Merge, User Initiated Split
3:30 - 4:00	Data Administrator - <i>Online Training</i>	Self-guided walk-through of Data Administrator online training module
4:00 – 4:30	Day 1 Wrap-up Q&A	Group discussion of MSIX functionality. Discussion will be guided based on questions that arise during the conference.



User Conference Logistics

- Conference facility
 - Security
 - Restrooms
 - Smoking areas
 - Food and beverages in the training room
- Reimbursement process
- Questions??

Introduction to MSIX





User Conference Objectives

- MSIX Overview
 - Background
 - Objectives
- Discuss MSIX Roll Out
 - Timeline and Activities
 - User Account Access Process
- MSIX Train-the-Trainer Activities
 - Review Training Resources
 - Online Training Modules
 - Hands-on Exercises
 - MSIX Demonstrations



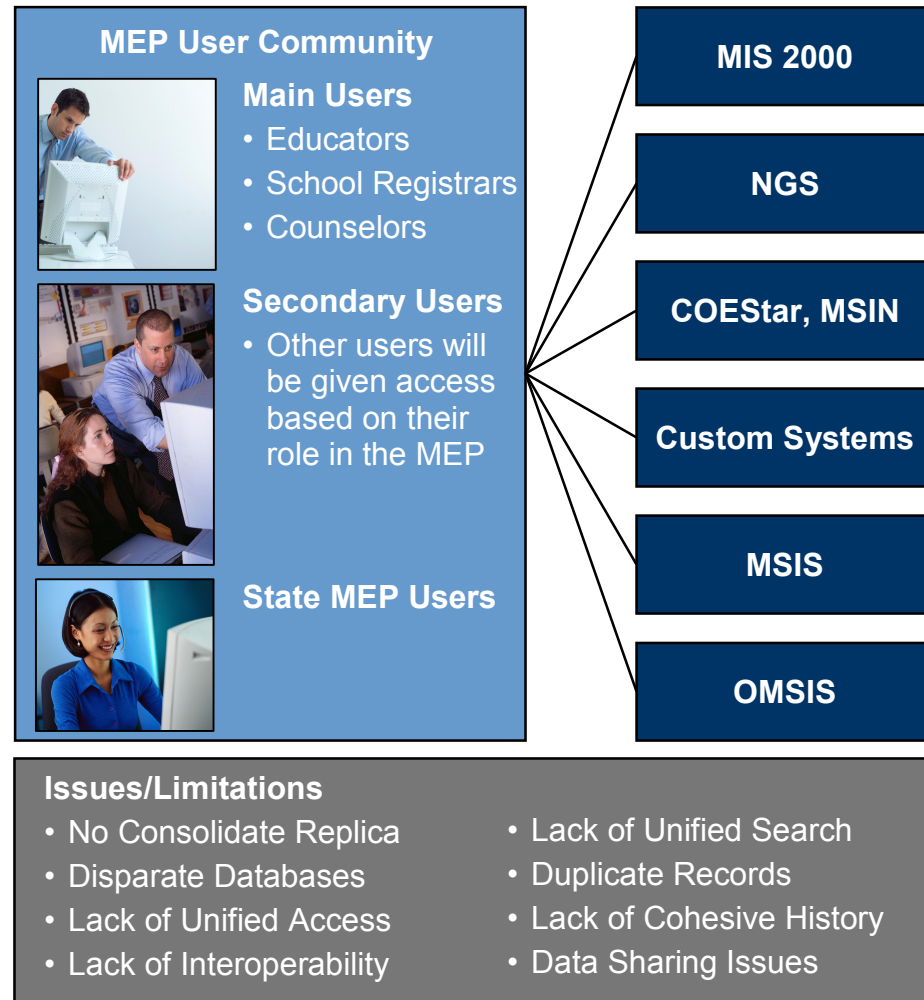
The Need for Migrant Student Records Exchange

- Highly mobile migrant student population
- Students move from State-to-State often without notice
- Timely and accurate educational and health information not always available
- Students placed in incorrect courses or grades
- Students not provided most beneficial MEP services



The Current Records Exchange Environment

- States use disparate migrant student databases to maintain information
- Some States sharing migrant student databases have limited ability to electronically exchange records
- Many States still exchange records via fax or regular mail
- Pre-MSIX there was no electronic system to exchange migrant student records on a national basis





Records Exchange Background

The 2001 No Child Left Behind Act requires ED to:

1. Assist States in developing methods for electronic transfer of records
2. Ensure the linkage of migrant student record systems
3. Utilize existing migrant student systems
4. Establish the minimum data elements (MDE) States must collect and maintain



Records Exchange Initiative Goals

- Goal 1: Create an **electronic exchange** for the transfer of migrant student education and health data amongst the States
- Goal 2: Promote the **use** of the Migrant Student Information Exchange (MSIX)
- 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



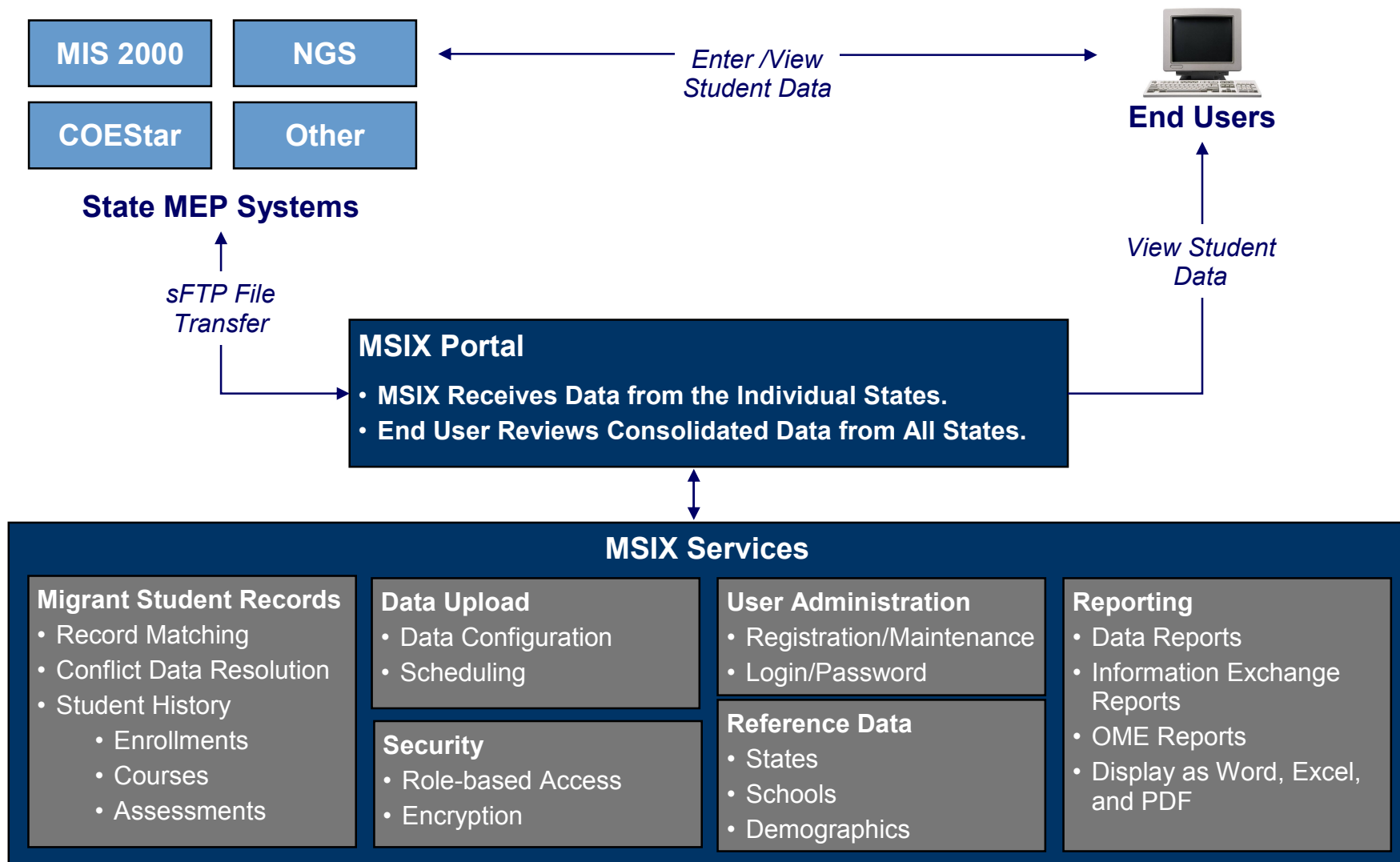
What is MSIX?

MSIX is a web-based portal that links States' migrant student record databases to facilitate the national exchange of migrant students' educational and health information among the States





MSIX Services





MSIX Overview

What MSIX does...

- MSIX produces a single “**consolidated record**” for each migrant child that contains information from each State in which the child was ever enrolled
- MSIX contains the **minimum data elements** necessary for the proper enrollment, grade and course placement, and accrual of credits for migrant children

What MSIX does not do...

- MSIX **does not replace** existing migrant student information systems

The MSIX Solution





MSIX Features

- Retrieve and view student information
 - Print consolidated student record
 - Multiple search parameters
 - Accessible online
 - Printed reports available
- Resolve data conflicts and issues
 - Student Merge process
 - Student Split process
- Notify other jurisdictions of planned student moves
- Maintain user accounts to control access to student data
- Create and maintain regions within states to manage MSIX activities and workflow
- Facilitates access of educational information from multiple states



Automated MSIX Workflows

- **Combine multiple records for the same student**
 - Near Match Resolution for MSIX-identified potential merges
 - User-Initiated Merge to manually combine student records
 - Review and approval processes facilitated by user worklists and automated workflow with email notifications
- **Separate erroneously combined students**
 - User-Initiated Split to manually separate merged students
 - Review and approval processes facilitated by user worklists and automated workflow with email notifications



MSIX User Roles

MSIX User Roles and Responsibilities			
User Role	Description	Functions Allowed	Potential Users
School and District Level Roles			
MSIX Primary	MSIX Primary User can query student records in all states. This role can also initiate the merge and split process for student records in their state.	<ul style="list-style-type: none"> ▪ Search, display, and print student records ▪ Initiate merge and split of student records ▪ Email notification of an arrival or departure of a student ▪ Export student records to a file for load into their State's system 	<ul style="list-style-type: none"> ▪ Guidance Counselor ▪ MEP Data Entry Staff ▪ Recruiter ▪ Registrar ▪ Teachers • School health personnel
MSIX Secondary	MSIX Secondary Users can query student records in only their state.	<ul style="list-style-type: none"> ▪ Search, display, and print student records for students in their state ▪ Generate Data and Information Exchange Reports ▪ Email notification of an arrival or departure of a student ▪ Export student records to a file for load into their State's system 	<ul style="list-style-type: none"> ▪ State MEP Administrators or Directors
District Data Administrator	District Data Administrators can validate or reject near matches, merges and splits of student records. The role can also initiate the merge and split process for student records in their district.	<ul style="list-style-type: none"> ▪ Search, display, and print student records ▪ Initiate merge and split of student records ▪ Validate or reject record near matches, merges and splits ▪ Resolve data quality issues ▪ Email notification of an arrival or departure of a student ▪ Export student records to a file for load into their State's system 	<ul style="list-style-type: none"> ▪ 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. The role can initiate the merge and split process for student records in their region. This role will also serve as the secondary point of contact for escalation issues.	<ul style="list-style-type: none"> ▪ Search, display, and print student records ▪ Generate Data and Information Exchange Reports ▪ Initiate merge and split of student records ▪ Validate or reject record near matches, merges and splits ▪ Resolve data quality issues ▪ Email notification of an arrival or departure of a student ▪ Export student records to a file for load into their State's system 	<ul style="list-style-type: none"> ▪ State MEP Administrators ▪ MEP Data Entry Staff

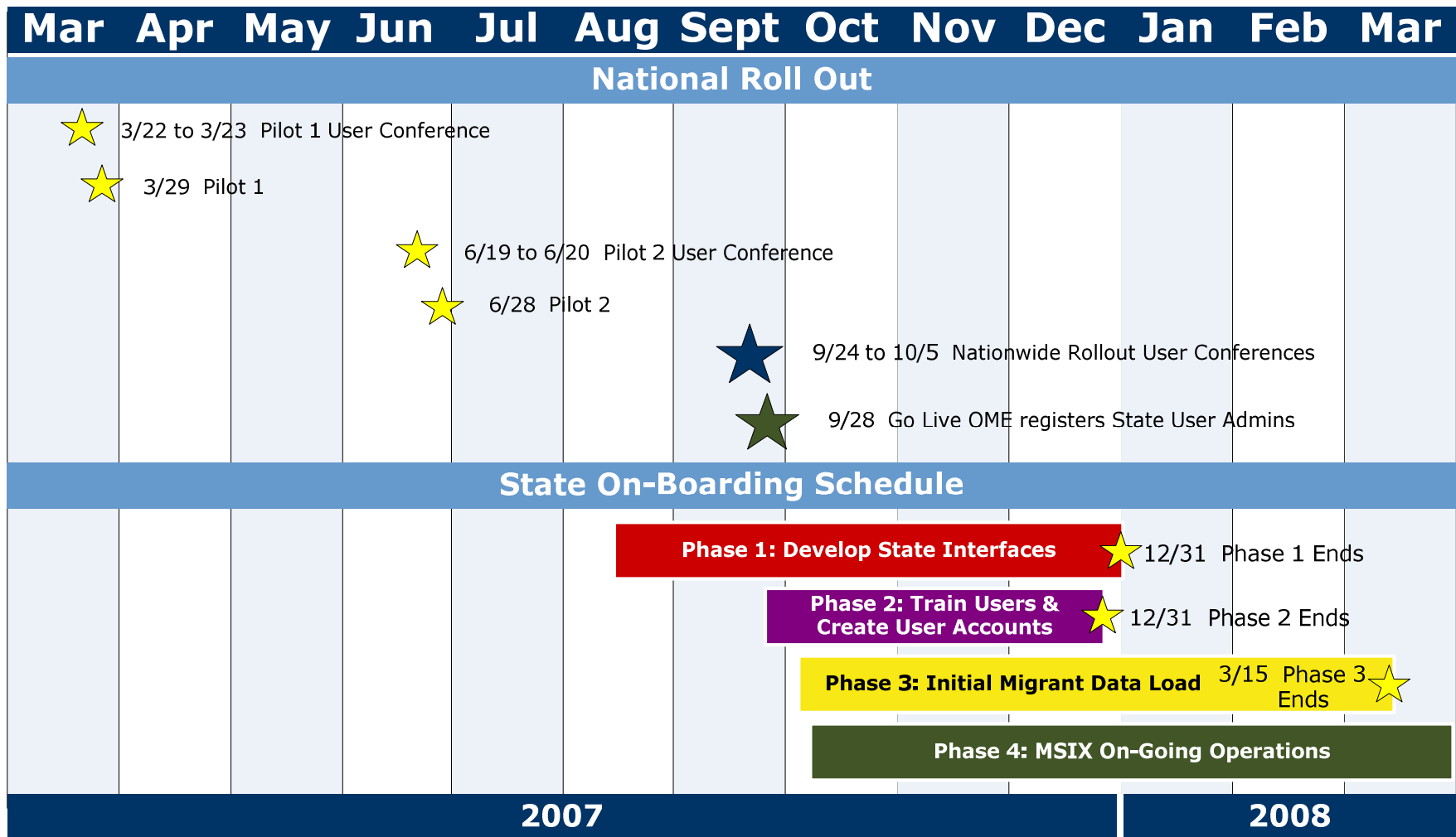


MSIX User Roles

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User Role	Description	Functions Allowed	Potential Users
Regional User Administrator	Regional User Administrators establish and manage user accounts for users in their region.	<ul style="list-style-type: none"> ▪Create user accounts ▪Assign role(s) ▪Update user account information ▪Deactivate user accounts ▪Reset passwords 	<ul style="list-style-type: none"> ▪State identified
State Level Roles			
State Data Administrator	State Data Administrators can validate or reject near matches, merges and splits of student records. The role can initiate the merge and split process for student records in their state. They can also resolve data quality issues and serve as the primary point of contact for escalation issues.	<ul style="list-style-type: none"> ▪Search, display, and print student records ▪Generate data and Information Exchange 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 a file for load into their State's system 	<ul style="list-style-type: none"> ▪State MEP Administrators ▪MEP Data entry staff
State User Administrator	State User Administrators establish and manage user accounts for users in their state.	<ul style="list-style-type: none"> ▪Create user accounts ▪Assign role(s) ▪Update user account information ▪Deactivate user accounts ▪Reset passwords 	<ul style="list-style-type: none"> ▪State identified
State Region Administrator	State Region Administrator establishes and maintains the regional structure and associated districts for states which choose to use regions.	<ul style="list-style-type: none"> ▪Enable and disable regional structure ▪Create new regions ▪Associate districts to regions ▪Edit regions 	<ul style="list-style-type: none"> ▪State MEP Administrators ▪MEP Data entry staff



MSIX Implementation Timeline



Online Tour of MSIX



MSIX Training Materials and Support Tools





Online Training Modules

Welcome to MSIX training

▶ Training Menu

The MSIX training objective

- Educate you on how to use MSIX in conjunction with your job.

Training Agenda

- Goals and Purpose of MSIX
- MSIX Role and Responsibilities
- Navigational Elements
- Login and Logout of MSIX
- How to Use MSIX
- Interactive Lessons



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MSIX Trainer's Toolkit

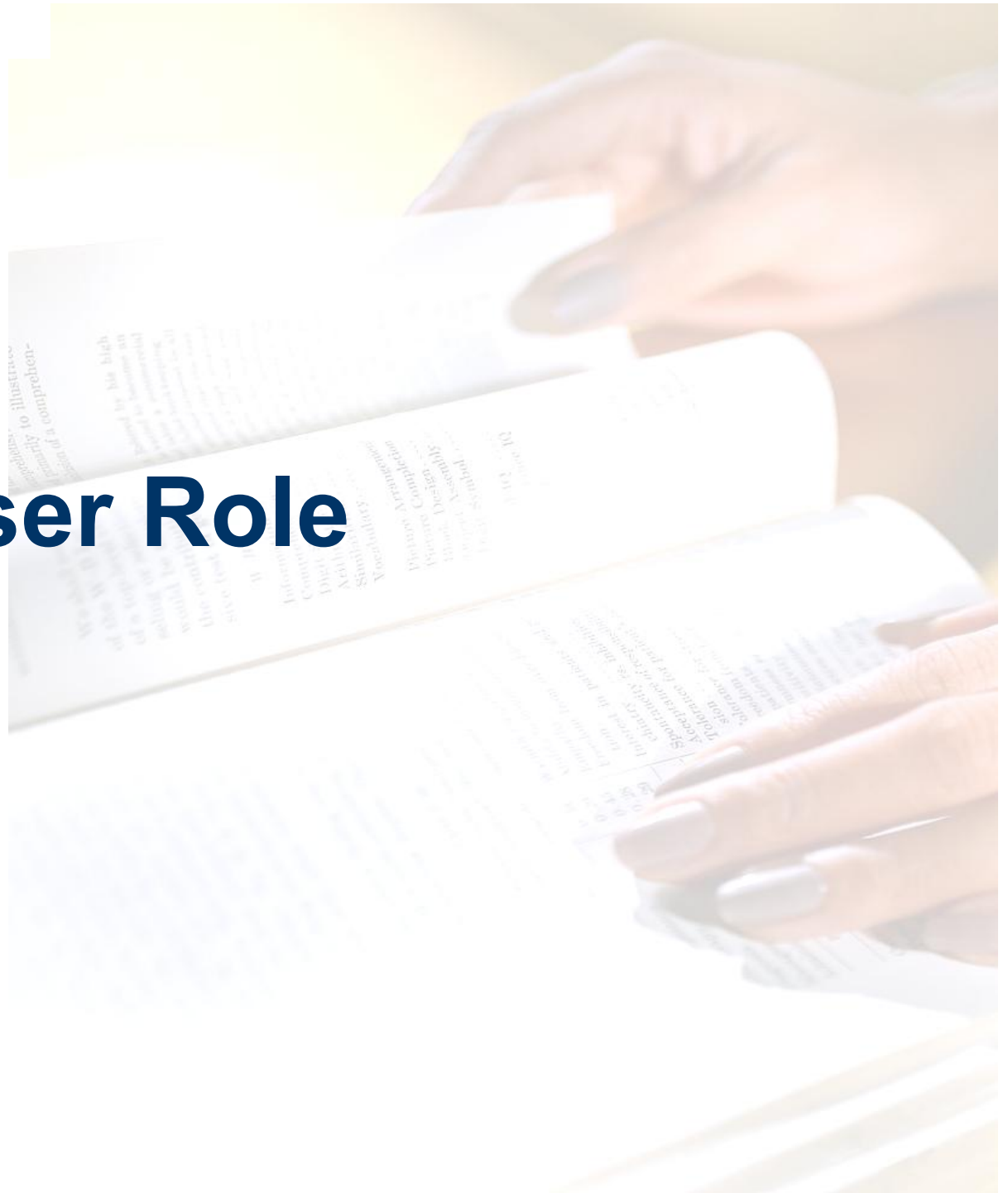
- MSIX User Access Guide & Application
- MSIX Rules of Behavior
- MSIX Quick Reference Guide
- MSIX User Manual
- MSIX User Administration Guide
- MSIX Frequently Asked Questions
- Toolkit Summary



MSIX Training Support Tools

- MSIX Online Help
- MSIX Help Desk
 - Email: msixsupport@deloitte.com
 - Call: 1-866-878-9525
- User Conference Materials
 - Conference materials available on CD in binder
- Additional MSIX Conferences
 - Schedule to be announced
- MSIX Training Environment
 - Available in December
- Trainer's Corner
 - Available from MSIX Login Page
 - Online resources for State Trainers
 - MSIX Trainer's Toolkit
 - Conference Schedule
 - Contact Information
 - Conference Exercises
- Minimum Data Elements
- Letters to State Officials

Primary User Role





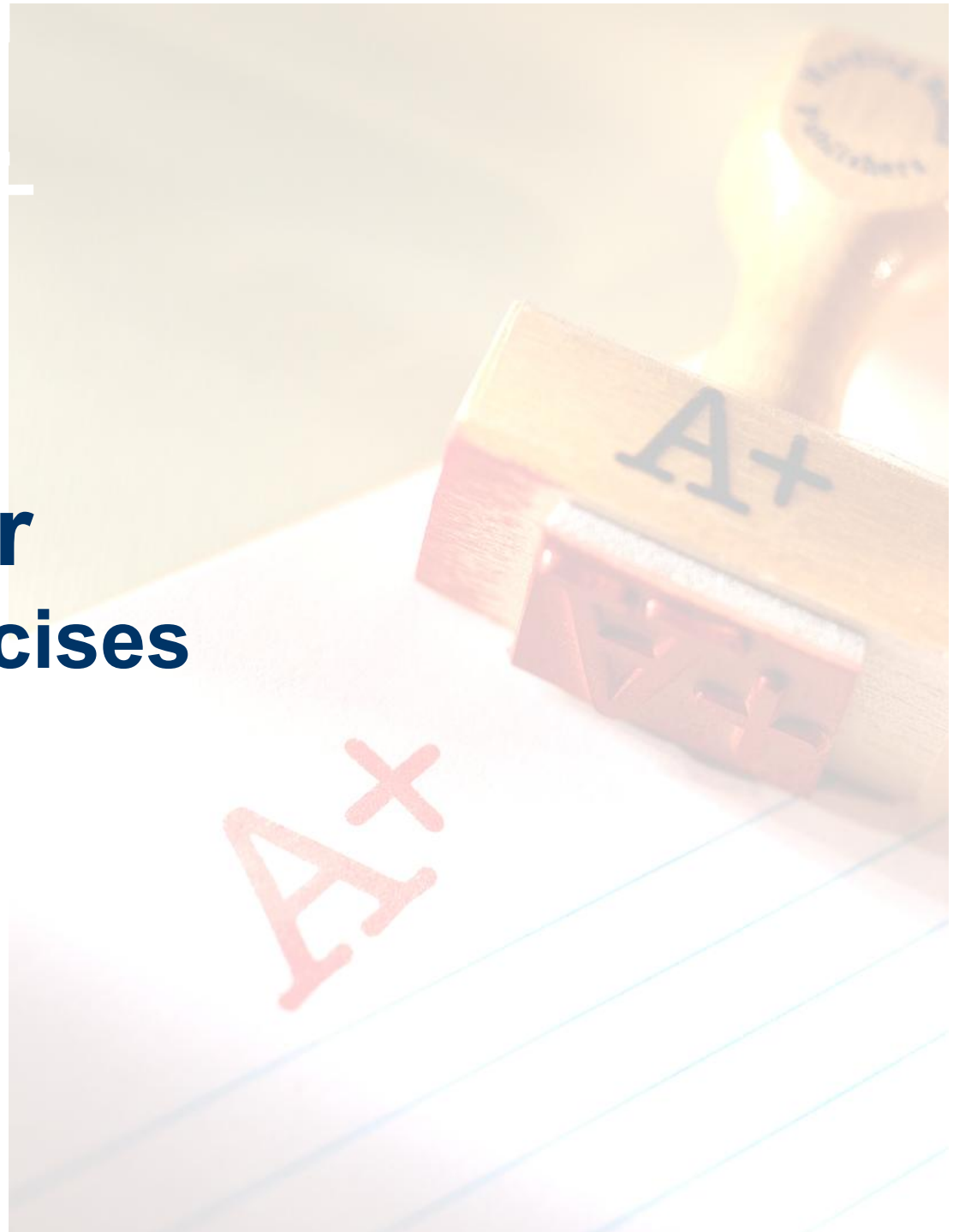
Primary User Role Overview

- Most common MSIX User Role
- Potential Users
 - Guidance Counselor
 - MEP Data Entry Staff
 - Recruiter
 - Registrar
 - Teachers
- Key Functions
 - Search, display, and print student records
 - Initiate merge and split of student records
 - Email notification of an arrival or departure of a student
 - Export student records to a file for upload into their State's system (States to determine how to utilize this function)

Primary User Online Training



Primary User Hands-on Exercises



Data Administrator Role



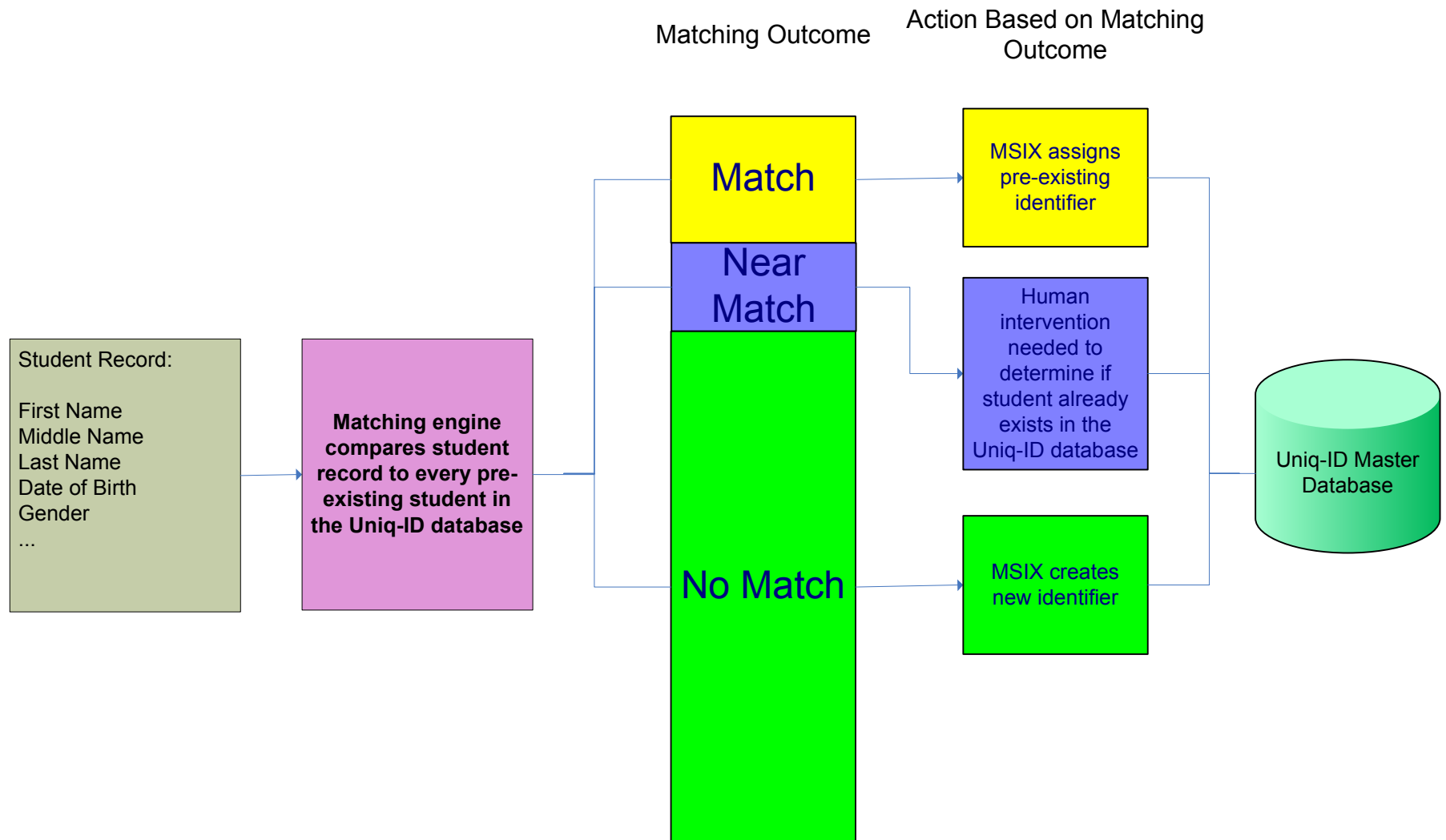


Data Administrator Role Overview

- 3 Data Administrator Levels
 - State Data Administrator – Minimum 1 per State required
 - Regional Data Administrator – State Option
 - District Data Administrator – State Option
- Potential Users
 - State MEP Administrators
 - MEP Data entry staff
- Key Functions
 - Search, display, and print student records
 - Generate data and Information Exchange Reports
 - Initiate merge and split of student records
 - Validate or reject record near matches, merges, and splits
 - Resolve data quality issues
 - Email notification of an arrival or departure of a student
 - Export student records to a file for upload into their State's system

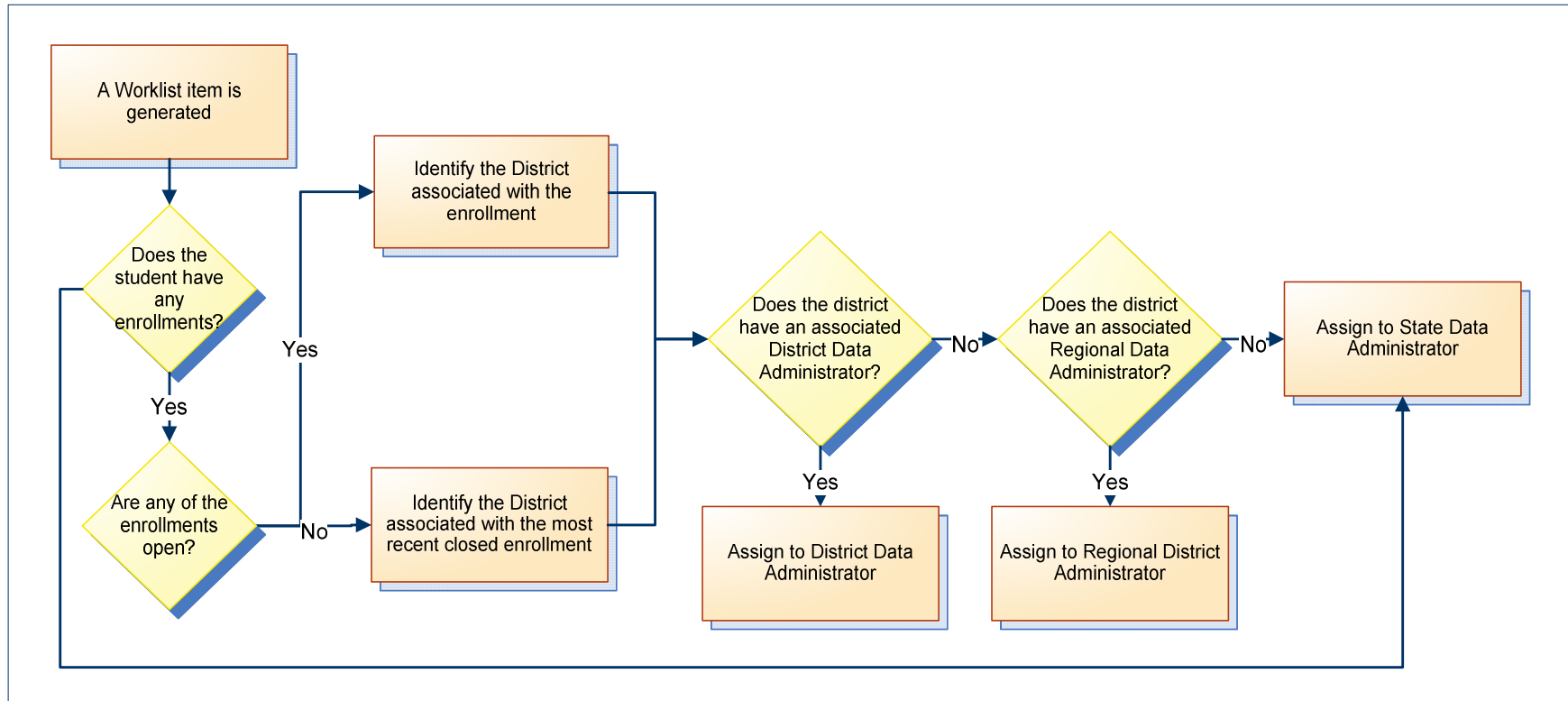


Uniq-ID Student Record Match



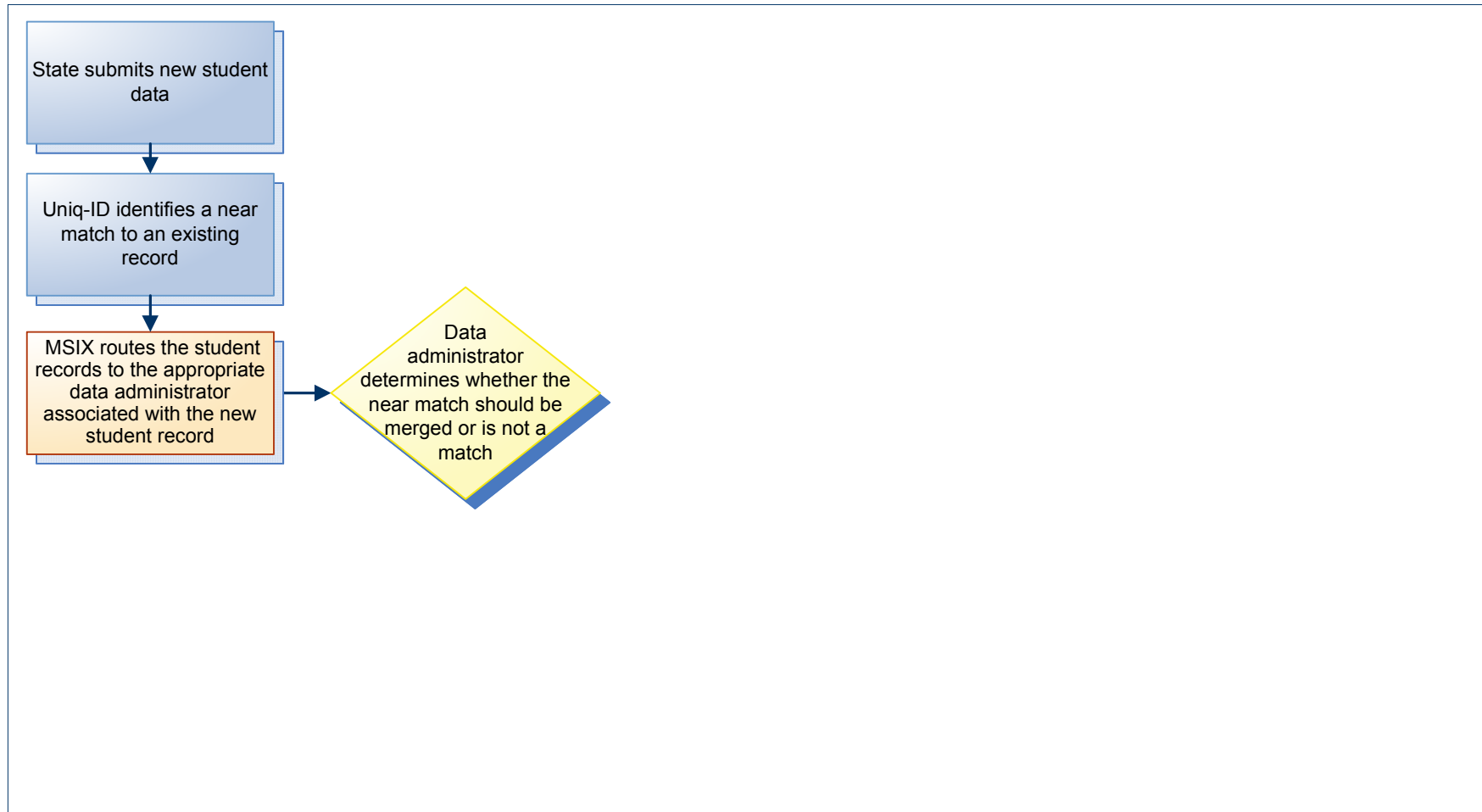


Worklist Assignment and Escalation





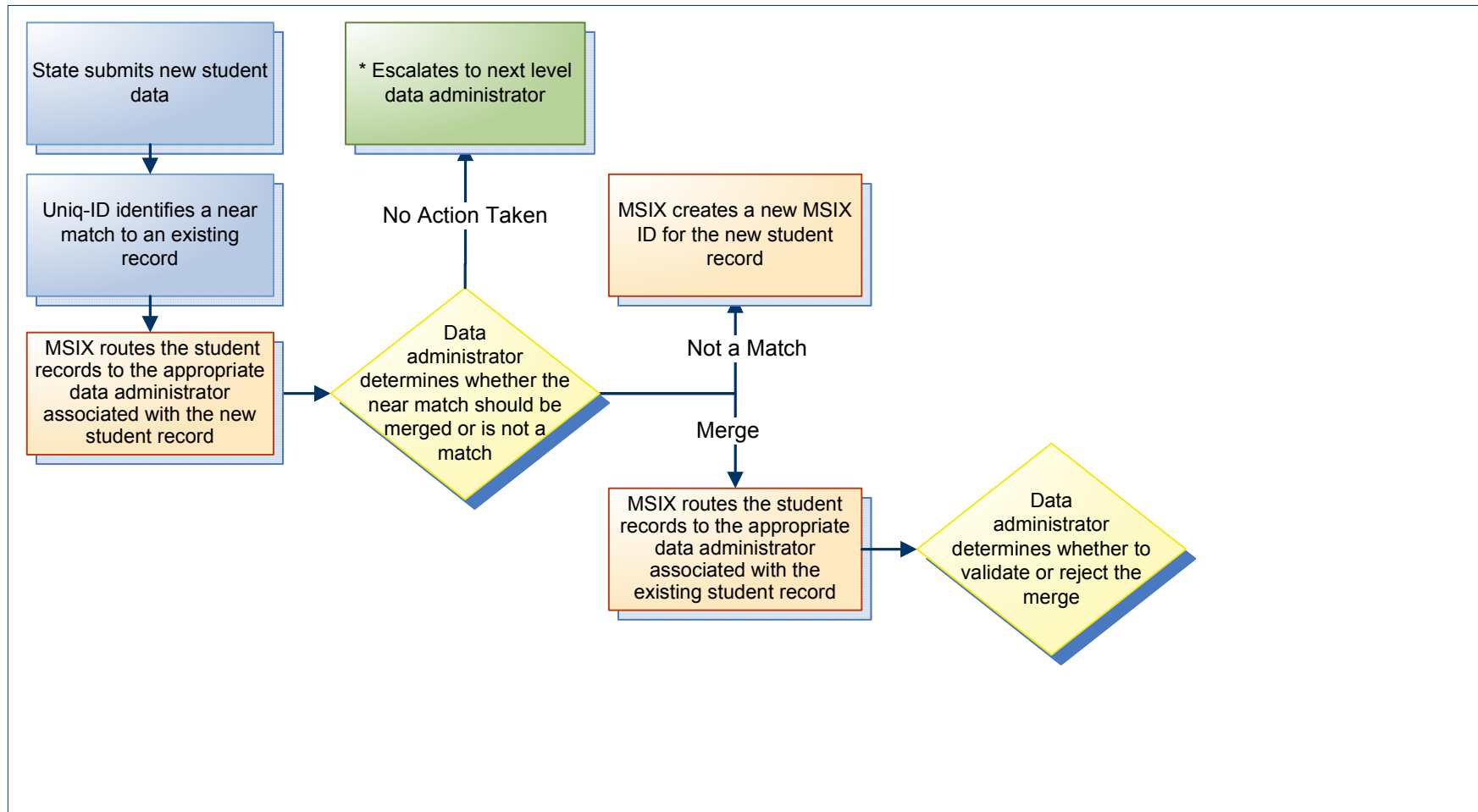
Workflow for Near Match Resolution



* Escalation Paths
District Data Administrator (DDA) > Regional Data Administrator (RDA) > State Data Administrator (SDA)



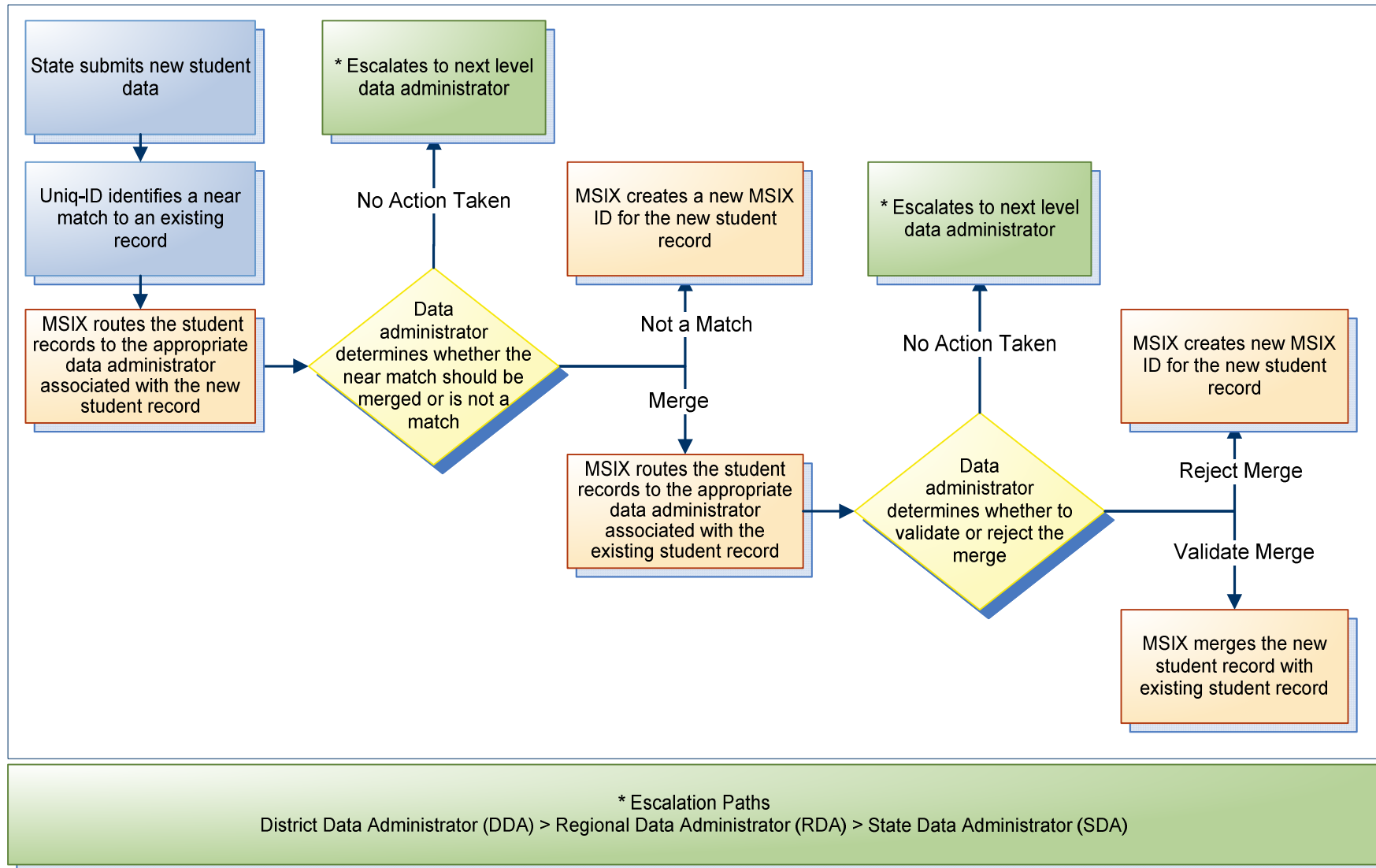
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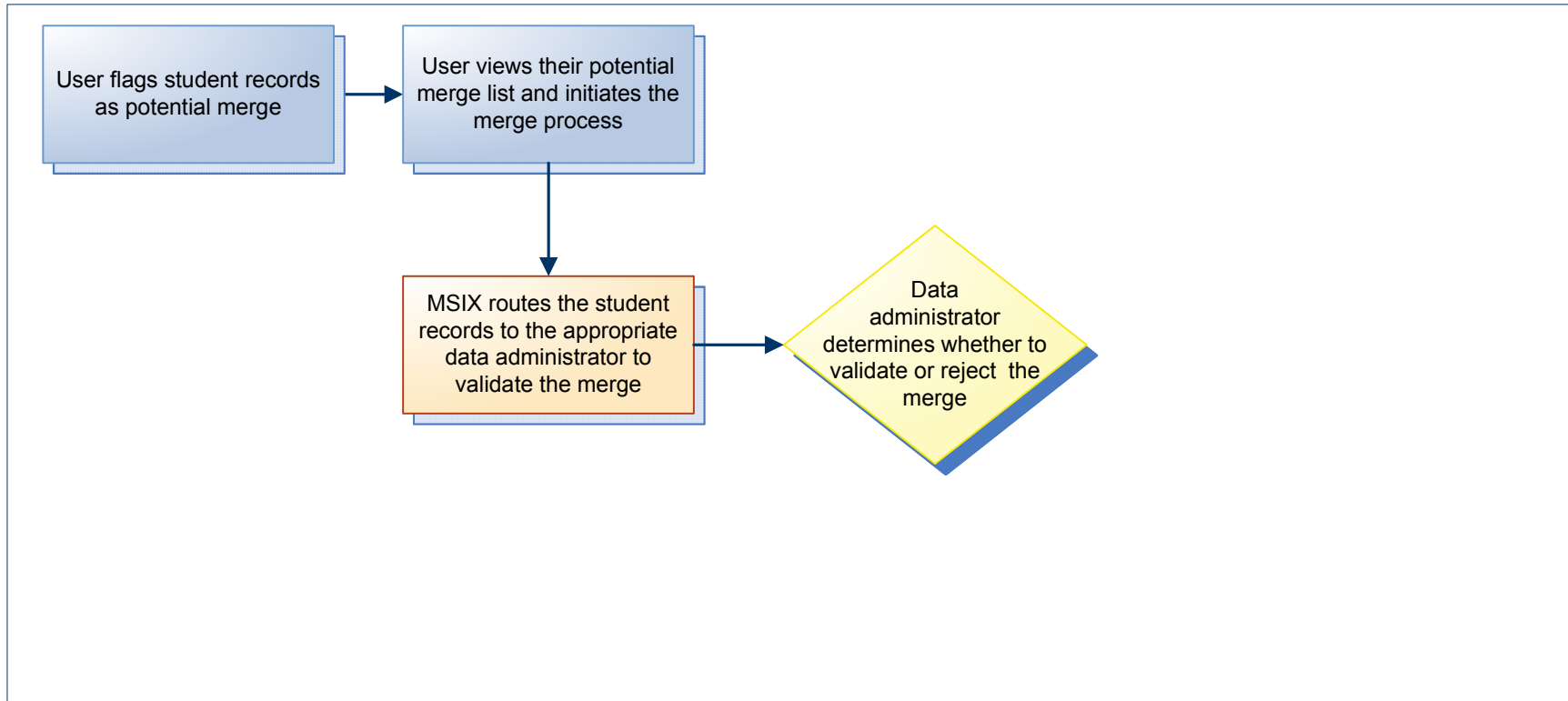


Workflow for Near Match Resolution





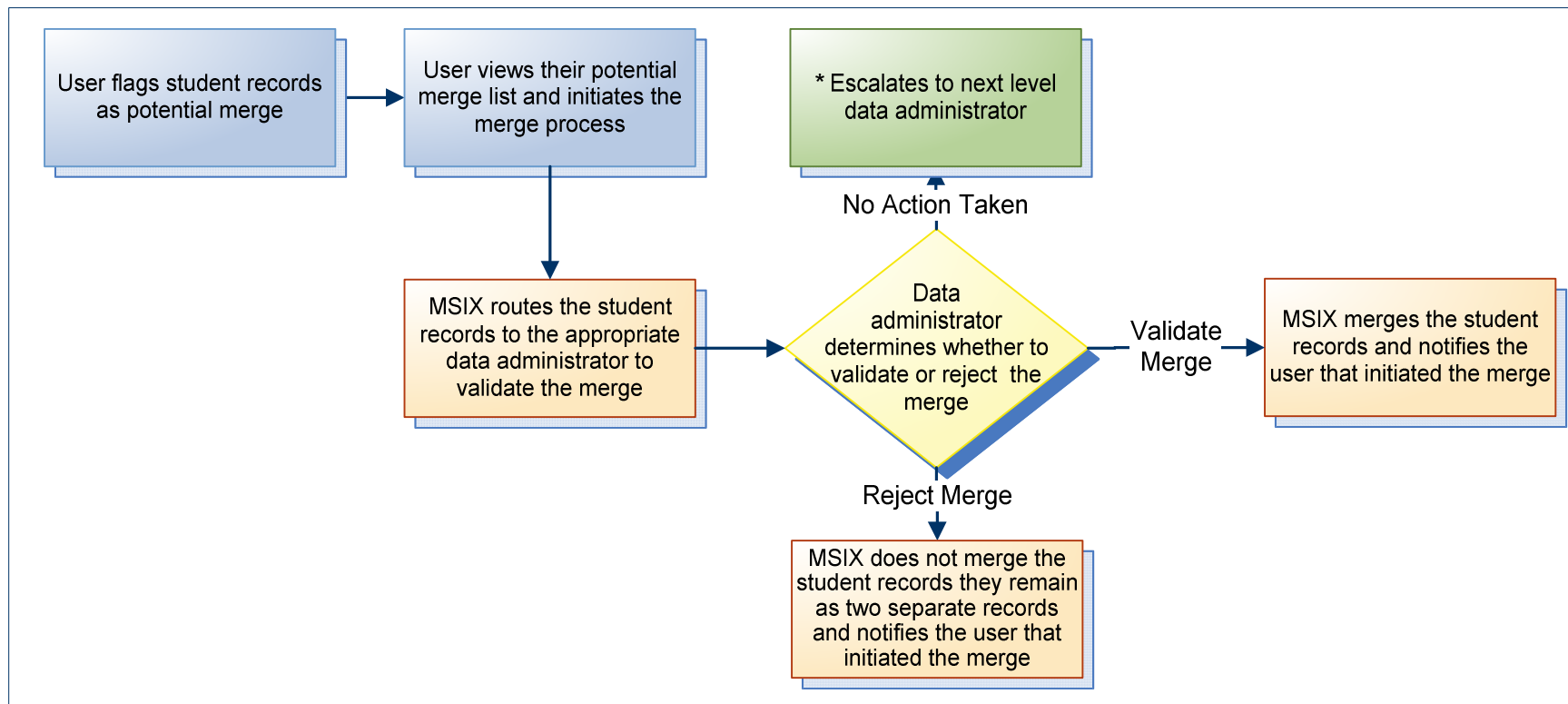
Workflow for User Initiated Merge



* Escalation Paths
District Data Administrator (DDA) > Regional Data Administrator (RDA) > State Data Administrator (SDA)



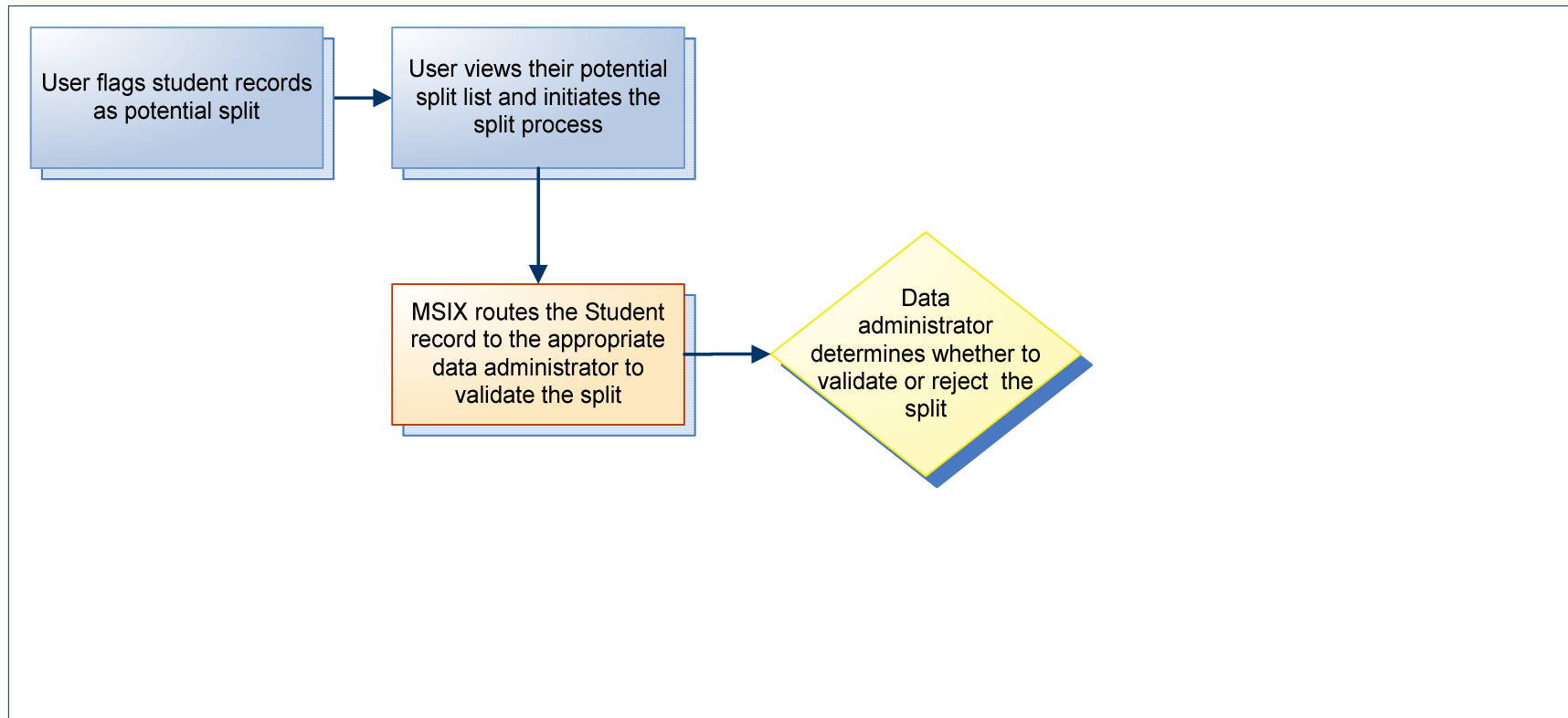
Workflow for User Initiated Merge



* Escalation Paths
District Data Administrator (DDA) > Regional Data Administrator (RDA) > State Data Administrator (SDA)



Workflow for Splitting Student Records

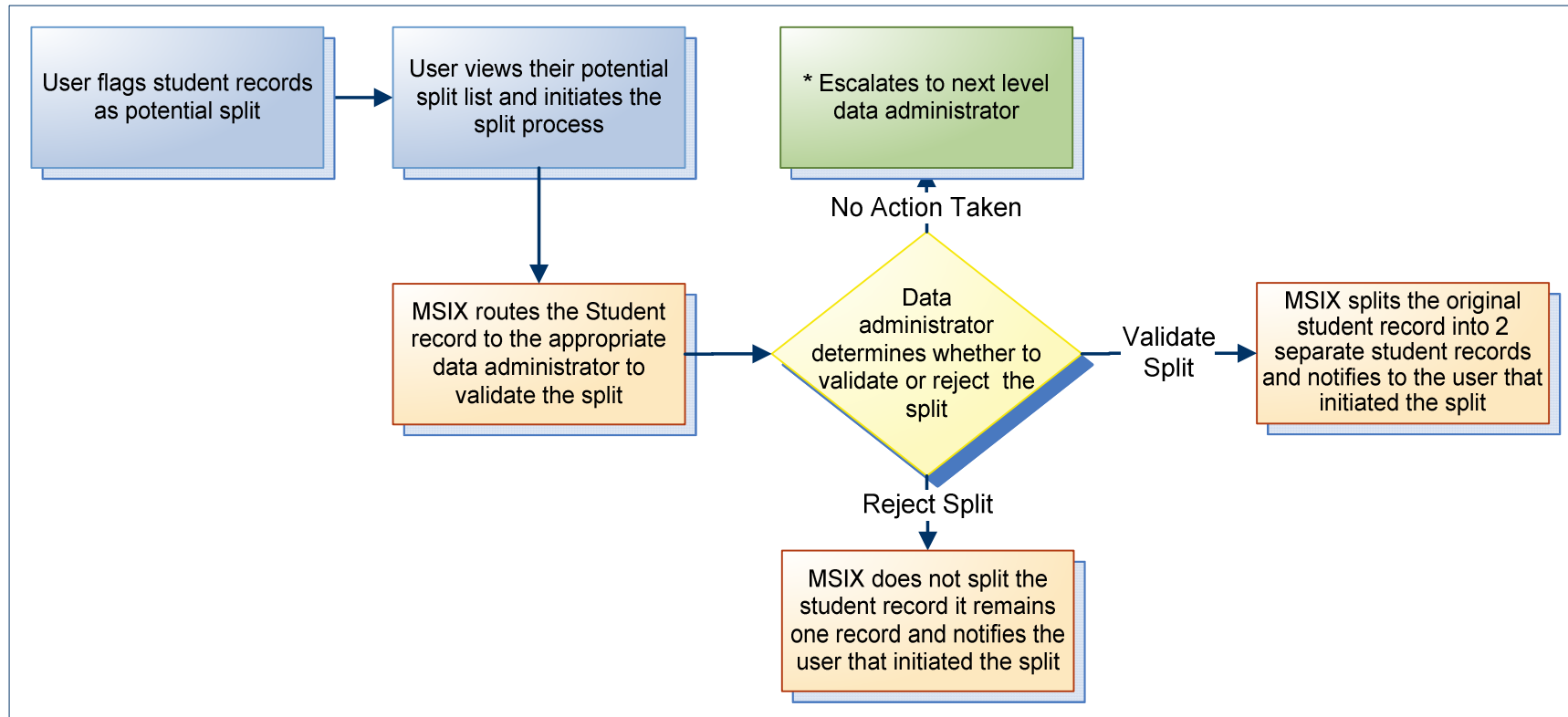


* Escalation Paths

District Data Administrator (DDA) > Regional Data Administrator (RDA) > State Data Administrator (SDA)



Workflow for Splitting Student Records



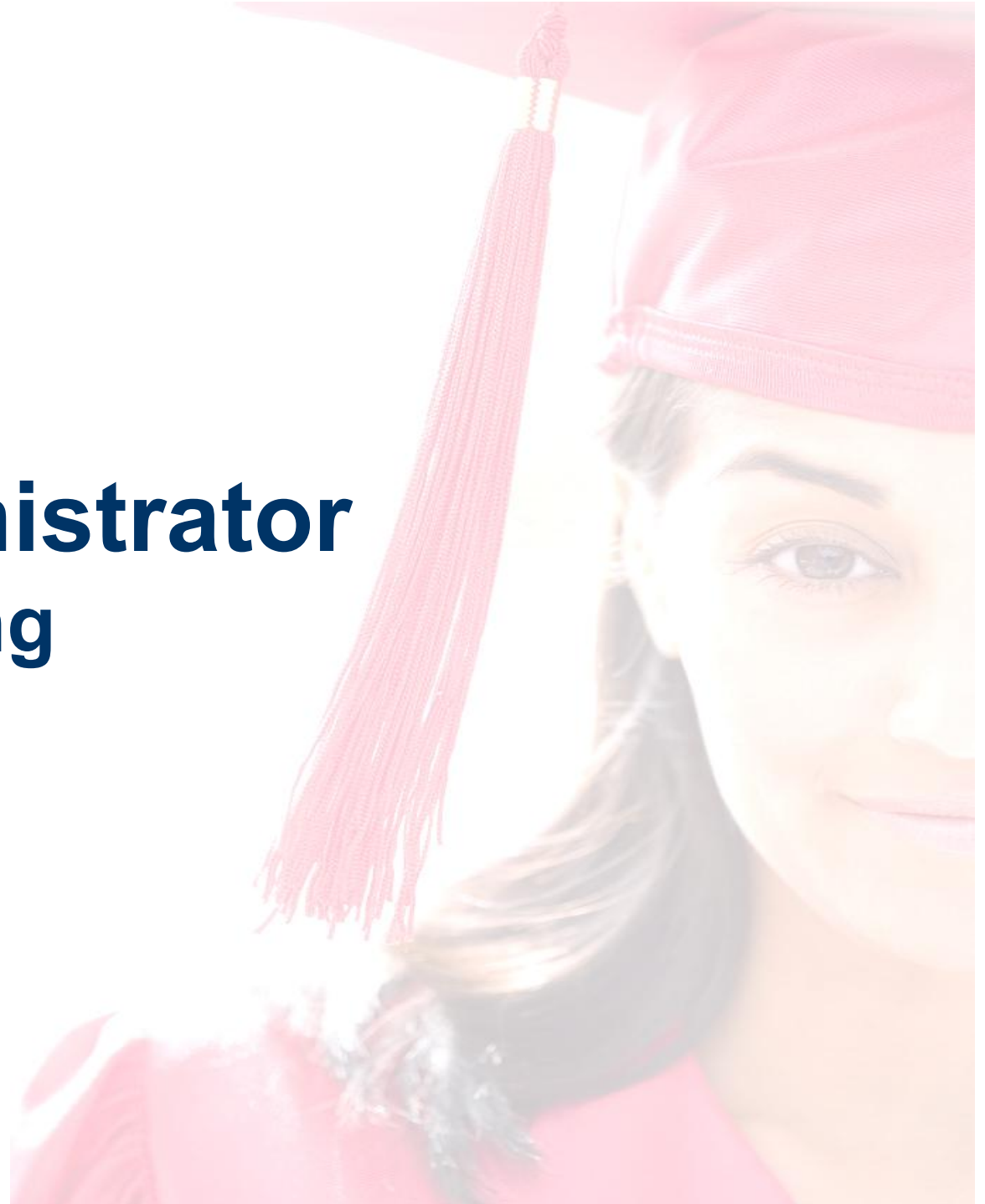
* Escalation Paths

District Data Administrator (DDA) > Regional Data Administrator (RDA) > State Data Administrator (SDA)

Data Administrator Demonstration



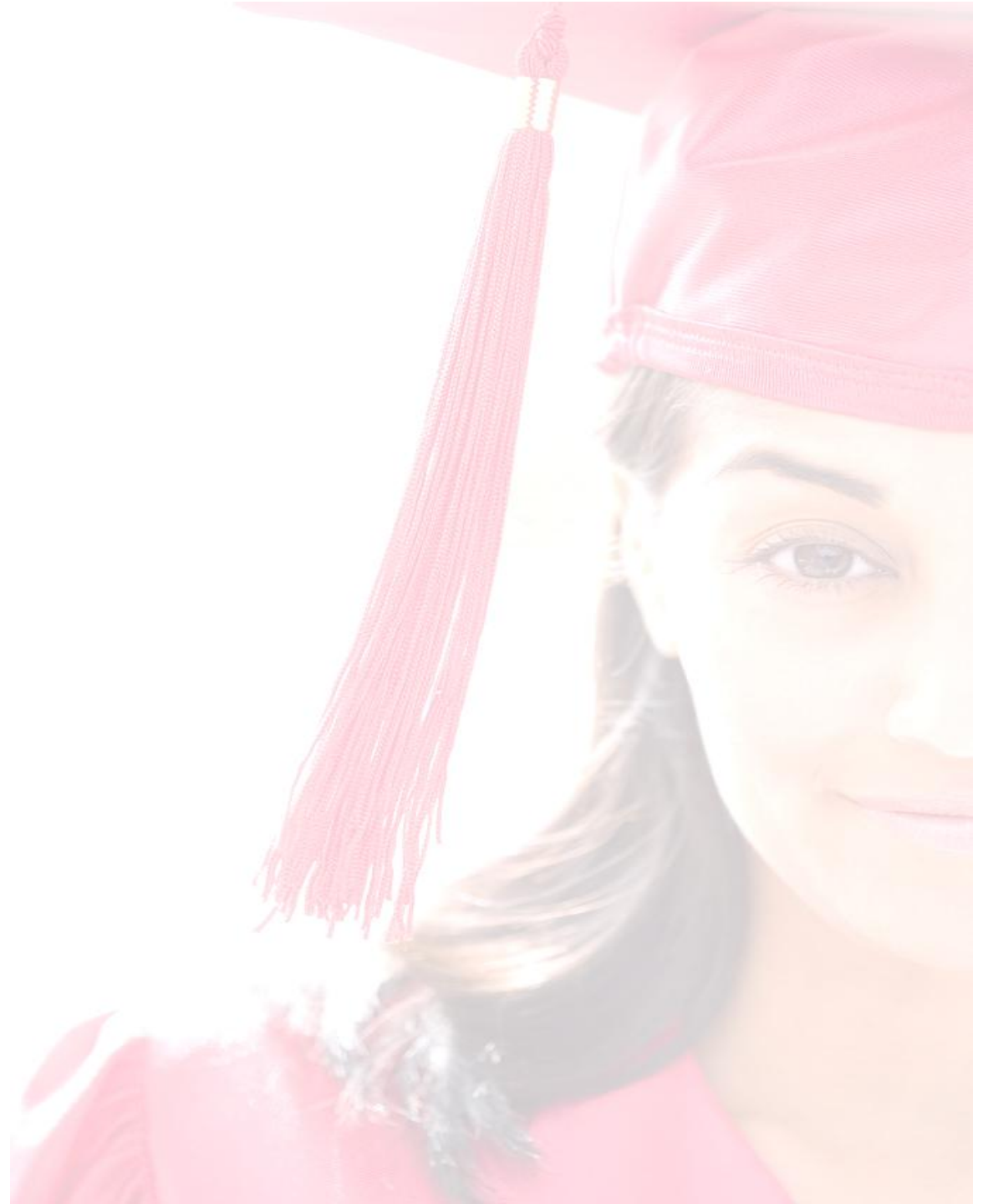
Data Administrator Online Training



Wrap-up Question and Answer Session



DAY TWO





Conference Schedule – Day 2

Time	Agenda Item	Description
DAY 2		
9:00 – 9:30	Discussion	General debrief of Day 1 activities. Group discussion of MSIX functionality and walk through specific issues, if necessary. Review Day 2 Agenda. Detailed discussion of implementation schedule.
9:30 – 9:45	User Administrator Role	Overview of the User Administrator Role
9:45 – 10:15	User Administrator – Online Training	Self-guided walk-through of User Administrator online training module
10:15 – 10:45	User Administrator - Hands-on Training	Hands-on scenarios to: Create New User Accounts, Update Existing User Accounts
10:45 – 11:00	BREAK	
11:00 – 11:15	State Region Administrator Role	Overview of the State Region Administrator Role
11:15 – 11:45	State Region Administrator - Online Training	Self-guided walk-through of State Region Administrator online training module
11:45 – 12:15	State Region Administrator – Hands-on Training	Hands-on scenarios to: Create Regions, Modify Regions
12:15 - 1:15	LUNCH	
1:15 – 1:45	MSIX Training Strategy	Overview of the MSIX training approach and review available training resources
1:45 - 2:00	Q&A and Wrap-Up	Group discussion of MSIX functionality based on questions that arise during the conference, next steps. Closing Remarks

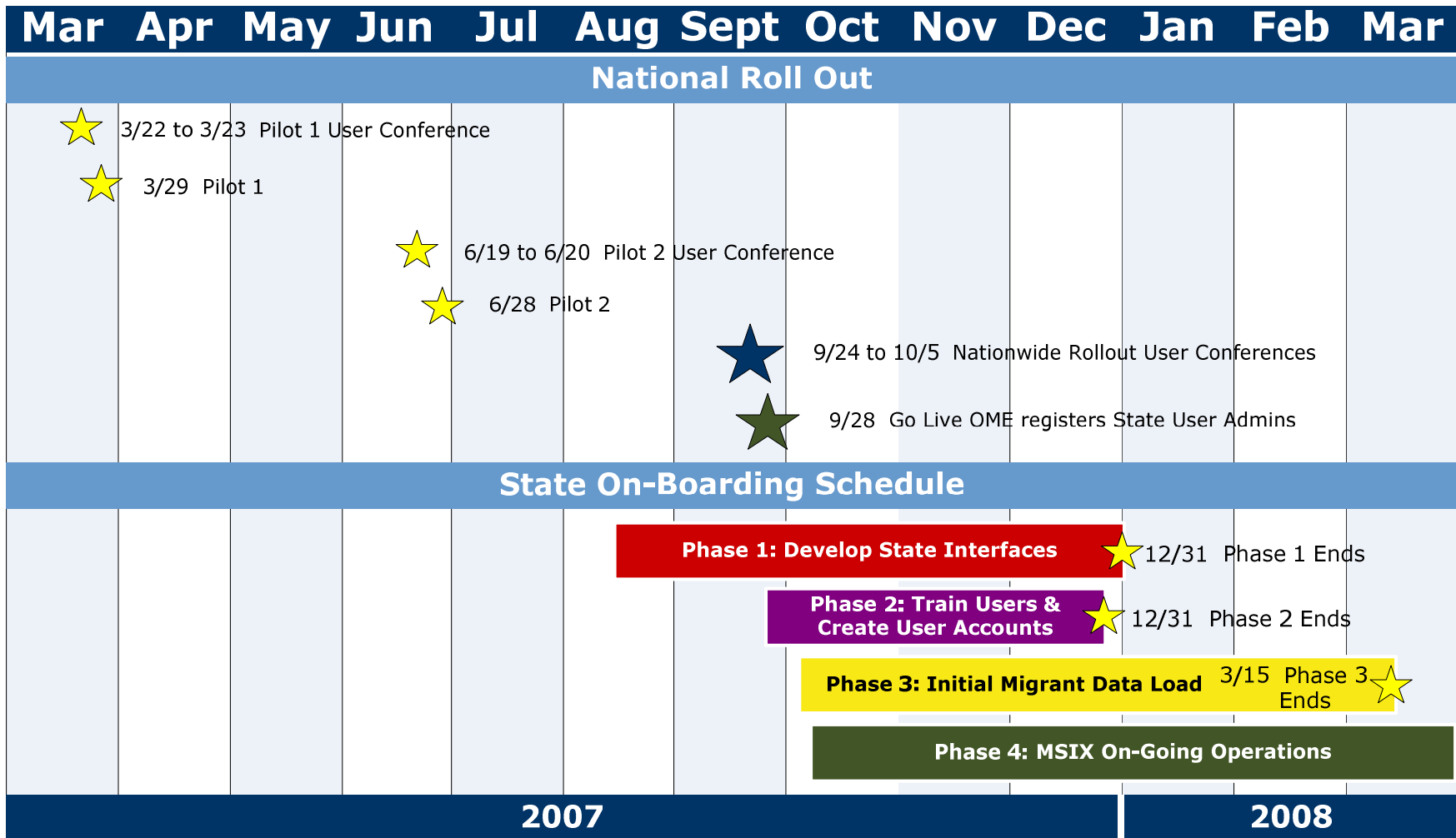


Day 1 Review

- MSIX Training Tools
 - Online Training & Help
 - Trainer's Toolkit
 - MSIX Help Desk
 - User Conference Materials
- MSIX Functionality
 - Primary User Role
 - Data Administrator Role
- Questions and Discussion??



MSIX Implementation Overview





State On-Boarding Phases

PHASE 1 Deploy State Interfaces

Begin anytime

- Provide State MEP system information by completing State Profile
- Confirm State Tech Lead
- Schedule Data File Tests
- Test State Interface

PHASE 2 Train Users & Create User Accounts

Begin after Sept. 24, 2007

1. Attend MSIX Regional Training
2. Designate State User Admin
3. State User Admin Training
4. Create Regions (as appropriate)
5. User Training
6. Create User Accounts (as appropriate)



State On-Boarding Phases

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1. Attend MSIX Regional Training
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4. Create Regions (as appropriate)
5. User Training
6. Create User Accounts (as appropriate)

PHASE 3 Initial Migrant Data Load

Begin after completing Phases 1 and 2

- Provide migrant data file
- Test migrant data file for proper formatting
- Load migrant data file into MSIX
- Report results of loading migrant data file
- Verify that the date records loaded correctly



State On-Boarding Phases

PHASE 1 Deploy State Interfaces

Begin anytime

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PHASE 3 Initial Migrant Data Load

Begin after completing Phases 1 and 2

- Provide migrant data file
- Test migrant data file for proper formatting
- Load migrant data file into MSIX
- Report results of loading migrant data file
- Verify that the date records loaded correctly

PHASE 4 MSIX On-Going Operations

Begin after completing Phase 3

- Add/maintain user accounts
- Provide migrant data file updates
- Process migrant data file updates
- Communicate MSIX rollout status
- Provide support to MSIX users
- Train MSIX Users

States must complete Phases 1-3 to begin the MSIX on-going operations phase

User Administrator Role





User Administrator Role Overview

- 3 User Administrator Levels
 - OME User Administrator – Creates 1 State User Administrator for each State
 - State User Administrator – Minimum 1 per state required
 - Regional User Administrator – State Option
- Potential Users
 - State MEP Administrators
- Key Functions
 - Create user accounts
 - Assign user role(s)
 - Update user account information
 - Deactivate user accounts
 - Reset passwords (*MSIX help desk does not reset passwords*)



MSIX Help Desk

Help Desk does...	Help Desk does not...
<ul style="list-style-type: none">• provide support to MSIX users• answer questions about MSIX• receive and coordinate resolution of MSIX issues.	<ul style="list-style-type: none">• reset passwords• create new users• deactivate or disable existing users



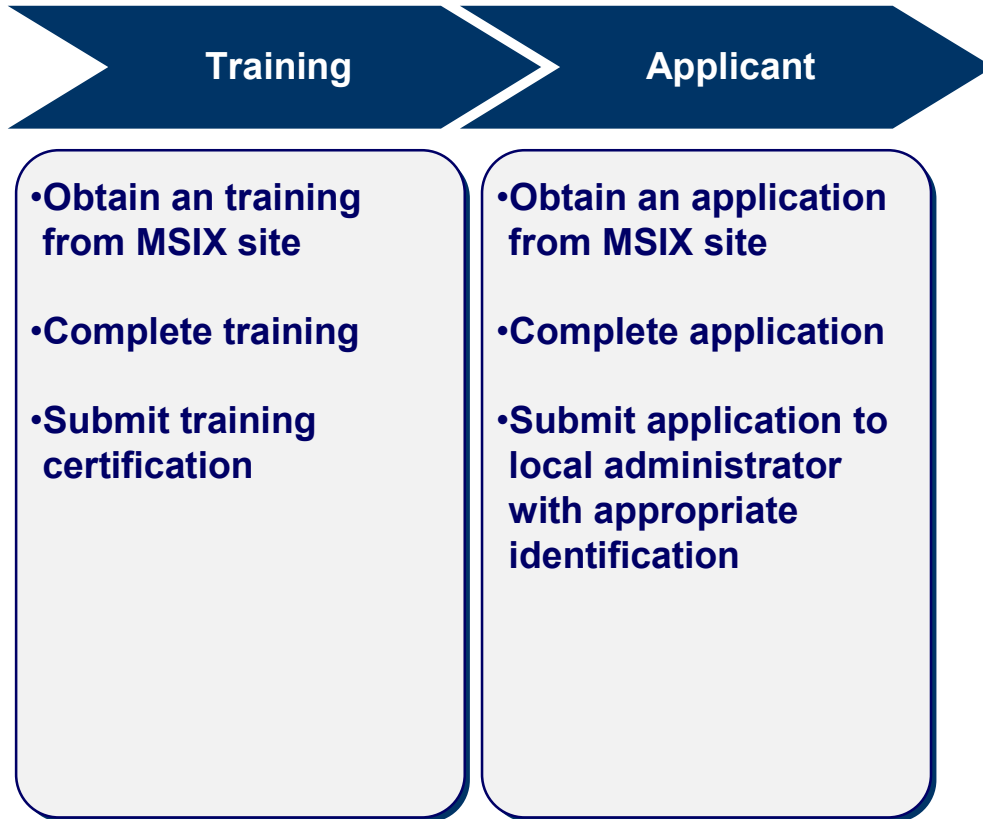
User Application Process

Training

- Obtain an training from MSIX site
- Complete training
- Submit training certification

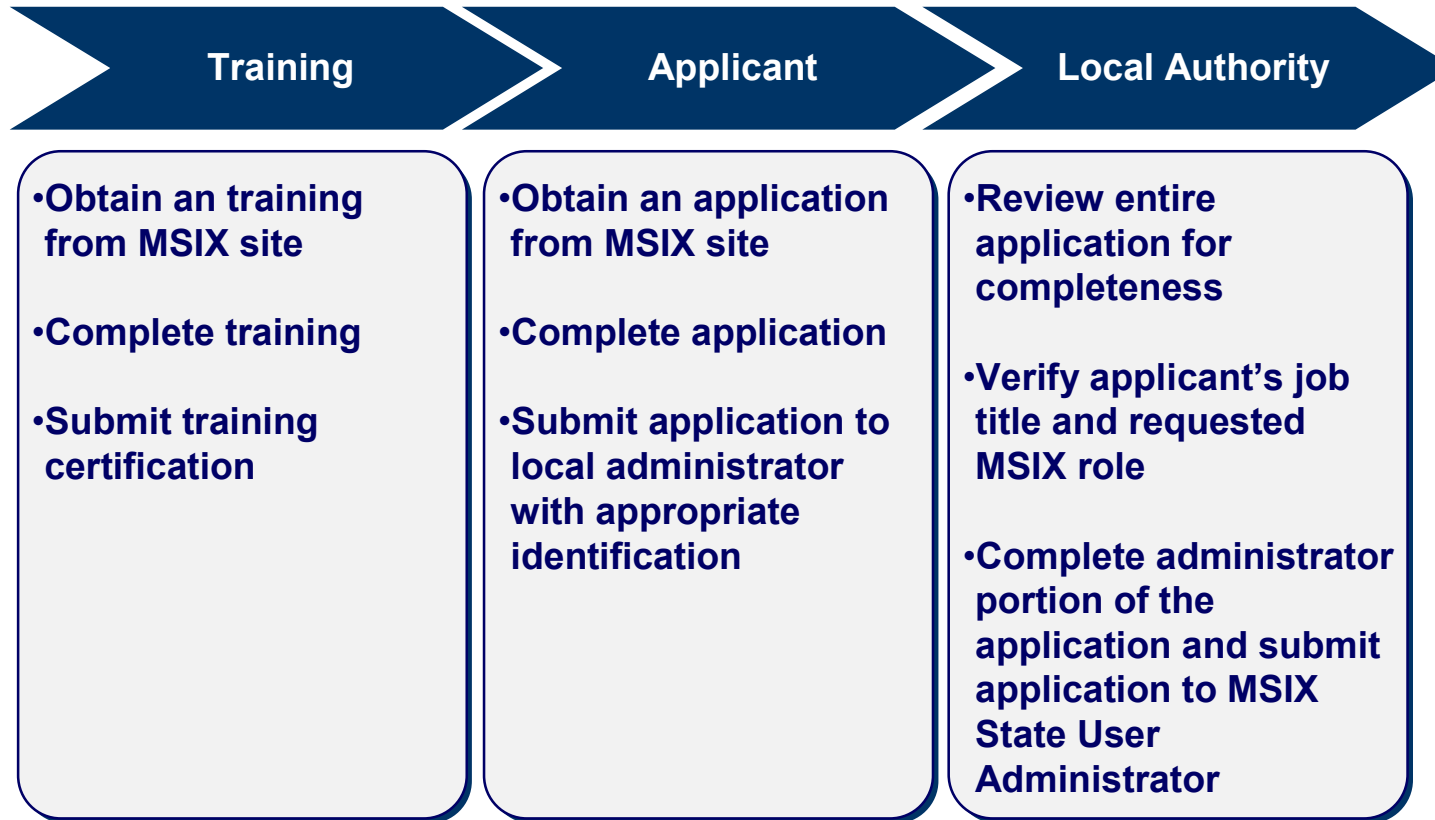


User Application Process



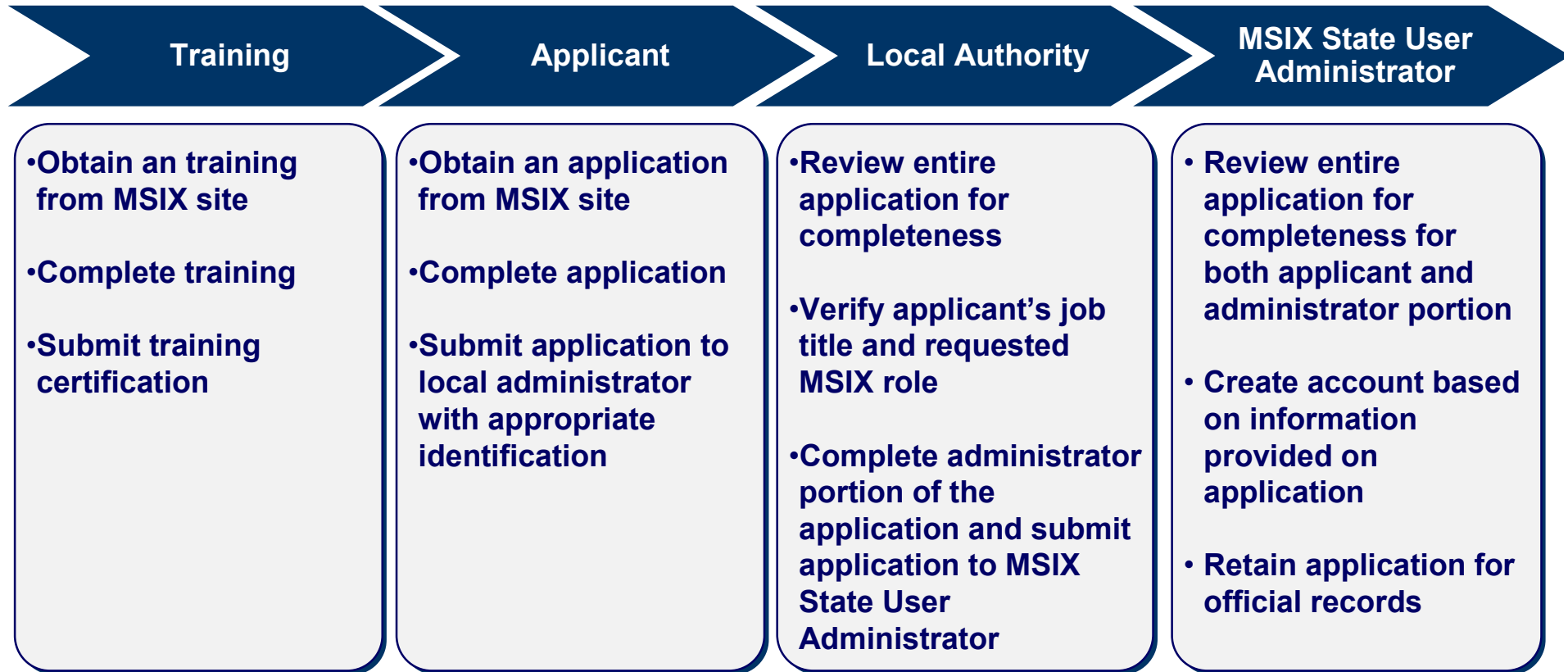


User Application Process





User Application Process



- Additional Resources
 - User Administration Guide
 - User Access Guide and Application



MSIX User Roles

MSIX User Roles and Responsibilities			
User Role	Description	Functions Allowed	Potential Users
School and District Level Roles			
MSIX Primary	MSIX Primary User can query student records in all states. This role can also initiate the merge and split process for student records in their state.	<ul style="list-style-type: none"> ▪ Search, display, and print student records ▪ Initiate merge and split of student records ▪ Email notification of an arrival or departure of a student ▪ Export student records to a file for load into their State's system 	<ul style="list-style-type: none"> ▪ Guidance Counselor ▪ MEP Data Entry Staff ▪ Recruiter ▪ Registrar ▪ Teachers • School health personnel
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Regional Level Roles			
Regional Data Administrator	Regional Data Administrators can validate or reject near matches, merges and splits of student records. The role can initiate the merge and split process for student records in their region. This role will also serve as the secondary point of contact for escalation issues.	<ul style="list-style-type: none"> ▪ Search, display, and print student records ▪ Generate Data and Information Exchange Reports ▪ Initiate merge and split of student records ▪ Validate or reject record near matches, merges and splits ▪ Resolve data quality issues ▪ Email notification of an arrival or departure of a student ▪ Export student records to a file for load into their State's system 	<ul style="list-style-type: none"> ▪ State MEP Administrators ▪ MEP Data Entry Staff



MSIX User Roles

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User Role	Description	Functions Allowed	Potential Users
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State Level Roles			
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State Region Administrator	State Region Administrator establishes and maintains the regional structure and associated districts for states which choose to use regions.	<ul style="list-style-type: none"> ▪Enable and disable regional structure ▪Create new regions ▪Associate districts to regions ▪Edit regions 	<ul style="list-style-type: none"> ▪State MEP Administrators ▪MEP Data entry staff



MSIX Functions by User Role

	Primary User	Secondary User	District Data Admin	Regional Data Admin	State Data Admin	State Region Admin	Regional User Admin	State User Admin
My Account	X	X	X	X	X	X	X	X
Search, Display, Print, & Export Student Records in own state	X	X	X	X	X			
Search, Display, Print, & Export Student Records in all states	X		X	X	X			
Generate Reports		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 Level Accounts								X
Create / Modify Regional Level 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		

User Administrator Online Training



User Administrator Hands-on Exercises



State Region Administrator Role





State Region Administrator Role Overview

- Required role for states using optional Regional functionality
- Potential Users
 - State MEP Administrators
- Key Functions
 - Enable and disable regional structure
 - Create new regions
 - Associate districts to regions
 - Edit regions

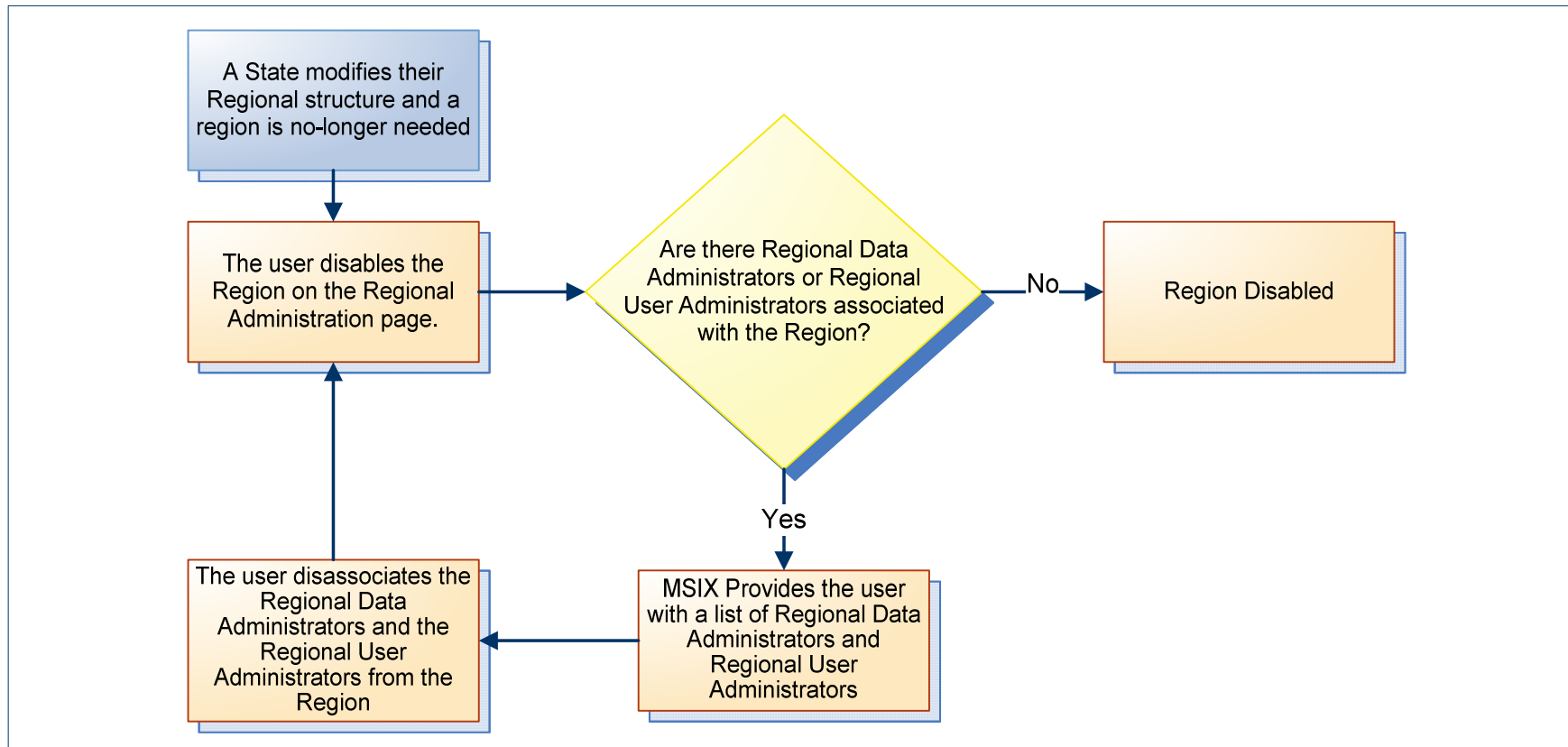


State Region Administration

- Regional functionality is optional
- Regions do not have to be official regions
 - Create to group districts
 - Create for specific work streams
- Regions consist of groups of School Districts within a state
- Regional structures may be used for User Administration, Data Administration, or both



Disabling a Region



State Region Administrator Online Training



State Region Administrator Hands-on Exercises



MSIX Training Strategy





Training Roles and Responsibilities

- **State Trainer** – MSIX state expert who coordinates the MSIX training programs for their state
 - Train other state trainers and expert users
 - Point of Contact for State’s Training Team
 - Direct access to Deloitte Trainer (MSIXTeam@deloitte.com) and Help Desk
- **State Training Team** – State trainers who deliver user training for their state
 - Proportionate in size to State’s migrant program
 - Trained by State Trainer or in Post Regional Conference according to state’s training strategy
 - Point of contact for State’s Users
 - Direct access to State Trainer & Help Desk
- **Users** – All MSIX users
 - Trained by State Training Team according to state’s training strategy
 - Direct access to State Training Team & Help Desk
- **MSIX Training Team**
 - Trains Regional Conferences and Post Regional Conferences
 - Available to conduct train the trainer training and Webinars
 - Continues to assess training materials based on feedback
 - Updates training materials with new releases
 - Directs access to Help Desk escalation resources or MSIX technical team
 - Maintains all training resources

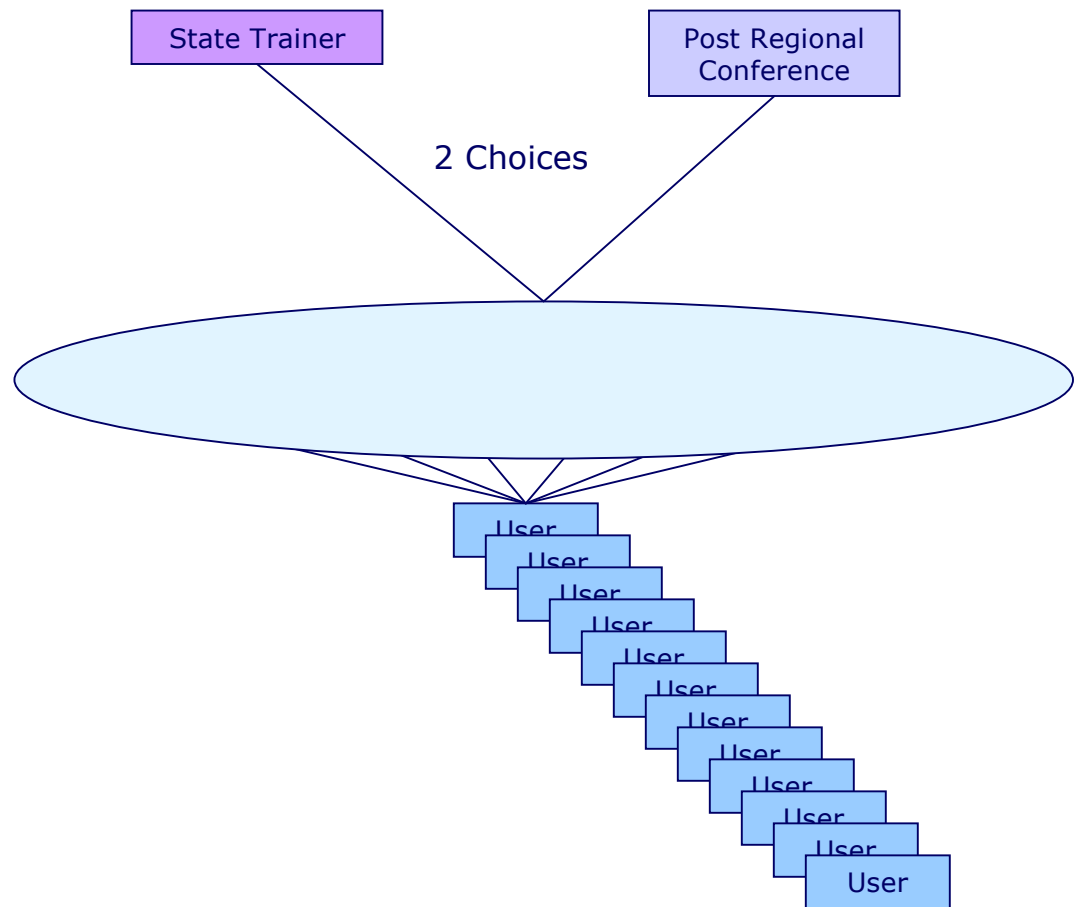


Training Types

- **Train-the-Trainer Training**
 - Used to train State Trainers and State Training Teams
 - Conducted by MSIX Team and State Trainers
- **Instructor-led Training**
 - Used to train other MSIX Users
 - Conducted by State Training Teams
- **Online Training**
 - Used by all users
 - Also leveraged in instructor-led and train-the-trainer training
- **Webinars**
 - Used to train other MSIX Users
 - Conducted by MSIX Training Teams



Training Phase – Implementation Process





Training Support – Tools and People

- Online Training
- Online Help
- Trainer's Toolkit
- MSIX Conference Materials
- Trainer's Corner
- MSIX Training Environment
- MSIX Training Webinars
- Additional MSIX Conferences
- MSIX Help Desk
 - msixsupport@deloitte.com
 - 1-866-878-9525

Wrap-up Question and Answer Session





Suggested State Rollout Activities

	STATE DATA SUBMITTERS	STATE TRAINERS & USERS
October		
1-5	Complete State Profiles; Schedule data file tests; Submit test data files	Attend MSIX Rollout Training Sessions in Portland (Sep 24-25, 2007), DC (Oct 1-2, 2007) or Chicago (Oct. 4-5, 2007)
8-12	Process and test State interfaces	Beginning Oct.11: MEP Directors designate State User Administrators (SUAs); SUAs: <ul style="list-style-type: none"> ▪-take online training; ▪-read User Manual ▪-familiarize yourself with MSIX and the minimum data elements; ▪-set up regions; <ul style="list-style-type: none"> - verify that districts and schools are up-to-date in MSIX - notify EDFACTS staff if there are missing schools or districts ▪- set up User Accounts;
15-19	Test data file for proper formatting; Load data file into MSIX; Report results of loading data file; Verify that data records loaded correctly;	
22-26	Continue activities above	
Oct.29- Nov.2	Submit live data files, and MSIX begins to load live state data	
November		
5-9	Continue to load live data	<ul style="list-style-type: none"> •Users review User Manual ▪Users take online training; ▪Users request approval for MSIX access; ▪SUA's establish user accounts
12-16	Continue to load live data	
19-23	Continue to load live data	
26-30	Continue to load live data	



Next Steps

- States should begin to submit their test data on October 1, 2007.
- States will be given approval to submit live data files as the MSIX team certifies their interfaces.
- Live data will be processed in the order in which it was received and the State interfaces are certified by the MSIX State's Assistance Team.
- States should expect their data to be uploaded into MSIX within 2 weeks of submitting it to the system.
- While States' data are uploaded into MSIX, State Users should read their User Manuals, set up regions, verify that all the schools in their districts are present, conduct and lead training sessions, etc. (see activities above).



MSIX Team Activities

- **MSIX Team Rollout Activities**
 - Sept.24-Oct.5: OME conducts Train-the-Trainer (TTT) sessions in DC, Portland, and Chicago
 - Oct.9-10: OME registers MEP Directors as State User Administrators
 - Nov.5-9: MSIX begins to load live state data
- **Ongoing activities:**
 - Assist States with file submissions
 - Respond to Help Desk requests
 - Provide Technical Assistance with minimum data elements
 - Conduct ongoing TTT sessions and webinars
 - Conduct MSIX conferences and presentations

Questions??

