MSIX Quick Reference Guide

Help and Training

Online Training and User Guides: Click the **Help** or **Training** link in the top navigation.

For help with your account contact your User Administrator. Click **Contact Us** in the top navigation and then use the User Administrator Search to find your User Administrator.

For technical issues contact the MSIX Help Desk at msixsupport@deloitte.com or 1.866.878.9525.

Forgot Password

1. Go to the MSIX site (https://msix.ed.gov).
2. Click **Forgot Password.**
3. Follow the instructions to have your password reset initiated by a User Admin.
4. Use the temporary password in the Password Reset email to access MSIX and change your password.

Update Your Account Information

1. Click the **My Account** link in the top navigation.
2. Update Account Information, such as your **Work Telephone Number** and **Reset Password**.
3. Click the **Save** button.

If you are locked-out of MSIX, contact your User Administrator. The Help Desk cannot reset locked passwords.

Search, Display, and Print Records

1. Click the **Student Search** link in the left navigation.
2. On the Student Search page, enter the search criteria. You must enter at least one the MSIX ID, State Student ID, Student First Name, Student Middle Name, or Student Last Name.
3. Click the **Search** button.
4. Select an Individual Student Record by clicking on the **MSIX ID link** on the search results list. This will display the student's Consolidated Record.
5. To view the student's Historical Record, Click the **Historical Student Record View** link on the top of Consolidated Record page.
6. To print the record, click the **HTML, PDF, or Word** printing options.
7. To export the record, click the Export to File button.

Send Email Notifications

1. Perform a **Search** for desired student.
2. Select an Individual Student Record by clicking on the MSIX ID link on the search results list**.** This will display the student's **Consolidated Record.**
3. At the bottom of the Student Record, click **Send Notification.** This can be done from any tab within the student's **Consolidated Record**.
4. From the **Send Notification** screen, choose the State, District and/or School where notification will be sent.
5. Select the appropriate **Message Title**.
6. Insert any relevant **Comments**, but do not send any sensitive information such as Social Security Numbers or other Personally Identifiable Information (PII). It is recommended that the recipient contact the sender directly for phone numbers, addresses or other PII.
7. Click **Next**.
8. After reviewing the **Notification**, click **Yes** for confirmation.
9. The email originator and the recipient will both be sent a notification for record keeping purposes.

Reports

1. Click on the **Reports** link in the left hand navigation.
2. On the **Reports** page, view the desired report by clicking on the report name in the left hand navigation.
3. Click **Filter** at the top of the page to filter desired report by State and any applicable date ranges.
4. On **Student Info Reports**, double-clicking the cells will allow the user to **view** the students' MSIX IDs, State-Specific IDs and last names. Click **Export Data** to save this information as a file.
5. On **Mobility Reports**, reports may be filtered by enrollments or qualifying moves. Qualifying Moves can include intrastate and international moves as well as specific date ranges.
6. All reports may be exported via PDF or Excel. Click on the appropriate icon at the top left of the screen, next to Filter, in order to export the report in the desired format.

Steps to Resolve Near Matches – Must be resolved by a Data Admin

1. Click the **Worklist** link in the left navigation and then click in the Near Matches section.
2. On the Near Match Resolution page, if none of the Near Matches provided match the New Student, click the **New MSIX ID** button. The student's Consolidated View will be updated overnight with a new MSIX ID.
3. On the Near Match Resolution page, if one of the Near Matches provided matches the New Student, select the Near Match and click the **Merge Record** button. MSIX routes the merged records to a Data Administrator for validation.

Steps to Initiate a Merge

1. Locate the student's record by completing the student search.
2. On the Student Record view, click on the **Flag for Merge** link to add the record to the Potential Merge List.
3. Repeat this process to flag the other matching student record(s).
4. Click on the **Potential Merge List** link in the left navigation.
5. Select the student records to merge and click the **Process Merge** button.
6. Select the record with the current State Student ID to be the master student record.
7. Click the **Merge** button.
8. MSIX routes the merged records to a Data Administrator for validation.

Steps to Initiate a Split

1. Locate the student's record by completing the student search.
2. On the Student Record view, click on the **Flag for Split** link.
3. Click on the **Potential Split List** link in the left navigation.
4. Select the record to split.
5. Indicate the Master Record. The "Master Record" is the one which keeps the existing MSIX ID; the other student record(s) are assigned a new MSIX ID.
6. Click the **Process Split** button.
7. MSIX routes the split records to a Data Administrator for validation.

Validating or Rejecting Merges and Splits – Will Auto-Resolve in 3 Weeks unless Resolved by Data Admin

1. Click the **Worklist** link in the left navigation.
2. On the Worklist page, click the link in the Validate Merge or Validate Split section that you wish to review.
3. On the Validate Merge/Validate Split page, click on the Student ID links to research the student's information in their Consolidated, Historical, and Raw Record Views.
4. On the Validate Merge/Validate Split page, click Reject Merge/Split or Validate Merge/Split based on the outcome of your research.

Create New User Account

1. Click the **User Administration** link in the left navigation.
2. On the User Administration page, click the **Create New User** link.
3. On the Create New User page, enter **First Name, Last Name, Work Telephone Number, Work Email, and User Role**.
   (District and/or Region are required for some roles.)
4. Click the **Next** button.
5. Verify and click the **Save** button.
6. MSIX emails the User ID and password to the new user directly

Disable/Deactivate or Enable an Account

1. Click the **User Administration** link in the left navigation.
2. On the User Administration page, search for the user whose account you are updating.
3. On the Create or Update MSIX User page, select the proper account status.
4. Click the **Next** button.
5. Verify and click the **Save** button.

Data Errors

MSIX receives data from State MEP systems. If you identify an error please work with your State MEP system to correct it. Data within MSIX cannot be altered.