Center for Educational Performance and Information (CEPI)

Michigan Student Data System (MSDS) District User Training Manual

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Questions:
Email: cepi@michigan.gov
Phone: 517-335-0505 x3
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Introduction

The Center for Educational Performance and Information (CEPI), Michigan Department of Education (MDE), and local school districts have worked together to develop the Michigan Student Data System (MSDS) as the application districts use for state and federal student data reporting. Data collected in this system are vital to district success.

This web-based system ensures the secure collection of student record data, providing for maintenance of student records through file upload and online entry, error checking and data correction, as well as enhanced reporting on submitted data.

The MSDS provides multiple levels of permissions, enabling districts to distribute or centralize their work and providing flexibility for districts to determine where additional MSDS users are required. Access is available to authorized users and the public. Public users can access full-time equivalency (FTE) data via the Audit Form (DS4061/DS4120), which is described in this document. All other functions are restricted to district authorized users.

This guide is designed for public school users of the MSDS. For nonpublic school users, please refer to the MSDS Nonpublic User Guide.

Your Account

To become an authorized user of the MSDS, you must do the following:

1. Request access to the application through your MIlogin account.
2. Send the appropriate security agreement form (Public school or Nonpublic school users) to CEPI, signed by yourself and the district lead administrator. These forms are posted in CEPI’s Application Security Forms web page.

You will receive access to the application when both above steps have been completed and verified by CEPI. For more detailed information, please refer to the MIlogin User Guide posted in the Manuals section of CEPI’s MSDS web page.

Changing Your Password

To change your MIlogin password:

2. Enter your MIlogin ID and password. (Password is case sensitive.)
3. Click on "Account Maintenance."
4. Click on "Change My Password."
5. Note: After you create a MIlogin account, only you can update the account information. If your email address or telephone number changes, be sure to log in to the MIlogin site and edit your account. If you do not remember your
password, please go to the login page and click the “Forgot your password” link.

For more detailed information, please refer to the MIlogin User Guide posted in the Manuals section of CEPI’s [MSDS web page](#).

**Help and Resources**

Each MSDS collection contains its own user guide, XML schemas and sample files. These resources can be found by going to CEPI’s [MSDS web page](#) and clicking the desired collection on the left-hand side.

The MSDS Collection Details Manual provides guidance for all components and characteristics collected in MSDS. It is separated into sections which cover component descriptions, characteristic descriptions and appendix documents. You may access this manual by going to CEPI’s [MSDS web page](#) under the “Manuals” section, or by going directly to the [MSDS Collection Details Manual](#).

If you have questions not covered by this manual and our other posted support material, please contact our customer support team at cepi@michigan.gov. Email allows us to better research and respond to your questions, but if email is not an option, you can call us at 517-335-0505 x3.

**Logging In to MSDS**

To access the MSDS, go to MIlogin, enter your MIlogin user ID and password, and then click the login button. Once logged in, click on the “Michigan Student Data System (MSDS)” link to access the application. After clicking on the link, a new window should open to the MSDS home page.

If the MSDS home page does not come up, please check to make sure that you don’t have a pop-up blocker turned on that might be preventing that new window from opening.

If you are logging into the MSDS for the first time (or every 90 days), a FERPA message will display. Review the regulations and verify your agreement to comply with the requirements by clicking the button at the bottom of the agreement.
Navigating the MSDS Home Page

Various links and menus are available on the MSDS home page for all users to navigate through the Web pages. However, some menus and functionality are limited to users with appropriate permissions. For example, only users with an ISD Auditor role may access the Audit Narrative.

Page Links

The following links are found just below CEPI’s logo at the top of the page:

1. Michigan.gov Home
   Displays the official Web page of the State of Michigan. (This link is also available at the bottom of the web page.)
2. CEPI Home
   Displays CEPI’s home page.
3. STARR Home
   Displays the STARR home page
4. MSDS Home
   Links the user back to the CEPI MSDS web page.
5. User Guide
   Displays the MSDS District User Training Manual.
6. Help
   Opens the help system for individual MSDS screens. (This link is also available at the bottom of the web page.)
7. Contact CEPI
   This link opens a web page indicating how you can contact CEPI’s
customer support team. It includes the phone number and email address. (This link is also available at the bottom of the web page.)

(8) Glossary
Opens a reference document that describes the terms unique to CEPI.

(9) Log Off
Ends current login session. (This link is also available at the bottom of the web page.)

In addition to the links at the top of the MSDS home page, there are links available at the bottom of the page. These include:

(1) About Us
CEPI’s State of Michigan home page.

(2) State Web Sites
State of Michigan web page that contains links to State of Michigan websites.

(3) Accessibility Policy
State of Michigan web page with information on the State’s Accessibility Policy.

(4) Privacy Policy
State of Michigan web page with information on the State’s Privacy Policy.

(5) Link Policy
State of Michigan web page with information on the State’s Terms of Use and Linking Policy.

(6) Security Policy
State of Michigan web page with information on the State’s Security Policy.

Menu Items
To use the navigational menu at the left of the MSDS screen, click the desired item. Any menu item with the + will expand to display further options. Items available in the menus and submenus vary based on the user’s permissions.

Changing Profiles
Depending on the access given to each user, multiple profiles may have been created. If more than one profile is available, you do not have to log out to change profiles. Simply click the Profile link at the top of the page which displays the profile name. This will allow for the selection of another profile.
What’s New

A list of important news will appear on the Home page under the “What’s New” section. Updates pertaining only to authorized users will appear after the user has successfully logged in to the MSDS application. Examples of “What’s New” information include collection timelines as well as any updates to the system. To view all the items in the “What’s New” section, click on the View All button.

Using MSDS Help - Characteristic Level

Characteristic Level Help is available to provide information related to any characteristic that has a question mark icon displayed to the right of it. This is most common in the Data Staging Area. To access the help section for a characteristic, click the question mark icon appearing to the right of the desired characteristic.

A window will open describing the characteristic in greater detail. This window will include:
- The characteristic Label that is used on the screen
- The characteristic Name
- The characteristic Data Type
- A description of the characteristic
- Instructions related to the characteristic
- The permissions that you, as a user, have for working with this characteristic

![Characteristic Help](image-url)
Student Search

MSDS provides a student record search function to view data associated with a student. This feature is used to accomplish a variety of tasks, including the following:

- Determining whether a newly enrolled student has been assigned a UIC.
- Determining whether a student has been directly certified to receive free school meals (available to users with the supplemental nutrition role only).
- Determining which data was last reported for a student.

Student records can be searched by UIC or by core fields such as name, gender and date of birth. Users are also able to search using match criteria, as well as view Direct Certification information (available to users with the supplemental nutrition role only).

Search by UIC or Core Fields

1. To begin, enter a student’s full 10-digit UIC or enter the student’s core fields (name, date of birth, gender). When searching by core fields, partial information may be entered in the name fields. This partial search is recommended if a student’s name could easily be misspelled. Additionally, you may toggle between the “begins” and “contains” options for the first name and last names. For example, searching for “Jones” with the “contains” option would display any student with “Jones” anywhere in their name (such as “Smith-Jones”). If you want to clear all fields to update the search fields, you can either click the Clear button or clear them manually, then restart Step 1.

2. Once you have entered your search criteria, click the Filter button (or press the Enter key).

3. Your search results will be returned.
Once the results are displayed, you may perform one of the following actions:

- Click the UIC hyperlink to access the Student Details page for this student.
- Perform another student search by clicking on the Filter button (or click the Student Search menu item).

**Search Yielding No Results**

If your search for a student did not yield any results, the following message will display. You may click the Cancel button and try another search, or click the Add This Student button to add a student to the MSDS. For more information on adding students, please see the “Adding New Students” section of this manual.

**Student Details**

This page contains basic information on the searched student, including demographics, where the student was last reported, and when the student record was created and last updated.
After viewing the data, you may either view the student history by clicking the “View Student History” button, or click the “Back to Search Results” button.

**Student History**

The MSDS keeps track of all student history for each UIC going back to the 2002-03 school year. At the top of the screen, basic demographic data, Primary Education Providing Entity (PEPE) district/building and Cohort Status/Year are displayed. Under the Action dropdown, users may request to link UICs if the same student has multiple UICs. For more information on this feature, please see the UIC Linking/Unlinking section of this manual.
Below the Action dropdown, each collection will display for which the student has been submitted.

If your district is the PEPE for this student, each collection will have a hyperlink that, when clicked, will take you to the Student History Collection Details page where you can view all data on the student record for that collection. If your district is not the PEPE, but has submitted data for the student in the past, only those collections will contain a hyperlink.

Tabs under the listed information will provide you with additional data, including programs, curriculum, discipline and more.
Student Search using Matching Criteria

Users can also search using the same UIC matching process that all records are processed through when submitted into the staging area. When performing a standard search, the system only returns results that are an exact match to the core fields you have entered. Conversely, searching using the matching criteria may return results that are both exact matches and close matches (see example below). As this feature uses additional system resources, it is only run when selected by the user and may take additional time to return results.

To use this feature, you must enter the Last Name, First Name, Date of Birth Year, Date of Birth Month, Date of Birth Day and Gender. Next, check the “Search using match criteria” box and then click the Filter button.
Searching for Johnny using the match criteria returns a record for John Doe. This is because Johnny is a synonym for John. Searching for Johnny using the standard search would not have returned a record for John.
Uploading Data

The first step in submitting student data in the MSDS is by either uploading a file or manually creating a collection and then adding the student records. This unit provides instructions on how to upload a file. For more information on how to create a collection, please refer to the “Data Staging Area” section of this manual.

The MSDS will only accept properly-formatted XML files. Simply saving data in Excel or Access to an XML format will not produce a valid XML file that conforms to the MSDS schema requirements. Most users who upload an MSDS file use their local student information system to export a valid file. You should contact your student information vendor for assistance with this process if you have any questions.

CEPI is unable to support or answer questions about local student information systems.

Uploading Your File

1. Click “Student Data Submission,” on the left navigation bar, then click “Upload File” to get to the SDS File Upload screen.
2. Select the desired collection from the first dropdown. You have the option to enter notes in the “User Notes” section. These notes will show up in the User Notes column of the Staging Area Detail page for all student records in the file.
3. Click the “Browse” button and browse to the upload file on your local computer or network. Select the file, then click “Upload File.”

4. Once the file has finished uploading, you will receive an “uploaded successfully” message like the one below. However, this message does NOT mean your file passed file-level validation; you must check the status of the file using Uploaded File Status, explained further below.

![File Upload Result](image)

CEPI offers a free XML Validation Tool, which is available for download on the MSDS web page. Click the “XML Validation Guide” link located in the Resources box, and follow the directions.

**Check Your Uploaded File Status**

Once you’ve uploaded your file, you can check the file status to see if it was accepted or rejected. Files can be rejected for various reasons.

**File-Level Validation Rules:**

- Each file is compared to the XML schema for the collection selected on the File Upload form. The file must conform to the schema requirements, or else the entire file will be rejected.
- The Submitting Entity Code on each student record is checked against the permissions of the user. If your file contains any records with a submitting entity code you don’t have permissions for, the file will be rejected.
- The same UIC, Last Name, First Name, Date of Birth, Gender, Operating District and School Facility Number may only be submitted once within the same upload file. If multiples exist, the file will be rejected.

You can check the status of your file on the File Upload Status screen. You can also view the errors for any rejected files.

1. Click “Student Data Submission” on the left navigation menu, then click “Uploaded File Status.”
2. Select the collection name from the dropdown and click the “Filter” button. (Alternately, you can enter your user name in the “Uploaded By” field to see all files you’ve uploaded. If you do this, make sure you match the way your user name is listed in your MSDS profile. You can also enter a date range or filter by the status. However, it’s often easiest to simply select the collection type and leave the rest of the fields alone.)
3. The File Upload Status screen will show all the uploaded files that match the selection criteria from step 2.

4. Possible Status messages include:
   - Written to Queue – Available for processing: Another file is being processed ahead of this one, and process will begin in the order received.
   - Processing: the file is currently being processed.
   - Processed Successfully: the file has been processed, and the records are now in your collection staging area.
   - Failed File Level Validation: the file failed.
   - A full list of messages can be found in Appendix A.

5. Click a file name to view the Upload Status Details and any error messages for that specific file.
6. Once you have successfully uploaded a file, you should open up the collection in the Data Staging Area to review your submitted records for any record-level errors or warnings.

**Append and Replace**

If the same submitting entity uploads data for the same student for a particular collection, the MSDS will Append and Replace the data on the student record. For example, if a user uploads a record for a student, and then later uploads additional components for the same student, those components will be added to the student record in the Staging Area. Any components that already exist for that student in the Staging Area will be replaced by the uploaded components. Any component that already exists for a student in the Staging Area that is not included in a subsequent upload will remain in the student’s record.

The characteristics used to determine a unique student record are as follows:

- Submitting Entity
- Unique Identification Code (UIC)
- School Facility Number

If an exact match exists, the new data will replace and/or append to the existing record. If one or more of the above characteristics are different, a new record will be created in the staging area. Below are examples of common scenarios for the “Append and Replace” process:
Bayside Public Schools (77010) has already uploaded a student with the following information:

- Submitting Entity: 77010
- UIC: 1231231234
- School Facility Number: 06336
- Components: School Demographics, Personal Demographics, Enrollment, Membership, General Ed FTE, English Learner

Scenario 1: Bayside Public Schools uploads a file for the same UIC with a different School Facility Number:

Two records will display for this student in the Data Staging Area. If any differences exist between the UIC, Last Name, First Name, Date of Birth, Gender or School Facility Number, an additional record will be created.

Scenario 2: Bayside Public Schools uploads a file for the same UIC with the same School Facility Number, but the English Learner Component is excluded:

One record will display for this student in the Data Staging Area. The student’s School Demographics, Personal Demographics, Enrollment, Membership and General Ed FTE components will all be replaced by the data that was uploaded in the file. The English Learner Component will remain in this student’s record in the Staging Area.

Scenario 3: In the current record, the student’s reported General Ed FTE is 0.5. Bayside Public Schools uploads a subsequent record for the same UIC with the same School Facility Number. The General Ed FTE Component and characteristic is reported with 0, the Special Education Component has been added and the Section 52 FTE characteristic is reported with 0.50.

One record will display for this student in the Data Staging Area. The School Demographics, Personal Demographics, Enrollment, Membership, and English Learner Components will be replaced with data submitted from the uploaded file. The Special Education Component will be added to the student’s record in the Staging Area. The General Ed FTE Component from the uploaded file will overwrite the previous data and display a General Ed FTE value of 0.

Notes:

- The append/replace process is automated upon file upload. Each submitting entity has its own data staging area for a particular collection. Therefore, if the same student is submitted by different districts (submitting entities) within the same collection, this same student’s record will appear in two different staging areas. Records uploaded or changed by one submitting entity would have no effect on the other submitting entity’s student data.
- The Teacher Student Data Link (TSDL) Collection uses different append/replace rules in order to determine a unique course. For more information, please refer to the TSDL Helpful Hints Guide.

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Data Staging Area

Once you have successfully uploaded a file, the next step is to review the field-level errors. You must correct student records that have errors and complete all UIC resolution before you can certify your collection. You should also review warnings to assure that the data are correct. The system generates warnings when the data are outside of the expected parameters for the characteristic, but may still be correct. Warnings will not prevent you from certifying a collection. To ensure consistencies between data in your local student information system (SIS) and the MSDS, errors can be corrected locally and the file re-uploaded. Corrections can also be made manually in the data staging area, after which the corrected data can be downloaded from MSDS and imported into your local student management system.

Once you have resolved all the student records within the collection and they are error-free, you should review the reports provided by MSDS to confirm that the data are accurate. Please review the “MSDS Reports” section of this manual for more information on the reports that are available in the MSDS. District superintendents may choose to have several different people review the data. For example, the special education director and the Title I coordinator might confirm that the data in the reports are correct for their respective programs and services.

The last step is to run the Quality Review process. If the data are error-free and correct to the best of the user’s knowledge, the collection may be certified. Certifying officially submits the data to the State on behalf of the district’s superintendent. While the data remain in the Staging Area, they are unavailable for editing or deletion. It is recommended that users run all reports and download the dataset prior to completing the certification process. A collection requiring certification is not recognized by the State until it has been certified; however, not all collections require certification. Once certified, a collection that only allows for a “single” certification will no longer accept files for upload. Collections with a certification type of “single” can be decertified at any time prior to the collection certification deadline.

Collection Certification may be one of three types:

- **Single Certification (General and Early Childhood Collections)** – there is a deadline for the collection, and the certification window will close as of a specified date. After certification, records remain in the staging area, but no further changes will be allowed.
- **Ongoing Certification (Student Record Maintenance and TSDL Collections)** – the collection is open throughout the school year, and certification can occur at any time. After certification, records remain in the staging area, but no further changes will be allowed to those certified records. Users can add/modify/certify additional records to the staging area.
- **Certification Not Applicable (Request for UIC and Early Roster Collections)** – the collection does not require certification.
Accessing the Data Staging Area

1. From the Student Data Submission menu, choose Data Staging Area.
2. Enter your district for the Submitting Entity. You may type the name or the code.
3. Choose the desired collection from the Collection dropdown. Optionally, you may choose a certification status, but this field is normally left blank.
4. Click the Filter button.

5. If the desired collection is listed, click on the collection name hyperlink to proceed to the staging area detail page. If not, you will get a message saying, “The search criteria that was entered returned no results.” Please refer to the “Add New Collection” section for instructions on how to manually create a new collection.

Your filtered results will have the following link options:

- **Collection**: This link will display if there is a staging area for that collection. Click this link to open the Staging Area Detail screen for that collection.
- **Upload**: This link will display while the collection is open. Click this link to upload data for this collection. (See Unit 3: Uploading Data for instructions.)
- **Download**: This link will display if there is data in the staging area. Click this link to download an XML file of the data in your staging area.
- **Delete**: Click this link to delete all data from the staging area for this collection. For single certification collections, this link will display if there is data in the staging area and the collection is open. For ongoing collections, this link will display if there are uncertified records in the staging area and the collection is open. For collections that do not require certification, this link will always display.
- **Certify**: This link allows users to run the quality review process and certify their data, and will display when the collection is open, certification is available, and at least one record in the staging area is not certified. This link does not display for collections that do not require certification.
- **Decertify**: This link allows users to decertify the collection and make further changes prior to the collection certification deadline. This link will only display for single certification collections.
- **Rerun Validation**: Clicking this link will rerun field-level validation and UIC resolution for this collection. Only use this option when directed by CEPI Customer Support.

Certification Status (which is displayed on the Staging Area screen) is changed only when a user clicks the Certify link on the Staging Area grid or the Quality Review button on the Staging Area Detail screen. Clearing up validation errors does not change the Certification Status until the Quality Review/Certify process is run again. Certification status messages can be found in Appendix B.

### Staging Area Detail

The Staging Area Detail screen allows users to correct errors on records and certify the collection, depending on user permissions. The Staging Area Detail screen displays for single certification collections (such as Fall General Collection) or collections where certification is not required (such as Early Roster). Errors are issued when the data are not acceptable, and must be corrected before a collection can be certified. Warnings are issued when information passes validation checks, but falls outside the expected norm. For example, a warning will generate if a student is reported with a birth date indicating s/he is 5 years old but in the 5th grade. The Certification Date column will display the date and time the records were certified. This column will be blank for any records that have not yet been certified. The table below lists possible field-level validation messages for a student record in a collection:

<table>
<thead>
<tr>
<th>Status Message</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Errors Exist</td>
<td>Field-level validation errors must be fixed before certification.</td>
</tr>
<tr>
<td>Error Free with Warnings</td>
<td>Field-level validation warnings should be reviewed to determine if changes are warranted.</td>
</tr>
<tr>
<td>Error Free with No Warnings</td>
<td>No field-level validation errors or warnings exist for the record</td>
</tr>
<tr>
<td>Pending Validation</td>
<td>The record has not gone through field-level validation.</td>
</tr>
<tr>
<td>Processing Validation</td>
<td>The record is currently being processed for field-level validation.</td>
</tr>
<tr>
<td>Processing Failed</td>
<td>Processing of the record failed. Please contact CEPI.</td>
</tr>
</tbody>
</table>

To review/fix record-level validation errors or to review/fix warning messages, click the hyperlink on the desired student’s last name. To resolve UICs, click on the **Requires Resolution** link. Information concerning each student will follow.
Notes:

- If student records are modified directly in MSDS, then those changes should also be made in your local student software system to ensure that your local system and the MSDS contain the same data for all your students.
- If student records in MSDS have been altered to a point that it would be easier to start over, go back to the Staging Area screen and click the Delete link to the right of the given collection name. In this case, the collection placeholder will remain, but all student records will be removed.
- Data can also be updated through another file upload. If student records are NOT removed from the Staging Area, a subsequent upload will only work correctly if the data uploaded are for the same district, school facility, collection, and the student’s UIC. If records are not removed from the Staging Area before another file for the same collection is uploaded, records will follow the Append/Replace guidelines, which in some cases could result in multiple records displaying for the same student in your Staging Area.

Rerun Resolution

Users can be working in multiple collection staging areas at any one time. If a record is resolved in one collection, it is not automatically resolved in another collection. Therefore, the system allows users to select records that they wish to rerun resolution on. For more information on UIC Resolution, please refer to the “UIC Resolution” section of this training manual.
1. Select the records that you wish to rerun resolution on by checking the box to the left of each record.
2. Click the **Rerun Resolution** button.
3. UIC Resolution will run on the selected records and the Resolution Status will update accordingly.

**Quality Review – Certify Collection**

After all field-level errors have been corrected, the collection can be certified through the *Quality Review* screen. Warnings do not have to be corrected if the data are accurate.

It is important to note that new errors could display during the Quality Review process. This is because the *Staging Area* is looking at **field**-level validation while the Quality Review process is looking at **collection**-level validation and performs checks that may cross collections and submitting entities.

To run the Quality Review process, do the following:

1. From the *Staging Area Detail* screen, click the **Quality Review** button. Or from the *Staging Area* screen, click on the **Certify** link.
2. Choose whether to proceed by clicking **OK** or **Cancel**.

3. Once the process completes, you can choose to download the dataset. This option is also available after certification. If no further changes are made to this collection prior to certification, it is a complete copy of your submission to the State. Remember that this file contains personally identifiable information and must be saved in a secure location.

4. Choose one of the following:
   a. If you have received certification-level errors, these must be addressed before certification can occur. You may choose to export the list of errors and warnings by clicking the Export button. Warnings should also be reviewed, as they could indicate a problem with your submission, however they will not prevent certification.
   
   b. If no certification-level errors are received and you are ready to certify the collection, check the confirmation box and click the **Certify** button.

   ![Certify Collection](image)

   **Note:** Certification is the FINAL STEP in the collection process. The State does not recognize data as submitted until the collection has been certified. When a user clicks the certify button, they are certifying data on behalf of the district’s lead administrator.

5. Click the **Approve** button to finish the certification process.

Once a collection has been certified, the **Staging Area Detail** screen is updated to **Certified Data Detail**. The certification date and time will display next to each record. The Delete Selected, Add Direct, Search/Add and Rerun Resolution buttons will be disabled.
Decertify Collection

Once certified, a “single certification” collection (General and Early Childhood Collections) can be decertified if the collection requires the input of more data, changes to data or the removal of inaccurate data. This decertification process will be available until the collection certification deadline.

1. To decertify a collection, **Filter** for the certified collection.
2. Click the **Decertify** link.

3. Press **OK** if you wish to decertify this collection and **Cancel** if you do not wish to continue.

Notes:

- Decertifying does not delete/remove records from the collection. It simply removes the status of the collection’s official submission to the State.
- Once decertified, the collection will again be open for file upload, manual addition or deletion of records, editing of records and certification.
- A collection that has been decertified must go through Quality Review and the certification process again for it to be considered officially submitted to the State.

Ongoing Certification (SRM/TSDL)

The **Ongoing Certification Detail** screen is a modified version of the Staging Area Detail screen and displays for ongoing collections only (Student Record Maintenance and Teacher Student Data Link).

Once records are certified, they will remain in the staging area. While users may continue to view the records that have been certified, these records may not be edited or deleted. Reports that are available on the **Ongoing Certification Detail** screen (Validation, UIC and Staging reports) will include records that have been certified and records that have not been certified.
The Quality Review and Certification processes are the same as single certification collections. Once records have been certified, they will be included in the Certified Reports. The Certification Date column will display the date and time the records were certified. This column will be blank for any records that have not yet been certified.

**Copy Selected to Staging**

If users need to resubmit students who were previously submitted in an ongoing collection, they may use the Copy Selected to Staging button. This button is only available for ongoing collections.

1. On the Ongoing Certification Detail screen, select the certified records that you wish to copy back into the staging area by checking the box to the left of each record.
2. Click on the Copy Selected to Staging button
3. Click on the Last Name link for each student and make all appropriate changes (such as the As of Date, program exit information, etc.).
Add New Collection

A collection can be added manually from the Staging Area screen. Only those collections the user has permissions for will be accessible in the Collection dropdown list. This feature is primarily for users who intend on manually entering data instead of uploading a file. For users that upload a file for a particular collection, that collection will be automatically created upon the first uploaded file.

1. From the data staging area, enter your Submitting Entity code. The Submitting Entity field should automatically pull up your school’s name. Click the name to finish populating the field.

2. Click the “Filter” button. If the desired collection is not listed, click the “Add New Collection” button. On the following screen, choose the collection you wish to create and then click the “Add Collection” button.
3. You will be taken to the Staging Area page for your entity. Click the collection name hyperlink on the left side to go to the Staging Area Detail screen, where you can add, delete or edit student data in that collection. For more information on the Add Direct and Search/Add features, please refer to the “Adding New Students” section of this manual.

![Staging Area](image)

**Downloading Your Data**

After a collection is certified, it is important to download a copy of your collection and save it for your records. These files contain confidential student data and must be stored in a secure location. The MSDS will only store the current and previous year’s collections in the system; all other collections are periodically archived and removed.

1. From the Data Staging Area, click the “Download” link next to the desired collection.

![Staging Area](image)

2. Downloads from the Staging Area are only available in XML format. The Data Location will populate appropriately based on whether the data are certified.
Click the **Start Download** button.

3. A “File Creation Started” pop-up box will appear. You will be prompted to go back to the Staging Area or to the Downloads page. Click “To Downloads.”

4. When the Status indicates “Ready for Download,” click the “File Name” hyperlink. You may need to refresh this screen to update the file status. This is usually done by pressing the F5 key on your keyboard. You can also get to the download status screen from the main navigation menu by clicking “Student Data Downloads” and “Download Status.”

5. When prompted, click the “Save” button. To save the file to your local computer.

All downloaded files are zipped. Double-clicking the file should open it in Windows Explorer just like a folder. Depending on your operating system and software, other methods may be better suited to your needs. Please remember that these files contain confidential student data, and must be stored in a secure location.
Adding New Students

The MSDS provides multiple ways of adding a student in the system.

- Student Search
- Staging Area Add Direct
- Staging Area Search/Add

Student Search

If your search for a student via the Student Search screen (see the “Student Search” section of this manual) did not yield any results, the following message will display.

Click the **Add This Student** button to add a student to the MSDS.

Please consider the following tips when manually adding a student to a collection through the Student Search function in the MSDS:

- Select “Request for UIC Collection” from the dropdown list as the “Collection.”
- Enter all required information. Characteristics that are marked with a red asterisk are required.
- While middle name is not a required field, it is vital information that can prevent the need for UIC Resolution.
• If the student(s) being entered were born as twins/triplets/etc., it is important to utilize the “Multiple Birth Order” field. Assign a number (“1” for the first-born, “2” for the second-born, etc.) to the student(s). This field can prevent the need for UIC Resolution, especially if the siblings share similar first names.

• Enter the Submitting Entity code or name (the system will guess the entity name as it is entered). For more information on entity codes, please search CEPI's Education Entity Master (EEM) application (http://www.michigan.gov/eem). If the code is valid, MSDS will display the institution’s full name.

• For the “Request for UIC Collection,” the “UIC” field can be left blank.

• Once the student’s information is submitted, you have the following options:
  o **Submit** – submits the student’s record to the Request for UIC staging area for the submitting entity that was entered on the “Add Student” form, and then takes the user back to Staging Area Detail.
  o **Submit/Add Another** – submits the student record to the Request for UIC staging area for the submitting entity that was entered on the "Add Student" form, and then takes the user back to Student Search.
  o **Submit/Go To Details** – submits the student record to the Request for UIC staging area for the submitting entity that was entered on the "Add Student" form, and then takes the user to the Request for UIC staging area for the submitting entity that was entered on the “Add Student” form.
  o **Cancel** – does not submit the student’s record and takes the user back to Student Search.

• Once the student’s record is submitted, the system goes through UIC Matching to determine the student’s UIC. You should go to the staging area to review the status of the student’s record. If the system finds potential matches to the submitted core information, UIC Resolution will be required. If the system finds no potential matches, the staging area will confirm that the student received a new UIC.

**Staging Area – Add Direct**

Student information can be manually entered in a staging area instead of uploaded in a file. This feature is best suited for situations where users are unsure if a UIC exists for the student.

1. From the Staging Area Detail page, click the **Add Direct** button.
2. Enter all required information. Characteristics that are marked with a red asterisk are required.
   o While middle name is not a required field, it is information that could prevent the need for UIC Resolution.
   o If the student(s) being entered were born as twins/triplets/etc., it is important to use the “Multiple Birth Order” field. Assign a number (“1” for the first-born, “2” for the second-born, etc.) to the student(s). This field helps prevent needing UIC Resolution, especially if the siblings share similar first names.

3. Once the information for the student has been entered, choose one of the following options:
a. Click the **Submit** button to display the *Staging Area Detail* screen.
b. Click the **Submit/Add Another** button to submit this student to the collection and add another student record.
c. Click the **Submit/Go To Details** button to fill in additional component and characteristic data for the student.
Staging Area – Search/Add

Student information can be manually entered in a staging area instead of uploaded in a file. This feature is best suited for situations where the student already exists in the MSDS (i.e. a UIC has been assigned).

1. Click on the **Search/Add button** from the Staging Area Detail screen.

2. The **Student Search** screen will load. Student records can be searched by UIC or by core fields such as name, gender and date of birth. Enter your criteria and then click Filter.
If the desired student has been located, click the **Select Student** button from the search results.

4. The **Add Student** screen is displayed with the information from **Student Search**. Choose one of the following options:
   a. Click the **Submit** button to display the **Staging Area Detail** screen.
   b. Click the **Submit/Add Another** button to submit this student to the collection and add another student record.
   c. Click the **Submit/Go To Details** button to fill in additional component and characteristic/field data for the student.
Additional Student Data

Once the record has been added to the Staging Area Detail screen, click the student’s last name hyperlink to enter any additional data for that student.

Enter any pertinent student information on all appropriate component tabs. The asterisks indicate what information is required for the chosen collection. However, additional data may be necessary when applicable to the student. Please verify that the student’s core information is correct and up to date. If additional components need to be added, select the desired component from the dropdown and then click Add Component.
Click the **Submit** button to save the student’s record. Any errors or warnings will appear below the student information. Correct all errors. Review warnings and make pertinent corrections, then click the **Submit** button again to refresh the data.

![Errors and Warnings Table]

**Errors:**

<table>
<thead>
<tr>
<th>Component</th>
<th>Characteristic</th>
<th>Error Description</th>
<th>Error Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Demographics</td>
<td>School or Facility</td>
<td>School Facility Number is required for all General collections, SRM, TSDL, and Early Roster except when Exit Status = 00 or when the EarlyOn component is submitted. (253.285.5)</td>
<td>The collection is the EarlyRoster and School or Facility is blank.</td>
</tr>
</tbody>
</table>

**Warnings:**
UIC Resolution

Each student is assigned a permanent, unique and secure number that moves with the student from grade to grade and school to school over the course of their academic career. This is the Unique Identification Code (UIC). UIC Resolution is the process of ensuring that each student is correctly associated with a particular UIC. To ensure quality data, the MSDS requires that every record have a valid UIC prior to certifying.

The MSDS application matches every submitted record against the Student Master Record in the UIC system. The fields used for matching include the First Name, Last Name, Date of Birth and Gender fields. The MSDS may also use the UIC and the middle name fields for matching if they are provided in the submitted record. The fields in the submitted record are compared against the corresponding fields in the Student Master Record to determine if it is the same student. Based on the fields used for matching, a score is calculated that determines how closely the submitted record matches a record(s) in the Student Master Record table. The calculated score determines if a record requires resolution. Records that require resolution necessitate user intervention to determine which UIC should be associated with a student’s record. If no match is found, the system automatically creates a new UIC.

When records require resolution, the user has the following options:

- **Use This Potential**: The user can choose a potential match if the submitted record (even if the details are different) refers to the same student.
- **Request New UIC**: The user can choose to request a new UIC if the submitted record genuinely refers to a new student.

From the *Staging Area Detail* screen, click the Requires Resolution hyperlink of the student under review in the Resolution Status column.
Review the student records presented as possible matches. All possible matches will appear to the right of the submitted record. This could be a single match or several.

Choose one of the following:

A. **One of the listed students is the same student.** Determine which UIC should be associated with the student and select Use this Potential. The UIC that is selected is now associated with the student’s record in the staging area.

The user will be prompted (if the user’s district is the PEPE or no PEPE is assigned) to update the Student Master Record. Selecting Yes updates the Student Master Record of the UIC selected in step 3 with the information from the submitted record. Selecting No does not update the Student Master Record but still associates the selected UIC with the student’s record in the staging area. The user will then be prompted if they would like to update the staging record with data from the Student Master Record.
Notes:

- If there is a PEPE assigned to the student and the submitting entity is not the PEPE, then the user will only be prompted to update the staging area with data from the Student Master record.
- If you choose a UIC that has a “score” below 50%, a warning message will appear. Please confirm this is the correct student.

B. **None of the listed students are the same student.** For records where none of the UICs presented are the correct UIC for the student, select Request New UIC. When a new UIC is requested, a justification is required. Please fill out the justification screen (shown below) and then click Submit. Please be as detailed as possible when submitting your request, explaining any work done previously to research this student.

![UIC Request Comments](image)

This request will be placed in a queue for the MSDS UIC Administrators review. The request will be approved or denied based on the information submitted in the request. You may review your request and the status of your request on the Manage Requests for UIC screen (instructions below).

### Manage Requests for UIC

When a request for a new UIC is submitted, it will display under the Manage Requests for UIC menu. If the request is approved by CEPI, a new UIC is created. The new UIC is assigned to the student’s record and can be viewed on this screen or in the staging area in the collection that the user requested the new UIC.

1. Choose **Manage Requests for UIC** from the **Manage Requests** menu.
2. Choose one or more of the criteria below to locate the desired student(s) and then click the **Filter** button.

![UIC Request Summary](image1)

3. Once your filter results have been returned, you may click on the **Details** button to review your request. This will bring up the UIC Resolution screen for that student.

4. Use the **Back** and **Next** buttons to move to the next request.

![UIC Request Summary](image2)

**Notes:**

- Once the System Administrator has approved or denied your request, the Details button is disabled.
- Requests will remain in a “New” status until the System Administrator has approved or denied your request.
- You will need to filter the list to review the status of your requests. Approved or denied requests remain in the list to allow users to track previous UIC requests.
- If the request is denied, please review the notes as to why this request was denied and, if necessary, resubmit the request and provide updated justification. If you have further questions, please contact CEPI customer support.
UIC Linking/Unlinking

The MSDS application allows the linking of students’ records when it has been discovered that a student has been assigned two UICs. Linking UICs will merge multiple records and the history associated with those records. When linking has occurred in error, users are able to request through CEPI to unlink UICs and the splitting of the records’ history.

Requesting to Link UICs

When users may find that the same student has been assigned more than one UIC, it is important that the user requests that those UICs be linked. Linking UICs allows the history of those student records to be tied together. Linking also allows students to be appropriately tracked over time. The ability to accurately track students over time is critical for many reasons; one example is for calculating graduation and dropout rates. Linking also reduces the burden on UIC Resolvers, as the system only matches against the primary UIC of a linked set of UICs.

Users can request to link UICs from the Student History screen. This screen is accessed from several screens, including the Student Details, FTE Conflict Detection and UIC Resolution screens.

1. From the Student History screen, select Request to Link from the Action dropdown list.
2. Click the Go button. The Student Link Request form allows users to request to link up to six UICs.
3. Enter each UIC you wish to link in the UIC column.
4. Choose the radio button for the primary UIC.
5. Add a reason for the linking request in the Justification text box.
6. Click the Validate All button to confirm that you are requesting to link valid UICs.
7. Click the Submit Request button.

Note for step 4: because the UIC system only matches against the primary UIC of a linked set of UICs, you must choose the student record with the most recent, accurate information as the primary UIC. This is important when name information has changed significantly, since the UIC system may not match correctly and instead create another new (duplicate) UIC. If you want a UIC to be primary, even if it does not have the most recent student information, you must first update the Student Master record details for this UIC before you attempt to link the UICs.

Linking requests are placed in a queue for the MSDS UIC lead to review. The request will be approved or denied based on the information submitted in the request. You may review your request and the status of your request on the Manage Linking Requests screen (instructions below).

**Manage Linking Requests**

1. Choose Manage Linking Request from the Manage Requests menu.
2. Choose one or more of the criteria below to locate the desired student(s) and then click the Filter button. Filtering allows you to view your linking requests that have been approved or denied.
3. Once your filter results have been returned, you may review your requests to see if they have been approved or denied by the System Administrator. Approved/denied status is shown in the bottom right hand corner of each request.

Resubmitting Denied Linking Requests

If your linking request was denied, the Resubmit button is activated. You may resubmit a denied request with additional information necessary for CEPI to approve your request.

1. Add additional information in the Request Justification text box.
2. Click on the Resubmit button.
3. Resubmitting will produce a success message near the top of the screen.

Requesting to Unlink UICs

Occasionally, UICs are linked and it is later determined that the UICs belong to two different students. If this situation occurs, users should request to unlink the UICs.
and split the history of those records. Splitting the history of two previously linked UICs assigns the appropriate history record to the correct UIC.

If you determine that UICs have been linked in error, please contact CEPI customer support. Provide your name, telephone number (including area code and extension), district code and district name (if applicable), along with the UICs and the reasons why you believe these UICs have been linked in error. CEPI will send an email once the UICs have been unlinked.
Primary Education Providing Entity (PEPE)

CEPI identifies the Primary Education Providing Entity for each public school student submitted in the MSDS. PEPE is used in assigning accountability for graduation cohort, student assessments, and accountability scorecard determinations.

Students who are submitted with nonpublic or homeschool residency codes are not assigned a PEPE.

Only an authorized user for a student’s PEPE district can update that student’s master record data (Personal Core characteristics). For students who do not have an assigned PEPE, any user may update the master record.

CEPI determines PEPE based on the Fall, Spring and End-of-Year (EOY) General collections and the SRM Collection in the MSDS. For the general collections, the process to update PEPE is run after the collection closes (not when the district certifies). For the SRM Collection, PEPE is updated upon the collection being certified.

Below are the rules used to determine how PEPE is assigned to each public school student:

- If a student is reported as continuing (exit status “19”) by only one entity for a given MSDS collection cycle, then that district and building becomes the PEPE.
- If a student is reported in multiple entities in a collection, the entity which reported the greater proportion of full-time equated (FTE) membership is the PEPE.
- If the student is reported with a graduating exit status (01, 02, 03, 04, 40, 41) or completer exit status (05, 06, 20, 21), this is considered a terminating exit status, and PEPE is assigned to the entity in which the terminating exit status was reported.
- If the exit status for a student equals any exit code other than those referenced above, PEPE remains with the last entity that reported the student as continuing.
- When both a Unique Education Provider (UEP) and a school report a student, the school will be the PEPE for the student. However, if only a UEP (e.g., Career and Technical Education entities and Michigan Math/Science Center buildings) reports a student, it will be the PEPE for the student.
- If a PEPE district and building cannot be determined, the record goes into “resolution” within the MSDS, and a System Administrator will determine PEPE. CEPI will utilize the previously accountable district/building’s code until a new PEPE can be assigned.
PEPE Reports

The following reports are available to assist district users in determining which students the district is PEPE for:

- Alpha Listing of Students with PEPE: This report is an alphabetical listing of students and associated primary education providing entity (PEPE) district and building. The report also specifies whether the PEPE building is a Unique Education Provider (UEP) and the collection the student was last reported. This report is used to verify that students are associated with the correct PEPE.

- PEPE Resolution Required: This report lists students for whom the MSDS could not determine a PEPE district or PEPE building. The state-level MSDS PEPE business lead will need to determine which entity should be assigned as the PEPE.

- Submitted Records without PEPE Assigned: This report lists students who have not been assigned a PEPE.

1. Choose PEPE from the navigational menu, then PEPE Reports.
2. Choose a report, format and collection from the drop-down lists.
3. Enter a district code or district name. The system will automatically display districts which match entered text. If more than one district name is displayed, select the appropriate district.
4. Click the View Report button.

Request PEPE Change

In rare cases, users may discover that the PEPE district or PEPE building for a student is incorrect. Users may request changes to a student's PEPE during the Graduation Rate Appeals Window (mid-July through mid-September). Please note the following:

- Due to improvements in PEPE district and building assignment, the PEPE Change Request feature is no longer available in the MSDS. In most cases, the PEPE district/building is already correct based on the rules described on the previous page.

- If you still feel that the PEPE district or building is incorrect, submit and certify a record for the student in the Student Record Maintenance (SRM) Collection with the appropriate exit status and exit date. Once the SRM
Collection is certified, the PEPE will be updated automatically. If the PEPE does not change as expected, please contact CEPI Customer Support.
Audit FTE

Student full-time equivalency (FTE) data are collected during the Fall and Spring General Collections as defined by the State School Aid Act. The FTE data submitted in those two collections must be audited and adjusted as necessary. The purpose of the audit is to ensure that the correct FTE is being claimed when school districts submit student records. The MSDS and audit processes produce a publicly available FTE report known as the unaudited DS4061 or the audited DS4120. This report displays the FTE counts grouped by various categories. During the audit process, these initial numbers are reviewed and confirmed by intermediate school district (ISD) auditors. Each school district is desk audited each year; buildings within the school district are audited once in either a two-year or four-year period.

This section of the manual describes functions for local district pupil accounting staff. A separate manual has been created for pupil accounting auditor functions.

FTE Conflict Detection

The FTE Conflict Detection feature operates on both staging and certified data and detects instances where a single student (UIC) is reported with more than 1.00 FTE. This feature will identify each student (UIC) where the total General Education and Special Education FTE exceeds 1.00 as reported by all districts. If the district wishes to make changes to the data they would be either routed to the appropriate student record in the staging area, or (if the collection has been certified) they must de-certify, update the records, and then re-certify the collection.

This page is refreshed every day via nightly processing. As more districts submit their data, more students may be listed as having an FTE conflict with another district. Therefore, users will want to review this form frequently for any new conflicts that have occurred due to another district submitting data.

FTE conflicts occur for two reasons:

1. Two different students are using the same UIC. This conflict can be resolved by changing the UIC for one of the students or requesting a new UIC.
2. A single student is submitted by multiple districts for a total of more than 1.0 FTE. This conflict can only be resolved by adjusting the submitted student record (prior to the collection closing), or via an audit adjustment (after the collection has closed).

UIC Conflicts (#1)

When the current general collection is open, a Request New UIC button is available on the FTE Conflict Detection screen. As with the normal Request for UIC process, the user must provide detailed justification as to why a new UIC is required and submit the request. Once the request is approved by CEPI, a new UIC will be generated and the conflict will be removed from the
screen. The new UIC will be changed on the submitted record and will be reflected in the staging and certified data reports.

Users will also need to request that the student history be split so that each student record is associated with the correct UIC. This is done by sending an email to CEPI Customer Support (cepi@michigan.gov) with “Student History Split Request” in the subject line. Please provide the incorrect UIC that was used and the new UIC that was created.

If the student in conflict that was submitted with the incorrect UIC already has an existing UIC, please do not request a new UIC for the student. The request will be denied. Please send an email to CEPI Customer Support at cepi@michigan.gov, with “Student History Split Request” in the subject line, and provide the two UICs that need the history records split.

Users will also need to update their local student information system with the new UIC. This step is critical to ensure that the same conflict does not reappear in a future collection.

**FTE greater than 1.0 (#2)**

The conflict resolution window is available from the count day for the associated general collection through the collection’s close date. Users may continue to decertify and resolve any FTE conflicts while the collection is still open. If you believe a student’s FTE is correct, work with the other district to reach a solution.

**After the collection closes**

It is important to note that there is not a penalty for unresolved FTE conflicts. If you have remaining conflicts after the collection closes, please take the following actions:

1. Discuss any remaining FTE conflicts with your ISD auditor.
2. Determine with your auditor if the conflict requires the issuance of a new UIC (Conflict #1 above). If so, use the Request for UIC collection to request a new UIC.
3. If the FTE conflict is the result of a single student (UIC) being reported with more than 1.00 FTE with another district, provide any necessary documentation to your auditor to verify enrollment. The auditor will work with both districts (and other auditors if necessary) to reach a solution.
Accessing the FTE Conflict Detection Screen

1. Choose **Audit FTE** from the navigational menu, then **FTE Conflict Detection**.
2. Choose a school year and collection from the dropdown list.
3. Enter a district code or district name. The system will automatically display districts which match entered text. If more than one district name is displayed, select the appropriate district.
4. Click the **Go** button.

When a district does not have any FTE Conflicts, the following screen will display:

Should you find FTE conflicts, the list will display each student reported by the selected district who was also reported for the same collection by another district(s), and for whom the total FTE reported by all districts exceeds 1.00. This is the definition of an FTE conflict. Clicking on the UIC link opens the Student History screen.

If the Adjust button is active on this screen, clicking the button will load the data staging area, where changes to the record can be made to resolve the conflict. The Adjust button is disabled after the district certifies the collection or after the collection close date. If you would like to resolve the conflict after the data have been certified, you will need to decertify the collection first. As a reminder, the conflict resolution window is available from count day through the general collection certification deadline. You may continue to decertify and resolve any FTE conflicts while the collection is still open.
For situations where two different students are using the same UIC (#1 above), click the Request New UIC button to resolve the conflict. This button is only available prior to the collection certification deadline. As with the normal Request for UIC process, the user must provide detailed justification as to why a new UIC is required and submit the request. Once the request is approved by CEPI, a new UIC will be generated and the conflict will be removed from the screen. The new UIC will be changed on the submitted record and will be reflected in the staging and certified data reports.

The Claim check box is used to notify auditors that the districts cannot resolve the conflict and the auditors must make the decision as to where the FTE will go. This should only be checked AFTER all attempts were made between the two districts to resolve the conflict. The Claim check box is available from the count day for the associated general collection through the collection certification deadline.

**Audit Form (DS4061/DS4120)**

The audit form displays district FTE counts for each applicable collection, grouped by various categories. During the audit process, the FTE counts submitted by districts are reviewed and confirmed by ISD auditors. The form is populated with data for the current general collection the day after the district certifies. All general collections dating back to Fall 1999 are available on this form.

1. Choose **Audit FTE** from the navigational menu, then **Audit Form**.
2. Choose a school year and collection from the first dropdown list.
3. Enter a district code or district name. The system will automatically display districts which match the entered text. If more than one district name is displayed, select the appropriate district.
4. Click the **Go** button.

The heading is displayed as DS4061 if the audit form has not been set to audited status by an ISD auditor. The heading will be displayed as DS4120 if the form has been set to audited status by an ISD auditor.
The audit form window displays district information in tabular form. The number of tabs varies by entity type: five for PSA districts, five for ISD districts and six for LEA districts. For collections prior to Fall 2016, two additional adult education tabs display for ISD and LEA districts. The bottom of the form displays the name of the user who last updated/audited the form.

The possible tabs are described in detail on the following pages.

**Special Ed tab**

This tab is available for ISD, LEA and PSA districts. However, Non-Resident Section 52 will always contain zeros for PSAs. Each individual row is totaled across and each column is totaled down. The data are grouped into the various Program Service Codes (110 through 270). Only the primary program code for a student is used in the calculation. The values in the Resident Sec52 and Non-Resident Sec52 columns depend on the values reported in Student Residency characteristic from the Membership component. Non-Resident codes are 01-07; Resident Codes are 08-15. The values in the Sec53a column are the sum of the Section 53 FTE characteristic from the Special Education component.

**General Ed tab**

This tab calculates General Ed FTE for each grade or setting and is available for LEA districts and PSA districts only.

The FTE w/o Graded Alt Ed column is populated for students in Grade/Setting 00-12 who **do not have** a Program Eligibility Participation code of 9220 (Alternative Education).

The FTE Graded Alt Ed Only column is populated for students in Grade/Setting 00-12 who **have** a Program Eligibility Participation code of 9220 (Alternative Education).
The “Alternative Education” row is only populated for collections prior to the Fall 2007 General Collection for students coded with a grade or setting of “13.”

The “Special Education Transition” row is only populated beginning with the Fall 2012 Collection for students coded with a grade or setting of “14.” While these students typically only receive special education transition services, General Ed FTE may be claimed if they are enrolled in courses counting toward a high school diploma.

**Additional Information tab**

The data displayed in this tab varies, depending on the entity type.

**LEA District:**

1. Non-public resident of district: students submitted with residency codes 08 or 15.
2. Non-resident pupils without release: students submitted with residency code 05.
3. Special Ed and General Ed FTE (Section 24): students submitted with residency code 09.

PSA District:

PSAs have two additional rows for the Fall General collection only:

1. This row is populated for students submitted with a Student Residency code of 10 [Student is counted by a new public school academy authorized by a local school district, and is also counted by the authorizing district during the immediately prior supplemental (Spring) FTE count.]

2. This row is a manually populated field where the auditor enters the new grade levels being offered.

ISD District:

1. Emotionally Impaired Students Served by the Department of Community Health: Total of Special Ed Section 52 FTE where the Student Residency code is 13.

2. Non-Special Ed Juvenile Detention Facilities and Child-Caring Facilities: Total of General Ed FTE where the Student Residency code is 12.
3. Special Education FTE (section 24): Total of Special Ed Section 52 FTE where the Student Residency code is 09.
4. Total Special Education students in ISD Programs: This is the total of Special Ed FTE from the Special Ed tab.

**Residency Information tab**

The data displayed in this tab vary depending on the entity type (LEA or ISD). This tab does not exist for PSA districts, as they cannot have non-resident students.

**LEA District:**

1. Non K-12 District: Students with Student Residency code 01.
2. Section 105/105c Schools of Choice: Students with Student Residency code 02 or 03.
3. Non-Public Non-Resident: Students with Student Residency code 04 or 07.
4. All Other: Students with Student Residency code 06.

**ISD District:**

1. Section 53 ISD Operated Program: Total of all Section 53 FTE.
2. Section 52 ISD Operated Program: Total of all Section 52 FTE where
   the Student Residency code is NOT 11 or 13.
3. School for the Deaf, Blind: All students with Student Residency code
   11.
4. Non-SpecEd Juv. Detention Facility or Child Caring Institute: All
   students with Student Residency code 12.
5. Emotionally Impaired Students Served by DCH: All students with
   Student Residency code 13.

**Adult Ed tab (prior to Fall 2016)**

For the Fall General Collection, the Adult Ed tabs reflect the July submission period
and the September submission period. For the Spring General Collection, the Adult
Ed tabs reflect the Adult Ed February and Adult Ed April submission periods.

The counts are based on various combinations of program code, age and diploma
status. Age is calculated as of September 1 of the school year.

Row 1: Adult Basic Education

Column c: Sum of Adult Ed FTE for Program 3311, Diploma Status “3”,
age < 20

Column f: Sum of Adult Ed FTE for Program 3311, Diploma Status “3”,
age > 19

Row 2: English as a Second Language:

Column a: Sum of Adult Ed FTE for Program 3312, Diploma Status “1”,
age < 20

Column b: Sum of Adult Ed FTE for Program 3312, Diploma Status “2”,
age < 20
<table>
<thead>
<tr>
<th>Column c: Sum of Adult Ed FTE for Program 3312, Diploma Status “3”, age &lt; 20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column d: Sum of Adult Ed FTE for Program 3312, Diploma Status “1”, age &gt; 19</td>
</tr>
<tr>
<td>Column e: Sum of Adult Ed FTE for Program 3312, Diploma Status “2”, age &gt; 19</td>
</tr>
<tr>
<td>Column f: Sum of Adult Ed FTE for Program 3312, Diploma Status “3”, age &gt; 19</td>
</tr>
<tr>
<td><strong>Row 3: General Education Development</strong></td>
</tr>
<tr>
<td>Column c: Sum of Adult Ed FTE for Program 3313, Diploma Status “3”, age &lt; 20 (beginning in Fall 2013)</td>
</tr>
<tr>
<td>Column f: Sum of Adult Ed FTE for Program 3313, Diploma Status “3”, age &gt; 19</td>
</tr>
<tr>
<td><strong>Row 4: High School Completion</strong></td>
</tr>
<tr>
<td>Column a: Sum of Adult Ed FTE for Program 3314, Diploma Status “1”, age &lt; 20</td>
</tr>
<tr>
<td>Column c: Sum of Adult Ed FTE for Program 3314, Diploma Status “3”, age &lt; 20 (beginning in Fall 2013)</td>
</tr>
<tr>
<td>Column d: Sum of Adult Ed FTE for Program 3314, Diploma Status “1”, age &gt; 19</td>
</tr>
<tr>
<td>Column f: Sum of Adult Ed FTE for Program 3314, Diploma Status “3”, age &gt; 19</td>
</tr>
<tr>
<td><strong>Row 5: Job referral-Remedial Reading/Math</strong></td>
</tr>
<tr>
<td>Column a: Sum of Adult Ed FTE for Program 3315, Diploma Status “1”, age &lt; 20</td>
</tr>
<tr>
<td>Column b: Sum of Adult Ed FTE for Program 3315, Diploma Status “2”, age &lt; 20</td>
</tr>
</tbody>
</table>
| **Row 6: Michigan Career and Technical Institute**  
*(prior to Fall 2013, Delton-Kellogg School District only)* |
| Column a: Sum of Adult Ed FTE for Program 3316, Diploma Status “1”, age < 20 |
| Column b: Sum of Adult Ed FTE for Program 3316, Diploma Status “2”, age < 20 |
Row 7: Permanently Expelled from School (prior to Fall 2013)

Column c: Sum of Adult Ed FTE for Program 3317, Diploma Status “3”, age < 20

**Summary tab**

All fields on this form are read-only and are calculated using fields that exist on the previous tabs.

LEA and PSA Display

<table>
<thead>
<tr>
<th>Special Ed</th>
<th>General Ed</th>
<th>Additional Information</th>
<th>Residency Information</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Special Education</td>
<td>16.38</td>
<td>Total Adjusted Special Education Count</td>
<td>16.38</td>
<td></td>
</tr>
<tr>
<td>K-12 Pupils</td>
<td>915.72</td>
<td>Total Adjusted K-12 Membership Count</td>
<td>915.72</td>
<td></td>
</tr>
<tr>
<td>Total Adjusted K-12 &amp; Special Education FTE</td>
<td>932.05</td>
<td>Section 25 Net Adjustments</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

**ISD Display**

<table>
<thead>
<tr>
<th>Special Ed</th>
<th>Additional Information</th>
<th>Residency Information</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Special Education</td>
<td>157.88</td>
<td>Total Adjusted Special Education Count</td>
<td>157.88</td>
</tr>
<tr>
<td>K-12 Pupils</td>
<td>0.00</td>
<td>Total Adjusted K-12 Membership Count</td>
<td>0.00</td>
</tr>
<tr>
<td>Total Adjusted K-12 &amp; Special Education FTE</td>
<td>197.88</td>
<td>Section 25 Net Adjustments</td>
<td>0.00</td>
</tr>
</tbody>
</table>
Printing the Audit Form

Click the Print button to print the Audit form. The report displays the Audit Form in PDF and each tab will print on a separate page.
MSDS Reports

The MSDS has a variety of reports that are generated from data already in the system and provide users with the opportunity to view and analyze the data.

The Data Staging Area contains reports for uncertified data or for collections that do not require certification. These reports reflect data from records that are error-free.

Reports based on certified data are available under the Certified Data Reports menu option. Additional reports are available that are not related to a collection, such as Direct Certification, FTE Audit, Grad Cohort and PEPE. Some reports are only available to users with appropriate permissions. For example, the Direct Certification Student Status report is only available to users with the Supplemental Nutrition role.

Reports are available in PDF, Excel and CSV formats. Some reports also have an additional drill-down format that can be used to access student-level detail.

For a full list of available reports, go to the MSDS Reports List spreadsheet. This spreadsheet contains two tabs. The “Report List” tab provides the location and the collection(s) that pertain to each report. The “Report Details” tab provides a brief description of each report, recommendations on how the report should be used and any additional comments.

Staging Area Reports

In the Data Staging Area, the reports are separated into three categories:

1. Validation Reports: these reports allow you to view a complete list of errors and warnings for the selected collection.
2. UIC Resolution Reports: these reports allow you to view students that have a UIC Resolution status.
3. Staging Reports: the list of reports varies based on the selected collection, and allow you to verify the data submitted in that collection. These reports should be compared with reports in your student information system to confirm the data are accurate.

Additional notes:

- Only uncertified, error-free records (with or without warnings) are included in the Staging Reports. Records that contain errors will not appear.
- Once the data are certified, staging area reports will no longer display data. The report must be run from the Certified Data Reports menu. Instructions can be found on the next page.
- For more information on how to access the Data Staging area, please refer to “Data Staging Area” section of this manual.
1. Select a report from the dropdown list.
2. Select a report format.
3. Click the **Run Report** button.

**Certified Reports**

1. From the Certified Data Reports menu, choose Certified Reports.
2. Type the name or code of the Submitting Entity.
3. Select the desired collection from the dropdown list.
   NOTE: Only collections with certified data will appear in this list.
4. Select the desired report from the dropdown list.
5. Select the desired report format from the dropdown list.
6. Click the **View Report** button.
Drill-down Reports

The following summary reports contain a drill-down option that allows users to view student-level detail:

- 12th Grade Graduate Summary
- Exit Status Count
- Gender/Race/Ethnicity Count
- Primary Disability Count
- Program Participation Count
- Residency Status Count

1. While selecting a report in either the Staging Area or the Certified Reports menu, choose the Drill-Down format and run the report as shown below.

2. The report will display as follows:
3. By default, the report will display the total district-level count. Click the + sign next to the district name to “drill down” to the building-level details.

<table>
<thead>
<tr>
<th>District</th>
<th>School</th>
<th>Exit Status (Codes 01-21, 30, 40-42)</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEPI Public Schools (00000)</td>
<td></td>
<td></td>
<td>2609</td>
</tr>
<tr>
<td>CEPI High School (00001)</td>
<td></td>
<td></td>
<td>395</td>
</tr>
<tr>
<td>CEPI Middle School (00002)</td>
<td></td>
<td></td>
<td>318</td>
</tr>
<tr>
<td>CEPI Elementary School (00003)</td>
<td></td>
<td></td>
<td>696</td>
</tr>
<tr>
<td>CEPI Adult Education (00004)</td>
<td></td>
<td></td>
<td>3</td>
</tr>
</tbody>
</table>

4. Next, click the + sign next to a building to “drill down” further to the next level in the report.

<table>
<thead>
<tr>
<th>District</th>
<th>School</th>
<th>Exit Status (Codes 01-21, 30, 40-42)</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEPI Public Schools (00000)</td>
<td></td>
<td></td>
<td>2609</td>
</tr>
<tr>
<td>CEPI High School (00001)</td>
<td></td>
<td></td>
<td>395</td>
</tr>
<tr>
<td>07 Dropped out of school</td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>08 Enrolled in another public school district in Michigan</td>
<td></td>
<td></td>
<td>34</td>
</tr>
<tr>
<td>09 Moved out of state</td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>19 Expected to continue in the same school district</td>
<td></td>
<td></td>
<td>355</td>
</tr>
<tr>
<td>CEPI Middle School (00002)</td>
<td></td>
<td></td>
<td>318</td>
</tr>
</tbody>
</table>

5. Continue clicking the + sign until you’ve reached the student-level detail.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Gender</th>
<th>DOB</th>
<th>UIC</th>
<th>Local Student ID</th>
<th>Grade</th>
<th>Exit Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>FALLON</td>
<td>JAMES</td>
<td>M</td>
<td>08/28/1991</td>
<td>0123456789</td>
<td>005744</td>
<td>12</td>
<td>2011-09-07</td>
</tr>
<tr>
<td>GARLOW</td>
<td>WESLEY</td>
<td>M</td>
<td>06/17/1994</td>
<td>1234567890</td>
<td>081366</td>
<td>12</td>
<td>2011-09-19</td>
</tr>
<tr>
<td>MONTANA</td>
<td>HANNAH</td>
<td>F</td>
<td>04/19/1996</td>
<td>2345678901</td>
<td>007456</td>
<td>10</td>
<td>2011-09-30</td>
</tr>
<tr>
<td>WITTEN</td>
<td>JASON</td>
<td>M</td>
<td>10/25/1993</td>
<td>3456789012</td>
<td>000805</td>
<td>12</td>
<td>2011-10-04</td>
</tr>
</tbody>
</table>

| 08 Enrolled in another public school district in Michigan |                                      |                                      | 34    |
| 09 Moved out of state |                                      |                                      | 2     |
| 19 Expected to continue in the same school district |                                      |                                      | 355   |
Printing the drill-down report

It is not possible to print drill-down reports directly from the MSDS. Using Microsoft Excel, please follow the steps below.

NOTE: The steps below are designed for Microsoft Excel 2010. For older versions of Excel, refer to the Microsoft Help resources or contact your local technical support for assistance.

1. Click the Export icon from the toolbar (circled in red) and choose Excel as shown below.

2. When prompted, choose Open or Save. If “Save” is chosen, select a location to save the file, and then locate and open the file.

NOTE: If “Open” is chosen, the file will automatically open in Excel, but in a read-only format by default. Click the “Enable Editing” button to make the spreadsheet editable.
3. In the upper left-hand corner, click the highest number shown (in this example, “5”) to completely expand all student-level detail.

4. Click on the File menu, and choose Print. Change the settings to “Landscape Orientation” and “Fit All Columns on One Page” as shown below.

5. Finally, click on the button.
# Appendix A: File Upload Status Descriptions

The following are possible file status options when viewing the Uploaded File Status screen:

<table>
<thead>
<tr>
<th>Status Message</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed Bulk UIC Resolution</td>
<td>The data in the Staging Area have been processed through bulk resolution.</td>
</tr>
<tr>
<td>Completed Detailed UIC Resolution</td>
<td>The data in the Staging Area have been processed through detailed resolution.</td>
</tr>
<tr>
<td>Completed Field Level Validation</td>
<td>The data in the Staging Area have been successfully validated.</td>
</tr>
<tr>
<td>Completed Load Data Collection</td>
<td>The XML file was successfully loaded to the Data Collection area.</td>
</tr>
<tr>
<td>Completed Load Staging Area</td>
<td>The data have been loaded to the Staging Area successfully.</td>
</tr>
<tr>
<td>Failed Bulk UIC Resolution</td>
<td>An unexpected error has occurred. Please contact CEPI customer support.</td>
</tr>
<tr>
<td>Failed Detailed UIC Resolution</td>
<td>An unexpected error has occurred. Please contact CEPI customer support.</td>
</tr>
<tr>
<td>Failed Field Level Validation</td>
<td>An unexpected error has occurred. Please contact CEPI customer support.</td>
</tr>
<tr>
<td>Failed File Level Validation</td>
<td>The file-level validation failed. The validation issues will be listed on the File Upload Details form.</td>
</tr>
<tr>
<td>Failed Load Data Collection</td>
<td>An unexpected error has occurred. Please contact CEPI customer support.</td>
</tr>
<tr>
<td>Failed Load Staging Area</td>
<td>An unexpected error has occurred. Please contact CEPI customer support.</td>
</tr>
<tr>
<td>Max Retry Exceeded – Removed from Queue</td>
<td>An unexpected error has occurred. Please contact CEPI customer support.</td>
</tr>
<tr>
<td>Passed File Level Validation</td>
<td>The file passed the file-level validation checks.</td>
</tr>
<tr>
<td>Problems Processing TXT file</td>
<td>MSDS does not accept files with the TXT extension. Please upload an appropriate file type.</td>
</tr>
<tr>
<td>Problems Processing ZIP file</td>
<td>The ZIP file uploaded was corrupt or contained invalid file types.</td>
</tr>
<tr>
<td>Processed Successfully</td>
<td>The data in the Staging Area have been processed successfully.</td>
</tr>
<tr>
<td>Status Message</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Processing Bulk UIC Resolution</td>
<td>The data in the Staging Area are being processed for Bulk UIC Resolution (100% match).</td>
</tr>
<tr>
<td>Processing Detailed UIC Resolution</td>
<td>The data in the Staging Area are being processed for UIC Resolution.</td>
</tr>
<tr>
<td>Processing Field Level Validation</td>
<td>The data in the Staging Area are being processed for field-level validation.</td>
</tr>
<tr>
<td>Processing File Level Validation</td>
<td>The file is being processed for schema issues, required UIC, duplicate students and other file-level validation issues.</td>
</tr>
<tr>
<td>Processing Load Data Collection</td>
<td>The XML file is being loaded to the Data Collection area.</td>
</tr>
<tr>
<td>Processing Load Staging Area</td>
<td>The data are being loaded from the Data Collection area and consolidated in the Staging Area.</td>
</tr>
<tr>
<td>Upload Failed</td>
<td>An unexpected error has occurred. Please contact CEPI customer support.</td>
</tr>
<tr>
<td>Uploaded Successfully</td>
<td>File was uploaded to the server.</td>
</tr>
<tr>
<td>Written to Queue – Available for Processing</td>
<td>The file was accepted and is waiting in the queue for processing.</td>
</tr>
</tbody>
</table>
# Appendix B: Certification Status Validation Messages

The following table represents possible **Certification Status** Validation Messages for a collection:

<table>
<thead>
<tr>
<th>Status Message</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certified</td>
<td>The staging area was certified and is closed for further changes.</td>
</tr>
<tr>
<td>Certification not Required</td>
<td>The collection is not available for Certification.</td>
</tr>
<tr>
<td>Certified – Ongoing</td>
<td>The staging area was certified and the collection allows for new enrollments, changes, exits and certification of updated data.</td>
</tr>
<tr>
<td>Errors Exist</td>
<td>The staging area was processed through Quality Review/Certification and errors were found.</td>
</tr>
<tr>
<td>Error Free with No Warnings</td>
<td>The staging area was processed through Quality Review/Certification and no errors or warnings were found.</td>
</tr>
<tr>
<td>Error Free with Warnings</td>
<td>The staging area was processed through Quality Review/Certification and warnings were found.</td>
</tr>
<tr>
<td>Failed Quality Review</td>
<td>The Quality Review process failed due to an unexpected issue. Please contact CEPI customer support.</td>
</tr>
<tr>
<td>Pending Certification</td>
<td>The staging area is available for certification.</td>
</tr>
<tr>
<td>Processing Certification</td>
<td>The staging area is currently undergoing the Certification process.</td>
</tr>
<tr>
<td>Processing Quality Review</td>
<td>The staging area is currently undergoing the Quality Review process.</td>
</tr>
<tr>
<td>Written to Queue – Available for Certification</td>
<td>The collection has been placed in a queue and will be processed for certification in the order received.</td>
</tr>
</tbody>
</table>

**Note:** The Certification Status is different from a Staging Area's Validation Status. Errors and warnings at the field level are displayed under the Validation Status heading on the *Staging Area Detail* screen. The Certification Status message is based on whether there are errors or warnings on the *Certify Collection* screen subsequent to clicking *Certify* on the *Staging Area* screen or clicking *Quality Review* on the *Staging Area Detail* screen.
# Appendix C: UIC Resolution Status Messages

The table below lists possible **field-level validation** messages for a student record in a collection:

<table>
<thead>
<tr>
<th>Status Message</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending Resolution</td>
<td>The record is ready for UIC Resolution.</td>
</tr>
<tr>
<td>Match Found</td>
<td>A match was found for the record in the Student Master.</td>
</tr>
<tr>
<td>Requires Resolution</td>
<td>Multiple choices for matching were found for this record and will require resolution.</td>
</tr>
<tr>
<td>Not Eligible for Resolution</td>
<td>The record requires resolution but the collection does not allow for it.</td>
</tr>
<tr>
<td>New UIC Generated</td>
<td>No matches were found for the record, and a new UIC was generated.</td>
</tr>
<tr>
<td>New UIC Requested</td>
<td>The record required resolution, and the resolver has requested a new UIC.</td>
</tr>
<tr>
<td>No Match</td>
<td>On the resolution screen, the user chose “No Match.” The possible matches presented were not the student.</td>
</tr>
<tr>
<td>Processing Resolution</td>
<td>The record is being processed for UIC resolution.</td>
</tr>
<tr>
<td>Used Previous Resolution Result</td>
<td>The record was previously resolved for this collection and submitting entity.</td>
</tr>
<tr>
<td>Requires New UIC Not Allowed for Collection</td>
<td>No matches were found for the record, and a new UIC was required, but the collection does not allow it.</td>
</tr>
<tr>
<td>UIC Request Denied</td>
<td>The request for a new UIC was rejected on the Manage Request for UIC form.</td>
</tr>
<tr>
<td>UIC Resolution Failed</td>
<td>The UIC Resolution process failed. Select the records that failed and click on “Rerun Resolution.” If the process fails again, please contact CEPI.</td>
</tr>
</tbody>
</table>