

# Kansas Ed-Fi Setup Checklist

Last Modified on 08/06/2025 4:05 pm CDT

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