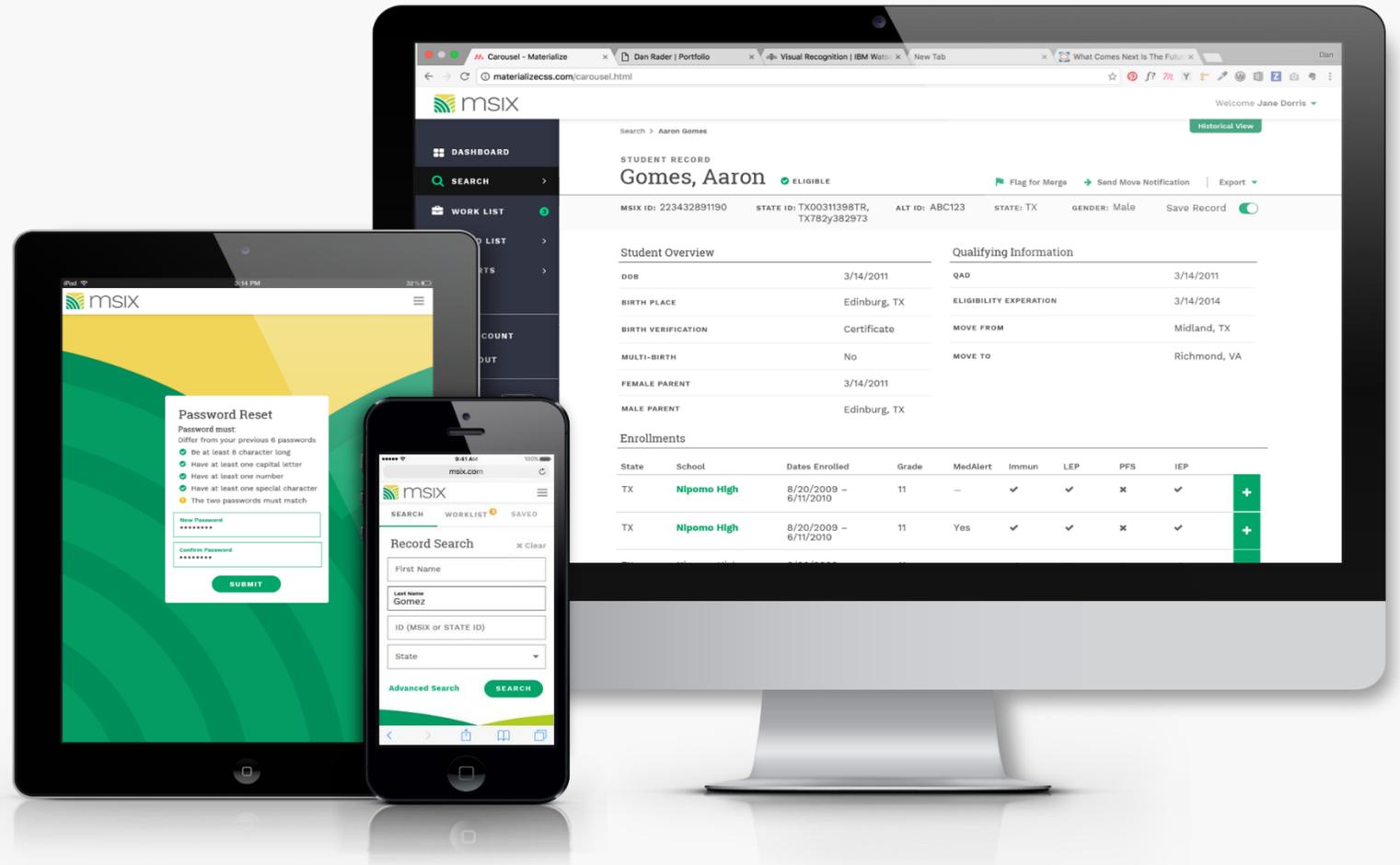




JANUARY 11TH, 2018

Managing Worklist

MSIX Webinar



Agenda

1. The Importance of Worklist

5 Minutes

2. Move Notification

10 Minutes

3. Data Request

10 Minutes

4. Merge Record

15 Minutes

5. Near Matches

15 Minutes

6. User-Initiated Merge

15 Minutes

7. Splits

10 Minutes

8. Auto Escalation & Validation

10 Minutes

The Importance of Worklists

☰ DATA REQUEST

🚩 MERGE RECORD

↗ SPLIT RECORD

➡ MOVE NOTICE

Worklists allow users to take action on near matches, merges, splits, data requests, and move notifications

Near match resolution allows students records to be consolidated and searchable in MSIX

Accurately merging and splitting records will lead to a more accurate child count

MSIX collects, analyzes, and matches records of migratory children submitted by the participating states into a national consolidated view. Managing worklists effectively ensures the student data is accurate, complete, and available to all MSIX users.



Move Notification

Move Notification User Roles

Below are the roles that have access to send a Student Move Notice:

Primary User	Secondary User	District Data Administrator	Regional Data Administrator	State Data Administrator	State Region Administrator	Regional User Administrator	State User Administrator
✓	✓	✓	✓	✓	✓		

Move Notification

MSIX provides a feature to alert another area of a student's relocation in the case of their arrival or departure. In addition to the MSIX notice, you can include comments regarding the student who is relocating. However, it is important to remember, that in order to protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information in the Comments fields. Comments entered will be shared unedited and in their entirety with other MSIX Users.

STUDENT RECORD
Alina Abarca

MSIX ID: ██████████ STATE ID: ██████████ STATE: TX GENDER: FEMALE Save Record

Data Request Flagged for Merge **Move Notice** Export

1. After navigating to a student's Consolidated Student Record View you can initiate the notification by clicking the **Move Notice** link.

Sending Student Move Notifications

Move Notice [Close]

This student is moving from our area to your area

Your student has recently moved to our area

0 / 250

To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information in Comments fields. Comments entered will be shared unedited and in their entirety with other MSIX Users.

Recipient
Select the State, District and School to ensure the move notification is sent to the appropriate Data Administrator.

[Cancel](#) **SUBMIT**

Callout 2: A red box highlights the pre-filled text: "This student is moving from our area to your area".

Callout 3: A red box highlights the text area for comments, with a "0 / 250" character count.

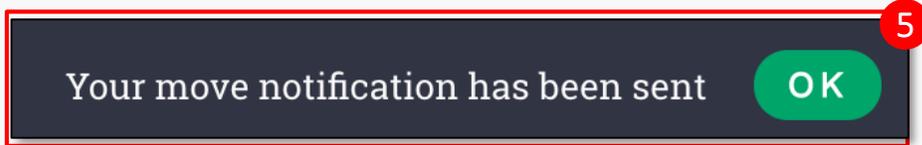
2. Select the appropriate direction the student is moving: either from your state to another state OR the student has arrived in your state from elsewhere.
3. Include any relevant or necessary comments.
4. Select the state, district and school (if known and available).

Recipient
Select the State, District and School to ensure the move notification is

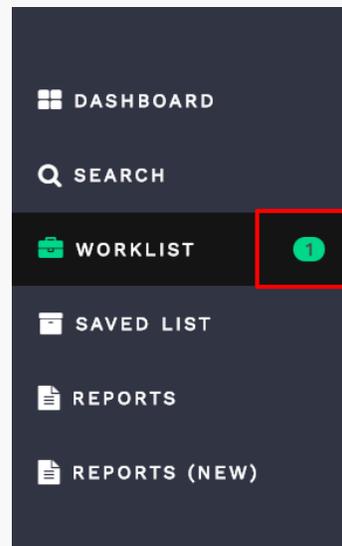
- Alabama
- Alaska
- Arizona
- Arkansas
- California

Callout 4: A red box highlights the dropdown menu for selecting the recipient state.

Student Move Notifications



5. The system will display a timed notice telling you the message was successfully sent.



6. The system will now place the student record in your worklist as well as the corresponding data admin's worklist. You will see a badge on the side navigation as well as the worklist tab that corresponds to the action you have just taken, in this case, it's the Move Notice tab.

7. At this point, you can open the individual notice by clicking the drawer open icon or the student name. Once the record is open, you can click "Full Record" to view the student's full record.

Resolving/Dismissing a Move Notification

DATA REQUEST MERGE RECORD ¹ SPLIT RECORD MOVE NOTICE

Student	Worklist ID	State	MSIX ID	State ID	Created
Learn More	89281	CA	697273717116	06002686004	11/30/2017 0 days in list

State: DOB: State ID: Parent 1: **FULL RECORD**

Gender: Male Born in: Multi-birth: No Parent 2:

Correspondence ⌵

Comments 8

0 / 250

To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information in Comments fields. Comments entered will be shared unedited and in their entirety with other MSIX Users.

DISMISS NOTICE 9

Move notice dismissed **OK** 10

Data Admin User Role View

10. Once the user dismisses the notice, it disappears from their inbox and the timed message is displayed telling them that the action was successful.

Move notice dismissed **OK** 10

Viewing a Move Notification

DATA REQUEST MERGE RECORD ¹ SPLIT RECORD MOVE NOTICE

Student	Worklist ID	State	MSIX ID	State ID	Created
Torres, Aaron	88770	CA	3796298323	0602250482	11/01/2017 29 days in list

State: California DOB: [REDACTED] State ID: [REDACTED] Parent 1: MARIA TORRES

Gender: Male Born in: LA PESCADE, MICHIGAN DE CHARLES Multi-birth: No Parent 2: VICTOR TORRES

FULL RECORD

Correspondence

Primary User Role View

Primary and Secondary users will be able to view the move notifications that they have initiated

Move Notices: Best Practices

- Sending notices in a timely manner will allow the receiving states to quickly identify and enroll them for service
- A receiving state can notify the sending state who might not be aware that the family has left and can withdraw the student and submit the updated information of the child to MSIX in a timely manner.
- In order to protect the student's privacy, do not include any sensitive information such as Social Security Numbers, Birthdates or other Personally Identifiable Information in Comments fields. Comments entered will be shared unedited and in their entirety with other MSIX Users.

Questions?



Data Request

Data Request User Roles

Below are the roles that have access to send, reply, resolve, and reassign a Data Request:

User Role / Action	Primary User	Secondary User	District Data Administrator	Regional Data Administrator	State Data Administrator	State Region Administrator	Regional User Administrator	State User Administrator
Data Requests: Send & Reply	✓	✓	✓	✓	✓			
Data Requests: Resolve & Reassign			✓	✓	✓			

Data Requests

- DASHBOARD
- SEARCH
- WORKLIST 128
- SAVED LIST
- REPORTS
- REPORTS (NEW)
- HELP
- MY ACCOUNT
- SIGN OUT

STUDENT RECORD
Alina Abarca

MSIX ID: 599225991858 STATE ID: TX00502932TR STATE: TX GENDER: FEMALE Save Record

Texas (TX00502932TR) ▼

Florida (FL00102733TR) ▼

1 Data Request Flagged for Merge Move Notice Export

1. After navigating to a student's Consolidated Student Record View you can initiate a data request by clicking the **Data Request** button
2. Complete the form fields in the pop-up.

Data Request ×

To initiate a data request, please supply comments and assign a recipient.

Comments 0 / 250

To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information in Comments fields. Comments entered will be shared unedited and in their entirety with other MSIX Users.

Recipient
Select the State, District and School to ensure the request for data is sent to the appropriate Data Administrator.

[Cancel](#) **SUBMIT**

2

Popup will appear upon clicking **Data Request**

Data Request

Navigation bar with the following items:

- DATA REQUEST** (highlighted with a red box and a red circle containing the number 3)
- MERGE RECORD (with a green circle containing the number 77)
- SPLIT RECORD (with a green circle containing the number 48)
- MOVE NOTICE (with a green circle containing the number 3)

3. To view data requests that have been sent to you, as well as data requests you have initiated, navigate to your worklist in the left-hand menu and select the **Data Request** tab.

Student	Worklist ID	State	MSIX ID	State ID	Created
	88116	CA		06002796084	09/27/2017

State: California	DOB: 05/23/2007	State ID: 06002796084	Parent 1: 	FULL RECORD
Gender: Female	Born in: 	Multi-birth: No	Parent 2: 	

Correspondence

Resolving/Dismissing a Data Request

DATA REQUEST MERGE RECORD ⁷⁷ SPLIT RECORD ⁴⁸ MOVE NOTICE ³

**Data Admin User
Role View**

89282 CA 697273717116 06002686004 12/01/2017 4 days

State: California DOB: State ID: Parent 1: **FULL RECORD**
Gender: Male Born in: Multi-birth: No Parent 2:

Correspondence [dropdown arrow]

Comments [0 / 250]

RESOLVE REQUEST
Reassign Record

To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information in Comments fields. Comments entered will be shared unedited and in their entirety with other MSIX Users.

Viewing a Data Request

Navigation bar: DATA REQUEST (highlighted), MERGE RECORD ⁷⁷, SPLIT RECORD ⁴⁸, MOVE NOTICE ³

Student	Worklist ID	State	MSIX ID	State ID	Created
Rosendo Fuentes, Jr	88116	CA	2754328214	08027543214	09/27/2017

Details: State: California, Gender: Female, DOB: [redacted], Born in: [redacted], State ID: [redacted], Multi-birth: No, Parent 1: [redacted], Parent 2: [redacted]

Buttons: FULL RECORD, Correspondence [dropdown]

Primary User Role View (highlighted in red box)

Primary and Secondary users will be able to view the data requests that they have initiated

Data Requests: Best Practices

- Once a data request is on your worklist it automatically starts counting down the time you have to respond to the request (4 days)
- Users can request and confirm that the state where the student came from has submitted updated information to MSIX
- Through frequent exchange of data requests, users can build a network of peers where migratory children are traveling
- Timely response to data requests are critical to a student's success
- To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information in the Comments fields in any Data Requests. Comments entered will be shared unedited and in their entirety with other MSIX Users.

Questions?

Break



Merge Records

Worklist User Roles & Functions

Below are the roles that have access to initiate, validate, reject and reassign student Merges and Splits:

User Role / Action	Primary User	Secondary User	District Data Administrator	Regional Data Administrator	State Data Administrator	State Region Administrator	Regional User Administrator	State User Administrator
Initiate Student Merges and Splits	✓		✓	✓	✓			
Validate/Reject Student Merges and Splits			✓					

Merge Record

- States submit student records to MSIX to ensure the MSIX database has the most recent and accurate student information.
- There are two ways student data is merged
 - By **User Initiated Merge**— 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.
 - By the **MSIX Application** — When a record is submitted, MSIX matches the record to determine whether it already exists in MSIX or is a new record.
 - Student Records are evaluated to determine if they are new or potentially match an existing MSIX record.
 - This is done via the MSIX **Matching Engine** that produces a Matching Score using the following MDEs:

MDE #	MDE Name
4	First Name
5	Middle Name
6	Last Name
7	Last Name 2
9	Sex
10	Birth Date

MDE #	MDE Name
13	Birth State
14	Birth Country
16	Male Parent First Name
17	Male Parent Last Name
18	Female Parent First Name
19	Female Parent Last Name

Merge Record

- After the MSIX **Matching Engine** produces a Matching Score one of the following will occur:

New MSIX Record	No existing record matches
Match	The new record closely matches an existing MSIX record and is merged with that record
Near Match	The new record somewhat matches an existing MSIX record, but results are not conclusive. Therefore, human review is required.

Merge Record

☰ DATA REQUEST

🚩 MERGE RECORD 35

↗ SPLIT RECORD

➡ MOVE NOTICE 1

Validate Record Merge

This section contains all student records that have been submitted for merge validation. The user will be able to validate or reject the merging of these records. If you reject the merge, the individual student records will remain unchanged and a new MSIX ID will be created. If you validate the merge, the student records will be merged into one.

Near Matches

This section contains all student records that have been identified as potential near matches. The user can process or reject the merging of these records.

Flagged for Merge

This section contains all student records that have been flagged for merging. To initiate a merge, the user should select at least two flagged records, click the “Process Merge” button, and then assign a master record. To remove a student from the merge process, click on the “Remove from List” button.

Questions?

A photograph of a lush green field of tall grass, possibly wheat or barley, with a white rectangular text box overlaid on the right side. The grass is dense and appears to be blowing in the wind. The text box is positioned in the lower right quadrant of the image.

Near Match

Process Near Match

DATA REQUEST

MERGE RECORD ³⁵

SPLIT RECORD

MOVE NOTICE ¹

Near Matches

New Worklist ID now displayed

<input type="checkbox"/>		83599	ID	Male	03/17/2005	N/A	257926532	06/19/2014 1259 days in list
Parent 1:		State ID:		Born in:		FULL RECORD		
Parent 2:				Multi-birth:		No		
<input type="checkbox"/>			ID	Male	03/17/2005	744596526783	257926532	06/19/2014 1259 days in list
Parent 1:		State ID:		Born in:		FULL RECORD		
Parent 2:				Multi-birth:		No		

Comments 0 / 250

To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information in Comments fields. Comments entered will be shared unedited and in their entirety with other MSIX Users.

PROCESS NEAR MATCH

REJECT NEAR MATCH

[Reassign Record](#)

Process Near Match

DATA REQUEST

MERGE RECORD ³⁵

SPLIT RECORD

MOVE NOTICE ¹

Near Matches

New checkboxes

<input type="checkbox"/>	83599	ID	Male	03/17/2005	N/A	257926532	06/19/2014 1259 days in list
Parent 1:		State ID:		Born in:		FULL RECORD	
Parent 2:				Multi-birth:			
<input checked="" type="checkbox"/>		ID	Male	03/17/2005	744596526783	257926532	06/19/2014 1259 days in list
Parent 1:		State ID:		Born in:		FULL RECORD	
Parent 2:				Multi-birth:			

Comments

0 / 250

To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information in Comments fields. Comments entered will be shared unedited and in their entirety with other MSIX Users.

[PROCESS NEAR MATCH](#)

[REJECT NEAR MATCH](#)

[Reassign Record](#)

Process Near Match

DATA REQUEST

MERGE RECORD 35

SPLIT RECORD

MOVE NOTICE 1

Validate Record Merge

- After clicking **Process Near-Match**, the worklist item will be moved to **Validate Record Merge** and removed from the Near-Match section. The State Data Administrator assigned to the original student record will receive a notification to validate the merge that you initiated.
- The Validate Record Merge worklist item is now on the appropriate State Data Administrator's Worklist.

	45704	TX	FEMALE	09/22/1994	214629753517	TX0010060	10/16/2012 1870 days in list
Parent 1: DANA ABATE		State ID: TX00110060		Born in: MADEIRA, California de Zaragoza			Master Record
Parent 2: JOHN MICHAEL ABATE				Multi-birth: NO			FULL RECORD
Zebasil , Soe Janeth	45704	CO	FEMALE	07/22/1994	177452443957	CO00300144TR	
Parent 1: DANA ABATE		State ID: CO00300144TR		Born in:			FULL RECORD
Parent 2: JOE ABATE				Multi-birth: NO			

Merge History

Comments 0 / 250

VALIDATE MERGE

REJECT MERGE

Reassign Record

To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information in Comments fields. Comments entered will be shared unedited and in their entirety with other MSIX Users.

Validate Near Match

The screenshot shows the MSIX Student Record interface. On the left is a dark sidebar with navigation options: DASHBOARD, SEARCH (highlighted with a red box), WORKLIST (with a 128 badge), SAVED LIST, REPORTS, REPORTS (NEW), HELP, MY ACCOUNT, and SIGN OUT. The main content area is titled 'STUDENT RECORD' and shows the name 'Alina Abarca'. Below the name are fields for MSIX ID (599225991858), STATE ID (TX00502932TR), STATE (TX), and GENDER (FEMALE). There are action buttons for 'Data Request', 'Flagged for Merge', 'Move Notice', and 'Export'. A 'Save Record' toggle is also present. Below this, a table lists near matches:

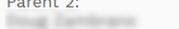
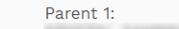
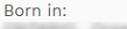
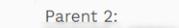
State	MSIX ID	Action
Texas	(TX00502932TR)	▼
Florida	(FL00102733TR)	▼

5. Following the validation of the merge, you can search for the student record to verify that the two records have been merged. After selecting the student record navigate to the **Historical Record View**. The students previous state and new state are displayed, with further details nested within each. The existing MSIX ID has been assigned to the new Student Master Record.

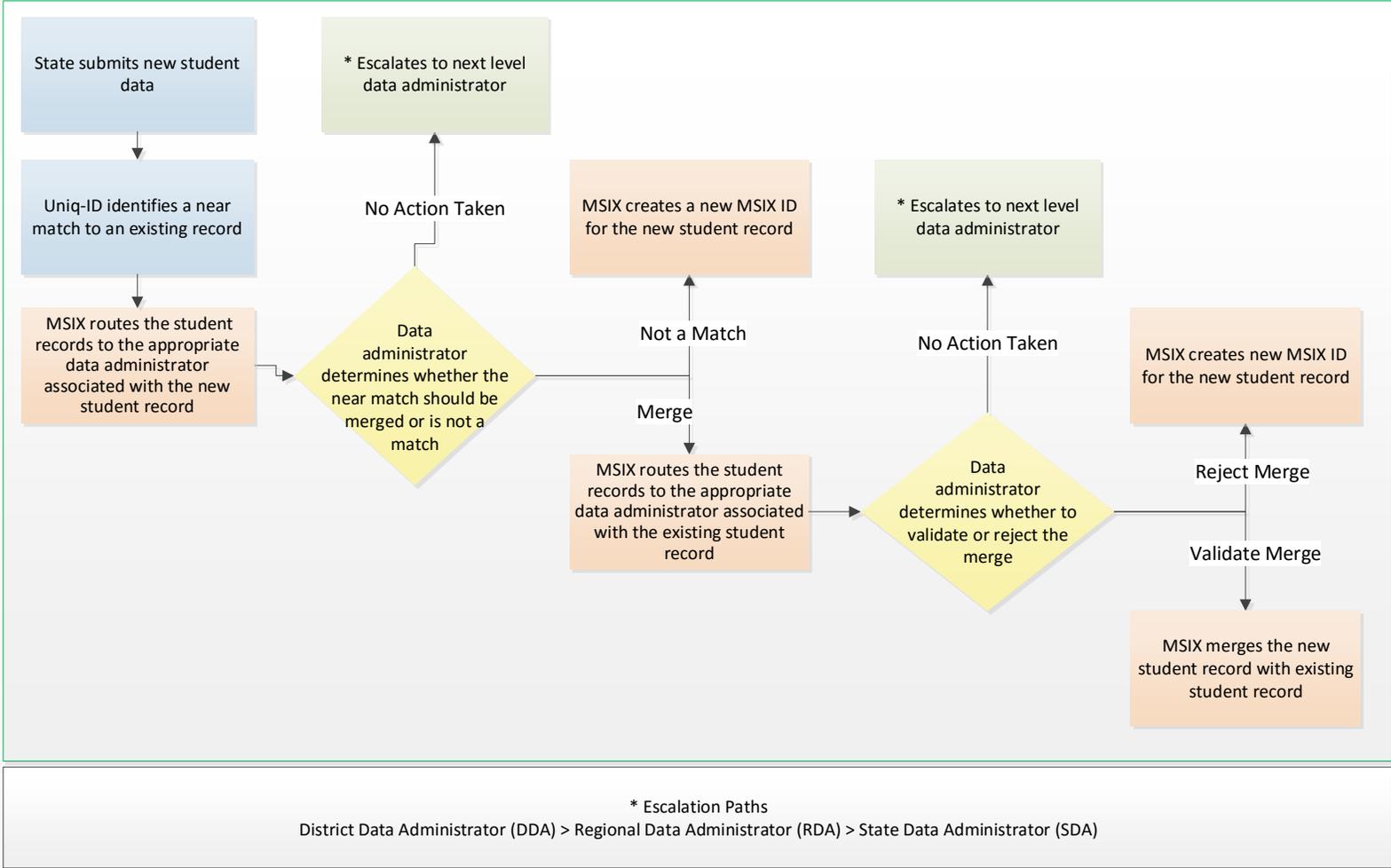
Reject Near Match

Check the record that you would like to reject

Check all the boxes to reject the entire Near Match

<input type="checkbox"/>		OR	Female	08/25/2001	186721352136		06/19/2014 1260 days in list	<input type="checkbox"/>
Parent 1: 			State ID: 		Born in: 		FULL RECORD	
Parent 2: 					Multi-birth: No			
<input checked="" type="checkbox"/>		OR	Female	10/07/2006	186721352136		06/19/2014 1260 days in list	<input type="checkbox"/>
Parent 1: 			State ID: 		Born in: 		FULL RECORD	
Parent 2: 					Multi-birth: No			
<input checked="" type="checkbox"/>		OR	Female	10/07/2006	186721352136		06/19/2014 1260 days in list	<input type="checkbox"/>
Parent 1: 			State ID: 		Born in: 		FULL RECORD	
Parent 2: 					Multi-birth: No			
Comments							PROCESS NEAR MATCH	REJECT NEAR MATCH
							0 / 250	

Workflow for Near Match Resolution & Validation



Questions?

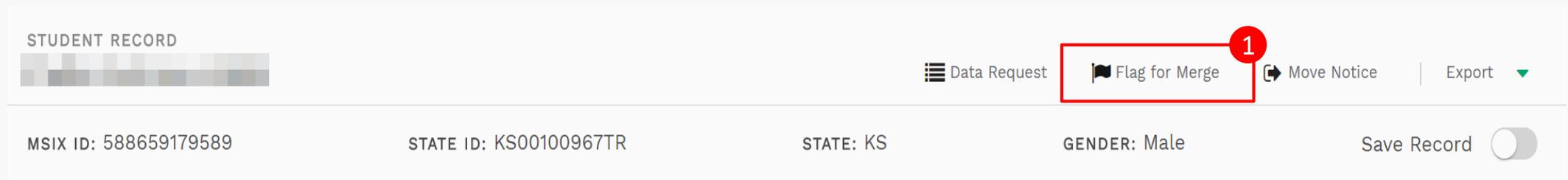


User-Initiated Merge

Flag for Merge

Combine multiple records for the same student

- Users can initiate a merge to request that student records be combined
- Validated through a review and approval workflow (facilitated by user worklists, action escalations, and email notifications)



The screenshot shows a student record interface. At the top left, it says "STUDENT RECORD" above a blurred student photo. On the right side, there is a toolbar with several buttons: "Data Request", "Flag for Merge", "Move Notice", and "Export". The "Flag for Merge" button is highlighted with a red rectangular box, and a red circle with the number "1" is placed above it. Below the toolbar, the student's details are displayed: "MSIX ID: 588659179589", "STATE ID: KS00100967TR", "STATE: KS", and "GENDER: Male". On the far right, there is a "Save Record" button with a toggle switch.

1. Select a Student Record link from the list on the “Search Results for Student” page. (It is assumed that you have reviewed the student records thoroughly) In the upper right hand corner, you will see **Flag for Merge** if the student record is able to be merged with another record.

Flag for Merge

☰ DATA REQUEST **🚩 MERGE RECORD** ³⁵ ↶ SPLIT RECORD ➡ MOVE NOTICE ¹

Flagged for Merge

	Student(s)	State	Gender	DOB	MSIX ID	State ID	Created	
2	<input checked="" type="checkbox"/> Abrego , Andres Es teban	TX	MALE	10/09/1999	881357466126	TX00513104TR	11/29/2017 0 days in list	▼
	<input checked="" type="checkbox"/> Abarca , Alina	TX	FEMALE	01/27/1996	599225991858	TX00502932TR	11/29/2017 0 days in list	▼

2. After flagging the record to be merged, you will now see the Student Record(s) under Flagged for Merge. Expand the record to view the student details (if necessary).

PROCESS MERGE ³

3. Select the Student Records you would like to merge, and select Process Merge at the bottom of the queue.

Process the Merge

4. You'll be prompted to select a **Master Record**. The other record(s) will become child record(s). Add notes if needed and click **Confirm**.
5. Once complete, the Student Record(s) from the merge, will be removed from your list and the appropriate data administrator will be notified to complete the validation of the merge.

Select Master Record ✕

Please select a master record and confirm that you wish to merge the following 2 records. To edit the merged records, select 'cancel' and make your correction.

Master	Name	MSIX ID	State ID	Date of Birth
<input type="radio"/>	Abrego , Andres Esteban	881357466126	TX00513104TR	10/09/1999
<input type="radio"/>	Abarca , Alina	599225991858	TX00502932TR	01/27/1996

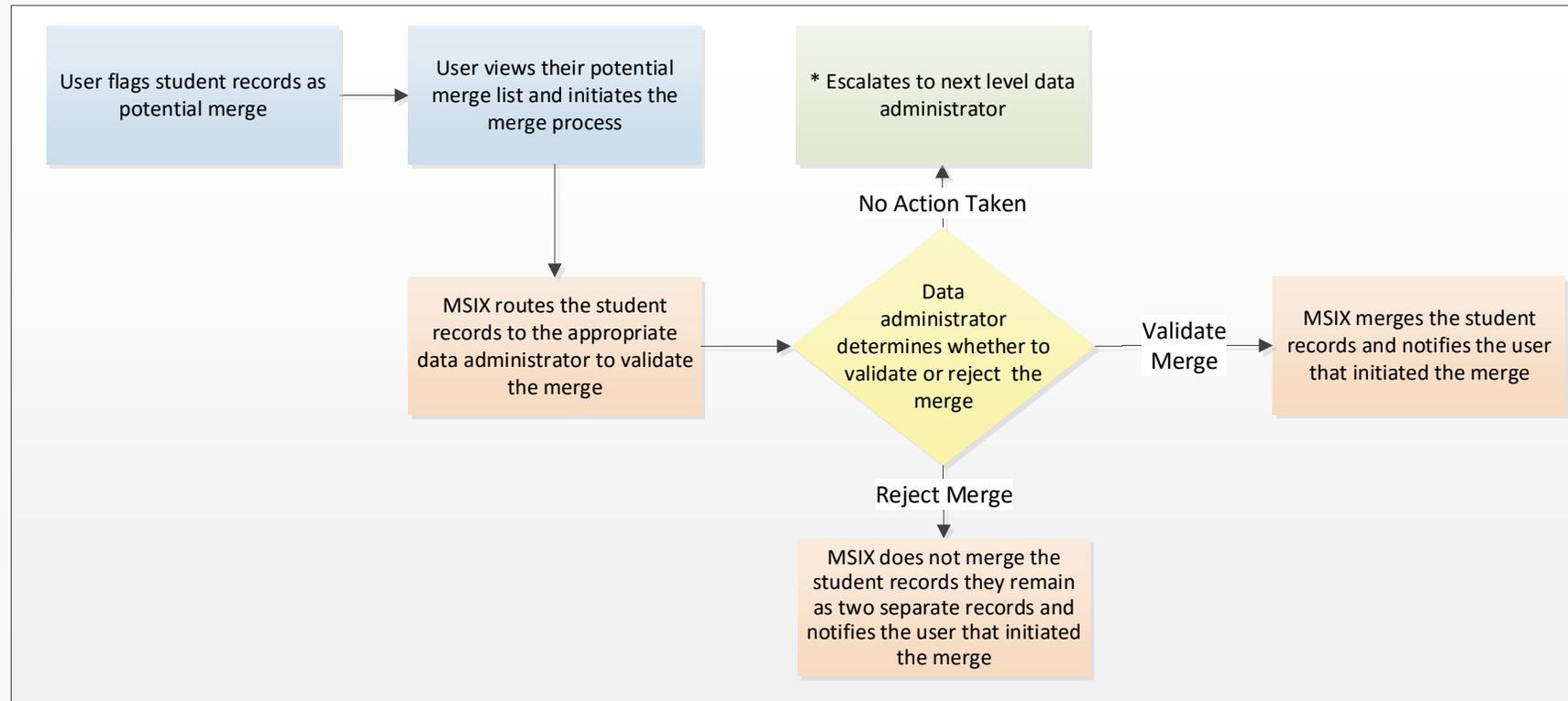
Comments

0 / 250

To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information in Comments fields. Comments entered will be shared unedited and in their entirety with other MSIX Users.

[Cancel](#) **CONFIRM**

Workflow for User-Initiated Merge



* Escalation Paths

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

Questions?



Split

Flag for Split

Separate erroneously combined students

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. The MSIX ID will need to have at least two records to be able to initiate the split. Once a split has been initiated, MSIX automatically notifies the appropriate Data Administrator to review and validate or reject the split.

- Splits are user-initiated requests to manually separate a merged student record
- Validated through a review and approval workflow (facilitated by user worklists and email notifications)



The screenshot shows a student record interface. At the top left, it says "STUDENT RECORD" followed by a blurred name. On the right side, there is a menu bar with several options: "Data Request", "Flag for Merge", "Flag for Split", "Move Notice", and "Export". The "Flag for Split" option is highlighted with a red box, and a red circle with the number "1" is placed above it. Below the menu bar, there are several fields: "MSIX ID: 341561522161", "STATE ID: NJ00200660TR", "STATE: NJ", and "GENDER: Male". On the far right, there is a "Save Record" button with a toggle switch.

1. Select a Student Record link from the list on the “Search Results for Student” page. (It is assumed that you have reviewed the student records thoroughly) In the upper right hand corner, you will see **Flag for Split** if the student record has been previously merged.

Split Record

DATA REQUEST

MERGE RECORD ⁷

SPLIT RECORD

MOVE NOTICE ⁰

2. After flagging the record to be split, you will now see the Student Record(s) under **Split Record**. Expand the record to view the student details (if necessary).

Student(s)	Worklist ID	State	Gender	DOB	MSIX ID	State ID	Created
[REDACTED]	[REDACTED]	ID	Male	02/08/2007	[REDACTED]	571275888	10/02/2017 59 days in list
Parent 1: [REDACTED]		State ID: [REDACTED]		Born In: Corpus Cristi , Texas		FULL RECORD	
Parent 2: [REDACTED]		Multi-birth: No					
View Full Record	88308	TX	MALE	02/09/2007	[REDACTED]	02094629AIC	10/02/2017 59 days in list
Parent 1: [REDACTED]		State ID: [REDACTED]		Born In: CORPUS CHRISTI , Texas			
Parent 2: [REDACTED]		Multi-birth: NO					

[Split History](#)

Comments 0 / 250

To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information in Comments fields. Comments entered will be shared unedited and in their entirety with other MSIX Users.

VALIDATE SPLIT

REJECT SPLIT

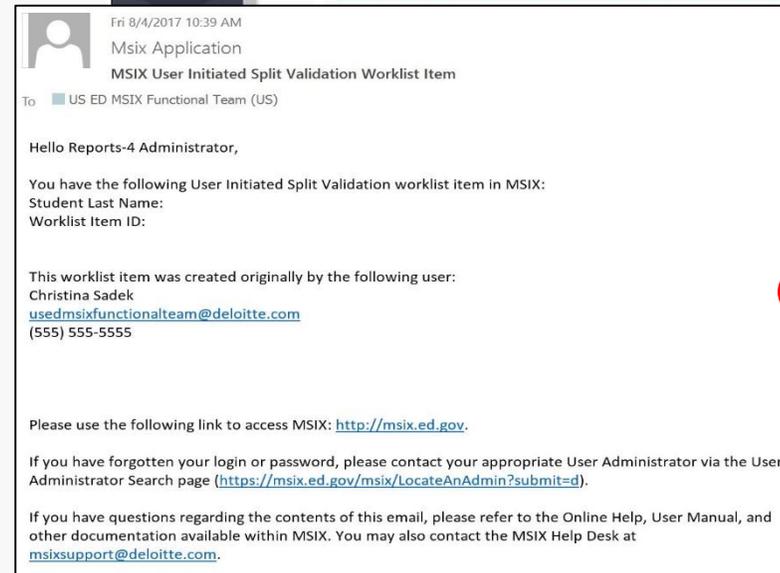
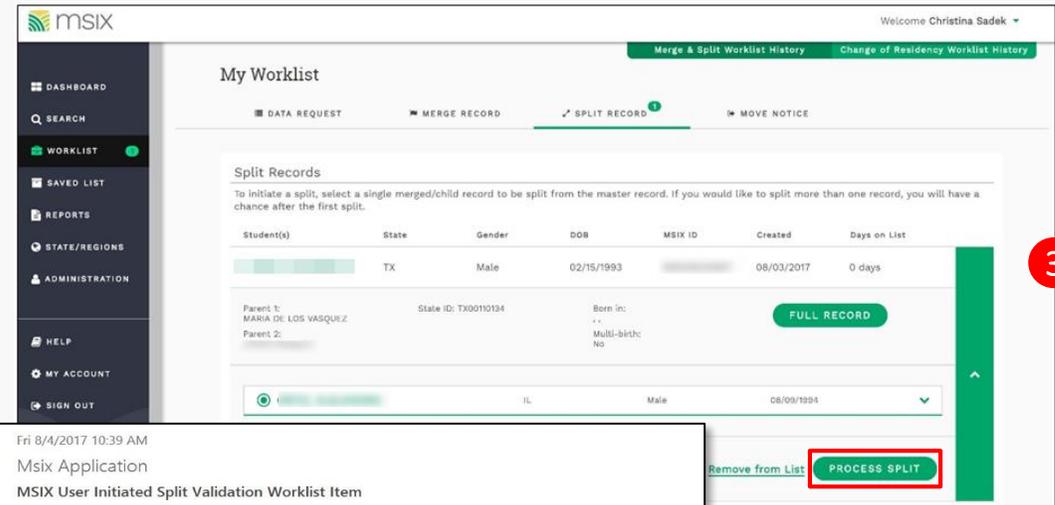
[Reassign Record](#)

²

Process a Split

3. Expand the appropriate Split Record worklist item to view the student details. After a concise and thorough review, if you determine that the student should be split, click **Process Split**.

4. Once complete, the record from the split will be removed from your worklist and the appropriate Data Administrator will be notified to complete the validation of the split. *An example of this notification is displayed.*



Rejecting the Split

- After receiving the split record request from another user, the Data Administrator determined that the student record was not erroneously merged for various reasons. You can view the **Split History** to view the corresponding workflow for the record. Enter a detailed comment into the comment box, and select **Reject Split**.
- After rejecting the split, the record will be removed from the validate split worklist and the appropriate Data Administrator will be notified that the split was rejected with any corresponding comments made by the rejecting party. *An example of a rejected split notification is displayed.*

The screenshot displays the MSIX application interface. On the left is a navigation sidebar with options: DASHBOARD, SEARCH, WORKLIST (with a green indicator), SAVED LIST, REPORTS, HELP, MY ACCOUNT, SIGN OUT, and TRAINING. The main content area shows a list of student records. The first record is for a student with last name HERNANDEZ, ADRIAN, born 08/09/1994, with parents ELIZABETH VASQUEZ and JESUS VASQUEZ. A 'FULL RECORD' button is visible. Below this is a 'Split History' table:

Workflow	State	User	Status	Date
Creation	FL	Christina Sadek	Pending Validation	08/03/2017

At the bottom right of the interface, there are three buttons: 'VALIDATE SPLIT', 'REJECT SPLIT' (highlighted with a red box), and 'Reassign Record'. A red circle with the number '5' is positioned to the right of the interface.

Below the interface is a screenshot of an email notification. The email header includes the date 'Sun 8/6/2017 9:37 PM', the sender 'Msix Application', and the recipient 'US ED MSIX Functional Team (US)'. The body of the email reads:

Hello Christina Sadek,

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

This worklist item was created originally by the following user:
Christina Sadek
usedmsixfunctionalteam@deloitte.com
(555) 555-5555

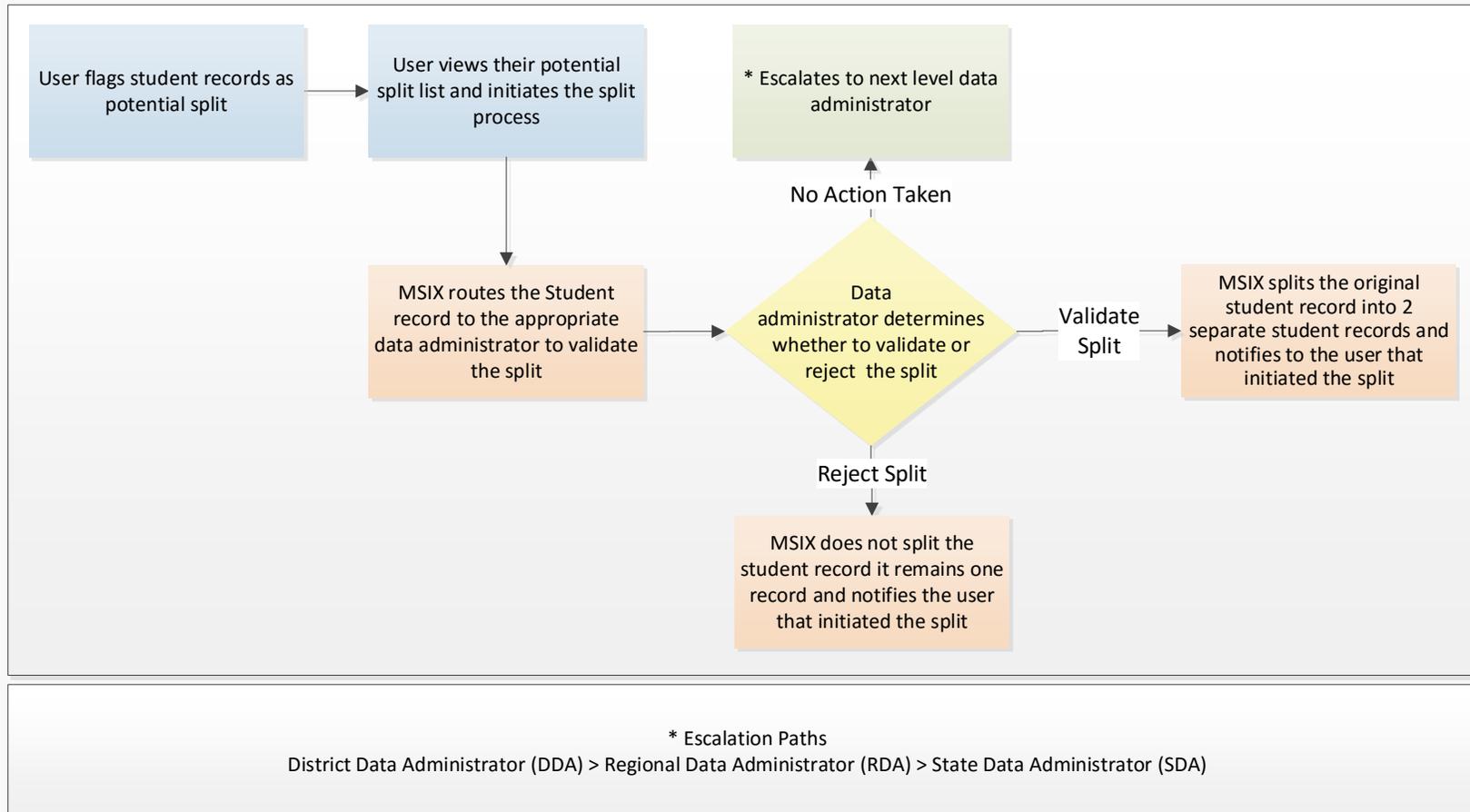
Please use the following link to access MSIX: <http://msix.ed.gov>.

If you have forgotten your login or password, please contact your appropriate User Administrator via the User Administrator Search page (<https://msix.ed.gov/msix/LocateAnAdmin?submit=d>).

If you have questions regarding the contents of this email, please refer to the Online Help, User Manual, and other documentation available within MSIX. You may also contact the MSIX Help Desk at msixsupport@deloitte.com.

A red circle with the number '6' is positioned to the right of the email notification.

Workflow for Split



Questions?

Merge/Split: Best Practices

- When Merging and Splitting students answer the same question: “Are these records for the same student?”
- Data does not need to be identical for the records to be for the same student
- Individual data elements submitted by each state will be preserved and accessible on the student’s Historical View, regardless of how a worklist is resolved
- States can continue to provide new and updated data for students *after* worklists are resolved
- Merge resolution decisions can be reversed later using the Split function
- Decisions and comments made by users on previous worklist items can be viewed using the Worklist History
- Users can reassign worklist items to other users, if necessary
- Student records in pending near match and merge validation are not viewable to other users so timely resolution is important
- Rejecting near matches will create a new MSIX ID for the record. Users should carefully review this so that duplicate records are not created



**Auto Escalation &
Worklist
Assignment**

Auto Escalation

Auto Escalation

Worklist items are automatically escalated

- MSIX will automatically escalate unresolved worklist items
- Worklist items are escalated to the next level of Data Administrators (DDA → RDA → SDA)
- The escalation timeline and hierarchy is displayed in the table below.

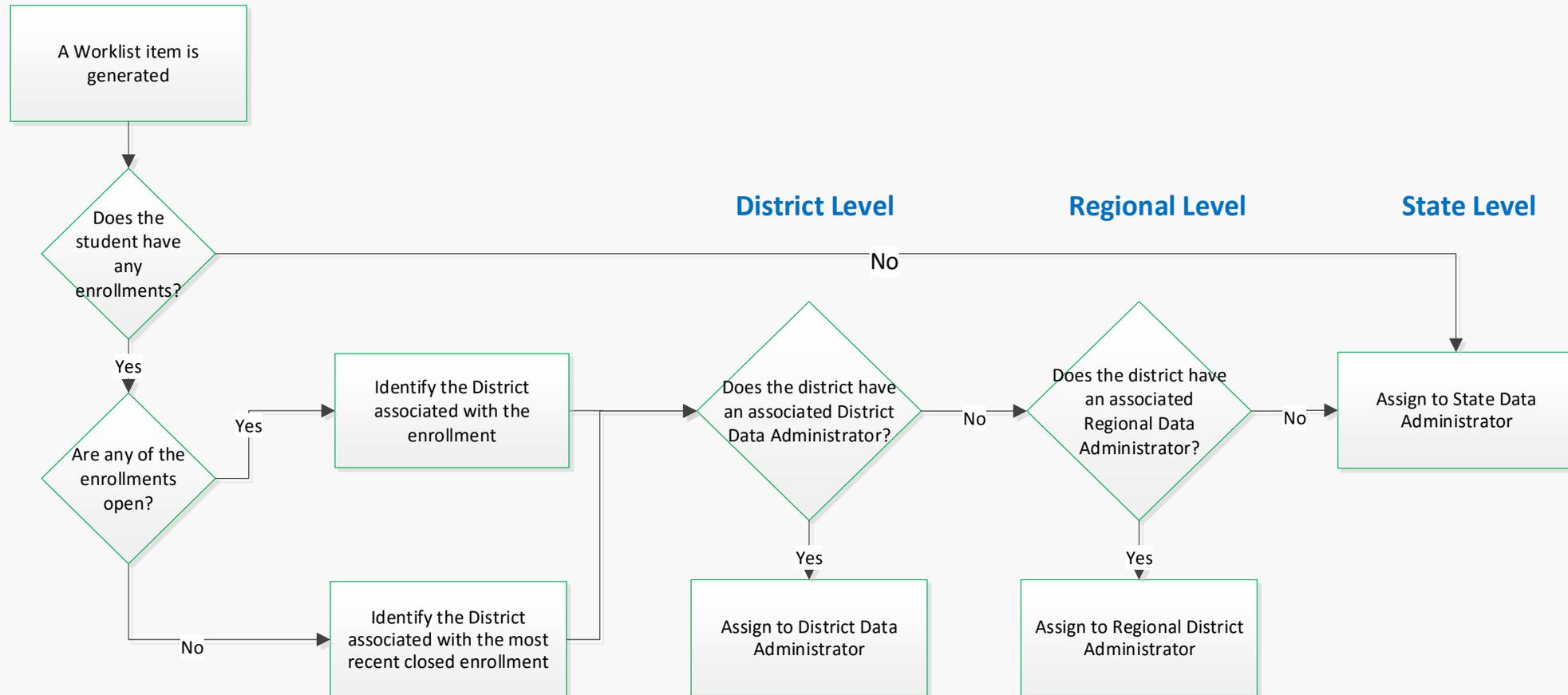
Escalation Timeline				
State Hierarchy	District Level	Regional Level	State Level	Total Escalation Timeframe
District, Regional & State	1 week	1 week	1 week	3 weeks
District & State	1 week		2 weeks	3 weeks
Regional & State		1 week	2 weeks	3 weeks
State			3 weeks	3 weeks

Auto Escalation – Approval

Worklist items are automatically processed

- Validate Worklist items (Near Match, User-Initiated Merge, and User-Initiated Split) can be automatically processed
- This prevents student records from being held-up for long periods of time while worklist items are pending
- Near Match Worklist items are not initially reviewed or initiated by a Data Administrator. Therefore, these worklist items will not be automatically processed

Merge/Split Assignment



Questions?

Contact Info & Additional Resources

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Tali Cohen

tacohen@deloitte.com

MSIX Help Desk

msixsupport@deloitte.com

Telephone:

1-866-878-9525

9:30 AM - 6:30 PM Eastern Time

Monday through Friday, except Federal Holidays

MSIX Resources | MDE List:

<https://msix.ed.gov/> > Login > RESOURCES > MDE List

MSIX Resources | Help:

<https://msix.ed.gov/> > Login > RESOURCES > Online Help