SRX – Student Records Exchange System

Institution Accounts - User Guide

Department of Education of Puerto Rico

April 2018
Version 1.2

Prepared By
Nagnoi, LLC.
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1 INTRODUCTION

The following document details the functionality of the Puerto Rico Student Record Exchange System (SRX).

After Hurricanes Irma and Maria, a significant number of primary and secondary students from Puerto Rico Department of Education temporarily relocated to the United States. Most of these students did not have available to them the appropriate student records to complete a typical enrollment process, putting a substantial load on school district’s admissions and student allocation processes.

Student Records Exchange (SRX) is a platform developed by the Puerto Rico Department of Education to facilitate the exchange of the student records with other districts to expedite their enrollment process at their schools.

The information available through the SRX allows school staff, such as guidance counselors and registrars, to make time-sensitive placement decisions more effectively. School staff can quickly access students’ previous enrollment records, course history to determine the appropriate placement within the new school.

Objectives of the SRX
- Provide support to displaced students from Hurricane Irma/Maria in Puerto Rico, that have transferred or in the process of doing so to schools in the US.
- Expeditiously provide the student transcript information that schools and US districts need to admit those students into their school system.
- Have an effective mechanism to track and monitor those PRDE students, including their return to Puerto Rico (with the additional academic information from the schools) to continue their academic studies and complete their graduation requirements.

When the students decide to return to Puerto Rico, the SRX will also enable the exchange student records and documents from US Districts and schools back to the Puerto Rico Department of Education with the additional academic information to continue their academic studies and eventually graduate.

The following table describes terms used throughout the document, as well as icons and buttons used in the application screens:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Menu”</td>
<td>List of available options and functions that appear when you login to the system.</td>
</tr>
<tr>
<td>“default”</td>
<td>Default selection that will always be used, unless another is explicitly specified.</td>
</tr>
<tr>
<td>SUBMIT</td>
<td>Validate input information and save data.</td>
</tr>
<tr>
<td>Name</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>CANCEL</strong></td>
<td>Cancel the operation and return to the previous page.</td>
</tr>
<tr>
<td>10</td>
<td>Shows number of records to show per page.</td>
</tr>
<tr>
<td><strong>Search:</strong></td>
<td>Use the data captured as a parameter for the corresponding search.</td>
</tr>
<tr>
<td>▼</td>
<td>Shows that there is a list of predefined values for this field.</td>
</tr>
<tr>
<td>📅</td>
<td>Calendar button. It shows a screen with a calendar to choose the desired date.</td>
</tr>
<tr>
<td>+</td>
<td>Clears the values of the fields to add a new request.</td>
</tr>
<tr>
<td>↑↓</td>
<td>Shows that the field be displayed in an orderly manner, either ascending or descending.</td>
</tr>
<tr>
<td>↑↓</td>
<td>Shows that the results are displayed in ascending order.</td>
</tr>
<tr>
<td>↑↓</td>
<td>Shows that the results are displayed in descending order.</td>
</tr>
<tr>
<td>NEXT</td>
<td>Advances to the next page within a results table.</td>
</tr>
<tr>
<td>PREVIOUS</td>
<td>Returns to the previous page within a results table.</td>
</tr>
<tr>
<td>SAVE</td>
<td>Save changes.</td>
</tr>
<tr>
<td>✍️</td>
<td>Allows modification of fields within the component where it is located. Example: Institution data.</td>
</tr>
<tr>
<td>📝</td>
<td>Downloads and opens the requested student record.</td>
</tr>
<tr>
<td>📩</td>
<td>Create an appeal for the transcript.</td>
</tr>
<tr>
<td>⌐</td>
<td>Delete the file selected.</td>
</tr>
<tr>
<td>📈</td>
<td>Create a return.</td>
</tr>
</tbody>
</table>
2 ACCESS TO SRX

2.1 Access to SRX

The Student Record Exchange System (SRX) can be accessed through the application portal of the Department of Education or through the following link:

https://srx.dde.pr/

When accessing the application, the home screen will show a brief explanation of the process functionality.

2.2 Login to SRX

By entering to the application, all users will see the following screen:
The "Email" and "Password" fields will serve to authenticate the SRX credentials. If you are already a registered user, enter these two fields and press "LOG IN". SRX will validate the input information and show the home page according to the user’s role. If the credentials are not valid, the system will show the following message.
The "Login" screen also has the option to remember the credentials for the next time you connect from the same computer. By check or uncheck the option, you can enable this functionality.

**Reset Password**

If you forget your password, you can use the option:

![Forgot password](image)

SRX will show the following screen to enter your email address. Then you will have to follow instructions to create a new password.
3 INSTITUTION ROLE - DESCRIPTION

Active institution accounts can enter new student record requests and verify the status of requests in the SRX. When a new request is entered and approved, the document will be available for download to the destination institution’s contact person.

3.1.1 Register New User

The first step will be the registration in SRX as user from an institution account. Once you enter the application, you must go to the "LOG IN" option and then to "REGISTER".

Figure 6- Locate Register Option
The system will show the register account screen, to enter the required fields for creating an account as an institution in SRX.

The "ALREADY HAVE ACCOUNT" option indicates that you already have a registered account; click on it, the system will take you to the "Login" screen.

Complete the registration form. You start the registration process by selecting type of account access, by the default; the value is “School / Participating Institution”.

Next, complete the fields related to the registration of your account:

- **Institution**: use the list of values indicator to search the name of the institution. The system will ask you to type five or more characters of the name of institution, and then it will show you the suggested ones. Select your institution from list.
- **First Name**: enter your name.
- **Last Name**: enter your last name.
- **Phone Number**: enter your phone number.
- **Email**: enter your institution email.
- **Password**: enter your password; be sure to remember it, you will need it to access SRX next time.
- **Confirm Password**: re-enter the password entered in the previous field.

Once all the fields are completed, press the REGISTER button.
The system will show the following message, indicating that the user will receive an email to validate the entered account registration information. Please check your email address inbox to complete the process.

If you try to enter the system without validating your account, the system will present the following message:

When you check your email, you will find a new message as shown below. The message will have the following information: "Please confirm your account by click on here". Click on the link "here".
The system will open a new window on your browser with a message indicating that your email account was validated.

![Validated Account](image)

**Figure 12- Validated Account**

Once your account is active, go to the home page to sign in. Enter the credentials. The home page as an Institution role is shown as follows:

![Home Page - Institution](image)

**Figure 13- Home Page - Institution**

The options available with this role are described below:
3.1.2 Entering New Request

Requests created in SRX are sent directly to the selected destination Institution. Once the request is approved the document will be made available to the destination institution contact for download. The user has three (3) options in the SRX portal to enter a new request.

1. Click on the New Request icon in home page

2. Through the menu bar, click on Request -> then click New Request
3. Once on the request list: click the + button

![Request Add New Request- Institution](Figure 17)

Any of these three options chosen, the SRX will open the page to create a new request.

**New Request Form**

The form contains two sections: Destination Institution Information and Student Information. As shown below:

![New Request – Destination Institution](Figure 18)

By default, SRX will show the destination institution information registered on the user account. If the user wants to make a request and send the transcript to a different institution, other than his own, please complete the following steps, and otherwise proceed to complete the Student Information Section

- **State Name**: use the list of values indicator to locate the name of the state. The system will ask you to type two or more characters and then it will show you the suggested ones

- **City Name**: use the list of values indicator to locate the name of the city. The system will ask you to type two or more characters and then it will show you the suggested ones.
- Institution Name: use the list of values indicator to locate the name of the institution. The system will ask you to type five or more characters and then it will show you the suggested ones.

Continue entering the student's information:

![Student Information](image)

- First Name: enter the student's first name.
- MI: enter the initial of the student's middle name.
- Last Name: enter the student's last name.
- SS (Last 4): enter the last four digits of the student's social security number.
- Date of Birth: enter the student's date of birth, choosing it through the calendar.

To choose the date, follow these steps:

1. Select year
2. Select month
3. Select day
4. Press Close

![Calendar](image)

e.g: To choose August 31, 2004, first select the year "2004", then choose month "August" and, the day "31". Finally, press Close.
• SIS PR Student ID: enter the student’s Puerto Rico Department Education id number (SIE number).

You can use button to find SIS PR Student ID, first and last name are required for the search, as well as the date of birth, following the order explained above (first year, then month and day).

If any of the required fields are missing, the following error message is show.

The following error message will show if the input data does not match or if a match is not found on our records (SRX).

• Request Type: use the list of values indicator to choose the type of request: IEP (Individualized Educational Plan) or Transcript.

• Reason: use the list of values indicator to locate the reason for the request. If you choose the reason "Other", the system will ask for description.

Once you have completed all the fields, press the "SUBMIT" button.

The system will indicate that your request was successfully saved:

Then, the system will redirect to the Request Status screen:
SRX will also send the user an e-mail confirming receipt of the request for the student and the destination institution.

As soon as the request is processed by the PRDE, you will receive another notification by email, indicating the student transcript is ready to be downloaded. The following image shows the message received by the institution when the request has been processed; it indicates that the document is available for download. If the user is logged in to the application, it can access the document directly from the email through the link; otherwise, it takes you to the log in page.
3.1.3 View Request Status

In this section, SRX shows results through tables for ease of access to the information. The columns are arranged alphabetically displaying 10 results per page (by default). Besides the name of each column, the icon shows whether the column is ordered ascending or descending. By click on the icon, the order reverses.

The user can change the number of records that can be viewed per page. The available values are 10, 25, 50 and 100.

![Figure 27- Results per Page](image)

The result table always shows the total of records and the number of records displayed per page. The buttons to move through the results pages will be displayed at the end of the table. The user can move to a specific page number by click on the desired number or click "Next" or "Previous" to move forward or backwards respectively.

![Figure 28 - Paging Bar](image)

Institutions may review the requests’ status, through the following options:

1. Click on the Request Status icon in the home page

![Figure 29- Request Status Icon](image)

2. Through the menu bar, click Request -> then click Request List

![Figure 30- Request List](image)
By selecting either of these two options, the system will redirect you to the following page to review the request status.

This option contains a results list with the following fields: Status, Student Identification, Student Name, Request Type, Request Date, Destination School, Document and Actions.

The status of the request can be Requested, Submitted, Approved, Resolved, Completed, Closed and Declined. The status varies by request type.

- Transcript/PEI: Requested, Approved, Declined
- Appeal: Requested, Resolved, Closed
- Return: Submitted, Completed

In the Document column, you can see the PDF icon to download transcripts that have been approved by PRDE or when the appeal have been closed.
Click on the PDF icon 📄, the system will open the document for review. The document can be printed or downloaded to your computer.

![Document PDF](image)

**Figure 32- Document PDF**

In the Action column, you can see the following icons:

- ![Icon](image) To create a review, available in case an appeal of the transcript is needed. For detail, see the appeal process.

- ![Icon](image) To view the details

- ![Icon](image) To create a return, available to submit student’s documents when the student return to Puerto Rico. For detail, see the return process.

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Finally, on this screen, the user has the option to change the number of records shown per page, as well as to search for a specific request.

![Requests Status](image)

**Figure 34- Records per page and Search**

### 3.1.4 Appeal Process

After reviewing the transcript, if the institution or the recipient understands that there is an error in the document, they can request a revision of it. The user has two (2) options in the SRX portal to request a review.

1. **Click on the review icon** in the request list, for the request that you want to review.

![Review Icon – Institution](image)

**Figure 36- Review Icon – Institution**
2. Through the menu bar, click on Request -> then click New Appeal

![Figure 37- Menu “New Appeal” – Institution](image)

Any of these two options chosen, the SRX will open the page to create a new appeal.

**New Appeal Form**

The form contains three sections: Destination Institution Information and Student Information and Documents.

As shown below:

![Figure 38- New Appeal – Destination Institution](image)

By default, SRX will show the destination institution information registered on the user account. If the user wants to make a request and send the reviewed transcript to a different institution, other than his own, please complete the following steps. Otherwise, proceed to complete the Student Information Section

- **State Name**: use the list of values indicator to locate the name of the state. The system will ask you to type two or more characters and then it will show you the suggested ones.

- **City Name**: use the list of values indicator to locate the name of the city. The system will ask you to type two or more characters and then it will show you the suggested ones.

- **Institution Name**: use the list of values indicator to locate the name of the institution. The system will ask you to type five or more characters and then it will show you the suggested ones.
Continue entering the student's information:

**Student Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIS PR Student ID</td>
<td></td>
</tr>
<tr>
<td>SS (Last 4)</td>
<td></td>
</tr>
<tr>
<td>Date of Birth</td>
<td></td>
</tr>
</tbody>
</table>

If the appeal is created from the original request, through the review icon, the student information will be displayed. Otherwise, complete the following:

- **First Name**: enter the student's first name.
- **MI**: enter the initial of the student's middle name.
- **Last Name**: enter the student's last name.
- **SIS PR Student ID**: enter the student’s Puerto Rico Department Education id number (SIE number). (This information can be found in the transcript)
- **SS (Last 4)**: enter the last four digits of the student's social security number.
- **Date of Birth**: enter the student's date of birth, choosing it through the calendar.

To choose the date, follow these steps:

1. Select year
2. Select month
3. Select day
4. Press Close

![Figure 40- Correct way to choose the date](image)

**e.g:** To choose August 31, 2004, first select the year "2004", then choose month "August" and, the day "31". Finally, press CLOSE.
Review Type: use the list of values indicator to choose the type of review needed: Demographic Data, Enrollment Data, Graduation Requirements, GPA, Credits, Wrong Grade, Missing.

Situation: describe the situation that requires review.

Continue with the Documents section: in this section, the user can add any document as evidence to the appeal process.

Click on the button to browse for the file, then click the button to attach the document to the request. The file will be displayed at the bottom.

Click to delete the file added.

Once you have completed all the fields, press the "SUBMIT" button.

The system will indicate that your request was successfully saved:

Then, the system will redirect to the Request Status screen:
SRX will also send the user an e-mail confirming receipt of the request for the student and the destination institution.

As soon as the request is processed by the PRDE, you will receive another notification by email, indicating the student transcript is ready to be downloaded. The following image shows the message received by the Institution when the request has been processed. It indicates that the document is available for download.

When the appeal have been closed, the institution can download the new transcript click on the PDF icon in the request status list.
SRX allows the institution to submit documents, like transcripts, when the student return to PR or wants to graduate with PR diploma. The user has three (3) options in the SRX portal to submit documents.

1. Click on the New Return icon in the home page
2. Click on the return icon in the request list, for the request that you want to return.

![Figure 49- Return Icon – Institution](image)

3. Through the menu bar, click on Request -> then click New Return

![Figure 50- Menu “New Return” – Institution](image)

Any of these three options chosen, the SRX will open the page to create a new return.

**New Return Form**

The form contains three sections: Destination Institution Information and Student Information and Documents.

As shown below:
By default, SRX will show the destination institution information registered on the user account and use the personal information as contact information. If the user wants to submit a return in favor of a different institution or use other contact information other than his own, can change it following these steps.

- **State Name**: use the list of values indicator to locate the name of the state. The system will ask you to type two or more characters and then it will show you the suggested ones.
- **City Name**: use the list of values indicator to locate the name of the city. The system will ask you to type two or more characters and then it will show you the suggested ones.
- **Institution Name**: use the list of values indicator to locate the name of the institution. The system will ask you to type five or more characters and then it will show you the suggested ones.

Then select,

If it is necessary, update the institution contact information: First Name, Last Name, Email, Phone Number.

Continue entering the student's information:
If the return is created from the original request, through the return icon, the student information will be displayed. Otherwise, complete the following:

- **First Name**: enter the student’s first name.
- **MI**: enter the initial of the student’s middle name.
- **Last Name**: enter the student’s last name.
- **SS (Last 4)**: enter the last four digits of the student’s social security number.
- **Date of Birth**: enter the student’s date of birth, choosing it through the calendar.

To choose the date, follow these steps:

1. Select year
2. Select month
3. Select day
4. Press Close

E.g: To choose August 31, 2004, first select the year "2004", then choose month "August" and, the day "31". Finally, press CLOSE.

- **SIS PR Student ID**: enter the student’s Puerto Rico Department Education id number (SIE number). (This information can be found in the transcript)
• You can use button ![search](https://example.com) to find SIS PR Student ID, first and last name are required for the search, as well as the date of birth, following the order explained above (first year, then month and day).

• Reason: use the list of values indicator ![listing](https://example.com) to choose the reason to submit a returning document. The values are Return to continue studies in PR, Request PR Diploma, and Pre-Evaluation.

• Current Grade Level: use the list of values indicator ![listing](https://example.com) to choose the student current grade

• Comments: to detail any relevant information.

Continue with the Documents section: in this section, the user must add the document with the return information.

![Documents](https://example.com)

Click on ![browse](https://example.com) button to browse for the file, then click the ![add](https://example.com) button to attach the document to the request. The file will be displayed at the bottom.

![Documents](https://example.com)

Click ![remove](https://example.com) to delete the file added.

Once you have completed all the fields, press the "SUBMIT" button.

The system will indicate that your request was successfully saved:
Then, the system will redirect to the Request Status screen:

SRX will also send the user an e-mail confirming receipt of the request for the student and the destination institution.

As soon as the return is processed by the PRDE, you will receive another notification by email, indicating the student record update is completed. The following image shows the message received by the Institution when the return has been completed.
3.1.6 Access Resources Catalog

The Resources catalog option is available for the institution role, so the user can review and download the content related to the SRX that the Department of Education has published, such as User Guides, Course Catalogue, Graduation requirements, etc.

3.1.7 Contact Us

If you have any questions about the SRX, visit our website https://srx.dde.pr/Home/ContactUs or contact us at info@de.gov.pr