

# Eligibility Import Wizard

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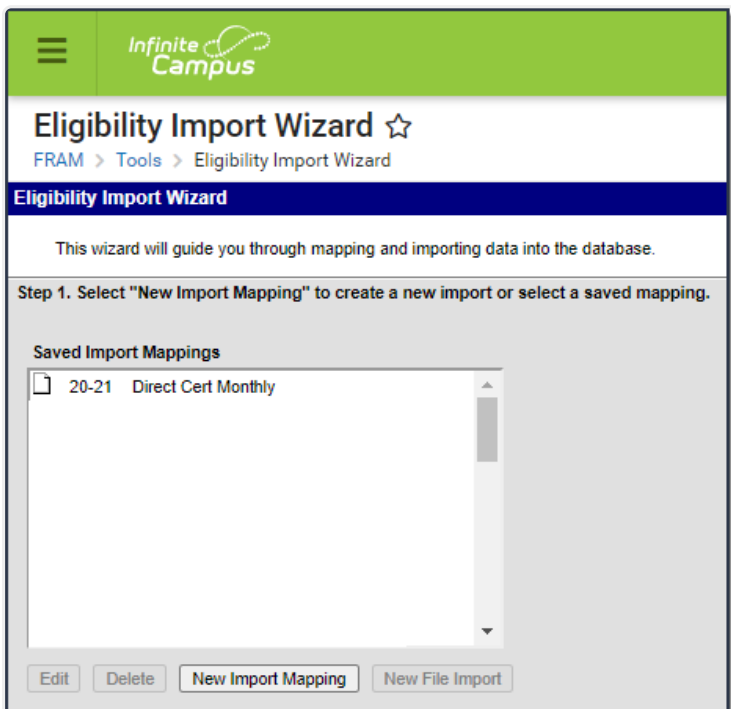
**Classic View:** FRAM > Eligibility Import Wizard

**Search Terms:** Eligibility Import Wizard

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

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

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



*Eligibility Import Wizard*

# Important Information about this Tool

- Import files may contain Direct Certification Types.
- If more than one type of eligibility value exists in the import file, the values must be mapped to existing values in the database.
- The wizard allows the values within the data file to be imported "as is" (keep original values), *OR* allows the user to select a value to be mass-assigned to all students through the import.
- Reminder, when testing the upload, the test results may not match the final upload if the upload file includes multiple/duplicate entries for the same student. The test logic looks at the final entry in the upload file and uses that eligibility whereas the final upload applies additional logic.
- **Districts Importing Direct Certification files for Medicaid** : When using the Eligibility Import Wizard and selecting the option for Extending benefits to additional students in the household, this option will only extend benefits to students in the same household *who are NOT included in the Direct Certification file*. If you are importing a Medicaid Direct Certification file containing both Free and Reduced eligibility, a best practice is to split the Direct Certification file by Free status and Reduced status. Once split, upload the files in order of the most advantageous status first (Free first, then Reduced) and mark the *Extend benefits to additional students in the household* option. This will ensure that, students in the same household with differing Free/Reduced statuses on the Direct Certification file are extended the Free eligibility along with any student household members not on the file.
- A complete import and its associated mapping may be saved and re-used.
- **State-Level Imports**: The Eligibility Import Wizard available to state-level users has the following, additional requirements/restrictions.
  - The wizard can only be used to import eligibilities for students enrolled in the district importing the file.
  - The import wizard will only display import mappings from the district to which the currently logged in user has access rights.
  - To complete an import, you must be logged in as as a user with access rights to the district and NOT as a state-wide user.

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

## Import File Requirements

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

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

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

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

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

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

#### Additional Requirements for State Level Use

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

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

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

### 3rd Party Eligibility File Requirements

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

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

## Eligibility Import Report Example

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

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

**Summary**

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

**Error/Warning**

**Existing Eligibility Records**

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

**Not Excluded**

Application Name	Reference #	Children	Action

**Additional Direct Certified Eligible Students**

Household Name	Student Name	Updated

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

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

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

## Import a 3rd Party Eligibility File

▶ [Click here to expand...](#)

## Import a Direct Certification File

▶ [Click here to expand...](#)