MSIX User Access Guide and Application

MSIX

M S I X
Migrant Student
Information Exchange

MSIX User Access
Guide and Application

July 20XX

"MSIX IS ONLY AVAILABLE TO AUTHORIZED USERS"

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MSIX Application Procedure Overview

The MSIX Application Procedure is composed of three processes: Applicant, Verifying Authority, and Final Approving Authority. These processes are discussed in further detail in this guide to provide the steps for obtaining access to MSIX.

Roles in Application Procedure

The following key players participate in the Application Procedure:

- **Applicant** – the potential user requesting access to MSIX

- **Verifying Authority** – the Applicant's direct supervisor or an individual that is above the direct supervisor in an official reporting structure who verifies the Applicant's identification, attests to their need for an MSIX account, and confirms the Applicant has the right level of access

- **Final Approving Authority** – the State or Regional User Administrator who gives final approval and creates the Applicant's account

Each of the roles plays a critical part in the application process. The *"User Application for Access to MSIX"* application form is also included at the end of this guide.

Application Procedure

The steps below outline the complete application process:

STEP 1: Applicant Information
- The Applicant completes the Applicant Information and signs the form (see page 13).
- The Applicant forwards the form to a Verifying Authority. This should be the Applicant's direct supervisor or an individual that is above the direct supervisor in an official reporting structure. The Applicant must provide appropriate identification (such as state/district identification badge, passport, driver's license, etc.) to verify their identity.

STEP 2: Identification Verification and Attestation
- The Verifying Authority completes his/her own information, reviews the entire application for completeness and accuracy, confirms the Applicant's identification, attests to the Applicant's need of an MSIX account, and confirms the right level of access.
- Upon completion, the Verifying Authority returns the form to the Applicant.

STEP 3: Forward Form to Approving Authority
- The Applicant locates his/her State/Regional Authority for final approval by going to the MSIX website: http://msix.gov.
- The Applicant clicks on the link labeled "How Do I Get An Account?" to access the contact information for their state.
- The Applicant forwards the form to the State/Regional Authority for final approval.

**STEP 4: State/Regional Authority Approval**

- The State/Regional Authority reviews the Applicant and Verifying Authority portions of the application for completeness, completes his/her own information, signs the form, and files it in his/her local records.
- The State/Regional Authority creates an MSIX account for the Applicant.
- The Applicant receives two emails: one with his/her MSIX User Name and the other with his/her initial Password.

MSIX Account Creation Hierarchy

The figure below displays the account creation hierarchy within MSIX. The OME User Administrator is responsible for creation and maintenance of the State User Administrators.
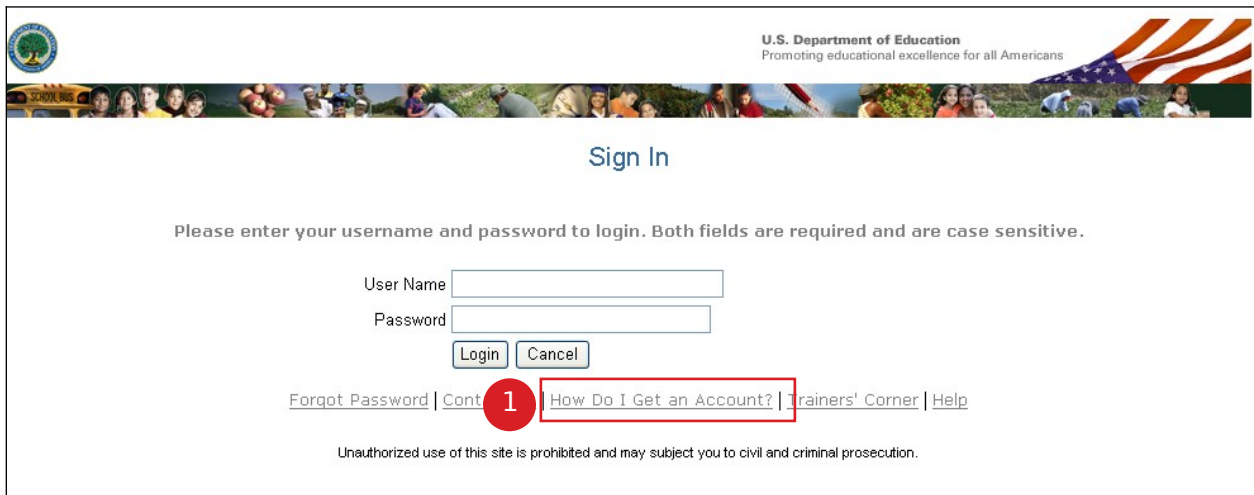
The State User Administrators role differs depending on the use of the MSIX regional structure. If a state does not use the Regional User Administrator role, then the State User Administrator is responsible for the creation and maintenance of all additional roles.
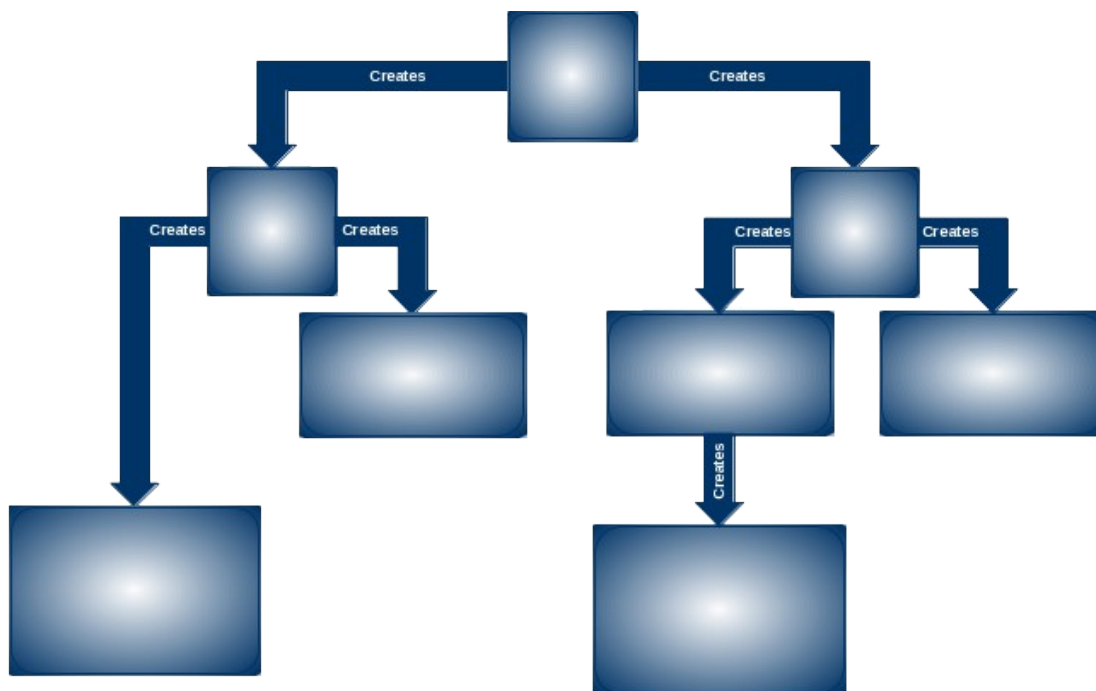
1) Applicant Process

Obtain Application

Applications for access to MSIX can be obtained through the MSIX Sign In screen (msix.ed.gov). No login is required and the application form is downloadable from the <u>How Do I Get an Account?</u> link.

Complete Application

The form is a guideline created to help states with the user registration process. If this form is used, it must be completed in its entirety. The form below displays all of the fields to be completed by the applicant:

Applicant Information				
• Complete the applicant information below and sign the form. • Forward the form to a Verifying Authority. This should be your direct supervisor or an individual that is above the direct supervisor in an official reporting structure. Provide appropriate identification information.				

First Name			Last Name	
Title				
Work Address	*Street*	*City*	*State*	*Zip*
Work Email		Work Telephone	*XXX-XXX-XXXX* - - Ext.	
Region (if applicable)		School District (if applicable)		

MSIX Account Information				
MSIX Role(s)	☐ MSIX Primary User ☐ MSIX Secondary User	☐ Regional User Administrator ☐ State User Administrator	☐ District Data Administrator ☐ Regional Data Administrator ☐ State Data Administrator	☐ State Region Administrator

Signature
I certify that this information is accurate and complete to the best of my knowledge. I will only use MSIX in accordance with the MSIX Rules of Behavior. Signature: _____   Date: _____

Application Information

- **First Name** and **Last Name** – the legal name of the individual requesting access to MSIX
- **Title** – the applicant's job title or description such as Teacher, Guidance Counselor, or Student Registrar
- **Work Address** – the street, city, state and zip code of applicant's workplace
- **Work Email** – the applicant's workplace email address
- **Work Telephone** – the applicant's workplace telephone number

The address, email, and telephone number provided on the application may be used to contact the applicant about MSIX matters.

MSIX Account Information

- **Region** and **District** – the region and district where the applicant works

Both fields are optional for roles that are not region or district specific; not all states have a regional structure.

- **MSIX Role** – the desired MSIX user role(s) – see Table 1, *"MSIX User Roles and Responsibilities."*

Signature

- **Signature** – the applicant's certification that the information provided is accurate and complete
- **Date** – the date the applicant signed the application

Once an MSIX user account has been created, the user can update their phone number and password using the **My Account** page in MSIX. Users will need to contact a User Administrator to make any other changes to their account, such as changes to their name, work address, or email address.

MSIX User Roles and Responsibilities			
User Role	**Description**	**Functions Allowed**	**Potential Users**
State User Category			
MSIX Primary	MSIX Primary Users can query student records in all states. This role can also initiate the merge and split process for student records in their state.	▪ Search, display, and print student records ▪ Export a student record to a file for load into a state system ▪ Email notification of a student arrival ▪ Initiate merge and split of student records	▪ Guidance Counselors ▪ MEP Data Entry Staff ▪ Recruiters ▪ Registrars ▪ Teachers
MSIX Secondary	MSIX Secondary Users can query student records in all states.	▪ Search, display, and print student records for students in all states ▪ Email notification of a student arrival	▪ Guidance Counselors ▪ MEP Data Entry Staff ▪ Recruiters ▪ Registrars ▪ Teachers
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. This role can also resolve data quality issues and serve as the primary point of contact for escalation issues.	▪ Search, display, and print student records ▪ Export a student record to a file for load into a state system ▪ Email notification of a student arrival ▪ Initiate merge and split of 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	▪ State MEP Administrators ▪ MEP Data Entry Staff
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 state. This role also serves as the secondary point of contact for escalation issues.	▪ Search, display, and print student records ▪ Export a student record to a file for load into a state system ▪ Email notification of a student arrival ▪ Initiate merge and split of student records ▪ Generate Data Reports ▪ Initiate merge and split of student	▪ State MEP Administrators ▪ MEP Data Entry Staff

MSIX User Roles and Responsibilities			
User Role	**Description**	**Functions Allowed**	**Potential Users**
		records ▪ Validate or reject record near matches, merges and splits ▪ Resolve data quality issues	
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 state.	▪ Search, display, and print student records ▪ Export a student record to a file for load into a state system ▪ Email notification of a student arrival ▪ Initiate merge and split of student records ▪ Initiate merge and split of student records ▪ Validate or reject record near matches, merges and splits ▪ Resolve data quality issues	▪ State MEP Administrators ▪ MEP Data Entry Staff
State Region Administrator	State Region Administrator establishes and maintains the regional structure and associated districts for states that choose to use regions.	▪ Enable and disable regional structure ▪ Create new regions ▪ Associate districts to regions ▪ Edit regions	▪ State identified
State User Administrator	State User Administrators establish and manage user accounts for users in their state.	▪ Create user accounts ▪ Assign role(s) ▪ Update user account information ▪ Deactivate user accounts ▪ Reset passwords	▪ State identified
Regional User Administrator	Regional User Administrators establish and manage user accounts for users in their region.	▪ Create user accounts ▪ Assign role(s) ▪ Update user account information ▪ Deactivate user accounts ▪ Reset passwords	▪ State identified

Table 1 – MSIX User Roles and Responsibilities

Submit to Verifying Authority

The identity of MSIX Applicants should be verified and the type of MSIX access requested must be reviewed. The Applicant's direct supervisor or an individual that is above the direct supervisor in an official reporting structure should perform the identity verification and application review. Further, they attest to the Applicant's need for MSIX and confirm that the correct user roles have been requested. For example, an applicant who is a teacher should submit the application to his or her principal for identity verification and review, or an applicant who is a state MEP administrator should submit to his or her MEP Director for identity verification and review.

2) Verifying Authority Process

Verify Applicant Identity and User Role

When approving an application, the Verifying Authority should verify the user's identity (e.g., reviewing their State/District issued ID badge, driver's license, passport, etc.). As approver of system access, the Verifying Authority is responsible for verifying the Applicant's identity. The person responsible for approving access for an identified resource can be held accountable for the actions of that user. The Verifying Authority must review each field of the application for accuracy and completeness. The Verifying Authority will also verify that the Applicant's MSIX role is appropriate for their job.

Complete Verifying Authority Portion of Application

Upon successful verification of identity, the Verifying Authority will complete the Identification and Attestation portion on the second page of the application. Upon completion, they should retain a copy of the application for their local records.

Identification Verification and Attestation

- As the Verifying Authority, you should be the Applicant's direct supervisor or an individual that is above the direct supervisor in an official reporting structure.
- Review the entire application for completeness and accuracy.
- Complete the information below, confirm the Applicant's identification, attest to his/her need of an MSIX account, and confirm that the Applicant has the right level of access.
- Upon completion, file the form in your local records and return this form to the Applicant.

Verifying Authority First Name		Verifying Authority Last Name	
Title			
Work Email		Work Telephone	*XXX-XXX-XXXX* **-** **-** Ext.
Organization		Applicant Identity Verification Method	☐ State Driver's License ☐ State / District ID ☐ Passport ☐ Other: _____
Account Effective Date (optional)		Account End Date (optional)	

Signature

I certify that: 1) I have verified the identity of the above applicant; 2) I have determined that he or she has a need for MSIX information; and 3) the above-mentioned individual is requesting the appropriate MSIX role(s).

Signature: _____   Date: _____

Identification Verification and Attestation

- **Verifying Authority First Name** and **Verifying Authority Last Name** – the legal name of the Verifying Authority reviewing the application

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- **Title** – the official title or position of the Verifying Authority
- **Work Email** – the Verifying Authority's work email address
- **Work Telephone** – the Verifying Authority's workplace telephone number

  The phone number may be used if the Verifying Authority needs to be contacted about MSIX matters.
- **Organization** – the organization or entity that employs the Verifying Authority
- **Applicant Identity Verification Method** – the type of ID or method used to verify the identity of the applicant
- **Account Effective Date** and **Account End Date** – optional fields that can be used to designate a known future start or end date for a user account

  For instance, a future Account End Date may be entered for a seasonal employee that will no longer need access to MSIX after the summer months.

Signature

- **Signature** – the Verifying Authority's certification that the information provided is accurate and complete
- **Date** – the date the applicant signed the application

Applicant Submits Application

Each state may have State User Administrators, Regional User Administrators, or both. The User Administrator will create an account in MSIX for the Applicant requesting access based on information provided in the application. The application should be delivered to the User Administrator's office.

To find the contact information for a State or Regional User Administrator, click on the **How Do I Get an Account?** link from the MSIX home page (msix.ed.gov), or contact the state's Migrant Education Program office.

3) Approving Authority Process

Review Complete Application

The User Administrator will review the application received to verify that both the Applicant and Verifying Authority sections are complete. If any problems are identified during the review, the User Administrator will contact the Applicant and/or the Verifying Authority that reviewed the application.

Upon successfully completing the review, the User Administrator will create account(s) for the Applicant requesting access to MSIX based upon the information provided in their application.

State/Regional Authority Approval						
• Review the Applicant and Verifying Authority portions of the application for completeness. • Complete the information below, sign, and file the form in your local records. • Create an MSIX account for the Applicant.						
Approving Authority First Name			Approving Authority Last Name			
Title				Role	☐ Regional User Administrator ☐ State User Administrator	
Work Address	*Street*			*City*	*State*	*Zip*
Work Email				Work Telephone	*XXX-XXX-XXXX* **-** **-** Ext.	
Signature						
I certify that this information is accurate and complete to the best of my knowledge and I hereby grant to the above-mentioned individual the MSIX role for which they have applied. Signature: _____ Date: _____						

State/Regional Authority Approval

- **Approving Authority First Name** and **Approving Authority Last Name** – the legal name of the Approving Authority reviewing the application
- **Title** – the official title or position of the Approving Authority
- **Role** – the position of the Approving Authority representing either the regional or state level
- **Work Address** – the street, city, state and zip code of Approving Authority's workplace
- **Work Email** – the Approving Authority's work email address
- **Work Telephone** – the Approving Authority's workplace telephone number
  The phone number may be used if the Approving Authority needs to be contacted about MSIX matters.

Signature

- **Signature** – the Approving Authority's certification that the information provided is accurate and complete
- **Date** – the date the applicant signed the application

Next Steps

Once the user account information has been successfully entered into MSIX, the User Administrator will be taken to a Confirmation page that indicates that the new account was successfully created. MSIX will generate an email notification to the new user, using the email address entered by the User Administrator, to notify them of their new MSIX Username and provide information about accessing MSIX. The user administrator will be copied on this message as an additional confirmation that the account was created and the new user notified. MSIX will generate a second separate email message to the new user only, containing the initial password for their new MSIX account. The new MSIX user will be required to reset this password when they first access MSIX.

User Application for Access to MSIX

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- The Applicant locates his/her State/Regional Authority for final approval by going to the MSIX website: http://msix.gov.
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- The State/Regional Authority creates an MSIX account for the Applicant.
- The Applicant receives two emails: one with his/her MSIX User Name and the other with his/her initial Password.

Applicant - Instructions to the Applicant

Applicant Information
- Complete the applicant information below and sign the form.
- Forward the form to a Verifying Authority. This should be your direct supervisor or an individual that is above the direct supervisor in an official reporting structure. Provide appropriate identification information.

First Name		Last Name	
Title			
Work Address	*Street*	*City*	*State* *Zip*
Work Email		Work Telephone	*XXX-XXX-XXXX* - - Ext.
Region (if applicable)		School District (if applicable)	

MSIX Account Information

MSIX Role(s)	☐ MSIX Primary User ☐ MSIX Secondary User	☐ Regional User Administrator ☐ State User Administrator	☐ District Data Administrator ☐ Regional Data Administrator ☐ State Data Administrator	☐ State Region Administrator

Signature

I certify that this information is accurate and complete to the best of my knowledge. I will only use MSIX in accordance with the MSIX Rules of Behavior.

Signature: _____ Date: _____

The Privacy Act of 1974 (5 U.S.C. § 552a)

Verifying Authority - Instructions to the Verifying Authority

Verifying Authority First Name		Verifying Authority Last Name	
Title			
Work Email		Work Telephone	*XXX-XXX-XXXX* **-** **-** Ext.
Organization		Applicant Identity Verification Method	☐ State Driver's License ☐ State / District ID ☐ Passport ☐ Other: _____
Account Effective Date (optional)		Account End Date (optional)	

Signature

I certify that: 1) I have verified the identity of the above applicant; 2) I have determined that he or she has a need for MSIX information; and 3) the above-mentioned individual is requesting the appropriate MSIX role(s).

Signature: _____ Date: _____

Final Approving Authority - Instructions to the Final Approving Authority

Approving Authority First Name		Approving Authority Last Name			
Title			Role	☐ Regional User Administrator ☐ State User Administrator	
Work Address	*Street*	*City*		*State*	*Zip*
Work Email		Work Telephone	*XXX-XXX-XXXX* **-** **-** Ext.		

Signature

I certify that this information is accurate and complete to the best of my knowledge and I hereby grant to the above-mentioned individual the MSIX role for which they have applied.

Signature: _____ Date: _____

The Privacy Act of 1974 (5 U.S.C. § 552a)

Privacy Act Statement

Public Burden Statement

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. Public reporting burden for this collection of information is estimated to average 20 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The obligation to respond to this collection is required to obtain or retain benefit under P.L. 107-110, Section 1308b, Elementary and Secondary Education Act (as amended) by the No Child Left Behind Act. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Education, 400 Maryland Ave., SW, Washington, DC 20202-4536 or email ICDocketMgr@ed.gov and reference the OMB Control Number 1810-0686. Note: Please do not return the completed MSIX Application to this address.