Importing a 3rd Party Eligibility File

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Classic View: FRAM > Eligibility Import Wizard

Search Terms: Eligibility Import Wizard

The procedures described here allow you to import an eligibility from a 3rd party system that may have a combination of non-direct and direct certification eligibilities.
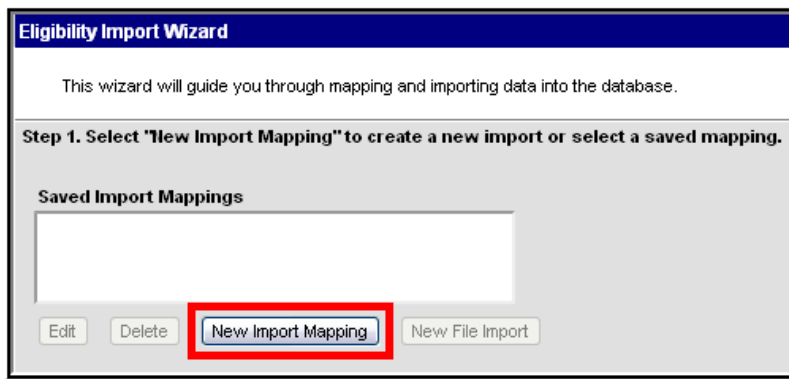
If you are importing a direct certification file, see the Importing a Direct Certification File article.
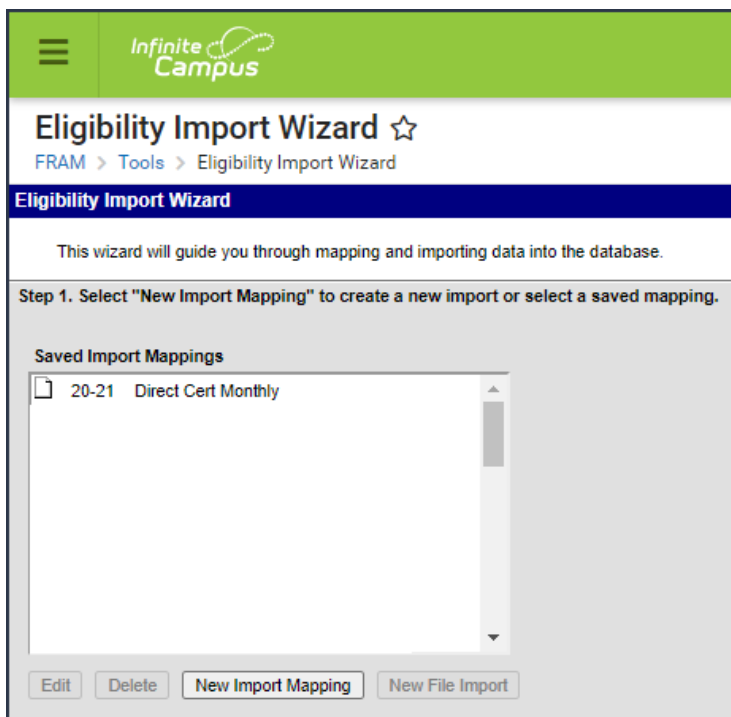
Step 1. Starting a New Import

To start the import process, create a mapping between the eligibility file and the Campus database location in which the data values should be stored.

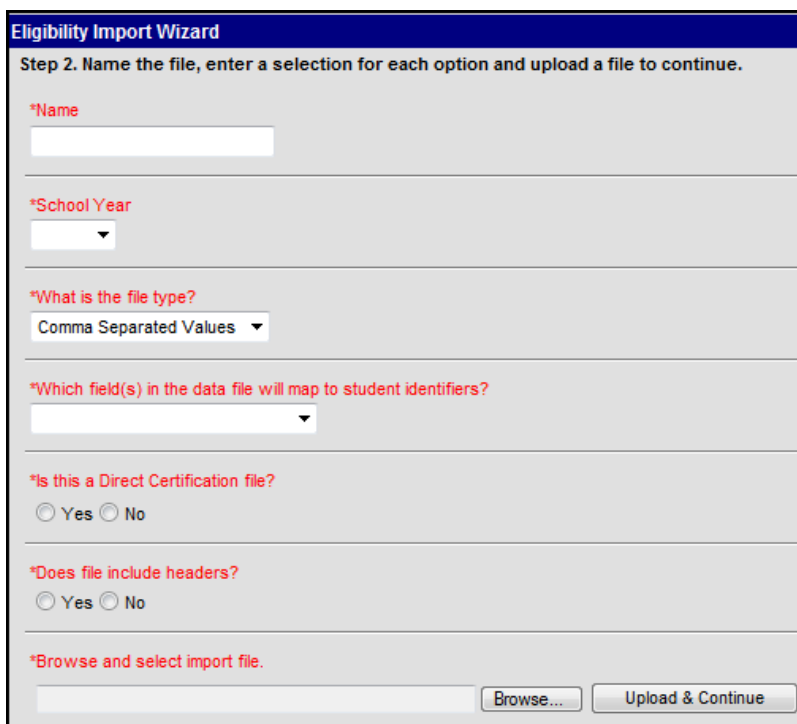1. Click the **New Import Mapping** button from the setup screen.

Result
Step 2 of the Wizard displays.

2. Go to **Step 2. Entering Import File Details**.

Step 2. Entering Eligibility File Details

Step 2 of the wizard allows you to name the new import mapping and set specific parameters. This screen is also where you identify whether you are importing unique eligibility statuses or assigning the same eligibility status to all students in the eligibility file.

1. Enter a **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.

   > Each year, eligibility mappings need to be edited or created as new for the new school

year.

3. Select the format of the eligibility file from the **File Type** field. The acceptable file formats are:
    - Fixed Width
    - Comma Separated Values
    - TAB Delimited
4. Select the student identification option contained in the eligibility 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 eligibility 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)
    - Other ID (Maps to NASIS ID for BIE Only)

5. Select **No** under the question **Is this a Direct Certification file?**

    > 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 eligibility file contains headers (identifying the content of each data column) by selecting Yes or No under the question **Does file include headers?**

    > The wizard does NOT import values from the header row.

7. Click the **Browse...** button to select the eligibility file to be imported and click the **Open** button to return to the import wizard screen.

8. Click the **Upload & Continue** button to save this screen.
    Result
    Step 3 of the Wizard displays.
9. Go to **Step 3. Mapping Student Identifiers**.

Step 3. Mapping Student Identifiers

Step 3 of the wizard allows you to map the contents of the eligibility file to the Campus database. The contents of the eligibility 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 eligibility file (*i.e.*, if the Name column of the mapping editor lists Student Number, the eligibility 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** field(s) of the mapping editor.

> **Fixed-width Files Only**
> If importing from a fixed-width file, enter values related to the the student identifier in the Start Position and Characters Long fields.

2. Mark the checkbox(es) in the **Strip Leading Zeros** column of the mapping editor if the student identifier values of the data file start with zero(s) that should be removed before importing.
3. Click the **Map Fields** button to save the mapping of student identifying data from the eligibility file to the Campus database.
4. Click the **Next** button.
   Result
   Step 4 of the wizard displays.
5. Go to **Step 4. Entering Values**.

Step 4. Identifying Fields to Import

Step 4 of the wizard allows you to identify the fields you want to import from the eligibility file to the

Campus database. Step 5 - Setting Values allows you to select values for the fields that you do not import.

1. Select **Yes** or **No** next to all of the options.
   - Select **Yes** next to 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 5 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 to **Step 5. Selecting Values**.

Step 5. Setting Values

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

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**. **Result** The Field Map window displays. 3. Map the data file's values to the database by selecting options from the Campus fields. 4. Click **Save**.
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 6. Confirmation Review

After values from the eligibility file have been mapped and saved, the data can be reviewed, tested and imported. **Fields on this screen display according to 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.

Field	Description
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

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.

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 eligibility file will be imported to the database.

   Adjust the data file contents and/or mappings if necessary. The import mapping is automatically saved and may be imported at a later time. If a student appears multiple times on the eligibility file, the student will appear multiple times on the Eligibility Import Report.

2. Click the **Import** button.
3. Click **OK** on the pop-up window to confirm the import.
   Result
   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. Select the **Test** option in the **Batch Import Options** field to generate the Eligibility Import Report preview of how the values of the eligibility file will be imported to the database.

2. Click the **Batch Test** button.
   Result
   The Batch Queue Reporting Options window displays.

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

Field	Description

| 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 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 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.

4. Click the **OK** button.
   Result
   The Success window displays.

5. Click **OK** to submit this report to the Batch Queue. While waiting for the Batch Test to complete, exit the Eligibility Import Wizard.
   Result
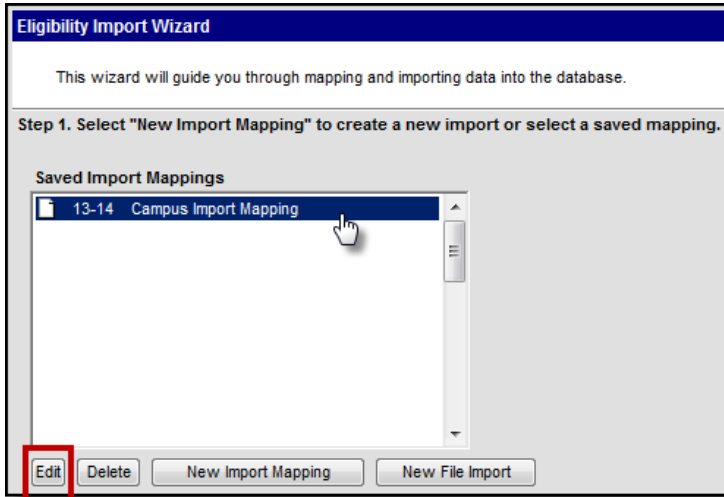   The report will wait for the date and time scheduled for generation. Upon completion, the Eligibility Import Report will be available in the Process Alerts (formerly Process Inbox) for your review.
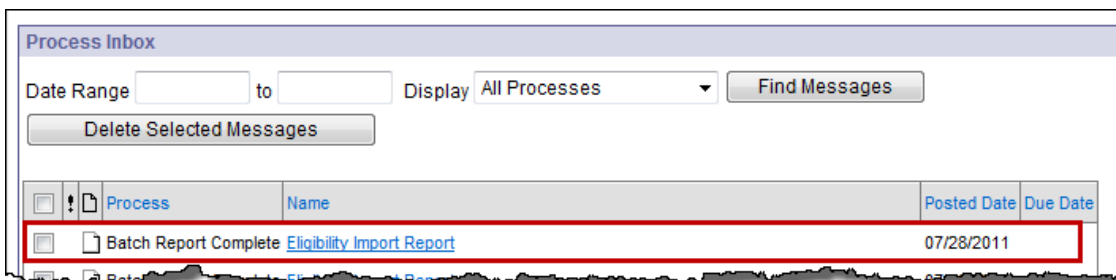
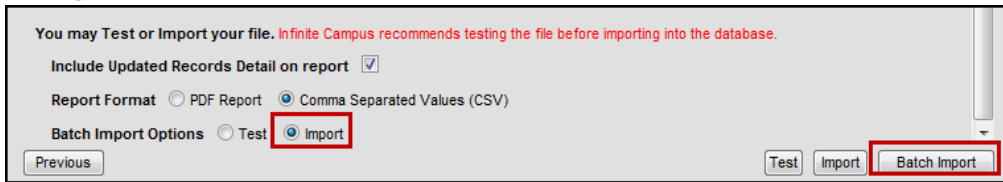The import mapping is automatically saved and may be imported at a later time.

6. Return to Step 1 of the wizard and select your Saved Import Mapping.
   Example

7. Click the **Edit** button.
8. Adjust the data file contents and/or mappings if necessary and continue to Step 5 of the wizard.
9. Select the **Import** option in the **Batch Import Options** field.
   Example

10. Click the **Batch Import** button.
    Result
    The Batch Queue Reporting Options window displays.

11. 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 criteria for any import in Pending status in the Batch Queue.