Vermont 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
Assign Ed-Fi IDs to Students AND Staff.	Census > People > Demographics > Person Identifiers > Ed-Fi ID
Enable Ed-Fi functionality via the Enable Ed-Fi system preference.	System Settings > System Preferences > Enable Ed-Fi
Set tool rights for Ed-Fi.	User Management > User Accounts > Tool Rights
Enter Connection Configuration.	Reporting > Ed-Fi > Configuration > Connection
Set all Resources to 'Off' and map the Ed-Fi Codes to Campus Codes via the Resource Preferences.	Reporting > Ed-Fi > Configuration > Resource Preferences
Set Calendar Dates on all reportable calendars.	Scheduling & Courses > Calendar Setup > Day Setup
Add a Course Setting on Courses.	Scheduling & Courses > Courses > Course Information
Add a Level to a Course, if applicable.	Scheduling & Courses > Courses > Course Information
Add a Teacher Role on Staff History for teachers who need to report to Ed-Fi.	Scheduling & Courses > Courses > Section Staff History
Toggle Resources to 'On' in Resource Preferences once all data setup is complete	Reporting > Ed-Fi > Configuration > Resource Preferences