

Wisconsin General Ed-Fi Setup Checklist

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[General Ed-Fi Checklist](#) | [Ed-Fi Roster Checklist](#)

Classic View: System Administration > Ed-Fi

Search Terms: Ed-Fi

General Ed-Fi Checklist

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 Connection Configuration, and ensure a Profile value is selected.	System Administration > Ed-Fi > Ed-Fi Configuration > Connection
	Set tool rights for Ed-Fi.	System Administration > User Security > Users/User Groups > Tool Rights
	Set all Resources to 'Off' and map the Ed-Fi Codes to Campus Codes via the Resource Preferences . For the 2020-21 school year, do not configure the Course Transcripts resource until a notification has been sent to configure it.	System Administration > Ed-Fi > Ed-Fi Configuration > Connection Config
	Assign Ed-Fi IDs .	Census > People > Demographics > Person Identifiers
	Enter District Agency Key for reporting Ed-Fi District Numbers.	System Administration > Resources > District Information
	Enter School Agency Key for reporting Ed-Fi School Numbers on the School Editor.	System Administration > Resources > School Information

Done	Task	UI Location
	Toggle Resources to 'On' in Resource Preferences once all data setup is complete. <div style="border: 1px solid #ccc; background-color: #fff9c4; padding: 5px; margin: 5px 0;"> For the 2020-21 school year, do not turn on the Course Transcripts resource until a notification has been sent to turn it on. </div>	System Administration > Ed-Fi > Ed-Fi Configuration > Connection Config
	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

Recommended Sync Order

Ed-Fi v3.1 & v3.3

#	Category	Resources
1	Grade Information	Grading Periods
	Schedule Information	Sessions
2	Schedule Information	Course Offerings
		Sections
	Student Information	Students
		Graduation Plans
		Student School Associations
		Student Special Education Program Associations
		Student Education Organization Association
		Student Program Associations
		Student Homeless Program Associations
		Student CTE Program Associations
		Student Language Instruction Program Association
Student School Food Service Association		
3	Parent Information	Parents
		Student Parent Associations
	Schedule Information	Staff Section Associations

#	Category	Resources
		Student Section Associations
4	Grade Information	Course Transcripts
		Student Academic Record
	Discipline Information	Discipline Incident
		Student Discipline Incident Association
	Discipline Action	
5	Grade Information	Grades

Ed-Fi v2.0

#	Category	Resources
1	Grade Information	Grading Periods
	Schedule Information	Class Periods
		Locations
		Sessions
2	Schedule Information	Course Offerings
		Sections
	Staff Information	Staffs
	Student Information	Students
		Student School Associations
		Student Special Education Program Associations
		Student School Association WI Ext
		Student Program Associations
		Student Homeless Program Associations
		Student CTE Program Associations
3	Schedule Information	Staff Section Associations
		Student Section Associations
4	Grade Information	Student Academic Record
	Discipline Information	Discipline Incident
		Student Discipline Incident Association

#	Category	Resources
		Discipline Action
5	Grade Information	Grades

Ed-Fi Roster Checklist

If your school or district uses a course catalog, changes or corrections may need to be made to the Course Master to push to individual courses.

Please note that NCES data is not turned on to push from Course Master by default. This can be set to push by checking the NCES Data box under Grading & Standards > Course Catalogs for each relevant Course Catalog.

Step 1 - Verify State Course Codes

It is highly recommended to verify that Courses expected to report to Ed-Fi have the correct State Code. Create an Ad hoc filter with fields similar to the example below to compare to the master course list, using the Data Type of Course/Section.

Ad hoc Field	Ad hoc Path
courseInfo.courseID	Course > Course Information > courseID
courseInfo.courseNumber	Course > Course Information > courseNumber
courseInfo.courseName	Course > Course Information > courseName
courseInfo.stateCode	Course > Course Information > stateCode
courseInfo.NCES Code	Course > Course Information > NCES Code
courseInfo.SCED Subject Area	Course > Course Information > SCED Subject Area
courseInfo.SCED Course Identifier	Course > Course Information > SCED Course Identifier
courseInfo.SCED Course Level	Course > Course Information > SCED Course Level

Add other identifying fields to the Ad hoc report as needed.

Step 2 - Set SCED Sequence as Necessary

SCED Sequence is used as a part of Ed-Fi. This data IS SENT to Ed-Fi in the Sections Resource as the element sequenceOfCourse. The intended purpose of this field is to identify different parts of a multi-part course that would otherwise have the same course number. By default, it is set to 1 of 1.

Step 3 - Verify/Update Course Programs for Bilingual/ ESL

The Bilingual/ESL programs were expanded and renamed. The old Bilingual codes were made inactive, but were mapped to the closest valid Ed-Fi code. A course with an old value appears in gray with ** after the value. These codes can be kept as is IF the Ed-Fi Code that is being sent is the correct value.

Bilingual/ESL Codes

Code	Program Type	Program Name
LIEP-Bilingual	Language Instruction Education Program - Bilingual Program	Dual Language Immersion
LIEP-Bilingual	Language Instruction Education Program - Bilingual Program	Developmental or Late - Transitional Bilingual Program
LIEP-Bilingual	Language Instruction Education Program - Bilingual Program	Heritage language program or Indigenous language program
LIEP-Bilingual	Language Instruction Education Program - Bilingual Program	Transitional Bilingual Education
LIEP-ESL	Language Instruction Education Program - ESL Program	ESL - Integrated or Co-teaching models
LIEP-ESL	Language Instruction Education Program - ESL Program	No ESL program available
LIEP-ESL	Language Instruction Education Program - ESL Program	ESL - Sheltered Instruction
LIEP-ESL/Bilingual	Language Instruction Education Program - ESL/Bilingual	Content-Based ESL-Bilingual
LIEP-ESL/Bilingual	Language Instruction Education Program - ESL/Bilingual	Newcomer-Bilingual
LIEP-ESL/Bilingual	Language Instruction Education Program - ESL/Bilingual	Integrated EL-Special Education
LIEP-ESL/Bilingual	Language Instruction Education Program - ESL/Bilingual	Newcomer-ESL

Step 4 - Set Course/Section for Medium of Instruction

Medium of Instruction is a ***NEW*** field on both Course/Course Master and Section. It collects the media through which teachers provide instruction to students and students and teachers communicate about instructional matter. The value filled in on the Course level applies to all sections unless there is a different value entered on a section. Then the Section level field acts as an override for that section.

Course Sections Grading Tasks Standards

Save Delete

Course Information

NCES Data

Description

Custom Data Elements

Academic Service Learning

School-Sponsored Activity

Alternative Education Program

Bilingual/ESL

E: ESL**

Classroom Type

Dual Enrollment

Equivalency

World Language

Project Based

Medium of Instruction

- 1: Center-based instruction
- 2: Correspondence instruction
- 3: Distance Learning (other than online)
- 4: Face-to-face instruction
- 5: Independent study
- 6: Internship
- 7: Other
- 8: Other technology-based instruction
- 9: Technology-based instruction in classroom
- 10: Telepresence/video conference
- 11: Televised
- 12: Videotaped/prerecorded video
- 13: Virtual/On-line Distance learning

Medium of Instruction Course Field

This field REPLACES the Distance Ed and Virtual Online Ed check boxes. These checkboxes were removed, but data was retained and can be viewed using Ad hoc Reporting. Data shows as a value of 1 if the box was checked.

The Ad hoc fields and paths are:

Ad hoc Field	Ad hoc Path
customCourse.distanceEd	Course > Course Information > Custom Course > distanceEd
customCourse.virtualOnlineEd	Course > Course Information > Custom Course > virtualOnlineEd

There was no clear 1-to-1 conversion for the old check boxes to the new values therefore **NO conversion or mapping was done.**

Please note that DPI will assume if Medium of Instruction is left blank that it is the same as Face-to-face Instruction; however, it is recommended to set an actual value for this field to match the Infinite Campus value with the Ed-Fi value.

Step 5 - Verify Teacher Role Codes

All values for **Teacher Role** were changed as a part of Ed-Fi. No conversion was done, however the old codes were mapped to Ed-Fi codes to allow data to transmit.

Teacher Role Codes

Code	Name	Ed-Fi Code	Ed-Fi Name
01	Paraprofessionals/teacher aides	00059	
02	Non-instructional staff	00069	
03	Student teachers	00080	
04	Intern	01234	
05	Volunteer/no contract	01382	
06	Administrative staff	03187	
07	Counselor	04725	
08	Resource teacher	04735	
09	Primary instructor	05971	
10	Secondary instructor	05972	
11	Instructor of record	05973	
12	Other	09999	
13	Co-teacher	73071	
14	Lead Team Teacher	73072	
15	Course Proctor	73073	
16	Special Education Consultant	73074	
XX	Not State Reported		

Section **Staff History** Roster Attendance Grading By Task

Save Delete New Primary Teacher New Teacher

Staff History

Name	Assignment Start	Assignment End	Access Start	Access End
Primary Teacher				
Staff, Maria N				

Assignment Start and End date fields should remain blank unless staff members start working in first scheduled term, or stop working in the section before the last day of the last scheduled term.

Access to this section is controlled by Access Start and End dates. To end a user's access to this section, set the Access End Date.

Staff History Detail

Primary Teacher

Name: Staff, Maria

District Assignment: [Dropdown]

Role: ME: Monitoring Educator**

Assignment

Start Date: [Calendar] End Date: [Calendar]

Access to Section Dates

Unrestricted Start Date: [Text] End Date: [Text]

Date Range Start Date: [Text] End Date: [Text]

Comments

- Modified by: Staff, Mark 06/02/2016 08:31
- Created by: Staff, Mark 06/02/2016 08:31

Teacher Display Name on Section

Making a change to the Teacher Display Name here will update the value on the Section tab.

Continue using the current Teacher Display Name from the Section tab: **Staff, Maria N**

Use a new Teacher Display Name on the Section tab: Staff, Maria

Staff History Role Selection

This Teacher will send with a Role Code of 09999 Other.

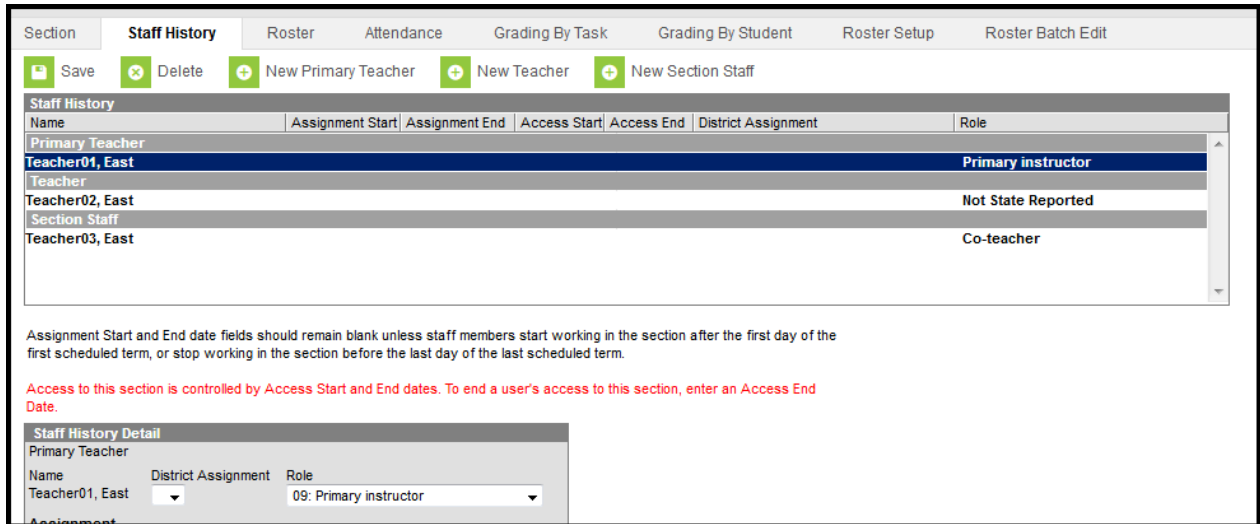
If this is correct for this course, no changes need to be made. If another role code more closely matches this teacher's position for this course, a different Role Code should be selected to report the accurate value.

People added in the Section Staff History tab as a Primary Teacher or Teacher will send to Ed-Fi if they have a valid Role Code. Section Staff will NOT send to Ed-Fi.

In addition, a new value for District purposes called *Not State Reported* is available. A Primary

Teacher or Teacher with this Role Code will NOT report to Ed-Fi. In the image below, the following occurs:

- Teacher01 reports as the Primary Instructor.
- Teacher02 does not report because their role is Not State Reported.
- Teacher03 does not report because they are a Section Staff, not a Teacher.



Staff History Tab - Primary Teacher, Teacher, Section Staff

Step 6 - Map Ed-Fi Resource Preferences

The Ed-Fi Configuration tool is used to establish Ed-Fi data resources.

Please review the [Set Resource Preferences article](#) for information on mapping Ed-Fi fields.

Step 7 - Map Final Grades to Ed-Fi Grade Type

Districts need to map anything considered a final grade to an Ed-Fi Grade Type.

Index Search < **Score Groups & Rubrics**

Save Delete New Score Group New Rubric

Search Campus Tools

- Grading & Standards
 - Course Masters
 - Push All Course Masters
 - Push All Courses
 - Auto Grade
 - Grading Window
 - Course Catalogs
 - Course Group
 - Credit Groups
 - Grading Tasks
 - Score Groups & Rubrics**
 - Standards Bank
 - Reports
 - Medicaid
 - Program Admin
 - Ad Hoc Reporting
 - Transcripts
 - User Communication
 - Assessment

Score Groups & Rubrics Editor

Name	Type
Calificación con letras + P	Score Group
En Via a Satisfacer Estándares	Rubric
Academic & Life Long Learning	Rubric
Calificación IB del semestre	Rubric
College Credit	Score Group
Criterios de calificación IB	Rubric
CWCS	Rubric
Desarrollo	Rubric
Desarrollo entre Trimestres	Rubric
Desarrollo- Calific. de sec.	Rubric
GED Competency	Rubric
Growth	Rubric
Growth Between Trimesters	Rubric
Growth-Grade Level Expectation	Rubric

Rubric Detail

Name Show Power Law Fields

Academic & Life Long Learning

Rubric List Items Detail

Sequence Name	Score	Ed-Fi Grade Type	Passing Score	Credit Coeff.	Minimum Value	Rollup Value	Mean Value	GPA Value	GPA Unweighted Value	GPA Bonus Points
X 1 Exceeds Expectations	4	P: Pass	<input checked="" type="checkbox"/>	0	0	0	0			0
X 2 Meets Expectations	3	P: Pass	<input checked="" type="checkbox"/>	0	0	0	0			0
X 3 Partially Meets Expectation	2	P: Pass	<input checked="" type="checkbox"/>	0	0	0	0			0
X 4 Does Not Meet Expectation	1	P: Pass	<input type="checkbox"/>	0	0	0	0			0
X 5 Adaptation/Differentiation	X	P: Pass	<input checked="" type="checkbox"/>	0	0	0	0			0
X 6 Not Assessed This Term	NA	NA: Not Applicable	<input type="checkbox"/>	0	0	0	0			0

Final Grades - Ed-Fi Grade Type

Step 8 - Turn on Resource Preferences

Turn on the appropriate Resource Preferences. Please review the [Set Resource Preferences article](#) for information on turning on Resource Preferences.

Once Resource Preferences have been mapped, a valid configuration is made and Ed-Fi ID's are assigned to users, data will flow properly from Campus to Ed-Fi.

Step 9 - Perform a Resync

Perform a Resync. It is recommended to let the resync finish processing before starting another resync. See the [Resync article](#) for more information on this process.

A valid connection must exist in order to resync data for that year.

Districts with a large number of schools or students may want to run the resync for course information for a few schools at a time and/or perform the resync during off hours.

Index
Search
Error Log
Event Queue
Resync
Delete Tool

Search Campus Tools

- ▼ Ed-Fi
 - Ed-Fi Config
 - Ed-Fi Tools
 - Ed-Fi Reconciliation
 - ▶ Ed-Fi Reports
 - ▶ Enrollment
 - ▶ Finance
 - ▶ Grading & Standards
 - ▶ Health
 - ▶ Lockers
 - ▶ Medicaid
 - ▶ Messenger
 - ▶ PLP
 - ▶ Portal
 - ▶ Preferences
 - ▶ Resources
 - ▶ Response to Intervention

⚙️ Start Resync

Select a Scope Year and Schools to resync data. If a resync is needed for specific people, enter the Campus Person ID's of the records to resync. When more than one person's records should be resynced, separate the ID's with a line break, comma or space. If running for specific people, non-person-related resources and attendance will not resync.
Warning For best performance, run one school at a time as running the Resync Tool sends large amounts of data.

School Year 2018-2019

School(s) Choose School(s) All Schools

Campus Person ID(s) All People

Select Dependencies

- ▶ Attendance Information
- ▶ Discipline Information
- ▶ Grade Information
- ▶ Schedule Information
- ▶ Staff Information
- ▶ Student Information

Ed-Fi Resync