Ed-ID Inter-Agency Implementation: Roadmap Guidance

The purpose of this document is to provide high-level guidance on the steps required for another state agency to implement Ed-ID via the Identities API or the Ed-ID Portal. This guidance should be useful for the agency's designated project manager as they create a roadmap, business case, or project plan.

	Milestone/Question	Path/Option	Resource/Next Step
	ONBOARDING		
1	Have you reviewed IDOE process maps and documentation?	No	Review the Ed-ID documentation posted online at https://www.in.gov/doe/it/state-ed-id-portal
		Yes	Proceed to next question.
2	Do you need more information from IDOE?	Yes	Schedule informational call with IDOE CIO or Director of Strategic Projects.
		No	Proceed to next question.
	CREATING YOUR ROADMAP		
3	Can you articulate a compelling use case for Ed-ID at your agency?	No	Meet with agency leadership to review business need and solutions. IDOE can advise on use cases from prior implementations. Utilizing a common Ed-ID is expected to be critical foundation of future data sharing agreements within the P-20W+ system.
		Yes	Document and proceed to next question.
4	Are key users identified?	No	Conduct additional internal discovery to consider who might need access to Ed-ID. • Who works directly with the public and is likely to interact with case records and data? • Who administers existing systems? • Who works with local agencies that may work with the state to implement your programs?
		Yes	Document who and proceed to next question.
5	Are the key business processes that will incorporate the Ed-ID known?	No	Conduct additional internal discovery to consider: • When is a new record created? • When are records updated? • What reporting or program analysis needs might make use of a unique identifier? • Does your agency have a data governance working group or other formal structure for considering strategy around data needs? • Are there identified data analysts, policy staff, programmers, and other staff that might be tapped to consult on data governance?
		Yes	Document how and proceed to next question.

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6	Are the IT systems impacted known?	No	Conduct additional internal discovery to consider: • What are the key applications that support users and business processes? • What are the means by which users access these applications? • What data elements, forms, and user interfaces will need to be updated to reflect required Ed-ID data elements?
		Yes	Document how and proceed to next question.
7	Will you need to work with an agency vendor?	No	Proceed to next question.
		Yes	Note vendor, key data stewards, and key contact information and then proceed to next question.
8	Can you speak to the priority at your agency/vendor and provide a rough implementation timeline?	No	Conduct internal discovery to consider: • What are management's expectations around this project? • How does this project align with the strategic plan, executive or legislative priorities, or federal grant mandates?
		Yes	Document when and proceed to next question.
9	Can your vendor provide project management and developer resources to allow your systems to interface with the API?	No	Seek contract amendment or new contract for additional resources.
		Yes or N/A	Proceed to next question.
10	Are there any limitations around sharing data with IDOE?	No	Proceed to next question.
		Yes/Uncertain	Work with legal counsel and your agency's privacy officer to review applicable regulations and note considerations. These limitations typically can be acknowledged via a data-sharing agreement (MOU) with IDOE which could address: • Consent/disclosure to public. • Which types of data can be shared to locate or generate the Ed-ID.
11	Does your roadmap need to be reviewed by any others?	No	Proceed to next question.
		Yes	Seek review (common reviews may include legal, IT, Data, Field Operations, etc.) and proceed to next question.
	PROJECT KICKOFF AND PARTNERSHIP AGREEMENT		
12	When your department is ready to kick off the project, provide a draft of your roadmap to IDOE's Director of Strategic Projects, who will then assign a project manager (PM) at IDOE. The IDOE PM will work with you to schedule a kickoff call.		
13	Develop additional questions for IDOE.		
14	Hold kickoff with IDOE and jointly review roadmap and any questions from either agency.		
15	Are there any unresolved questions at the end of the kickoff meeting?	Yes	Establish a timeline and ownership of resolving questions.
		No	Move to create an implementation timeline and draft data MOU.
	DEVELOPMENT, TESTING, AND TRAINING		
16	Do you and IDOE plan to integrate aspects of Ed-ID	No	Proceed to Ed-ID Portal Access (line 25).

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	into agency system(s) via an API?	Yes	Work with IDOE PM to facilitate calls between IDOE IT staff and your agency's IT staff or vendors to review the API.
17	Begin development.		
18	Does your development team have issues/questions for IDOE?	No	Proceed to next step.
		Yes	Work with IDOE PM to facilitate additional calls between IDOE IT staff and your agency's IT staff or vendors to review the API.
19	Identify users that need training.		
20	Work with IDOE PM to schedule joint demo with agency and IDOE staff.		
21	Provide training and outline user testing timeline.		
22	Did testers encounter issues needing clarification or resolution from IDOE?	Yes	Work with IDOE PM to facilitate calls between IDOE IT staff and data stewards (STN/SPN) and your agency's IT staff or vendors to review the API.
		No	Proceed to next step.
23	Identify go-live date.		
24	Review and update system documentation to incorporate Ed-ID business rules and staff responsibilities.		
	ED-ID PORTAL ACCESS (Manual Review Process)		*Note*: Some aspects of Ed-ID can only be accomplished through the Portal.
25	Do your users have access to state-provisioned Microsoft 365 Accounts?	No	Provision users with state Microsoft 365 accounts.
		Yes	Proceed to next step.
26	Provide initial list of users who need access to the portal to IDOE PM.		
27	Schedule training with IDOE PM.		
28	Conduct training and develop testing plan.		
29	Review results of testing with IDOE and confirm roles and responsibilities related to change requests for student data.		
30	Confirm go-live date and finalize data sharing agreement.		
31	Communicate production timeline to all users.		
	GO LIVE		
	POST-IMPLEMENTATION		
32	Confirm data steward and system administrator contacts and provide information to IDOE.		
33	CIO, data steward, and system administrator attend quarterly data governance calls (or as needed).		
34	Note any new issues and communicate to IDOE Director of Strategic Projects.		
35	Review data sharing agreement at least bi-annually.		