

# Eligibility Import Wizard

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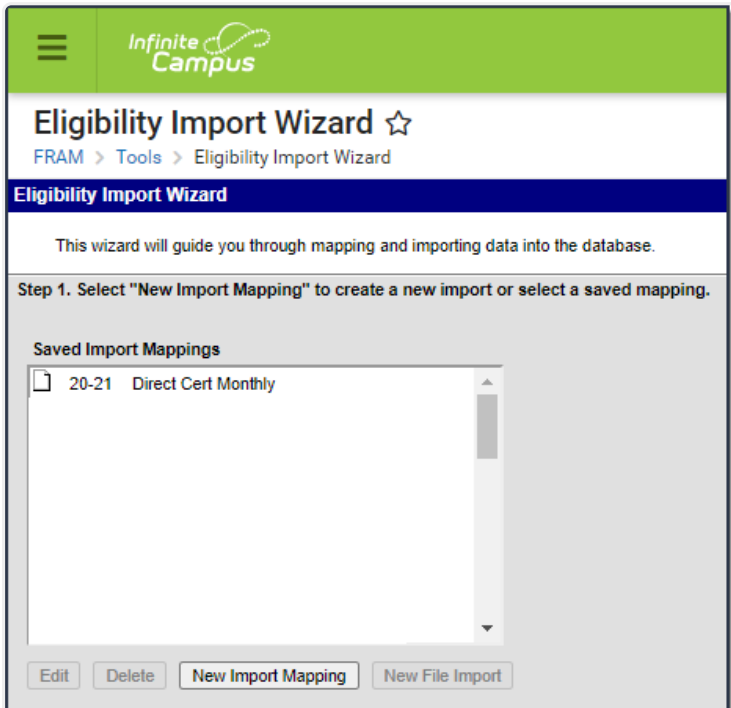
**Classic View:** FRAM > Eligibility Import Wizard

**Search Terms:** Eligibility Import Wizard

Use the Eligibility Import Wizard to upload and import data files containing student meal service and socioeconomic eligibilities. The Eligibility Import Wizard includes steps for mapping values from the data file to the Campus database for state-reporting and food service purposes. Campus transfers imported student eligibility data to the **Eligibility** tool.

See the [FRAM Eligibility Standards and Guidelines](#) for important information. The [FRAM Eligibility Standards and Guidelines](#) article is meant to help you establish eligibility determinations as well as provide you with the details necessary for understanding what happens to a child's eligibility status when you import an eligibility file using the Eligibility Import Wizard.

| What can I do?  | What do I need to know   |
|---|--|
| <a href="#">Import a 3rd Party Eligibility File</a><br><a href="#">Import a Direct Certification File</a> | <a href="#">Important Information about this Tool</a><br><a href="#">Import File Requirements</a><br><a href="#">Eligibility Import Report Example</a> |



*Eligibility Import Wizard*

# Important Information about this Tool

- Import files may contain Direct Certification Types.
- If more than one type of eligibility value exists in the import file, the values must be mapped to existing values in the database.
- The wizard allows the values within the data file to be imported "as is" (keep original values), *OR* allows the user to select a value to be mass-assigned to all students through the import.
- Reminder, 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.
- **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 *who are NOT included in the Direct Certification file*. 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 *Extend benefits to additional students in the household* 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.
- A complete import and its associated mapping may be saved and re-used.
- **State-Level Imports**: The Eligibility Import Wizard available to state-level users has the following, additional requirements/restrictions.
  - The wizard can only be used to import eligibilities for students enrolled in the district importing the file.
  - The import wizard will only display import mappings from the district to which the currently logged in user has access rights.
  - To complete an import, you must be logged in as as a user with access rights to the district and NOT as a state-wide user.

Although an Eligibility Import Mapping may be re-used, you cannot change the file from a Direct Certification file to a 3rd Party Eligibility file and vice versa.

## Import File Requirements

The Eligibility Import Wizard has the following requirements of all import files:

- **File Format**. Import data must be formatted as a fixed-width, comma-delimited or tab-delimited file.
- **Unique ID**. Information identifying the students must be included in the file. The import wizard accepts only the following types of information as the Unique ID: Person ID, State ID, Student Number, SSN, or the set of Last Name, First Name and Birth Date.
- **Existing Person Record**. The student must exist in the Campus database.
- **School Year Limitation**. Data within the file should reflect only one school year.

- **Medicaid/SCHIP Opt Out Preferences.** If the district/state has configured the **Medicaid Opt Out** or **SCHIP Opt Out** fields for use in **FRAM Preferences**, a column should be included in the import file containing a "Y" or "N" value.

Campus does not recommend mapping the same column in an import file to multiple Campus fields.

The following items can be mapped on the import file or set as the same value for all students on the file:

- Eligibility Type
- Eligibility
- Eligibility Start Date
- Eligibility End Date

#### Additional Requirements for State Level Use

**District ID.** The District ID of the district assignment for the current user is required and is used to identify the district for which the import can be performed. A user cannot import data for students enrolled in other districts.

The fields that display depend on the type of file being imported. Each type of file (.csv, fixed-width, tab delimited, etc.) displays different mapping criteria. Only a mapping for the student identifier type selected is created. If Last Name, First Name, Date of Birth fields are selected, a mapping is created for each of those fields.

- A fixed-width file type enables the Start Position and Characters Long fields in the wizard.
- Tab delimited and .csv file types have a Sequence field in the data file.

### 3rd Party Eligibility File Requirements

The following items must be included when [importing a 3rd Party Eligibility file](#):

- Unique ID
- Certified Type AND/OR
- Direct Type
- Medicaid Opt Out (When selected in FRAM Preferences)
- SCHIP Opt Out (When selected in FRAM Preferences)
- Free Milk (NE/NH districts only)
- Does Not Participate (BIE districts only)

## Eligibility Import Report Example

The following image is an example of the Eligibility Import Report that users can generate at the end of the [Eligibility Import Wizard](#).

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

**Summary**

| New | Ended | Removed | Existing | Errors/Warnings |
|-----|-------|---------|----------|-----------------|
| 0   | 0     | 0       | 15       | 0               |

**Error/Warning**

**Existing Eligibility Records**

| Name                              | School Year | Start Date | End Date   | Eligibility Type | Eligibility | Source | Certified Type | Medicaid Opt Out | SCHIP Opt Out |
|-----------------------------------|-------------|------------|------------|------------------|-------------|--------|----------------|------------------|---------------|
| Esteban, Margaret Anne-Kathryn    | 2013        | 09/01/2012 | 10/15/2013 | Meal             | Free        | Direct | SNAP           | Yes              | No            |
| Esteban, Preston Jaye Michael     | 2013        | 12/06/2012 | 10/16/2013 | Meal             | Free        | Direct | Medicaid       | No               | No            |
| Esteban, Christopher Joseph       | 2013        | 12/06/2012 | 10/16/2013 | Meal             | Free        | Direct | Medicaid       | No               | No            |
| Esteban, Carlene Justice Kristine | 2013        | 06/21/2012 | 10/18/2013 | Meal             | Free        | Direct | SNAP           | No               | No            |
| Evans, James Joseph               | 2013        | 12/06/2012 | 10/16/2013 | Meal             | Free        | Direct | Medicaid       | No               | No            |
| Evans, Jordan Thomas              | 2013        | 12/06/2012 | 10/16/2013 | Meal             | Free        | Direct | Medicaid       | No               | No            |
| Evans, Christopher Jason          | 2013        | 12/06/2012 | 10/16/2013 | Meal             | Free        | Direct | Medicaid       | No               | No            |
| Evans, Kayla Marie                | 2013        | 12/06/2012 | 10/16/2013 | Meal             | Free        | Direct | Medicaid       | No               | No            |
| Evans, Hector Jairo               | 2013        | 06/21/2012 | 10/18/2013 | Meal             | Free        | Direct | SNAP           | No               | No            |
| Evans, Justin Anthony             | 2013        | 06/21/2012 | 10/18/2013 | Meal             | Free        | Direct | SNAP           | No               | No            |
| Evans, Gilda                      | 2013        | 12/06/2012 | 10/16/2013 | Meal             | Free        | Direct | Medicaid       | No               | No            |
| Evans, Cheryl Christine           | 2013        | 06/21/2012 | 10/18/2013 | Meal             | Free        | Direct | SNAP           | No               | No            |
| Farrell, Brad Vernon              | 2013        | 07/01/2012 | 09/02/2012 | Meal             | Free        | Direct | SNAP           | No               | No            |
| Farrell, Rene Ellen               | 2013        | 07/01/2012 | 09/02/2012 | Meal             | Free        | Direct | SNAP           | No               | No            |
| Fisher, Grant Shawn               | 2013        | 12/06/2012 | 10/16/2013 | Meal             | Free        | Direct | Medicaid       | No               | No            |

**Not Excluded**

| Application Name | Reference # | Children | Action |
|------------------|-------------|----------|--------|
|                  |             |          |        |

**Additional Direct Certified Eligible Students**

| Household Name | Student Name | Updated |
|----------------|--------------|---------|
|                |              |         |

| Report Section       | Description  |
|----------------------|--|
| <b>Summary</b>       | This section indicates the anticipated success of the import as related to the number of records that will be updated. The anticipated number of new, ended, removed and existing eligibilities, as well as errors/warnings will be displayed. |
| <b>Error/Warning</b> | This section indicates anticipated problems with the import, such as non-matching student identifiers / unique IDs ( <i>e.g.</i> , last name, first name, birth date, state ID, student number), missing data, incorrect file lengths, etc.    |

| Report Section                             | Description  |
|--|--|
| <p><b>Updated Records</b></p>              | <p>This section indicates the records that will be inserted into the Campus database. This section will only appear when the "Include Updated Records Details on Report" checkbox is marked before testing. Overlapping records are not allowed. 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. See the <a href="#">FRAM Eligibility Standards and Guidelines</a> article for more information.-</p> <p>The following types of updated records are available:</p> <ul style="list-style-type: none"> <li>• <b>New</b> - No eligibility exist in the database for the current year; therefore, the new eligibility status from the source file will be imported. Carryover eligibilities will be appropriately ended on the day prior to the start date indicated by the import file.</li> <li>• <b>New / Ended</b> - An eligibility exists in the database for the current year; therefore, the new eligibility status will be imported and the existing current year eligibility will be ended. (For example, an income/categorical/foster application with a start date prior to the start date of the import file was already entered in the database for a student, so the existing eligibility must be ended the day prior to the start date of the imported eligibility. This is due to the USDA requirement that Direct Certification eligibilities take precedence over income/categorical/foster applications for the same school year. An application should not have been processed.)</li> <li>• <b>New / Removed</b> - An eligibility exists in the database for the current year. The new eligibility status from the import file will be used to replace the (removed) existing record. (For example, if an existing income/categorical/foster application has a start date that is the same as or later than the start date of the import file eligibility it must be removed as two eligibilities with the same start date are not allowed. This is due to the USDA requirement that Direct Certification files take precedence over income/categorical/foster applications existing in the current year. An application should not have been processed.)</li> <li>• <b>Postponed</b> - Campus assigns this status when there is an eligibility record that has a start date postponed to a later date.</li> </ul> |
| <p><b>Existing Eligibility Records</b></p> | <p>This section indicates an eligibility record already exists for the indicated student. If an eligibility record exists for the student, it will not be overwritten by the import. Additional follow-up may be required after importing to determine the proper eligibility types to be assigned to these students. See the topic <a href="#">FRAM Eligibility Standards and Guidelines</a> for more information.</p>  |

| Report Section                                       | Description  |
|--|--|
| <b>Not Excluded</b>                                  | <p>This section indicates which applications of students with Direct Certification eligibilities will not be excluded from the <a href="#">Verification</a> process (even though the "Exclude Applications" checkbox was flagged in <i>Step 5. Test and Import</i>). An application may not be excluded for one of the following reasons:</p> <ul style="list-style-type: none"> <li>• If the household application has more or less students than the import file, it cannot be excluded. The import file must contain the same students as the application to be allowed for exclusion.</li> <li>• If the household application start date is prior to the start date of the import file, the application cannot be excluded, as the eligibility will end one day prior to the start date set in the import file.</li> </ul> |
| <b>Excluded</b>                                      | <p>This section indicates that the "Exclude Applications" checkbox was flagged and that students in the import file matched students on the household application. These students/applications will not be included in the <a href="#">Verification</a> process.</p>   |
| <b>Additional Direct Certified Eligible Students</b> | <p>This section indicates the "Extend Direct Certification Status to Additional Students in Household" checkbox was flagged and that additional students listed on the same application as students in the import file will have their existing eligibilities updated to a Free / Direct Certification eligibility status.</p>   |

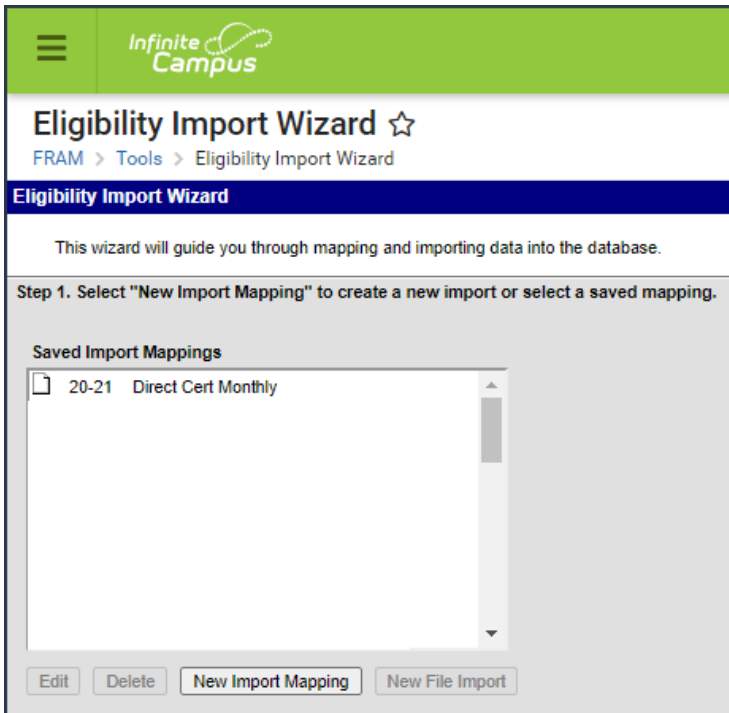
## Import a 3rd Party Eligibility File

▶ [Click here to expand...](#)

Tool Search: Eligibility Import Wizard

The procedures described here allow you to import eligibility from a 3rd party system that may have a combination of non-direct and direct certification eligibilities.

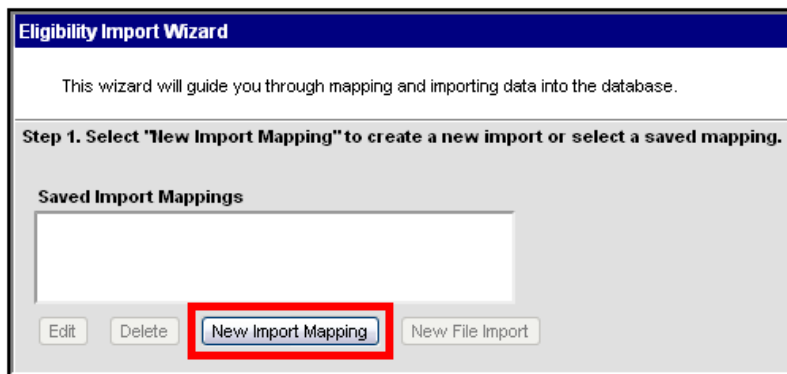
If you are importing a direct certification file, see the [Importing a Direct Certification File](#) article.



## Step 1. Starting a New Import

To start the import process, create a mapping between the eligibility 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.



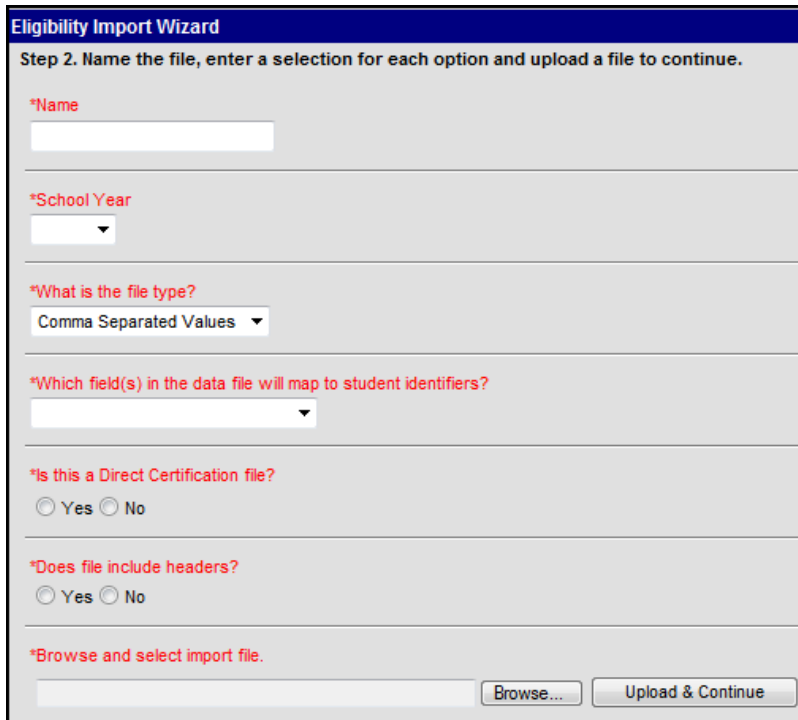
### Result

Step 2 of the Wizard displays.

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

## Step 2. Entering Eligibility File Details

Step 2 of the wizard allows you to name the new import mapping and set specific parameters. This screen is also where you identify whether you are importing unique eligibility statuses or assigning the same eligibility status to all students in the eligibility file.



1. Enter a **Name** for the new import. This name should represent the type of data the file contains.
2. Select the **School Year** for which data is being imported.

Each year, eligibility mappings need to be edited or created as new for the new school year.

3. Select the format of the eligibility file from the **File Type** field. The acceptable file formats are:
  - Fixed Width
  - Comma Separated Values
  - TAB Delimited
4. Select the student identification option contained in the eligibility 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 eligibility 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)
  - Other ID (Maps to NASIS ID for BIE Only)
5. Select **No** 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 eligibility 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 eligibility 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 eligibility file to the Campus database. The contents of the eligibility 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 eligibility file (*i.e.*, if the Name column of the mapping editor lists Student Number, the eligibility 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** 10-11 CHS Eligibility **File Location** C:\temp\System-Administrator-2010-09-27-09-00-50\CHS\_Eligibility\_1011.csv **Format** Comma Separated Values **Column Count** 7 **Row Count** 477

| Raw Data File |           |            |             |           |            |      | Mapped Data Field(s) |
|---------------|-----------|------------|-------------|-----------|------------|------|----------------------|
| 1             | 2         | 3          | 4           | 5         | 6          |      | Student Number       |
| Student #     | Last Name | First Name | Eligibility | Cert Type | Start Date | End  | 20595945             |
| 20555945      | Addison   | Don        | Free        | Income    | 9/1/2010   | 9/20 | 23831988             |
| 23831988      | Adler     | Justin     | Paid        | Foster    | 9/6/2010   | 9/20 | 23443894             |
| 23443894      | Affnn     | Trin       | Reduced     | Income    | 10/1/2010  | 9/20 | 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 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 eligibility 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. Identifying Fields to Import

Step 4 of the wizard allows you to identify the fields you want to import from the eligibility file to the Campus database. Step 5 - Setting Values allows you to select values for the fields that you do not import.

**Eligibility Import Wizard**

| Name                | File Location   | Format                    | Column Count | Row Count |
|---------------------|---|---------------------------|--------------|-----------|
| * Unique<br>non SES | C:\CampusDocumentStore\ieBatchAppShare\batchQueue\iefs\2\2012-11-12-07-05-33\WC WSH CSV.csv | Comma Separated<br>Values | 14           | 12        |

**Raw Data File**

| 1                | 2                | 3                 | 4                 | 5                     | 6               | 7           | 8      | 9     | 10     |
|------------------|------------------|-------------------|-------------------|-----------------------|-----------------|-------------|--------|-------|--------|
| student.personID | student.lastName | student.firstName | student.birthdate | student.studentNumber | EligibilityType | Eligibility | CT     | Optin | Optin2 |
| 38769            | SMITH            | Nicholas          | 2/23/1996         | 60013                 | Meal            | Free        | Direct | y     | n      |
| 38771            | SMITH            | Patrick           | 12/19/1994        | 60014                 | SES             | Free        | Income | y     | n      |

**Step 4. Select "Yes" next to fields that will be mapped from the imported Raw Data File to a field in the database. "Yes" must be selected for at least one of the following values: "Certified Type" or "Direct Type." Select "No" to indicate any same values that will be set for all students on the file. Select "Next" to continue.**

Eligibility Type    Yes    No  
Eligibility    Yes    No  
Certified Type    Yes    No  
Direct Type    Yes    No  
Start Date    Yes    No  
End Date    Yes    No

1. Select **Yes** or **No** next to all of the options.
  - Select **Yes** next to fields that will be mapped from the imported file to a field in the database. You must select **Yes** for one of the following fields.

| Field                 | Description  |
|-----------------------|--|
| <b>Certified Type</b> | This field stores Non-direct Source Certified Types. Non-direct source certified types are determined from methods other than a local or state agency file. For example, a non-direct source may be a submitted meal benefits application or the determination by a district coordinator that a student is Homeless, Migrant, Runaway, Head Start etc. |
| <b>Direct Type</b>    | This field stores Direct Source Certified Types. Direct Source Certified Types are determined by receiving a file or list of eligible students from a state or local agency indicating the student is eligible for Free meal benefits.   |

- Select **No** if you are not importing a value from the file. If you select No, you will be able to select a value for the field in Step 5 of the wizard. Selecting No also indicates that the value for that field is the same for every student. For example, select No for the Eligibility field if every student's Eligibility Status is SES.
2. Click **Next** to continue to **Step 5. Selecting Values**.

## Step 5. Setting Values

To import values contained in the eligibility file, this step has you map those values to accepted values within the Campus database. This step also allows you to select values for fields that are not part of the eligibility file.

All fields shown must be mapped. If the eligibility file does not contain this information, it must be modified, saved and re-uploaded. When all values have been mapped, click the **Next** button

to proceed to review and import the data.

**Eligibility Import Wizard**

| Name        | File Location  | Format                 | Column Count | Row Count |
|-------------|--|------------------------|--------------|-----------|
| 12-13       | C:\CampusDocumentStore\ieBatchAppShare\batchQueue\iefs\2\2012-12-11-13-18-28 | Comma Separated Values | 12           | 39        |
| Campus Elig | VC\SV 12-13 Campus Eligibilities.csv   |                        |              |           |

| 3                 | 4                     | 5                | 6     |
|-------------------|-----------------------|------------------|-------|
| student.birthdate | student.studentNumber | student.personID | stude |
| 2/20/1997         | 1952468914            | 3358             | 144   |
| 4/14/1998         | 1943414092            | 30098            | 1244  |

| Eligibility | StartDate  | MedicaidOptOut | SCHIPOptOut | DirectT |
|-------------|------------|----------------|-------------|---------|
| Free        | 09/01/2012 | Yes            | Yes         | SNAI    |
| Free        | 09/01/2012 | Yes            | Yes         | SNAI    |
| Free        | 09/01/2012 | Yes            | Yes         | SNAI    |

**Step 5. Select the values that will be the same for all students on the file. For unique values, indicate the location of the field that will be mapped on the file. Select "Set Value" to map each field from the imported Raw Data File to a field in the database. Review the mapped fields in the Import Data Field(s) section above. This mapping imports a unique value for each student in the file. Select "Next" to continue.**

\* Eligibility Type  
 Meal  ← For this example, these fields are not being imported from the raw data file.

\* Eligibility  
 Seq in Data File: 9

\* Certified Type will not be mapped based on selecting No in Step 4. When importing a Direct Certification File from a Local or State agency, Infinite Campus recommends using the Direct Certification file option in Step 2.

\* Direct Type  
 Seq in Data File: 8

\* Start Date  
 Seq in Data File: 12

\* End Date  
 10/16/2013  ← These values only appear if the Display Medicaid Opt Out and/or Display SCHIP Opt Out checkboxes are marked in FRAM Preferences.

\* Medicaid Opt Out  
 Seq in Data File: 10

\* SCHIP Opt Out  
 Seq in Data File: 11

| If you are...                                      | Then...   |
|--|---|
| importing values contained in the eligibility file | complete the following steps. <ol style="list-style-type: none"> <li>1. Enter the column number of the Raw Data File that contains the values you want to import.</li> <li>2. Click <b>Set Value</b>.</li> </ol> <p><b>Result</b></p> <p>The Field Map window displays.</p> <ol style="list-style-type: none"> <li>3. Map the data file's values to the database by selecting options from the Campus fields.</li> <li>4. Click <b>Save</b>.</li> </ol> |

| If you are...   | Then...   |
|---|---|
| selecting values for fields that are not part of the eligibility file | select an option from the dropdown list or select a date for date fields. |

| Field                   | Available Options   |
|-------------------------|---|
| <b>Eligibility Type</b> | <ul style="list-style-type: none"> <li>• Meal</li> <li>• SES</li> </ul>   |
| <b>Eligibility</b>      | <ul style="list-style-type: none"> <li>• Free</li> <li>• Reduced</li> <li>• Paid</li> <li>• Non-Reimbursable</li> </ul>   |
| <b>Certified Type</b>   | <ul style="list-style-type: none"> <li>• Direct</li> <li>• Income</li> <li>• Categorical</li> <li>• Override</li> <li>• Runaway</li> <li>• Homeless</li> <li>• Foster</li> <li>• Migrant</li> <li>• Head Start</li> <li>• RCCI</li> <li>• Early Childhood</li> <li>• Medicaid</li> <li>• Declined</li> <li>• Denied</li> <li>• Did Not Apply</li> <li>• Socioeconomic Status</li> </ul> |
| <b>Direct Type</b>      | <ul style="list-style-type: none"> <li>• SNAP</li> <li>• TANF</li> <li>• FDPIR</li> <li>• Foster</li> <li>• Head Start</li> <li>• Homeless</li> <li>• Medicaid</li> <li>• Migrant</li> <li>• Runaway</li> </ul>   |

| Field                           | Available Options  |
|---------------------------------|--|
| <p><b>Start Date Values</b></p> | <p>Select a date from the date picker or map the eligibility start date values by selecting the <b>Date Format</b> that matches the values contained in the eligibility file.</p> <p>Eligibility files where the Start and/or End Date is not mapped (selected as the SAME for all students) will not be available for selection as a <b>Scheduled Import</b>. Only imports where both the Start and End Date are mapped on the file can be scheduled.</p> <p>Options include the following:</p> <ul style="list-style-type: none"> <li>• MMDDYY or MMDDYYYY</li> <li>• MM-DD-YY or MM-DD-YYYY</li> <li>• MM/DD/YY or MM/DD/YYYY</li> <li>• DDMMYY or DDMMYYYY</li> <li>• DD-MM-YY or DD-MM-YYYY</li> <li>• DD/MM/YY or DD/MM/YYYY</li> <li>• YMMDD or YYYYMMDD</li> <li>• YY-MM-DD or YYYY-MM-DD</li> <li>• YY/MM/DD or YYYY/MM/DD</li> </ul> |
| <p><b>End Date Values</b></p>   | <p>Select a date from the date picker or map the eligibility end date values by selecting the <b>Date Format</b> that matches the values contained in the eligibility file.</p> <p>Eligibility files where the Start and/or End Date is not mapped (selected as the SAME for all students) will not be available for selection as a <b>Scheduled Import</b>. Only imports where both the Start and End Date are mapped on the file can be scheduled.</p> <p>Options include the following:</p> <ul style="list-style-type: none"> <li>• MMDDYY or MMDDYYYY</li> <li>• MM-DD-YY or MM-DD-YYYY</li> <li>• MM/DD/YY or MM/DD/YYYY</li> <li>• DDMMYY or DDMMYYYY</li> <li>• DD-MM-YY or DD-MM-YYYY</li> <li>• DD/MM/YY or DD/MM/YYYY</li> <li>• YMMDD or YYYYMMDD</li> <li>• YY-MM-DD or YYYY-MM-DD</li> <li>• YY/MM/DD or YYYY/MM/DD</li> </ul>   |

| Field   | Available Options  |
|---|--|
| <b>Medicaid Opt Out</b><br><b>SCHIP Opt Out</b> | <p>Values reflecting a household's preferences on receiving additional assistance from Medicaid/SCHIP organizations should be mapped to the following <b>Medicaid/SCHIP Opt Out</b> values: Yes or No.</p> <p>These values will appear if the Display Medicaid Opt Out and/or Display SCHIP Opt Out checkboxes are marked in the <a href="#">FRAM Preferences</a>.</p> |

### Mapping Additional State Codes

Some states have additional state codes that can be mapped and imported. Currently these state codes are available in the import wizard:

| State      | Code                 | Definition  |
|------------|----------------------|---|
| <b>BIE</b> | Does Not Participate | A student's eligibility for meal benefits has been determined but he/she chooses not to eat school meals. |
| <b>NE</b>  | Free Milk Eligible   | Student is eligible for free milk based on the state-specific definition of Free Milk Eligible.           |
| <b>NH</b>  | Free Milk Eligible   | Student is eligible for free milk based on the state-specific definition of Free Milk Eligible.           |

### Step 6. Confirmation Review

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

**Eligibility Import Wizard**

| Name                 | File Location  | Format                 | Column Count | Row Count |
|----------------------|--|------------------------|--------------|-----------|
| 12-13<br>Campus Elig | C:\CampusDocumentStore\ieBatchAppShare\batchQueue\iefiles\2\2012-12-11-13-18-28<br>VCsv 12-13 Campus Eligibilities.csv | Comma Separated Values | 12           | 39        |

| 1                | 2                 | 3                 | 4                     |
|------------------|-------------------|-------------------|-----------------------|
| student.lastName | student.firstName | student.birthdate | student.studentNumber |
| SMITH            | STACY             | 2/20/1997         | 1952461               |
| SMITH            | AMBER             | 4/14/1998         | 194341                |

| Eligibility | StartDate  | MedicaidOptOut | SCHIPOptOut | DirectType |
|-------------|------------|----------------|-------------|------------|
| Free        | 09/01/2012 | Yes            | Yes         | SNAI       |
| Free        | 09/01/2012 | Yes            | Yes         | SNAI       |
| Free        | 09/01/2012 | Yes            | Yes         | SNAI       |

**Step 6. Confirmation Review.** Verify the criteria for accuracy. To make changes, select "Previous" to return to the appropriate screen.

This mapping will be used to match the data in the import file to student identifiers existing in the database.

| Name          | Seq | Map to Data Field     | Strip Leading Zeros |
|---------------|-----|-----------------------|---------------------|
| StudentNumber | 4   | student.studentNumber | Yes                 |

This mapping will import a unique value for each student in the file.

| Import Data Field | Seq in Data File |
|-------------------|------------------|
| DirectType        | 8                |
| Eligibility       | 9                |
| MedicaidOptOut    | 10               |
| SCHIPOptOut       | 11               |
| StartDate         | 12               |

Values entered for fields shown will be the same for all students when imported.

| Data Field      | Set Value  |
|-----------------|------------|
| EndDate         | 10/16/2013 |
| EligibilityType | Meal       |

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

Previous Test Import Batch Test

## Field Descriptions

| Field   | Description   |
|---|---|
| <b>Include Updated Records Detail on Report</b> | Mark this checkbox to display names and details of students affected by the import on the <a href="#">Eligibility Import Report</a> .   |
| <b>Report Format</b>                            | The <a href="#">Eligibility Import Report</a> can be generated as a PDF or Comma Separated Values (CSV) file. Large files, 15,000 records or more, must use the CSV option.               |
| <b>Batch Import Options</b>                     | This option is only available if the <a href="#">Batch Queue</a> tool is enabled. These radio buttons determine whether the <b>Batch Test</b> or the <b>Batch Import</b> button displays. |



## Testing and Importing the File

Reminder, 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.

Follow the procedures for one of the following options.

| Option | Description   |
|--------|---|
| 1      | <a href="#">Test and Import a Standard File</a><br>This option is best for average files (less than 3,000 rows).  |
| 2      | <a href="#">Batch Test and Import Large Files</a><br>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 <a href="#">Batch Queue</a> and <a href="#">Scheduled Import</a> tool. If you do not have <a href="#">Batch Queue</a> enabled on your Campus site, you can contact Campus Support and request the <a href="#">Batch Queue</a> 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 eligibility file will be imported to the database.

Adjust the data file contents and/or mappings if necessary. The import mapping is automatically saved and may be imported at a later time. If a student appears multiple times on the eligibility file, the student will appear multiple times on the [Eligibility Import Report](#).

2. Click the **Import** button.
3. 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 eligibility file will be imported to the database.

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

Previous Test Import **Batch Test**

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 | 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  |
|----------------------|--|
| <b>High Priority</b> | <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 <b>R</b> rights to the the Set Task Priority sub-right located in the <a href="#">Tool Rights</a> index under Ad Hoc Reporting &gt; Batch Queue).</p> |

| Field                      | Description   |
|----------------------------|---|
| <b>Keep Until I Delete</b> | <p>Mark this checkbox if the completed report results should continue to appear on the <a href="#">Batch Queue</a> and <a href="#">Admin Queue</a> tools until manually deleted by a user. If this checkbox is not marked, the completed report will be cleared from the <a href="#">Batch Queue</a> and <a href="#">Admin Queue</a> tools based on the frequency for the Batch Queue Maintenance task set within the <a href="#">Task Scheduler</a>.</p> <div style="border: 1px solid green; padding: 5px; margin-top: 10px;"> <p>This checkbox can only be marked if a user has the proper tool right access (<i>i.e.</i>, at least <b>R</b> rights to the the Set Task Expiration sub-right located in the <a href="#">Tool Rights</a> index under Ad Hoc Reporting &gt; Batch Queue).</p> </div> |
| <b>Start Date/Time</b>     | Indicate the date and time at which the <a href="#">Batch Queue</a> should begin to generate the report.  |

4. Click the **OK** button.

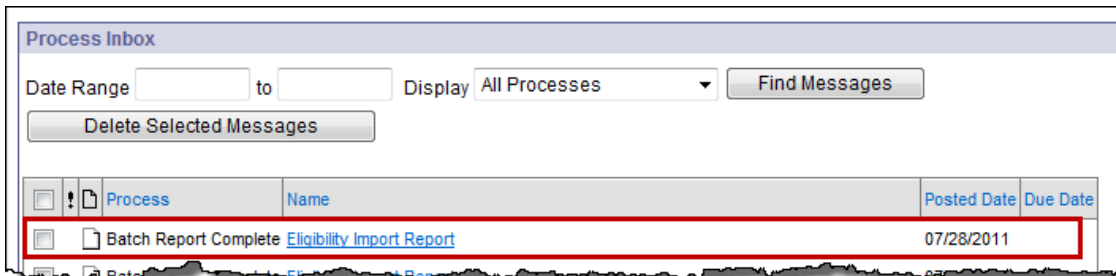
**Result**

The Success window displays.

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

**Result**

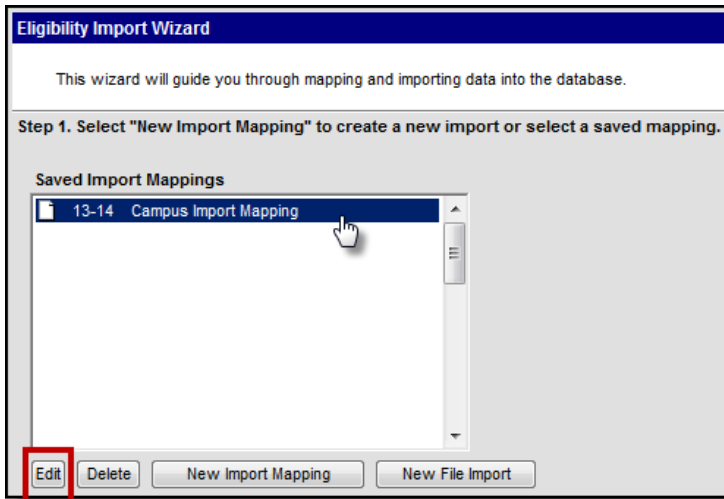
The report will wait for the date and time scheduled for generation. Upon completion, the [Eligibility Import Report](#) will be available in the [Process Alerts \(formerly Process Inbox\)](#) for your review.



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

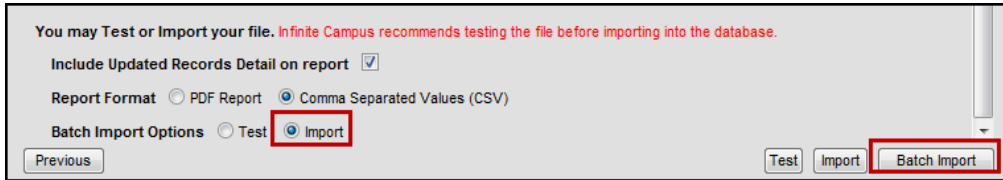
6. Return to Step 1 of the wizard and select your Saved Import Mapping.

**Example**



7. Click the **Edit** button.
8. Adjust the data file contents and/or mappings if necessary and continue to Step 5 of the wizard.
9. Select the **Import** option in the **Batch Import Options** field.

**Example**



10. Click the **Batch Import** button.

**Result**

The Batch Queue Reporting Options window displays.

11. 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 criteria for any import in Pending status in the [Batch Queue](#).

## Import a Direct Certification File

▶ [Click here to expand...](#)

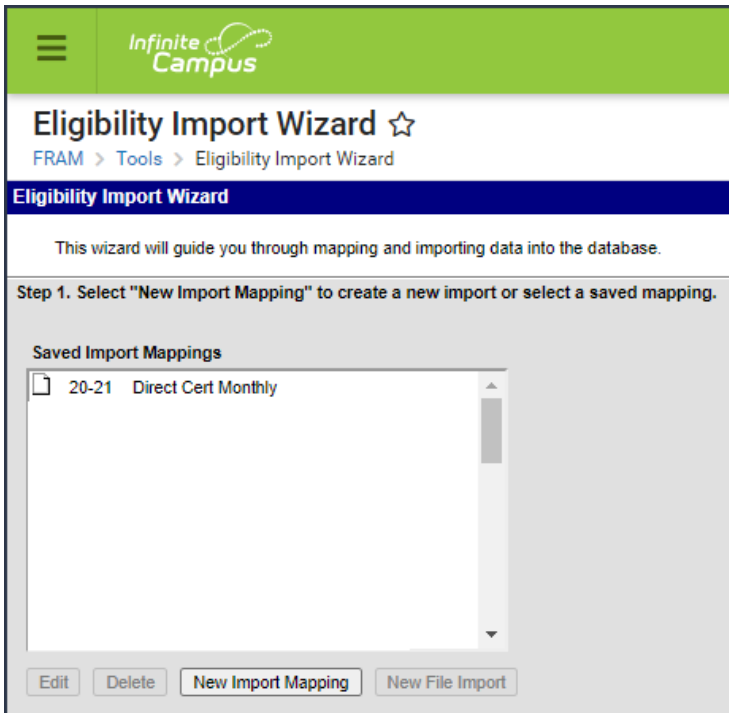
[Important Information about this Tool](#) | [Import File Requirements](#) | [Eligibility Import Report Example](#) | [Import a 3rd Party Eligibility File](#) | [Import a Direct Certification File](#)

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.

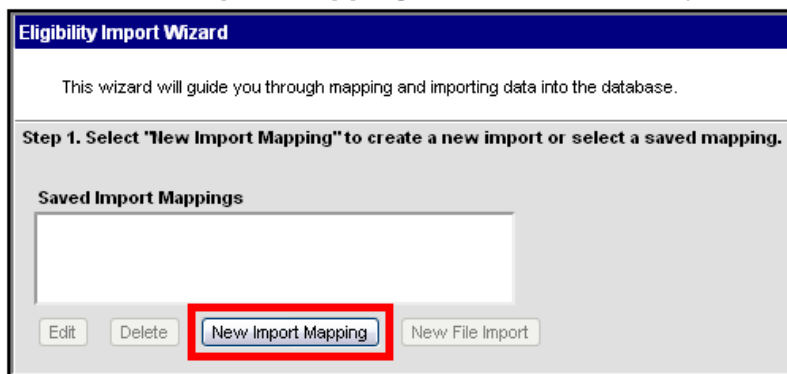
If you are importing an eligibility file from a 3rd party system, see the [Importing a 3rd Party Eligibility File](#) article.



## 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.



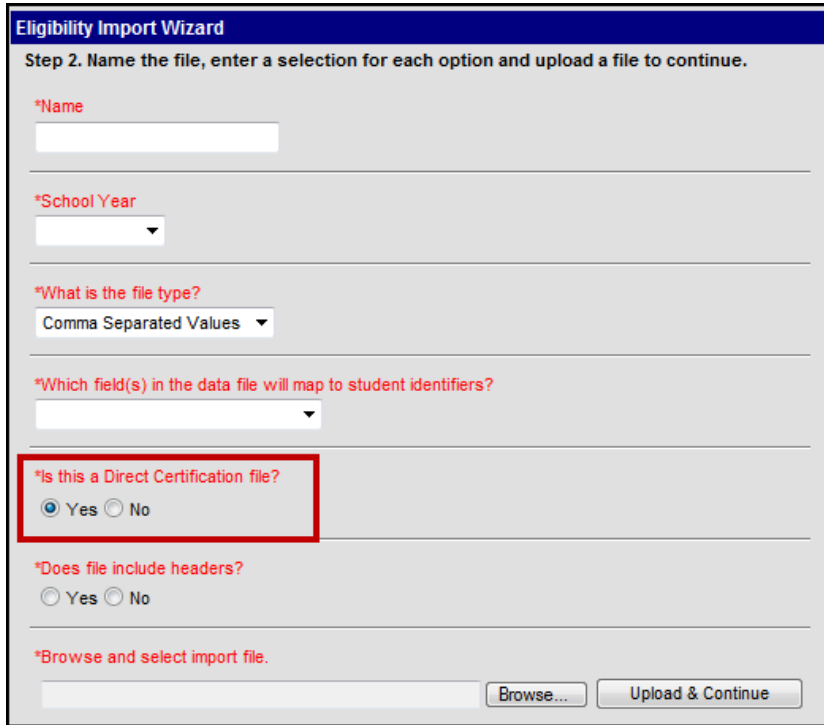
### Result

Step 2 of the Wizard displays.

2. 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.



**Eligibility Import Wizard**  
 Step 2. Name the file, enter a selection for each option and upload a file to continue.

\*Name

\*School Year

\*What is the file type?

\*Which field(s) in the data file will map to student identifiers?

\*Is this a Direct Certification file?  
 Yes  No

\*Does file include headers?  
 Yes  No

\*Browse and select import file.

1. Enter a **Name** for the new import. This name should represent the type of data the file contains.
2. Select the **School Year** for which data is being imported.
3. Select the format of the import file from the **File Type** field. The acceptable file formats are:
  - Fixed Width
  - Comma Separated Values
  - TAB Delimited
4. 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 |           |            |             |           |            |      | Mapped Data Field(s) |
|---------------|-----------|------------|-------------|-----------|------------|------|----------------------|
| 1             | 2         | 3          | 4           | 5         | 6          | 7    | Student Number       |
| Student #     | Last Name | First Name | Eligibility | Cert Type | Start Date | End  | 20595945             |
| 2055945       | Addison   | Don        | Free        | Income    | 9/1/2010   | 9/20 | 23831988             |
| 23831988      | Adler     | Justin     | Paid        | Foster    | 9/6/2010   | 9/20 | 23443894             |
| 23443894      | Afnn      | Trin       | Reduced     | Income    | 10/1/2010  | 9/20 | 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          | 6        |
|-----------|------------------|-----------------|----------------|------------|----------|
| Unique ID | Eligibility Type | EligibilityType | Certified Type | Start Date | End Date |
| 12345     | Free             | Medicaid        | Direct         | 9/1/2017   | 6/1/2018 |
| 23456     | Free             | SNAP            | Direct         | 9/1/2017   | 6/1/2018 |

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? "

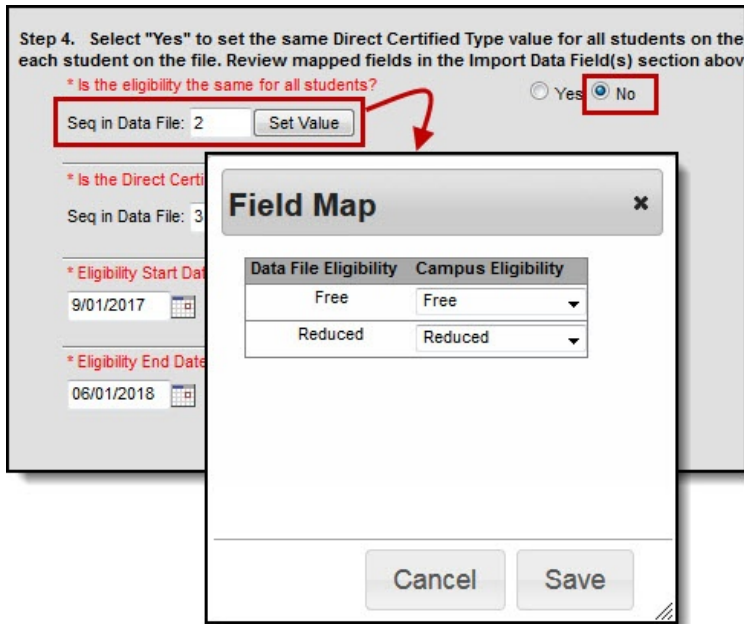
- Select **Yes** to set the same eligibility value for all students on the file.

\* Is the eligibility the same for all students?  Yes  No

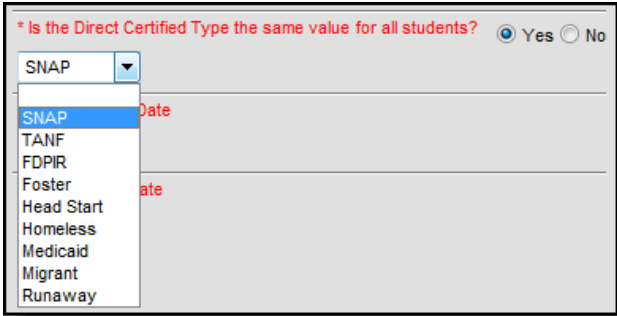
Free

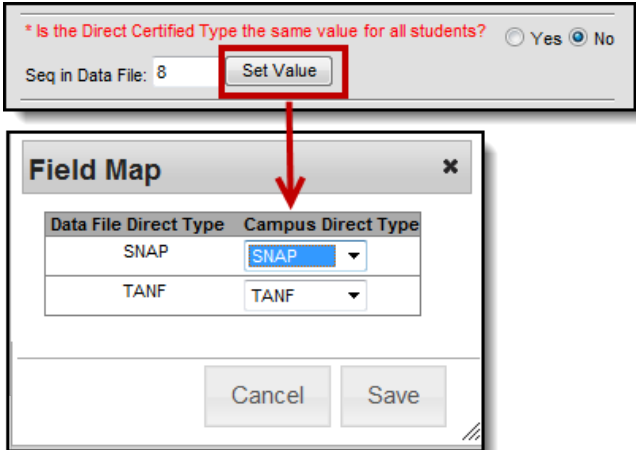
- Free
- Reduced
- Paid
- Non-reimbursable

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



2. 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          | select the type from the dropdown list.  |

| 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 <b>Set Value</b> button. The Field Map window displays. Map the value from the file to a value in Campus by selecting an option from the <b>Campus Direct Type</b> 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.

**Eligibility Import Wizard**

| Name                 | File Location   | Format                 | Column Count | Row Count |
|----------------------|---|------------------------|--------------|-----------|
| 12-13<br>Campus Elig | C:\CampusDocumentStore\ieBatchAppShare\batchQueue\iefs\2\2012-12-11-10-34-06<br>VCsv 12-13 Campus Eligibilities.csv | Comma Separated Values | 11           | 39        |

**Raw Data File**

| 1                | 2                 | 3                 | 4                     |
|------------------|-------------------|-------------------|-----------------------|
| student.lastName | student.firstName | student.birthdate | student.studentNumber |
| SMITH            | STACY             | 2/20/1997         | 195246                |
| SMITH            | AMBER             | 4/14/1998         | 194341                |

**Import Data Field(s)**

| DirectType |
|------------|
| SNAP       |
| SNAP       |
| SNAP       |
| SNAP       |

**Step 5. Confirmation Review. Verify the criteria for accuracy. To make changes, select "Previous" to return to the appropriate screen.**

This mapping will be used to match the data in the import file to student identifiers existing in the database.

| Name          | Seq | Map to Data Field     | Strip Leading Zeros |
|---------------|-----|-----------------------|---------------------|
| StudentNumber | 4   | student.studentNumber | Yes                 |

This mapping will import a unique value for each student in the file.

| Import Data Field | Seq in Data File |
|-------------------|------------------|
| DirectType        | 8                |

Values entered for fields shown will be the same for all students when imported.

| Eligibility | StartDate  | EndDate    |
|-------------|------------|------------|
| Free        | 09/01/2012 | 10/16/2013 |

Mark the "Exclude Applications" checkbox to exclude applications from the Verification process. This can be used for applications that were approved prior to receiving the Direct Certification file.

Exclude Applications

Mark the "Extend Direct Certification Status to Additional Students in Household" checkbox to add a Free eligibility for SNAP, TANF or FDIPIR Direct Certified types to students in the same household who are not included in the Direct Certification file. In FRAM Preferences an option is also available to extend the Medicaid Direct Certified Type.

Note: If another household has the same address as a student on the Direct Certification file, students in the other household will also receive Direct Certification Eligibility. Test the import file to view the list of additional students who will be extended eligibility before importing into the database.

Extend Direct Certification Status to Additional Students in Household

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

Buttons: Previous, Test, Import, Batch Test

These areas only display if the Direct Certified Type is NOT the same value for all students.

These options are only available if the Batch Queue tool is enabled.

## Field Descriptions

| Field | Description |
|-------|-------------|
|-------|-------------|

| Field                              | Description   |
|------------------------------------|---|
| <p><b>Exclude Applications</b></p> | <p>If a household application associated with a student import file should be excluded, mark the <b>Exclude Applications</b> 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 <a href="#">Verification</a> 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 <a href="#">Verification</a>. If the <b>Exclude Applications</b> checkbox is used, these applications will be excluded and will not be included in <a href="#">Verification</a>. If the <b>Exclude Applications</b> checkbox is not used, these applications may be included in <a href="#">Verification</a> 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 <a href="#">Eligibility Import Report</a> under the section <b>Excluded</b>.</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 <a href="#">Eligibility Import Report</a> under the section <b>Not Excluded</b> with a reference in the <b>Action</b> 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 <a href="#">Eligibility Import Report</a> under the section <b>Not Excluded</b>. This gives users the option to review these applications for possible manual exclusion.</p> |

| Field   | Description   |
|---|---|
| <b>Extend Direct Certification Status to Additional Students in Household</b> | <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 <b>Extend Direct Certification Status to Additional Students in Household</b> 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 <a href="#">FRAM Preference</a> option is set, users may also extend the Medicaid Direct Certified Type.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px; background-color: #f9f9f9;"> <p><b>Districts Importing Direct Certification files for Medicaid :</b> 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 <b>NOT included in the Direct Certification file</b></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> |
| <b>Include Updated Records Detail on Report</b>                               | <p>Mark this checkbox to display names and details of students affected by the import on the Eligibility Import Report.</p>   |
| <b>Report Format</b>  | <p>The <a href="#">Eligibility Import Report</a> can be generated as a PDF or Comma Separated Values (CSV) file. Large files, 15,000 records or more, must use the CSV option.</p>  |
| <b>Batch Import Options</b>   | <p>This option is only available if the <a href="#">Batch Queue</a> tool is enabled. These radio buttons determine whether the <b>Batch Test</b> or the <b>Batch Import</b> button displays.</p>  |

## 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 | MEDICAID |
| 3 | 39879          | SMITH | ADAM  | DIRECT | FOSTER   |
| 4 | 39879          | SMITH | ADAM  | DIRECT | TANF     |
| 5 | 39879          | SMITH | ADAM  | DIRECT | FOSTER   |

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      | <b>Test and Import a Standard File</b><br>This option is best for average files (less than 3,000 rows).  |
| 2      | <b>Batch Test and Import Large Files</b><br>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 <a href="#">Batch Queue</a> and <a href="#">Scheduled Import</a> tool. If you do not have <a href="#">Batch Queue</a> enabled on your Campus site, you can contact Campus Support and request the <a href="#">Batch Queue</a> 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.

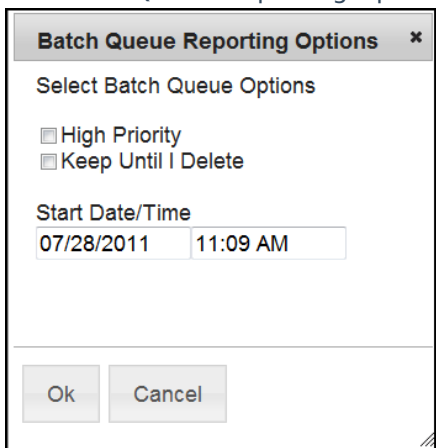
## Option 2-Batch Test and Import Large Files

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.



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



| Field                      | Description   |
|----------------------------|---|
| <b>High Priority</b>       | <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> <div data-bbox="456 483 1240 685" style="background-color: #e1f5fe; padding: 10px; border: 1px solid #ccc;"> <p>This checkbox can only be marked if a user has the proper tool right access (<i>i.e.</i>, at least <b>R</b> rights to the Set Task Priority sub-right located in the <a href="#">Tool Rights</a> index under Ad Hoc Reporting &gt; Batch Queue).</p> </div>  |
| <b>Keep Until I Delete</b> | <p>Mark this checkbox if the completed report results should continue to appear on the <a href="#">Batch Queue</a> and <a href="#">Admin Queue</a> tools until manually deleted by a user. If this checkbox is not marked, the completed report will be cleared from the <a href="#">Batch Queue</a> and <a href="#">Admin Queue</a> tools based on the frequency for the Batch Queue Maintenance task set within the <a href="#">Task Scheduler</a>.</p> <div data-bbox="456 1043 1240 1245" style="background-color: #e1f5fe; padding: 10px; border: 1px solid #ccc;"> <p>This checkbox can only be marked if a user has the proper tool right access (<i>i.e.</i>, at least <b>R</b> rights to the Set Task Expiration sub-right located in the <a href="#">Tool Rights</a> index under Ad Hoc Reporting &gt; Batch Queue).</p> </div> |
| <b>Start Date/Time</b>     | <p>Indicate the date and time at which the <a href="#">Batch Queue</a> should begin to generate the report.</p>   |

4. Click the **OK** button.

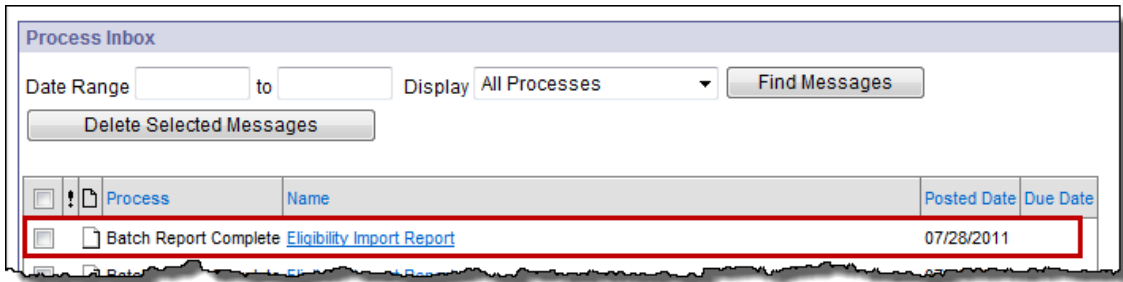
**Result**

The Success window displays.

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

**Result**

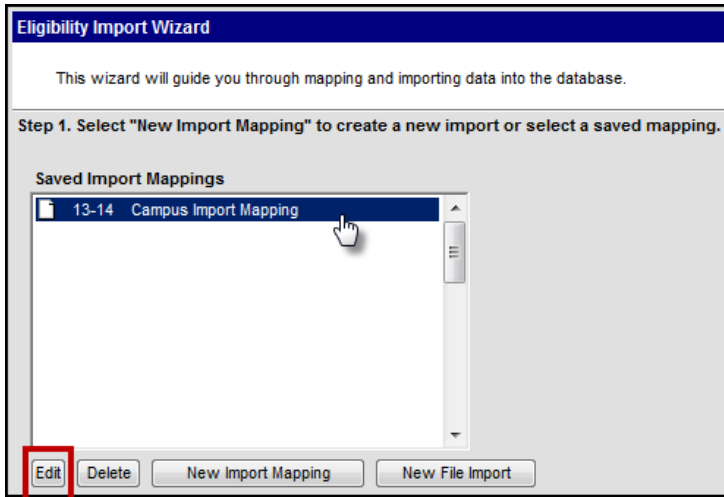
The report will wait for the date and time scheduled for generation. Upon completion, the [Eligibility Import Report](#) is available in the [Process Alerts \(formerly Process Inbox\)](#) for your review.



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

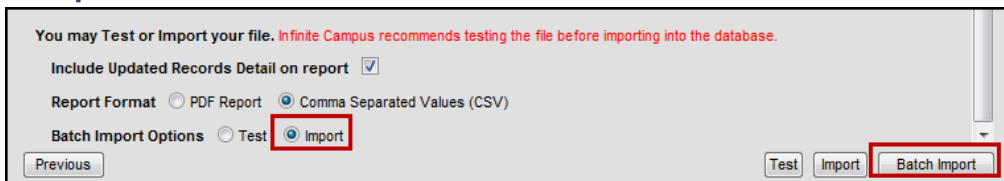
- Return to Step 1 of the wizard and select your Saved Import Mapping.

**Example**



- 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**



- 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](#).

