

Approving a New MSIN Account

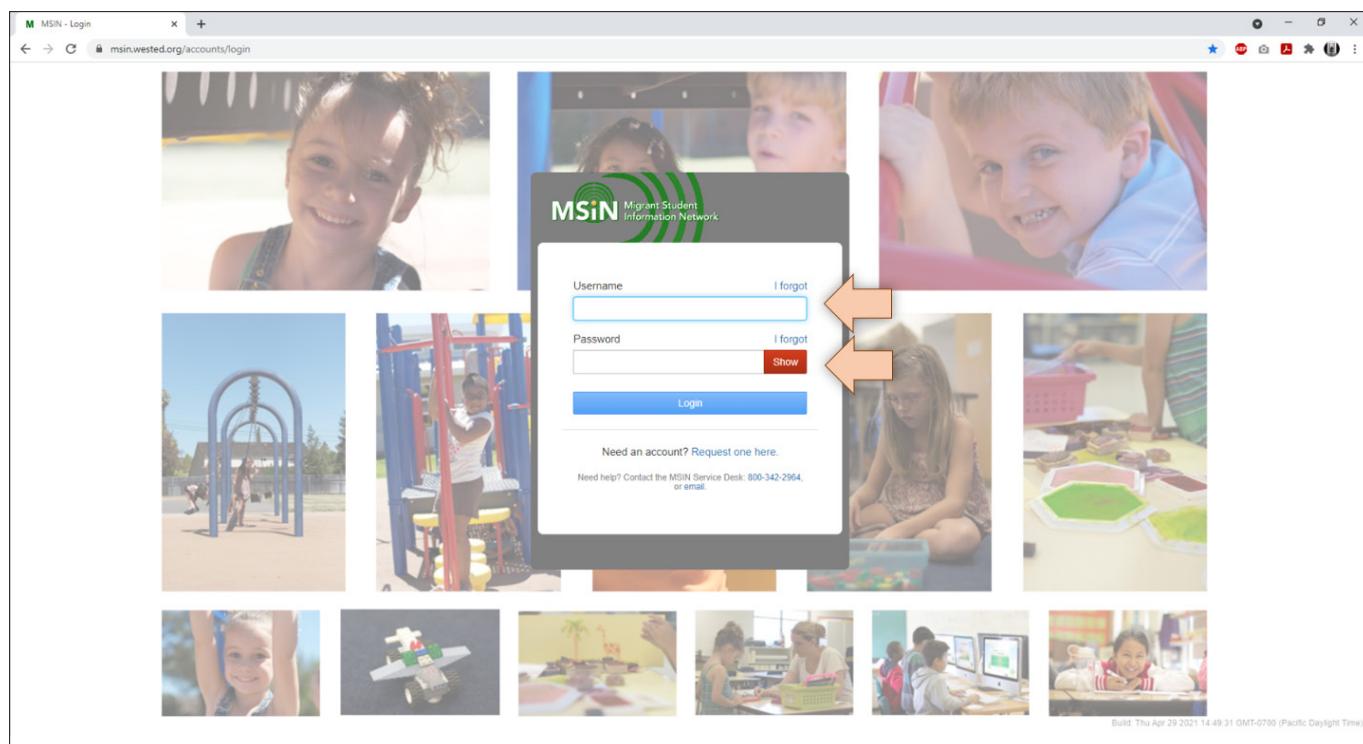
Introduction

The Migrant Student Information Network (MSIN) is an online system for Migrant Education Program (MEP) staff and organizations that work with migratory children and youths. This how-to-guide will walk you through the account approval process at the subgrantee level. The same steps apply to both the MSIN 6.0 site and the Training MSIN sister site, which is used to practice entering and retrieving data. Note that you must be assigned the Regional User Approver role in MSIN 6.0, or Training MSIN, to perform the following steps.¹

STEP 1: LOG IN TO MSIN 6.0

Enter the following address in your web browser: <https://msin.wested.org/>

Log in using your MSIN 6.0 username and password.



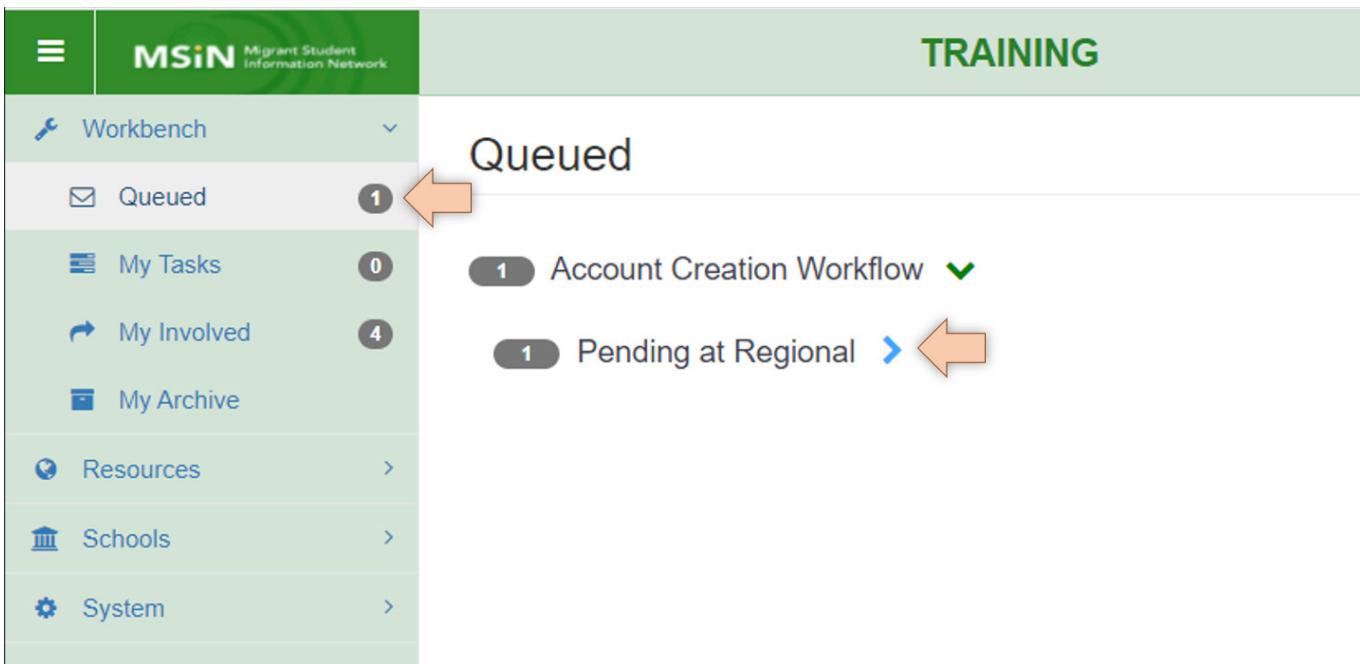
STEP 2: SELECT AN ACCOUNT APPLICATION FROM THE QUEUED FOLDER IN THE WORKBENCH

Pending account applications for your region or direct-funded district (DFD) will be found in your Queued folder. From the left-side menu, select “Workbench” and “Queued” to view the “Account Creation Workflow.” Click on “Pending at Regional” to view a list of worklist items representing new user applications.

¹ The Regional User Approver role is very important. Therefore, MEP Directors should assign this system role to one or more MEP staff who work closely with the local management team to ensure that access to their student data is limited to the appropriate people.

TRAINING

Queued



Workbench

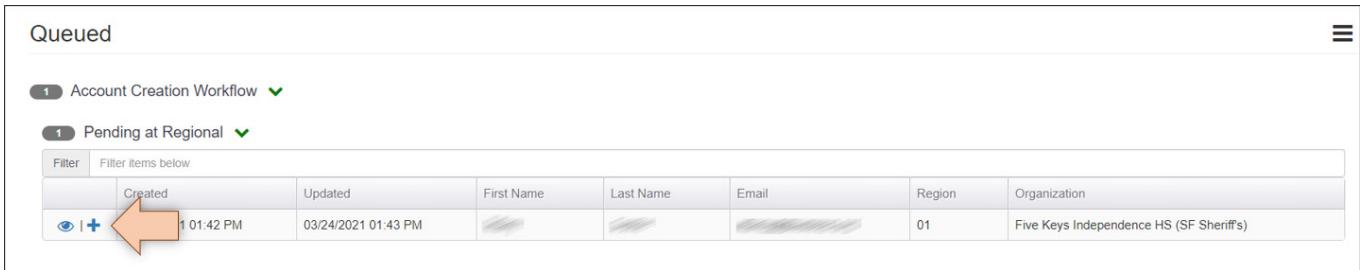
- Queued (1)
- My Tasks (0)
- My Involved (4)
- My Archive
- Resources >
- Schools >
- System >

1 Account Creation Workflow ✓

1 Pending at Regional >

Before you begin reviewing an account application, you must first add the worklist item to your “My Tasks” folder. Click on the plus sign (+), as shown below, to claim the worklist item.

Queued

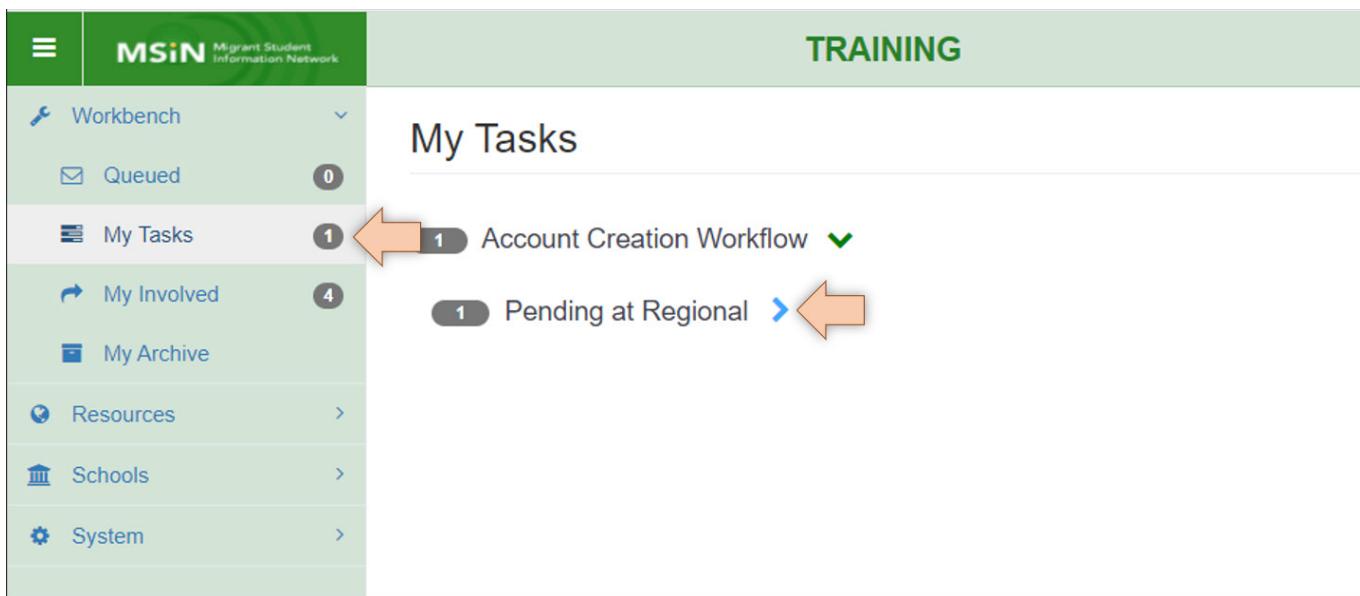


| Created | Updated | First Name | Last Name | Email | Region | Organization |
|----------|---------------------|------------|------------|------------|--------|---|
| 01:42 PM | 03/24/2021 01:43 PM | [REDACTED] | [REDACTED] | [REDACTED] | 01 | Five Keys Independence HS (SF Sheriffs) |

STEP 3: REVIEW THE ACCOUNT APPLICATION

Open the Account Application

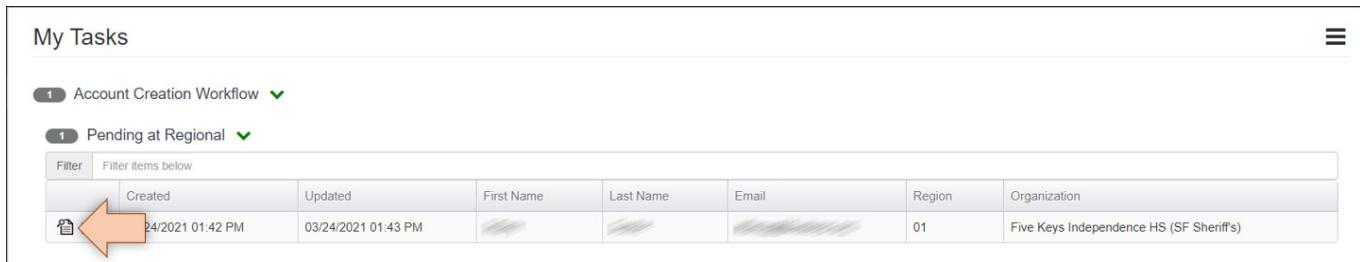
From the left-side menu, click on “Workbench,” then “My Tasks” to view the account application that you added to your “My Tasks” folder. Click on “Pending at Regional,” to view the application, as shown below.



My Tasks

- 1 Account Creation Workflow
- 1 Pending at Regional

To begin reviewing the account application, click on the document icon, as illustrated in the image below.



| Created | Updated | First Name | Last Name | Email | Region | Organization |
|---------------------|---------------------|------------|------------|------------|--------|--|
| 03/24/2021 01:42 PM | 03/24/2021 01:43 PM | [redacted] | [redacted] | [redacted] | 01 | Five Keys Independence HS (SF Sheriff's) |

The following screenshot shows how the application information is organized. It also includes sections that must be completed by the Regional User Approver. The top section provides a summary of the account information. The middle section allows you to assign user roles, sign the form, and determine next steps for the account application, such as “Send to WestEd Approver for Final Approval,” “Deny Account Request,” or “Send back to Requester for more information.” The bottom section of this screen is optional and may be used to add comments about your review and decision.

TRAINING

Current Editor: Victor Garibay (vgariba)
Region: Santa Clara County Office of Education (01)

MEP/School Application

Account Request Information

| | |
|----------------|---|
| Name | Victor Garibay |
| Work Email | vgariba@sccoe.org |
| Work Address | 12345 1st Street Los Angeles CA, 90033 |
| Work Telephone | 323-456-1234 |
| Title | Service Manager |
| Signature |  |

[Edit](#)

Local Approver: Victor Garibay (vgariba) (Regional User Approver)
Organization: Five Keys Independence HS (SF Sheriff's)

Applicant Role(s):

Data Specialist i Regional User Approver i
 Designated SEA Reviewer i
 General User i
 I&R Manager i
 INA/ILP Support i
 Office Support i
 Program Manager i
 Recruiter i
 Student Services i
 Viewer i

Next Step:
- Choose Decision -
Note: One or more Applicant Role(s) is required to send to WestEd for approval.

Comments

New Comment

Build: Thu Apr 29 2021 14:52:40 GMT-0700 (Pacific Daylight Time)

Assign User Role(s)

Use the check boxes to the left of each role to assign role(s) to the applicant. To get a description of each user role, hover your cursor over the “i” next to the role. Consult the user guides and tables on the MSIN home page for more details regarding the MSIN features available to each role, as needed. In addition, we strongly recommend that Regional User Approvers consult with their local management team to decide the appropriate level of access for all new users.



Currently, you may assign one, or more, of the following roles to a new account:

- Data Specialist
- Designated SEA Reviewer
- General User
- I&R Manager
- INA/ILP Support
- Program Manager
- Recruiter
- Student Services
- Viewer
- Regional User Approver

| Applicant Role(s): | |
|-------------------------------------|---|
| <input type="checkbox"/> | Data Specialist i |
| <input type="checkbox"/> | Designated SEA Reviewer i |
| <input type="checkbox"/> | General User i |
| <input type="checkbox"/> | I&R Manager i |
| <input type="checkbox"/> | INA/ILP Support i |
| <input type="checkbox"/> | Office Support i |
| <input type="checkbox"/> | Program Manager i |
| <input type="checkbox"/> | Recruiter i |
| <input type="checkbox"/> | Student Services i |
| <input type="checkbox"/> | Viewer i |
| <input checked="" type="checkbox"/> | Regional User Approver i |

STEP 4: DETERMINE THE NEXT STEP FOR THE ACCOUNT APPLICATION

Next, you will be asked to choose the next step for the account application. Select from one of the following options:

- “Send to WestEd Approver for Final Approval”
- “Deny Account Request”
- “Send back to Requester for more information”

Next Step:

- Choose Decision -
Submit

- Choose Decision -

Send to WestEd Approver for Final Approval

Deny Account Request

Send back to Requester for more information

STEP 5: SIGN THE APPLICATION AND SUBMIT YOUR DECISION

After you select the next step for the account application, additional boxes will appear above the drop-down menu. These boxes will vary depending on whether you select “Send to WestEd Approver for Final Approval,” “Deny Account Request,” or “Send back to Requester for more information.”

If you select “Send to WestEd Approver for Final Approval”

A signature box will appear, as shown below. Use your mouse or touchscreen to sign. If you have a signature pad, select the “Capture by Device” button to sign. Once you are satisfied with your signature, click on the blue “Sign” button. You have the option to clear your signature if you want to start over by clicking the red “Clear” button. After you have signed the application, click on the green “Submit” button.

Clear
Sign
Capture by Device

Next Step:

 Send to WestEd Approver for Final Approval

Submit

Once you click “Submit,” the system will confirm that you want to “Send to WestEd Approver for Final Approval.” Select “Confirm.” After you confirm, the system will automatically notify WestEd about the pending request for a new MSIN account.

If you select “Deny Account Request”

A box titled “Reason for denying this Account Request” will appear, as shown in the image below. Enter your reason for denying the account request, then click the green “Submit” button. Once you click “Submit,” the system will ask you to confirm your decision. Click “Confirm” to deny the request. The system will automatically generate an email notifying the applicant that their account request was denied. This email will include the exact language that you enter in the “Reason for denying this Account Request” field.

Reason for denying this Account Request

Enter your reason here.

Next Step:

Deny Account Request Submit

Note: Reason is required.



If you select "Send back to Requester for more information"

A box titled “Reason for returning this Account Request to Requester” will appear, as shown below. Enter your reason for sending the account request back to the requester, then click the green “Submit” button. Once you click “Submit,” the system will ask for your confirmation. Click “Confirm” to send the account request back to the requester. The system will automatically generate an email notifying the applicant that their account request was sent back for more information. This email will include the exact language that you enter in the “Reason for returning this Account Request to Requester” field.

Reason for returning this Account Request to Requester

Enter your reason here.

Next Step:

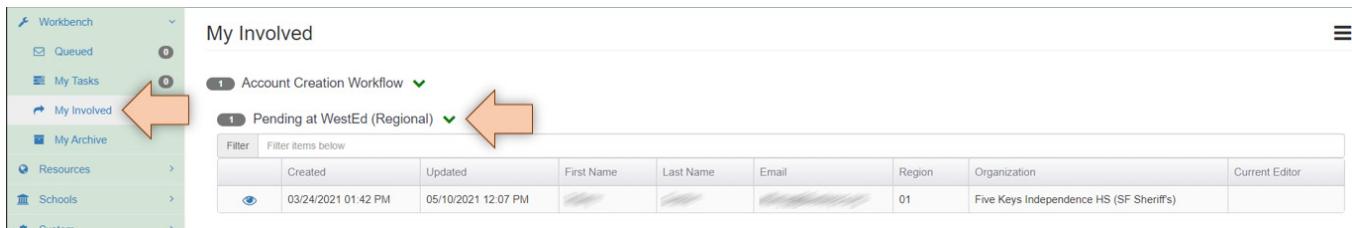
Send back to Requester for more information Submit

Note: Reason is required.

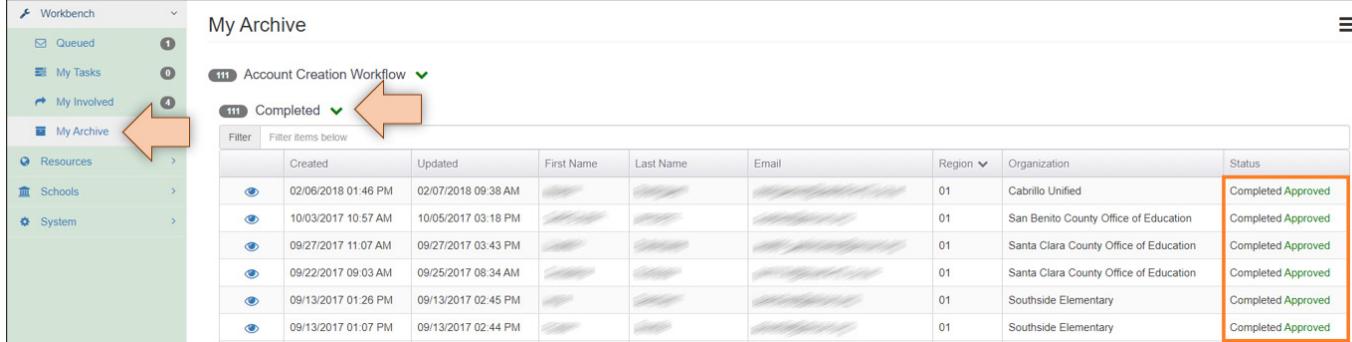


STEP 6: REVIEWING PROCESSED ACCOUNT APPLICATIONS

After you have processed the new account application, you may want to refer to it or check its status. Applications that have been sent to WestEd for final approval can be found in your “My Involved” folder. On the left-side menu, click on “Workbench,” then “My Involved,” as shown in the screenshot below. Under “Account Creation Workflow,” click on “Pending at WestEd (Regional).” This will show a list of all pending applications that you have approved but are waiting for WestEd’s final approval.



Account applications that you and/or WestEd have approved or denied (i.e., are in Completed state) will appear in your “My Archive” folder. On the left-side menu, click on “Workbench,” then “My Archive,” as shown below. Under “Account Creation Workflow,” click on “Completed” to see a list of account applications that are now in Completed state, which means they have gone through the entire account review process.



| Created | Updated | First Name | Last Name | Email | Region | Organization | Status |
|---------------------|---------------------|------------|------------|------------|--------|--|--------------------|
| 02/06/2018 01:46 PM | 02/07/2018 09:38 AM | [REDACTED] | [REDACTED] | [REDACTED] | 01 | Cabrillo Unified | Completed Approved |
| 10/03/2017 10:57 AM | 10/05/2017 03:18 PM | [REDACTED] | [REDACTED] | [REDACTED] | 01 | San Benito County Office of Education | Completed Approved |
| 09/27/2017 11:07 AM | 09/27/2017 03:43 PM | [REDACTED] | [REDACTED] | [REDACTED] | 01 | Santa Clara County Office of Education | Completed Approved |
| 09/22/2017 09:03 AM | 09/25/2017 08:34 AM | [REDACTED] | [REDACTED] | [REDACTED] | 01 | Santa Clara County Office of Education | Completed Approved |
| 09/13/2017 01:26 PM | 09/13/2017 02:45 PM | [REDACTED] | [REDACTED] | [REDACTED] | 01 | Southside Elementary | Completed Approved |
| 09/13/2017 01:07 PM | 09/13/2017 02:44 PM | [REDACTED] | [REDACTED] | [REDACTED] | 01 | Southside Elementary | Completed Approved |

Resources

Before approving a new account request in the production MSIN site for the first time, we strongly recommend practicing on the Training MSIN site (<https://trainingmsin.wested.org>). Training MSIN is a safe place to refresh your knowledge about approving account requests or any other system feature.

If you have specific questions not covered in this guide, please collaborate with a local MSIN Power User. For any remaining questions or concerns, feel free to contact the MSIN Service Desk by email (msinsupport@wested.org) or phone (1-800-342-2964, option 1).