

Ed-Fi Setup Checklist (Michigan)

Last Modified on 02/02/2026 3:22 pm CST

Tool Search: Ed-Fi

Use this checklist of Ed-Fi tasks to verify you have entered, selected and saved appropriate options for reporting data through Ed-Fi.

Done	Task	UI Location
	Enable Ed-Fi functionality via the Enable Ed-Fi system preference .	System Administration > Preferences > System Preferences > Enable Ed-Fi
	Enter the Connection Configuration .	System Administration > Ed-Fi > Ed-Fi Configuration
	Set tool rights for Ed-Fi	System Administration > User Security > Users/User Groups > Tool Rights
	Set the Ed-Fi Relation Type .	System Administration > Census > Relationship Type
	Add a Room to all Course Sections for state-reporting courses	Scheduling > Courses > Course > Sections > Sections
	Set Ed-Fi Grade Type .	Grading and Standards > Grading Tasks
	Align Grading Tasks mapped to the Ed-Fi Grade Type to Courses	Scheduling > Courses > Course > Grading Task
	Select Term Masks for aligned grading tasks	Scheduling > Courses > Course > Grading Task
	Set Grading Periods .	System Administration > Calendar > Calendar > Grading Periods
	Set the District Staff & District Assignment Code for all District Staff that need dashboard access (see the Dashboard Access section below).	Census > People > District Employment
	Set the Title, Type and Assignment Code fields for all school staff that need to report.	Census > People > District Assignments
	Add a Teacher Role on Staff History for teachers who need to report to Ed-Fi	Scheduling > Courses > Course > Section > Section Staff History

Done	Task	UI Location
	Assign Ed-Fi IDs .	Census > People > Demographics > Person Identifiers
	Set the Ed-Fi Graduation Plan Type and Cohort/Graduation Active Start Years on any graduation plans you want to report.	Program Admin > Programs > Graduation Programs > Ed-Fi Graduation Plan Type
	Set the Cohort/Graduation Active Start Year on any Career Tech Programs you want to report.	Program Admin > Programs > Career Tech Programs > Cohort/Graduation Active Start Years
	Resync Ed-Fi Data (see the Recommended Sync Order section for guidance on when to sync which resource)	System Administration > Ed-Fi > Ed-Fi Tools

Dashboard Access

The **District Assignment Code** field displays when the District Staff checkbox has been marked and gives users **District** wide access to the Ed-Fi Dashboards based on the Title that is selected for the staff. This field populates the **Education Organization Reference and Staff Classification Descriptor** in the [Staff Education Organization Assignment](#) resource. This field has its own sub-right and users **must** have any combination of RWAD tool rights to see and populate this field. School specific access will be issued based on District Assignment records if this field is left blank. Only populate this field for staff that should have access to all schools in dashboards.

District Employment District Assignments Overrides Option-Trans

Save **Delete** **New** **Documents**

Employment Records

... #280017 MILLARD PUBLIC SCHOOLS (08/02/2009 -)

Employment Information

*Start Date End Date
08/02/2009

Teaching Start Year Teaching Years Modifier
 0

License Number FTE Percent (whole number 0-100)
 0

District Staff **District Assignment Code**

Seniority Education

Salary Additional Compensation
\$ \$

District Assignment Code