

Importing a Direct Certification File

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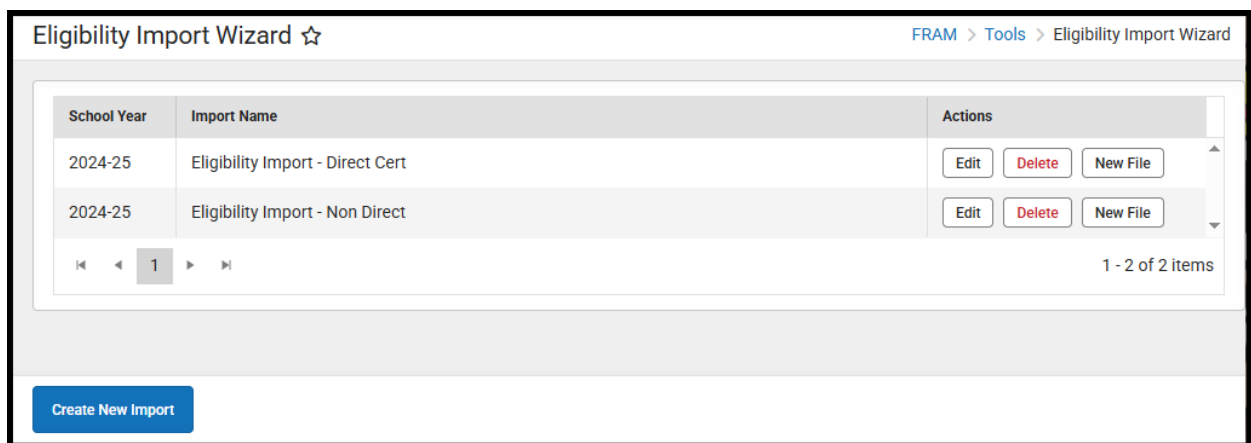
Tool Search: Eligibility Import Wizard

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.



The screenshot shows the 'Eligibility Import Wizard' interface. At the top, there is a breadcrumb trail: 'FRAM > Tools > Eligibility Import Wizard'. Below this is a table with two columns: 'School Year' and 'Import Name'. The table contains two rows, both for the '2024-25' school year. The first row is 'Eligibility Import - Direct Cert' and the second is 'Eligibility Import - Non Direct'. To the right of the table is an 'Actions' column with buttons for 'Edit', 'Delete', and 'New File' for each row. Below the table is a pagination bar showing '1' of 2 items. At the bottom left, there is a blue button labeled 'Create New Import'.

School Year	Import Name	Actions
2024-25	Eligibility Import - Direct Cert	Edit Delete New File
2024-25	Eligibility Import - Non Direct	Edit Delete New File

1 - 2 of 2 items

Create New Import

Creating a New Import

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

Eligibility Import Wizard ☆ FRAM > Tools > Eligibility Import Wizard

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File Information Student Identifier Identify Data Data Mapping Review

Enter a unique name for the import and make a selection for each option below. Select the file you wish to import and click 'Upload & Continue'.

Import Name (Required)

25-26 Direct Import

School Year

29-30

File Type (Required)

Comma Separated Values

What data will be used as the student identifier? (Required)

Student Number

Is this a direct certification file?

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

☒ Yes

☐ No

Does the file include headers?

☒ Yes

☐ No

Select files... Drop files here to ...

Cancel Upload & Continue

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

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File Information
Student Identifier
Identify Data
Data Mapping
Review

The first table is the raw data from the uploaded file. The second table is data that has been mapped to be imported from the uploaded file.

Raw Data File

1	2	3	4	5	6	7	8	9	10
N	School year	Start Date	End Date	Eligibility Type	Eligibility	Source	Direct Type	Medicaid	SCHIP Opt
135221	25-26	8/29/20...	10/15/2...	Meal	Free	Direct	SNAP	N	N
2410001...	25-26	8/15/20...	10/15/2...	Meal	Reduced	Direct	Medicaid	N	N
1410500...	25-26	8/29/20...	10/15/2...	Meal	Reduced	Direct	Medicaid	N	N

Mapped Data Fields

No records available.

Indicate the column the data field(s) correspond to from the uploaded raw data file, then select 'Map Data'. If applicable select if any leading zeros need to be stripped. The student identifier data will display in the 'Mapped data Fields' table. This mapping will be used to match the data in the import file to student identifiers existing in the database. If everything looks correct, select 'Continue' to move on to the next step.

Student Number (maps to student.studentnumber)

Seq in data file: ▲ ▼ ☐ Strip Leading Zeros

Map Data

Previous

Cancel

Continue

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.

Is Eligibility, Direct Certified Type or the Start Date the same for every student in the file?

If Yes, then select the value for all students.

If No, then the data will need to be mapped. Indicate the column the data field(s) correspond to from the uploaded Raw data File, then select 'Set Value'. For the start date, select the date format used in the file. For Eligibility and Direct Certified Type, the values within the column will appear in the table to the right. Select the Campus value that matches the value from the raw data. When the table is complete, select 'Map Data'. The Mapped data will display in the 'Mapped data Fields' table above.

The End Date will default to the Default Expiration Date set in FRAM Preferences. Select a date if necessary.

If everything looks correct, select 'Continue' to move onto the next step.

Eligibility

☒ Yes ☐ No

Select Value (Required)

Direct Type

☒ Yes ☐ No

Select Value (Required)

Eligibility Start Date

☒ Yes ☐ No

Select Value (Required)

month/day/year

Eligibility End Date (Required)

month/day/year

Previous

Cancel

Continue

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.

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

Student Identifier	Seq in Data File	Map to Data Field	Strip Leading Zeros
StudentNumber	1	student.studentNumber	No

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

Import Data Field	Seq in Data File
StartDate	3
DirectType	8
Eligibility	6

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

Data Field	Set Value
EndDate	10/15/2025

Exclude Applications from Verification ?

☐

Mark the "Extend Direct Certification" checkbox to add an 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

☐

Include Updated Records Details in Report

☐

Report Format

☒ PDF

☐ Comma Separated Values (CSV)

Infinite Campus recommends testing the file before importing into the database.

Previous
Close
Batch Test
Batch Import
Test
Import

Field Descriptions

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

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

Testing and Importing the File

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

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

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.

Eligibility Import Wizard ☆

FRAM > Tools > Eligibility Import Wizard

School Year	Import Name	Actions
25-26	25-26 Direct Import	<div>EditDeleteNew File</div>
24-25	24-25 Import	<div>EditDeleteNew File</div>
23-24	23-24 Direct Import	<div>EditDeleteNew File</div>

- Adjust the data file contents and/or mappings if necessary and continue to Step 5 of the wizard.
- Click **Batch Import**. 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](#).