

Importing a Direct Certification File

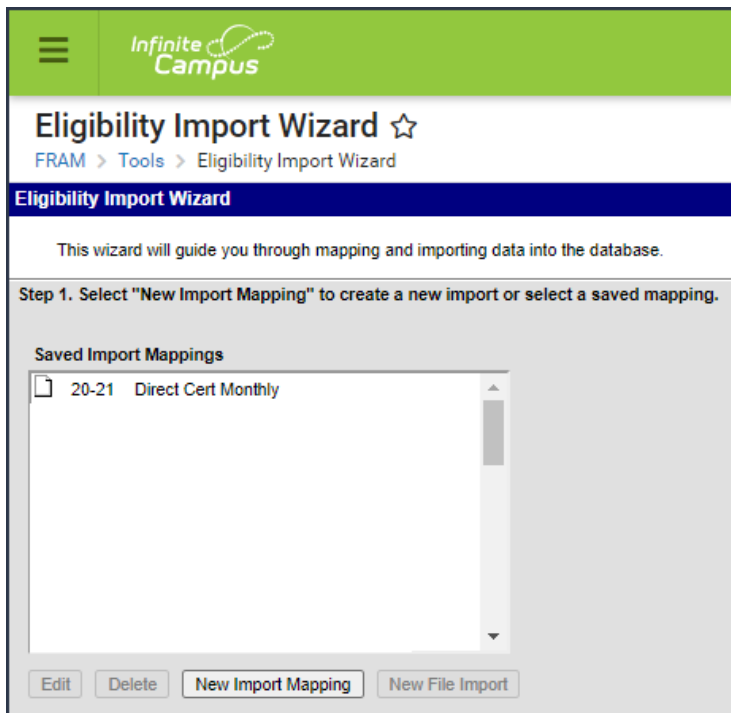
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Tool Search: Eligibility Import Wizard

The procedures described here allow you to import a Direct Certification file using the Eligibility Import Wizard.

When using the Eligibility Import Wizard, please keep the following in mind if you are importing a Direct file in the current year. If the eligibility record in the file includes a record that is the same rank as the pre-existing record but is a different Certified Type, Campus updates the pre-existing record to the new Certified Type. For example, if a child's current Certified Type is Foster (Free Direct) and the import file includes an eligibility record that is Runaway (Free Direct), Campus updates the Certified Type to Runaway.

If you are importing an eligibility file from a 3rd party system, see the [Importing a 3rd Party Eligibility File](#) article.



Step 1. Starting a New Import

To start the import process, create a mapping between the data file and the Campus database location in which the data values should be stored.

1. Click the **New Import Mapping** button from the setup screen.

Result

Step 2 of the Wizard displays.

- Go to **Step 2. Entering Import File Details**.

Step 2. Entering Import File Details

Step 2 of the wizard allows you to name the new import mapping and set specific parameters.

- Enter a **Name** for the new import. This name should represent the type of data the file contains.
- Select the **School Year** for which data is being imported.
- Select the format of the import file from the **File Type** field. The acceptable file formats are:
 - Fixed Width
 - Comma Separated Values
 - TAB Delimited
- Select the student identification option contained in the import file from the **Which field(s) in the data file will map to student identifiers?** field. One of the following types of student

identification must exist in the import file and be selected in this field:

- State ID
- Student Number
- Person ID
- Last Name, First Name, Birth Date (all three required)
- SSN (Social Security Number)

5. Indicate that you are importing a direct certification file by selecting **Yes** under the question **Is this a Direct Certification file?**

If importing a file with a combination of direct and non-direct/application eligibilities or if they are planning on using the file for scheduled imports, No should be selected. If Yes is selected when uploading those types of files, they will not upload correctly.

This option is not available to state-level users unless the user is a district-level user signing into a State Edition site.

6. Indicate whether the first row of the import file contains headers (identifying the content of each data column) by selecting Yes or No under the question **Does file include headers?**

The wizard does NOT import values from the header row.

7. Click the **Browse...** button to select the data file to be imported and click the **Open** button to return to the import wizard screen.
8. Click the **Upload & Continue** button to save this screen.

Result

Step 3 of the Wizard displays.

9. Go to [Step 3. Mapping Student Identifiers](#).

Step 3. Mapping Student Identifiers

Step 3 of the wizard allows you to map the contents of the import file to the Campus database. The contents of the import file are previewed in the Raw Data File box. After you map a column, it appears in the Mapped Data Field(s) box.

After you upload the file, Campus maps the file contents to the database through the student identifier:

Verify that the student identifier shown in the mapping editor reflects the student identifier contained in the import file (*i.e.*, if the Name column of the mapping editor lists Student Number, the import file actually contains student numbers). The value selected on the previous screen for the **Which fields in the data file will map to student identifiers?** is the data element(s) appearing in the mapping editor (*i.e.*, State ID, Student Number, Person ID, Social Security Number, or the set of Last Name, First Name and Birth Date).

Eligibility Import Wizard

Name	File Location	Format	Column Count	Row Count
10-11 CHS Eligibility	C:\temp\System-Administrator-2010-09-27-09-00-50\CHS_Eligibility_1011.csv	Comma Separated Values	7	477

Raw Data File

1	2	3	4	5	6	7
Student #	Last Name	First Name	Eligibility	Cert Type	Start Date	End
20535945	Addison	Don	Free	Income	9/1/2010	9/20
23831988	Adler	Justin	Paid	Foster	9/6/2010	9/20
23443894	Affon	Trin	Reduced	Income	10/1/2010	9/20

Mapped Data Field(s)

Student Number
20595945
23831988
23443894
23423894

Step 3. Select mapping. Indicate the position of the data field(s) from the imported Raw Data File then select "Map Field(s)". This mapping will be used to match the data in the import file to student identifiers existing in the database. Select "Next" to continue.

Name	Seq in Data File	Map to Data Field	Strip Leading Zeros
Student Number	1	student.studentNumber	<input type="checkbox"/>

Mapping editor

Map Field(s)

The student identifier selected in the **Which Fields** in the data file will map to student identifiers field of the previous screen is displayed.

This column/data must be mapped first.

Previous Next

1. Enter the Raw Data File column number(s) containing student-identifying information in the **Seq in Data File** field(s) of the mapping editor.

Fixed-width Files Only

If importing from a fixed-width file, enter values related to the student identifier in the **Start Position** and **Characters Long** fields.

2. Mark the checkbox(es) in the **Strip Leading Zeros** column of the mapping editor if the student identifier values of the data file start with zero(s) that should be removed before importing.
3. Click the **Map Fields** button to save the mapping of student-identifying data from the import file to the Campus database.
4. Click the **Next** button.

Result

Step 4 of the wizard displays.

5. Go to **Step 4. Entering Values**.

Step 4. Entering Values

Step 4 of the wizard allows you to identify the Direct Certified Type(s) to be imported.

Eligibility Import Wizard

Name	File Location	Format	Column Count	Row Count
FRAM 2017	C:\batchTest\batchQueue\entropyMaster\49348\2017-10-17-10-52-14\FRAM 2017.csv	Comma Separated Values	8	5

Raw Data File

1	2	3	4	5	
Unique ID	Eligibility Type	EligibilityType	Certified Type	Start Date	End
12345	Free	Medicaid	Direct	9/1/2017	6/1
23456	Free	SNAP	Direct	9/1/2017	6/1

Import Data Field(s)

Eligibility	DirectType
Free	Medicaid
Free	SNAP
Free	TANF
Reduced	Foster

Step 4. Select "Yes" to set the same Direct Certified Type value for all students on the file. Select "No" to map a unique value for each student on the file. Review mapped fields in the Import Data Field(s) section above. Select "Next" to continue.

* Is the eligibility the same for all students? ☐ Yes ☒ No

Seq in Data File: 2

* Is the Direct Certified Type the same value for all students? ☐ Yes ☒ No

Seq in Data File: 3

* Eligibility Start Date
9/01/2017

* Eligibility End Date
06/01/2018

1. Answer **Yes** or **No** to the question "Is the eligibility the same for all students? "

- Select **Yes** to set the same eligibility value for all students on the file.

* Is the eligibility the same for all students? ☒ Yes ☐ No

Free

Free
Reduced
Paid
Non-reimbursable

- Select **No** to map a unique value for each student on the file.

Step 4. Select "Yes" to set the same Direct Certified Type value for all students on the file. Review mapped fields in the Import Data Field(s) section above.

* Is the eligibility the same for all students? ☐ Yes ☒ No

Seq in Data File: 2

* Is the Direct Certified Type the same for all students? ☐ Yes ☒ No

Seq in Data File: 3

* Eligibility Start Date: 9/01/2017

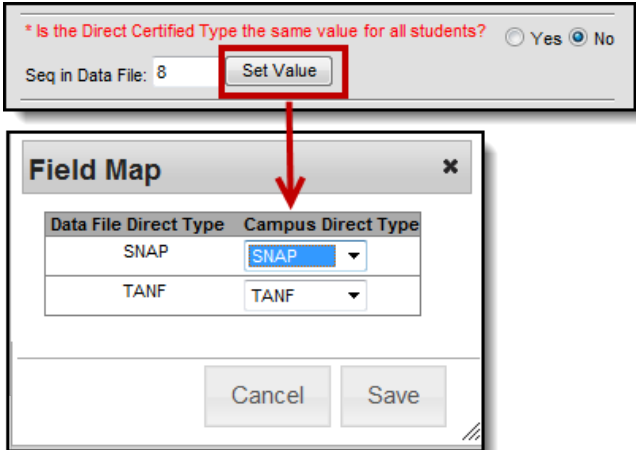
* Eligibility End Date: 06/01/2018

Field Map

Data File Eligibility	Campus Eligibility
Free	Free
Reduced	Reduced

- Answer **Yes** or **No** to the question "Is the Direct Certified Type the same value for all students?"

If the Direct Certified Type is...	Then...
the same for all students	<p>select the type from the dropdown list.</p> <div> <p>* Is the Direct Certified Type the same value for all students? <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>SNAP</p> <p>SNAP</p> <p>TANF</p> <p>FDPIR</p> <p>Foster</p> <p>Head Start</p> <p>Homeless</p> <p>Medicaid</p> <p>Migrant</p> <p>Runaway</p> </div>

If the Direct Certified Type is...	Then...
unique for each student	<p>enter the column number of the Raw Data File that contains certified type data and click the Set Value button. The Field Map window displays. Map the value from the file to a value in Campus by selecting an option from the Campus Direct Type dropdown list.</p> 

3. Enter the first day on which the Eligibility is active in the **Eligibility Start Date** field.
4. Enter the last day on which the Eligibility is active in the **Eligibility End Date** field.
5. Click the **Next** button.

Result

Step 4 of the wizard displays.

6. Go to **Step 5. Confirmation Review**.

Step 5. Confirmation Review

After values from the import file have been mapped and saved, the import can be reviewed, tested and imported. Fields on this screen display according to previously selected options.

Field	Description
Exclude Applications	<p>If a household application associated with a student import file should be excluded, mark the Exclude Applications checkbox. Marking this checkbox will compare the students in the import file to the students on the household application; if the students match, the application will be excluded from the Verification process. For example, Direct Certification applications should not be processed, but a district may process a number of applications for households of students included in the Direct Certification file before it is received. These applications should not be included in Verification. If the Exclude Applications checkbox is used, these applications will be excluded and will not be included in Verification. If the Exclude Applications checkbox is not used, these applications may be included in Verification unless a user manually deletes or excludes the application.</p> <p>If all students match and the Start Date entered for the import is before or the same as the Start Date entered on the Household Application, then the Household Application will show on the Eligibility Import Report under the section Excluded.</p> <p>If all students match and the Start Date entered for the import is after the Start Date entered on the Household Application, the Household Application will not show on the Import Report.</p> <p>If not all students on the Household Application match the students appearing on the file and the Start Date entered for the import is before or the same as the Start Date entered on the Household Application, then the Household Application will show on the Eligibility Import Report under the section Not Excluded with a reference in the Action column to the students on the application who were not included on the import file. When the Exclude Household Application checkbox is NOT selected by the user, any Household Applications that have all of the same students as the import file and also meet the Start Date criteria previously mentioned will show on the Eligibility Import Report under the section Not Excluded. This gives users the option to review these applications for possible manual exclusion.</p>

Field	Description
Extend Direct Certification Status to Additional Students in Household	<p>If all students in the same household as the import student should be assigned a Direct Certification eligibility status (even when not included in import file), mark the Extend Direct Certification Status to Additional Students in Household checkbox. Marking this checkbox will compare the student in the import file to the student(s) listed in the primary household or at the same address. Students in the household who do not have existing eligibilities will be assigned the same eligibility status as the student included in the import file.</p> <p>If the FRAM Preference option is set, users may also extend the Medicaid Direct Certified Type.</p> <div> <p>Districts Importing Direct Certification files for Medicaid : When using the Eligibility Import Wizard and selecting the option for Extending benefits to additional students in the household, this option will only extend benefits to students in the same household <i>who are NOT included in the Direct Certification file</i> . If you are importing a Medicaid Direct Certification file containing both Free and Reduced eligibility, a best practice is to split the Direct Certification file by Free status and Reduced status. Once split, upload the files in order of the most advantageous status first (Free first, then Reduced) and mark the <i>Extend benefits to additional students in the household</i> option. This will ensure that, students in the same household with differing Free/Reduced statuses on the Direct Certification file are extended the Free eligibility along with any student household members not on the file.</p> </div>
Include Updated Records Detail on Report	Mark this checkbox to display names and details of students affected by the import on the Eligibility Import Report.
Report Format	The Eligibility Import Report can be generated as a PDF or Comma Separated Values (CSV) file. Large files, 15,000 records or more, must use the CSV option.
Batch Import Options	This option is only available if the Batch Queue tool is enabled. These radio buttons determine whether the Batch Test or the Batch Import button displays.

Testing and Importing the File

Remember, when testing the upload, the test results may not match the final upload if the upload file includes multiple/duplicate entries for the same student. The test logic looks at the final entry in the upload file and uses that eligibility whereas the final upload applies additional logic. See the [FRAM Eligibility Standards and Guidelines](#) for important information.

	A	B	C	D	E
1	STUDENT_NUMBER	LNAME	FNAME	SOURCE	PROGRAM
2		39879	SMITH	ADAM	DIRECT
3		39879	SMITH	ADAM	DIRECT
4		39879	SMITH	ADAM	DIRECT
5		39879	SMITH	ADAM	DIRECT

Upload File

Test File

THIS IS A TEST. NO DATA IS WRITTEN TO THE DB.

Summary

New	Ended	Removed	Existing	Errors/Warnings
4	0	0	0	1

Updated Records

Name	School Year	Start Date	End Date	Eligibility Type	Eligibility	Source	Certified Type	Status
Smith, Adam R	2018	09/01/2017	10/01/2018	Meal	Free	Direct	Medicaid	New
Smith, Adam R	2018	09/01/2017	10/01/2018	Meal	Free	Direct	Foster	New
Smith, Adam R	2018	09/01/2017	10/01/2018	Meal	Free	Direct	TANF	New
Smith, Adam R	2018	09/01/2017	10/01/2018	Meal	Free	Direct	Foster	New

Final Upload

Updated Records

Name	School Year	Start Date	End Date	Eligibility Type	Eligibility	Source	Certified Type	Status
Smith, Adam R	2018	09/01/2017	10/01/2018	Meal	Free	Direct	Medicaid	New
Smith, Adam R	2018	09/01/2017	10/01/2018	Meal	Free	Direct	Medicaid	Removed
Smith, Adam R	2018	09/01/2017	10/01/2018	Meal	Free	Direct	Foster	New
Smith, Adam R	2018	09/01/2017	10/01/2018	Meal	Free	Direct	Foster	Removed
Smith, Adam R	2018	09/01/2017	10/01/2018	Meal	Free	Direct	TANF	New

Eligibility

+ New

School Year	Eligibility Type	Eligibility	State Code	Certified Type	Start Date	End Date
17-18	Meal	Free	F	Direct TANF	09/01/2017	10/01/2018
16-17	Meal	Free	F	Direct SNAP	08/09/2016	07/31/2017
15-16	Meal	Free	F	Direct SNAP	08/13/2015	08/08/2016
14-15	Meal	Free	F	Direct SNAP	08/14/2014	08/12/2015
13-14	Meal	Free	F	Direct SNAP	02/25/2014	08/13/2014

Eligibility Tab with New Eligibility

Follow the procedures for one of the following options.

Option	Description
1	Test and Import a Standard File This option is best for average files (less than 3,000 rows).
2	Batch Test and Import Large Files If you are testing and importing large files (3,000 rows or more), the standard test and import process may time out because of district browser and router settings. Instead, Infinite Campus recommends using the Batch Queue and Scheduled Import tool. If you do not have Batch Queue enabled on your Campus site, you can contact Campus Support and request the Batch Queue tool be enabled.

Option 1-Test and Import a Standard File

Infinite Campus does not recommend importing data without first using the Test feature to review the anticipated import results. Imports cannot be reverted.

1. Click the **Test** button to generate the [Eligibility Import Report](#) preview of how the values of the import file will be imported to the database.

The import mapping is automatically saved and may be imported at a later time. If a student appears multiple times on the import file, the student will appear multiple times on the [Eligibility Import Report](#).

2. Adjust the data file contents and/or mappings if necessary.
3. Click the **Import** button.
4. Click **OK** on the pop-up window to confirm the import.

Result

A PDF or CSV report is generated and indicates import results. Eligibility values are imported to student records on the [Eligibility](#) tool.

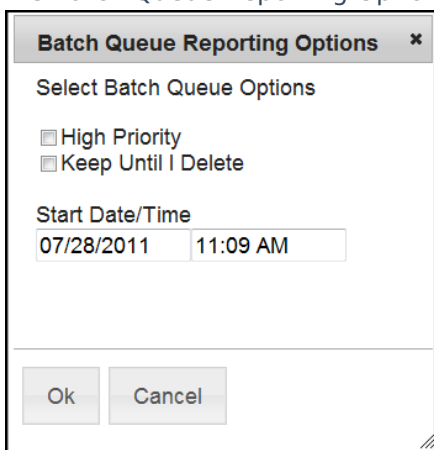
Option 2-Batch Test and Import Large Files

The [Batch Queue](#) tool must be enabled to use this option. If you want your users who import large files to enable the Batch Import/Batch Test **High Priority** and **Keep until I delete** checkboxes, your users need Tool Rights to Ad Hoc Reporting > Batch Queue > Set Task Expiration and Set Task Priority. If a user does not have these Tool Rights, the boxes will appear but not be active. In addition, a user without access to System Administration > Batch Queue will not be able to check on the status of the import, and will only know if it runs successfully when the Eligibility Import Report appears in their Process Inbox.

1. Select the **Test** option in the **Batch Import Options** field to generate the [Eligibility Import Report](#) preview of how the values of the import file will be imported to the database.
2. Click the **Batch Test** button.

Result

The Batch Queue Reporting Options window displays.



Batch Queue Reporting Options ✕

Select Batch Queue Options

☐ High Priority

☐ Keep Until I Delete

Start Date/Time

07/28/2011 11:09 AM

Ok Cancel

3. Use the following information to complete the configuration options on the Batch Queue Reporting Options window.

Field	Description
High Priority	<p>Mark this checkbox if running this report is considered a high priority. Reports designated as "high priority" by this checkbox will take precedence over other reports in the Batch Queue that are not designated as such.</p> <p>This checkbox can only be marked if a user has the proper tool right access (<i>i.e.</i>, at least R rights to the Set Task Priority sub-right located in the Tool Rights index under Ad Hoc Reporting > Batch Queue).</p>
Keep Until I Delete	<p>Mark this checkbox if the completed report results should continue to appear on the Batch Queue and Admin Queue tools until manually deleted by a user. If this checkbox is not marked, the completed report will be cleared from the Batch Queue and Admin Queue tools based on the frequency for the Batch Queue Maintenance task set within the Task Scheduler.</p> <p>This checkbox can only be marked if a user has the proper tool right access (<i>i.e.</i>, at least R rights to the Set Task Expiration sub-right located in the Tool Rights index under Ad Hoc Reporting > Batch Queue).</p>
Start Date/Time	<p>Indicate the date and time at which the Batch Queue should begin to generate the report.</p>

- Click the **OK** button.

Result

The Success window displays.

- Click **OK** to submit this report to the [Batch Queue](#). While waiting for the Batch Test to complete, exit the Eligibility Import Wizard.

Result

The report will wait for the date and time scheduled for generation. Upon completion, the [Eligibility Import Report](#) is available in the [Process Alerts \(formerly Process Inbox\)](#) for your review.

Process Inbox

Date Range to Display **All Processes**

<input type="checkbox"/>	<input type="checkbox"/>	Process	Name	Posted Date	Due Date
<input type="checkbox"/>	<input type="checkbox"/>	Batch Report Complete	Eligibility Import Report	07/28/2011	

The import mapping is automatically saved and may be imported at a later time.

- Return to Step 1 of the wizard and select your Saved Import Mapping.

Example

Eligibility Import Wizard

This wizard will guide you through mapping and importing data into the database.

Step 1. Select "New Import Mapping" to create a new import or select a saved mapping.

Saved Import Mappings

<input type="checkbox"/>	13-14 Campus Import Mapping
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- Click the **Edit** button.
- Adjust the data file contents and/or mappings if necessary and continue to Step 5 of the wizard.
- Select the **Import** option in the **Batch Import Options** field.

Example

You may Test or Import your file. Infinite Campus recommends testing the file before importing into the database.

Include Updated Records Detail on report ☒

Report Format ☐ PDF Report ☒ Comma Separated Values (CSV)

Batch Import Options ☐ Test ☒ **Import**

- Click the **Batch Import** button.

Result

The Batch Queue Reporting Options window displays.

- Repeat steps 3-5.

If the batch is still in Pending status in System Administration > [Batch Queue](#) and you change the School Year criteria for the import, the School Year will change for the Pending import in the Batch Queue. Do not change the criteria for any import in Pending status in the [Batch Queue](#).

