

# Arizona Ed-Fi Setup Checklist

Last Modified on 12/14/2025 8:45 pm CST

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

For more information about setting up Special Ed Plans so that they properly report to Ed-Fi, see the [Setting Up Arizona SPED Plans for Use in Ed-Fi](#) article.

Task	UI Location
Enable Ed-Fi functionality via the <a href="#">Enable Ed-Fi system preference</a> .	System Administration > Preferences > System Preferences > Enable Ed-Fi
Set <a href="#">tool rights</a> for Ed-Fi.	System Administration > User Security > Users/User Groups > Tool Rights
Enter <a href="#">Connection Configuration</a> .	System Administration > Ed-Fi > Ed-Fi Configuration
Set all Resources to 'Off' and map the Ed-Fi Codes to Campus Codes via the <a href="#">Resource Preferences</a> .	System Administration > Ed-Fi > Ed-Fi Configuration > Resource Preferences
Set <a href="#">Days Per Week</a> value on all reportable calendars.	System Administration > Calendar > Calendar > Calendar
Set <a href="#">Calendar Dates</a> on all reportable calendars.	System Administration > Calendar > Calendar > Days
Set <a href="#">Term Descriptor Override</a> on Course Sections.	Scheduling > Courses > Course > Sections > Sections
Set the <a href="#">Ed-Fi Relation Type</a> .	System Administration > Census > Relationship Type
Set the <a href="#">Ed-Fi Transcript Term Override</a> for all manually added transcripts.	Student Information > General > Transcripts > New > Ed-Fi Transcript Term Override
Add a <a href="#">Room</a> to all Course Sections for state-reporting courses.	Scheduling > Courses > Course > Sections > Sections
Add an <a href="#">Instruction Setting</a> on Course Sections.	Scheduling > Courses > Course > Sections > Sections
Add a <a href="#">Level</a> to a Course, if applicable.	Scheduling > Courses > Course

Task	UI Location
Assign <a href="#">Ed-Fi IDs</a> .	Census > People > Demographics > Person Identifiers
Add a <a href="#">Teacher Role</a> on Staff History for teachers who need to report to Ed-Fi.	Scheduling > Courses > Course > Section > Section Staff History
Toggle Resources to 'On' in <a href="#">Resource Preferences</a> once all data setup is complete	System Administration > Ed-Fi > Ed-Fi Configuration > Resource Preferences