Importing a 3rd Party Eligibility 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 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.
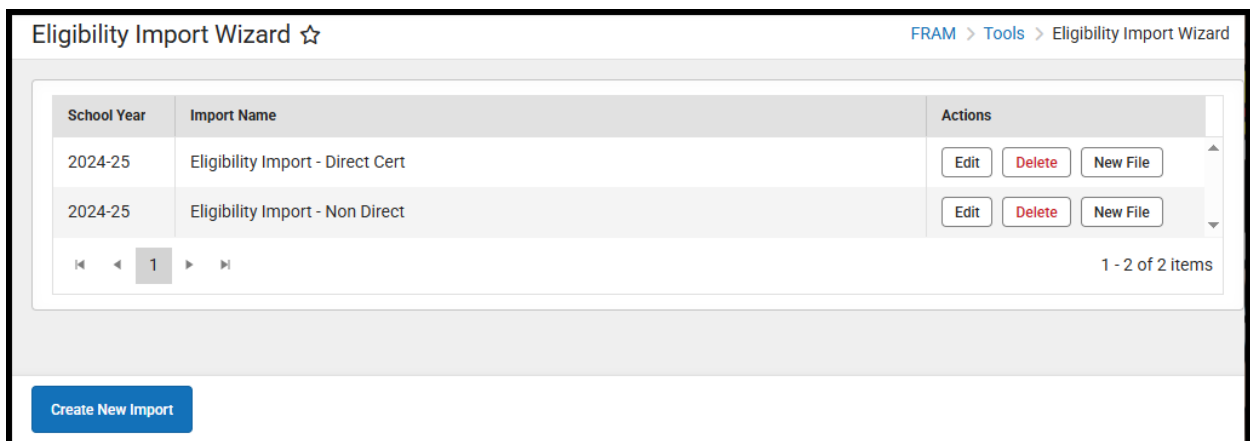
Creating a New Import

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

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

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.

For data that needs to be mapped, indicate the column the data field(s) correspond to from the uploaded Raw data File, then select 'Set Value'. 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.

For data that does not need to be mapped, select that value that will be applied for every student.

If everything looks correct, select 'Continue'

Certified Type will not be mapped based on selecting no in previous step. When importing a Direct Certification file from a Local or State agency, Infinite Campus recommends using the Direct Certification file option in Step 1

Eligibility

Seq in File (Required)

[ ] [▲▼] [Set Value]

Eligibility Type (Required)

[Meal   ▼]

Direct Type

Seq in File (Required)

[ ] [▲▼] [Set Value]

Eligibility Start Date

Seq in File (Required)

[ ] [▲▼] [Set Value]

Eligibility End Date

Seq in File (Required)

[ ] [▲▼] [Set Value]

Medicaid Opt Out

Seq in File (Required)

[ ] [▲▼] [Set Value]

SCHIP Opt Out

Seq in File (Required)

[ ] [▲▼] [Set Value]

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.