Eligibility Import Wizard

Last Modified on 10/08/2025 3:49 pm CDT

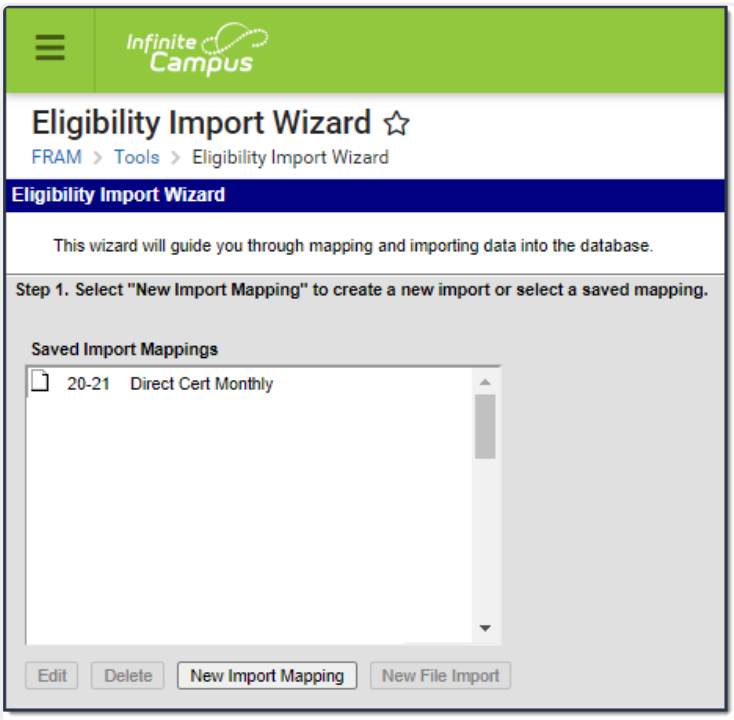
Important Information about this Tool | Import File Requirements | Eligibility Import Report Example | Import a 3rd Party Eligibility File | Import a Direct Certification File

Tool Search: Eligibility Import Wizard

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
Import a 3rd Party Eligibility File Import a Direct Certification File	Important Information about this Tool Import File Requirements Eligibility Import Report Example



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.

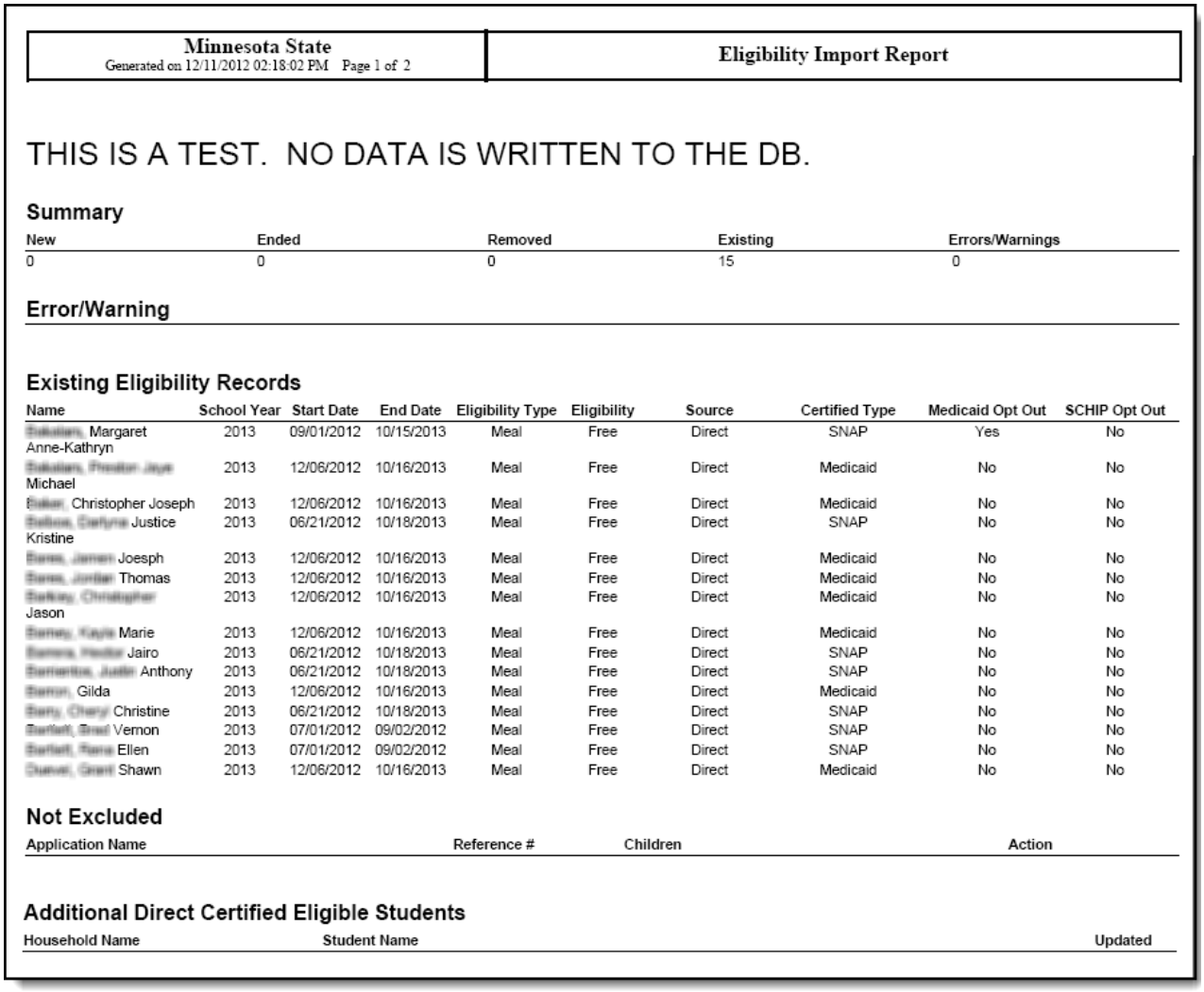
3rd Party Eligibility File Requirements

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.



Minnesota State
Generated on 12/11/2012 02:18:02 PM Page 1 of 2

Eligibility Import Report

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
[redacted] Margaret Anne-Kathryn	2013	09/01/2012	10/15/2013	Meal	Free	Direct	SNAP	Yes	No
[redacted] Michael	2013	12/06/2012	10/16/2013	Meal	Free	Direct	Medicaid	No	No
[redacted] Christopher Joseph	2013	12/06/2012	10/16/2013	Meal	Free	Direct	Medicaid	No	No
[redacted] Kristine	2013	06/21/2012	10/18/2013	Meal	Free	Direct	SNAP	No	No
[redacted] Joesph	2013	12/06/2012	10/16/2013	Meal	Free	Direct	Medicaid	No	No
[redacted] Thomas	2013	12/06/2012	10/16/2013	Meal	Free	Direct	Medicaid	No	No
[redacted] Jason	2013	12/06/2012	10/16/2013	Meal	Free	Direct	Medicaid	No	No
[redacted] Marie	2013	12/06/2012	10/16/2013	Meal	Free	Direct	Medicaid	No	No
[redacted] Jairo	2013	06/21/2012	10/18/2013	Meal	Free	Direct	SNAP	No	No
[redacted] Anthony	2013	06/21/2012	10/18/2013	Meal	Free	Direct	SNAP	No	No
[redacted] Gilda	2013	12/06/2012	10/16/2013	Meal	Free	Direct	Medicaid	No	No
[redacted] Christine	2013	06/21/2012	10/18/2013	Meal	Free	Direct	SNAP	No	No
[redacted] Vernon	2013	07/01/2012	09/02/2012	Meal	Free	Direct	SNAP	No	No
[redacted] Ellen	2013	07/01/2012	09/02/2012	Meal	Free	Direct	SNAP	No	No
[redacted] 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
Summary	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.
Error/Warning	This section indicates anticipated problems with the import, such as non-matching student identifiers / unique IDs (*e.g.,* last name, first name, birth date, state ID, student number), missing data, incorrect file lengths, etc.

Report Section	Description
Updated Records	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 FRAM Eligibility Standards and Guidelines article for more information.– The following types of updated records are available: • ***New*** - 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. • ***New / Ended*** - 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.) • ***New / Removed*** - 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.) • ***Postponed*** - Campus assigns this status when there is an eligibility record that has a start date postponed to a later date.
Existing Eligibility Records	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 FRAM Eligibility Standards and Guidelines for more information.

Report Section	Description
Not Excluded	This section indicates which applications of students with Direct Certification eligibilities will not be excluded from the Verification process (even though the "Exclude Applications" checkbox was flagged in *Step 5. Test and Import*). An application may not be excluded for one of the following reasons: • 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. • 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.
Excluded	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 Verification process.
Additional Direct Certified Eligible Students	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.

Import a 3rd Party Eligibility File

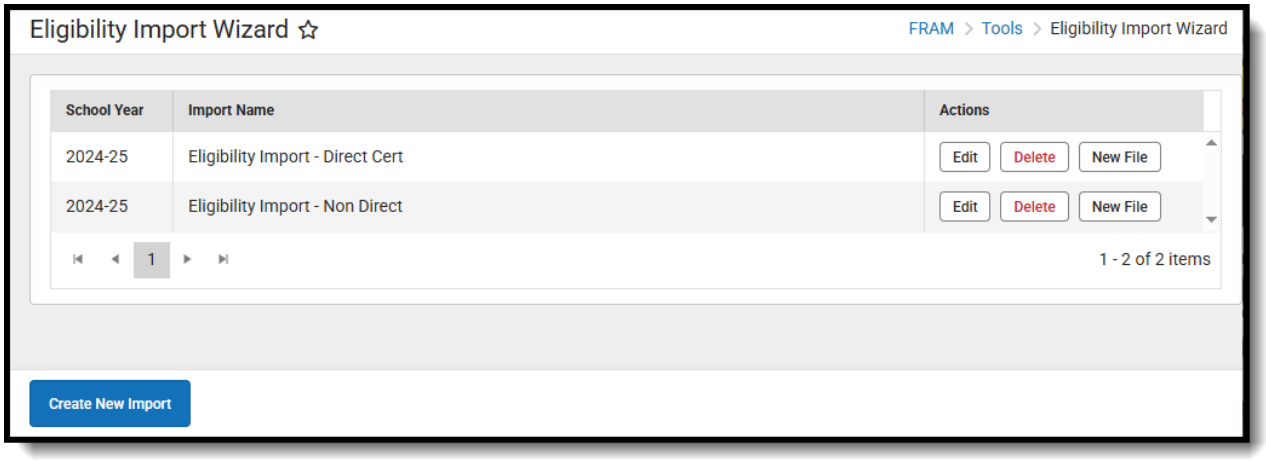
▸ Click here to expand...

Tool Search: Eligibility Import Wizard

When using the Eligibility Import Wizard, map each column to a single Campus value rather than mapping one column to multiple Campus values. This ensures data accuracy and prevents import errors.

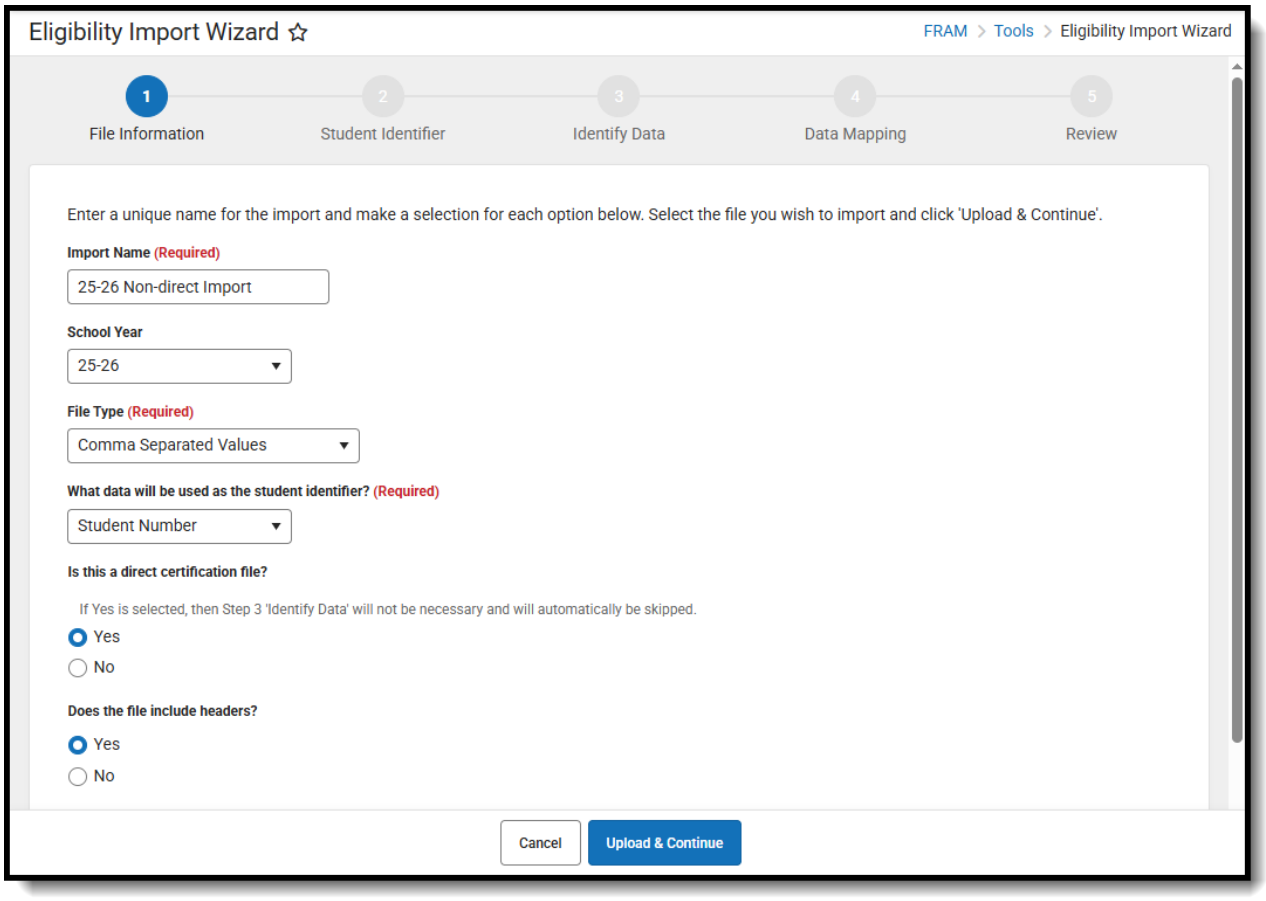
The procedures described here allow you to import eligibility from a 3rd party system that may have a combination of non-direct and direct certification eligibility.

If you are importing a direct certification file, see the Importing a Direct Certification File article.



Click **Create New Import** to initiate the import process and establish a mapping between the data file and the appropriate location in the Campus database where the data values will be stored.

Step 1. File Information



1. Enter an **Import 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:
    - Comma Separated Values

- Fixed Width
- 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. 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.

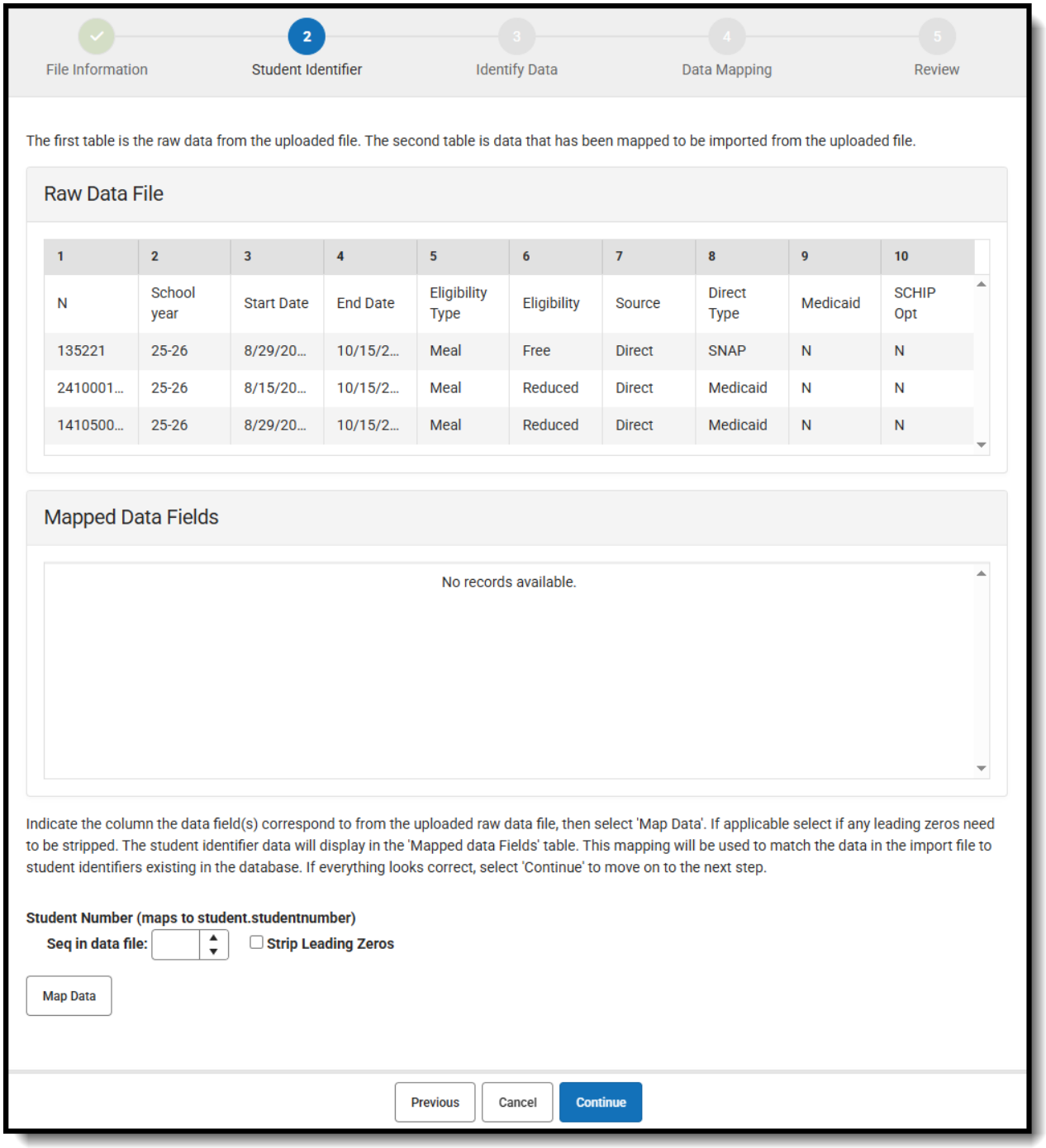
6. Indicate whether the first row of the import file contains headers (identifying the content of each data column) by selecting Yes or No under the question **Does the file include headers?**

   The wizard does NOT import values from the header row.

7. Click **Select files...** to select the data file to be imported and click the **Open** button to return to the import wizard screen.

8. Click **Upload & Continue** to save and move to the Student Identifier step.

Step 2. Student Identifiers



Step 2 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).

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

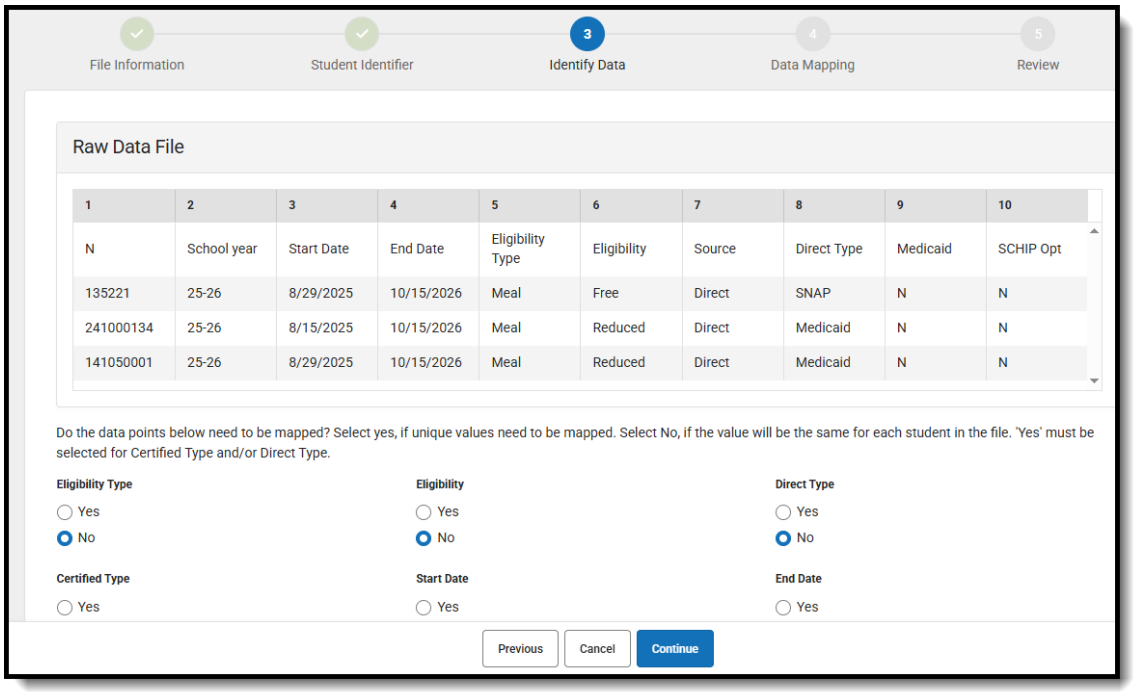
   Fixed-width Files Only

   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 checkboxes **Strip Leading Zeros** if the student identifier values of the data file start with zero(s) that should be removed before importing.
3. Click **Map Data** to save the mapping of student-identifying data from the import file to the Campus database. The student identifier selected in the 'Which field(s) in the data file will map to student identifiers?' field of the previous step is displayed and must be mapped first.
4. Click **Continue**.

Step 3. Identify Data

Step 3 of the wizard allows you to identify the fields you want to import from the eligibility file to the Campus database.



1. Select **Yes** or **No** for all of the options.
   - Select **Yes** for 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
Certified Type	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.
Direct Type	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.

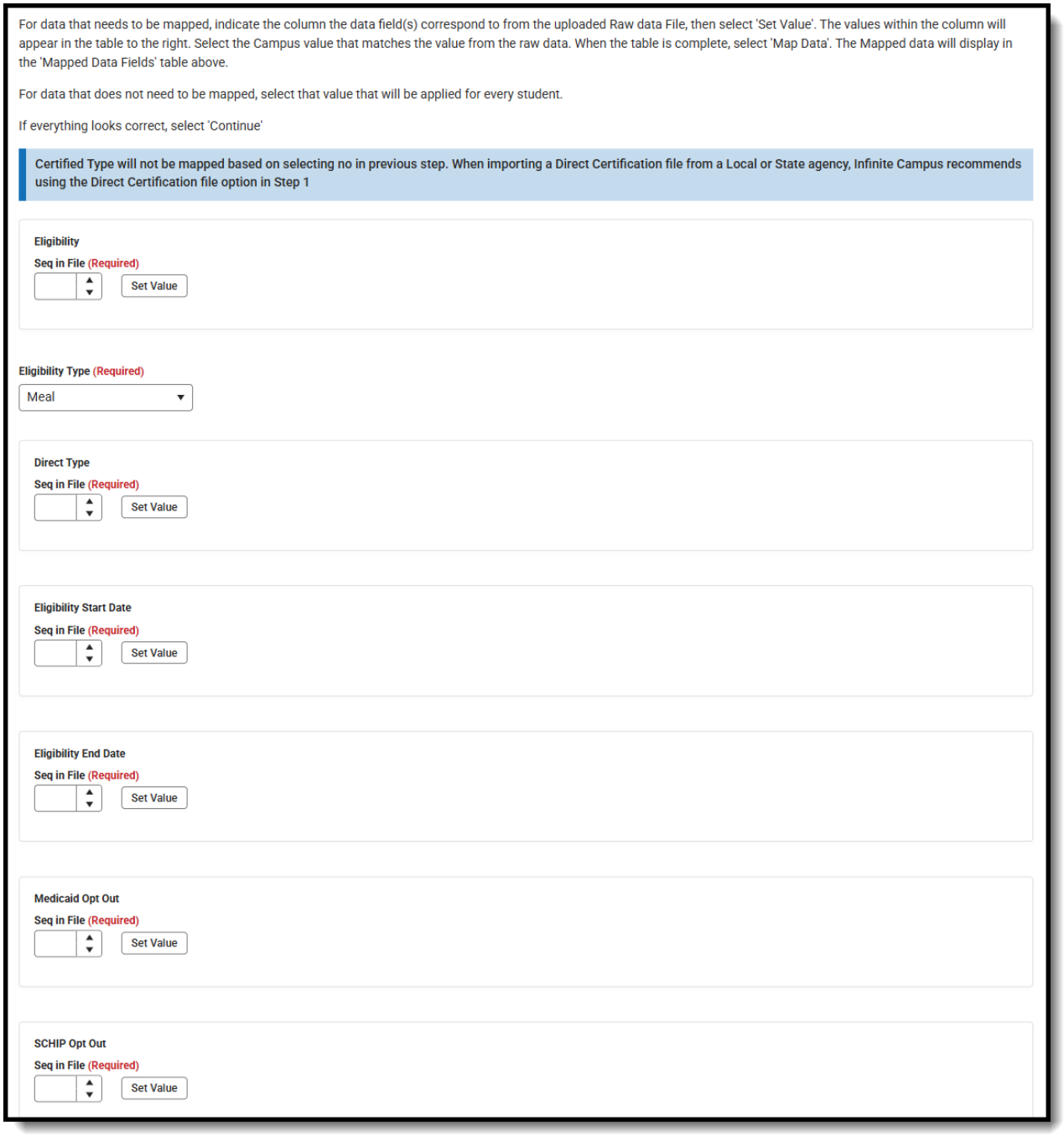
- Select **No** if you are not importing a value from the file. If you select No, you will be able to select a value for the field in Step 4 of the wizard. Selecting No also indicates that the value for that field is the same for every student. For example, select No for the Eligibility field if every student's Eligibility Status is SES.

2. Click **Next** to continue.

Step 4. Data Mapping

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 **Continue** button to proceed to review and import the data.



Display Medicaid Opt Out and/or Display SCHIP Opt Out only appear if their checkboxes are marked in FRAM Preferences.

If you are...	Then...

If you are...	Then...
importing values contained in the eligibility file.	complete the following steps. 1. Enter the column number of the Raw Data File that contains the values you want to import. 2. Click **Set Value**. 3. Map the data file's values to the database by selecting options from the Campus fields. 4. Click **Map Data**.
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
Eligibility Type	• Meal • SES
Eligibility	• Free • Reduced • Paid • Non-Reimbursable
Certified Type	• Direct • Income • Categorical • Override • Runaway • Homeless • Foster • Migrant • Head Start • RCCI • Early Childhood • Medicaid • Declined • Denied • Did Not Apply • Socioeconomic Status

Field	Available Options
Direct Type	• SNAP • TANF • FDPIR • Foster • Head Start • Homeless • Medicaid • Migrant • Runaway
Start Date Values	Select a date from the date picker or map the eligibility start date values by selecting the **Date Format** that matches the values contained in the eligibility file. 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 Scheduled Import. Only imports where both the Start and End Date are mapped on the file can be scheduled. Options include the following: • MMDDYY or MMDDYYYY • MM-DD-YY or MM-DD-YYYY • MM/DD/YY or MM/DD/YYYY • DDMMYY or DDMMYYYY • DD-MM-YY or DD-MM-YYYY • DD/MM/YY or DD/MM/YYYY • YYMMDD or YYYYMMDD • YY-MM-DD or YYYY-MM-DD • YY/MM/DD or YYYY/MM/DD

Field	Available Options
End Date Values	Select a date from the date picker or map the eligibility end date values by selecting the **Date Format** that matches the values contained in the eligibility file. 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 Scheduled Import. Only imports where both the Start and End Date are mapped on the file can be scheduled. Options include the following: • MMDDYY or MMDDYYYY • MM-DD-YY or MM-DD-YYYY • MM/DD/YY or MM/DD/YYYY • DDMMYY or DDMMYYYY • DD-MM-YY or DD-MM-YYYY • DD/MM/YY or DD/MM/YYYY • YYMMDD or YYYYMMDD • YY-MM-DD or YYYY-MM-DD • YY/MM/DD or YYYY/MM/DD
Medicaid Opt Out **SCHIP Opt Out**	Values reflecting a household's preferences on receiving additional assistance from Medicaid/SCHIP organizations should be mapped to the following **Medicaid/SCHIP Opt Out** values: Yes or No. These values will appear if the Display Medicaid Opt Out and/or Display SCHIP Opt Out checkboxes are marked in the FRAM Preferences.

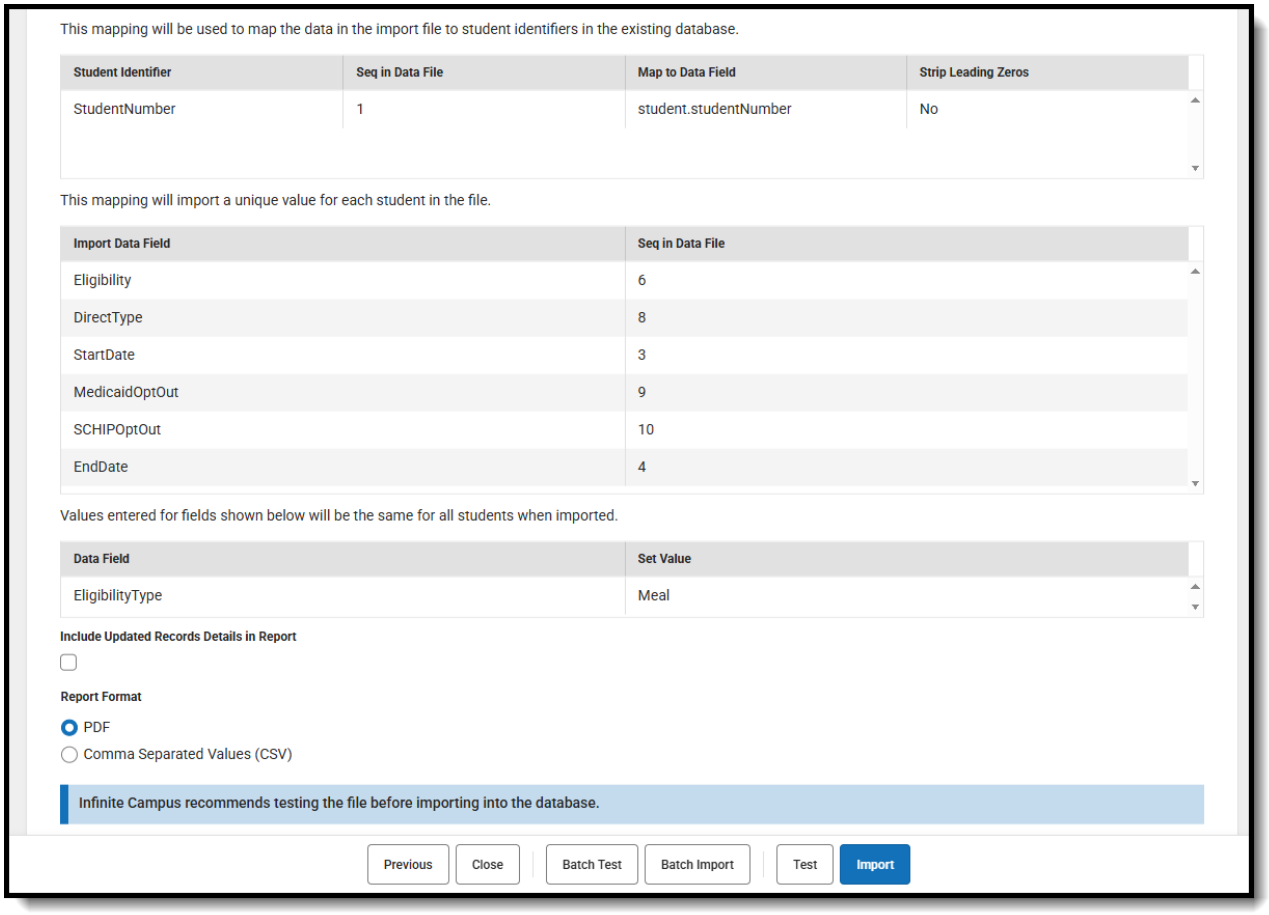
Mapping Additional State Codes

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

Step 5. Confirmation Review

After mapping and saving values from the import file, the import can be reviewed, tested, and finalized. Fields on this screen are displayed according to the previously selected options.



Field Descriptions

Field	Description
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.

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 **Import** on the pop-up window to confirm the import. 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. Click **Batch Test** to generate the Eligibility Import Report preview of how the values of the import file will be imported to the database. The Batch Queue Reporting Options window displays.

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

Field	Description
High Priority	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. This checkbox can only be marked if a user has the proper tool right access (*i.e.*, at least **R** rights to the Set Task Priority sub-right located in the Tool Rights index under Ad Hoc Reporting > Batch Queue).
Keep Until I Delete	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. This checkbox can only be marked if a user has the proper tool right access (*i.e.*, at least **R** rights to the Set Task Expiration sub-right located in the Tool Rights index under Ad Hoc Reporting > Batch Queue).
Start Date/Time	Indicate the date and time at which the Batch Queue should begin to generate the report.

3. Click **OK** to submit this report to the Batch Queue. While waiting for the Batch Test to complete, exit the Eligibility Import Wizard. 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.
4. Return to Step 1 of the wizard and click the **Edit** button.

5. Adjust the data file contents and/or mappings if necessary and continue to Step 5 of the wizard.
6. Click **Batch Import**. The Batch Queue Reporting Options window displays.
7. 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.

Import a Direct Certification File

▸ Click here to expand...

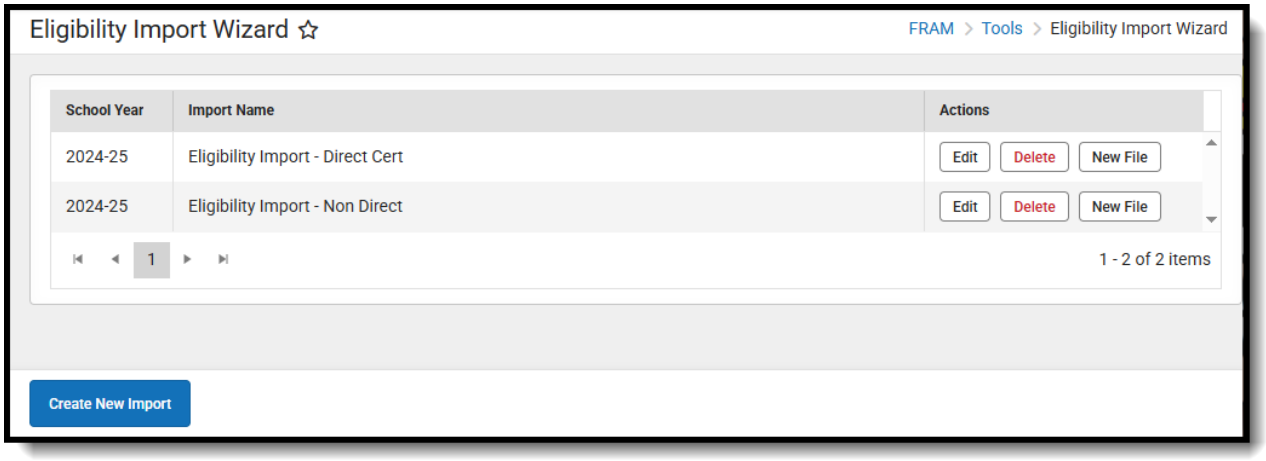
Tool Search: Eligibility Import Wizard

When using the Eligibility Import Wizard, map each column to a single Campus value rather than mapping one column to multiple Campus values. This ensures data accuracy and prevents import errors.

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

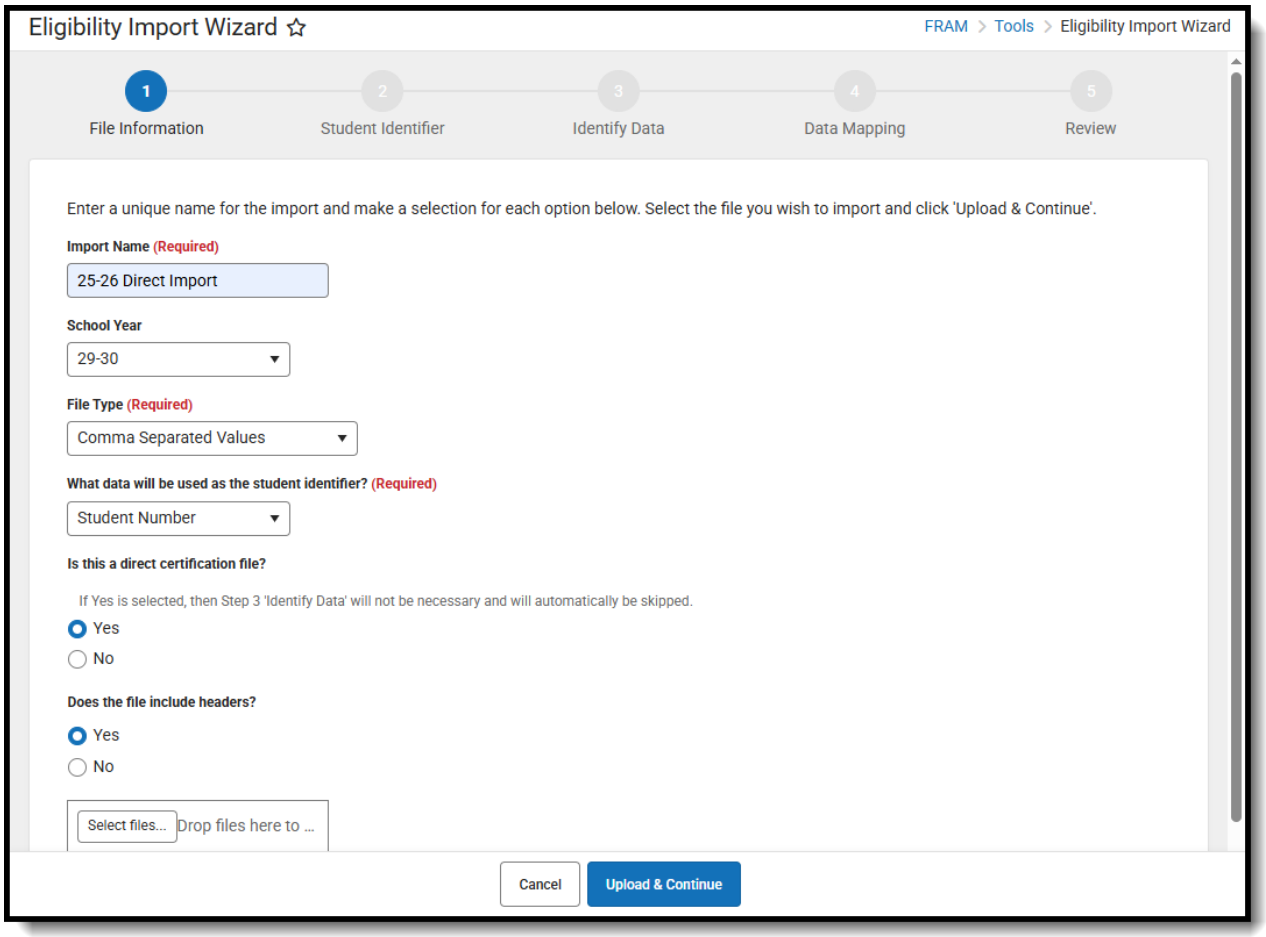
When using the Eligibility Import Wizard, please keep the following in mind if you are importing a Direct file in the current year. If the eligibility record in the file includes a record that is the same rank as the pre-existing record but is a different Certified Type, Campus updates the pre-existing 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.



Click **Create New Import** to initiate the import process and establish a mapping between the data file and the appropriate location in the Campus database where the data values will be stored.

Step 1. File Information



1. Enter an **Import 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:

- Comma Separated Values
- Fixed Width
- 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. Select **Yes** under the question **Is this a direct certification file?** to indicate that you are importing a direct certification file.

   If Yes is selected, then Step 3 'Identify Data' will not be necessary and will automatically be skipped.

   This option cannot be edited. If you need to switch this setting, please create a new import.

   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.

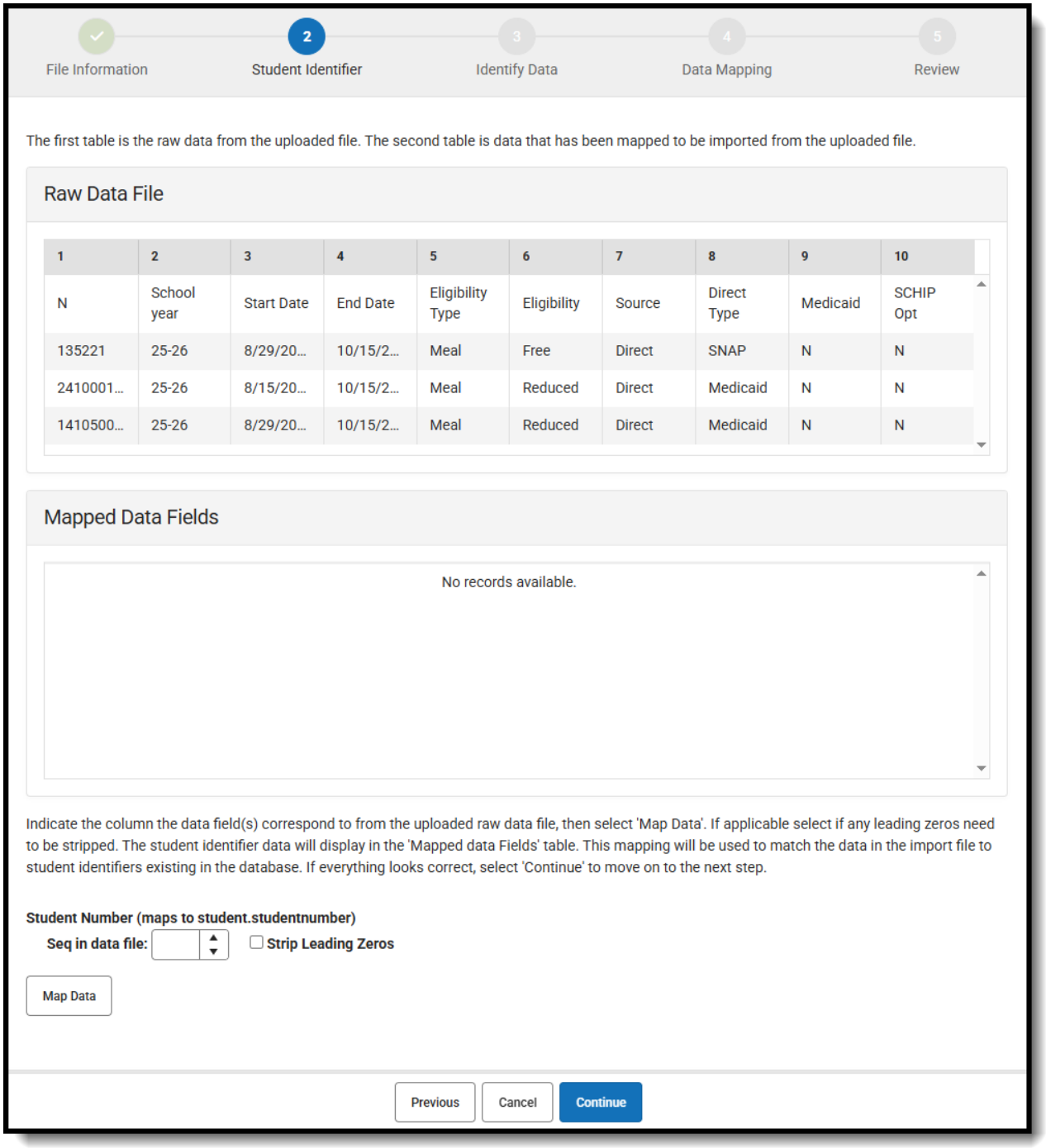
6. Indicate whether the first row of the import file contains headers (identifying the content of each data column) by selecting Yes or No under the question **Does the file include headers?**

   The wizard does NOT import values from the header row.

7. Click **Select files...** to select the data file to be imported and click the **Open** button to return to the import wizard screen.

8. Click **Upload & Continue** to save and move to the Student Identifier step.

Step 2. Student Identifiers



Step 2 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).

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

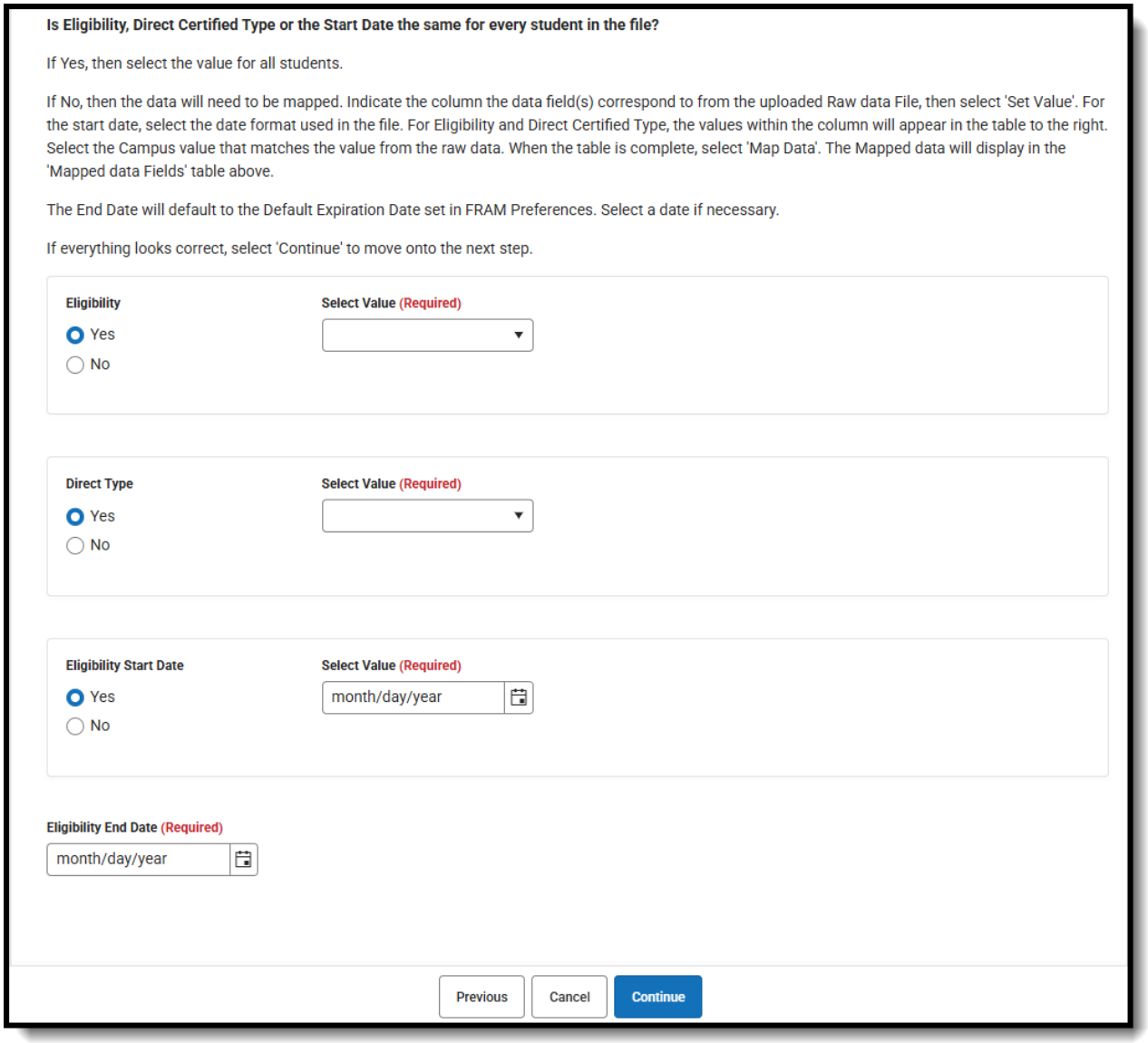
   Fixed-width Files Only

   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 checkboxes **Strip Leading Zeros** if the student identifier values of the data file start with zero(s) that should be removed before importing.
3. Click **Map Data** to save the mapping of student-identifying data from the import file to the Campus database. The student identifier selected in the 'Which field(s) in the data file will map to student identifiers?' field of the previous step is displayed and must be mapped first.
4. Click **Continue**.

Step 4. Data Mapping

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



Check if values are the same for all students and determine if Eligibility, Direct Certified Type, and Start Date are identical for every student in your file:

1. If values are the same for all students, select **Yes** for the appropriate value.
2. If values differ between students, select **No** and
    a. Map your data by indicating which columns in your Raw Data File correspond to each field.
    b. Click **Set Value**.
    c. For Eligibility and Direct Type, review the values from your **Raw Data File** table and select the matching Campus value.
    d. For Start Date, select the date format used in your file.
    e. When your mapping is complete, click **Map Data**.

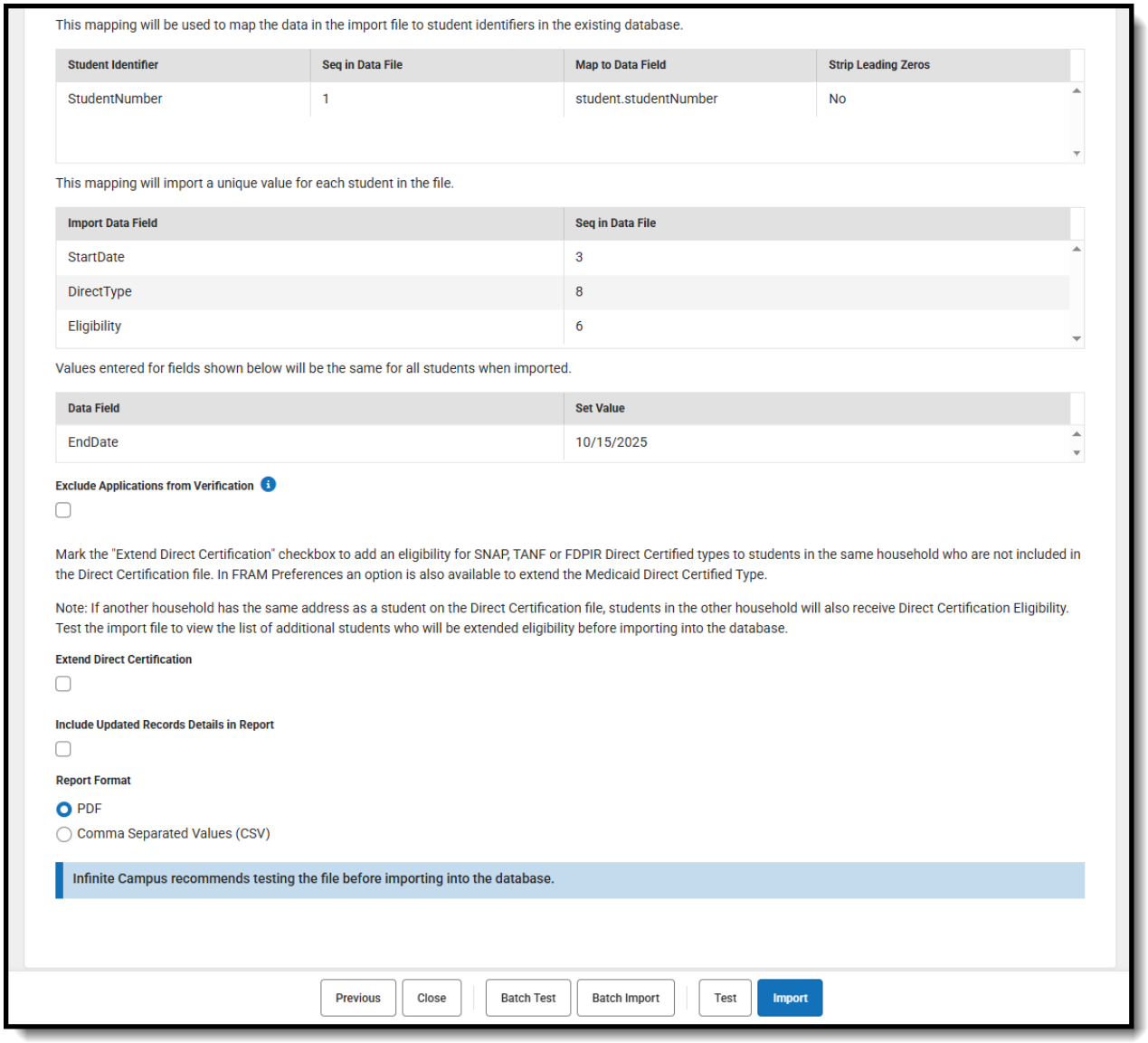
f. Verify that your data appears correctly in the **Mapped Data Fields** table.

3. If needed, enter an Eligibility End Date. The End Date will automatically use the Default Expiration Date from FRAM Preferences. Select a different date if necessary.

4. Review all information for accuracy and click **Continue** to proceed to the next step.

Step 5. Confirmation Review

After mapping and saving values from the import file, the import can be reviewed, tested, and finalized. Fields on this screen are displayed according to the previously selected options.



Field Descriptions

Field	Description
Exclude Applications	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. 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**. 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. 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.

Field	Description
Extend Direct Certification Status to Additional Students in Household	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. If the FRAM Preference option is set, users may also extend the Medicaid Direct Certified Type. **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.
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.

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 **Import** on the pop-up window to confirm the import. 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. Click **Batch Test** to generate the Eligibility Import Report preview of how the values of the

import file will be imported to the database. The Batch Queue Reporting Options window displays.

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

Field	Description
High Priority	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. This checkbox can only be marked if a user has the proper tool right access (*i.e.*, at least **R** rights to the Set Task Priority sub-right located in the Tool Rights index under Ad Hoc Reporting > Batch Queue).
Keep Until I Delete	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. This checkbox can only be marked if a user has the proper tool right access (*i.e.*, at least **R** rights to the Set Task Expiration sub-right located in the Tool Rights index under Ad Hoc Reporting > Batch Queue).
Start Date/Time	Indicate the date and time at which the Batch Queue should begin to generate the report.

3. Click **OK** to submit this report to the Batch Queue. While waiting for the Batch Test to complete, exit the Eligibility Import Wizard. 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.
4. Return to Step 1 of the wizard and click the **Edit** button.

5. Adjust the data file contents and/or mappings if necessary and continue to Step 5 of the wizard.
6. Click **Batch Import**. The Batch Queue Reporting Options window displays.
7. 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.