Getting Started with Eligibility Import

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Tool Search: Eligibility Import Wizard

The Eligibility Import Wizard uploads and imports data files containing student meal service and socioeconomic eligibilities. The wizard includes steps for mapping values from the data file to the Campus database for state reporting and food service purposes. Student eligibility data can be viewed using the [Eligibility](#) tool

Important Information about this Tool

- 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" in the file, 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.

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.

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 a user with access rights to the district and NOT as a state-wide user.

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**. The file must include information identifying the students. The import wizard accepts only the following types of information as the Unique ID:
  - PersonID
  - 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 the Last Name, First Name, and 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)

Determining Eligibility During the School Year

Families may apply for school meals or report a change that increases their benefits anytime during the school year. When your district uses the Eligibility Import Wizard to update these eligibilities, Campus uses the following logic to determine whether a child should be assigned a new eligibility.

If the imported Certification is...	Then Campus...
a higher rank than the child's existing certification	**updates** the child's eligibility record to the higher certification.
a lower rank than the child's existing certification	does NOT update the child's eligibility record. A subsequent direct certification contact indicating that a child is *no longer receiving benefits* from an Assistance Program or other Categorically Eligible program does **not** change the child's eligibility status for the current school year. The child remains eligible for free school meals through the end of the school year and for up to 30 operating days into the subsequent school year, due to the year-long eligibility requirement.

If the **Non-Direct Eligibility Overwrite** checkbox is marked in FRAM Preferences, new non-direct eligibilities imported from the Eligibility Import Wizard will overwrite existing non-direct eligibilities regardless of current eligibilities and dates.

This logic only applies when you are importing eligibility files during the school year. If it is a NEW school year, Campus updates all eligibility statuses regardless of the old status or dates. New eligibilities are effective as of the start date in the upload file.

Rank	Certified Type	Source	Eligibility
1	SNAP	Direct	Free

Rank	Certified Type	Source	Eligibility
2	TANF or FDPIR	Direct	Free
3	Runaway, Foster, Medicaid, Homeless, Migrant	Direct	Free
4	Runaway, Foster, Medicaid, Homeless, Migrant, Head Start, Even Start	Non-Direct	Free
5	Income, RCCI, Override, SES	Non-Direct	Free
6	Runaway, Foster, Medicaid, Homeless, Migrant, Head Start, Even Start	Non-Direct	Reduced
7	Income, RCCI, Override, SES	Non-Direct	Reduced
8	Declined, Denied, Did not Apply	Non-Direct	Reduced
9	Paid	N/A	Non-reimbursable
10	Adult	N/A	Non-reimbursable

Logic Used During the School Year

When importing eligibility files, it is important to consider the dates included in the file.

This logic only applies when you are importing eligibility files during the school year.

If it is a NEW school year, Campus updates all eligibility statuses regardless of the old status or dates. New eligibilities are effective as of the start date in the upload file.

Date Logic

Campus always creates a new record for the dates not covered by the previous record.

As part of this process, Campus will add an End Date to the current eligibility if:

- the eligibility has not changed, Campus will add an End Date to the current eligibility if the new imported End Date is after the existing End Date.
- the eligibility of the new record is better than the previous record, Campus will add an End Date to the current eligibility if the imported End Date is the same or after the existing End Date.

the eligibility has not changed, and the start date of the new record is before the start date of the current record, a new record for the time not covered by the previous recorded will be added.

Direct Certification Import Logic

- A new Direct Source Type eligibility will overwrite an existing Non-Direct Source Type eligibility for the same school year if the Start Date is the same or before the existing Non-Direct Source Type eligibility. This includes Non-Direct Source Types of Homeless, Migrant and Runaway. Only those marked as Direct Source will not be overwritten. On the Eligibility Import Report, the student appears in the **Updated Records** section with the Statuses of *New* or *Removed* when **Include Detail** is selected.
- A new Direct Source Type eligibility will add a new consecutive eligibility to an existing non-Direct Source Type eligibility if the new direct certification start date is after the existing non-direct certification start date. On the Eligibility Import Report, the student appears in the **Updated Records** section with statuses of **New** or **Ended** when Include Detail is selected.

3rd Party Eligibility File Import Logic

- If the **Non-Direct Eligibility Overwrite** checkbox is marked in FRAM Preferences, new non-direct eligibilities imported from the Eligibility Import Wizard will overwrite existing non-direct eligibilities regardless of current eligibilities and dates.

- A new Direct Source Type or Non-Direct Source Type eligibility with the same or earlier Start Date will overwrite an existing Non-Direct Type eligibility, including non-Direct Homeless, Runaway and Migrant. On the Eligibility Import Report, the student appears in the **Updated Records** section with the Statuses of *New* or *Removed* when **Include Detail** is selected.
- If the Start Date for a new Direct Source Type or Non-Direct Source Type eligibility on file is after the existing Non-Direct Source eligibility, the import ends the existing Non-Direct Source eligibility the day before the new eligibility Start Date making the dates consecutive. On the Eligibility Import Report, the student appears in the **Updated Records** section with statuses of **New** or **Ended** when Include Detail is selected.
- If the import contains matching Non-Direct Source Type eligibility and matching dates on file, then no change is made to the record. On the Eligibility Import Report, the student appears in **Existing Eligibility Records** section when Include Detail is selected.

Extending Direct Certification to Other Students in a Household

Only SNAP, TANF and FDPIR Direct Types may be extended to other students in a household. Users may extend the Medicaid Direct Certified Type if the FRAM Preference option is set.

When extending Direct Certification to other students in a household, the tool considers the following:

- Primary household members with enrollments in the School Year selected AND
- Primary household members who also have household membership within the span of their

enrollment Start and End Dates within the School Year.
- If there is another household that has the same address as a household which has students on the file, they will also receive Direct Certification Eligibility.
- If a direct certified file contains household members with more than one Direct Type of SNAP, TANF, FDPIR or Medicaid (when FRAM Preference is set), then the tool extends the Direct Certification to other student members in the household using the following ranking logic:
    1. SNAP
    2. FDPIR
    3. TANF
    4. Medicaid (When FRAM Preference is set.)

Example

Mary is on the direct certification file. Mary is part of a household where John has a current enrollment but has a future Household Member Start Date within the school year when he is scheduled to move into the household (examples include a custody situation, adoption or foster care possibly). John will be extended the direct certification eligibility in this circumstance because he has a current enrollment in the school year and will be part of the household within his enrollment Start and End Dates.

If there is any concern about extending eligibility to a household member with a future member start date who may not end up joining the household, it is recommended the district review the additional direct certified eligible students updated on the Eligibility Import Report.