



AAMC

Electronic Residency
Application Service

2018 ERAS

Program Director's Workstation (PDWS)
User Guide

ERAS® is a program of the
Association of American Medical Colleges

www.aamc.org/eras

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Welcome

Welcome to the Program Director’s Workstation (PDWS) User Guide. The PDWS is used by programs to evaluate residency and fellowship applications. This is done by reviewing application materials, managing interviews, sending messages, generating reports, and ranking applicants. A ranked list of applicants can be created to send to the National Residency Matching Program (NRMP), the National Matching Service (NMS), or another entity.

Electronic Residency Application Service



AAMC.ORG MY ACCOUNT MESSAGE CENTER (7) SIGN OUT

Dashboard Applications Scheduler Rankings Reports Archives Setup Program Messages(0)

ERAS TEST SPONSOR MD 1 > All Groups > Family Medicine

Search | Help | Bulk Print Requests | Setup

Residency Management System (RMS)

ERAS has collaborated with E*Value, MedHub, MyEvaluations.com, New Innovations, and Medtrics to enable you to easily transfer applicant, placement, and performance data seamlessly from the PDWS. The Designated Institutional Official (DIO)/ Director Medical Education (DME) for your program has not selected the use of any residency management system (RMS).

Please contact your DIO/DME to update this information. Access to these data for transfer into your RMS will remain available until the end of your application season, May 31, 2017.

Withdrawn & Reinstated Notifications

User Name:	Applicant Name:	Action:	Date:
	test_sreestaging	Reinstated by Applicant	02/10/2017 04:27:57 AM
	test_sreestaging	Withdrawn by Applicant	02/10/2017 04:27:19 AM
	test_sreestaging	Reinstated by Applicant	02/10/2017 04:25:10 AM
	test_sreestaging	Withdrawn by Applicant	02/10/2017 04:23:44 AM
	test_sreestaging	Reinstated by Applicant	02/10/2017 04:10:01 AM
	test_sreestaging	Withdrawn by Applicant	02/10/2017 04:08:36 AM
	test_sreestaging	Reinstated by Applicant	02/10/2017 04:02:17 AM
	test_sreestaging	Withdrawn by Applicant	02/10/2017 03:59:22 AM
	Den_Peter	Reinstated by Applicant	02/09/2017 01:05:00 PM
	Den_Peter	Withdrawn by Applicant	12/14/2016 11:33:17 AM

Data Filters

These are the default Data Filter preferences for your program. You may accept or change the fields selection. They were last changed on 06/20/2016 03:22:33 PM by S.Kazmi

Screened	Viewable
	Birth Date
	Birth Place
	Citizenship
	Felony Conviction
	Gender
	Limitations
	Misdemeanor Conviction
	Photograph

ERAS Notices

Page 1 of 2

Test Notice ERASSEND	04/11/2017
Test Notice ERASSEND	04/11/2017
Test Message 2	04/11/2017

PDWS Updates

Application Activity

Start: Tue, Apr 25, 2017 12:00 AM

End: Wed, Apr 26, 2017 12:00 AM

☐ Limit results to currently filtered applicants

[Update Results](#)

Reports

Name :

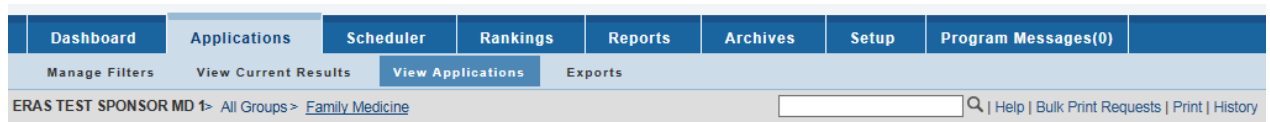
Getting Started with PDWS

The first step to using PDWS is becoming familiar with the main areas of the program.

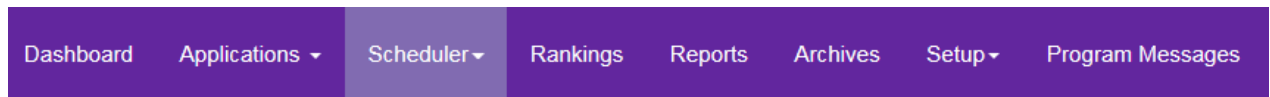
Dashboard - Landing Page.



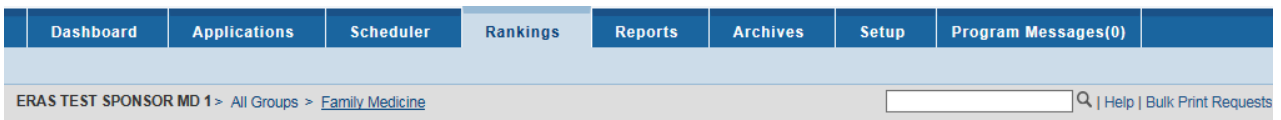
Applications - Display individual applications and attached documents.



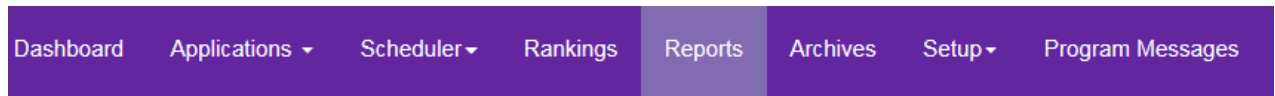
Scheduler - Invite applicants/interviewers and schedule interviews.



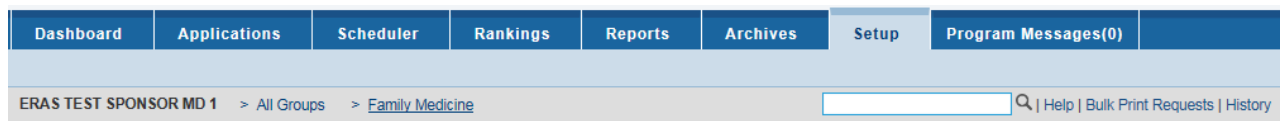
Rankings - Compare and rank applicants.



Reports - Generate and view reports.



Setup - Manage users and set program defaults.



Program Messages - Display sent and received messages.



Understanding the User Interface

Below is a list of frequently used terms throughout the PDWS User Guide.

Tabs

A standard Windows control that provides navigation between different screens or sections of information.

Panel

A delineated area within a screen that groups information or functions. There can be multiple panels on a screen, and panels can also be nested.

Tabbed Panel

A panel that contains a collection of tabs.

Header

A panel that continually displays specific data fields, even though the data itself may change.

Light Box

A secondary, floating, moveable window that allows users to perform a command, asks users a question, or provides users with information or progress feedback.

Table

Data organized in columns (fields) and rows (records).

Drawers

Additional fields or functions revealed (or hidden) using a toggle inside a panel.



Controls

An object that enables user interaction or input, often to initiate an action, display information, or set values. There are several standard controls in ERAS, including buttons, checkboxes, drop- down lists, and radio buttons.

Button

A small graphic element or defined text area that initiates a command when selected.

Radio Button

An input selection that can be used to select from mutually exclusive choices – only one may be selected at a given time.

Checkbox

An input selection that can be used to select more than one option from a list of choices.

Drop-down List

An input selection that can be used to select one choice from a list of choices.

Text Box

A box for entering and editing text.

Auto-complete Function

A function that provides alternative text based upon previously-typed entries.

Icon

A pictorial representation of an object, often selectable. May link to other content.

Link

Text or graphics that navigates to other content when selected.

Date Picker Icon

An icon that opens an interactive calendar in a small overlay used to select a date.

Start:

Thu, Dec 01, 2016

December 2016

S	M	T	W	T	F	S
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today

Choose Level (Toggle)

The Choose Level feature, referred to as a toggle, allows Institution Super Users to view data for a specific program within their institution. After logging in to the PDWS, select the institution data to view from the Choose Level dialog box. This is required when logging in for the first time. Within institution, select program and specialty levels to further narrow the data to view.

To Change the Level to View:

1. Click the Institution or Specialty name on the bar under the main navigation.



2. Select the level of information to view from the drop-down lists.

 A screenshot of the 'Choose Level' dialog box. The title bar says 'Choose Level'. Below the title bar, there is a message: 'Please select the level you'd like to view. You may update your selection at any time after you've logged into the PDWS.' There are three dropdown menus: 'Institution' with the selected value 'The AAMC/ERAS Hospital for Health Improvement I' and a '(required)' label; 'Program' with the selected value 'AAMC/ERAS Internal Medicine Program1 (Testing Only)'; and 'Specialty' with the selected value 'Internal Medicine'. At the bottom right, there are three buttons: 'Continue', 'Clear', and 'Cancel'.

3. Click the **Continue** button.
 - The relevant data is now available.
 - Institution level users must first toggle to a Program level in order to see any Program specific tabs (e.g., Applications, Scheduler, Rankings) and Program related choices under the Setup tab.

Application Review Process

The main goal of a Program Director using PDWS is to create a list of applicants, called the Ranked Order List (ROL), to send to the National Residency Matching Program (NRMP), the National Matching Service (NMS), or another entity. Several tasks are performed before the ROL can be created:

Step 1: Find Applicants to Interview

- Receive applications for available positions.
- Sift through the applications with the goal of finding the desired number of applicants to interview for each position.
- Use the **Manage Filter** tools to locate applicants that meet specific criteria.

Step 2: Schedule the Interviews

- Contact interviewers for availability.
- Invite applicants for interviews.
- Schedule applicants for interviews.
- View and maintain a calendar of interviews.

Step 3: Evaluate Applicants

- After the interview is complete, enter comments and scores.
- Enter Document scores.
- Various attributes defined by the program should be flagged.
- Enter in Reviewer notes and scores.

Step 4: Rank Applicants

- Create a ranked list of applicants to send to the appropriate matching organization.

Roles and Permissions

The PDWS has pre-defined roles that were developed by ERAS Business staff in consultation with program users and others, as a way of providing a smooth method of assigning permissions to PDWS users. Each role carries specific permissions and determines what tasks the user can perform within the PDWS.

- Permissions are privileges granted to a user to perform specific actions within the PDWS.
- Roles consist of a set of permissions for a given type of user within the PDWS.

There are two categories of roles:

1. Super User Roles

- Institution Super User
- Program Super User

2. Program User Roles

- Program Coordinator
- Reviewer_Interviewer

Super Users

Super User roles include two permission levels: Institution Super Users and Program Super Users. These roles have the most control over the PDWS and how it is set up.

Institution Super User (ISU)

The Institution Super User and Alternate Institution Super User can create and modify institution and program super users access. An Alternate Institution Super User cannot assign or revoke an Institution Super User role.

Task Permissions for Institution Super Users

- Set up Program Super Users
- Manage users
- Set up Data Filters
- Authorize Residency Management System (RMS) for programs

Program Super User (PSU)

The Program Super User and Alternate Program Super User manage setup tasks to enhance the client experience in using the PDWS.

Task Permissions for Program Super Users

- Assign and revoke user roles
- Create attributes
- Define scores and weights
- Add and edit statuses
- Set up the ranking comparison tool
- Modify data filters
- Manager the Scheduler and Interviewer Tools

The Program Super User has all the system task permissions given in the Program Coordinator role.

Alternate Super Users can designate other users as Alternate Program Super Users, but otherwise have the same permissions as a Program Super User

Program Users

Program User roles have more limitations than Super Users. There are three levels of Program Users: Program Coordinators, Interviewers, and Reviewers. Each of these roles is divided into the following levels:

- **Program Coordinators 1** and **Reviewers_Interviewers** have read and write access to the PDWS, allowing them to view information and make changes. Program Coordinators 1 can invite new users. Reviewers_Interviewers can only see the applicants to whom they are assigned or scheduled to interview.
- **Program Coordinators 2** and **Reviewers_Interviewers Read-Only** access have the ability to only view information in the PDWS. They can use filters to find and view applicants, and can view selected reports. However, these users cannot mark statuses, schedule applicants for interviews, etc. Reviewers_Interviewers Read-Only access can only see applicants to whom they are assigned or scheduled to interview.
- **Reviewers_Interviewers Limited Access** can only see applicants to whom they are assigned or scheduled to interview, have limited access to their documents, and cannot access system or user-defined filters.

Note: Level 1 Program Super Users and Program Coordinator 1s can assign applicants by using the 'Assign Applicants' option available in the Applications page. Applicants can also be assigned as a bulk action from the 'View Applications' page.

Program Coordinators

A Program Coordinator 1 has similar roles as a Program Super User.

Task Permissions for Program Coordinator 1

- Set up Attributes, Scores, and Weights
- Set up the Ranking Comparison Tool
- Filter Applicants
- Schedule Applicants for Interviews
- View/Print Applications, Schedules, and Reports

Reviewers_Interviewers

All Reviewers_Interviewers see only the applicants who have been assigned or scheduled to them. These users can only view the Reviewer or Interviewer comments/scores they entered.

Task Permissions for Reviewer_Interviewer

- Update Applicant Statuses and Attributes
- Review and Score All Applicants
- Enter and Manage Notes
- Create Reports
- View/Print Applications, Interview Reports, and Ranking Reports
- Update Applicant Statuses and Attributes
- Enter Interview Comments and Scores
- Enter Review Comments and Scores

Task Permissions for Reviewer_Interviewer Read-Only

- View Applicant Statuses, Scores, and Attributes
- Apply Saved Filters
- View Notes
- View Data Filters
- View/Print Applications
- View Calendar views and Schedule
- View Interview records

Task Permissions for Reviewer_Interviewer Limited Access

Reviewer_Interviewer Limited Access has a restricted view of the application and cannot view transcripts or Board Scores. A Reviewer_Interviewer Limited Access can view their Schedule, and enter Review or Interview Scores and Comments.

- Update the status of an application
- Update attributes that were created during pre-season setup
- Enter a note regarding the applicant and view comments made in response to their note

-
- Add document scores and custom scores (if they exist)
 - View and print reports from *Current Results* for one or more applicants

Dashboard

After logging into the system, each user lands on their dashboard. The dashboard provides an overview of application activity and important communications. The panels displayed will depend on the user’s role.

Note: During SOAP (Supplemental Offer and Acceptance Program®), SOAP participating programs will see a message stating SOAP participation and additional information.

Dashboard
Applications
Scheduler
Rankings
Reports
Archives
Setup
Program Messages(14)

ERAS TEST SPONSOR MD 1 > All Groups > Family Medicine

Residency Management System (RMS)

ERAS has collaborated with E*Value, MedHub, MyEvaluations.com, New Innovations, and Medtrics to enable you to easily transfer applicant, placement, and performance data seamlessly from the PDWS. The Designated Institutional Official (DIO)/ Director Medical Education (DME) for your program has not selected the use of any residency management system (RMS).

Please contact your DIO/DME to update this information. Access to these data for transfer into your RMS will remain available until the end of your application season, May 31, 2017.

Withdrawn & Reinstated Notifications

User Name:	Applicant Name:	Action:	Date:
	Goku, Son	Reinstated by Applicant	02/23/2017 09:50:11 AM
Mathew, Diana	Den, Peter	Withdrawn by Program	02/10/2017 04:30:59 AM
	Den, Peter	Reinstated by Applicant	02/09/2017 01:05:01 PM
Lee, Gary	George, Regina H	Reinstated by Program	01/25/2017 11:33:36 AM
Lee, Gary	George, Regina H	Withdrawn by Program	01/25/2017 11:22:35 AM
	Harris, Emma	Withdrawn by Applicant	12/20/2016 03:42:32 PM
	Goku, Son	Withdrawn by Applicant	12/08/2016 02:17:50 PM
Gonzalez, Irvin	Naga, vijay	Withdrawn by Program	11/21/2016 11:46:05 AM
Gonzalez, Irvin	Naga, vijay	Reinstated by Program	11/21/2016 11:46:02 AM
Mathew, Diana	MUNTUN, BLAKENSHIP	Reinstated by Program	11/14/2016 08:50:10 AM

Data Filters

These are the default Data Filter preferences for your program. You may accept or change the fields selection. They were last changed on 11/07/2016 10:21:41 AM by S. Winningham

Screened	Viewable
----------	----------

ERAS Notices

Page 1 of 2

[Test Notice ERASSEND](#) 04/11/2017
[Test Notice ERASSEND](#) 04/11/2017
[test message 1](#) 04/11/2017

PDWS Updates

Your print job status has... 3/20/2017 05:25:05 PM.

Application Activity

Start: Mon, Sep 01, 2014 09:33 AM
End: Mon, May 23, 2016 09:33 AM
☐ Limit results to currently filtered applicants
Update Results


Reports

Name :
Applicants Selected to Honor Societies

Residency Management System (RMS)

ERAS has collaborated with E*Value, New Innovations, Medhub, Medtrics, and MyEvaluations.com to enable you to easily transfer applicant, placement, and performance data seamlessly from the PDWS. Institutional Super Users (ISU) or Alternate Institutional Super Users (AISU), may select the use of a residency management system (RMS) for programs at their institution. They can either select one vendor for all programs or different ones for each program. Go to the Set-Up tab and click on RMS Vendor to make the selections. ISU/AISUs can edit this information at any time.

Programs are able to view which RMS vendor their DIO/DME has chosen for their program on their Dashboard.

Residency Management System (RMS) 

ERAS has collaborated with E*Value, MedHub, MyEvaluations.com, New Innovations, and Medtrics to enable you to easily transfer applicant, placement, and performance data seamlessly from the PDWS. The Designated Institutional Official (DIO)/ Director Medical Education (DME) for your program has not selected the use of any residency management system (RMS).

Please contact your DIO/DME to update this information. Access to these data for transfer into your RMS will remain available until the end of your application season, May 31, 2017.

For more detailed instructions on how to authorize the use of RMS and mark Will Start applicants visit: https://www.aamc.org/download/456704/data/rms_isu_psu_instructions.pdf

Data Filters Panel

The Data Filters panel displays data items which can be screened (hidden) or viewable during the application process. Click the Manage Data Filter icon located in the upper right corner of the panel to navigate to Data Filters in **Setup**. Only Super Users are able to modify this setting and it will apply to all applicants.

Data Filters	
These are the default Data Filter preferences for your program. You may accept or change the fields selection. They were last changed on 11/07/2016 10:21:41 AM by S.Winningham	
Screened	Viewable
Visa Status	Birth Date
	Birth Place
	Citizenship
	Felony Conviction
	Gender
	Limitations
	Misdemeanor Conviction
	Photograph

Favorite Filters Panel

The Favorite Filters panel displays the filter(s) each user has marked as favorite(s), indicated with a star icon. Click a filter name to run the filter and display results. The name and date of the last filter applied appears above the list of filters. The View button displays the results of the last filter applied, and the Refresh button runs the filter again to incorporate new data or changes.

Favorite Filters (5) ?	
Last run filter: Foreign Graduates 01/14/2015 12:04:14 PM View Refresh	
★ All Applicants	★ UD - Scores above 200
★ US Osteopathic Graduates	★ USMLE Received
★ Will start	

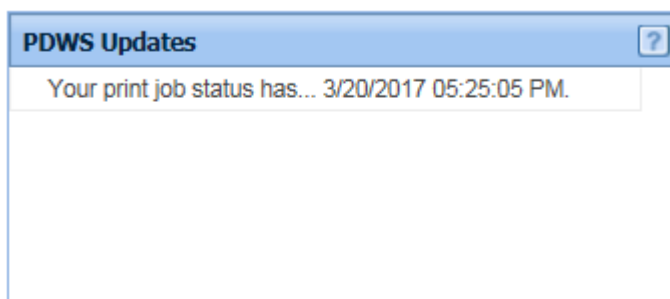
ERAS Notices Panel

The ERAS Notices panel contains ERAS official messages. These notices can include software upgrades or other system information. It is important to read the notices immediately and follow any instructions provided. Notices are listed in reverse chronological order with unread messages in bold.

ERAS Notices ?	
⏪ ⏩ Page <input type="text" value="1"/> of 1 ⏴ ⏵ 🔄	
Dec Fellowship Programs	08/07/2014
ERAS Notice	07/07/2014

PDWS Updates Panel

The PDWS Updates panel is a log of recent activity related to actions performed within the program, including print jobs, exports, invitations that have expired, data filter changes, roles that have been revoked, etc.



Application Activity Panel

The Application Activity panel shows the number of changes per document that have taken place within a specified date range. Click the document name to view the application, or click the View Details link to view a PDF listing more detailed activity.

Application Activity ?

Start: Tue, Jul 01, 2014 01:42 PM

End: Fri, Aug 15, 2014 01:42 PM


☐ Limit results to currently filtered applicants

Update Results

Document/Status	# of Changes
LoR	46
PD LoR	9
MSPE	8

[View Details >](#)

Reports Panel

The Reports panel displays a list of reports chosen to display from Setup. Click the Manage Reports icon () to navigate to Reports in Setup in order to change which reports appear on this list.

Reports ? 

Name :

- [Applicant Roster](#)
- [Applicants Applying as a Couple](#)
- [Applicants Selected to Honor Societies](#)
- [Withdrawn Applicants](#)
- [Missing Documents](#)

Applications

Use the Applications tab to:

- View an application and all related documents.
- Run or create filters to view applicants that meet specified criteria.
- Identify the status of the application.
- Enter information to evaluate the applicant as the workflow progresses.

When the Applications tab is selected, the first applicant from the last filter ran displays. The header panel details information about the applicant, and directly below the header are six tabs: Personal, Education, Experience, Publications, Exams/Licenses, and Limiting Factors.

Note: SOAP participating programs will see additional SOAP fields along with a light bulb (💡) indicator next to the applicants who applied to the program during SOAP. There will also be an additional indicator next to the tracks the applicant applied to during SOAP.

The screenshot displays the ERAS 2018 Program Director's Workstation interface. At the top, the header includes the ERAS and AAMC logos, and navigation links for AAMC.ORG, MY ACCOUNT, MESSAGE CENTER (0), and SIGN OUT. Below the header is a navigation bar with tabs: Dashboard, Applications (selected), Scheduler, Rankings, Reports, Setup, and Program Messages(0). Under the Applications tab, there are sub-links: Manage Filters, View Current Results, View Applications (selected), and Exports. A breadcrumb trail shows 'Designated Institutional Official > All Groups > Family Medicine'. The main content area shows the profile for 'Carlsson, Gloria', identified as 'Applicant 2 of 7'. The profile includes a user's Ad Hoc last executed time (Tue Jun 02 16:58:27 EDT 2015) and navigation links (Previous, Back to Results, Next). The profile is divided into sections: Application (AAMC ID: 14062652, Applicant Applied: 3/08/2015, e-mail: pdwspilot@aamc.org, Preferred Name, Preferred Phone: (202) 111 - 2222), Assignment Information (Assigned To: edit), Education (Medical School: Karolinska Institutet Medicinska Fakulteten, Most Recent Residency: None), and Track(s) (Tracks Applied by Applicant: Family Medicine|9999120C0 (Categorical), Tracks added by Program: edit, PGY2 Interest). To the right, the 'Documents' section shows a list of documents: MyERAS Application, Curriculum Vitae, Medical School Transcript, and MSPE, all dated 03/08/2015. Below the documents are buttons for 'Add Local Document' and 'Upload'. At the bottom, there are two panels. The left panel shows tabs for Personal, Education, Experience, Publications, Exams/Licenses, and Limiting Factors (selected). The 'Limiting Factors' section contains two questions: 'Are you able to carry out the responsibilities of a resident or fellow in the specialties and at the specific training programs to which you are applying, including the functional requirements, cognitive requirements, interpersonal and communication requirements, and attendance requirements with or without reasonable accommodations?' (Screened) and 'Have you ever been convicted of a misdemeanor?' (Screened). The right panel shows tabs for Status, Interviews, Reviewers, and Communication (selected). The 'Reviewers' section shows a list of scores: Composite Score - 0, Board Scores, Documents Scores, Interview Scores, Reviewer Scores, and Custom Score(s), each with a dropdown arrow.

Header Panel

The Header panel provides information about the applicant, such as AAMC ID, phone number, email address, date the application was received, the most recent medical school and the most recent residency.

The track(s) applied by the applicant also appears in the header panel. Program Super Users or Program Coordinator(s) 1 can update tracks by using the edit link next to Tracks considered by Program.

Crenshaw, Herbert JC	
User's Ad Hoc last executed Mon Feb 22 16:20:25 EST 2016	

	Crenshaw, Herbert JC	
	[-] Application	
	AAMC ID: 21028783	Applicant Applied: 5/13/2014
	AOA ID:	e-mail: pdwspilot@aamc.org
	Preferred Name:	Preferred Phone: (301) 301 - 4301
[-] Assignment Information		
Assigned To: edit		
[-] Education		
Most Recent Medical School: Chicago College of Osteopathic Medicine of Midwestern University		
[-] Track(s)		
Tracks Applied by Applicant:		
Residency (Osteopathic)		
Tracks Considered by Program: edit		
Residency (Osteopathic)		

Status Types

Applicant Status

An applicant’s location in the selection process is determined by their status. There are four status groupings:

- Application Status
- Interview Status
- Ranking Status
- Custom Status


You can create any type of user-defined grouping status from the Setup tab. All statuses are filterable.

To Update a Status for One Applicant:

1. Click the **Status** tab on the Evaluate Application section.

Crenshaw, Herbert JC
?

User's Ad Hoc last executed Mon Feb 22 16:20:25 EST 2016
Applicant 8 of 37 | [Previous](#) | [Back to Results](#) | [Next](#)



Crenshaw, Herbert JC

Application

AAMC ID: 21028783 Applicant Applied: 5/13/2014
AOA ID: e-mail: pdvspilot@aamc.org
Preferred Name: Preferred Phone: (301) 301 - 4301

Assignment Information

Assigned To: [edit](#)
Education
Most Recent Medical School: Chicago College of Osteopathic Medicine of Midwestern University
Track(s)

Tracks Applied by Applicant:

Residency (Osteopathic)
Tracks Considered by Program: [edit](#)
Residency (Osteopathic)

Documents

Name	Date
ERAS(4)	
MyERAS Application	05/13/2014
Curriculum Vitae	05/13/2014
Medical School Transcript	02/16/2015
Personal Statement	03/04/2015
Board Transcripts(1)	

Add Local Document

Personal | Education | Experience | Publications | Exams/Licenses | **Limiting Factors**

Limiting Factors

Are you able to carry out the responsibilities of a resident or fellow in the specialties and at the specific training programs to which you are applying, including the functional requirements, cognitive requirements, interpersonal and communication requirements, and attendance requirements with or without reasonable accommodations?
Yes

Have you ever been convicted of a misdemeanor?
No

Have you ever been convicted of a felony?
No

Status | Interviews | Reviewers | Communication

Attributes | Notes | Scores

Application Status

Status	Date
<input type="checkbox"/> Application Reviewed	
<input type="checkbox"/> On Hold	
<input type="checkbox"/> Incomplete Application	
<input type="checkbox"/> Complete Application	
<input type="checkbox"/> Inactive	
<input type="checkbox"/> Withdrawn by Program	
<input type="checkbox"/> Withdrawn by Applicant	
<input type="checkbox"/> Will Start	

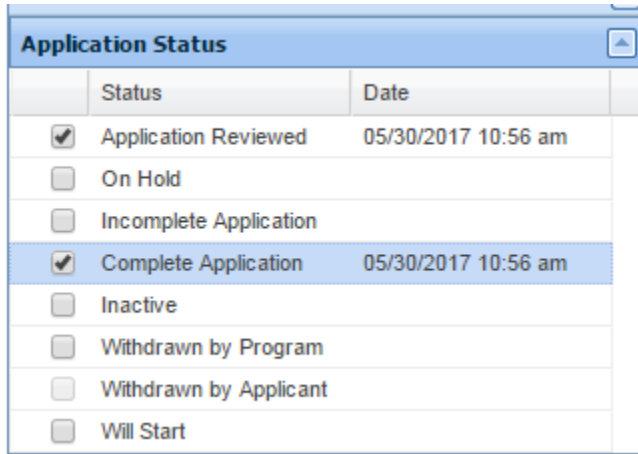
Interview Status

Ranking Status

Custom Status

Status	Date
--------	------

2. Select any of the appropriate statuses that will save the changes with the date and time stamp.
 - To update statuses for multiple applicants together, use Bulk Actions after you run a filter.

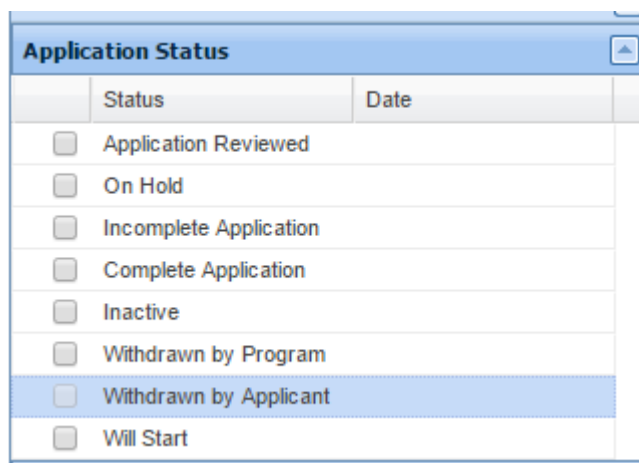


	Status	Date
<input checked="" type="checkbox"/>	Application Reviewed	05/30/2017 10:56 am
<input type="checkbox"/>	On Hold	
<input type="checkbox"/>	Incomplete Application	
<input checked="" type="checkbox"/>	Complete Application	05/30/2017 10:56 am
<input type="checkbox"/>	Inactive	
<input type="checkbox"/>	Withdrawn by Program	
<input type="checkbox"/>	Withdrawn by Applicant	
<input type="checkbox"/>	Will Start	

Application Status

The application status indicates where the current application stands in the overall process. Program Super Users, Alternative Program Super Users, Program Coordinators 1, Reviewer_Interviewer and Reviewer_Interviewer Limited Access can update all application statuses except for:

- Withdrawn by Applicant – this action takes place in MyERAS and is updated in the PDWS.



	Status	Date
<input type="checkbox"/>	Application Reviewed	
<input type="checkbox"/>	On Hold	
<input type="checkbox"/>	Incomplete Application	
<input type="checkbox"/>	Complete Application	
<input type="checkbox"/>	Inactive	
<input type="checkbox"/>	Withdrawn by Program	
<input type="checkbox"/>	Withdrawn by Applicant	
<input type="checkbox"/>	Will Start	

Interview Status

The interview status indicates where in the interview process the current applicant stands. PDWS auto-updates all interview statuses following a triggering action in the Scheduler tab except for Selected to Interview and Invited Privately statuses. Marking an applicant as Selected to Interview will add the applicant into the Scheduler module.

Interview Status		
	Status	Date
<input checked="" type="checkbox"/>	Selected to Interview	04/26/2017 02:10 pm
<input type="checkbox"/>	Invited to Interview	
<input type="checkbox"/>	Invited Privately	
<input type="checkbox"/>	Waitlisted for Interview	
<input type="checkbox"/>	Scheduled for Interview	
<input type="checkbox"/>	Declined	
<input type="checkbox"/>	Interviewed	

Ranking Status

The Ranking status indicates whether the applicant has been selected to be ranked or has been ranked. There are two status types for ranking:

- **Selected for Ranking** – this status must be changed on the applicant header or on the Scheduler tab. When this status is chosen, the applicant’s name becomes available for ranking in the Rankings module.
- **Ranked** – once an applicant is assigned a rank number within the Rankings module, the applicant will automatically be marked with the Ranked status.

Ranking Status		
	Status	Date
<input checked="" type="checkbox"/>	Selected for Ranking	04/20/2016 04:48 pm
<input checked="" type="checkbox"/>	Ranked	04/20/2016 04:48 pm

Custom Status

Custom statuses can be created in Setup.

Note: Status values that are triggered by the system cannot be changed, including Withdrawn

by Applicant, Ranked, and most Interview statuses.

Assigned Applicants

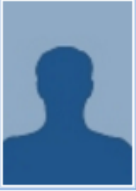
All Reviewers_Interviewers users can only view applicants whom they are assigned or scheduled to interview. Reviewers_Interviewers and Reviewers_Interviewers Read-Only can run system and user-defined filters, but the Reviewers_Interviewers Limited Access users do not have access to filters.

Program Super Users and Program Coordinators 1 can assign applicants by using the 'Assign Applicants' option available in the Applications page. Applicants can also be assigned as a bulk action from 'View Current Results' page after running a filter.

To Assign One or More Users to an Applicant:

1. In the Header panel, click the **edit** link for the Assigned To: row.

Crenshaw, Herbert JC
User's Ad Hoc last executed Mon Feb 22 16:20:25 EST 2016



Crenshaw, Herbert JC

Application
AAMC ID: 21028783 Applicant App
AOA ID: e-mail:
Preferred Name: Preferred Phon

Assignment Information
Assigned To: [edit](#)

Education
Most Recent Medical School: Chicago Colle

Track(s)
Tracks Applied by Applicant:
Residency (Osteopathic)
Tracks Considered by Program:[edit](#)
Residency (Osteopathic)

Assign User(s)

- ☐ Gonzalez, Irving
- ☐ Huq, Tanveer
- ☐ Kazmi, Salman
- ☐ Lee, Gary
- ☐ Io, pa
- ☐ Nelson, Jennifer
- ☐ Pred, Stephen
- ☐ Solomakos, Kyriakos

Personal Education Experience Publications Exams/Licenses **Limiting Factors**

Limiting Factors

Are you able to carry out the responsibilities of a resident or fellow in the specialties and at the specific training programs to which you are applying, including the functional requirements, cognitive requirements, interpersonal and communication requirements, and attendance requirements with or without reasonable accommodations?

Yes

Have you ever been convicted of a misdemeanor?

No

Have you ever been convicted of a felony?

No

2. Select the user(s) to assign to the applicant.
3. Click the **X** button to save the selections and close the light box.

Note: The Reviewer_Interviewer users will now gain access to the applicant’s application when they log into the PDWS.

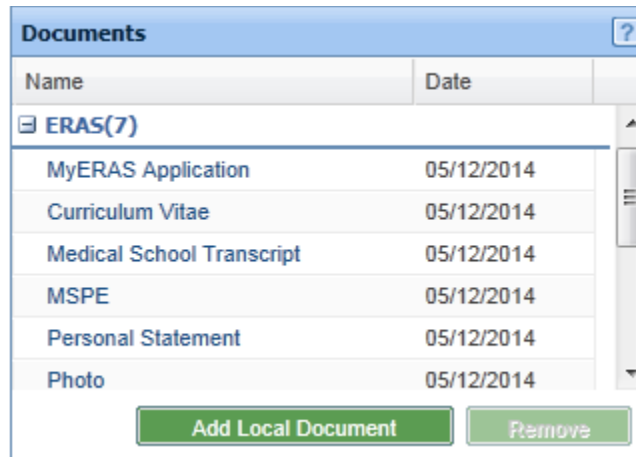
Applicant Tabbed Panel The Applicant tabbed panel is divided into six tabs to help short-list the applicant pool.

Personal		Education	Experience	Publications	Exams/Licenses	Limiting Factors
Personal Information				Citizenship and Visa Information		
Gender	Screened			Birthplace	Screened	
Self-Identity	Screened			Citizenship	U.S. Citizen	
Birth date	Screened					
Current Address				Permanent Address		
Street	2301 Collins Ave Apt 543			Street	11572 S. Lakerun Rd.	
City	Brooklyn			City	Brooklyn	
State	New York			State	New York	
Zip	02118			Zip	48124	
Country	United States of America			Country	United States of America	
Contact Numbers				Match Information		
Preferred	(202) 832 - 1176			Plans to Participate in NRMP Match		
Permanent	(202) 862 - 1147			yes		
Service Obligations						

Personal	Summary and general information including screened information
Education	Applicant's educational background
Experience	Applicant's work experience including volunteer, research and work experience
Publications	List of applicant’s publications
Exams/ Licenses	List of exams taken by applicant along with a list of licenses received
Limiting Factors	Misdemeanor/felony question

Documents

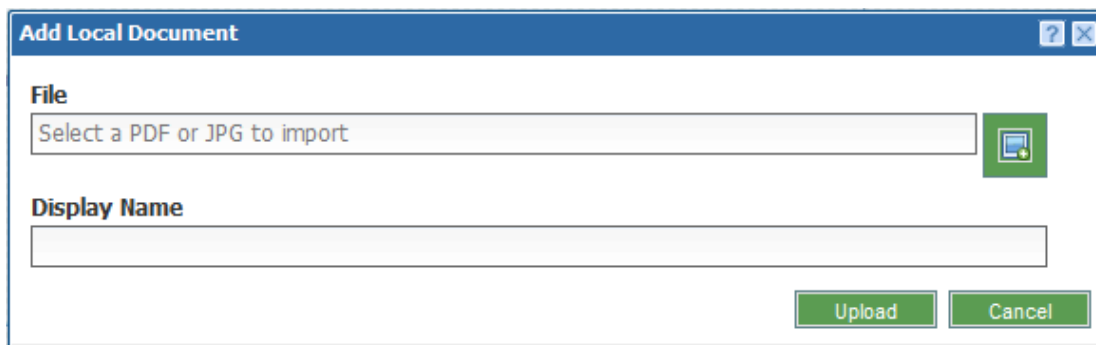
The Documents panel displays documents received from MyERAS, the designated dean’s office, and national boards. Use the Document panel to upload local documents for a specific applicant.



A local document is any document not included in the MyERAS application, but may be required by the program. For example, programs interested in research may ask applicants who have published peer-reviewed articles to provide a copy of the article before or during an interview. Keep in mind attached local documents will need to be printed individually and will not be included when printing an applicant’s application.

To Add a Local Document:

1. In the Applications tab, on the Documents panel, click the **Add Local Document** link.

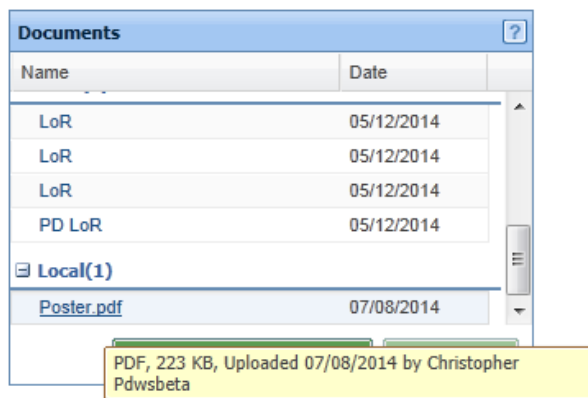


2. Click the icon to select a file to import.
3. Locate and select a file from the choose file to upload window.

- Only JPG and PDF file types are supported.
4. Click the **Open** button or double-click the file
 5. If desired, enter a Display name for the file.
 6. Click the **Upload** button.
 7. Click the **OK** button.

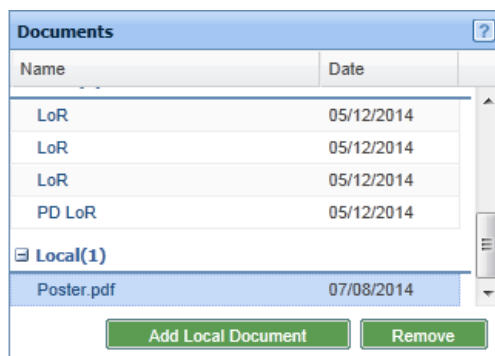
To View a Local Document:

- In the Applications tab, on the Documents panel, scroll to the bottom and click the name of the document to view the file. Keep in mind local documents will not be included when printing the applicant’s documents to PDF or in Archive files.



To Remove a Local Document:

1. In the Applications tab, on the Documents panel, select the file to remove.
 - Click anywhere in the row, but not the document name. If the document name is clicked, the document will open.



2. Click the **Remove** button.

3. Click the **Confirm** button to remove the document.

Evaluate Applicant Panel

This tabbed panel holds information about the applicants as they move through the evaluation process. This panel consists of seven tabs:

- Status
- Interviews
- Reviewers
- Communication
- Attributes
- Notes
- Scores

Status	Interviews	Reviewers	Communication
Attributes Notes Scores			
?			
Application Status			
	Status	Date	
<input checked="" type="checkbox"/>	Application Reviewed	05/30/2017 04:08 pm	
<input type="checkbox"/>	On Hold		
<input type="checkbox"/>	Incomplete Application		
<input checked="" type="checkbox"/>	Complete Application	05/30/2017 04:08 pm	
<input type="checkbox"/>	Inactive		
<input type="checkbox"/>	Withdrawn by Program		
<input type="checkbox"/>	Withdrawn by Applicant		
<input type="checkbox"/>	Will Start		
Interview Status			
	Status	Date	
<input checked="" type="checkbox"/>	Selected to Interview	10/02/2015 12:28 pm	
<input type="checkbox"/>	Invited to Interview		
<input checked="" type="checkbox"/>	Invited Privately	05/30/2017 04:08 pm	
<input type="checkbox"/>	Waitlisted for Interview		
<input type="checkbox"/>	Scheduled for Interview		
<input type="checkbox"/>	Declined		
<input checked="" type="checkbox"/>	Interviewed	12/30/2015 02:40 pm	
<input type="checkbox"/>	Scheduled prank		
Ranking Status			
	Status	Date	
<input checked="" type="checkbox"/>	Selected for Ranking	04/20/2016 04:48 pm	
<input checked="" type="checkbox"/>	Ranked	04/20/2016 04:48 pm	
Custom Status			
	Status	Date	

Interviews

An interviewer evaluates an applicant after they have been interviewed. Interviewer comments and scores may have a significant impact on the final ranking. Based on roles, different system permissions are available when entering interview comments and scores into PDWS.

- All Interviewers only see applicants with whom they are scheduled.
- Reviewer_Interviewer and Reviewer_Interviewer Limited Access can enter, modify, and view only their own comments/scores for interviews they conducted.
- Program Super Users, Alternative Program Super Users, and Program Coordinators 1 can enter, modify, and view comments/scores for all of the interviewers, including user- defined interviewers in their program.
 - Note: A user-defined interviewer is a user who will **not** need to access the PDWS. Users can schedule an event and record scores/comments for user-

defined interviewers.

Interviewer Tasks (performed by Reviewer_Interviewer and Reviewer_Interviewer Limited Access):

- Enter interview comments
- Enter and publish a score to the interview
- Update applicant’s interview status

To Enter Interviewer Comments and Scores:

1. In the Applications tab, select the Interviews tab.
 - PDWS displays the interview date/time from the Scheduler and provides areas to enter score and interview comments.
2. Click the box beneath Score to enter a numeric score value.
3. Click the **+** sign next to the Interviewer name to open the comment box.
4. Enter comments, up to a maximum of 4000 characters.
5. Select **Save** or **Publish**.

- Comments/scores that are Saved are viewable only by the user who entered them (e.g., Interviewer, Program Coordinator).
- Comments/scores that are Published are viewable by the user who entered them, Program Super Users, and Program Coordinators. Published scores are also automatically calculated into the total and average interview score.

6. Click **Unpublish** to remove the scores/comments from the total and average interview score.

Note: Scores and comments entered by Reviewer_Interviewer users are no longer available for Program Super Users and Program Coordinators once they’ve been unpublished.

Reviewers

A reviewer evaluates an applicant after they have reviewed the applicant documents. Reviewer comments and scores can get added to the Composite Score calculation and may have a significant impact on the final ranking. Based on roles, different system permissions are available when entering review comments and scores into PDWS.

- Reviewer_Interviewer and Reviewer_Interviewer Limited Access can enter, modify, and view their own comments/scores for reviews they conducted.
- Program Super Users, Alternative Program Super Users, and Program Coordinators 1 can enter, modify, and view comments/scores for all of the reviewers.
- All Reviewers only see applicants with whom they are assigned.

Reviewer Tasks (performed by Reviewer_Interviewer and Reviewer_Interviewer Limited Access):

- Enter review comments
- Apply a score based on the review conducted
- Save/Publish/Unpublish the scores/comments

The screenshot displays the 'Reviewers' tab in the ERAS 2018 interface. It features a table with two columns: 'Reviewer' and 'Score'. The first entry is 'Alistair Campbell' with a score of '50'. Below the table, there is a text area for comments, which currently contains the text 'Reviewed the documents, transcripts'. At the bottom of the interface, there is a status bar indicating '3,965 characters left' and four buttons: 'Save', 'Publish', 'Unpublish', and 'Cancel'.



To Enter Reviewer Comments and Scores:

1. In the Applications tab, select the Reviewers tab.
 - PDWS displays the Reviewers based on the assignment information and provides areas to enter score and review comments.
2. Click the box beneath Score to enter a numeric score value.
3. Click the + sign next to the Interviewer name to open the comment box.
4. Enter comments, up to a maximum of 4000 characters.
5. Select **Save** or **Publish**.
 - Comments/scores that are Saved are viewable only by the user who entered them (e.g., Reviewer, Program Coordinator).
 - Comments/scores that are Published are viewable to Program Super Users and Program Coordinators.
6. Click **Unpublish** to remove the scores/comments from the total and average Reviewer score.

Note: Scores and comments entered by Reviewer_Interviewer users are no longer available for Program Super Users and Program Coordinators once they’ve been unpublished.

Communication

Communication records are used to document any contact with the applicant. There are four types of communication records and each is associated with an icon: e-mail, Phone, Fax, and Other. Messages sent or received through the PDWS are automatically noted in the Communication tab and cannot be edited.

Status	Interviews	Reviewers	Communication
Attributes	Notes	Scores	
	Subject	Type	Date
	Interview		08/31/15

To Sort the Communication:

- Click a column heading.

To Add a Communication Record:

- In the Applications tab, select the Communication tab.
- Click the **Add** button.
- Select the type of communication.

Select Communication Type

Please select a communication type:
☐ e-mail
☐ Phone
☐ Fax
☐ Other

- Enter the appropriate information.

Add e-mail Communication

From
Abdalwhhab, Kyungsoo

To

Subject
This is a required field

Date
05/02/2014

Time
▼

Message

8000 characters left

Upload
Select a PDF or JPG to import

5. Click the **Add** button when finished.

To Attach a Document to a Communication Record:

1. While in the Add Communication light box, click the icon in the Upload section.
 - The Phone communication type does not offer an upload option.
2. Locate and select the file to attach.
 - Only one file can be attached to a communication record and the file type must be .pdf or .jpg.
3. Click the **Open** button or double-click the file.
4. Select whether the attachment should appear in Local Documents area of the Documents panel.
5. Click the **Add** button when finished.
 - A paperclip icon indicates the communication has an attachment.
 - Attachments can be viewed and printed.

To Edit a Communication Record:

1. Select the record to edit by clicking the subject hyperlink.
2. Click the **Edit** button.
3. Make the necessary changes.
4. Click the **Save** button.

To Delete a Communication Record:

1. Select the record to delete by clicking the subject hyperlink.
2. Click the **Delete** button.
3. Click the **Yes** button to confirm the deletion.

Note: You cannot edit or delete any messages sent to or from the PDWS.

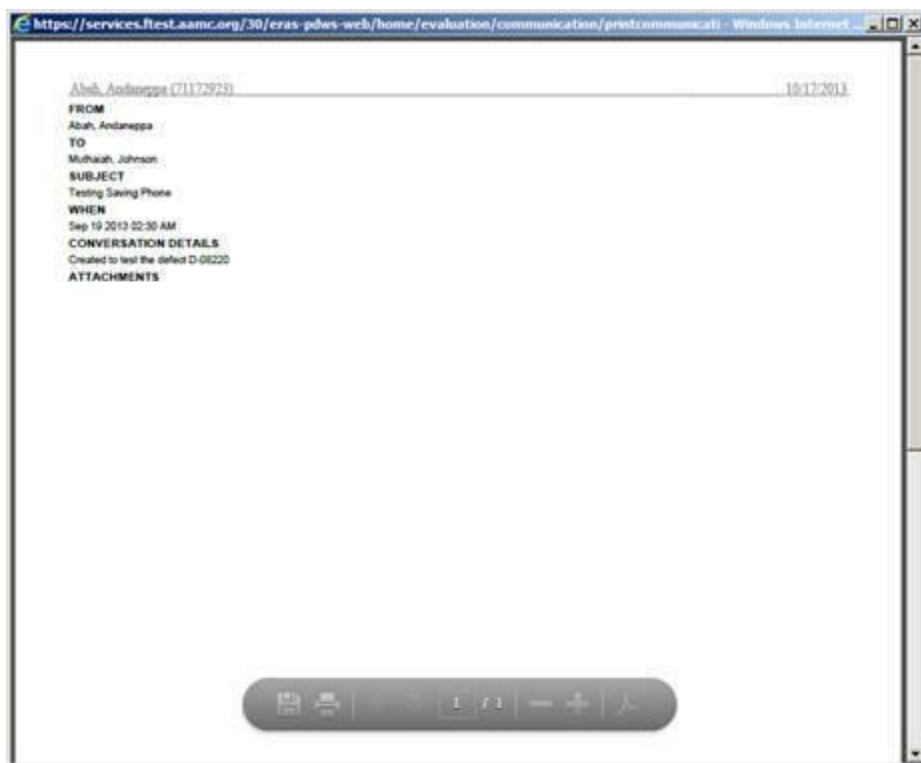
To Print the Communication History Log:

1. Select the record to view by clicking the subject hyperlink.



2. Click the **Print** icon at the top right of the light box.
 - A PDF of the report appears in Adobe Reader. The Adobe Reader toolbar offers buttons for saving, printing, navigating, and zooming the PDF report.
 - Visit <http://helpx.adobe.com/reader/using/save-view-search-pdfs.html> for help on how to use Adobe Reader.









3. Click the **Print** button.
4. Select the desired print options, and then click the **Print** button.

Attributes

An attribute is a data field specific to a program which was not captured by any other ERAS documents. Attributes help narrow the pool of applicants. Once an attribute is defined by the Program Super User, Alternate Program Super User, or Program Coordinator 1 in Setup, it is viewed in the Attributes tab.

The screenshot shows the 'Attributes' tab selected in a navigation bar at the top, which also includes 'Interviews', 'Communication', 'Notes', and 'Scores'. Below the navigation bar is a blue header for 'Qualifying Experience' with a help icon. The text 'No Medical Experience Reported.' is displayed. Below this is another blue header for 'Other Attributes'. Underneath, there are four unchecked checkboxes: 'Away Rotations', 'Urban Experience', 'Prior Applicant', and 'Rank Applicants 1'. Further down, there is a 'Lodging' section with a dropdown menu, and a 'Med School Grades' section with a dropdown menu.

Interviews	Communication	Attributes	Notes	Scores
Qualifying Experience ?				
No Medical Experience Reported.				
Other Attributes				
<input type="checkbox"/> Away Rotations				
<input type="checkbox"/> Urban Experience				
<input type="checkbox"/> Prior Applicant				
<input type="checkbox"/> Rank Applicants 1				
Lodging				
<input type="text"/> ▼				
Med School Grades				
<input type="text"/> ▼				

Status	Interviews	Reviewers	Communication
Attributes	Notes	Scores	
?			
Qualifying Experience			
No Medical Experience Reported.			
Other Attributes			
<input type="checkbox"/> Away Rotations <input type="checkbox"/> Urban Experience			
Preference			
<input type="text"/>			
Local Applicant			
<input type="text"/>			
Start Date			
<input type="text"/> 			
End Date			
<input type="text"/> 			
Med School Grades			
<input type="text"/> 			
Designations			
<input type="text"/> 			

Examples:

- A piece of information that is required by a particular state in which the residency is located.
- A list of hotels where applicants will be staying during the interview.

Note: Qualifying Experience is a default in the Attributes tab – this refers to whether or not an applicant’s prior experience (e.g., as a resident or some other position) qualifies him/her for the program to which they are applying. It is the program that determines the applicant’s previous experience(s) as qualifying experience, which the program can then use to filter on.

To Update an Attribute:

1. In the Applications tab, select the Attributes tab.
2. Enter any relevant information.
 - Changes are saved automatically.
 - Use the Bulk Actions to update attributes for multiple applicants.

Notes

Notes are used to share information about applicants. Each note contains a header row that lists the user who entered the note along with the date and time the note was entered. Notes are organized in reverse chronological order with the newest note displayed first. Comments can be entered in response to a note, allowing for a threaded conversation among users.

To Enter a Note:

1. In the Applications tab, click the Notes tab.
2. Click in the **Type a new note here** text box.
3. Enter a note with a maximum of 4000 characters
 - Click the **Spell Check** button to spell check.
4. Click the **Save** button when finished entering the note.
 - Only the first two lines of a note display. Click the **more** link to expand the note.

To Edit a Note:

1. Click the **Pencil** icon next to the note.
2. Make desired changes.
3. Click the **Save** button.

To Delete a Note:

1. Click **Delete** icon (X) next to the note.
2. Click the **Yes** button to confirm the deletion.
 - All comments associated with the note will also be deleted.

To Enter a Comment on a Note:

1. Click the **+ Add Comment** link below the note.
2. Enter a comment with a maximum of 2000 characters.
 - Click the **Spell Check** button to spell check.
3. Click the **Save** button.
 - Multiple comments can be added to a note.

To Delete a Comment for a Note:

1. Click the **Delete** icon (X) next to the comment to delete.
2. Click the **Yes** button to confirm deletion.

Scores

Scores are a way for a program to apply a numeric value to documents submitted by the applicant. The Scores tab is located on the Applications tab.

Below are terms relevant to the Scores panel.

- Score – an assigned numeric value.
- Weight – a method used to give certain scores more or less importance.
- Composite Score – total of all the scores that were selected to be included in the Scores setup.

There are six default Score type groupings:

- Composite
- Board Scores
- Document Scores
- Interview Scores
- Reviewer Scores
- Custom Scores

Programs can define and configure Score types on the Setup tab.

Note: Document scores and other types of scores cannot be updated using a bulk action.

The PDWS automatically calculates the Average LoR score, the Average Document score, Average Interview score, Total Interview score, and the Composite score.

To Update a Score:

1. Open the score type to update.
2. In the appropriate row, enter the score and click away from the box.

Status	Interviews	Reviewers	Communication
Attributes	Notes	Scores	
?			
Composite Score - 0			
Score Type	Score	Weight	Total
Board Scores			
Documents Scores			
Score Type	Score	Weight	Total
LoR ⓘ	25	x 1.00	25
LoR ⓘ	36	x 1.00	36
LoR ⓘ		x 1.00	
Average LoR ⓘ			30.5
Personal Statement		x 1.00	
Average Document ⓘ			30.5
Interview Scores			
Reviewer Scores			
Custom Score(s)			

Note: Hover over the information icon to display the author’s name, title, and specialty based on information provided in MyERAS. By clicking on the LoR, the document will open in a PDF.

Composite Score

The composite score is the combination of all scores which are selected in Setup. Score weights and which scores to include in the Composite Score are determined in the Setup menu.

Board Scores

USMLE and COMLEX-USA scores display by default. All board scores are system-generated and cannot be changed. If there is a red indicator next to the Board Scores, please open the USMLE or COMLEX-USA transcript to view important information regarding the applicant’s exam history.

Board Scores ⓘ USMLE			
Score Type	Score	Weight	Total
USMLE Step 1	224	x 1.00	224
USMLE Step 2 CK	219	x 1.00	219
USMLE Step 2 CS	Pass		
USMLE Step 3	208	x 1.00	208
COMLEX-USA Level 1		x 1.00	
COMLEX-USA Level 2... ⓘ		x 1.00	
COMLEX-USA Level 2... ⓘ			

Documents Scores

Document scores relate to the documents submitted by the applicant.

Documents Scores			
Score Type	Score	Weight	Total
Personal Statement	<input type="text"/>	x 1.50	
Average Document ⓘ			

- An applicant can have a maximum of four LoRs, which includes a Program Director letter and Dept. Chair LoR.
- Average LoR and Average Document scores are system-generated.
- ABSITE scores are limited to certain surgical fellowship specialties.

Update Document Scores

Only documents submitted by the applicant’s Dean’s office or ECFMG display on the panel. Average LoR and Average Document Value are system-generated; all other scores are entered manually. A user-defined score may be added to the Document Scores in Setup.

Interview Scores

There are two score types displayed on the Interview Scores panel:

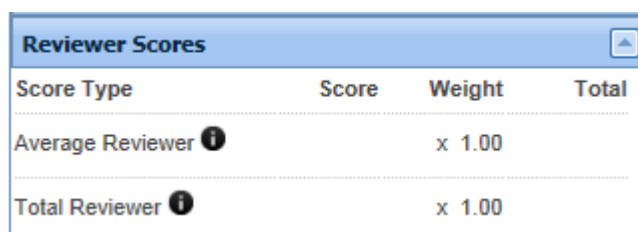
- Average Interview Score (system-generated) – average of interview scores entered by all the interviewers via the Interview.
- Total Interview Score (system-generated) – total of the interview scores entered by all the interviewers.
- A user-defined score may be added to the Interview Scores in Setup, which can be included in the average and total interview score.

Interview Scores			
Score Type	Score	Weight	Total
Average Interview ⓘ		x 1.00	
Total Interview ⓘ		x 1.00	

Reviewer Scores

There are two score types displayed on the Reviewer Scores panel:

- Average Reviewer Score (system-generated) – average of reviewer scores entered by all the reviewers via the Reviewers tab.
- Total Reviewer Score (system-generated) – total of the reviewer scores entered by all the reviewers.
- A user-defined score may be added to the Reviewer Scores in Setup, which can be included in the average and total Reviewer score.



Score Type	Score	Weight	Total
Average Reviewer ⓘ		x 1.00	
Total Reviewer ⓘ		x 1.00	

Custom Scores

Use the Custom Scores panel to view user-defined score groups. Custom scores are created in Setup, and all the score types added in the custom group are updated manually.



Score Type	Score	Weight	Total
Cultural literacy	<input type="text"/>	x 7.00	

Manage Filters

The Manage Filters option on the Applications tab displays existing filters to quickly find applicants who meet a specific set of criteria. The screen is divided into four sections.

- The Favorites panel contains a list of filters that you have marked as favorites.
- The User-Defined panel contains a list of filters that were created by you, by Program Super Users or Program Coordinators. User-defined filters can be deleted if no longer needed.
- The System-Defined panel contains a list of filters created by ERAS staff. These filters cannot be deleted.
- Only Allopathic Residency programs will see the fourth section which includes SOAP system-defined filters.

If an existing filter does not meet your search requirements, refer to instructions on [Creating User-Defined Filters](#) and [Modifying Filters](#).

Designated Institutional Official > All Groups > [Obstetrics and Gynecology](#) [Help](#) | [Bulk Print Requests](#) | [Active Applicants](#) | [History](#)

Add a new filter

Favorites (1)

- ★ Dept. Chair LoR Received

User-Defined (0)

System-Defined (56)

★ 2 LoRs and COMLEX-USA Transcript	★ 2 LoRs and USMLE Transcript
★ 3 LoRs and COMLEX-USA Transcript	★ 3 LoRs and USMLE Transcript
★ 3 LoRs Missing	★ 3 LoRs Received
★ 3 LoRs, MSPE, COMLEX-USA Transcript	★ 3 LoRs, MSPE, USMLE Transcript
★ Active Applicants	★ All Applicants
★ Applicant Applied Date	★ Applicants (excluding Osteopathic) Missing USMLE Transcripts
★ Applicants Assigned	★ Applicants Not Reviewed
★ Applicants Reviewed and Not Selected to Interview	★ Applicants Scheduled for Interview
★ Applicants Where Date Reviewed Precedes Date of Latest Document	★ Applicants with No US or Canadian Residency
★ Applicants with US or Canadian Residency	★ Canadian Graduates
★ COMLEX-USA Missing	★ COMLEX-USA Received
★ Composite Score	★ Current Visa Status

To Mark a Filter as a Favorite:

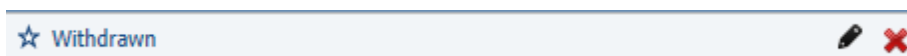
1. Locate the filter in the **User-Defined** or **System-Defined** sections.
2. Click the star icon next to the filter name.
 - Favorite filters are user-specific and will not show as a favorite filter for another user at your program.
 - Once the star icon is clicked, the filter displays in the **Favorites** section in alphabetical order.
 - Click the star icon again to unmark the filter as a favorite and remove it from the Favorites section.

To Run a User-Defined or System-Defined Filter:

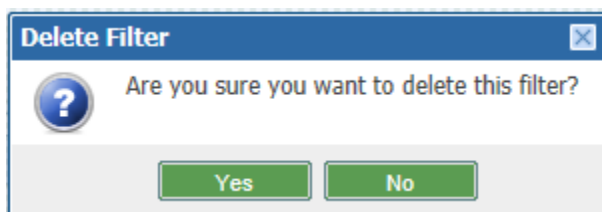
1. Locate the filter in the **User-Defined** or **System-Defined** sections.
2. Click the name of the filter to run it.
 - The Results window will display the filter results.

To Delete a User-Defined Filter:

1. Locate the filter in the **User-Defined** section.
2. Click the **Delete** icon (X).



3. Click the **Yes** button.



- System-defined filters cannot be deleted.

View Current Results

The View Current Results option on the Applications tab displays the Modify Filter Criteria and Results panels. The Modify Filter Criteria panel offers tools to define the search criteria, and the Results panel displays a list of applicants that meet the defined criteria.

Modify Filter Criteria

Results (3 LoRs Missing last executed Tue Aug 04 11:38:22 EDT 2015)

Refine Results

enter value

Refine

Sort By

Page 1 of 1

Select Page

Select All

Display 25

Records per page

Displaying Results 1 - 10 of 10

<input type="checkbox"/>	Applicant Name	AAMC ID	Medical School of Graduation	E-mail Address
<input type="checkbox"/>	forteen, nemo	20020048	University of Arkansas for Medical Sciences College of Medicine	ksubramanian@aamc.org
<input type="checkbox"/>	ICDMil01, ICDMil01	20020352	Uniformed Services University of the Health Sciences F. Edward Hebert School of Medi...	earumugam@aamc.org
<input type="checkbox"/>	Mary, Sudhana SR	20019533	Philadelphia College of Osteopathic Medicine	vrajappan@aamc.org
<input type="checkbox"/>	Perry, Noah Howard JR	20018794	State University of New York Upstate Medical University	arusellian@aamc.org
<input type="checkbox"/>	regression, mdrresident II	20018800	Albert Einstein College of Medicine of Yeshiva University	krajikumar@aamc.org
<input type="checkbox"/>	ten, bill	20018701	University of Toronto Faculty of Medicine	ksubramanian@aamc.org
<input type="checkbox"/>	Thirteen, Benjamin middle IV	20019457	Michigan State University College of Osteopathic Medicine	ksubramanian@aamc.org
<input type="checkbox"/>	twelve, john mid	20019072	Michigan State University College of Osteopathic Medicine	ksubramanian@aamc.org
<input type="checkbox"/>	Warlock, Hitman Owen SR	20018588	State University of New York Upstate Medical University	arusellian@aamc.org
<input type="checkbox"/>	Williamson, Kane AAMC II	20020316	Albert Einstein College of Medicine of Yeshiva University	rkathirvel@aamc.org

Page 1 of 1

Select Page

Select All

Display 25

Records per page

Displaying Results 1 - 10 of 10

Action to perform on selected applicants:

Select a bulk action

Go

Create User-Defined Filters

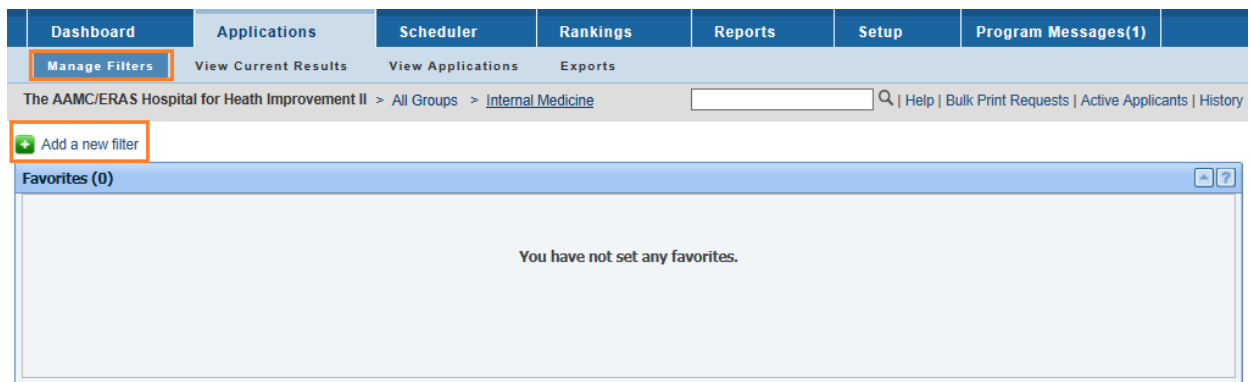
The first task in creating a new filter is planning and deciding the necessary criteria for extracting the correct group of applicants. When creating a filter, choose between the two options to connect different criteria between groups:

- The **AND** connector is the default when adding search criteria – it narrows the search results since the applicants must meet all the criteria specified.
- The **OR** connector must be specified when adding search criteria – it expands the search results since the applicants can meet any of the criteria specified.

User-defined filters can be created from scratch or by starting with criteria from an existing filter. See Modify Filters for instructions on how to add new criteria to an existing filter and save it as new.

Step 1: Start a New Filter

1. Click **Manage Filters** on the Applications tab.
2. Click Add a new filter.



Step 2: Construct the Filter

1. Choose to run the filter for All Applicants or Active Applicants.
2. Click the **Add Group** button to add criteria.

The screenshot shows the 'Modify Filter Criteria' window. Under the 'Applicants Type' header, the 'All Applicants' radio button is selected. A red box highlights the '+ Add Group' button. The 'Apply', 'Save', and 'Clear' buttons are at the bottom right.

3. If necessary, click the delete icons (X) to get rid of any existing criteria.
4. Select the filter relationship of the criteria within the group.
 - ALL – This narrows the results. Applicants must meet all the criteria in that group. This is the default option when adding criteria.
 - ANY – This broadens the results. Applicants can meet any of the criteria in that group.

The screenshot shows the 'Modify Filter Criteria' window with 'Group 1' selected. The 'Show results matching ALL criteria in this group' radio button is selected. A red box highlights the 'Add Criteria' section, which contains a green '+ Add new Criteria' button. The '+ Add Group' button is at the bottom left, and 'Apply', 'Save', and 'Clear' buttons are at the bottom right.

5. Click the **Add new Criteria** button.
6. Select a **Category**, **Field**, **Condition**, and a **Value** for each criterion.
 - To create a filter that prompts for a value when it is run, mark the **Ask User for value at filter run time** check box.
 - A prompt filter must be saved before it can be run.

Criteria Selection

Category: Medical Education Field: Medical School Country Condition: Equals

☐ Ask User for value at filter run time

☒ United States of America

☐ Afghanistan

☐ Aland Islands

☐ Albania

☐ Algeria

Add New Criteria Save Criteria Cancel

- Click the **Add New Criteria** button to add more criteria to the same group.
- In this example, the filter searches for applicants who are U.S. medical school graduates AND have a USMLE Step 1 Score between 190 and 210.

Criteria Selection

Category: Exams Field: USMLE Step 1 Score Condition: In between From 190 To 210

☐ Ask User for value at filter run time

Category: Medical Education Field: Medical School Country Condition: Equals

☐ Ask User for value at filter run time

☒ United States of America

☐ Afghanistan

☐ Aland Islands

☐ Albania

☐ Algeria

Add New Criteria Save Criteria Cancel

- Click the **Delete** icon (X) to delete any criteria.
- When finished specifying criteria, click the **Save Criteria** button.
 - If desired, click the **Add Group** button before applying or saving the criteria to add another group of criteria.

Modify Filter Criteria

Applicants Type

☐ All Applicants ☒ Active Applicants

Group 1

☒ Show results matching ALL criteria in this group

☐ Show results matching ANY criteria in this group

Add Criteria

Medical School Country: Equals: United States of America

USMLE Step 1 Score: In between: 190-210

Add new Criteria

Add Group

Apply Save Clear

- Select the **AND** or **OR** radio button to indicate the relationship between the criteria in Group 1 and the criteria in Group 2.
- Click the **Add new Criteria** button in Group 2.

The screenshot shows the 'Criteria Selection' window with two groups. Group 1 is expanded, showing two criteria: 'USMLE Step 1: Equals: Yes' and 'Medical School Country: Equals: United States of America'. Below these criteria, the 'AND' radio button is selected and highlighted with a red box. Group 2 is collapsed, and its 'Add new Criteria' button is highlighted with a red box.

- Construct the criteria for Group 2, and then save the criteria.

The screenshot shows the 'Criteria Selection' dialog box for Group 2. It has two rows of criteria. The first row is for 'User-Defined Attributes' with the field 'Away Rotations' and condition 'Equals'. The second row is for 'Medical Education' with the field 'Medical School Country' and condition 'Equals'. The 'United States of America' is selected in the list of countries. The 'Save Criteria' button is highlighted with a red box.

- By adding Group 2, this example searches for:
 - 1) Applicants who are U.S. medical school graduates and have a USMLE Step 1 Score between 190 and 210,

OR

 - 2) Applicants who are U.S. medical school graduates and have completed an Away Rotation (a user-defined attribute) at the user’s institution.

- Below is a completely different example showing the use of multiple groups.
This example searches for:

1) Applicants who have complete

applications, AND

2) Applicants who attended a medical school in the District of Columbia,
Florida, or Hawaii.

The screenshot shows the 'Modify Filter Criteria' dialog box. At the top, under 'Applicants Type', the 'All Applicants' radio button is selected. Below this, there are two groups of criteria:

Group 1

- Add Criteria:** A single criterion is listed: 'Complete Application: Equals: Yes'.
- Logic:** The 'Show results matching ALL criteria in this group' radio button is selected.

Group 2

- Add Criteria:** Three criteria are listed: 'Medical School State/Province: Equals: District of Columbia', 'Medical School State/Province: Equals: Florida', and 'Medical School State/Province: Equals: Hawaii'.
- Logic:** The 'Show results matching ANY criteria in this group' radio button is selected.

At the bottom of the dialog, there is an 'AND OR' selector with 'AND' selected. There are also buttons for '+ Add Group', '+ Add new Criteria', 'Apply', 'Save', and 'Clear'.

Step 3: Save the Filter

After creating a new filter, use the Save option and provide a filter name and description. Only the Program Super User, Alternative Program Super User, and Program Coordinator 1 can create and save new filters.

1. In the **Modify Filter Criteria** panel, click the **Save** button.
 - The Clear button is used to clear the current filter without saving.
 - The Apply button is used to run the current filter.

2. Enter a **Name** and **Description**.
 - The name must be unique and between 1 and 100 characters.
 - The description must be between 1 and 500 characters.

3. If desired, select a **Sorted By** option.

- The default sort order for the Filter results grid is first by Applicant Name (last name, first name, middle initial). Then by AAMC ID for Allopathic programs or AOA ID for Osteopathic programs.

4. Click the **Save As New** button.

- The filter now appears under the **Manage Filters** tab in the **User-Defined** panel.



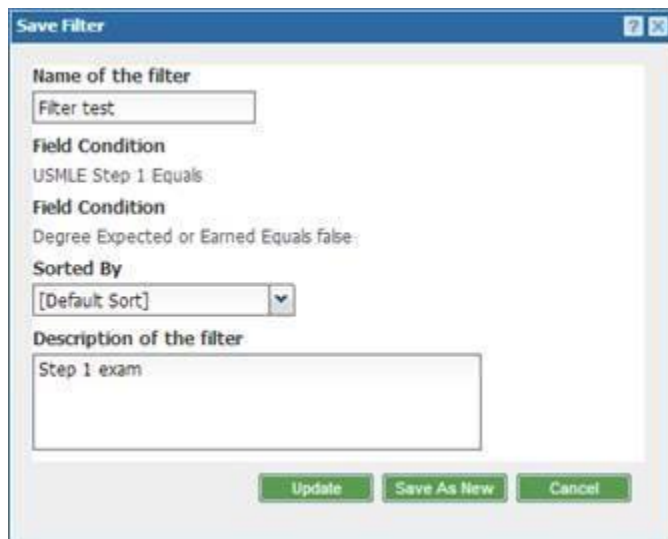
5. Click the filter to apply and display results.

Modify Filters

After running a system or user-defined filter, use the Modify Filter Criteria panel to adjust the criteria. Use the update feature to save changes to the existing filter or save changes as a new filter.

To Modify a Filter:

1. Navigate to **Manage Filters** on the Applications tab.
2. Locate the filter to modify.
3. Click the filter to run it.
4. Expand the **Modify Filter Criteria** panel to view the criteria.
5. Make the necessary changes to the criteria and click the **Save** button.
6. To save and replace the current filter with the new criteria, modify the description if needed, and click the **Update** button.
7. To save as a new filter, enter a different filter name, and click the **Save As New** button.



Save Filter

Name of the filter
Filter test

Field Condition
USMLE Step 1 Equals

Field Condition
Degree Expected or Earned Equals false

Sorted By
[Default Sort]

Description of the filter
Step 1 exam

Update Save As New Cancel

Filter Results

The Results panel displays the applicants that meet the selected criteria. Use the scroll bar or the navigation arrows to view the results. Click the column headings to sort the results in ascending or descending order. Click the applicant name to view the selected applicant’s record. Possible actions include:

- Navigating through the list.
- Sorting the list of applicants.
- Viewing the applications.
- Completing a Bulk Action
- Refining results.
- SOAP participating programs will see a SOAP light bulb indicator next to applicants who applied to their program during SOAP.

Modify Filter Criteria [?] [x]

Results (3 LoRs Missing last executed Tue Aug 04 11:38:22 EDT 2015) [?] [x]

Refine Results [v] enter value Refine Sort By [v]

Page 1 of 1 | Select Page | Select All Display 25 Records per page Displaying Results 1 - 10 of 10

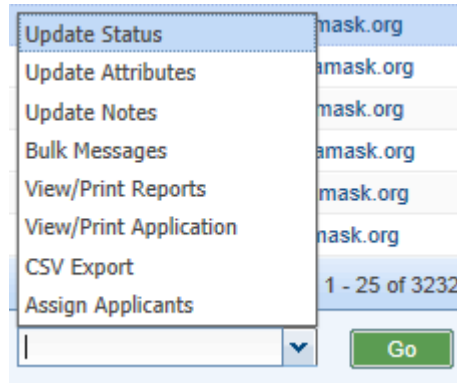
<input type="checkbox"/>	Applicant Name	AAMC ID	Medical School of Graduation	E-mail Address
<input type="checkbox"/>	forteen, nemo	20020048	University of Arkansas for Medical Sciences College of Medicine	ksubramanian@aamc.org
<input type="checkbox"/>	ICDMII01, ICDMII01	20020352	Uniformed Services University of the Health Sciences F. Edward Hebert School of Medi...	earumugam@aamc.org
<input type="checkbox"/>	Mary, Sudhana SR	20019533	Philadelphia College of Osteopathic Medicine	vrajappan@aamc.org
<input type="checkbox"/>	Perry, Noah Howard JR	20018794	State University of New York Upstate Medical University	arusellian@aamc.org
<input type="checkbox"/>	regression, mdresident II	20018800	Albert Einstein College of Medicine of Yeshiva University	krajikumar@aamc.org
<input type="checkbox"/>	ten, bill	20018701	University of Toronto Faculty of Medicine	ksubramanian@aamc.org
<input type="checkbox"/>	Thirteen, Benjamin middle IV	20019457	Michigan State University College of Osteopathic Medicine	ksubramanian@aamc.org
<input type="checkbox"/>	twelve, john mid	20019072	Michigan State University College of Osteopathic Medicine	ksubramanian@aamc.org
<input type="checkbox"/>	Warlock, Hiltman Owen SR	20018588	State University of New York Upstate Medical University	arusellian@aamc.org
<input type="checkbox"/>	Williamson, Kane AAMC II	20020316	Albert Einstein College of Medicine of Yeshiva University	rkathirvel@aamc.org

Page 1 of 1 | Select Page | Select All Display 25 Records per page Displaying Results 1 - 10 of 10

Action to perform on selected applicants: Select a bulk action [v] **Go**

Bulk Actions

Bulk Actions can be performed after applying a filter and selecting one or more applicants. The following choices are available in the Bulk Actions drop-down list at the bottom of the Results panel (by Program Super User, Alternative Program Super User, and Program Coordinator 1):



Reviewers_Interviewers also have access to bulk actions:

- Reviewers_Interviewers can View/Print Application.
- Only Reviewers_Interviewers and Reviewers_Interviewers Limited Access, can perform Update Status, Update Attributes and Update Notes.
- Only Reviewers_Interviewers and Reviewers_Interviewers Read-Only, can perform View/Print Reports.

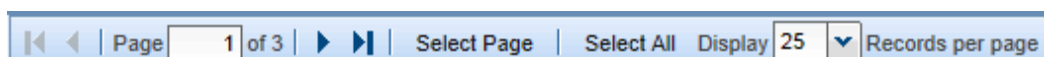
Note: At least one applicant must be selected to view the Bulk Actions drop-down list.

Update Status	Updates the Application, Interview, Ranking, and/or Custom status of the selected applicant(s).
Update Attributes	Updates a specific attribute for the selected applicant(s) to a specific value.
Update Notes	Adds a note for the selected applicant(s).
Bulk Messages	Sends a message to the selected applicant(s).

View/Print Reports	<p>Views/prints one of the following reports for the selected applicant(s):</p> <ul style="list-style-type: none"> • Applicant Roster - displays the applicants and their most recent application status. • Applicants applying as a Couple - displays applicants who have indicated they want to match as a couple and to which specialties the partner is applying. • Missing Documents - displays applicants who are missing at least one standard ERAS document. • Withdrawn Applicants - displays applicants who have been withdrawn from the program or withdrawn by applicant. • Applicants Selected to Honor Societies - displays all applicants and indicates who was selected to an honor society.
View/Print Applications	Views/prints information for the selected applicant(s).
CSV Export	Exports a CSV file of selected applicants using an existing template.
Assign Applicants	Multiple applicants can be assigned to program users (e.g., Reviewers)

To Navigate through the List:

- Click the scroll bars and/or the navigation buttons.

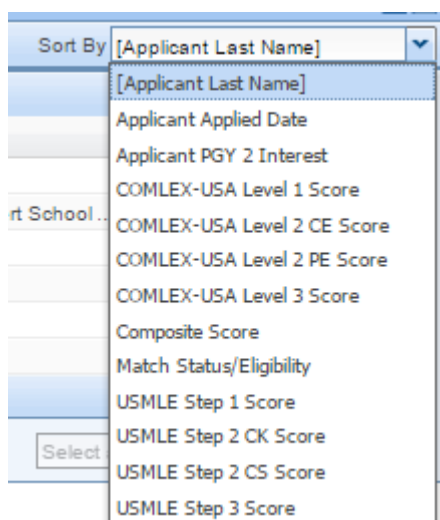


To Sort the List of Applicants:

- Click the column heading to sort.

Or

- Click the **Sort by** drop-down and choose the desired field.



Note: If a system-defined filter contains a predefined sort, the system will automatically update the fourth column in the Results grid with the sort field defined in the filter.

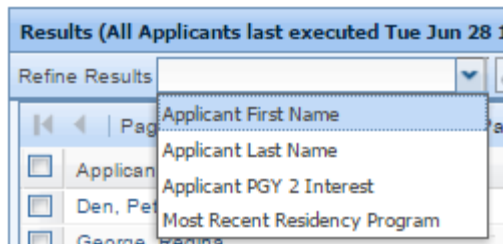
Sort by options are user-level preferences. If you apply a filter, choose a Sort by field, then log out, the system will display the same Sort column in the results grid when logged back in.

To View the Applications:

- Click the Applicant name; the application is displayed under the View Applications under the **Applications** tab.

To Refine the Results:

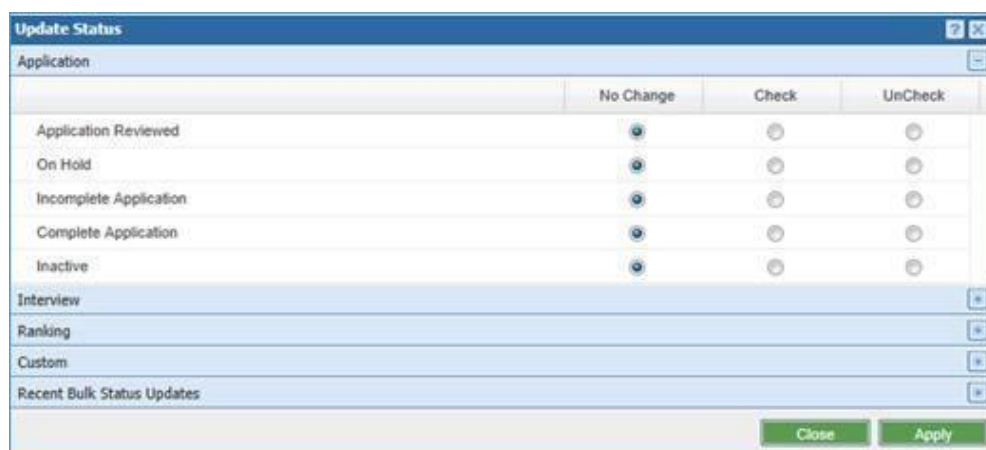
1. Select an option within the **Refine Results** box (Applicant Last Name, Applicant First Name, Applicant PGY 2 Interest or Most Recent Residency for Fellowship programs).



2. Type a specific value by which to search in the **enter value** box.
 - The less specific the search value entered, the more applicants returned.
 - Must enter in at least 3 characters.
3. Click the **Refine** button.
4. When prompted to refresh the filter, click the **Yes** button.

To Update Status:

1. Select the applicant(s).
2. Select **Update Status** from the drop-down list.
3. Click the **Go** button.



4. Select one of the following status options: Application, Interview, Ranking, or Custom.
5. Make the appropriate changes for the desired statuses.
 - The No Change option incurs no changes.
 - The Check option will check the box for the desired status.
 - The Uncheck option will uncheck the box for the desired status.
6. Click the **Apply** button.
 - Only one status can be updated at a time under each grouping.

To Update Attributes:

1. Select the applicant(s).
2. Select **Update Attributes** from the drop-down list.
3. Click the **Go** button.

	No Change	Check	UnCheck
Urban Experience	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Away Rotations	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Experience	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Textbox Attributes +

Date Attributes +

Dropdown Attributes +

Recent Bulk Attribute Updates +

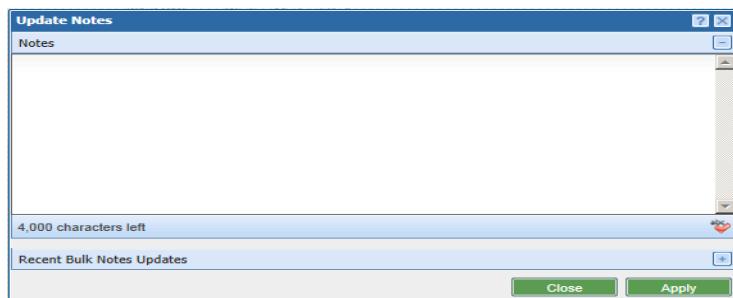
Close Apply

4. Choose the appropriate type of attribute (Checkbox, Textbox, Date, or Drop-down), and make the appropriate changes.
 - The No Change option incurs no changes.
 - The Check option will check the box for the desired status.
 - The Uncheck option will uncheck the box for the desired status. The Clear option will reset any entered attributes back to the default.
5. Click the **Apply** button.

6. Click the **Close** button to close the Update Attributes light box.

To Update Notes:

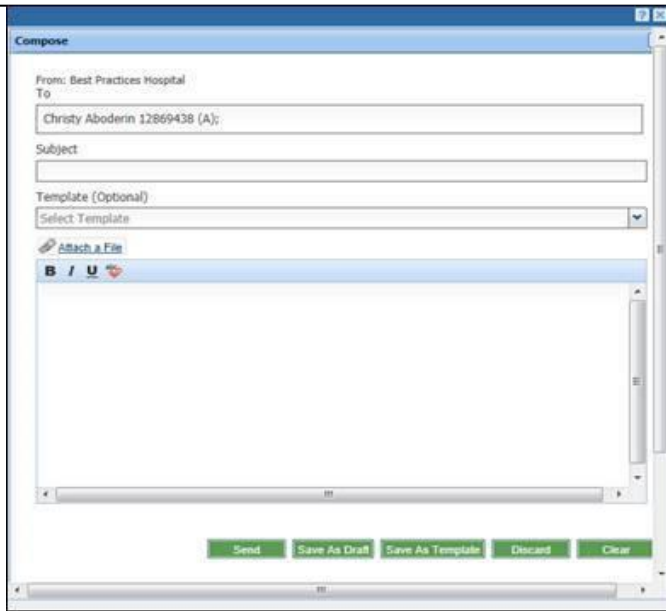
1. Select the applicant(s).
2. Select **Update Notes** from the drop-down list.
3. Click the **Go** button.



4. Type the note.
5. Click the **Apply** button.

To Send Bulk Messages:

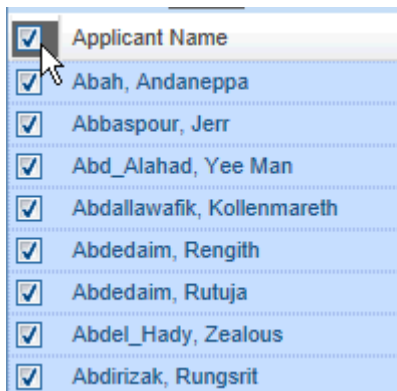
1. Select the applicant(s).
2. Select **Bulk Messages** from the drop-down list.
3. Click the **Go** button.



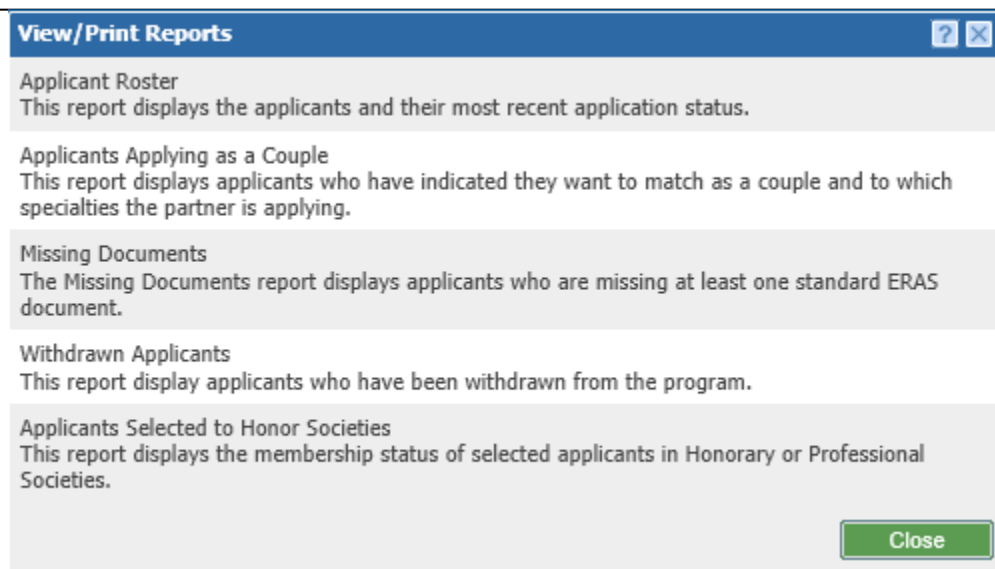
- The Compose message window appears. All applicants are blind carbon copied (Bcc'ed).

To View/Print Reports:


1. Select the applicant(s).
 - It may make sense to select all filtered applicants when generating the Applicants Applying as a Couple, Missing Documents, Withdrawn Applicants, or Applicants Selected to Honor Societies reports. Use the select all option to select all applicants on the filtered list.



2. Select **View/Print Reports** from the drop-down list.
3. Click the **Go** button.



4. Select a report.



ERAS **AAMC**

AAMC Osteo Test Program
Neurological Surgery
999072

Applicant Roster
Filter: 3 LoRs Received (28)

Tracks Available for this Program:
Osteopathic (Residency (Osteopathic))

Filter Type: System Defined
Filter Name: 3 LoRs Received
Filter Description: At least 3 LoRs received for active applicants

AAMC ID	Applicant Name	E-mail	Most Recent Medical Training Program	Most Recent Medical School	Most Recent Application Status	Most Recent Application Status Date	Tracks Considered by Program	Tracks Applied by Applicant
21028629	Andrews, Yvette EC VI	pdwsplit@aamc.org	Baystate Medical Center	New York College of Osteopathic Medicine of NY Institute of Technology	Applicant Applied	05/13/2014	Residency (Osteopathic)	Residency (Osteopathic)
21028631	Bacon, Kevin FC	pdwsplit@aamc.org	None	New York College of Osteopathic Medicine of NY Institute of Technology	Applicant Applied	05/13/2014	Residency (Osteopathic)	Residency (Osteopathic)
21028633	Beans, Tara GC	pdwsplit@aamc.org	None	New York College of Osteopathic Medicine of NY Institute of Technology	Applicant Applied	05/13/2014	Residency (Osteopathic)	Residency (Osteopathic)
21028779	Burner, Steve HC	pdwsplit@aamc.org	None	Chicago College of Osteopathic Medicine of Midwestern University	Applicant Applied	05/13/2014	Residency (Osteopathic)	Residency (Osteopathic)
21028782	Canes, Midew JC	pdwsplit@aamc.org	None		Applicant Applied	05/13/2014	Residency (Osteopathic)	Residency (Osteopathic)

*There may be more than one most recent application status due to bulk updates.

J. Nelson
Confidential - Do not disclose or distribute applicant information to persons outside the residency/fellowship application process.

1 of 5

03/15/2016 16:52:05 PM

- A PDF of the report appears in Adobe Reader. The Adobe Reader toolbar offers buttons for saving, printing, navigating, and zooming the PDF report.
- Visit <http://helpx.adobe.com/reader/using/save-view-search-pdfs.html> for help on how to use Adobe Reader.

To View/Print Application:

1. Select the applicant(s).
2. Select **View/Print Application** from the drop-down list.
3. Click the **Go** button.

View/Print Application

<input type="checkbox"/> Documents	<input type="checkbox"/> Other
<input checked="" type="checkbox"/> MyERAS Application	<input type="checkbox"/> Applicant Summary
<input type="checkbox"/> Curriculum Vitae	<input type="checkbox"/> Scores
<input checked="" type="checkbox"/> Medical School Transcript	<input type="checkbox"/> Attributes
<input checked="" type="checkbox"/> MSPE	<input checked="" type="checkbox"/> Interview Scores and Comments
<input type="checkbox"/> LoRs	<input checked="" type="checkbox"/> Reviewer Scores and Comments
<input type="checkbox"/> Personal Statement	<input type="checkbox"/> Communication
<input type="checkbox"/> Photograph	<input type="checkbox"/> Notes
<input type="checkbox"/> USMLE Transcript	
<input type="checkbox"/> COMLEX-USA Transcript	
<input type="checkbox"/> ECFMG Status Report	

Your Print Selection

Name
Interview Scores and Comments
Reviewer Scores and Comments
MyERAS Application
Medical School Transcript
MSPE

Only the documents available for the selected applicants will be printed

☒ Print each application to a separate PDF
☐ Print all applications to one PDF

Print Job name

Job ACD

4. Choose the information to view or print; at least one document type must be selected.
 - Choose any other additional information to view or print.
 - Select whether to print each application to its own separate PDF or print each application to one cumulative PDF.

Note: If you have selected more than 100 applicants, you will have to print all

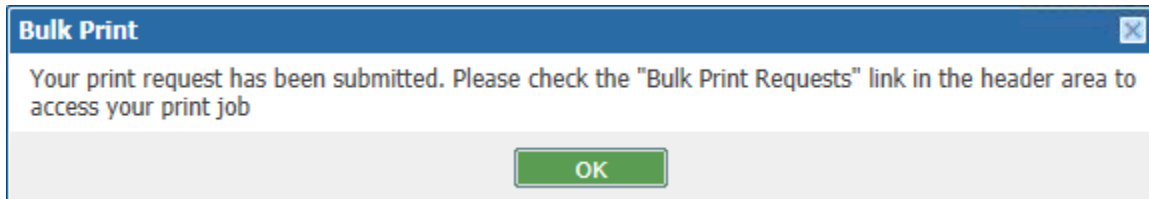
applications to one PDF

5. Enter a Print Job name.

- This name helps identify the print job in the Bulk Print Requests light box.

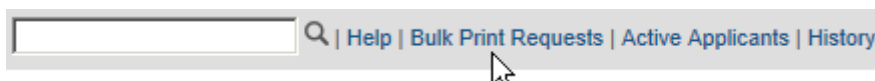
6. Click the **Request Print** button.

- The print request is sent and may be retrieved by clicking the Bulk Print Requests link in the header area.



7. Click the **OK** button.

8. Click the **Bulk Print Requests** link in the header area.

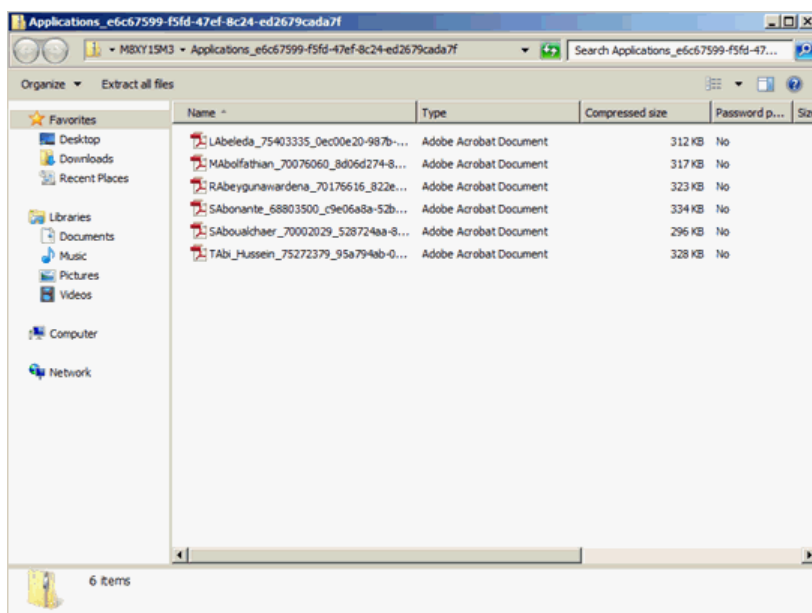


- The **Print Requests** light box lists print jobs requested and scheduled exports. If the status is complete, the resulting file can be opened or saved to a local or network drive.

Print Job Name	Files	User's Name	Requested Date	Status
Applications	Applications	x.zhang	10/22/2013 01:49 pm	COMPLETE
Newer1	Newer1	x.zhang	10/22/2013 10:58 am	COMPLETE
Newer	Newer	x.zhang	10/22/2013 10:53 am	COMPLETE
Jenna	Jenna	x.zhang	10/22/2013 09:55 am	COMPLETE
Jenna	Jenna	x.zhang	10/22/2013 09:55 am	COMPLETE
tEMP	tEMP	x.zhang	10/22/2013 09:54 am	COMPLETE
Applicants Sele...	Applicants Selected to Hono...	x.zhang	10/22/2013 09:49 am	COMPLETE
Jenna	Jenna	x.zhang	10/22/2013 09:30 am	COMPLETE
Jenna	Jenna	x.zhang	10/22/2013 09:29 am	COMPLETE

9. Click the report name link under the **Files** column to open or save the report.

- If the **Print each application to a separate PDF** box was checked, a .zip folder displays with each PDF report listed separately.



Alino_Guimalda, Ketankumar(67589335)

12/03/2015

MyERAS Application

General Information

Name: <i>Alino_Guimalda, Ketankumar</i>	Applicant ID: <i>2015018168</i>
Previous Last Name:	AAMC ID: <i>67589335</i>
Preferred Name:	
Most Recent Medical School: <i>Virginia Commonwealth University School of Medicine</i>	
	USMLE ID: <i>9-301-870-7</i>
	NBOME ID:
Email: <i>algaacnl@amask.org</i>	NRMP ID: <i>N0236850</i>
Gender: <i>Male</i>	Participating in the NRMP Match: <i>Yes</i>
Birth Date: <i>04/27/1978</i>	Participating as a Couple in NRMP: <i>No</i>
Birth Place: <i>Casper, WY</i>	
Citizenship: <i>U.S. Citizen</i>	
<u>Self Identification:</u>	
<i>White</i>	
<u>Present Mailing Address:</u>	<u>Permanent Mailing Address:</u>
<i>6651 N. Campbell Ave</i>	<i>127 Union St</i>
<i>Richmond, VA 23221</i>	<i>Richmond, VA 23221</i>
Preferred Phone #: <i>2028424584</i>	Phone: <i>2028624411</i>
Alternate Phone #:	
Mobile #:	
Pager #:	
Fax #:	

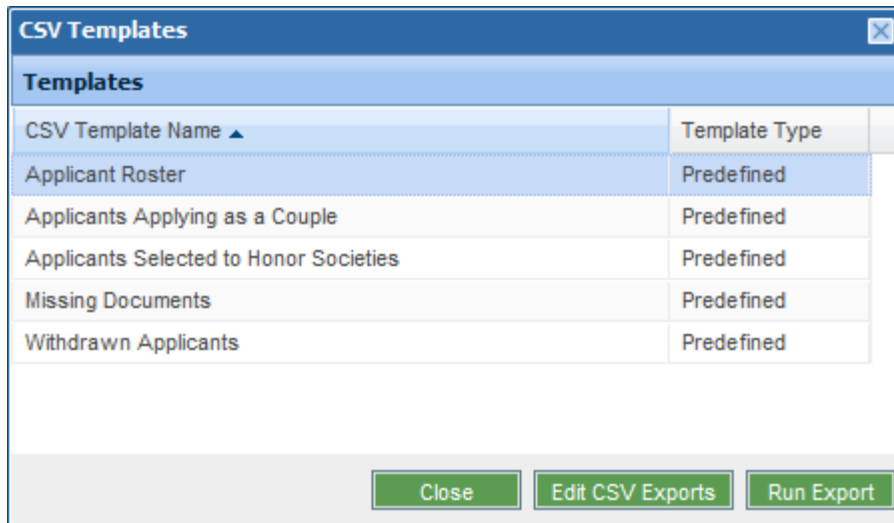
Military Service Obligation/Deferment? *No*Other Service Obligation? *No*Misdemeanor Conviction in the United States? *No*Felony Conviction in the United States? *No*

- A PDF of the report appears in Adobe Reader. The Adobe Reader toolbar offers buttons for saving, printing, navigating, and zooming the PDF report.
- Visit <http://helpx.adobe.com/reader/using/save-view-search-pdfs.html> for help on

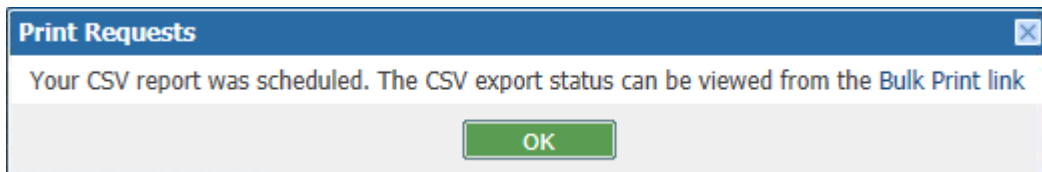
how to use Adobe Reader.

To Run an Export Report:

1. Select the applicant(s).
2. Select **CSV Export** from the menu.
3. Click the **Go** button.



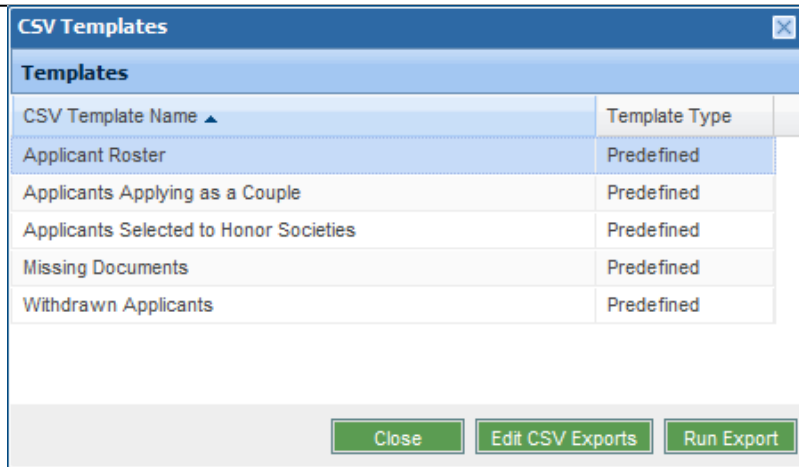
4. Select a CSV template to run.
5. Click the **Run Export** button.



6. Click the **OK** button.
7. Close the CSV Templates light box to return to the applicant list.
 - The CSV export is scheduled and is viewable from the **Exports** tab in the CSV Exports panel or from the Bulk Print Requests link in the header area.

To Modify an Export Report Template:

1. Select the applicant(s).
2. Select **CSV Export** from the drop-down list.
3. Click the **Go** button.



4. Select a CSV template to modify.
5. Click the **Edit CSV Exports** button.
 - This displays the Exports tab. The Templates panel lists saved templates. The CSV Exports panel lists the most recently run CSV exports. The "complete" status link allows the export file to be saved.



6. In order to edit or select which fields will be exported, click the Template name.
7. Edit the fields to export by clicking the field name(s) in the **Available Fields** box and using the arrow buttons to move and rearrange the desired field(s) in the **Fields to Export** box.

CSV Export Name

Type of data to export

Available Fields

- Alpha Omega Alpha
- Alpha Omega Alpha (Yes/No)
- Alternate Phone #
- Birth Place
- Cell Phone #
- Citizenship
- Contact Address 1
- Contact Address 2
- Contact City
- Contact Country

Fields to Export

- AAMC ID
- Applicant Name
- E-mail
- Most Recent Medical Training Program
- Medical School of Graduation
- Most Recent Application Status
- Most Recent Application Status Date
- Tracks Considered by Program
- Tracks Applied by Applicant

8. When finished, choose **Save as New & Run** to save the template for repeated use and run the export immediately; or, choose **Run** to run the export without saving the template.
 - If the template is a Custom Template, the **Save & Run** option will be available to save the existing template, as shown below.

CSV Export Name

Type of data to export

Available Fields

- AAMC ID
- AOA ID
- AOA Member Number
- AUA Number
- Alpha Omega Alpha
- Alpha Omega Alpha (Yes/No)
- Alternate Phone #
- Applicant Name
- Birth Place

Fields to Export

Templates

CSV Template Name	Template Type
Applicants Selected to Honor...	Predefined
Applicant Roster	Predefined
Withdrawn Applicants	Predefined
Missing Documents	Predefined
Applicants Applying as a Couple	Predefined
Jenna	Custom Template
New Status Export	Custom Template

CSV Exports

CSV Export Name	Status
Jenna	complete
Jenna	complete
TEMP	complete
Applicants Selected to Honor Soci...	complete
Newer Status Export	complete

9. In the **CSV Exports** panel, click the **complete** status link on the line next to the name of the CSV export.

Templates

CSV Template Name	Template Type
Applicant Roster	Predefined
Applicants Applying as a Couple	Predefined
Applicants Selected to Honor Societies	Predefined
Missing Documents	Predefined
Withdrawn Applicants	Predefined

CSV Exports

CSV Export Name	Status
Applicants Applying as a Couple	complete

10. When prompted, download the CSV file.

Export Data


ERAS data is categorized by information type and can be exported either by type or all together. This includes over 200 data items relating to the data the applicant sent (such as name, contact information, AOA status, gender), the data the examining boards sent (such as COMLEX-USA and USMLE scores), and the data recorded about the applicant (such as interview date, status, scores).



Information from other fields may be exported, such as:

- Education Information
- Interview Information
- License Information
- Medical Education Information
- Publication Information
- Research Information
- Qualifying Residency/Fellowship Information
- Ranking/Track Information
- Work Experience Information
- Race/Ethnicity Information
- Volunteer Experience Information
- Residency/Fellowship Information
- Research Experience Information
- Interview Schedule Information
- SOAP Applicant Information (Allopathic Residency Programs only)

To export data, a template must be created. This involves selecting the fields to include in the export and providing a name for the template. Once the template is saved, it can be used repeatedly to export the same set of data or modified when the need arises. When exporting data, a copy of the data is exported. The original data is not affected.

Note: ERAS cannot support software outside of the PDWS. Refer to the documentation for that software to successfully transfer information or utilize exported data.

 Add a new export template

Templates		
CSV Template Name	Template Type	
Applicants Selected to Honor Societies	Predefined	
Applicant Roster	Predefined	
Withdrawn Applicants	Predefined	
Missing Documents	Predefined	
Applicants Applying as a Couple	Predefined	
Newer1	Custom Template	
Newer	Custom Template	

CSV Exports		
CSV Export Name	Status	
Newer1	complete	
Newer	complete	
Jenna	complete	
Jenna	complete	
tEMP	complete	

To Create a New Export Template

1. On the Exports tab, click the **Add a new export template** link.

CSV Export Name

Type of data to export

Personal

Available Fields

AAMC ID
AOA ID
AOA Member Number
AUA Number
Alpha Omega Alpha
Alpha Omega Alpha (Yes/No)
Alternate Phone #
Applicant Name
Birth Place

Fields to Export



Save as New & Run

Save & Run

Run

Clear

Templates

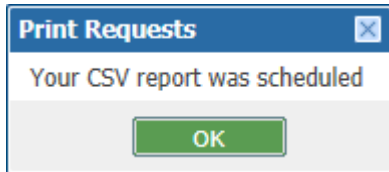
CSV Template Name	Template Type	
Applicants Selected to Honor...	Predefined	
Applicant Roster	Predefined	
Withdrawn Applicants	Predefined	
Missing Documents	Predefined	
Applicants Applying as a Couple	Predefined	
Jenna	Custom Template	
New Status Export	Custom Template	

CSV Exports

CSV Export Name	Status	
Jenna	complete	
Jenna	complete	
tEMP	complete	
Applicants Selected to Honor Soci...	complete	
Newer Status Export	complete	

2. Type a name for the template in the **CSV Export Name** box.
3. Select **Type of data to export** from the drop-down.
 - The type of data selected controls the fields listed in the Available Fields box.
4. Select the fields to export by clicking the field name(s) in the **Available Fields** box and using the arrow buttons to move and rearrange the desired field(s) in the **Fields to Export** box.

5. When finished, choose **Save as New & Run** to save the template for repeated use and run the export immediately. Choose **Run** to run the export without saving the template.
6. Click the **OK** button.



- The export is scheduled and the status appears in the CSV Exports panel on the lower-right area of the screen.

CSV Exports	
CSV Export Name	Status
Applicant Roster	complete
Applicant Roster	complete
Newer1	complete
Newer	complete
Jenna	complete

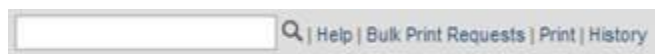
7. Click the **complete** status link next to the CSV export name to open or save the export.
 - CSV exports are also viewable from the **Exports** tab or from the Bulk Print Requests link in the header area.

Applicant History Log

The History link tracks the following:

- Changes to statuses and scores, including interview scores
- Changes to the list of attributes
- List of documents added or deleted
- Tracks added by program
- Reviewer assignments added by program

Note: The log is only accessible to users who have permissions to perform these tasks.



Applicant History - AccntTester2, Monique I2FC						
Status	Scores	Interview	Reviewers	Attributes	Documents	Tracks
Assignments						
User's Name	Category	Field Name	Old Val...	New Value	Date	
z.xu	Interview Status	Selected to Interview	No	Yes	09/04/2015 09:50 am	
D.Fowlkes	Custom	Honors in Surgery	No	Yes	08/21/2015 11:39 am	
D.Fowlkes	Application Status	On Hold	No	Yes	08/21/2015 09:39 am	

Scheduler

The **Scheduler** is designed to make scheduling applicants through the PDWS flexible. There is an option for privately scheduling applicants, and an option to send interview date(s) to applicant(s) and allow them to self- schedule.

Calendar

The **Calendar view** provides a visual of the schedule for easy reference and confirmation. Details include both Private and RSVP events that have been created, as well as the number of scheduled slots and number of applicants paired with an interviewer.

- Private events are in purple and cannot be seen by the applicant.
- RSVP events are in green and can be included in Invitations to send out to applicant(s) so they can self-schedule for an interview.

The screenshot displays the AAMC Scheduler interface. At the top, the navigation bar includes links for Dashboard, Applications, Scheduler, Rankings, Reports, Archives, Setup, and Program Messages. The user is logged in as Stacey Winningham. Below the navigation bar, the breadcrumb trail shows the current path: Scheduler / ERAS TEST SPONSOR MD 1 / AAMC Program 8 Family Med (for testing only) / Family Medicine. A 'New Event' button is located on the left. A summary bar provides counts for various event statuses: 0 Selected, 18 Invited, 14 Invited Privately, 11 Waitlisted, 15 Scheduled, 12 Interviewed, and 0 Declined. The main calendar view shows June 2017. A green box on June 5th indicates an 'RSVP Event Scheduled' with 0/5 slots. A purple box on June 14th indicates a 'Private Event Scheduled' with 0/5 slots. On the left, there's a sidebar with a calendar for April 2017 and a list of filterable events: Private Event, RSVP Event, Open Schedule Slots, and Open Waitlist Slots.

By default, all events show on the calendar; check one or more type of event to only show those events on the calendar. Filter on Private events, RSVP events, events with open schedule slots, events with open waitlist slots, events that do not have applicants paired with interviewers or RSVP events without invited applicants.

Click on an event to view more details such as applicants that have been scheduled or paired

with an interviewer(s) or to edit the event.

Note: Program Super Users, Alternative Program Super Users, and Program Coordinators can see the calendar schedules for all applicants and all interviews. Interviewers have the ability to view their own personal calendar, which will contain only the applicants scheduled with them; however, they will not be able to see other interviewers’ calendars.

Applicants

The **Applicants view** displays all applicants who have at least been selected to interview. On the left side, filter by applicants based on their interview status. Within the applicant section, view the applicant’s name, most recent medical school (for residency applicants) or most recent residency (for fellowship applicants), along with their interview status.

The screenshot shows the 'Applicants' view in the ERAS Scheduler. The top navigation bar includes 'Scheduler', 'ERAS TEST SPONSOR MD 2', 'AAMC Program4 Dermatology (for testing only)', 'Dermatology', and 'PGY 1-5 (Categorical)'. A left sidebar contains filters for 'Tracks' (PGY 1-5) and 'Applicants' (Selected, Invited, Waitlisted, Scheduled, Interviewed, Declined). The main area features a search bar and a table of applicants. The table has columns for 'Name', 'Most Recent Medical School', 'Status', and 'Action'. The table lists 8 applicants with their names, medical schools, and a 'Details' link in the Action column.

Name	Most Recent Medical School	Status	Action
Arbuz, Donkor, Raghuram	ZZZ AAMC Dean's Office - Test Site 1		Details
Bacon, Kevin FC	New York College of Osteopathic Medicine of NY Institute of Technology		Details
Beams, Tara GC	New York College of Osteopathic Medicine of NY Institute of Technology		Details
Courtney, Indigo K	Indiana University School of Medicine		Details
Dustin, Duane G	Wayne State University School of Medicine		Details
Fisher, Melody DC	New York College of Osteopathic Medicine of NY Institute of Technology		Details
Jolepalem, Tuangsil, I	ZZZ AAMC Dean's Office - Test Site 1		Details
Lakes, Tina H	Indiana University School of Medicine		Details

Click on the **applicant’s name** to view interview details about the applicant.

Scheduler ERAS TEST SPONSOR MD 2 / AAMC Program4 Dermatology (for testing only) / Dermatology / PGY 1-5 (Categorical) Help

Payne, Marcos CC (21028624) Invited Scheduled Go Back Send Invitation

First Name: Marcos
Middle Name: CC
Last Name: Payne
Email Address: pdwspilot@aamc.org
AAMC Id: 21028624
Most Recent Medical School: New York College of Osteopathic Medicine of NY Institute of Technology

Track	Applicant Selected	Program Selected
PGY 1-5 (Categorical)	✓	✓

Interviews	Event	Interviewers	Location	No Show
Sep 8, 2016 8:00 AM to 8:10 AM	RSVP Self-Schedule 1	Huq, Tanveer ; Pred, Stephen	AAMC Building	No Mark as No Show

Search: Event Name... Event Status... Rows per Page: 20

Remove Event

Applicant Status	Type	Name	Date	Time	Freeze Date	Action
Invited	RSVP	RSVP Self-Schedule 1	7/28/16	AM	7/18/16	View
Removed	RSVP	RSVP Self-Schedule 1	7/27/16	PM	7/17/16	
Scheduled	RSVP	RSVP Self-Schedule 1	9/8/16	AM	8/29/16	View

Back in the **Applicants view**, the **Action column** offers several options.

- Click on the drop-down arrow to view the following list of options:

Calendar Applicants Events Invitations Interviewers Responses

Rows per Page: 20 of 32 / 15 MB

Status	Invited	Scheduled	Waitlisted	Action
Invited				View Application Details Send Message Invite Select for Ranking Mark as Interviewed Mark as Declined
Invited				Details

View Application	A new tab opens with the applicant’s application.
Details	Displays interview details about the applicant, such as the dates the applicant was invited and/or scheduled and whether the applicant has been paired with any interviewers.

Send Message	A New Message pop up appears in order to send a message to an applicant. This does not change their interview status or invite them to self-schedule for any dates.
Invite	Send a list of created RSVP events to the applicant that allows them to self-schedule for an interview date.
Select for Ranking	Changes the applicant’s ranking status so they are ready to be ranked.
Mark as Interviewed	Changes the applicant’s interview status to Interviewed .
Mark as Declined	Changes the applicant’s interview status to Declined .

Note: Hover over the applicant’s indicator status (i.e., Invited, Scheduled or Waitlisted) to view the corresponding date for that status.

Events

The **Events view** lists all Private and RSVP events that have been created. Next to each event, the following details are listed: name, date, time, the freeze date (only for RSVP events), the number of invited applicants, number of waitlisted applicants, number of scheduled applicants, number of scheduled applicants paired with an interviewer, and the number of applicants marked as a no show.

Type	Name	Date	Time	Freeze Date	Invited	Waitlisted	Scheduled	Paired	No Show
Private	Afternoon	Sep 21, 2016	PM	N/A	N/A	0/5	0/5	N/A	N/A
Private	Full Day Events	Sep 5, 2016	ALL DAY	N/A	N/A	0/5	0/5	N/A	N/A
Private	Full Day Events	Sep 6, 2016	ALL DAY	N/A	N/A	0/5	0/5	N/A	N/A
Private	Full Day Events	Sep 7, 2016	ALL DAY	N/A	N/A	0/5	0/5	N/A	N/A
Private	Full Day Events	Sep 8, 2016	ALL DAY	N/A	N/A	0/5	0/5	N/A	N/A
Private	Full Day Events	Sep 9, 2016	ALL DAY	N/A	N/A	0/5	0/5	N/A	N/A
Private	Event for PGY 1 Applicants	Aug 10, 2016	ALL DAY	N/A	N/A	0/5	1/5	1/1	0/1
Private	Event that is Private	Jul 27, 2016	AM	N/A	N/A	1/5	2/5	2/2	0/2
Private	Event 3	Jul 14, 2016	ALL DAY	N/A	N/A	3/3	6/6	6/6	0/6
Private	Test Event 4	Jul 13, 2016	ALL DAY	N/A	N/A	0/0	0/5	N/A	N/A
RSVP	RSVP	Aug 29, 2016 - Sep 1, 2016	ALL DAY	Aug 29, 2016	1	0/0	0/5	N/A	N/A

Invitations

The **Invitations view** tracks all invitations that have been sent to applicant(s). Each invitation shows the date the invitation was sent, to which applicant(s) it was sent, and the

event that was sent in the application. **Note:** Only RSVP Events can be sent through Invitations.

To Sort the Columns:

1. Click on the header names to sort the columns.

New Event ▾

0 Selected 18 Invited 14 Invited Privately 11 Waitlisted 15 Scheduled 12 Interviewed 0 Declined

Calendar Applicants **Events** Invitations Interviewers Responses

Search: Event Name...

New Invitation ▾

Rows per Page: 20 ▾ of 129 / 129

<input type="checkbox"/>	Type	Name	Date	Time	Freeze Date	Invited	Waitlisted	Scheduled	Paired	No Show
<input type="checkbox"/>	RSVP	freeze date 2	Jun 16, 2016	ALL DAY	Jun 14, 2016	5	0/0	0/5	N/A	N/A
<input type="checkbox"/>	RSVP	freeze date	Jun 17, 2016	ALL DAY	Jun 16, 2016	6	0/4	0/1	N/A	N/A
<input type="checkbox"/>	RSVP	6/15 round 1 invites	Jun 20, 2016	ALL DAY	Jun 19, 2016	7	0/1	0/2	N/A	N/A
<input type="checkbox"/>	RSVP	6/15 round 1 invites	Jun 21, 2016	ALL DAY	Jun 20, 2016	6	0/1	0/1	N/A	N/A

Interviewers

The **Interviewers view** lists all interviewers who have access to the PDWS as well as user defined interviewers created in the Interviewer Tool in Setup. On the left, select interviewers to view in the list. **Note:** the Interviewers view works best in the Day view to see which interviewers are available; however, there are also Week and Month views.

Calendar Applicants Events **Interviewers** Responses

Today August 2, 2016 Day Week Month

Interviewers	6am	7am	8am	9am	10am	11am
Huq, Tanveer			(AAMC Building) Salinas, Andy M			
Fred, Stephen						
Williams, Chris						
Peng, Richard						
O'Neil, Alexander						
Kazmi, Salman						

Search: Interviewer Name...

☒ Huq, Tanveer
☒ Fred, Stephen
☒ Williams, Chris
☐ Nelson, Jennifer
☐ Sujana, Dukhharjan
☒ Peng, Richard
☐ Alexander, Myrin

Responses

The **Responses view** tracks all applicant responses. This view displays the applicant, their applicant status and the date and time they self-scheduled. On the left, filter by the interview status such as Scheduled, Waitlisted, Cancelled or Declined. Click on the header names to sort the columns. Click on the applicant name to go to the applicant details section.

Create a Private Event

Private Event(s) appear on the calendar in purple, and are used to schedule applicants to interviews that should only be displayed in the PDWS. These events cannot be included in a Scheduler Invitation and sent to applicants.

Therefore, applicants will not be able to self-schedule for interviews. Use Program Messages to send the details of the Private Event information to the applicant(s).

To Create a Private Event:

1. Sign into the PDWS and click on the **Scheduler** tab.
2. Click the purple drop-down arrow next to **New Event**.
3. Click on **New Event**.

The screenshot displays the AAMC PDWS Scheduler interface. At the top, the navigation bar includes links for Dashboard, Applications, Scheduler, Rankings, Reports, Archives, Setup, and Program Messages. The user is logged in as Stacey Winningham. The main header shows the current view: Scheduler / ERAS TEST SPONSOR MD 1 / AAMC Program 8 Family Med (for testing only) / Family Medicine. A 'New Event' dropdown menu is open, showing options for Selected (0), Invited (18), Invited Privately (14), Waitlisted (11), Scheduled (15), Interviewed (12), and Declined (0). Below this, a calendar for June 2017 is shown. The calendar has tabs for Calendar, Applicants, Events, Invitations, Interviewers, and Responses. The 'Calendar' tab is active. The calendar shows a grid of dates from Sunday to Saturday. A green event labeled 'RSVP Event Scheduled 0/5' is shown on Monday, June 5th. A purple event labeled 'Private Event Scheduled 0/5' is shown on Wednesday, June 14th. The left sidebar shows a list of events with checkboxes for Private Event, RSVP Event, Open Schedule Slots, and Open Waitlist Slots.

4. Select the interview **date** and **event duration** (all day event, AM or PM).
5. To add more dates to the event, click on **Add Date**.
6. Enter in a **Name** (required) and **Details** (not required).
7. Enter the number of **Schedule Slots** (required) and **Waitlist Slots** (required).
8. At the top right, click **Save**. The event is created and you will be returned to the Calendar.

Add Applicants to a Private Event

To Add Applicants to a Private Event:

1. Click on an existing Private Event to add Applicants.
2. From the Applicants column, select applicant(s) by checking the box next to their name.
3. Within the Applicants column, click on the purple drop-down arrow. Click on **Move to Scheduled** or **Move to Waitlisted**. Applicants now appear in the Scheduled or Waitlist columns, shaded in light blue.
4. Click **Save** on the top right. You will be returned to the Calendar view.

The screenshot shows the AAMC Scheduler interface for a Private Event on Jun 6, 2016 (AM). The interface is divided into three main sections: Applicants, Scheduled, and Waitlisted. The Applicants section has a search bar, filters, and a list of applicants with checkboxes and a dropdown menu. The Scheduled and Waitlisted sections also have search bars and lists of applicants. The Applicants section has a purple dropdown menu with options 'Move to Scheduled (1)' and 'Move to Waitlisted (1)'. The Scheduled section has a purple dropdown menu with options 'Add Interview (0)' and 'Add Interview (1)'. The Waitlisted section has a message 'No applicants have been waitlisted.'

Pair Applicants with Interviewers

Pairing applicant(s) with interviewers will allow users with the interviewer roles to view the applicant’s application(s) and scheduler information. However, interview pairing information such as time, location, and interviewers are not shared with applicants.

To Pair Applicants with Interviewers:

1. Click on an existing Private Event to pair applicants with Interviewers.
2. Applicant(s) must be scheduled in order to pair them with an Interviewer. From the Scheduled column, **select applicants** by checking on the box next to their name.

3. Within the Scheduled Column, click on the purple drop-down arrow. Click on **Add to Interview**.
4. A pop up screen appears. At the top, select a specific **time frame** and **location**. To set the time, click outside of the box.

5. **Select interviewer(s)** by checking the box next to their name. **Note:** By default it shows you only the active and available interviewers that were indicated in Setup.
6. Click **Save**.
7. After the pop-up module closes, **click Save**, again, in the top right corner.

Delete a Private Event

To Delete a Private Event:

1. Sign into the PDWS and click on the **Scheduler** tab.
2. Click on a Private event.
3. Click on the **delete** button.

Create an RSVP Event

RSVP Event(s) appear on the calendar in green, and are Interview Events that can be included in Scheduler Invitations. A Scheduler Invitation can include multiple applicants and RSVP dates. Applicants can schedule themselves for one of the available dates **or** waitlist themselves for multiple dates. RSVP Invitations should help eliminate some of the back and forth needed for scheduling. Additional details should be provided in the invitation message such as location, start and end times.

To Create an RSVP Event:

1. Sign into the PDWS and click on the **Scheduler** tab.
2. Click on **New Event** from the top left drop-down.
3. Under the heading **New RSVP Event**, check the **RSVP Event** box.

The screenshot shows the AAMC Scheduler interface. The top navigation bar includes the AAMC logo and links to Dashboard, Applications, Scheduler, Rankings, Reports, Archives, and Setup. The breadcrumb trail reads: Scheduler / ERAS TEST SPONSOR MD 2 / AAMC Program 4 Family Med (for testing only) / Family Medicine. The main heading is 'New RSVP Event'. Below this, there is a checkbox labeled 'RSVP Event' which is checked. A note states: 'Information below will be shared with the applicants you invite.' The form contains three input fields: 'Start Date' with the value '6/1/17', 'End Date' with the value '6/1/17', and 'Event Duration' with a dropdown menu set to 'All-Day'. There is an 'Add Date' button below the date fields. At the bottom, there is a 'Freeze Day' input field with the value '0'. A note at the very bottom reads: 'Note: Set the number of days prior to an interview date an applicant must schedule/waitlist themselves by. Once a freeze day is selected, it cannot be changed. (Freeze day of 0 will allow the applicant to schedule themselves up to 11:59 PM ET the day before the interview date).'

4. On the left side, select your interview **date** and **event duration** (all day event, AM or PM). **Note:** Applicants will be able to see this duration but additional information with regards to specific times should be provided by your program in the invitation message.
5. To add more dates to the event, click on **Add Date**.
6. Set a **Freeze Day**. The Freeze Day will apply to all of the dates. **Note:** The Freeze Day sets the numbers of days prior to an interview day that an applicant must

schedule/waitlist themselves by. Once a freeze day is selected, it cannot be changed.

7. Enter in a **Name** (required) and **Details** (not required).
8. Enter the number of **Schedule Slots** (required) and **Waitlist Slots** (required).
9. At the top right, click **Save**. The event is created and the next screen will be the Calendar. **Note:** Clicking on 'Save and Invite Applicants' offers the option of immediately inviting applicants to the event(s).

Invite Applicants to an RSVP Event

Scheduler Invitations are used to send out one or multiple RSVP event dates to applicant(s) so they can self-schedule for an interview date **or** waitlist for multiple. Only RSVP Events can be included in these invitations. These dates appear on the calendar in green.

To Invite Applicants to an RSVP Event:

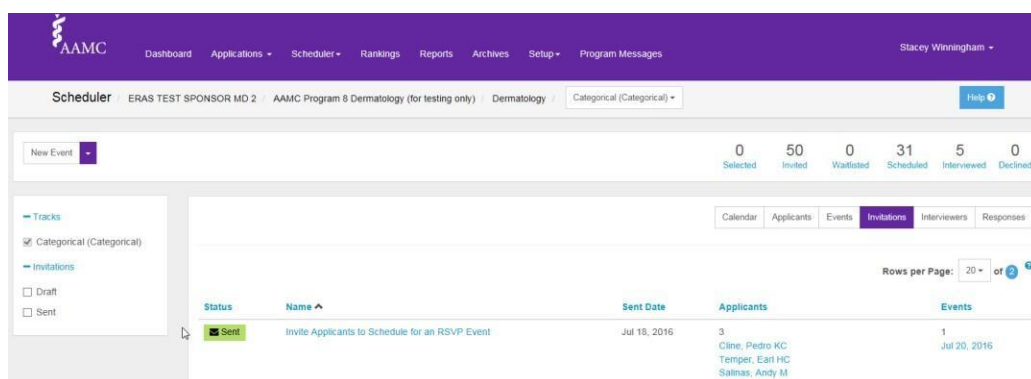
1. Sign into the PDWS and click on the **Scheduler** tab.
2. Select **New Invitation** from the drop-down next to New Event.

The screenshot displays the AAMC Scheduler web application. The top navigation bar includes links for Dashboard, Applications, Scheduler, Rankings, Reports, Archives, Setup, and Program Messages. The user is logged in as Gary Lee. The main header shows the current path: Scheduler / ERAS TEST SPONSOR MD 2 / AAMC Program 4 Family Med (for testing only) / Family Medicine. A 'New Event' dropdown menu is visible, with a summary of event statistics: 26 Selected, 18 Invited, 2 Waitlisted, 21 Scheduled, 13 Interviewed, and 0 Declined. The main content area features a calendar for June 2017. A green event slot is highlighted on Thursday, June 1st. The calendar view is set to 'Month' and 'Day' view. A sidebar on the left lists event types: Private Event, RSVP Event, Open Schedule Slots, Open Waitlist Slots, Missing Pairings, and No Invited Applicants. At the bottom of the calendar, there are buttons for 'Clear Selected' and 'New Event'.

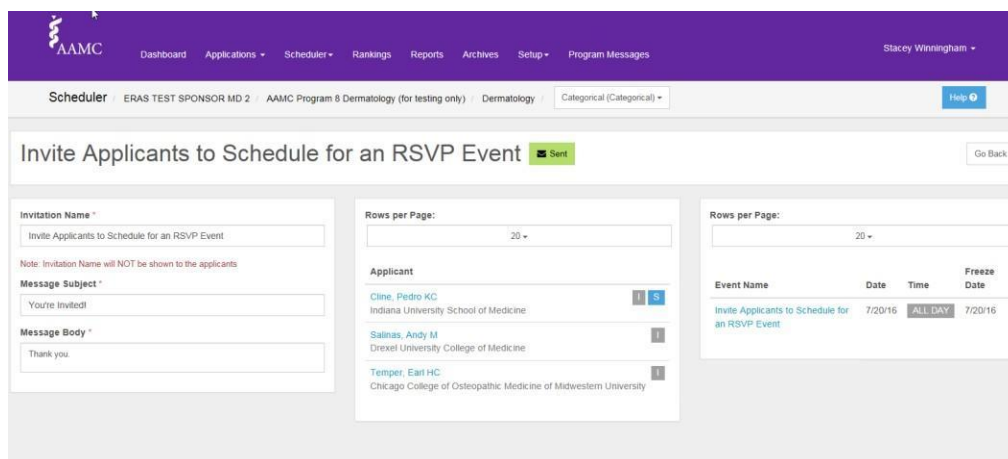
3. Enter an **Invitation Name**. (This field is not shared with applicants).
4. Input a Message Subject and Body. Interview information details should be provided in the message. The details should include start time, end time, and interview location.
5. Search for applicants either by their name or filter them by their **Application Status**.
Select applicant(s) to invite by clicking the box to the left of the applicant’s name. (All applicants are bcc’d and will not see other applicants who have been invited.)
6. First, check the box next to all the event(s) the selected applicants should choose from.
The invited applicants will only be able to Schedule themselves for one RSVP event or

Waitlist themselves for multiple events. Lastly, click **Send Invitation**. **Note:** More than one (1) Event may be selected.

- Once the invitation has been sent, you will be directed back to the Scheduler home page. To confirm and view invitations sent to applicants, click on the **Invitations** button. **Note:** By default, invitations sent will automatically appear in alphabetical order by the Invitation Name.



- To view the invitation details, click on the name of the event. **Note:** Event details will appear as the following:



Pair Applicants with Interviewers

Pairing applicant(s) with interviewers will allow users with the interviewer roles to view the applicant’s application(s) and scheduler information. However, interview pairing information such as time, location, and interviewers are not shared with applicants.

To Pair Applicants with Interviewers:

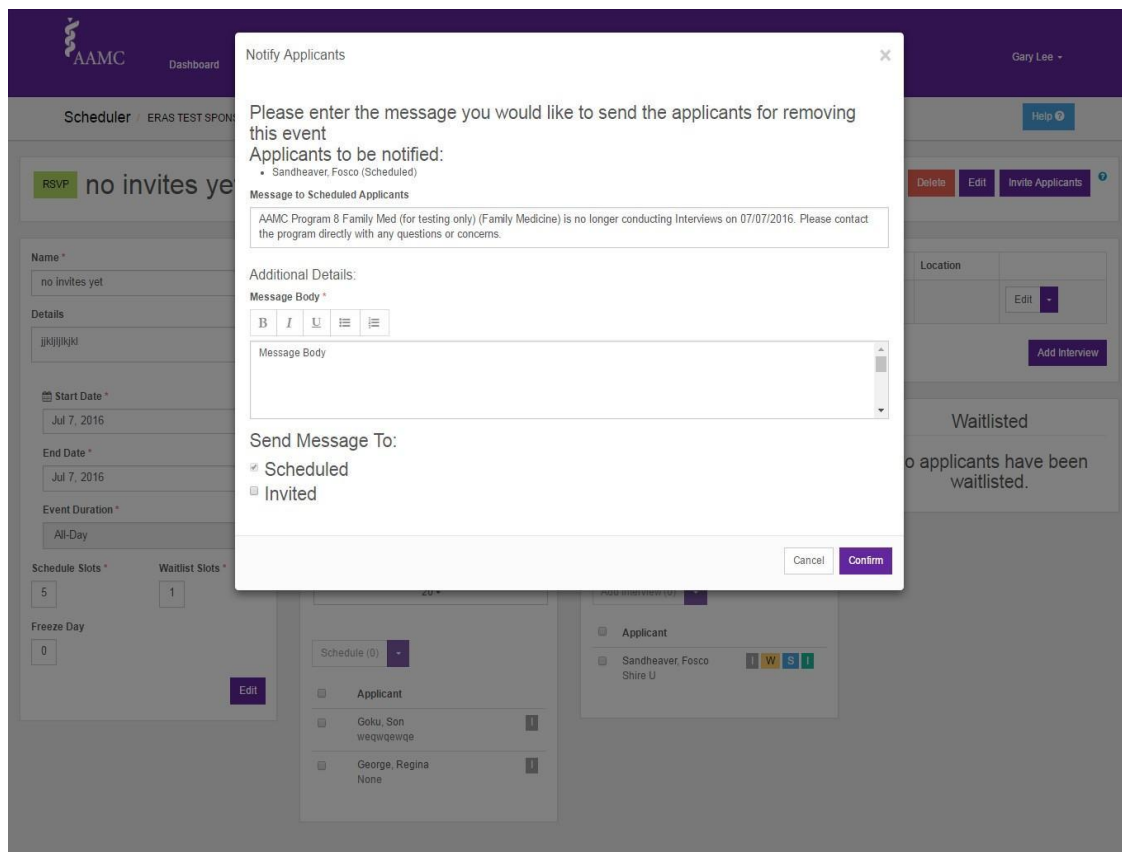
8. Click on an existing RSVP Event to pair applicants with Interviewers.
9. Applicant(s) must be scheduled in order to pair them with an Interviewer. From the Scheduled column, **select applicants** by checking on the box next to their name.
10. Within the Scheduled Column, click on the purple drop-down arrow. Click on **Add to Interview**.
11. A pop up screen appears. At the top, select a specific **time frame** and **location**. To set the time, click outside of the box.

12. **Select from the list of interviewers.** Check the box next to the interviewer to select them. **Note:** By default it shows you only the active and available interviewers that were indicated in Setup.
13. Click **Save**.
14. After the pop-up module closes, you will need to **click Save** again in the top right corner.

Delete an RSVP Event

To Delete an RSVP Event:

1. Sign into the PDWS and click on the **Scheduler** tab.
2. Click on an RSVP Event.
3. Click on the **delete** button.
4. Deleting events with Invited, Scheduled, or Waitlisted applicants will require you to send a response to the applicant(s). Default text for the program is automatically included in addition to the option to enter additional details. All applicant notifications will be bcc'd and sent to the applicant's MyERAS Message Center.



Rank

The **Rankings** tab of PDWS is used to review, compare, and rank applicants. The Rank tab displays a list of applicants selected for ranking with rank value as N/A and ranked applicants with rank value. The ranked applicants can only be accessed by the Program Super User, Alternate Program Super User, or Program Coordinator 1 roles. After the list has been finalized in the PDWS, a Rank Order List (ROL) file can be generated and can be uploaded into matching agencies (NRMP and NMS).

Allopathic Residency programs participating in SOAP will see a SOAP light bulb indicator next to applicants who applied to the program during SOAP.

Applicants you selected for ranking will appear below. To rank an applicant, enter a rank number or use rank by composite score

Select Track: Pediatrics/Research Trk|1820320C1 (Categorical) ▼

Rank (6)

Sort on these fields: Rank ▼ Composite Score ▲ Applicant Name ▲ AAMC ID ▲ Page 1 of 1 Displaying applicants 1 - 7 of 7

	Rank	Applicant	AAMC ID	NRMP ID	Composite...	Tracks	Most Recent Medical School
	1	Fifteen, Rober...	20020592	N7777777	1806.9004	Pediatrics/Research Trk 182...	Des Moines University College of Osteopathic Medi...
	2	document date...	20019828		0	Pediatrics/Research Trk 182...	Holy Family Red Crescent Medical College
	3	Dobrikovs, Galina	20017944	N7777777	601.0452	Pediatrics/Research Trk 182...	State University of New York Upstate Medical Unive...
	N/A	Kumar, Gaurav ...	20018798	N7896542	948.94	Pediatrics/Research Trk 182...	Flinders University of South Australia School of Med...
	N/A	seventeen, Ronald	20020969		2460	Pediatrics/Research Trk 182...	Des Moines University College of Osteopathic Medi...
	N/A	twelve, John mid	20019072	N7777777	0	Pediatrics/Research Trk 182...	Michigan State University College of Osteopathic M...
	N/A	Nathan, Thenna...	20019602	N1245698	0	Pediatrics/Research Trk 182...	Albert Einstein College of Medicine of Yeshiva Univ...

View Reports Rank by Composite Score Descending Rank by Composite Score Ascending Select an Action ▼

An applicant’s ranking status can be changed to Selected for Ranking by going to:

- The **Status** tab under the Applications tab (for a single applicant).
- The **Update Status** bulk action located from View Current Results (for multiple applicants).

-
- The **Applicants** section under the Scheduler tab.

Different rankings of selected applicants can be seen by selecting the appropriate Track to Rank (e.g., **Categorical** or **Preliminary** or **Fellowship**).

Depending on your role, some or all of the following bulk actions are available in the Rank tab:

Compare	Used to compare applicants and view the applicant comparison items side-by-side. The Comparison list is defined in the Setup tab and can include up to seven items.
Clear Rank Numbers	Used to clear the rank numbers for all the selected ranked applicants.
View/Print Applicant Summary	Used to view/print the Applicant Summary of all selected applicants in the Rank tab.
Bulk Messages	Used to send a message to selected applicants.

Note: To review an individual applicant, click the Applicant name to open up the applicant’s application in another window.

Sort Applicants

By default, the list of applicants selected for ranking is sorted by Rank (descending order), Composite Score (descending order), then by Applicant Name (ascending order), and then by AAMC ID (ascending order for allopathic programs) or AOA Match Code (ascending order for Osteopathic programs). These sorting options can be modified but the “Withdrawn by Applicant” and “Withdrawn by Program” applicants will always be sorted last.

To Sort Applicants:

1. To change the sort order from ascending or descending order, click the directional arrow of the sort field (i.e., Rank, Applicant Name, Composite Score, or AAMC ID).
2. To change sorting priority, click and drag one of the sort fields to the left or right. The leftmost position is the primary sort field.

Rank (27)

Sort on these fields: Rank Composite Score Applicant Name AAMC ID

Applicants you selected for ranking will appear below. To rank an applicant, enter a rank number or use rank by composite score

Select Track: Medicine-Preliminary|1820140P0 (Preliminary)

Rank (27)

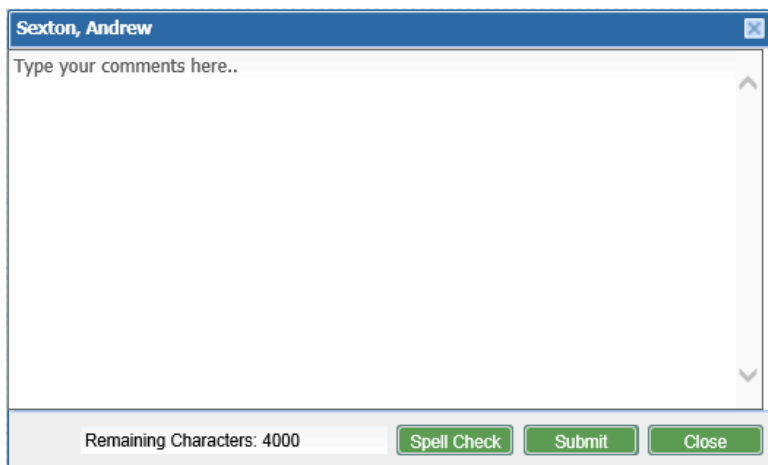
Sort on these fields: Rank Composite Score Applicant Name AAMC ID | Page 1 of 2 | Displaying applicants 1 - 25 of 33

	Rank	Applicant	AAMC ID	NRMP ID	Composite Score	Tracks	Most Recent Me...
	1	scorejuly.com...	20019580	N1234455	258.75	Internal Med/Global Health 1...	University of Calif...
	2	johnstdstventy...	20019448		0	Internal Med/Global Health 1...	Aland Institution
	3	Cognizant_Tes...	20019967	N1111	0	Internal Med/Global Health 1...	Tamilarasi Institut...
	4	Additional, D...	20020515	N3311313	231.77	Internal Med/Global Health 1...	Albert Einstein C...
	N/A	Arumugam, Elan...	20020882		140	Internal Med/Global Health 1...	Des Moines Univ...
	N/A	DO_Integratio...	20018846	N1234567	0	Internal Med/Global Health 1...	Philadelphia Coll...
	N/A	FilterAppican...	20020962	N7777777	0	Internal Med/Global Health 1...	Assam Medical C...
	N/A	Heritage_Ohio	20014023		0	Internal Med/Global Health 1...	Ohio University H...
	N/A	ICDDOGold_ICD...	20020658		0	Internal Med/Global Health 1...	UniversitÄst Wien...
	N/A	Jira_Jira	20021136		0	Internal Med/Global Health 1...	Des Moines Univ...

Enter Comments

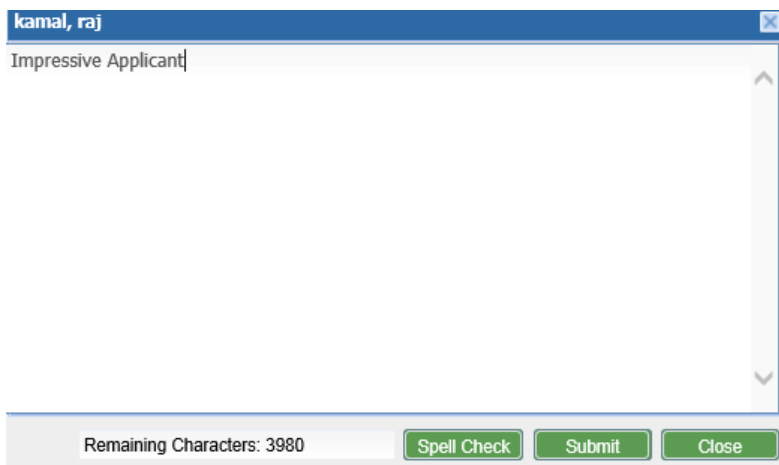
To Enter a Comment:

1. Click on the comment icon present next to the applicant name.
2. Type the comment.



A screenshot of a web-based comment entry window. The window has a blue title bar with the text "Sexton, Andrew" and a close button. Below the title bar is a large text area with the placeholder text "Type your comments here..". At the bottom of the window, there is a status bar that says "Remaining Characters: 4000" and three buttons: "Spell Check", "Submit", and "Close".

3. Click the **Spell Check** button to perform a spell check.
4. Click the **Submit** button to save the comment.
 - Note the Comment icon has changed. Click the **Comment** icon to expand the comment box for easier reading.

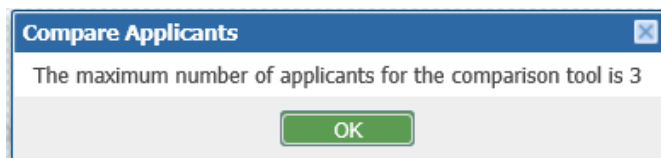
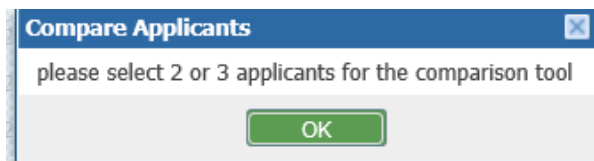


A screenshot of a web-based comment entry window. The window has a blue title bar with the text "kamal, raj" and a close button. Below the title bar is a large text area with the text "Impressive Applicant". At the bottom of the window, there is a status bar that says "Remaining Characters: 3980" and three buttons: "Spell Check", "Submit", and "Close".

Compare Applicants

To Compare Applicants:

1. Select two or three applicants from the Rank tab.
2. Select **Compare** from the Bulk Action drop-down list.
3. The window will allow users to compare the applicants. Click **Close** button to close the window.
 - The fields on which each applicant are compared were selected in the Comparison Tool Setup.
 - Only two or three applicants may be compared at a time. If a different number of applicants is selected, one of the following messages may appear:



- Here is an example of comparing two applicants:

Compare Applicants	
Jones, Sally	kamal, raj
Rank	N/A
Composite Score	0
Ranking Comments	
Most Recent Medical School	University of Arkansas for Medical Sci... Albert Einstein College of Medicine of...
<button>Close</button>	

Rank Applicants

To Rank Applicants:

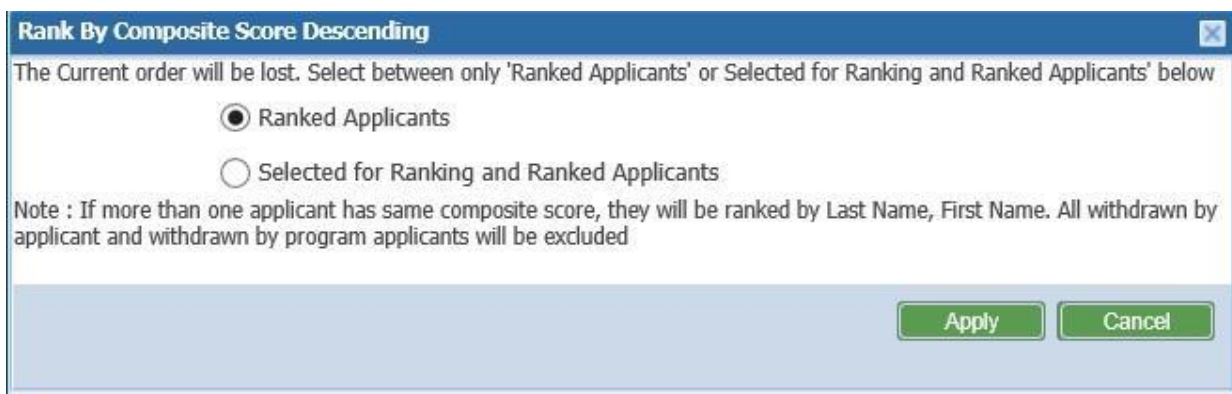
1. Select the applicant(s).
2. Use one of the following options to rank the applicant(s):
 - Drag and drop the applicant’s photo icon or the applicant’s hyperlinked name to a new position in the list.
 - Enter a rank number in the rank box and click outside the box to save the entry.

Rank (16)							
Sort on these fields: Rank Composite Score Applicant Name AAMC ID Page 1 of 1 Displaying applicants 1 - 17 of 17							
	Rank	Applicant	AAMC ID	NRMP ID	Composite Score	Tracks	Most Recent Me...
	1	Williamson, Ka...	20020316	N456122	576	Anesthesiology 1820040C0 (...)	Albert Einstein C...
	2	Warlock, Hitma...	20018588		0	Anesthesiology 1820040C0 (...)	State University o...

3. Click the **Rank by Composite Score Descending/Ascending** button(s) at the bottom to automatically rank applicants by composite score and override any existing ranks. Both buttons provide options to rank only the ranked applicants or all active applicants by their composite Score.

Rank by Composite Score Descending

Rank by Composite Score Ascending



Rank By Composite Score Descending

The Current order will be lost. Select between only 'Ranked Applicants' or Selected for Ranking and Ranked Applicants' below

☒ Ranked Applicants

☐ Selected for Ranking and Ranked Applicants

Note : If more than one applicant has same composite score, they will be ranked by Last Name, First Name. All withdrawn by applicant and withdrawn by program applicants will be excluded

View Applicant Information from Ranking

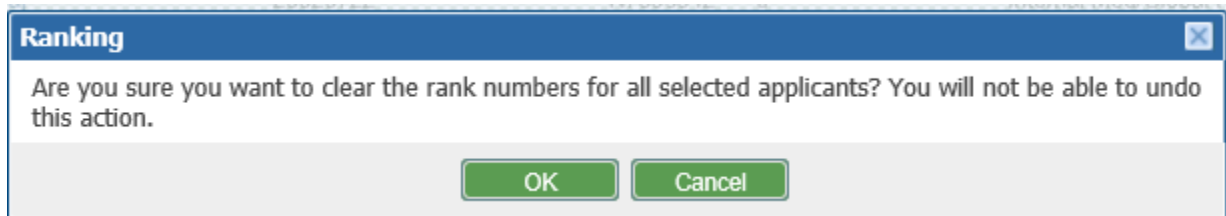
To View an Applicant’s Information from Ranking:

- Click on the applicant name to open the applicant’s application in a separate window.

Clear Rank Numbers

To Clear Rank Numbers:

- Select the applicant(s).
- Select **Clear Rank Numbers** from the Bulk Action drop-down list.
- Click the **OK** button.

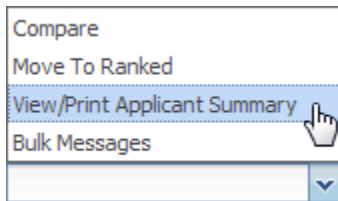


- The applicant(s) rank value is updated with N/A and the record moves along with the un-ranked applicants in the grid.

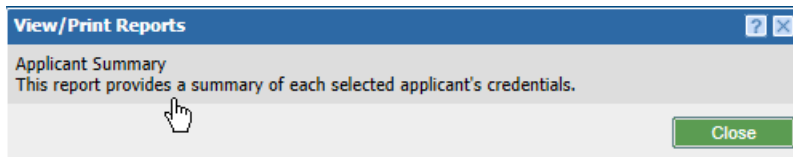
View/Print Applicant Summary Reports for Multiple Applicants

To View/Print the Applicant Summary Report for Multiple Applicants:

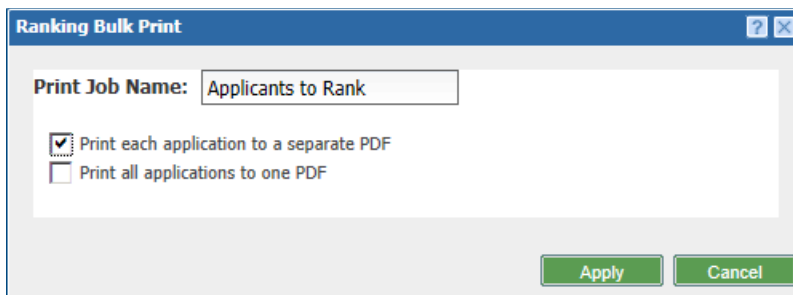
1. Select the applicant(s).
2. Select **View/Print Applicant Summary** from the Bulk Action drop-down list.



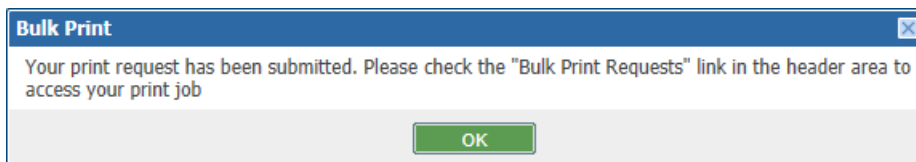
3. Click the **Apply** button.
4. Select the **Applicant Summary** report.



5. Enter a **Print Job Name**.



6. Select whether to Print each application to a separate PDF or Print all applications to one PDF.
7. Click the **Apply** button.



8. Click the **OK** button.
9. Click the **Close** button to close the View/Print Reports light box.
10. Click the **Bulk Print Request** link in the header area to access the print job.



Print Job Name	Files	User's Name	Requested Date ▼	Status
Applicants to R...	Applicants to Rank	C.Pdwsbeta	06/11/2014 11:45 pm	COMPLETE
My Ranked Ap...	My Ranked Applicants	C.Pdwsbeta	06/11/2014 11:33 pm	COMPLETE
Applicants Sele...	Applicants Selected to Hono...	C.Pdwsbeta	06/05/2014 02:20 pm	COMPLETE
Applicants Sele...	Applicants Selected to Hono...	C.Pdwsbeta	06/05/2014 02:20 pm	COMPLETE
Applicants Sele...	Applicants Selected to Hono...	C.Pdwsbeta	06/05/2014 02:16 pm	COMPLETE
test	test	C.Pdwsbeta	06/05/2014 02:12 pm	COMPLETE

11. In the Print Requests box, click the name of your print job in the Files column. The report will download to your local machine and can be opened from there.

Applicant Summary
 Categorical (Categorical (test) (Categorical))

Personal Information:
 AAMC ID: 21028617
 Full Name: Lopez, Susan FC
 Preferred Name:
 Current Address:
 2518 Oral Lake Road
 Victoria, DC
 United States
 E-mail: smyeras@aamc.org
 Preferred Phone #: 952-443-2752

Medical Information:
 Most Recent Medical School:
 Wayne State University School of Medicine
 Location: Detroit, MI, USA
 Graduation Date: 05/2013
 Degree Type: MD

Participating in the NRMP Match: Yes
Participating as a Couple in NRMP: No
Citizenship: U.S. Citizen
Most Recent Residency: None

Scores:

Score Type	Score	Weight	Total
USMLE Step 1		1.00	
USMLE Step 2 CK		1.00	
USMLE Step 2 CS		1.00	
USMLE Step 3		1.00	
COMLEX-USA Level 1		1.00	
COMLEX-USA Level 2		1.00	

Attributes:

Qualifying Experience
☐ No Medical Experience Reported.

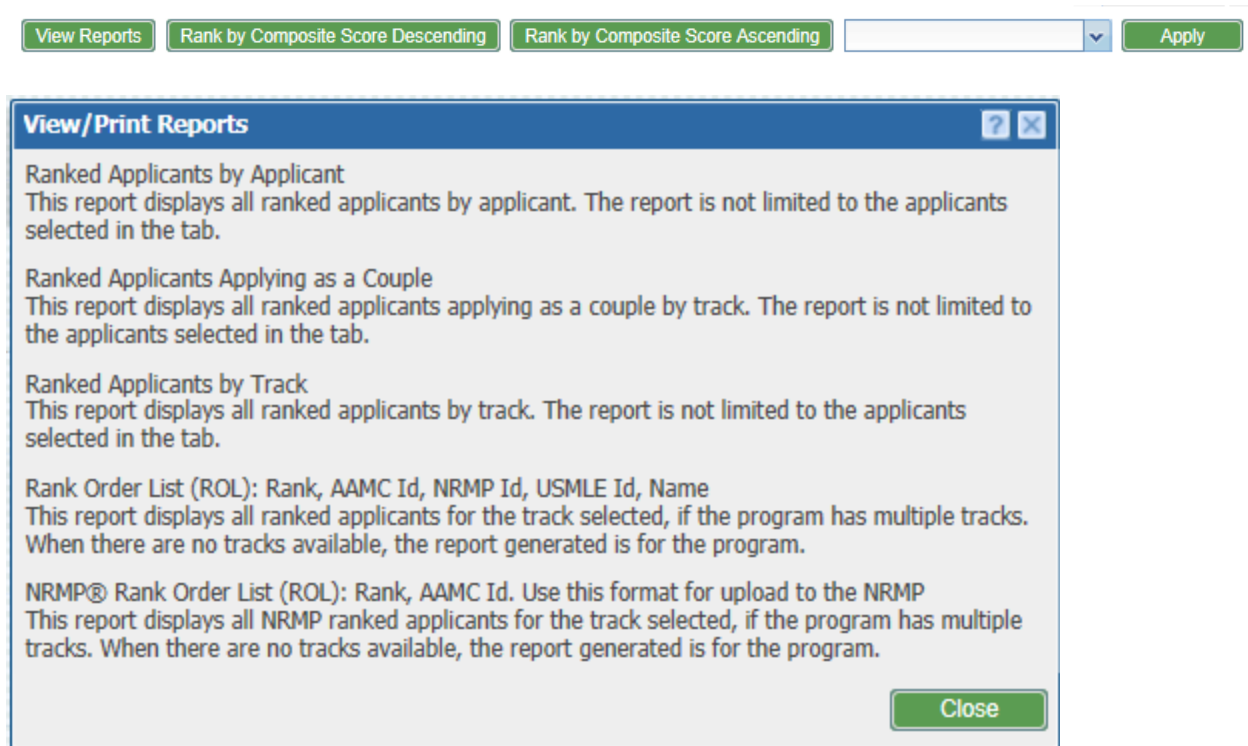
- The Adobe Reader toolbar offers buttons for saving, printing, navigating, and zooming in the PDF report.

-
- Visit <http://helpx.adobe.com/reader/using/save-view-search-pdfs.html> for help on how to use Adobe Reader.

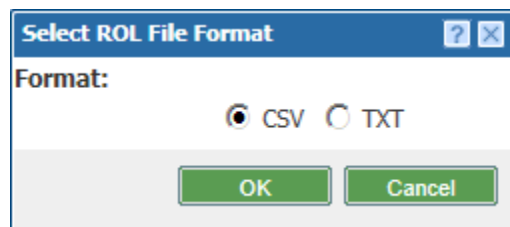
Create Rank Order List (ROL) Reports

To Create a Rank Order List (ROL) Report:

1. Click the **View Reports** button.



- If this is an Osteopathic program, the Rank Order List (ROL) will contain Rank, AOA Match Code, Last Name, First Name, Middle Name, AOA ID, AAMC ID.
2. Select either the Rank Order List (Osteopathic Programs) or NRMP Rank Order List (Allopathic Programs).
 3. Select whether the ROL File Format will be **CSV** or **TXT**.



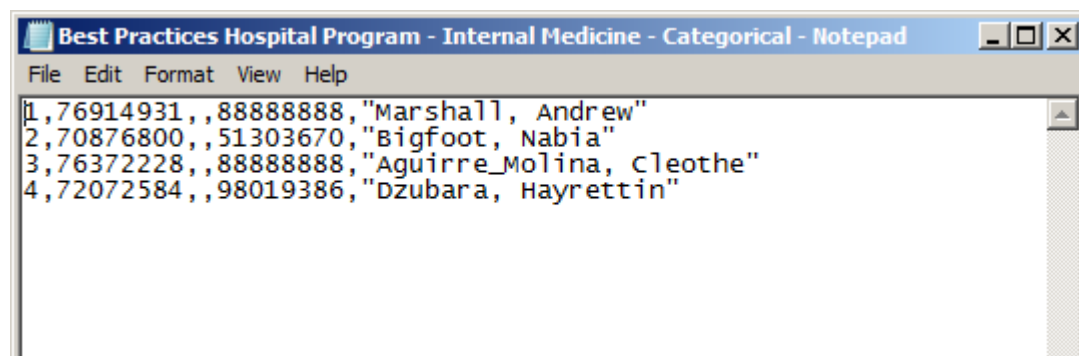
4. Click the **OK** button.
5. The report is downloaded to your local machine. Choose whether to **Open** the

file immediately or **Save** it to a specific location.

- The Rank Order List file is automatically named with the Program Name, Specialty and Track.
- Export CSV:

	A	B	C	D	E	F	G
1	Rank	AAMC ID	NRMP ID	USMLE ID	Name		
2	1	76914931		88888888	Marshall, Andrew		
3	2	70876800		51303670	Bigfoot, Nabia		
4	3	76372228		88888888	Aguirre_Molina, Cleothe		
5	4	72072584		98019386	Dzubara, Hayrettin		
6							
7							
8							

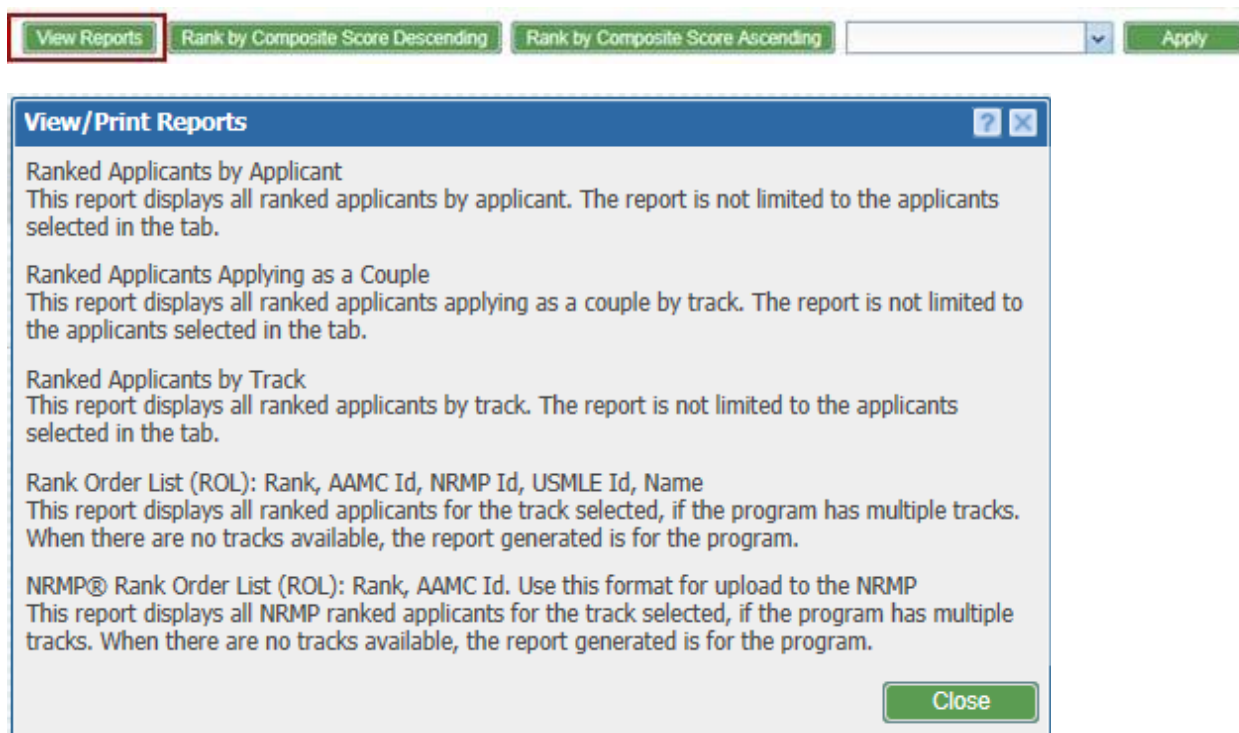
- Export TXT:



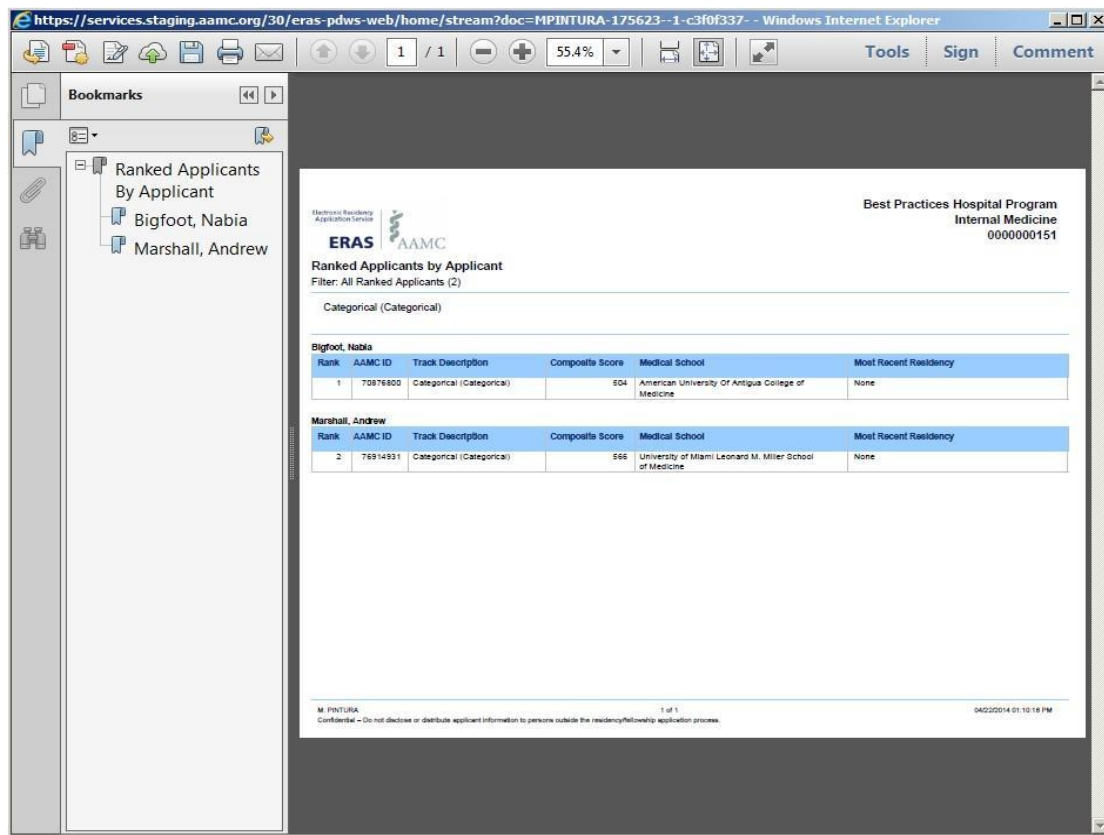
View/Print Ranking Reports

To View/Print Ranking Reports:

1. Click the **View Reports** button.



2. Select the desired report to view or print.

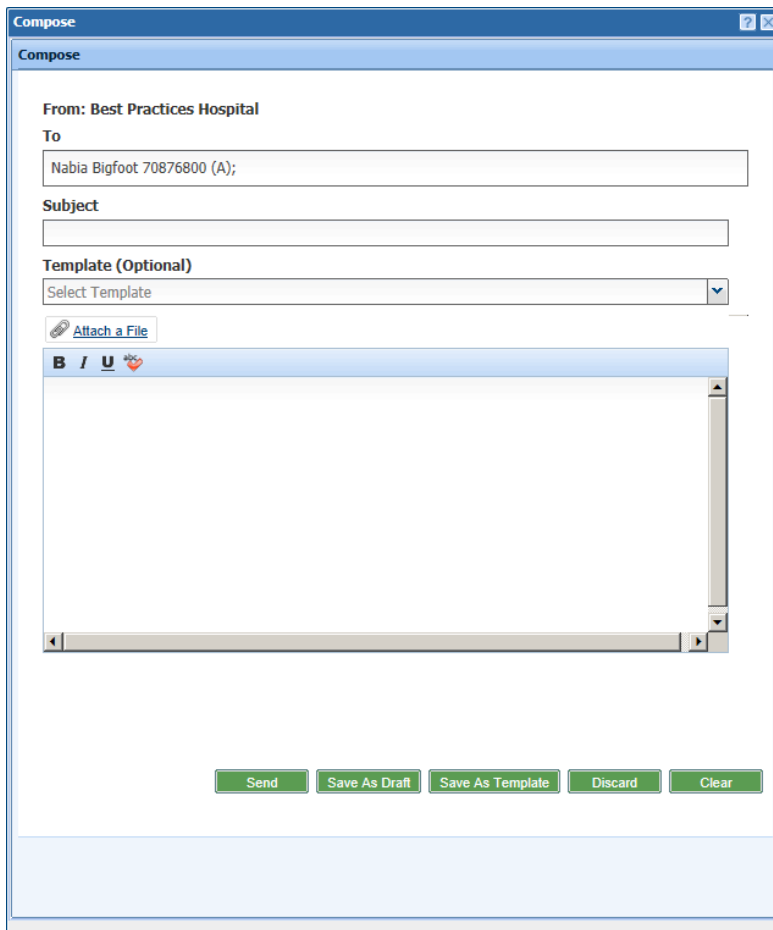


- The Adobe Reader toolbar offers buttons for saving, printing, navigating, and zooming in the PDF report.
- Visit <http://helpx.adobe.com/reader/using/save-view-search-pdfs.html> for help on how to use Adobe Reader.

Send Messages

To Send Messages:

1. Select the applicant(s).
2. Select **Bulk Messages** from the Bulk Action drop-down list.
3. Click the **Apply** button.



4. Enter a **Subject**.
5. If desired, use the **Template** option to select a pre-defined template message.
6. If desired, use the **Attach a File** link to include a document with the message.
7. Enter a message in the body.
8. Click the **Send** button.
 - Click the **Save As Draft** button to save a draft and come back and send the message later.
 - Click the **Save As Template** button to save the message as a template for future use.
 - Click the **Discard** button to exit the light box without sending the message.
 - Click the **Clear** button to clear all entered text.

(Please note: When sending a bulk message to multiple applicants, applicants are blind carbon

copied (Bcc’d) and therefore will not see other applicant’s names included in the message.

List of All Reports

Report Name	Displays the Following Information	Location in PDWS
Applicant Roster	Applicants and their most recent application status. This report will yield results based on applicants in the current filter when run from the Dashboard. This report will yield results based on selected applicants in the Applications tab.	Applications tab – View/Print Reports as Bulk Action Dashboard tab – Can be made available in Setup/Dashboard
Applicants Applying as a Couple	Applicants who have indicated they want to match as a couple and to which specialty the partner is applying. This report will yield results based on applicants in the current filter when run from the Dashboard. This report will yield results based on selected applicants in the Applications tab.	
Missing Documents	Applicants who are missing at least one standard ERAS document. This report will yield results based on applicants in the current filter when run from the Dashboard. This report will yield results based on selected applicants in the Applications tab.	
Withdrawn Applicants	Applicants who have been withdrawn from the program or by the applicant. This report will yield results based on applicants in the current filter when run from the Dashboard. This report will yield results based on selected applicants in the Applications tab.	
Applicants Selected to Honor Societies	This report indicates applicants’ membership status for Alpha Omega Alpha, Sigma Sigma Phi, and Gold Humanism Honor Society. This report will yield results based on applicants in the current filter when run from the Dashboard. This report will yield results based on selected applicants in the Applications tab.	
Applicant Summary	Summary of the applicant's quantitative and qualitative credentials. This report will yield results based on the selected applicants.	Applications tab – View/Print Applications as Bulk Action Rankings tab – View/Print Applicant Summary as Bulk Action
Applicant Summary in Ranking	Summary of the applicant's quantitative and qualitative attributes.	Rankings tab – Ranked tab – View Reports button
Ranked Applicants by Applicant	All ranked applicants. The report is not limited to the applicants that were selected in the Ranked tab.	

Ranked Applicants Applying as a Couple	All ranked applicants applying as a couple by track. The report is not limited to the applicants selected in the Ranked tab.	
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Report Name	Displays the Following Information	Location in PDWS
Ranked Applicants by Track	All ranked applicants by track. The report is not limited to the applicants selected in the Ranked tab.	
Rank Order List (ROL)	All ranked applicants based on tracks.	
NRMP® Rank Order List (ROL)	All NRMP ranked applicants based on tracks. If there are no tracks, the report is for the program.	
Role Assignments by Level	Institution and/or Program users and their active roles.	Setup tab, Manage Users – View/Print Reports
Role Assignments by Role	Institution and/or Program level active roles and the users assigned to the roles by level.	
Revoked Roles by Level	Program level roles for users that have had them revoked.	
Revoked Roles by Role	Program users and their revoked roles.	
User Management	List of users with their registration status and program role.	
Specialties/Program Assignments	All Programs/Specialties associated with the Institution. The report is shown at the Institution level and not at the program level.	
Program Activity Summary	Results of the program's application review and evaluation activities	Reports tab
Selected Applicants	List of selected applicants selected for the interview process.	Reports tab
Invited Applicants	A list selected of applicants invited to an interview.	
Waitlisted Applicants	A list of applicants waitlisted for an event(s).	
Applicant Schedule	Selected applicants' interview schedule for a specified date range.	
Scheduled Applicants	A list of applicants Scheduled for an event(s).	
Interviewed Applicants	List of selected applicants that have been interviewed.	
Declined Applicants	A list of applicants that have declined for an interview.	
View/Print Interviewer Availability	List of selected active and inactive interviewers.	Setup – Interviewer Tool
View/Print Schedule by Interviewer	Selected interviewers' interview schedule for a specified date range, sorted by interviewer.	

View/Print Schedule by Date	Selected interviewers' interview schedule for a specified date range, sorted by date.	
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Program Message Center

Each program has a message center that is set up in PDWS. Messages can be managed, including composed and replied to, by Program Super Users and Program Coordinators. A Program Coordinator Read-Only can view sent and received messages, but is not able to send messages. Tasks that can be performed by Super Users and Program Users include:

- Composing a message
- Saving a message as draft or template
- Modifying a message
- Viewing a message
- Printing a message
- Replying to a message
- Moving a message to trash
- Deleting a message

Applicants

Applicants receive an email message from the PDWS program message center at the email address they provided on their MyERAS application.

The email will contain the content of the MyERAS message, but applicants will need to log into MyERAS to access attachments and reply to the message.

Applicants cannot initiate messages to a program from MyERAS.

Accessing the Program Message Center

The Program Message Center is accessible from the following areas of PDWS:

Program Messages tab	Users can go directly to the Program Message Center by selecting the Program Messages tab.
Applications tab	When the applicant email address (located in the header of the application) is clicked, the Compose light box opens with the “To” address field pre-populated.
Filter results	When a filter is applied and results are obtained, a bulk action of Send Messages can be used. The Compose light box opens with the “To” address field pre-populated with all selected applicants.
Scheduler	Messages are sent to applicants and interviewers using the bulk action of Send Message. Messages can include invitations to applicants for interviews, confirmation messages to scheduled applicants.
Rankings tab	Messages are sent to ranked applicants and applicants selected for ranking using the bulk action of Bulk Messages.

Folders



Folder listing:

Compose	Starts a new message to an applicant. Type the Applicant Name (the field uses predictive text based on letters being typed), the AAMC ID or AOA ID.
Inbox	Displays messages from applicants. The three subfolders can be renamed for a program’s organizational purposes.
Sent	Contains messages sent to applicants and interviewers.
Drafts	Contains messages started and saved as drafts.
Templates	Contains message templates for frequently sent messages. Programs can create up to 250 message templates.
Trash	Messages can be moved back into other folders, such as the Inbox, which restores the message. Messages deleted from the Trash folder are permanently erased.

Composing and Sending Messages

To Compose and Send a Message:

1. Click **Compose** from within the Program Messages tab or access the Compose light box from another area of the PDWS (see Accessing the Program Message Center on page 179).
 - If the Compose light box was accessed from another area of the PDWS, the To field is automatically populated with the applicant(s) or interviewer(s) address(es). If Compose is selected from the Program Messages tab, recipients are manually entered (the **To** box uses predictive text based on letters being typed).
 - Additional recipients can be entered manually. Applicants and interviewers are all blind carbon copied or bcc'ed, so they cannot view the other message recipients.
 - The **From** field is automatically populated with the Program Name.

Compose

From: Best Practices Hospital Program

To

Subject

Selected to Interview

Template (Optional)

Select Template

[Attach a File](#)

B I U

Congratulations! You have been selected to interview with the Internal Medicine Program at Best Practices Hospital. we will be in touch shortly to schedule the interview.

Marcella Pintura
Administrative Coordinator
Best Practices Hospital

2. Enter a **Subject** and **Message**; both text boxes must be entered to send a message.
 - Special formatting (bold, underline, italics) as well as spell check with a medical dictionary is available.
 - Use the **Template** option to select a pre-defined template message.
 - Use the **Attach a File** link to include one or more documents with the message. The attached file must be in PDF format, and the combined file size cannot exceed 5 MB.
3. Click the **Send** button to send the message to recipients.

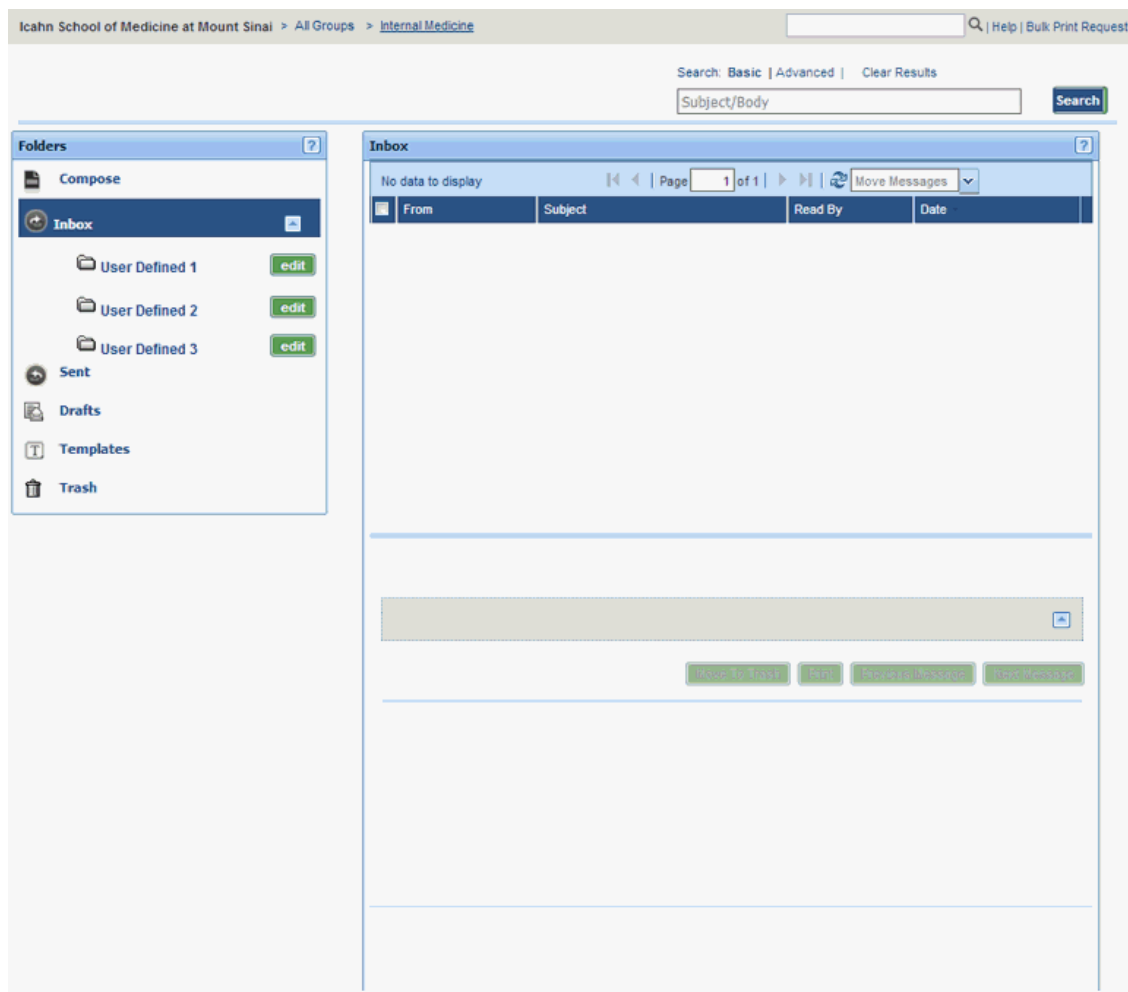
- Use the **Save As Draft** button to save the message to the draft folder and send at a later time.
- Use the **Save As Template** button to save the message as a template for future use. Enter a template name; otherwise, the Subject line will be used as the template name.
- Use the **Discard** button to exit without saving or sending the message.
- Use the **Clear** button to clear data from all of the text boxes, except for the From field.

Email Tracking

- PDWS tracks messages sent to the applicant on the Communication tab within the Evaluate Application section of the application.
- If the applicant responds to the message via MyERAS, the system also tracks the response in the Communication tab.

Inbox

The Inbox displays the following columns: From, Subject, Read by, and Date. A message displayed in bold denotes an unread message.



Directly from the Inbox, users can:

- Reply to a message.
- Print a message.
- Move a message to the trash or any user-defined folder.
- Navigate to the next or previous message.

Searching for Messages

Use the Basic or Advanced search options to find messages by subject, message content, applicant name, or date range. The Basic option searches only within the subject or message content. Use the Advanced option to search by subject, message content, applicant name, or date range.

Basic Search

- Messages can only be searched by subject or message content.
- Basic searches are performed across all Program Message Center folders.
- A minimum of four characters must be entered in the search

field. Advanced Search

- Messages can be searched by subject, message content, applicant name, or date range.
- Advanced searches are performed across all Program Message Center folders.
- A minimum of four characters must be entered in the search field.

To Perform a Basic Search for Messages:

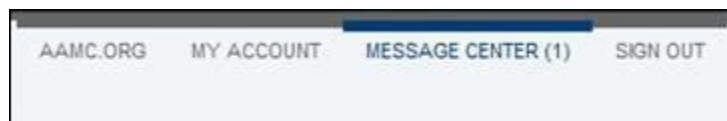
1. Click the **Search: Basic** link.
2. In the search box, type the text to find in the subject or message body.
3. Click the **Search** button.
 - Messages meeting the search criteria display in the Inbox.
 - Click the Clear Results link to return to the Inbox.

To Perform an Advanced Search for Messages:

1. Click the **Search: Advanced** link.
2. In the search box, type the text to find in the subject or message body.
3. In the Sender/Recipient search box, type the name of the individual you are searching for.
4. In the From and/or To box, select a date range to limit the search.
 - Either a Sender/Recipient or date range is needed, but not both.
5. Click the **Search** button.
 - Messages meeting the search criteria will display in the Inbox.
 - Click the Clear Results link to return to the Inbox.

AAMC Message Center

The AAMC Message Center is an individual communication tool for anyone who has set up an AAMC account. It can be accessed from within the PDWS. Messages sent to interviewers are delivered to their AAMC Message Center.



Setup

The Setup tab provides a central location for those with the appropriate permissions to set up program defaults and manage users. Institutions define settings for RMS Selection, data filter settings and manage users. Programs define settings for program data filters, applications, scheduling, and ranking based on their selection policy and requirements. Programs also define user roles, which determine what program staff can do in the PDWS.

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The major tasks performed in Setup include:

- Determining which items are screened during the application evaluation process.
- Adding statuses and scores to display when evaluating applicants.
- Creating searchable data fields specific to your program, known as attributes.
- Assigning user roles.
- Setting up the ranking comparison tool.
- Using the History Log – Program Super Users can access a Setup history log to view changes that have been made and who made them by clicking the History link.

Dashboard

Data Filter

This option allows the Institution Super User, Alternate Institution Super User, Program Super User, or Alternate Program Super User to determine which sensitive data items are viewable during the application evaluation process. By default, all data listed in the Screened box are not shown on applications, reports, and filters. Items can be moved to the Viewable list to make them visible on applications, reports, and filters.

The Data Filter allows you to screen sensitive information from view during the application evaluation process. Data in the Screened box will not be shown in the application, reports or filters. Hold the Ctrl key (Command key for Mac users) to select multiple items.

The screenshot shows a dialog box titled 'Data Filter' with two main sections: 'Screened' and 'Viewable'. The 'Screened' section on the left contains a list of items: Birth Place, Felony Conviction, Gender, Limitations, Misdemeanor Conviction, and Self Identification. The 'Viewable' section on the right contains a list of items: Birth Date, Citizenship, Photograph, and Visa Status. Between the two sections are two small square buttons with right and left arrows. At the bottom right of the dialog box are two green buttons labeled 'Apply' and 'Cancel'.

Screened	Viewable
Birth Place	Birth Date
Felony Conviction	Citizenship
Gender	Photograph
Limitations	Visa Status
Misdemeanor Conviction	
Self Identification	

Apply Cancel

Reports

Use this option to determine which reports to display on the Dashboard.

Select up to 6 reports to display on the Dashboard. Hold the Ctrl key (Command key for Mac users) to select multiple items.

The screenshot displays a web interface for selecting reports. It consists of two main panels within a light blue border. The left panel, titled 'Available Reports' in a dark blue header, contains a list of five report types: 'Applicant Roster', 'Applicants Applying as a Couple', 'Applicants Selected to Honor Societies', 'Withdrawn Applicants', and 'Missing Documents'. The 'Missing Documents' item is currently selected, highlighted with a light gray background. The right panel, titled 'Reports to be Displayed(0/6)' in a dark blue header, is currently empty. Between the two panels is a vertical column of four small square buttons with arrows: an up arrow, a right arrow, a left arrow, and a down arrow, used for navigating the selection list.

RMS Selection

This option allows the Institution Super User(ISU) and Alternate Institution Super User(AISU) to allow programs to allow match applicant data to be made available to a residency management system(s) such as E*Value, MedHub, MyEvaluations.com or New Innovations. ISUs and AISUs must toggle to the Institutional level in order to access the RMS Selection options. Institutions that opt to authorize applicant data availability can select one RMS vendor for all programs or indicate a vendor(s) for specific program(s).

Select Apply to save changes.

Note: For the RMS vendor to have access to ERAS data, programs will need to mark the status of all incoming applicants as “Will Start.” Programs then need to request the data from the RMS vendor portal.

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The ERAS PDWS Data Exchange Service is a web service facilitated by AAMC/ERAS to exchange applicant, placement, and performance data between the AAMC and residency management systems (RMS) operated by vendors on behalf of ERAS participating programs.

1. Do you authorize AAMC to exchange your Institution's ERAS data to the one or more of the RMS vendors (E*Value, New Innovations, MedHub, MyEvaluations.com) that you select below via the ERAS PDWS Data Exchange Service? You will be able to select the specific RMS vendor(s) in subsequent questions.

☒ Yes ☐ No

2. Does your institution use the same RMS vendor for all programs?

☒ Yes ☐ No

Vendors:

☒ E*Value
 ☐ MedHub
 ☐ MyEvaluations.com
 ☐ New Innovations

[Apply](#)

The ERAS PDWS Data Exchange Service is a web service facilitated by AAMC/ERAS to exchange applicant, placement, and performance data between the AAMC and residency management systems (RMS) operated by vendors on behalf of ERAS participating programs.

1. Do you authorize AAMC to exchange your Institution's ERAS data to the one or more of the RMS vendors (E*Value, New Innovations, MedHub, MyEvaluations.com) that you select below via the ERAS PDWS Data Exchange Service? You will be able to select the specific RMS vendor(s) in subsequent questions.

☒ Yes ☐ No

2. Does your institution use the same RMS vendor for all programs?

☐ Yes ☒ No

Programs	
AAMC/ERAS Colon and Rectal Surgery Program1 (Testing Only) - Colon and Rectal Surgery	
Accreditation ID: 0000000024	<input type="checkbox"/> E*Value <input checked="" type="checkbox"/> MedHub <input type="checkbox"/> MyEvaluations.com <input type="checkbox"/> New Innovations
AAMC/ERAS Colon and Rectal Surgery Program2 (Testing Only) - Colon and Rectal Surgery	
Accreditation ID: 0000000025	<input type="checkbox"/> E*Value <input type="checkbox"/> MedHub <input checked="" type="checkbox"/> MyEvaluations.com <input type="checkbox"/> New Innovations
AAMC/ERAS Emergency Medicine Program (Testing Only) - Emergency Medicine	
Accreditation ID: 0000000037	<input type="checkbox"/> E*Value <input type="checkbox"/> MedHub <input type="checkbox"/> MyEvaluations.com <input type="checkbox"/> New Innovations

Applications

The following links are available to customize specific application information:

- [Statuses](#)
- [Scores](#)
- [Attributes](#)

Statuses

An application’s status specifies where an application is in the application review, interview scheduling, and ranking process. The statuses display in the Evaluate Applicant Panel for each application.



The screenshot shows a web interface for the 'Evaluate Applicant Panel'. At the top, there are four tabs: 'Status' (selected), 'Interviews', 'Reviewers', and 'Communication'. Below these, there are three more tabs: 'Attributes', 'Notes', and 'Scores'. The main content area is a table with four rows, each representing a different status type. Each row has a label on the left and a dropdown arrow on the right. The rows are: 'Application Status', 'Ranking Status', 'Interview Status', and 'Custom Status'. A question mark icon is visible in the top right corner of the table area.

Status	Interviews	Reviewers	Communication
Attributes	Notes	Scores	
Application Status			
Ranking Status			
Interview Status			
Custom Status			

Three status types contain pre-defined statuses:

- Application
- Interview
- Ranking

A new status may be added to the Custom status type. Program Super Users, Alternate Program Super Users, and Program Coordinators can add user-defined statuses to the Application, Interview, and Ranking status types, or create a status under the Custom type. Once added, the statuses appear in the Application’s header information and become filterable fields.

Application	
Application Reviewed	
On Hold	
Incomplete Application	
Complete Application	
Inactive	
Withdrawn by Program	
Withdrawn by Applicant	
Will Start	
<div>Move Up Move Down Add Edit Remove</div>	

Interview	
Selected to Interview	
Invited to Interview	
Waitlisted for Interview	
Scheduled for Interview	
Removed from Schedule	
No Show	
Interviewed	
<div>Move Up Move Down Add Edit Remove</div>	

Ranking	
Selected for Ranking	
Ranked	
<div>Move Up Move Down Add Edit Remove</div>	

Custom	
<div>Move Up Move Down Add Edit Remove</div>	

Manage Statuses

- Status names have a maximum of 25 characters.
- Up to 10 user-defined statuses can be added total, among all types of statuses.
- User-defined statuses can be:
 - o Added to existing types (Application, Interview, Ranking) or created under Custom status.
 - o Edited within the group.
 - o Reordered
 - . o Renamed.
 - o Deleted.
- Statuses cannot be deleted if:
 - o The field has been given a value for at least one application.
 - o The field has been saved in a filter.
 - o The status is system-defined.

To Add a Status:

1. Click the **Add** button for the appropriate status type (Application, Interview, Ranking, Custom).
2. Type the status name.
3. Click anywhere else on the page, or press the Enter key. The status is automatically created.

To Edit a Status:

1. Select the status to edit.
2. Click the **Edit** button.
3. Begin typing to rename the status.

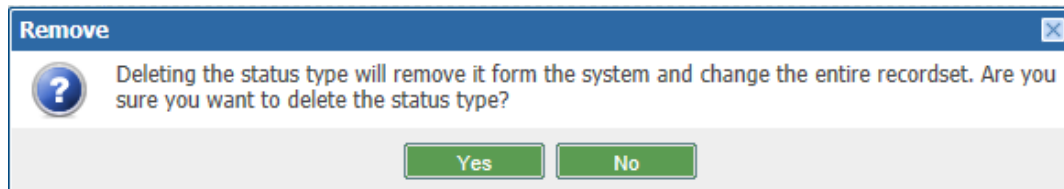
4. Click anywhere else on the page, or press the Enter key. The new status name is automatically saved.
 - Only user-defined statuses can be edited.
 - Statuses cannot share the same name.

To Reorder the Status List:

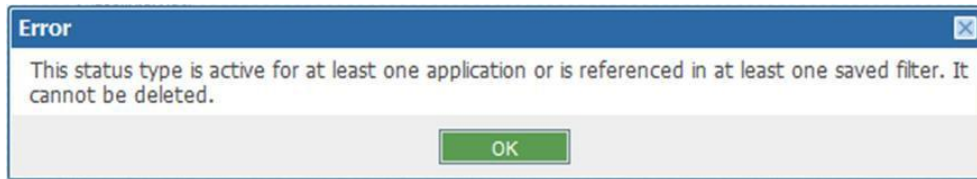
1. Select the status to move.
2. Click the **Move Up** or **Move Down** buttons to move the status up or down within the list.
 - Both system and user-defined statuses may be reordered.
 - Reordering also appear in the **Status** tab of the Evaluate Application panel on the **Applications** tab.

To Delete a Status:

1. Select the status to delete.
2. Click the **Remove** button.



3. Click the **Yes** button to confirm deletion.
 - Statuses cannot be deleted if:
 - o The field has been given a value for at least one application.
 - o The field has been saved in a filter.
 - o The status is system-defined.



Scores

During setup, which usually occurs at the beginning of the season, Program Super Users and Program Coordinator 1s define and adjust scores and weights to reflect a program’s selection requirements and criteria. The PDWS automatically calculates the weighted score for each score entered on the Applications tab. At any time, scores and associated weights can be edited or added. Programs can choose which scores are included in the composite score from this location. Once added, the custom scores appear in the **Scores** tab of the Evaluate Application panel on the **Applications** tab.

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Board Scores

Score Type	Weight	Included in Composite
USMLE Step 1	2.00	<input checked="" type="checkbox"/>
USMLE Step 2 CK	1.00	<input type="checkbox"/>
USMLE Step 2 CS		
USMLE Step 3	1.00	<input type="checkbox"/>
COMLEX-USA Level 1	1.00	<input type="checkbox"/>
COMLEX-USA Level 2 CE	1.00	<input type="checkbox"/>
COMLEX-USA Level 2 PE		
COMLEX-USA Level 3	1.00	<input type="checkbox"/>

Add

Edit

Remove

Documents Scores

Score Type	Weight	Included in Composite
LoR	1.00	<input type="checkbox"/>
Dept. Chair LoR	1.00	<input type="checkbox"/>
PD LoR	2.00	<input checked="" type="checkbox"/>
Personal Statement	1.00	<input type="checkbox"/>

Notes:

- Score names have a maximum of 25 characters.
- Up to 25 user-defined scores can be added.
- Weight and score ranges must be between 0.01 and 999.99.
- Scores can be:
 - o Added/Created.
 - o Edited.
 - o Renamed.
 - o Deleted.
- Scores cannot be deleted if:
 - o The score has been given a value for at least one application.
 - o The score has been used as part of a filter.
 - o The score is system-defined.
 - o Interview Custom Scores, once added, can be included in the calculation of the Total/Average Interview Score, in the Applications tab under the Scores tab.

Status	Interviews	Reviewers	Communication
Attributes	Notes	Scores	
?			
Composite Score - 170			
Score Type	Score	Weight	Total
USMLE Step 1		x 1.00	
Average Interview		x 1.00	
Total Interview		x 1.00	
Average Reviewer	85	x 1.00	85
Total Reviewer	85	x 1.00	85
Board Scores			
Documents Scores			
Interview Scores			
Reviewer Scores			
Custom Score(s)			

To Add a Score:

1. In the appropriate score group (Board, Documents, Interview, Reviewer or Custom), click the **Add** button.

Custom Scores		
Score Type	Weight	Included in Composite
Prefers Smaller Setting	1.00	<input checked="" type="checkbox"/>

Move Up
Move Down
Add
Edit
Remove

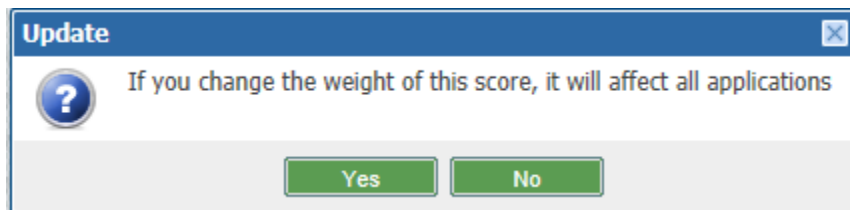
2. Enter the score name, and then click anywhere else on the page, or press the Enter key.

-
3. Enter the score weight.

- By default, the score weight is 1.00, and can be changed as needed.
 - Score weight must be in the range of .01 – 999.99
4. Mark whether the score will be included in the composite score when comparing applicants for ranking.
 5. Custom scores under Interviewer and Reviewer can be included in the total and average scores that appear under the Scores tab.

To Edit a Score or Change the Weight of a Score:

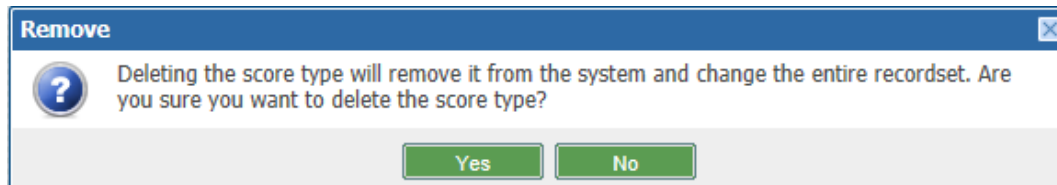
1. Select the appropriate score.
2. Click the **Edit** button or double-click the default 1.00 weight.
3. Change the weight or inclusion of the status in the composite score. Weights can range from .99 to 999.99
4. Press the Enter key.



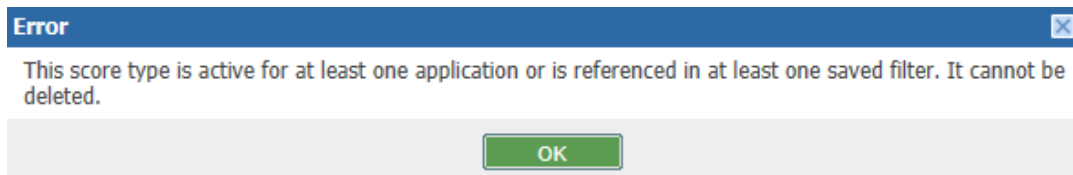
5. Click the **Yes** button.
 - System-defined score names cannot be edited.
 - Changes save automatically.

To Delete a Score:

1. Select the score to delete.
2. Click the **Remove** button.
3. Click the **Yes** button to confirm deletion.



- Scores cannot be deleted if:
 - o The score has been given a value for at least one application.
 - o The score has been used as part of a filter.
 - o The score is system-defined.



Attributes

An attribute is a user-defined data field used by a program to track additional information on applicants. Program Super Users, Alternate Program Super Users, and Program Coordinator 1s can create Checkbox, Textbox, Date, or Drop-down attributes at any time throughout the season.

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Urban Experience

Away Rotation

Need LoR

Move Up

Move Down

Add

Activate

Deactivate

Textbox

Recommended By

Move Up

Move Down

Add

Activate

Deactivate

Date

Resident Shadowing

Move Up

Move Down

Add

Activate

Deactivate

Dropdown

Med School Grades

Hotel

Move Up

Move Down

Add

Activate

Deactivate

Below are examples of attributes:

- Research Experience – a text field that tracks an applicant’s research specialty interest (e.g., Cardiology, Infectious Diseases, etc.).
- Resident Shadowing date – a calendar date that tracks when an applicant will shadow a current resident.
- Hotel List for interviewees – a drop-down list that tracks which hotel each applicant will be staying in.
- Urban Experience – a checkbox that tracks whether or not an applicant has experience in an urban setting.

Once a new attribute is defined, it is viewable from the **Attributes** tab in the Evaluate Application panel.

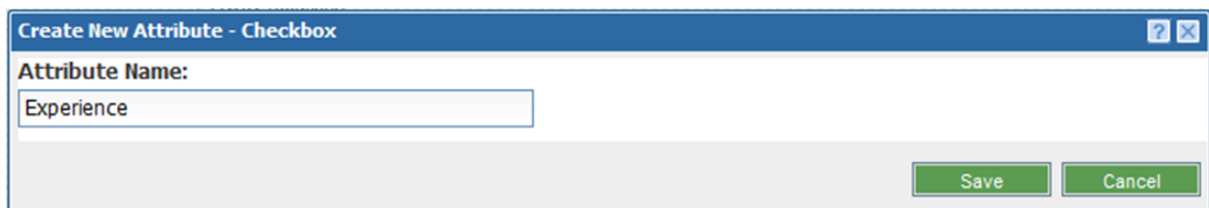
Manage Attributes

- The Program Super Users, Alternate Program Super Users, and Program Coordinator 1s can create attributes with the following display types:
 - Checkbox (Checked or Unchecked)
 - Textbox (Free alpha+numeric text)
 - Date (Entered via pop-up calendar)
 - Drop-down list (Can include up to 10 values)
- Attributes can be:
 - Added
 - Edited
 - Activated
 - Deactivated – If an attribute is deactivated, it will not be available for new applicants. A message box appears stating this and then prompts to continue. Once deactivated, the attribute is grayed out on the **Attributes** tab and can only be used to filter for the applicants who were previously associated with the attribute.
 - Deleted

- Attribute names have a maximum of 35 characters.
- Up to 100 attributes can be added in the PDWS.
- Once added, Attributes are available for filtering.
- Attributes cannot be deleted once they have been given a value for at least one application or if they have been used as part of a filter.

To Add a Checkbox, Textbox, or Date Attribute:

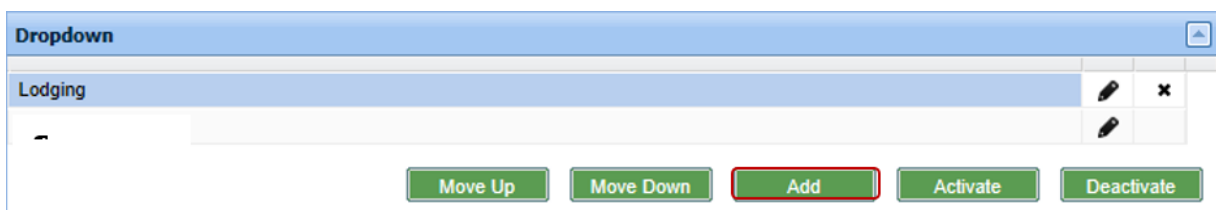
1. Click the **Add** button for the appropriate attribute type.
2. Enter the attribute name.



3. Click the **Save** button.

To Add a Drop-down Attribute:

1. In the Drop-down panel, click the **Add** button.



2. Enter the **Attribute Name**.
3. Enter each value that should appear in this drop-down.

Edit New Attribute - Dropdown

Attribute Name:
Med School Grades

Enter values that should appear in this dropdown:

Pass		
High Pass		
Honors		

This is how the attribute drop down will appear:

Pass
High Pass
Honors

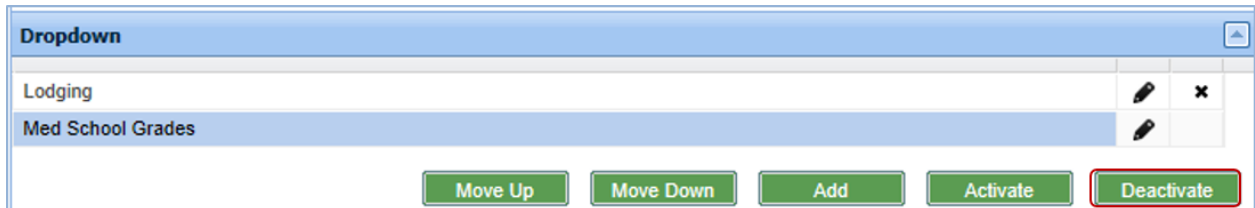
Move Up Move Down Activate Deactivate

Save Cancel

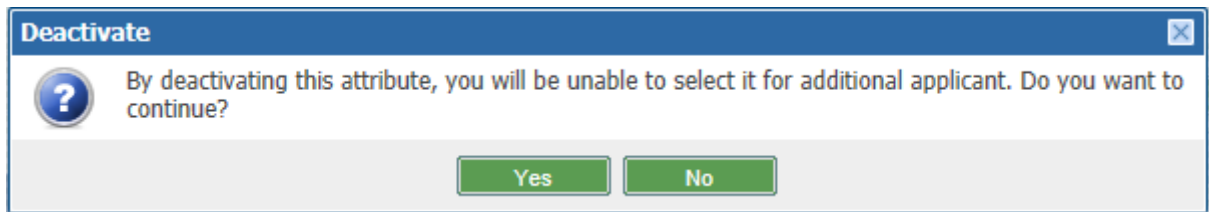
- Click the **Edit** icon and enter the text you want to display in the drop-down list. Press the Tab key to move to the next field.
 - Use the **Move Up** and **Move Down** buttons to change the order in which the drop-down values display in the list.
 - Use the **Delete** icon to delete a value.
- After entering all the values, view a preview of the list by clicking the drop-down arrow.
 - Click the **Save** button when finished.
 - All attributes are active by default.

To Deactivate/Reactivate an Attribute:

1. Select the attribute to deactivate.
2. Click the **Deactivate** button.





3. Click the **Yes** button to confirm deactivation.



- To reactivate, select the appropriate attribute and click the **Activate** button.

Note: Deactivated attributes can still be used in filters, and the results will include applicants who had data entered prior to deactivation; however, deactivated attributes cannot be used for any additional applicants.

To Modify an Attribute:

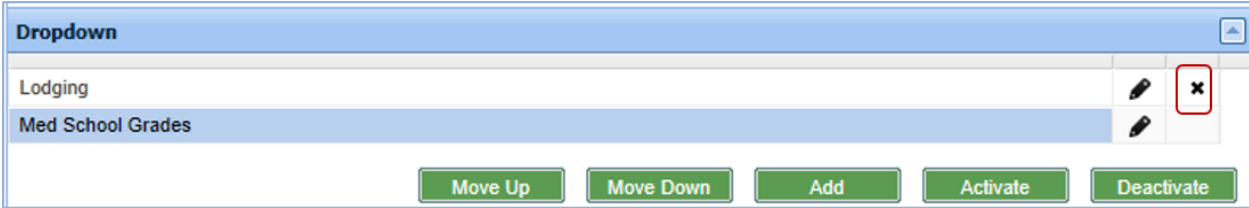
1. Select the attribute to edit.
2.   Click the **Edit** icon next to the value to modify.
3. Make the desired changes.
4. Click the **Save** button.

To Delete an Attribute:

1. Select the attribute to delete.

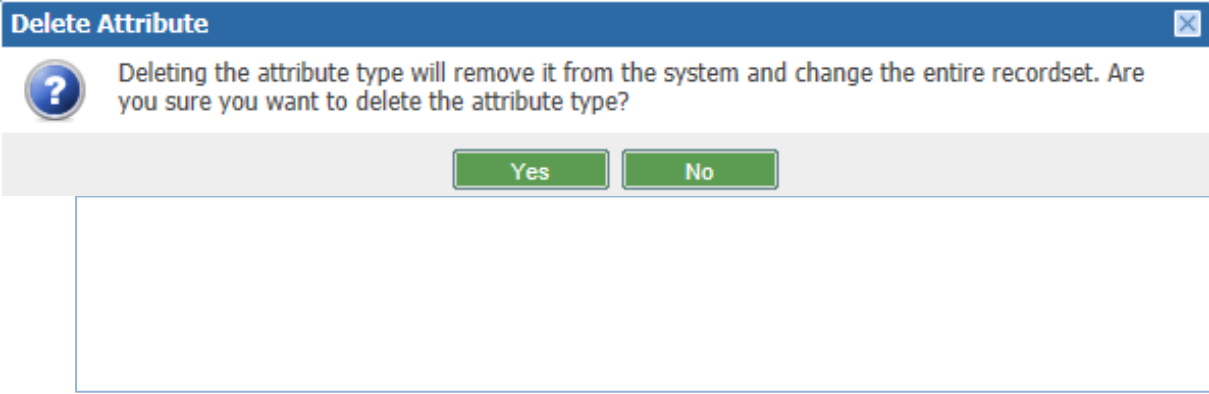
Note: If the Delete icon does not appear, applicant data has been entered for that attribute or it has been used in a filter, and it cannot be deleted.

2.  Click the **Delete** icon next to the attribute.



The screenshot shows a 'Dropdown' menu with two attributes: 'Lodging' and 'Med School Grades'. To the right of each attribute is a small icon of a pencil and a square button with an 'x' (the delete icon). The 'Med School Grades' row is highlighted in blue, and its delete icon is circled in red. Below the list are five buttons: 'Move Up', 'Move Down', 'Add', 'Activate', and 'Deactivate'.

3. Click the **Yes** button to confirm deletion.



The screenshot shows a 'Delete Attribute' dialog box. It has a blue header bar with the title 'Delete Attribute' and a close button. Below the header is a question mark icon in a circle, followed by the text: 'Deleting the attribute type will remove it from the system and change the entire recordset. Are you sure you want to delete the attribute type?'. At the bottom of the dialog are two buttons: 'Yes' and 'No'.

Interviewer Tool

The Interviewer tool in Setup allows Program Super Users, Alternate Program Super Users and Program Coordinators to do the following:

- Create User-Defined Interviewers, interviewers who will not access the PDWS.
- Set up availability for the season for both AAMC Registered Interviewers and User- Defined Interviewers.
- Display interviewer availability in two different views: by interviewer and by date.
- Use the bulk action to view/print reports, add available dates, and mark interviewers as available or unavailable.

Users

The Users section is used to manage users, permissions, roles and groups.

Only Institution Super Users, Program Super Users, and Program Coordinators 1 can assign user roles.

User Management Process:

Step	Location in PDWS
1. Send invitation to user.	Manage Users
2. New users are invited to register for an AAMC Account or existing users are given new roles.	Manage Users
3. A complete list of users can be viewed by registration status.	Manage Users
4. A user can view his/her assigned role(s) and user ID.	My Role
5. If roles change, a user’s role may be revoked.	Manage Users

Manage Users

Invited, active, expired and revoked users are displayed in the Manage Users section. Use the Search by Name, Email or Role or View by Status feature to find a specific user or group of users.

Manage Users

Search

Search by Name, Email or Role

Search

View by Status

All

Invite User

Displaying Results 1 - 1 of 1

Page 1 of 1

User's Name	Status	As of Date
<div><div>Lowman, Patrick</div><div>Email: acaakefi@amask.org</div><div>Last Login: 12/01/2015 05:49:54 PM</div><div>Assign Role</div></div>	Active INSTITUTION_SUPER_USER	09/04/2015 Revoke

The User Management screen is used to:

- Invite new users and assign a role .
- Locate a current user by Name, Email or Role.
- View users by Name, Status and Date.
- View/Print user management reports.
- Revoke user roles.

To Invite a new user:

1. Click the **Invite User** button from the Manage Users page.

The screenshot shows the 'Manage Users' interface. At the top, there is a search section with a text input field containing 'Search by Name, Email or Role', a green 'Search' button, and a 'View by Status' dropdown menu set to 'All'. To the right of the search section is a green 'Invite User' button. Below the search section is a large, empty rectangular box, likely for displaying user information or a list of users.

2. Enter the following criteria: First Name, Last Name and E-mail.
3. Select a Role from the list of System-Defined roles to assign.
4. Click the **Invite User** button.
 - The system sends an email to the new user and changes the user’s status to Invited.
 - The invited user receives an email invitation with a link to the PDWS and instructions to:
 - o Register for an AAMC account or log in with an existing AAMC account.
 - o Verify their email account (only if a new AAMC account was created). The user’s status will change to “verified”.
 - After the user logs into PDWS and accepts the *Terms and Conditions*, the user will be able to access the system and their status will change to “active”. Users who accept their invitation, but do not log into the PDWS will show as “verified”.

Instructions for the Invitee:

1. Open the email with the subject: You have been invited to create an account with the AAMC and click the link in the body of the message.
 - The **AAMC Sign In** screen appears.
2. If you already have an AAMC Account, log in. If access code email appears, put in the invitee’s email. Otherwise, click the **Register for an AAMC Account** link.
 - The Register for an AAMC Account screen appears.

-
3. Click the Register for an AAMC Account link again.
 4. Your **First Name** and **Last Name** appear on the screen. Enter a Middle Name, Suffix, and Sex if desired, and then click the **Next** button.
 5. Fill in the following required fields:

- User Name
 - Email
 - Confirm Email
 - Three Security Questions and Answers
 - Password
 - Confirm Password
6. Click the check box to accept the Privacy Statement and the AAMC Web site Terms and Conditions.
 7. Click **Register**.
 - A message appears indicating that a message was sent to confirm the email address.
 8. If a new account user, open the email with the Subject: **Complete Your AAMC Account Registration**.
 9. To complete the registration, click the link in the body of the message.
 - The **Account Verified** screen appears with a link to **Sign in**.
 10. Click the **Sign in** link.
 11. Log in and accept the terms to use the PDWS.
 12. The previous registration links that were contained in the email invitation have become deactivated, so bookmark the [ERAS PDWS link](#) for future access.

To Search for a User by Name, Email or Role:

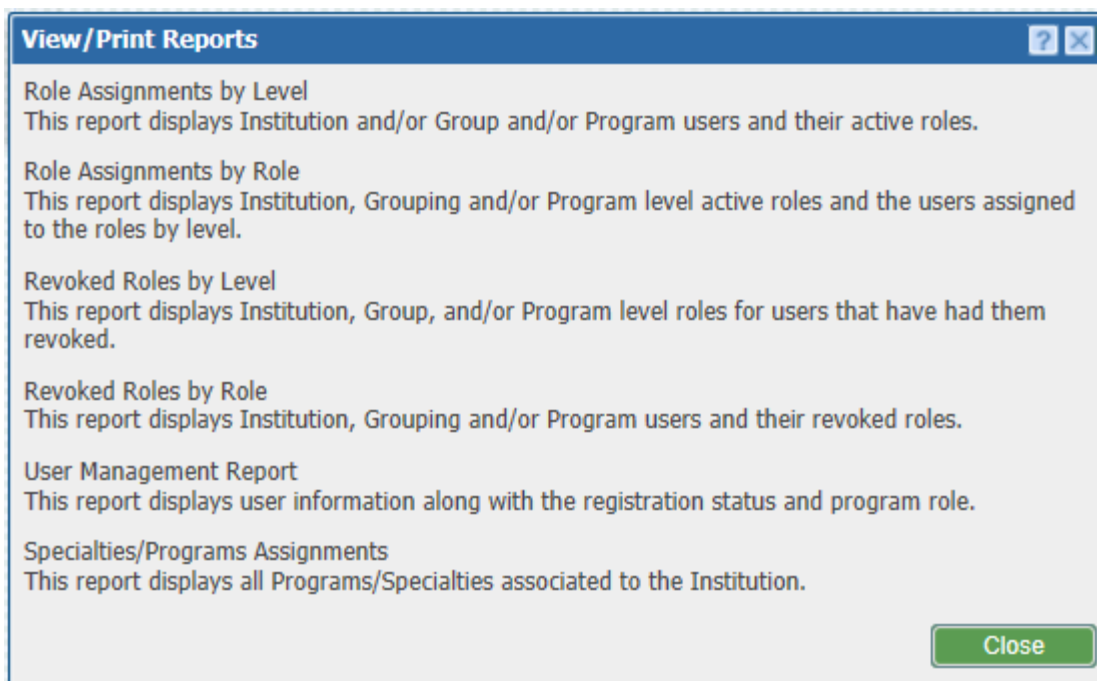
1. Click in the **Search** box.
2. Type the part of user’s first name, last name, Email or Role.
3. Click the **Search** button.

To Filter the List of Users by Status:

1. Click the **View by Status** drop-down list.
2. Select a status from the menu: Active/Accepted Terms, Expired, Invited, Revoked, or Verified.

To View/Print User Management Reports:

1. Click the **View Reports** button.



- The Specialties/Programs Assignments report is only available at the institutional level and will not display for Program Super Users, Alternate Program Super Users, or Program Coordinator 1s.
2. Select a report.
 3. Choose whether to open or save the report.

A1	:	X	✓	f _x	PROGRAM				
	A	B	C	D	E	F	G	H	I
1	PROGRAM								
2	Program Name	Specialty Name	Name	Role Name	E-mail	Role Assigned	Activated	Date	
3	Mount Sinai	Internal Medicine	chellauv, S	PROGRAM	schellape	S chellauv	8/9/2012		
4	Mount Sinai	Internal Medicine	chellauv, S	Reviewer	schellape	S Ch	#####		
5	Mount Sinai	Internal Medicine	chellauv, S	Reviewer	schellape	S Ch	#####		
6	Mount Sinai	Internal Medicine	existed, I	Interview	plowman, B	I existed	#####		
7	Mount Sinai	Internal Medicine	Hickler, B	Interview	ataamnnb	M Morgan			
8	Mount Sinai	Internal Medicine	Kapoor, S	PROGRAM	skapoor@	M Morgan	#####		
9	Mount Sinai	Internal Medicine	Krafcik, N	Interview	ajaadjtn@	M Morgan			
10	Mount Sinai	Internal Medicine	Rights, B	ALTERNAT	plowman, B	B Rights	#####		
11	Mount Sinai	Internal Medicine	Santosbal	PROGRAM	apaakzqx	K Santosbalibrea			

To Assign or Revoke a Role for an existing user:

1. Select an existing user from the **Manage Users** page.
2. Click on the plus (+) to expand the user name field.
3. To assign a new role, click the **Assign Role** link.

Note: The roles of a user may be swapped, but users should **not** be assigned more than one role.

Lowman, Patrick	Active	09/04/2015
Email: acaakefi@amask.org	INSTITUTION_SUPER_USER	Revoke
Last Login: 12/01/2015 05:49:54 PM		
Assign Role		

- Select a Predefined role and click **Save** to assign an additional role to the user.

4. To revoke an existing role, click the **Revoke** link.

Lowman, Patrick	Active	09/04/2015
Email: acaakefi@amask.org	INSTITUTION_SUPER_USER	Revoke
Last Login: 12/01/2015 05:49:54 PM		
Assign Role		

Pre-Verified User

Pre-verified users are program directors and primary contacts listed in ERAS Account Maintenance (EAM). This list saves ISUs/AISUs time in order to invite new users. Only an ISU/AISU can invite pre-verified users at the institutional level.

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Pre-Verified Users

Search By Name:

Enter Name

Search

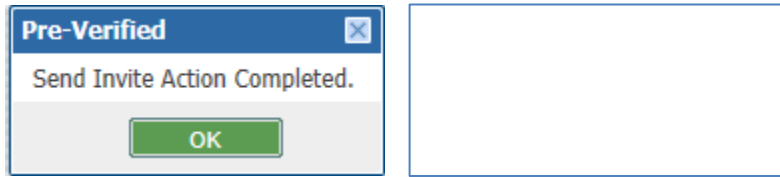
Displaying Results 1 - 25 of 115 | Page 1 of 5 | Display 25 Records per page

<input type="checkbox"/>	Name	E-mail	Specialty	Status
<input type="checkbox"/>	Revonnajco Rukus	aaaaainm@amask.org	Adolescent Medicine (Pediatrics)	New
<input type="checkbox"/>	Shearin Dunnican	aatzamvo@amask.org	Adolescent Medicine (Pediatrics)	New
<input type="checkbox"/>	Hong_Te Masino	ahyaahov@amask.org	Allergy and Immunology	New
<input type="checkbox"/>	Schyler Shanna	aafuaddf@amask.org	Allergy and Immunology	New
<input type="checkbox"/>	Alexander Paes	dmatthews@aamc.org	Anesthesiology	New
<input type="checkbox"/>	Donatella Samwel	aaytaho@amask.org	Cardiovascular Disease (Internal Medicine)	New
<input type="checkbox"/>	Kamdiz Etzalabany	aaanahih@amask.org	Cardiovascular Disease (Internal Medicine)	New
<input type="checkbox"/>	Inderjitjassal Phernsangangam	aaakaosz@amask.org	Child Neurology (Neurology)	New
<input type="checkbox"/>	Torino Vangivarapu	aaakamcz@amask.org	Child Neurology (Neurology)	New
<input type="checkbox"/>	Regev Mosley_Reney	aazhanyx@amask.org	Child and Adolescent Psychiatry (Psychiatry)	New
<input type="checkbox"/>	Sarahirene Mattammal	aallakqe@amask.org	Child and Adolescent Psychiatry (Psychiatry)	New
<input type="checkbox"/>	Harmanjeet Mity	aaawalud@amask.org	Critical Care Medicine (Internal Medicine)	New
<input type="checkbox"/>	Thanjira Krasnokutsky	aaapamjv@amask.org	Critical Care Medicine (Internal Medicine)	New
<input type="checkbox"/>	Shashimohan Jallarina	aaauaobp@amask.org	Dermatology	New
<input type="checkbox"/>	Shashimohan Jallarina	aekmaozg@amask.org	Dermatology	New
<input type="checkbox"/>	Daneeka Trochym	anrsaeje@amask.org	Developmental-Behavioral Pediatrics (Pediatrics)	New
<input type="checkbox"/>	Frecillia Haubert	agefahoj@amask.org	Developmental-Behavioral Pediatrics (Pediatrics)	New
<input type="checkbox"/>	Bhisham Nashelsky	albtaksq@amask.org	Diagnostic Radiology/Nuclear Medicine	New
<input type="checkbox"/>	Miriah Ottsen	aaaqaens@amask.org	Diagnostic Radiology/Nuclear Medicine	New
<input type="checkbox"/>	Test1 Muniyandi	smuniyandi@aamc.org	Emergency Medicine	New
<input type="checkbox"/>	Test2 Rusellian	arusellian@aamc.org	Emergency Medicine	New
<input type="checkbox"/>	Chellamani Barragan	atghaiz@amask.org	Endocrinology, Diabetes, and Metabolism (Internal M...	New
<input type="checkbox"/>	Ekawut Djurdjulov	aaaoankv@amask.org	Endocrinology, Diabetes, and Metabolism (Internal M...	New
<input type="checkbox"/>	Cortlane Goudouros	aaavaevm@amask.org	Gastroenterology (Internal Medicine)	New
<input type="checkbox"/>	Cortlane Goudouros	aaqfaexb@amask.org	Gastroenterology (Internal Medicine)	New

Send Invite

To Invite a Pre-Verified User:

1. Search for or select a pre-verified user.
2. Check the box next to the appropriate name(s).
3. Click the **Send Invite** button.



4. Click the **OK** button.

- This removes the user(s) from the Pre-verified Users screen, and changes their status to Invited in the Manage Users page.
- The pre-verified user receives an email invitation with a link to the PDWS and instructions to:
 - 1) Register for an AAMC account or log in with an existing AAMC account
 - 2) Verify their email account (only if a new AAMC account was created)
- After the user logs into PDWS and accepts the *Terms and Conditions*, he/she will be able to access the system.

My Role

All users have access to **My Role** in the Setup tab, which enables them to see their assigned role(s).

The AAMC/ERAS Hospital for Heath Improvement II > All Groups > Internal Medicine

Q | Help | Bulk Print Requests | History

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Current User Role(s)

(Unit Login Id: aamc2_im)

Role Name	Type	Created By
<div>INSTITUTION_SUPER_USER</div>	Predefined	A.Jambulingam
<div>Interviewer1</div>	Predefined	A.Jambulingam

Rankings

The Rankings Comparison Tool allows Program Super Users, Alternate Program Super Users, and Program Coordinator 1s to select criteria to use when comparing and ranking applicants. The Comparison Tool, by default, displays Applicant Name, Photograph, Rank, Ranking Comments, and Composite Score. Users may remove and add criteria items, up to seven items total. Applicant Name, Photograph, and Rank always display and cannot be removed, and do not count towards the seven-item limit.

The Ranking Comparison Tool will allow you to select criteria you wish to consider when comparing applicants during the ranking process. Select up to seven items, which can include both system-defined and custom scores, to display in the Comparison Tool. Hold down the Ctrl key (or Command key on a MAC) to select multiple, non-contiguous items. Hold down the Shift key and select the first and last values, contiguous items.

The AAMC/ERAS Hospital for Health Improvement II > All Groups > Internal Medicine

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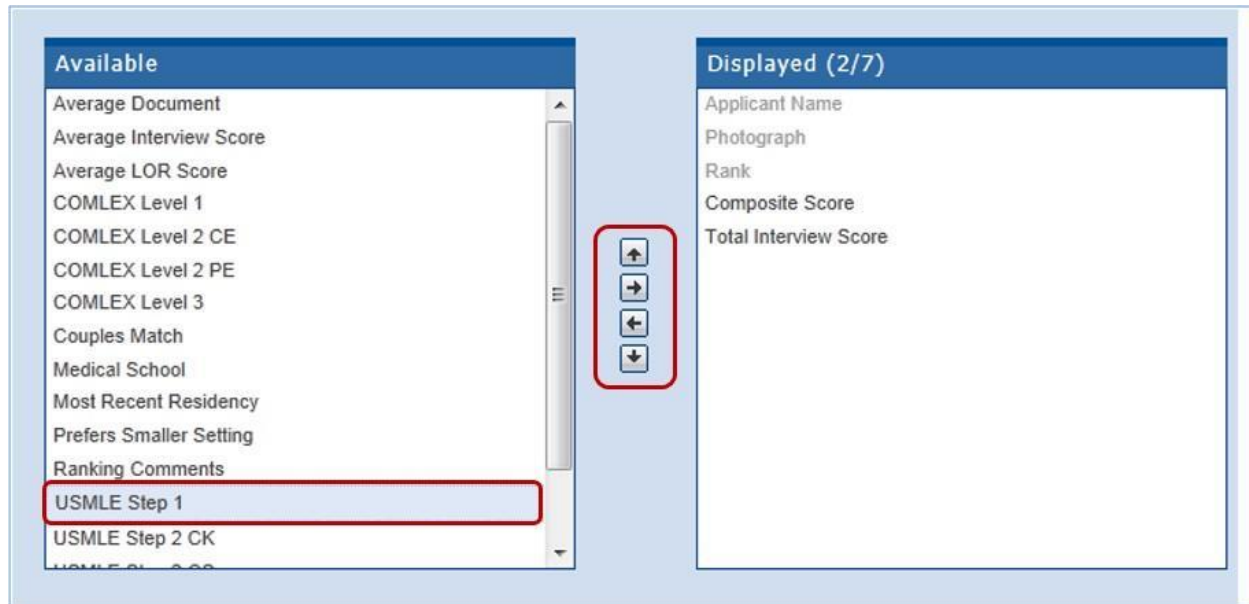
Comparison Tool




The Ranking Comparison Tool will allow you to select criteria you wish to consider when comparing applicants during the ranking process. Select up to 7 items, which can include both system defined and custom fields, to display in the Comparison Tool. Hold the Ctrl key (Command key for Mac users) to select multiple items.

Available		Displayed (2/7)
Average Document		Applicant Name
Average Interview Score		Photograph
Average LOR Score		Rank
COMLEX-USA Level 1		Composite Score
COMLEX-USA Level 2 CE		Ranking Comments
COMLEX-USA Level 2 PE		
COMLEX-USA Level 3		
Couples Match		
LoR		
Medical School		
Most Recent Residency		
Professionalism		
Total Interview Score		
USMLE Step 1		

To Set Up Ranking Items to Display:

1. Select **Comparison Tool** from the Rankings submenu.
2. Select up to seven items from the **Available** column that you want to be included in the Rankings Comparison Tool.
3. Click the right arrow  to move the item to the **Displayed** column.



- Use the up  and down  arrows to change the order in which the criteria will display when comparing applicants for ranking.
- Use the left arrow  to move an item from the Displayed column back to the Available column.
- The items listed in the Displayed column will appear in the Rankings tab, with the Compare light box.

Setup History

The Setup History light box logs changes that were made to the following setup areas:

- Status
- Scores
- Attributes
- Roles
- Scheduler Tool
- Interviewer Tool
- Data Filter
- Manage Groups (institutional super users)

The log tracks the name of the user who made the change, what the change was, and when the change occurred.

Printing

The Bulk Print Requests link is located on each tab next to the search bar.



This link opens the Print Requests light box and displays the following information:

- Print Job Name
- Files
- User Name
- Requested Date
- Status

If necessary, click the Refresh button to update the list.

Documents that have been sent to the printer can be retrieved and printed or saved by clicking on the **Files** link of the print job. Print requests will be available for 48 hours.

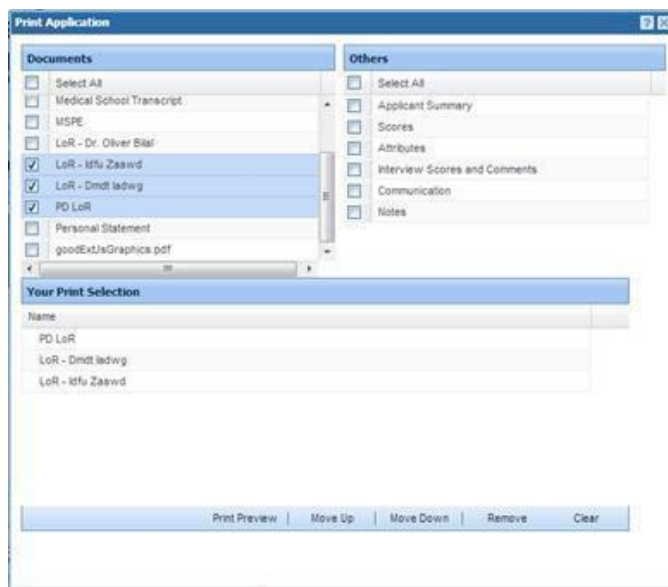
Print Requests				
Print Job Name	Files	User Name	Requested Date ▼	Status
Summaries 6.11...	Summaries 6.11.2013	Marcella Pintura	06/11/2013 03:55 pm	COMPLETE
Applicant Summ...	Applicant Summary 6-4-13	Marcella Pintura	06/04/2013 10:51 am	COMPLETE
Export	Export	Marcella Pintura	03/20/2013 11:51 am	COMPLETE
	null	Marcella Pintura	03/20/2013 11:51 am	COMPLETE
Apps	Apps	Marcella Pintura	03/14/2013 02:51 pm	COMPLETE
Multiple App Test	Multiple App Test	Marcella Pintura	03/14/2013 02:50 pm	COMPLETE
Test Interview F...	Test Interview Form	Marcella Pintura	03/11/2013 10:30 am	COMPLETE
Test Interview F...	Test Interview Form	Marcella Pintura	03/11/2013 10:30 am	COMPLETE
test	test	Marcella Pintura	02/13/2013 03:30 pm	COMPLETE

Print Application(s)

The Print link, located from the Applications tab when viewing an application, opens the Print Application light box. This light box contains criteria that can be selected for printing.

To Print an Application:

1. Click the **Print** link.
2. Select the **Documents** and other information that you want to be printed.
 - There is an option to print an Applicant Summary, which will print the applicant’s information, scores, and attributes.
 - You can re-order the order in which selected documents and other information will print by selecting items to be moved and clicking **Move Up** or **Move Down** under Your Print Selection.
 - The system will retain user preferences for additional print requests.



3. Click the **Print Preview** button.
4. Print or save the document from the Print Preview window.

Light Boxes

This section displays a list of what each of the light boxes in the PDWS contain.

Select Communication Type

Communication records are used to document any contact with the applicant. Select a communication type: Email, Phone, Fax, and Other.

e-mail	An electronic message
Phone	Phone conversation
Fax	Faxed document
Other	Any other form of communication

Add Phone Communication

Enter the appropriate information for a phone communication. Click the Add button when finished.

From	The From field is automatically populated based on the current user name.
To	The To field may be prepopulated, or names may be entered manually.
Subject	The Subject indicates the purpose of the communication.
Date	The Date of the phone communication. This date can be typed or selected from the date picker.
Time	The Time indicates the time of day the communication occurred. Time is chosen from the drop-down menu or typed directly in the field.
Conversation Details	The conversation details can be a maximum of 8000 characters.

Add email Communication

Enter the appropriate information for an e-mail communication. Click the Add button when finished.

From	The From field is automatically populated based on the current user name.
To	The To field may be prepopulated, or names may be entered manually.
Subject	The Subject indicates the purpose of the communication.
Date	The Date of the email communication. This date can be typed or selected from the date picker.
Time	The Time indicates the time of day the communication occurred. Time is chosen from the drop-down menu or typed directly in the field.
Message	The message body can be a maximum of 8000 characters.
Upload	Only one file can be attached to a communication record and the file type must be .pdf or .jpg of no more than 5MB.
Should this attachment appear in Local Documents?	Select whether the attachment should appear in Local Documents area of the Documents panel.

Add Fax Communication

Enter the appropriate information for a fax communication. Click the Add button when finished.

From	The From field is automatically populated based on the current user name.
To	The To field may be prepopulated, or names may be entered manually.
Subject	The Subject indicates the purpose of the communication.
Date	The Date of the phone communication. This date can be typed or selected from the date picker.
Time	The Time indicates the time of day the communication occurred. Time is chosen from the drop-down menu or typed directly in the field.
Comments	The comments can be a maximum of 8000 characters.
Upload	Only one file can be attached to a communication record and the file type must be .pdf or .jpg of no more than 5MB.
Should this attachment appear in Local Documents?	Select whether the attachment should appear in Local Documents area of the Documents panel.

Add Other Communication

Enter the appropriate information for the communication. Click the Add button when finished.

From	The From field is automatically populated based on the current user name.
To	The To field may be prepopulated, or names may be entered manually.
Subject	The Subject indicates the purpose of the communication.
Date	The Date of the communication. This date can be typed or selected from the date picker.
Time	The Time indicates the time of day the communication occurred. Time is chosen from the drop-down menu or typed directly in the field.
Comments	The comments can be a maximum of 8000 characters.
Upload	Only one file can be attached to a communication record and the file type must be .pdf or .jpg of no more than 5MB.
Should this attachment appear in Local Documents?	Select whether the attachment should appear in Local Documents area of the Documents panel.

Save New Filter

Enter a filter name, select a sort option, and enter a description.

Name of the filter	The name must be unique and between 1 and 25 characters.
Sorted By	The default option is by last name.
Description of the filter	The description must be between 1 and 50 characters.

Update Status

Update the Application, Interview, Ranking, and/or Custom status of the selected applicant(s). Click the Apply button to save changes.

- The No Change option incurs no changes.
- The Check option will check the box for the desired status.
- The Uncheck option will uncheck the box for the desired status.

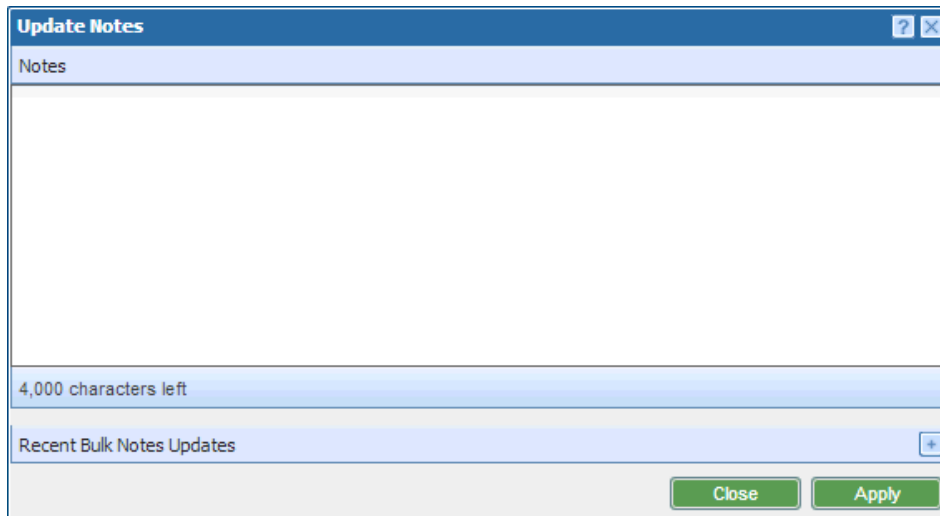
Update Attributes

Update a specific attribute for the selected applicant(s) to a specific value. Click the Apply button to save changes.

- The No Change option incurs no changes.
- The Check option will check the box for the desired status.
- The Uncheck option will uncheck the box for the desired status.

Update Notes

Add a note for the selected applicant(s); maximum of 4000 characters. Click the Apply button to save the note. Users can comment on other user’s notes.



The screenshot shows a software window titled "Update Notes". It features a large text input area for notes, with a status bar at the bottom of the input area indicating "4,000 characters left". Below the input area is a section titled "Recent Bulk Notes Updates" with a small plus icon. At the bottom right of the window are two buttons: "Close" and "Apply".

View/Print Reports

Click a report name to view/print one of the reports for the selected applicant(s).

View/Print Application

Select the information to view or print for the selected applicant(s). Click the Request Print button when finished.

- Choose which, if any, applicant documents to view or print.
- Include a date range to view or print documents that were received or updated within the specified dates.
- Choose any other additional information to view or print.
- Select whether to print each application to its own separate PDF, or print each application to one cumulative PDF.
- Create a Print Job Name.

Compose

Enter the appropriate information and click the **Send** button when finished.

- Depending on where the Compose feature is accessed, it may be automatically populated with the applicant(s) or interviewer(s) address(es). If Compose is selected from the Program Messages tab, recipients are manually entered and will be messaged with BCC functionality.
- Additional recipients can be entered manually.
- The **From** field is automatically populated with the Program Name.
- The **Subject** and **Message** text boxes must be entered to send a message.
- Special formatting (bold, underline, italics) as well as spell check with a medical dictionary is available.
- Use the **Template** option to select a pre-defined template message.
- Use the **Attach a File** link to include a document with the message. The attached file must be in PDF format no larger than 5 MB.
- Click the **Send** button to send the message to recipients.

- Use the **Save As Draft** button to save the message to the draft folder and send at a later time.
- Use the **Save As Template** button to save the message as a template for future use. The Subject line is the template name.
- Use the **Discard** button to exit without saving or sending the message.
- Use the **Clear** button to clear data from all of the text boxes, except for the From field.

Compare

Compare and view comparison items side-by-side for up to three applicants. Drag and drop applicants into ranking order.

View/Print Reports

Click a report name to view/print a report.

Compare/Swap Applicants

Compare and view comparison items side-by-side for up to three applicants. Assign a specific rank to an applicant or drag to a new location to swap the applicants’ rank order.

Select File Format

The CSV option refers to Comma Separated Value. This format is commonly opened in a spreadsheet application such as Microsoft Excel. The TXT option is a text file, which is commonly opened in Notepad or Microsoft Word.

Create New Attribute

Select one of the following attribute types. Once a new attribute is defined, it is viewable from the Attributes tab in the Evaluate Application panel.

- Checkbox (Checked or Unchecked)

- Textbox (free alpha or numeric text)
- Date (entered via pop-up calendar)
- Drop-down list (Can include up to 10 values)

Below are examples of attributes:

- Urban Experience – a checkbox that tracks whether or not an applicant has experience in an urban setting.
- Research Experience – a text field that tracks an applicant’s specialty interest (e.g. Cardiology, Infectious Diseases, etc).
- Resident Shadowing date – a calendar date that tracks when an applicant will shadow a current resident.
- Hotel List for interviewees – a drop-down list that tracks which hotel each applicant will be staying in.

Add Local Document

A local document is any document not included in the MyERAS application, but may be required by the program. For example, programs interested in research may ask applicants who have published peer-reviewed articles to provide a copy of the article before or during an interview.

To Add a Local Document:

1. Click the icon to select a file to import.
2. Locate and select a file from the **Choose File to Upload** window.
 - Only JPG and PDF file types are supported.
 - File cannot be greater than 5MB in size.
3. Click the **Open** button or double-click the file.
4. If desired, change the **Display Name** for the file.
5. Click the **Upload** button.

Contact ERAS

The ERAS HelpDesk is available to assist programs with questions about the Program Director’s Workstation (PDWS). The ERAS HelpDesk can be reached by using the following information:

- [Send us a Message](#)
- (202) 828 - 0413
Monday-Friday
8 a.m. - 6 p.m. ET
- <https://www.aamc.org/erasprograms>