Kansas 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.

Task	UI Location
Enable Ed-Fi functionality via the Enable Ed-Fi system preference.	System Preferences > Enable Ed-Fi
Set tool rights for Ed-Fi.	User Groups > Tool Rights
Enter Connection Configuration.	Configuration
Set all Resources to 'Off' and map the Ed-Fi Codes to Campus Codes via the Resource Preferences.	Configuration > Resource Preferences
Set Calendar Dates on all reportable calendars.	Days Setup
Set Term Descriptor Override on Course Sections.	Section Information
Set the Ed-Fi Relation Type.	Relationship Type Setup
Set the Ed-Fi Transcript Term Override for all manually added transcripts.	Transcripts > New > Ed-Fi Transcript Term Override
Add a Room to all Course Sections for state-reporting courses.	Section Information > Room
Add an Instruction Setting on Course Sections.	Section Information > Instructional Setting
Add a Level to a Course, if applicable.	Course Information > State Defined > Course Level
Assign Ed-Fi IDs.	Demographics > Person Identifiers
Add a Teacher Role on Staff History for teachers who need to report to Ed-Fi.	Section Staff History
Toggle Resources to 'On' in Resource Preferences once all data setup is complete	Configuration > Resource Preferences