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AAMC

Electronic Residency Application Service®

2024

ERAS® Program Director's Workstation (PDWS) USER GUIDE

www.aamc.org/eras

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

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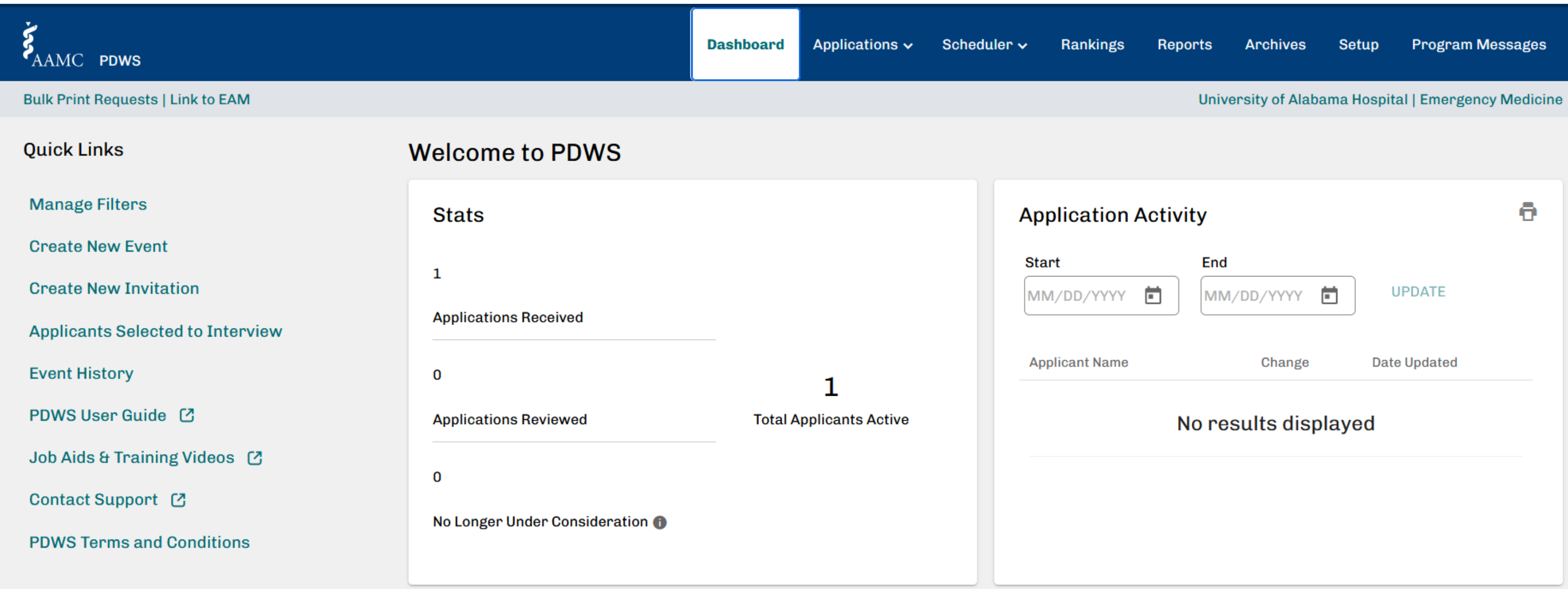
Welcome

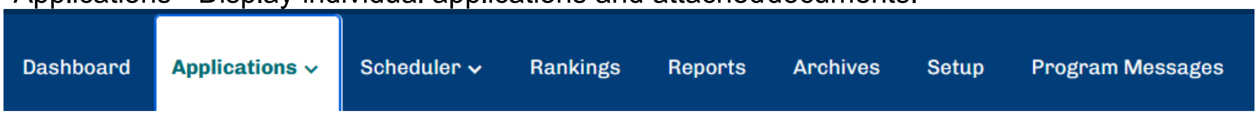
Welcome to the Program Director's Workstation (PDWS) User Guide. The PDWS is used by programs to evaluate residency and fellowship applications. This is done by reviewing application materials, managing interviews, sending messages, generating reports, and ranking applicants. A ranked list of applicants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



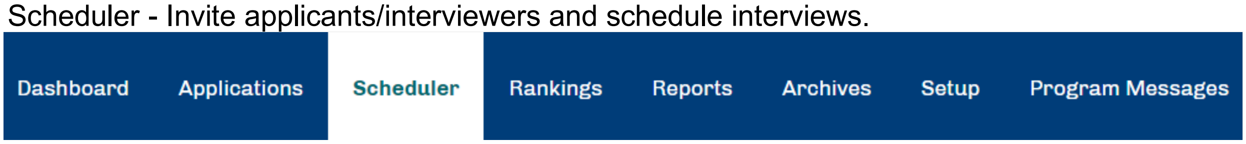
Getting Started with PDWS

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

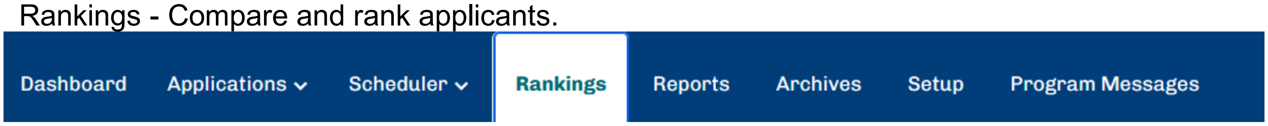
Applications - Display individual applications and attacheddocuments.



Scheduler - Invite applicants/interviewers and schedule interviews.

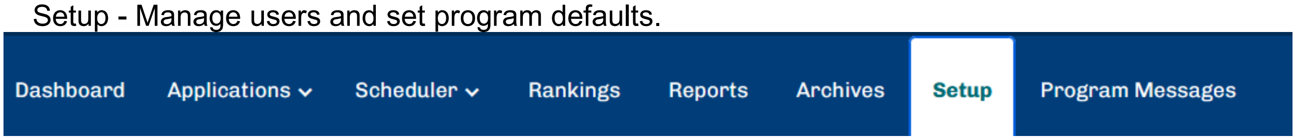


Rankings - Compare and rank applicants.



Reports - Generate and view reports.

Setup - Manage users and set program defaults.

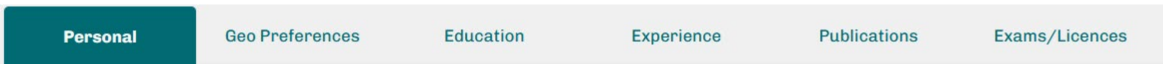


Program Messages - Display sent and received messages.

Understanding the User Interface Terminology

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

Tabs



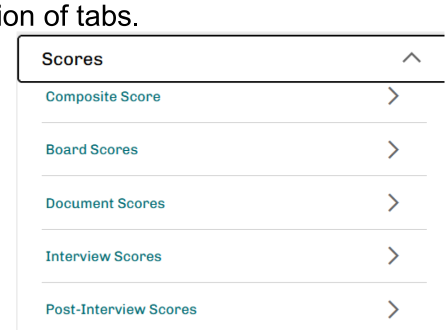
A standard Windows control that provides navigation between different screens or sections of information.

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, moveable, pop-up window that allows users to perform a command, asks users a question, or provides users with information or progressfeedback.

Table

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

Drawers

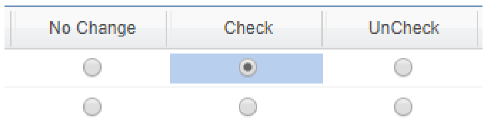
Additional fields or functions revealed (or hidden) using a toggle inside a panel.

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

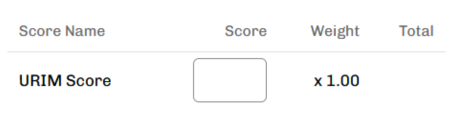
An input selection that can be used to select more than one option from a list of choices.

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.

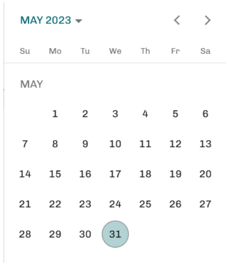
Icon

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



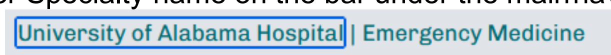
An icon that opens an interactive calendar in a small overlay used to select a date.

Choose Level (Toggle)

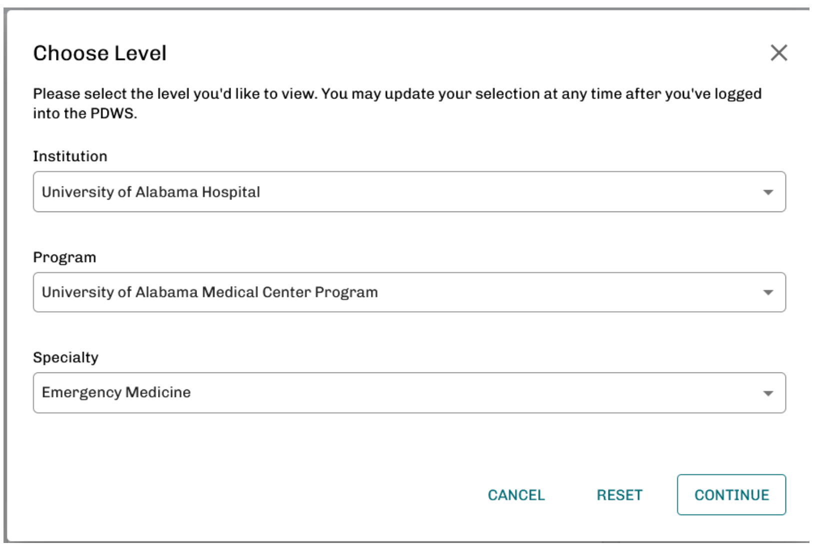
The Choose Level feature allows users to view data for a specific program within their institution. Institution Super Users are also able to view data at the institution level. After logging in to the PDWS, select the institution under the Dashboard to view the Choose Level dialog box. Users will automatically be prompted to choose a level when logging in for the first time. Narrow down the data to the specific institution or program by selecting an Institution, Program, and Specialty from their drop-down menu.

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.



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 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 applicants to interview for each position.
- Use the **Manage Filter** tools to identify 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 with associated level permissions that can be assigned to program users and others. Each role 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 main categories of user 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 setup.

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 SuperUser

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 Coordinator 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** are limited 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: Program Super Users and Program Coordinator 1 users 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 LimitedAccess

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 theirnote
- Add document scores and custom scores (if they exist)

- View and print reports from *Current Results* for one or more applicants

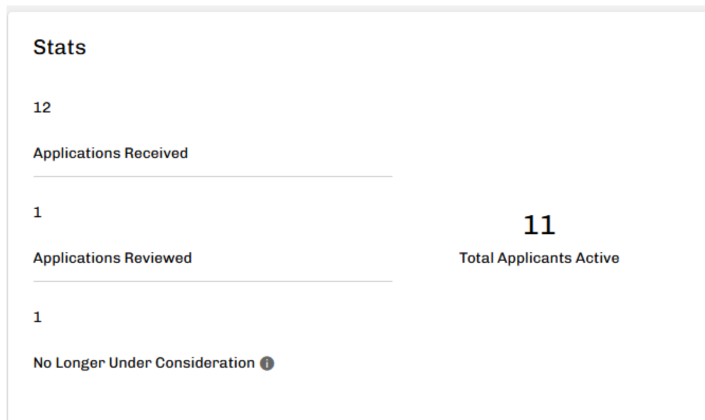
Dashboard

After logging into the system, each user lands on their dashboard. The dashboard provides an overview of application activity and important ERAS or PDWS notifications. 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.

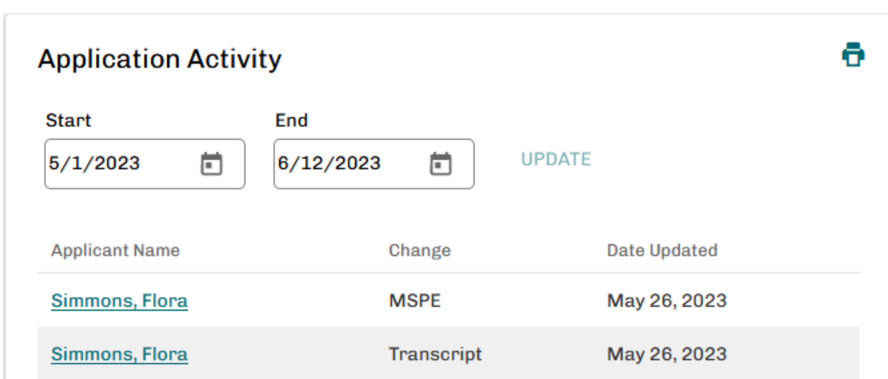
Stats Panel

The Stats panel shows statistics for Applications Received, Applications Reviewed, No Longer Under Consideration, and Total Applicants Active.



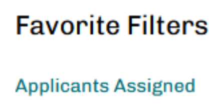
Application Activity Panel

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



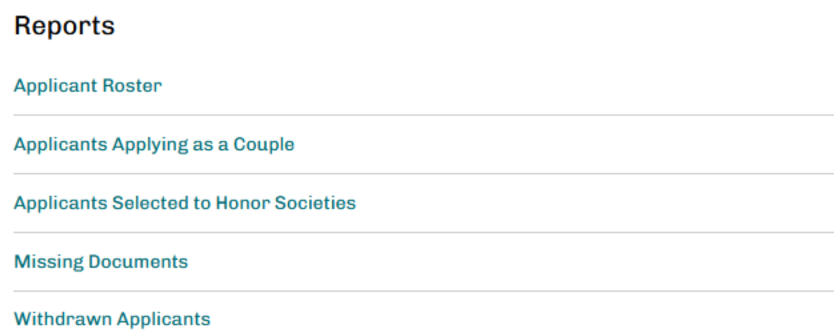
Favorite Filters Panel

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.



Reports Panel

The Reports panel displays a list of reports chosen to display from Setup.



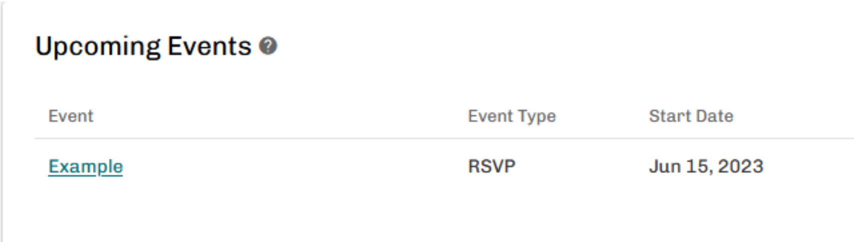
Interview Progress Panel

The Interview Progress panel allows users to easily navigate the following reports:

- Selected to Interview.
- Invited to Interview.
- Waitlisted.
- Scheduled.
- Interviewed.
- Declined.

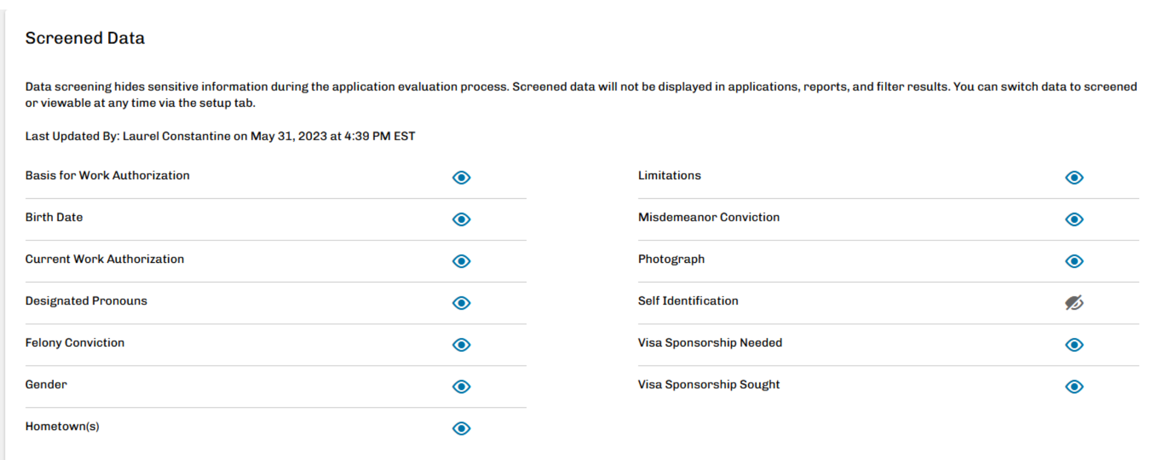
Upcoming Events Panel

This section will display up to 25 Upcoming Events. If you have more than 25, you will see a "View All" link at the bottom-right corner.



Screened Data 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.



Quick Links

Quick Link Name	Quick Link Navigation Details
Manage Filters	Filters sub-tab under the Applications tab.
Create New Event	Create a new Private or RSVP Event.
Create New Invitation	Create and send a New Invitation to applicants to an event.
Applicants Selected to Interview	Applicants sub-tab under the Scheduler tab.
Event History	Scheduler History sub-tab under the Scheduler tab.
PDWS User Guide	Opens the PDWS User Guide in a new browser tab.
Job Aids & Training Videos	Resource Libraries on the PDWS Communities site.
Contact Support	Contact ERAS Support form and ERAS Support contact information.
PDWS Terms and Conditions	Opens the PDWS Terms and Conditions window.
Thalamus Core	Direct link to Sign in page for Thalamus.

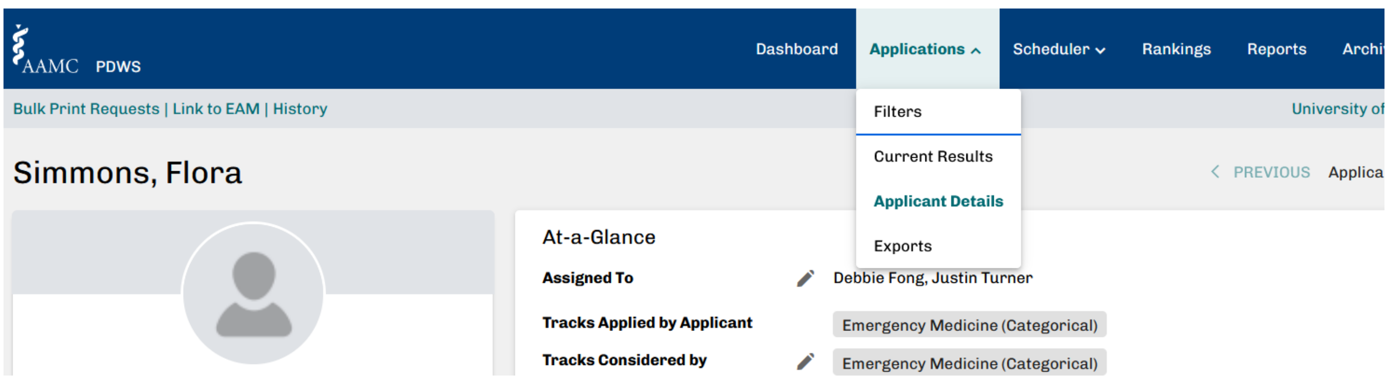
Applications

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 eight tabs: Personal, Geographic Preferences, Education, Experience, Publications, Exams/Licenses, Limiting Factors, and Documents.

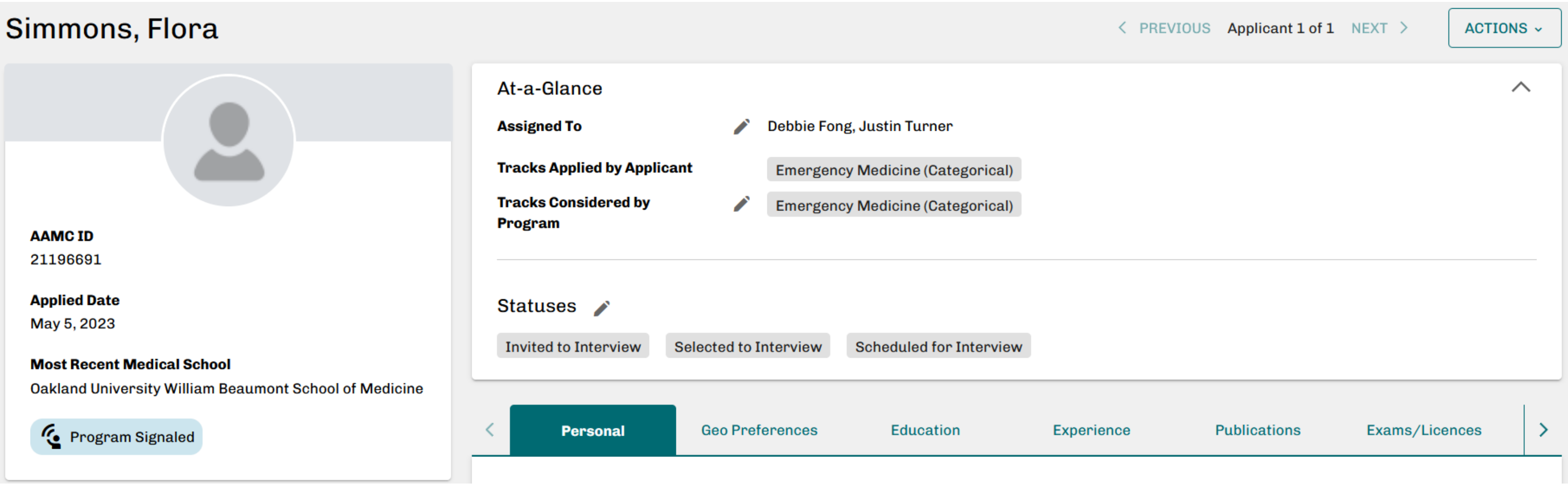
Note: SOAP® participating programs will see additional SOAP® fields along with an orangeindicator next to the applicants who applied to the program during SOAP®. There will also be an additional indicator next to the tracks the applicant applied to duringSOAP®.



Header and At-a-Glance Panel

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

The At-a-Glance panel provides information about Statuses, users assigned to the applicant, tracks considered by the program, and the track(s) applied by the. Program Super Users or Program Coordinator(s) 1 can update tracks by using the edit link next to Tracks considered by Program.



Status Types

Applicant Status

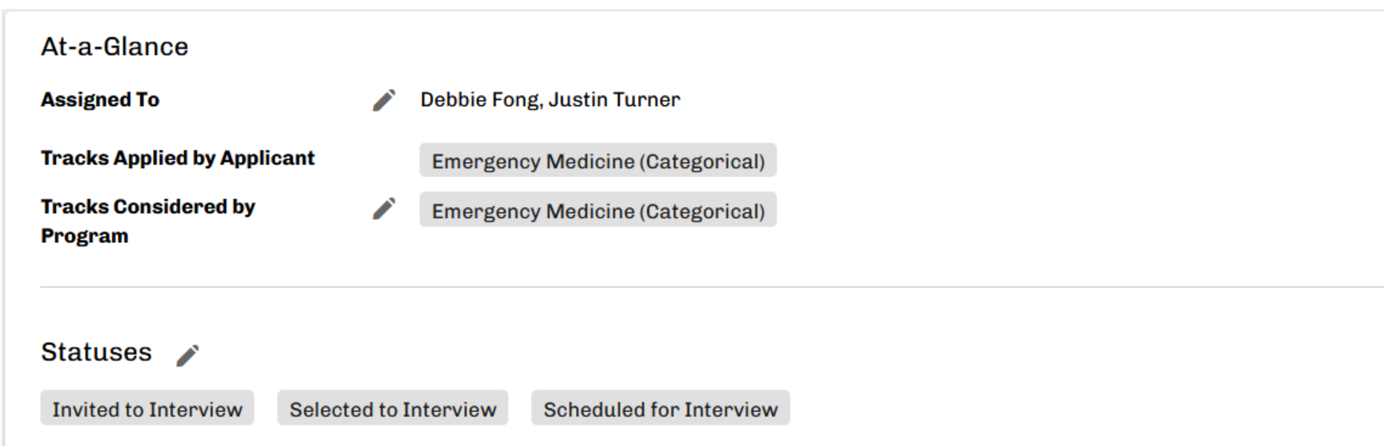
An applicant's location in the selection process is determined by their status. There are four status groupings:

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

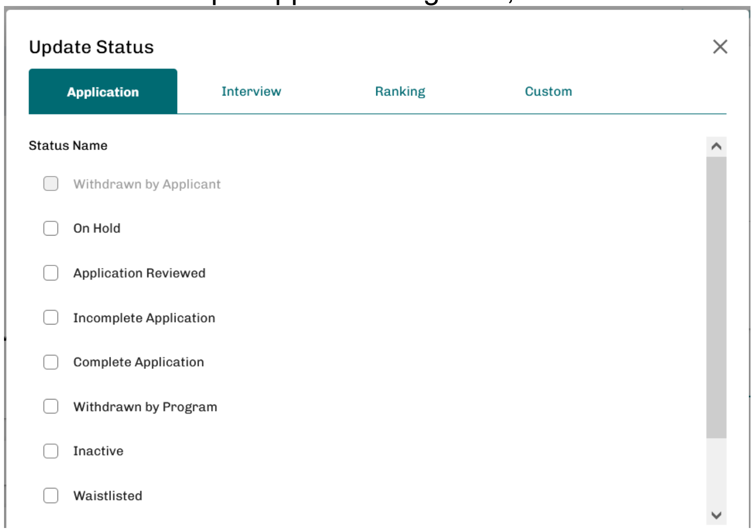
You can create any type of user-defined grouping status from the Setup tab. All statuses are filterable.

To Update a Status for One Applicant:

1. Click the pencil icon next to **Statuses** on the At-a-Glance section.



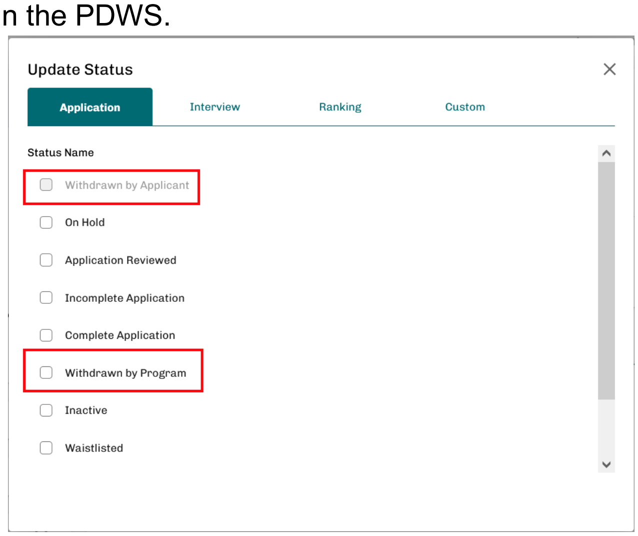
2. Select any of the appropriate statuses that will save the changes with the date and time stamp.
    - To update statuses for multiple applicants together, use Bulk Actions after you run a filter.



Application Status

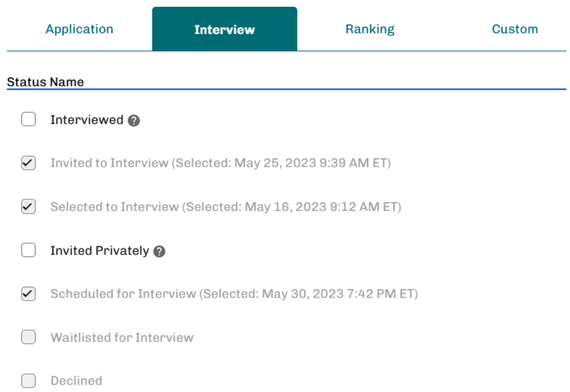
The application status indicates where the current application stands in the overall process. Program Super Users, Alternative Program Super Users, Program Coordinators 1, Reviewer_Interviewer, and Reviewer_Interviewer Limited Access can update all application statuses except for:

- Withdrawn by Program – This action will prompt you to confirm this status change for applicants who have been scheduled and/or ranked.
- Withdrawn by Applicant – this action takes place in the MyERAS® system and is updated in the PDWS.



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, Invited Privately statuses, and Interviewed. Marking an applicant as Selected to Interview will add the applicant into the Scheduler module.



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.

Custom Status

Custom statuses can be created in Setup.

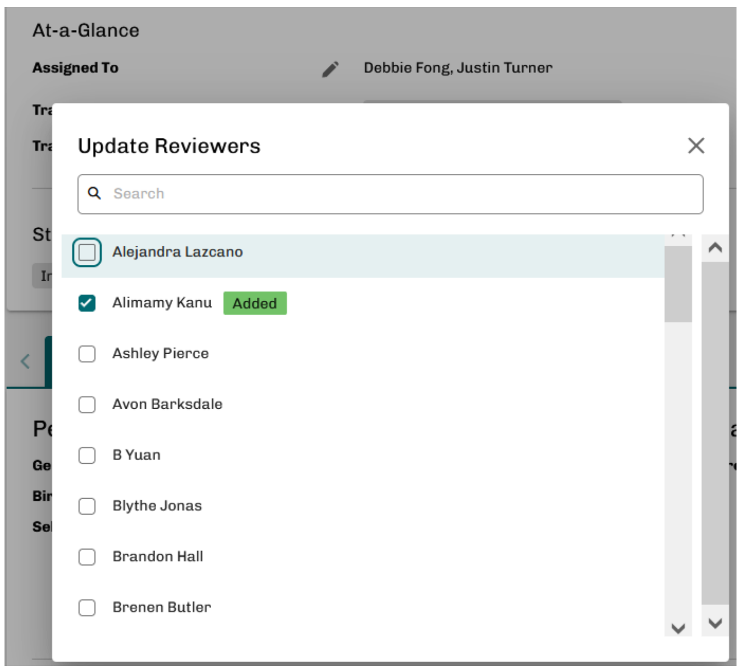
Note: Status values that are triggered by the system cannot be changed, including Withdrawn by Applicant, Ranked, and most Interview statuses.

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 At-a-Glance panel, click the **pencil icon** for the Assigned To row.

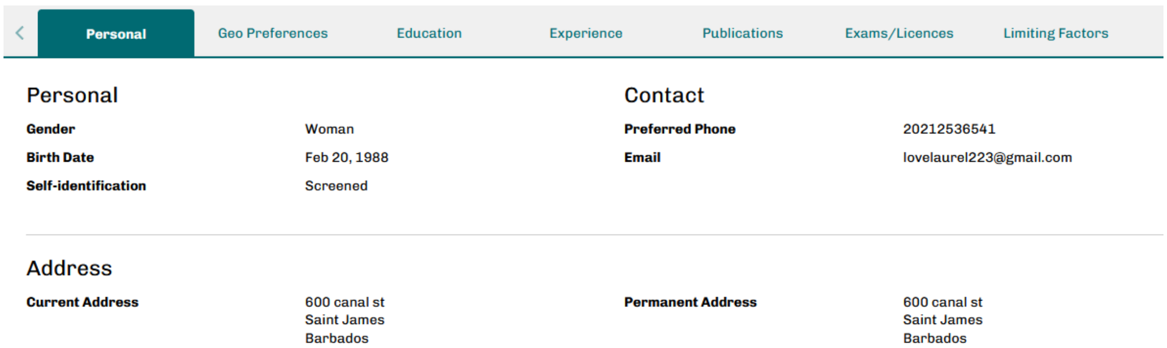


1. Select the user(s) to assign to the applicant.
2. Click the **X** button to save the selections and close the light box.

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

Applicant Tabbed Panel

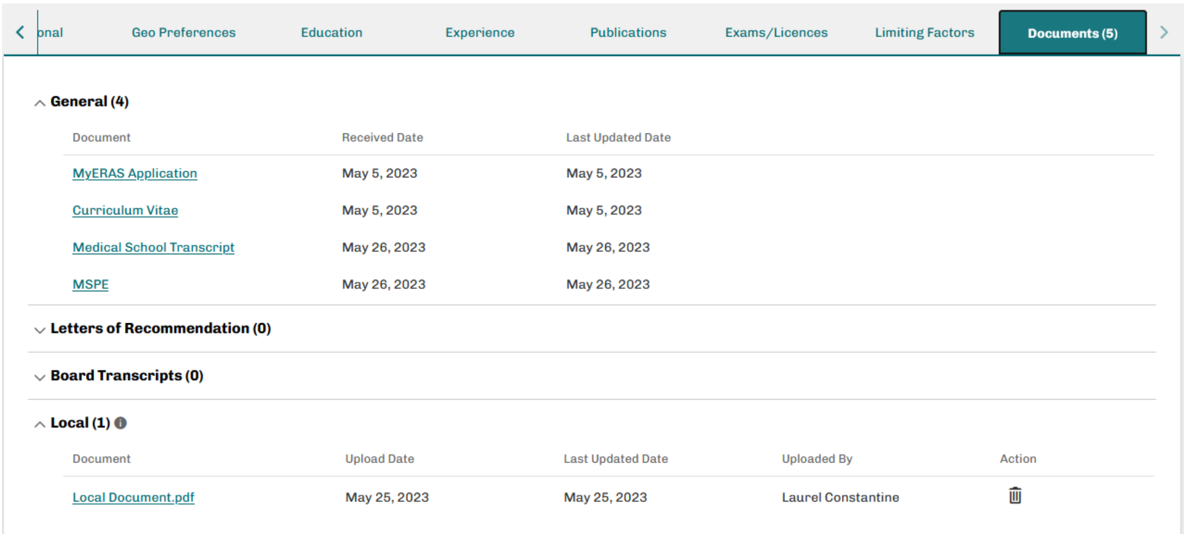
The Applicant tabbed panel is divided into six tabs to help short-list the applicant pool.



Personal	Summary and general information including screened information.
Geo Preferences	Applicant's Division and Setting preference.
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	Applicant's documents and local documents uploaded by the program.

Documents

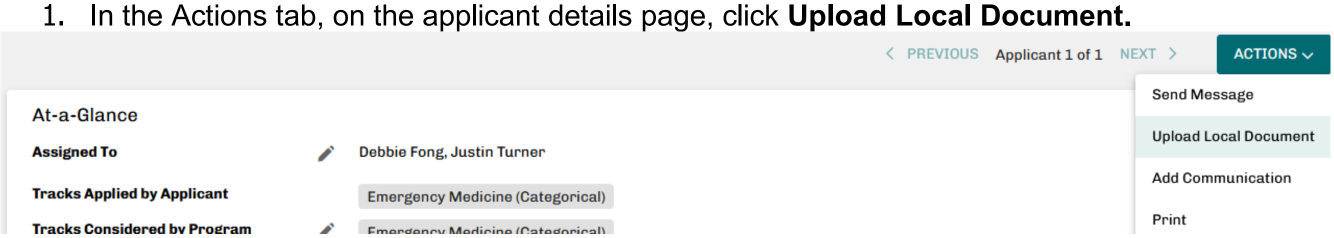
The Documents tab displays documents received from the MyERAS system, the designated dean's office, and national boards. Use the Document panel to upload local documents for a specific applicant.



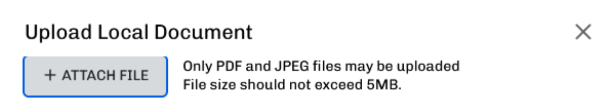
A local document is any document not included in the MyERAS application but may be required by the program. For example, programs interested in research may ask applicants who have published peer-reviewed articles to provide a copy of the article before or during an interview. Keep in mind attached local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

To Add a Local Document:

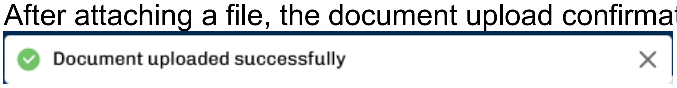
1. In the Actions tab, on the applicant details page, click **Upload Local Document.**



2. Locate and select a file from the Choose File to Upload window.

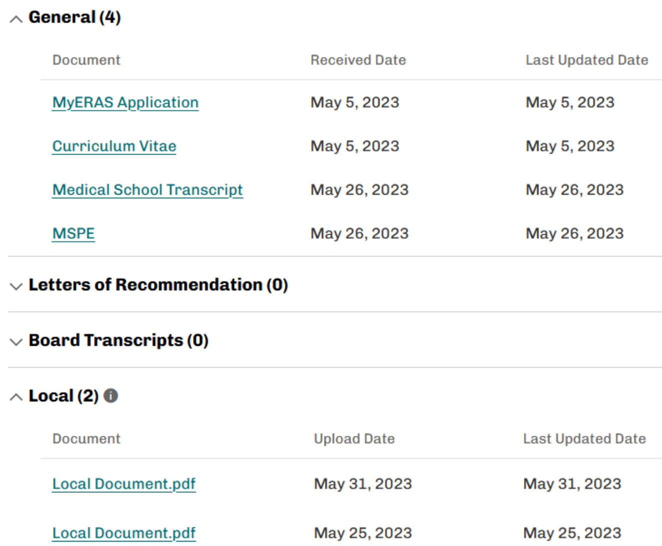


After attaching a file, the document upload confirmation will appear.



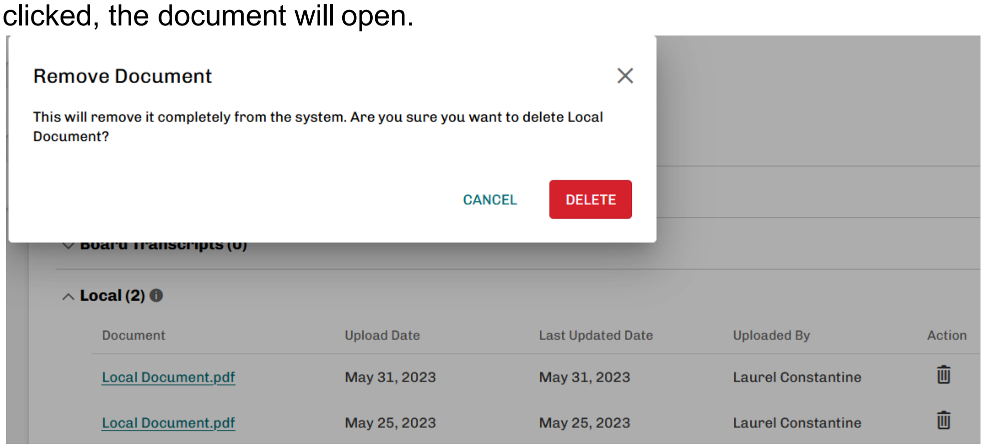
To View a Local Document:

- On the Documents tab, 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 tab, click the trash icon.
   - Click anywhere in the row, but not the document name. If the document name is clicked, the document will open.

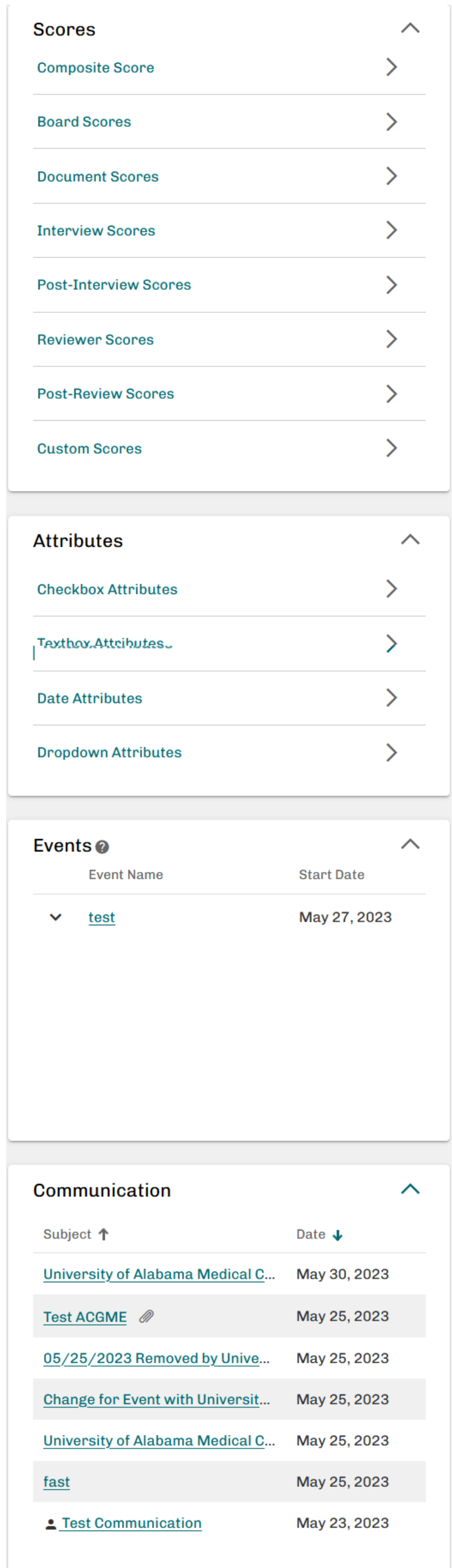


2. Click Delete to confirm.

Evaluate Applicant Panel

This tabbed section holds information about the applicants as they move through the evaluation process. This panel consists of 4 expandable tabs:

- Scores
- Attributes
- Events
- Communication



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 areasto 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 commentbox.
4. Enter comments, up to a maximum of 4,000 characters.
5. Select **Save**.

- 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.

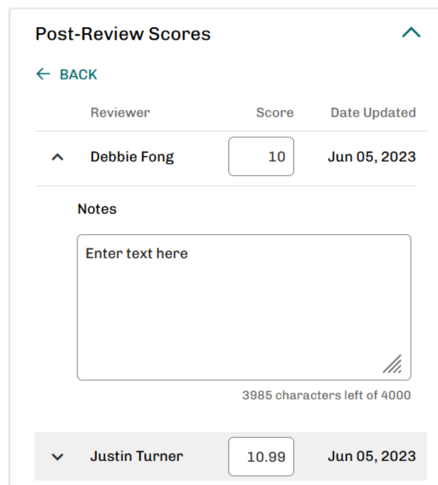
Note: Scores and comments entered by Reviewer_Interviewer users are no longer available for Program Super Users and Program Coordinators once they've been unpublished.

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 the scores/comments.

To Enter Reviewer Notes and Scores:

1. Select the Scores tab.
2. Select Reviewer Scores or Post-Review Scores.
   - PDWS displays the Reviewers based on the assignment information and provides areas to enter score and review notes.
3. Click the box beneath Score to enter a numeric score value.
4. For Post-Review Scores, click the drop-down next to the Interviewer name to open the notes box.
5. Enter notes, up to a maximum of 4,000 characters.
6. Click outside of the box to **Save**.
   - Notes/scores that are Saved are viewable only by the user who entered them (e.g., Reviewer, Program Coordinator).

7. Delete the text from the notes textbox to remove the scores/comments from the total and average Reviewer score.

Communication

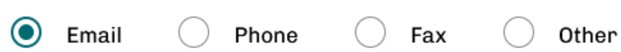
Communication records are used to document any contact with the applicant. There are four types of communication records, and each is associated with an icon: e-mail, Phone, Fax, and Other. Messages sent or received through the PDWS are automatically noted in the Communication tab and cannot be edited.

To Sort the Communication:

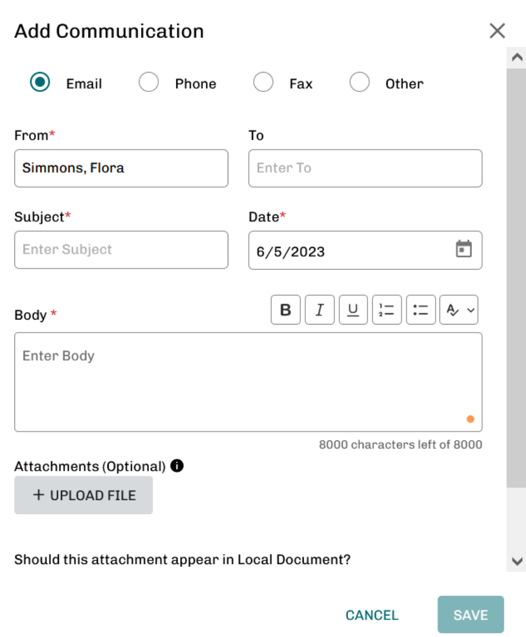
- Click a column heading.

To Add a Communication Record:

1. In the Communication tab. Click **Add** Communication.
2. Select the type of communication.



3. Enter the appropriate information.
4. Click the **Save** button when finished.



To Attach a Document to a Communication Record:

1. While in the Add Communication light box, click Upload File.
    - 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 the Local Documents area of the Documents panel.
5. Click the **Save** button when finished.
    - A paperclip icon indicates the communication has an attachment.
    - Attachments can be viewed and printed.

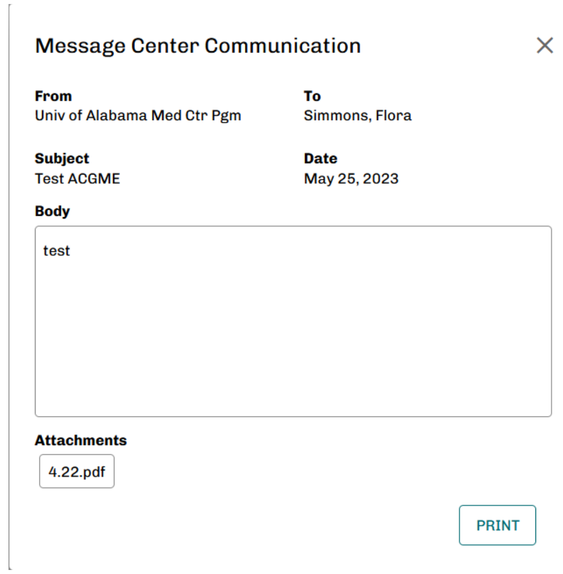
To Edit a Communication Record:

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 **Delete** 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.

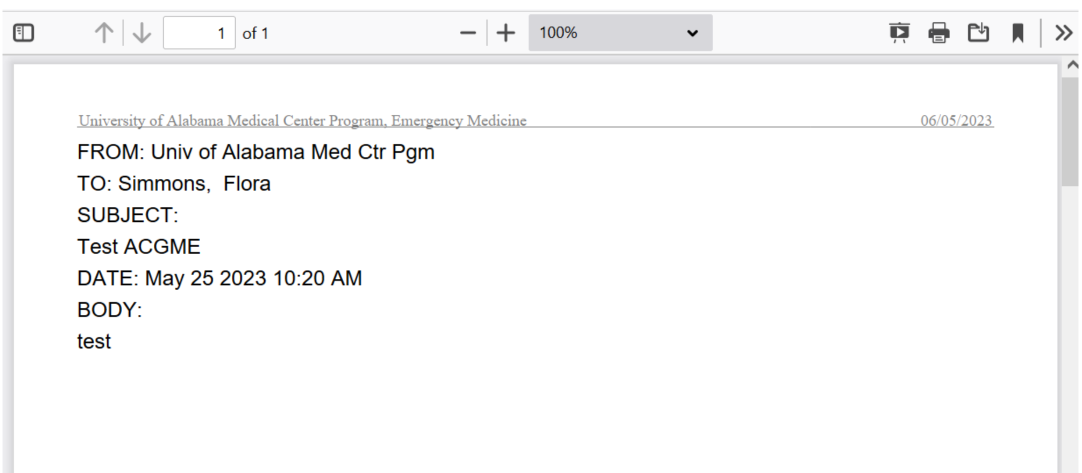
2. Click the **Print** icon at the top right of the light box.

   - 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.

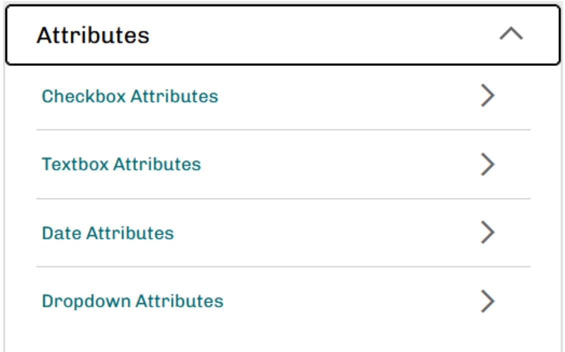
3. Click the **Print** button.

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.



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.

To Update an Attribute:

1. Select the desired Attributes sub 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 4,000 characters.
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 2,000 characters.
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

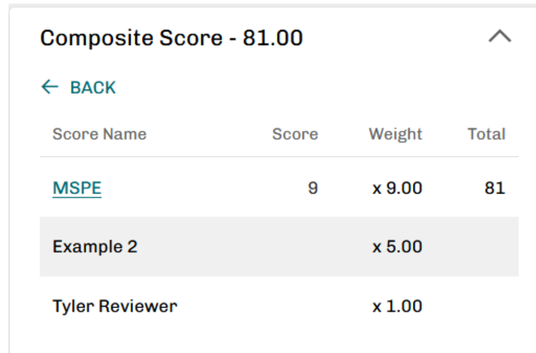
Programs can define and configure Score types on the Setup tab.

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



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

Composite Score

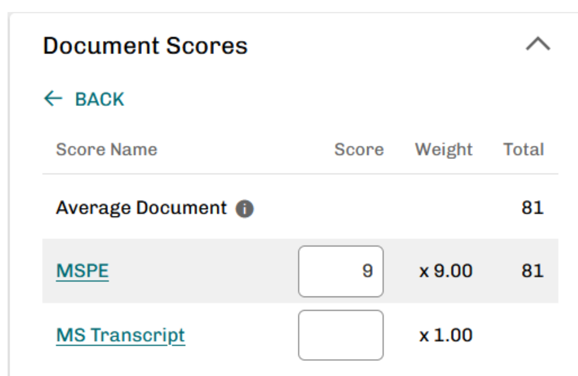
The composite score is the combination of all scores which are selected in Setup. Score weights and which scores to include in the Composite Score are determined in the Setup menu.

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.

Documents Scores

Document scores relate to the documents submitted by the applicant.



- 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.

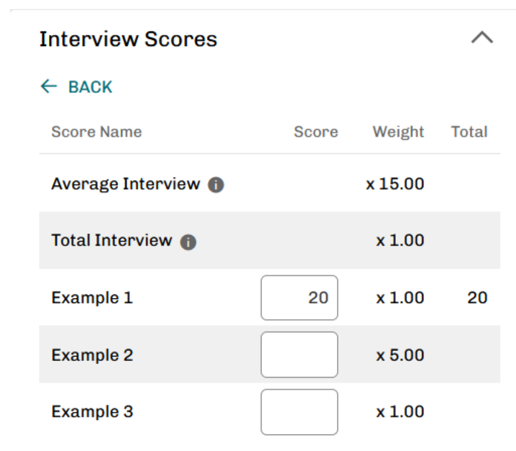
Update Document Scores

Only documents submitted by the applicant's Dean's office or Educational Commission for Foreign Medical Graduates (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 inSetup.

Interview Scores

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

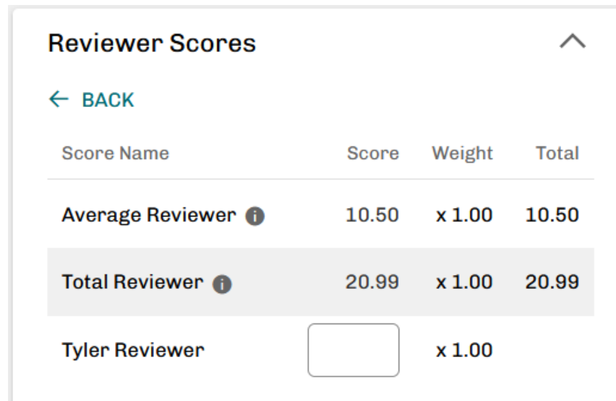
- Average Interview Score (system-generated) – average of interview scores enteredby all the interviewers via the Interview.
- Total Interview Score (system-generated) – total of the interview scores entered by all the interviewers.
- A user-defined score may be added to the Interview Scores in Setup,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



Reviewer Scores

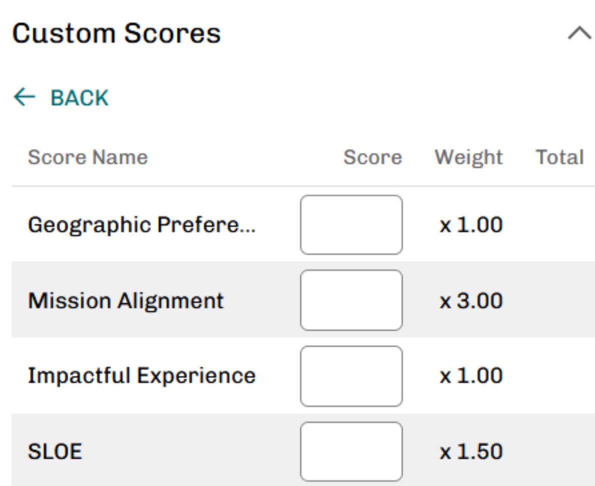
There are two score types displayed on the Reviewer Scorespanel:

- 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, whichcan be included in the average and total Reviewer score.



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.

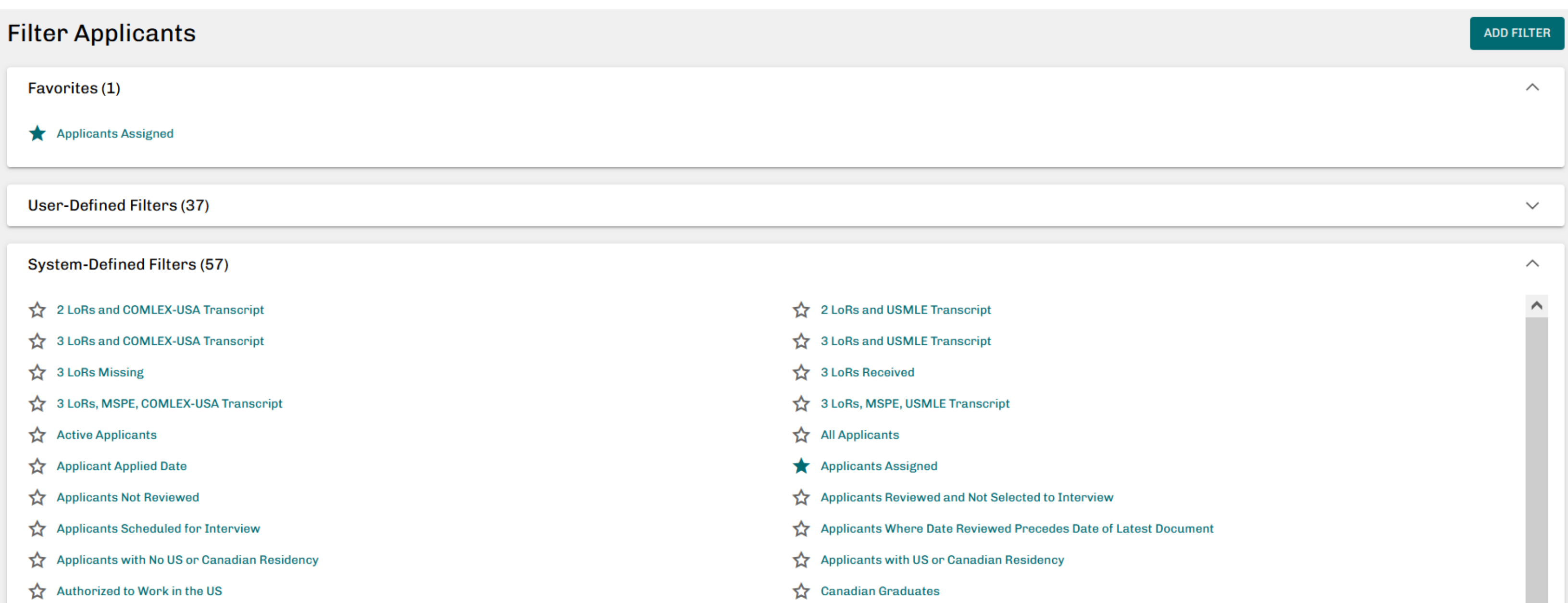


Manage Filters

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.



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.

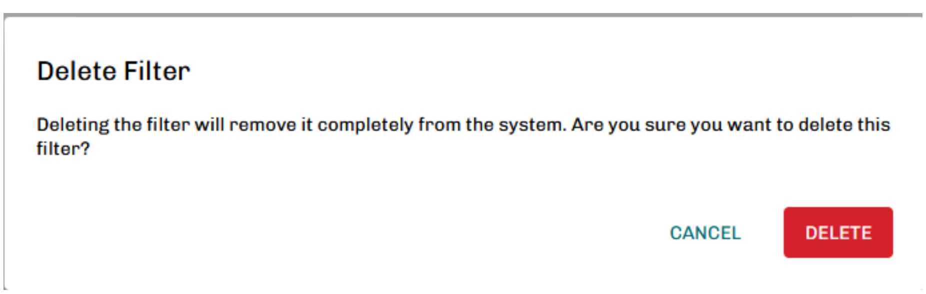
To Run a User-Defined or System-Defined Filter:

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 **Trash** icon.

3. Click the **Delete**.

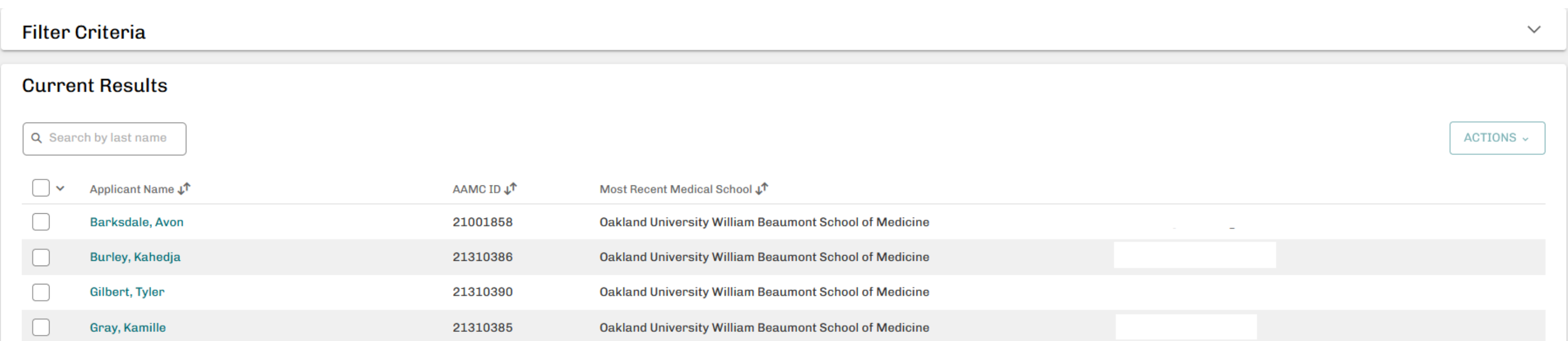


   - System-defined filters cannot be deleted.

View Current Results

The 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 definedcriteria.

The Current Results option does not automatically update even after the page has been refreshed. You will need to re-run any filter or re-run the All Applicants or Active Applicants filter to update the applicant list.



Create User-Defined Filters

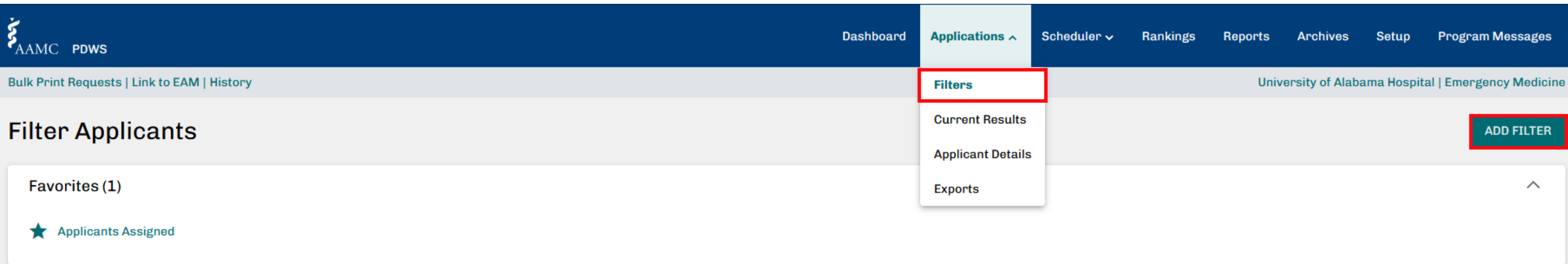
The first task in creating a new filter is planning and deciding the necessary criteria for extracting the correct group of applicants. When creating a filter, choose between the two options to connect different criteria between groups:

- 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.

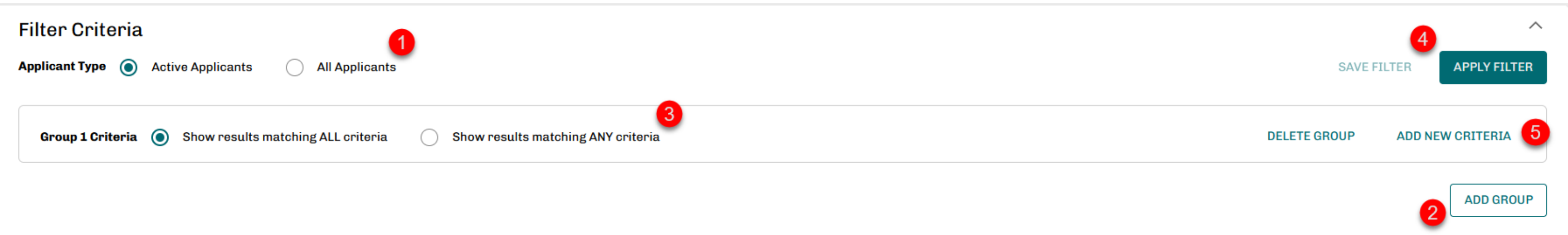
Step 1: Start a New Filter:

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

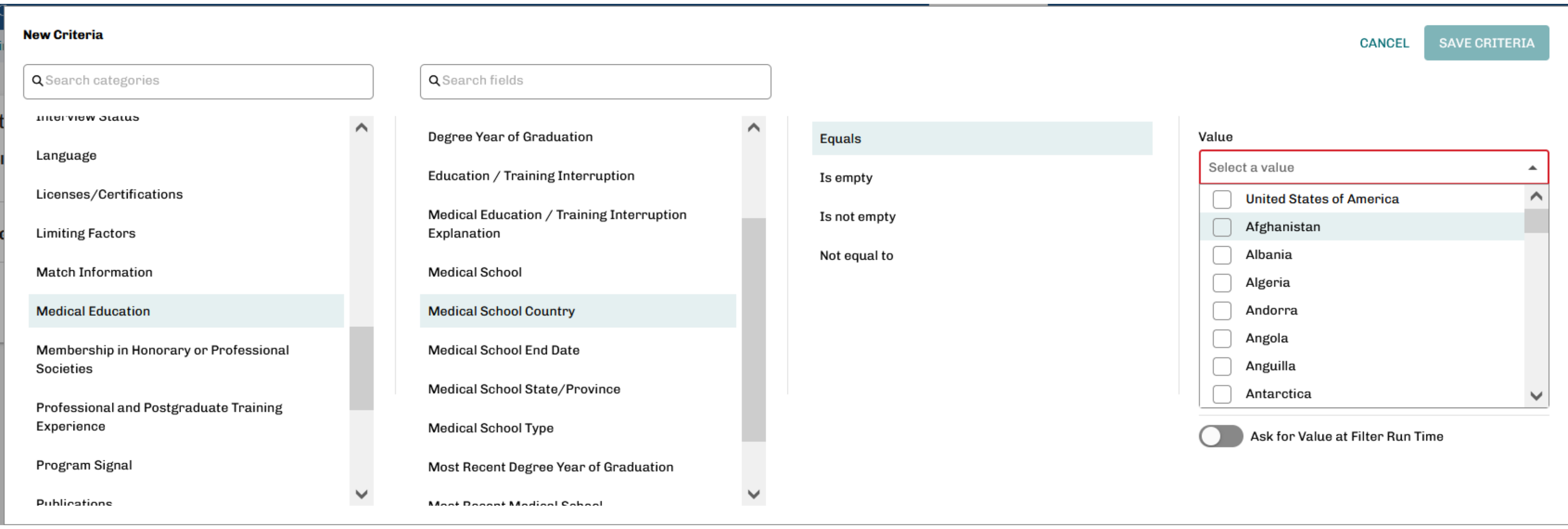


Step 2: Construct the Filter

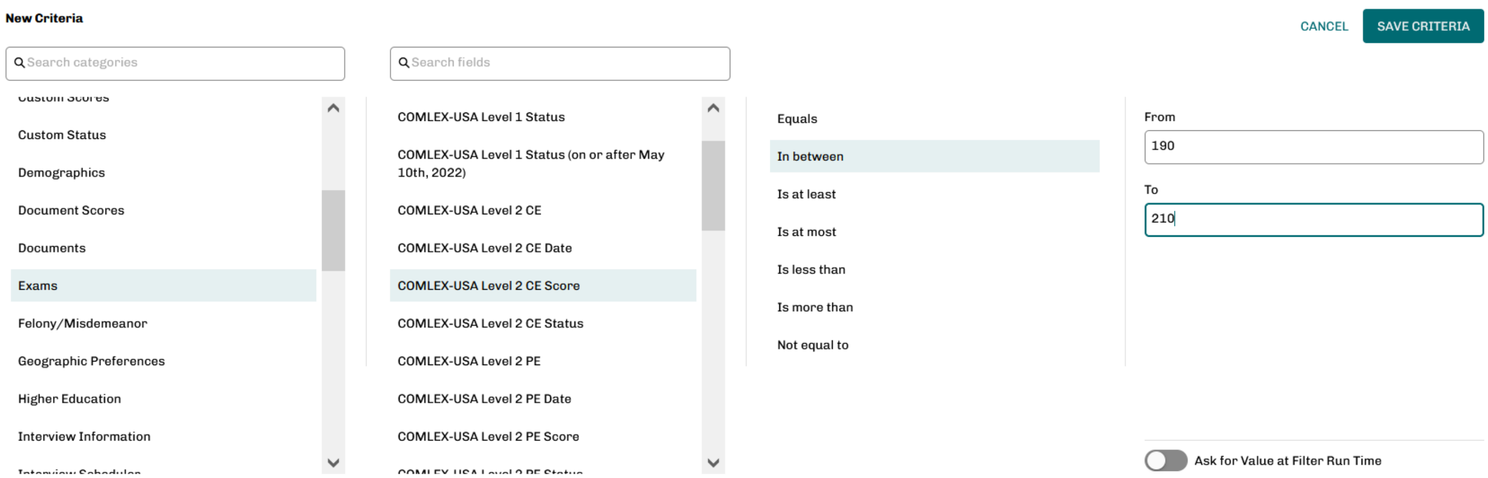
1. Choose to run the filter for All Applicants or Active Applicants.
2. Click the **Add Group** button to add criteria.
3. If necessary, click the delete icons (X) to get rid of any existing criteria.
4. Select the filter relationship of the criteria within the group.
   - ALL – This narrows the results. 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.
5. Click the **Add New Criteria** button.



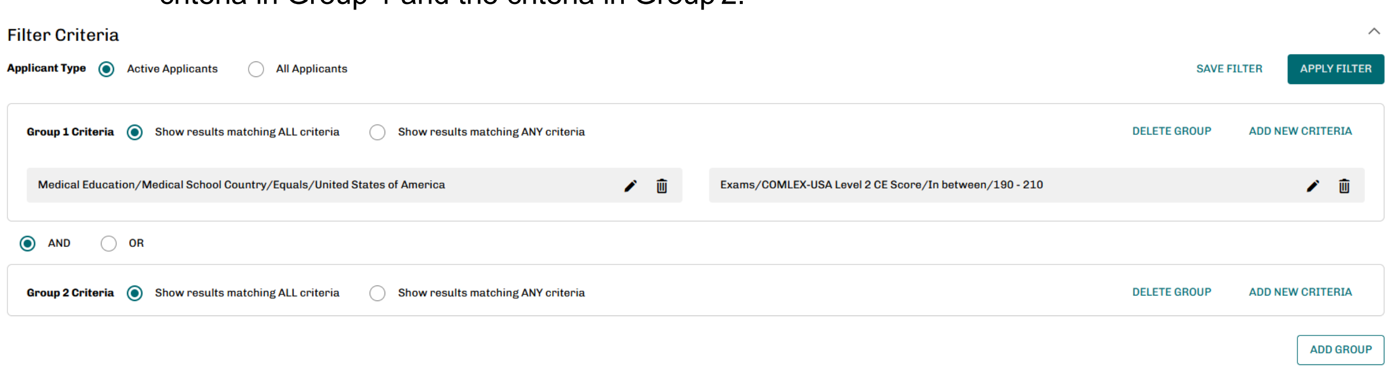
6. Select a **Category**, **Field**, **Condition**, and a **Value** for each criterion.
   - To create a filter that prompts for a value when it is run, mark the **Ask User for value at filter run time** check box.
   - A prompt filter must be saved before it can be run.



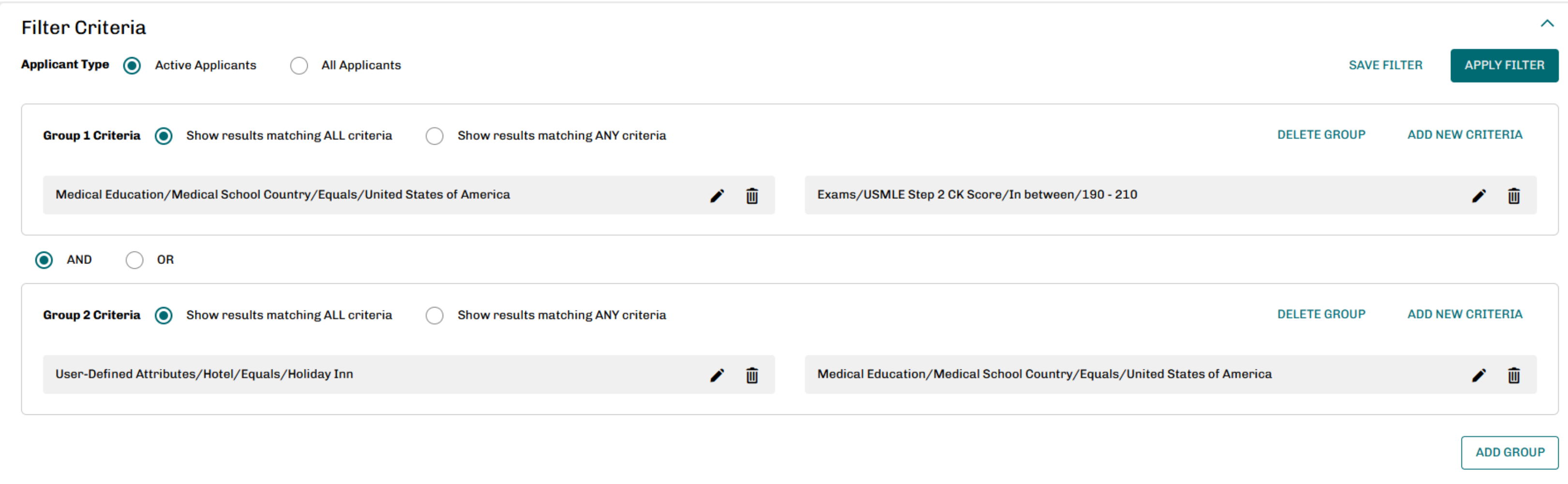
- Click the **Save Criteria** button
- Click the **Add New Criteria** button to add more criteria to the same group.
- In this example, the filter searches for applicants who are U.S. medical school graduates AND have a USMLE Step 2 Score between 190 and 210.



7. When finished specifying criteria, click the **Save Criteria** button.
8. If desired, click the **Add Group** button before applying or saving the criteria to add another group of criteria.
   - 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.
- Construct the criteria for Group 2.

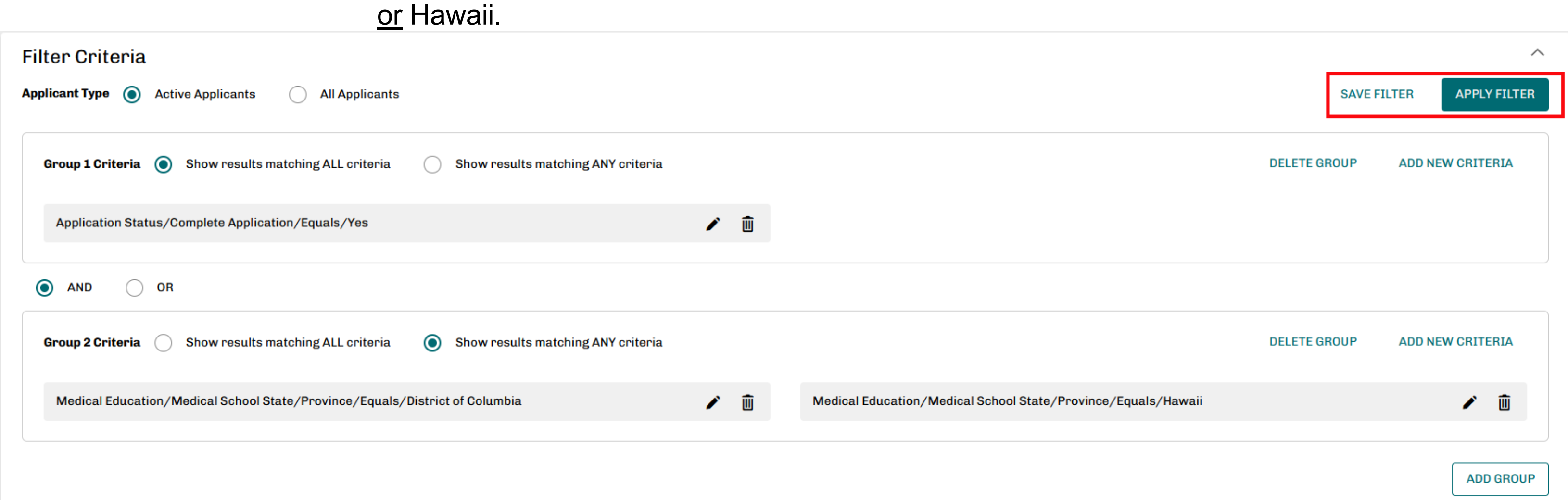


- By adding Group 2, this example searches for:
    1) Applicants who are U.S. medical school graduates <u>and</u> have a USMLE Step 2 Score between 190 and 210,
       <u>OR</u>
    2) Applicants who are U.S. medical school graduates <u>and</u> have a hotel in the holiday inn (a user-defined or custom created attribute).

- Below is a completely different example showing the use of multiple groups. This example searches for:
    1) Applicants who have

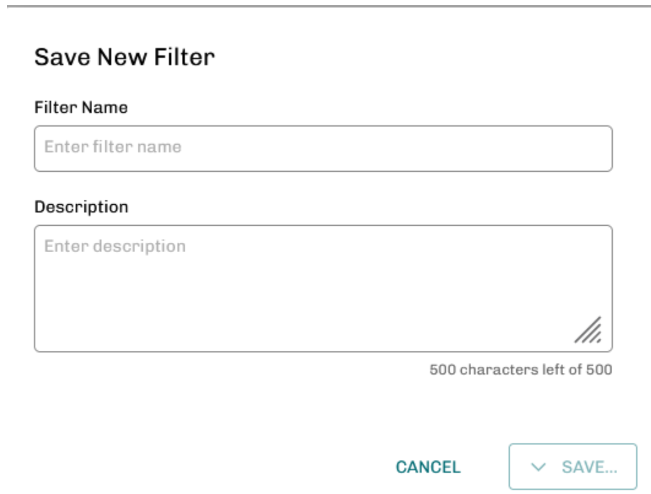
       complete applications, <u>AND</u>

    2) Applicants who attended a medical school in the District of Columbia, <u>or</u> Hawaii.

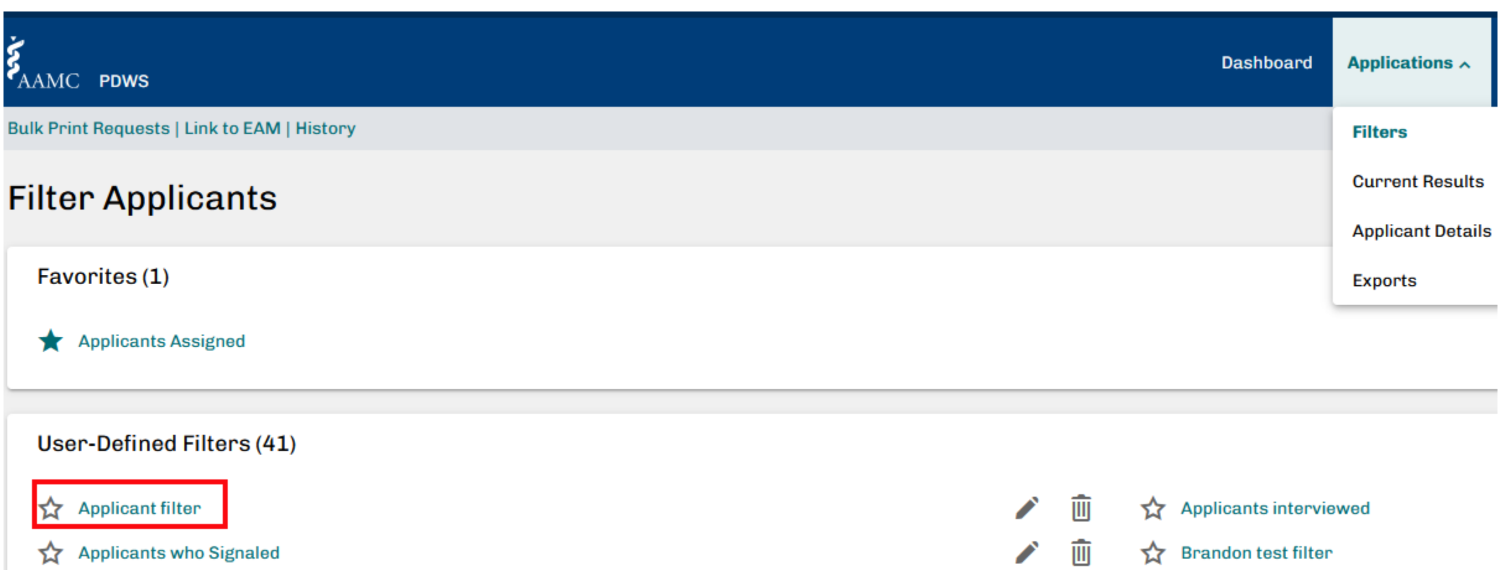


Step 3: Save the Filter

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



1. In the **Filter Criteria** panel, click **Save Filter** button.
    - The Apply Filter 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.
    - 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.
3. Click the **Save** button.
    - The filter now appears under the **Manage Filters** tab in the **User-Defined** panel.



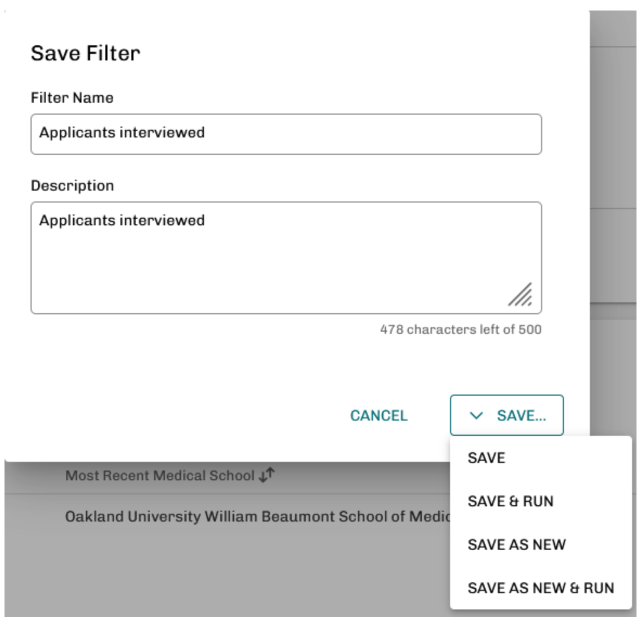
4. Click the filter to apply and display results.

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 **Filters** on the Applications tab.
2. Locate the filter to modify.
3. Click the filter to run it.
4. Expand the **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 **Save** button.
7. To save as a new filter, enter a different filter name, and click the **Save As New** button.



Filter Results

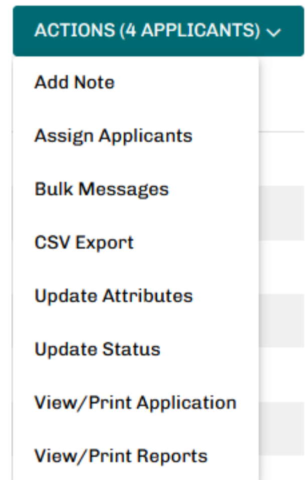
The Results panel displays the applicants that meet the selected criteria. Use the scroll bar or the navigation arrows to view the results. Click the column headings to sort the results in ascending or descending order. Click the applicant name to view the selected applicant's record. Possible actions 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® indicator next to applicants who applied to their program during SOAP®.

Filter Results are not automatically updated when page is refreshed. Re-run the filter to view any changes to the filtered results.

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	Views/prints one of the following reports forthe selected applicant(s): • 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 specialtiesthe 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 theprogram 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 selectedapplicant(s).
CSV Export	Exports a CSV file of selected applicants using an existing template.
Assign Applicants	Multiple applicants can be assigned to programusers (e.g., Reviewers).

To Navigate Through the List:

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

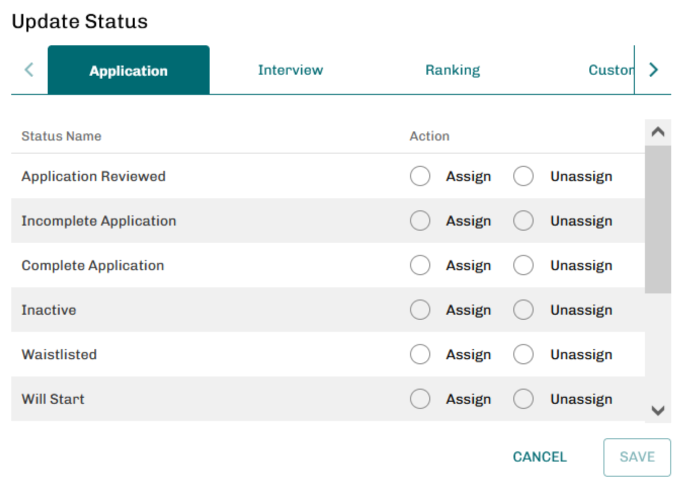
To Search the List of Applicants by Last Name:

- Type the applicants last name in the search bar located under Current Results

To View the Applications:

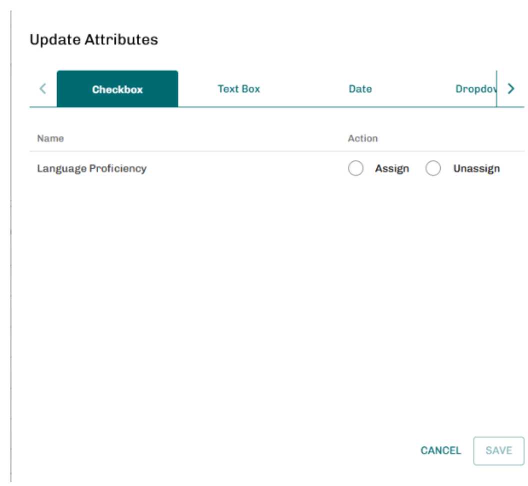
- Click the Applicant name; the application is displayed under the View Applications underthe **Applications** tab.

To Update Status:



1. Select the applicant(s).
2. Select **Update Status** from the Actions drop-down list.
3. Select one of the following status options: Application, Interview, Ranking, or Custom.
4. Make the appropriate changes for the desired statuses.
   - The Assign option will check the box for the desired status.
   - The Unassign option will uncheck the box for the desired status.
5. Click the **Save** button.

To Update Attributes:



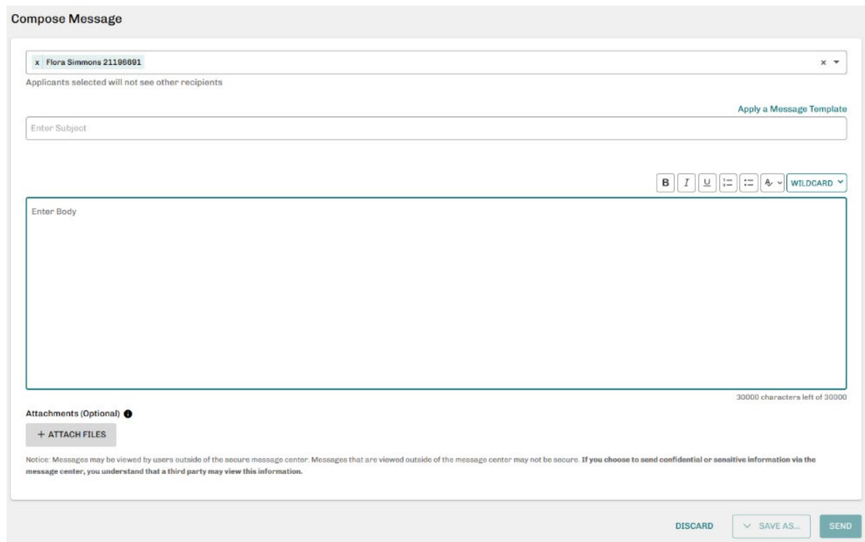
1. Select the applicant(s).
2. Select **Update Attributes** from the drop-down list.
3. Choose the appropriate type of attribute (Checkbox, Textbox, Date, or Drop-down), and make the appropriate changes.
   - The Assign option will check the box for the desired status.
   - The Unassign option will uncheck the box for the desired status.
4. Click the **Save** button.

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

To Add Notes:

1. Select the applicant(s).
2. Select **Add Note** from the drop-down list.
3. Type the note.
4. Click the **Add** button.

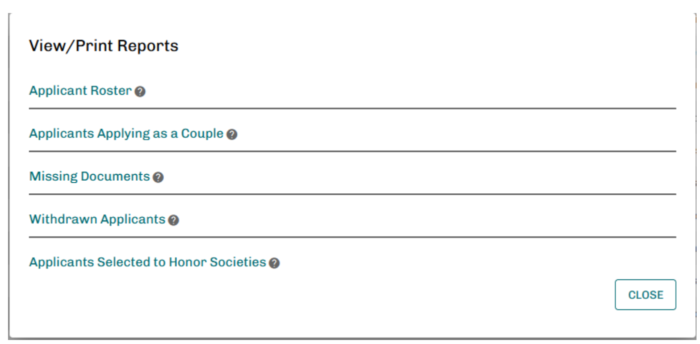
To Send Bulk Messages:



1. Select the applicant(s).
2. Select **Bulk Messages** from the drop-down list.
3. Compose the message and Click the **Send** 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.

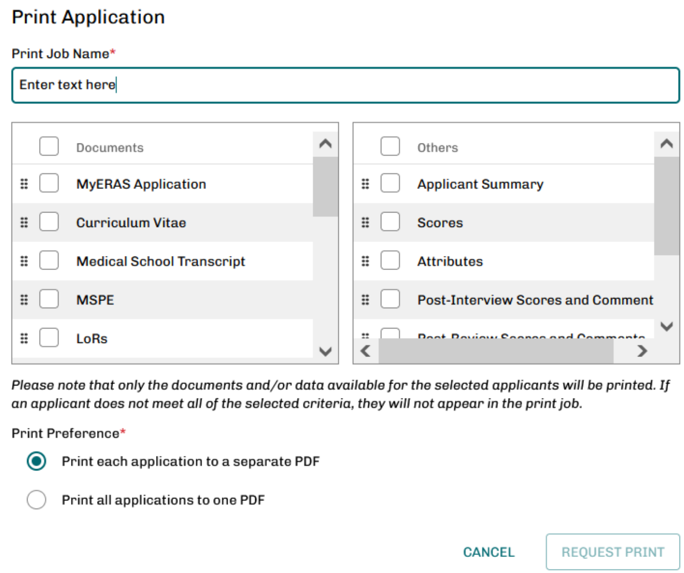


2. Select **View/Print Reports** from the drop-down list.
3. Select a report.
   - A PDF of the report appears in Adobe Reader. The Adobe Reader toolbar offers buttons for saving, printing, navigating, and zooming the PDF report. [Visit http://helpx.adobe.com/reader/using/save-view-search-pdfs.html](http://helpx.adobe.com/reader/using/save-view-search-pdfs.html) 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.



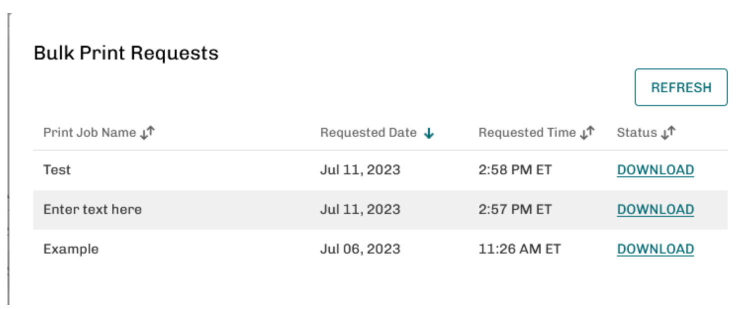
3. Choose the information to view or print; at least one document type must be selected.
   - Choose any other additional information to view or print.
   - Select whether to print each application to its own separate PDF or print each application to one cumulative PDF.

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

4. Enter a Print Job name.

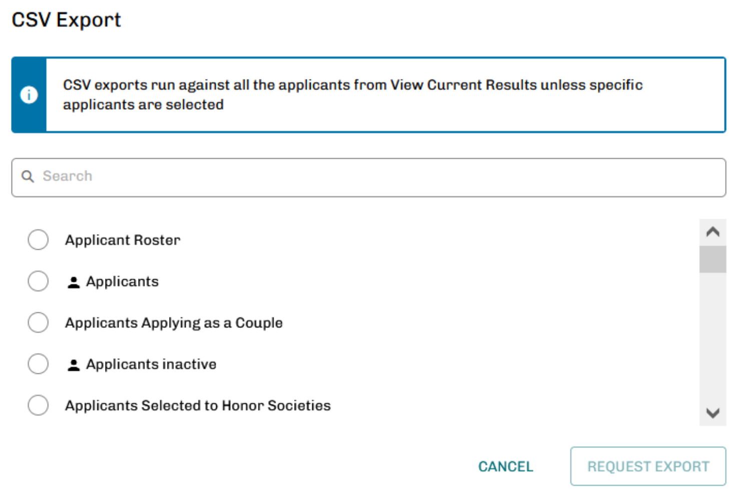
   This name helps identify the print job under Bulk Print Requests.

5. 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.
6. Click the **Bulk Print Requests** link in the header area.
7. 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.



8. Click the report name link under the **Files** column to open or save the report.
9. If the **Print each application to a separate PDF** box was checked, a .zip folder displays with each PDF report listed separately.
   - 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.

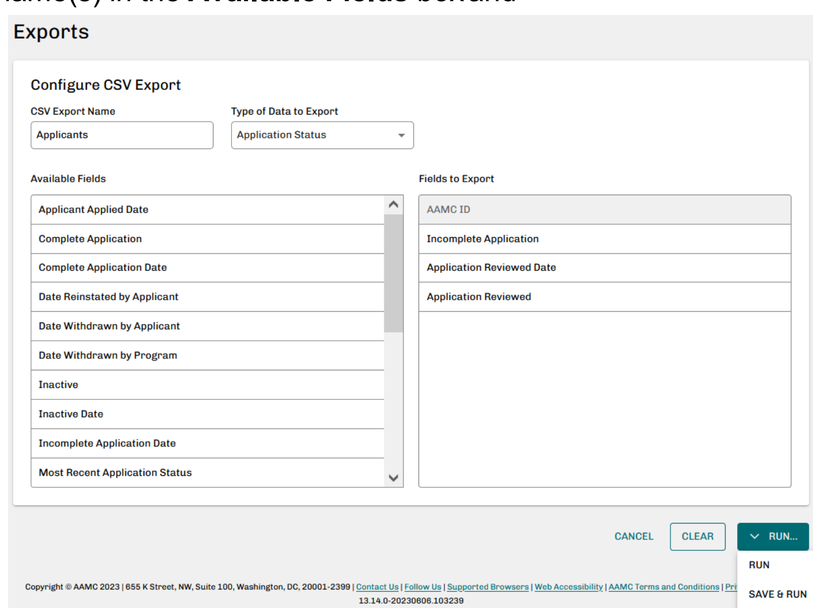
To Run an Export Report:



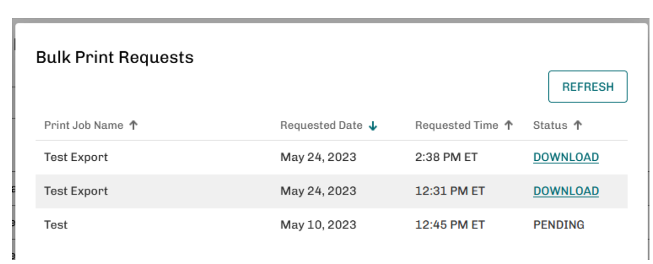
1. Select the applicant(s).
2. Select **CSV Export** from the menu.
3. Select a CSV template to run.
4. Click the **Run Export** button.
5. Click the **OK** button.
6. Close the CSV Templates box to return to the applicant list.
   - The CSV export is scheduled and is viewable from the **Exports** tab in the CSV Exports panel or from the Bulk Print Requests link in the header area.

To Modify an Export Report Template:

1. Under the Exports tab. Select a CSV template to modify.
2. Edit the fields to export by clicking the field name(s) in the **Available Fields** box and using the drag and drop to move and rearrange the desired field(s) in the **Fields to Export** box.



3. When finished, choose **Save & 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.
4. In the **Bulk Print Requests**, click the **Download** status link on the line next to the requested time.
5. 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:

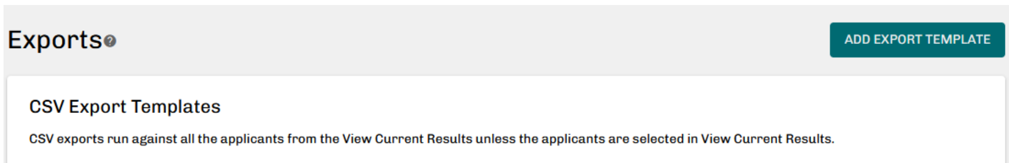
- Education Information.
- Geographic Preference Information
- Interview Information.
- License Information.
- Medical Education Information.
- Publication Information.
- Research Information.
- Qualifying Residency/Fellowship Information.
- Ranking/Track Information.
- Professional Experience Information.
- Program Signal Information
- Race/Ethnicity Information.
- Residency/Fellowship 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.

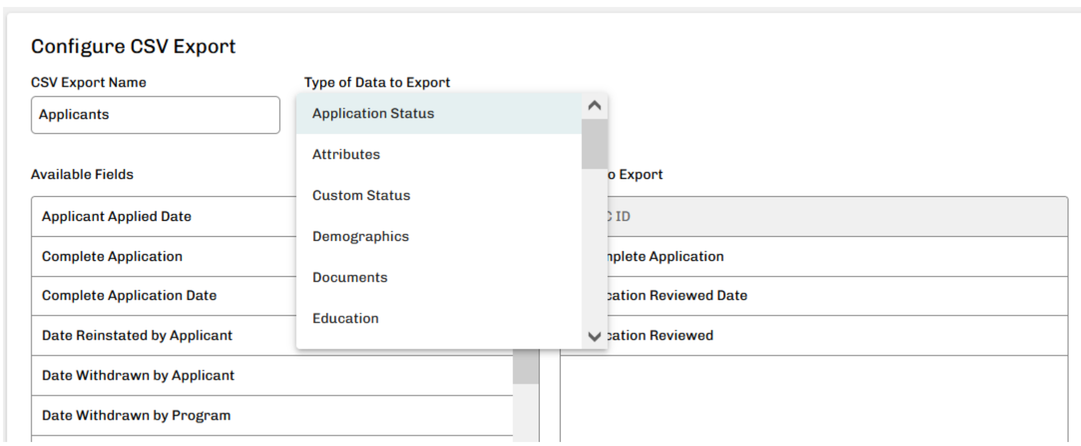
Note: The ERAS system cannot support software outside of the PDWS. Refer to the documentation for that software to successfully transfer information or utilize exported data.

To Create a New Export Template

1. On the Exports tab, click the **Add Export Template** link.



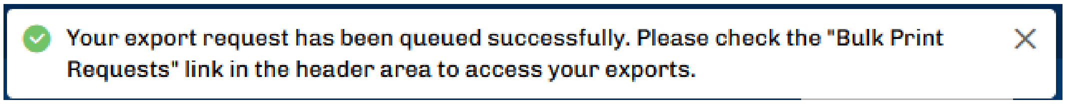
2. Type a name for the template in the **CSV Export Name** box.



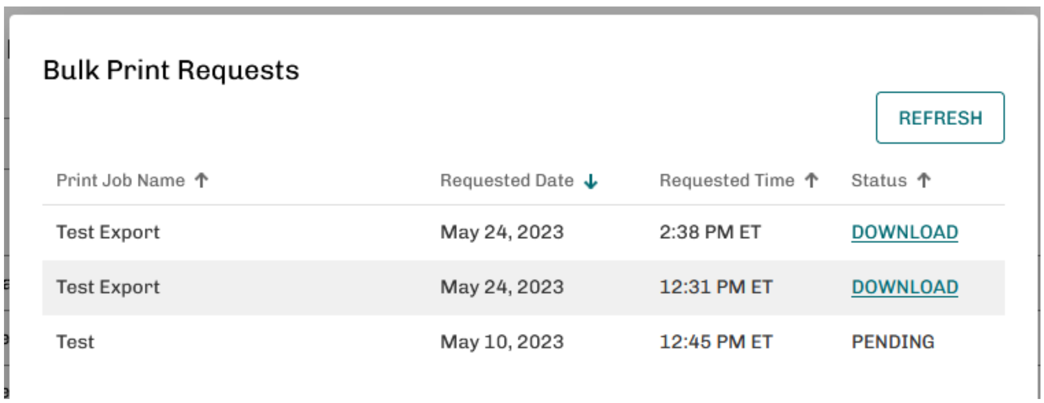
3. Select **Type of data to export** from the drop-down.
   - The type of data selected controls the fields listed in the Available Fields box.
4. Select the fields to export by clicking the field name(s) in the **Available Fields** box and using the arrow buttons to move and rearrange the desired field(s)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

5. When finished, choose **Save & Run** to save the template for repeated useand 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 Bulk Print Requests in the upper-left area of the screen.



7. Click on **Complete** next to the CSV export name to open or save theexport.

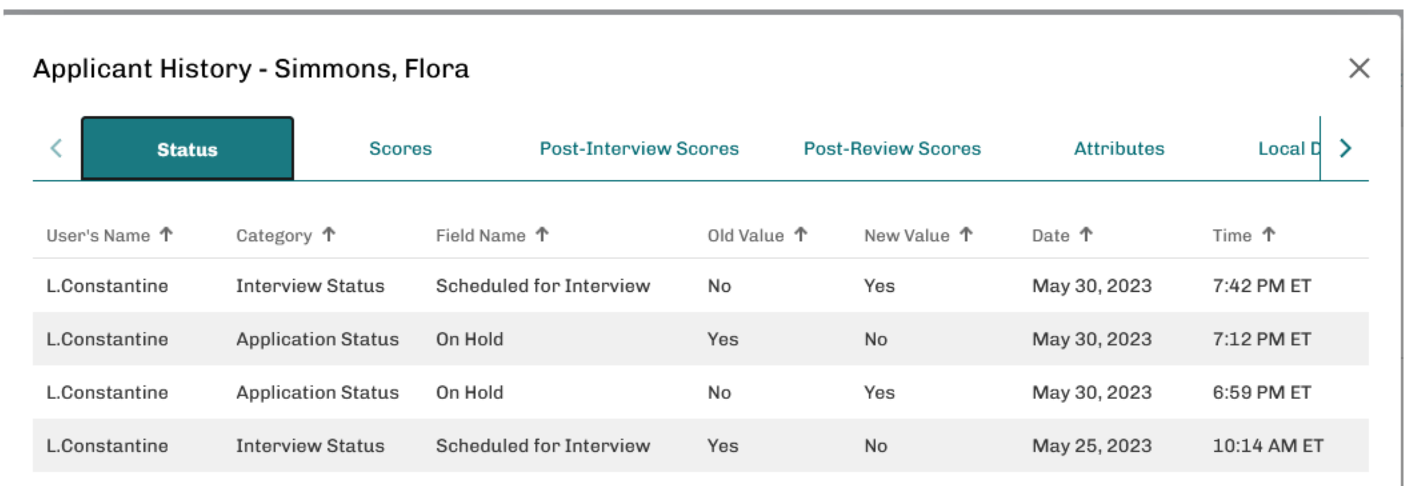
- CSV exports are also viewable from the **Exports** tab or from the Bulk PrintRequests link in the header area.

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.

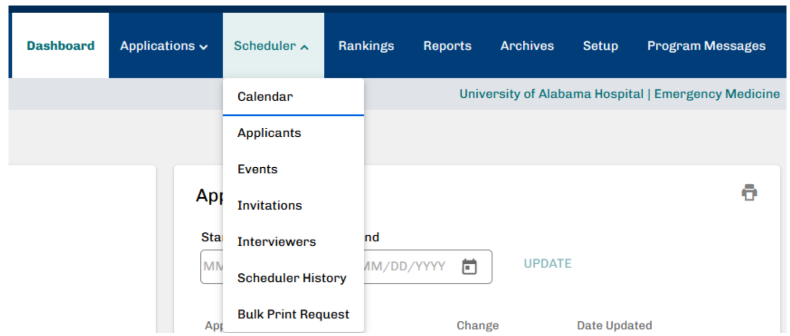


User's Name	Category	Field Name	Old Value	New Value	Date	Time
L.Constantine	Interview Status	Scheduled for Interview	No	Yes	May 30, 2023	7:42 PM ET
L.Constantine	Application Status	On Hold	Yes	No	May 30, 2023	7:12 PM ET
L.Constantine	Application Status	On Hold	No	Yes	May 30, 2023	6:59 PM ET
L.Constantine	Interview Status	Scheduled for Interview	Yes	No	May 25, 2023	10:14 AM ET

Scheduler

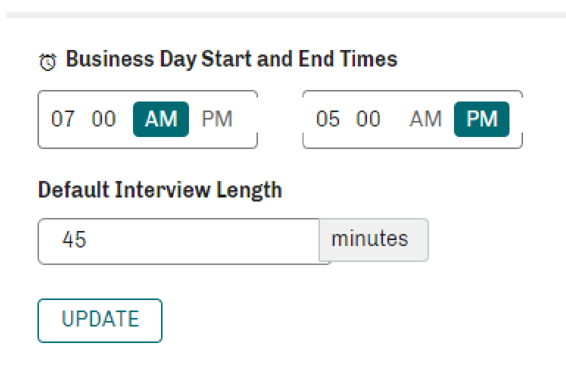
The **Scheduler** is designed to make scheduling applicants through the PDWS flexible. There is an option for privately scheduling applicants, and an option to send interview date(s) to applicant(s) and allow them to self-schedule.

Scheduler Setup

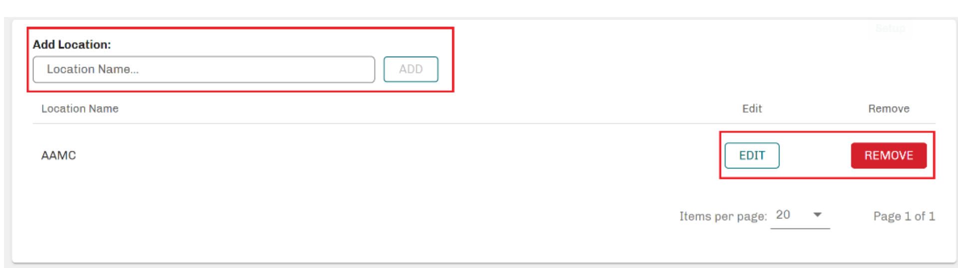


The setup tab under scheduler of PDWS provides a central location for those with the appropriate permissions (Super Users and Coordinators) to set up scheduler defaults for the Calendar, Locations, Reports, Interviewers, and Waitlist.

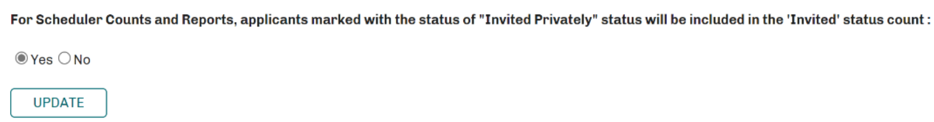
The Calendar section allows users to set the start and end times of the business day for interviews and to set the default interview length.



The Locations section allows users to add Locations for interviews for selection when creating interview information. Locations can be edited and removed.

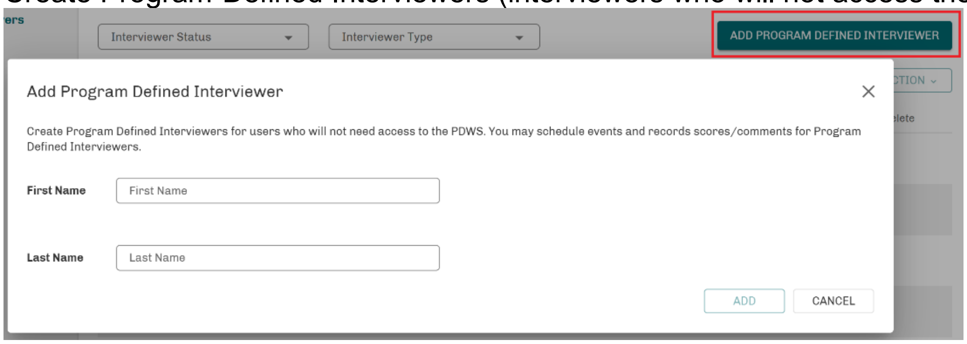


The Reports section allows users to toggle Scheduler counts to display applicants with the Invited Privately status separately from those with the invited status.

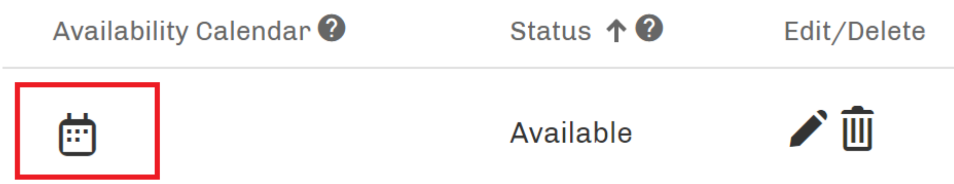


The Interviewers section in Setup allows users to do the following:

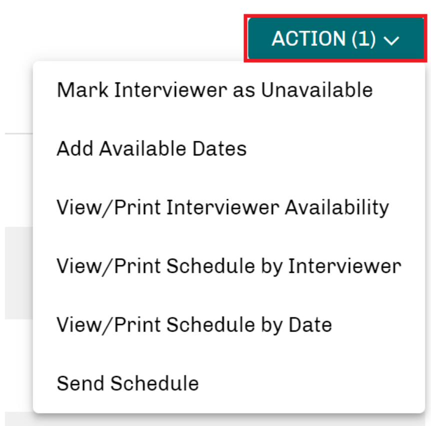
- Create Program-Defined Interviewers (interviewers who will not access the PDWS).



- Select dates of availability for the season for both AAMC Registered Interviewers and Program-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.



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 gray 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.

By default, all events show on the calendar; check one or more type of event to only show those events on the calendar. Sort 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, Alternate 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.

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

Back in the **Applicants View**, the **Action Column** offers several options.

1. Click on the drop-down arrow to view the following options:

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 anydates.
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**.
Mark as Invited Privately	Changes the applicant's interview status to **Invited Privately**.

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

Bulk actions are also available in the Applicants view via the Invite drop-down menu. Click on the drop-down arrow to view the following list of bulk action options.

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**.
Un-Mark as Interviewed	**Removes** applicant's interview status for **Interviewed**.
Mark as Declined	Changes the applicant's interview status to **Declined**.
Un-Mark as Declined	**Removes** applicant's interview status for **Declined**. Programs may un-mark an applicant's Declined status if an applicant accidentally declines an interview.
Mark as Invited Privately	Changes the applicant's interview status to **Invited Privately**.
Un-Mark as Invited Privately	**Removes** the applicant's interview status for **Invited Privately**.
View/Print Application	Creates a bulk print request for the selected applicant's applications and supporting documents. The completed file will be available under the Bulk Print Requests tab.
View/Print Scheduled Applicant Report	Creates a bulk print request for the selected applicant's scheduled events based on a start date and end date. The completed file will be available under the Bulk Print Requests tab.

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
RSVP	test	Jun 15, 2022	ALL DAY	Jun 15, 2022	0	0/0	0/5	N/A	N/A
Private	Interview 1	Jun 21, 2022	ALL DAY	N/A	N/A	0/3	1/7	0/1	0/1

Invitations

The **Invitations View** tracks all RSVP 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. Saved drafts that have not been sent to applicants will also be found here.
Note: Only RSVP Events can be sent through Invitations.

To Sort the Columns:

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

Search

REFINE SEARCH RESULTS

Status	Name	Sent Date		Applicants	Events
Sent	Example 16	Jul 5, 2023	1	2	
Sent	Fast	May 25, 2023	1	1	
Sent	October invitation	Jun 27, 2023	1	1	
Sent	October Invitations	Jun 27, 2023	1	1	
Sent	test	May 25, 2023	1	1	

Total Items: 5

Items per page: 20

Page 1 of 1

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.

Scheduler History

The **Scheduler History 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.

Bulk Print Request

The **Bulk Print Request View** displays all Print Job requests generated from the Interview Scheduler and their respective file name, requested date, and status. From the Applicants View, select the applicants and using the drop-down menu for bulk actions click View/Print Application. Follow the steps to confirm the bulk print request. From the Bulk Print Request view, click on the file name once the status is Complete to download the file(s).

Create a Private Event

Private Event(s) appear on the calendar in gray 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 drop-down arrow next to **New Event.**
3. Click on **New Event**.
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 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.

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 to pair them with an Interviewer. From the Scheduled column, **select applicants** by checking on the box next to their name. The drop-down filter for Paired Status allows users to search for applicants based on their paired status.
    - Paired Applicants – an applicant who has been assigned an interviewer
    - Unpaired Applicants – an applicant who has not yet been assigned an interviewer
    - Applicants without time slot – an applicant who is scheduled for an event; but, has not yet assigned a time slot.
3. Within the Scheduled Column, click on the drop-down arrow. Click on **Add to Interview.** A pop-up screen appears. At the top, select a specific **time frame** and **location**. To set the time, click outside of the box.
4. **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 Scheduler Setup.

5. Click **Save.**
6. 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 can be included in Scheduler Invitations. A Scheduler Invitation can include multiple applicants and RSVP dates. Applicants included in an invitation will not be able to see other applicants who were also invited. Applicants can schedule themselves for one of the available dates **or** waitlist themselves for multiple RSVP Event 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 and, 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.
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 once an applicant has RSVPed for an event.

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.

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.
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.)

5. 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 <u>one</u> RSVP event. Waitlist themselves for multiple events. Lastly, click Send Invitation.
Note: More than one (1) event may be selected.
7. 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 the **Invitations** button. **Note:** By default, invitations sent will automatically appear in alphabetical order by Invitation Name.
8. 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:

1. Click on an existing RSVP 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. The drop-down filter for Paired Status allows users to search for applicants based on their paired status.
    - Paired Applicants – an applicant who has been assigned an interviewer.
    - Unpaired Applicants – an applicant who has not yet been assigned an interviewer.
    - Applicants without time slot – an applicant who is scheduled for an event; but has not yet assigned a time slot.
3. Within the Scheduled Column, click on the 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 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.
6. Click **Save.**
7. 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 provided but there is also an option to edit the message if needed. All applicant notifications will be bcc'd and sent to the applicant's MyERAS Message Center.

Scheduler Setup

The **Scheduler Setup** tab of PDWS provides a central location for those with the appropriate permissions (Super Users and Coordinators) to set up scheduler defaults for the Calendar, Locations, Reports, and Interviewers.

The Calendar section allows users to set the start and end times of the business day for interviews, and to set the default interview length.

The Locations section allows users to add Locations for interviews for selection when creating interview information.

The Reports section allows users to toggle Scheduler counts to display Invited Privately status applicants separately from Invited status applicants.

The Interviewers section in Setup allows users to do the following:

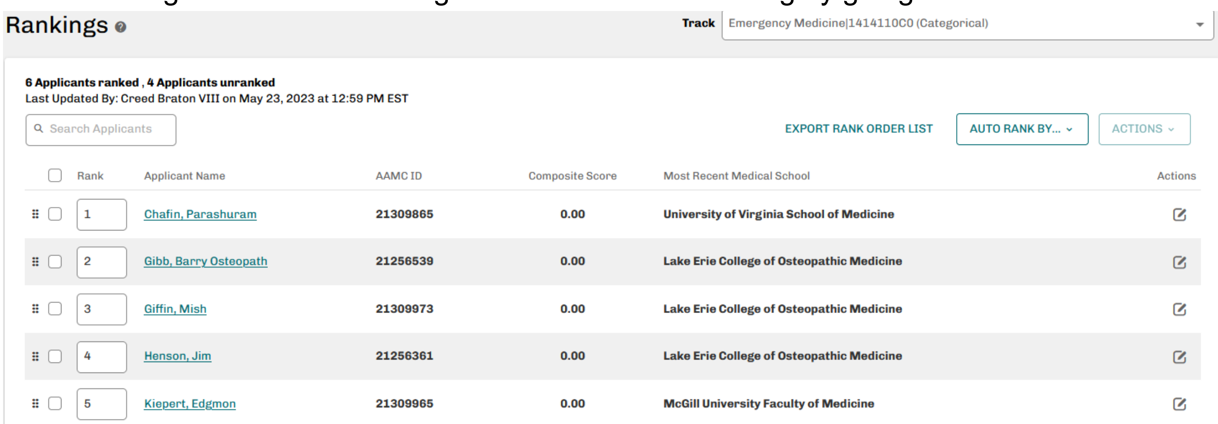
- Create Program-Defined Interviewers (interviewers who will not access the PDWS).
- Set up availability for the season for both AAMC Registered Interviewers and Program-Defined Interviewers.
- Display interviewer availability in two different views: by interviewer and by date.
- Use the bulk action to view/print reports, add available dates, and mark interviewers as available or unavailable.
- The Waitlist section allows users to toggle on the Waitlist Automation Feature. Users are able to craft an outgoing message as well to applicants that have been pushed into open schedule slots.

Rankings

The **Rankings** tab of PDWS is used to review, compare, and rank applicants. The Rankings 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).

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

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.
Print Applicant Summary	Used to view/print the Applicant Summary of all selected applicants in the Rank tab.
Send Message	Used to send a message to selected applicants.

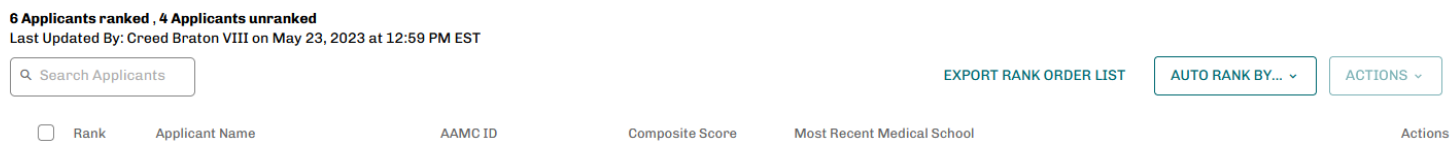
Note: To review an individual applicant, click the Applicant name to open the applicant’s application in another window.

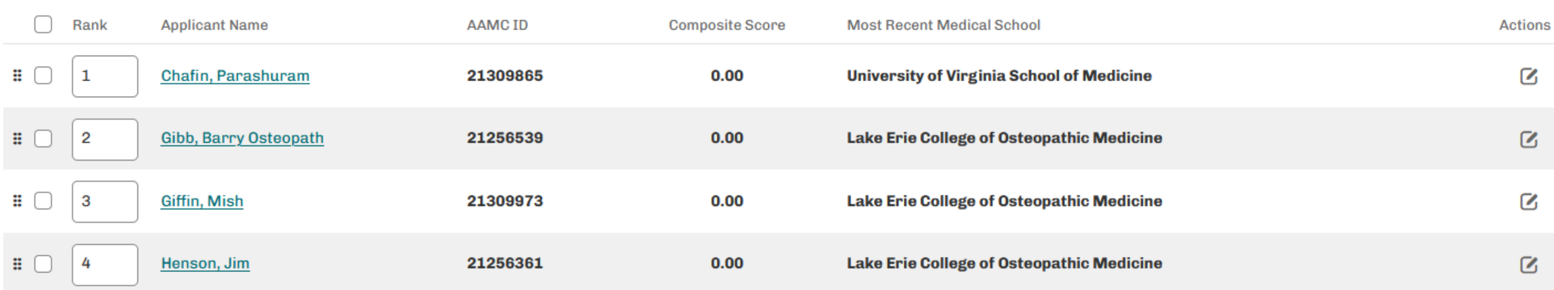
Sort Applicants

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 AAMCID).
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.





Enter Comments

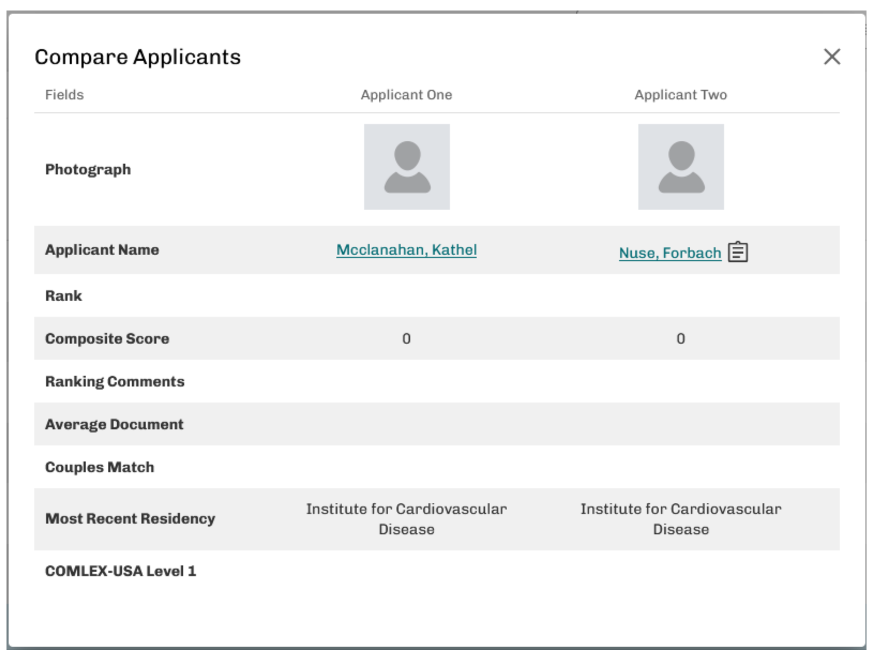
To Enter a Comment:

1. Click on the comment icon present under Actions name.
2. Type the comment.
3. Click the **Spell Check** button to perform a spell check.
4. Click the **outside of the textbox** to save the comment.
   - Note the Comment icon has changed. Click the **Comment** icon to expand the comment box for easier reading.

Compare Applicants

To Compare Applicants:

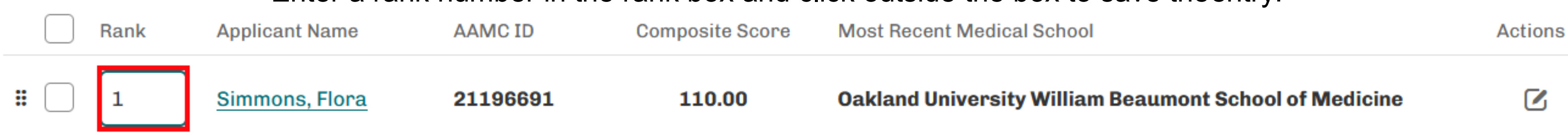
1. Select two or three applicants from the Rank tab.
2. Select **Compare** from the Bulk Action drop-down list.
3. The window will allow users to compare the applicants. Click **Close** button to close the window.
   - The fields on which each applicant are compared were selected in the Comparison Tool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



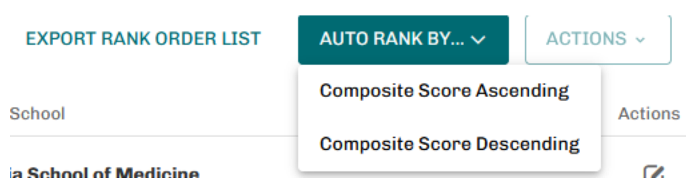
Rank Applicants

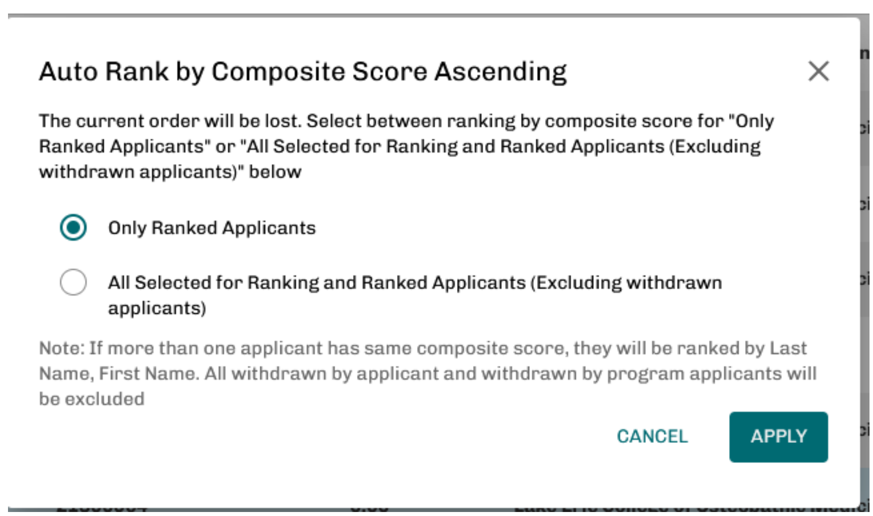
To Rank Applicants:

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.



3. Click the Auto Rank By drop-down and select **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.





View Applicant Information from Ranking

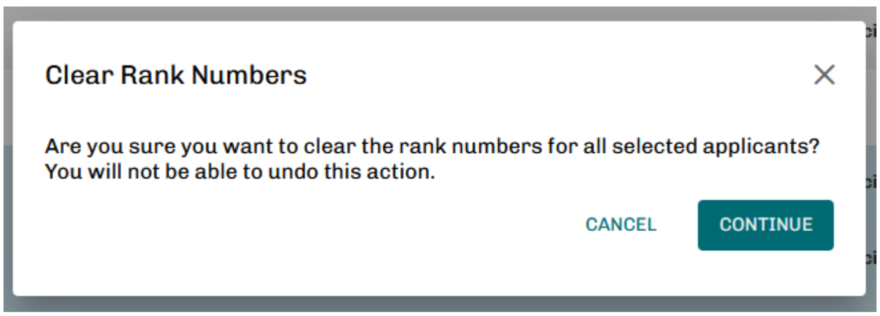
To View an Applicant's Information from Ranking:

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

Clear Rank Numbers

To Clear Rank Numbers:

1. Select the applicant(s).
2. Select **Clear Rank Numbers** from the Actions drop-down list.
3. Click the **Continue** button.

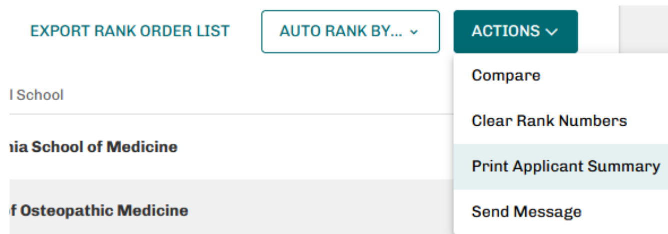


- The applicant(s) rank value is updated with N/A and the record moves along with the un-ranked applicants in the grid.

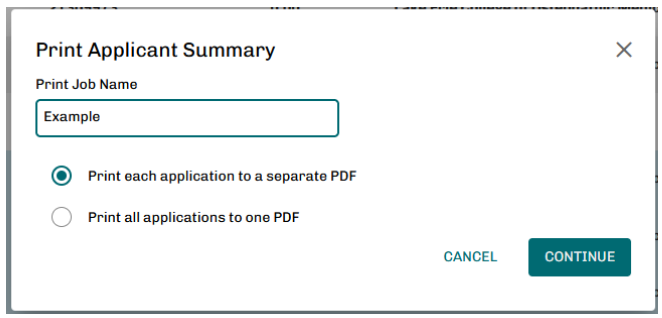
Print Applicant Summary Reports for Multiple Applicants

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

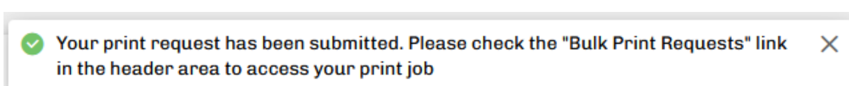
1. Select the applicant(s).
2. Select **View/Print Applicant Summary** from the Bulk Action drop-down list.



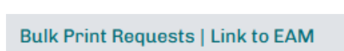
3. Enter a **Print Job Name**.

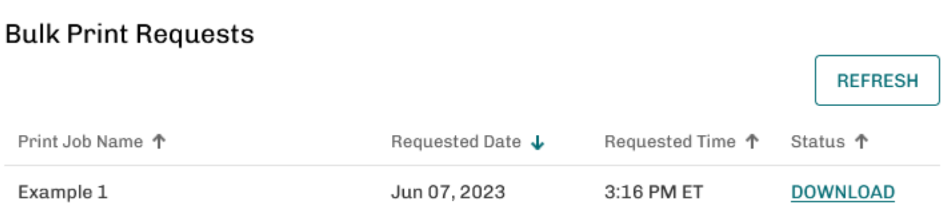


4. Select whether to Print each application to a separate PDF or Print all applications to one PDF.
5. Click the **Continue** button.
   - A message confirming you request will appear



6. Click the **Bulk Print Request** link in the header area to access the printjob





7. In the Print Requests box, download in the Status column. The report will download to your local machine and can be opened from there.

AAMC ID: 21196691
Full Name: Simmons, Flora
Preferred Name:
Current Address:
600 canal st
Saint James,
Barbados
E-mail:
Preferred Phone #:

Most Recent Medical School:
Oakland University William Beaumont School of Medicine
Location: Rochester, MI, USA
Graduation Date: Apr, 2024
Degree Type: MSURG

Participating in the NRMP Match: Yes
Participating as a Couple in NRMP: No

Authorized to Work in the US: Yes
Current Work Authorization: DACA - Deferred Action for Childhood Arrivals
Visa Sponsorship Needed: No
Basis For Work Authorization: U.S. Citizen or National, Legal Permanent Resident, Refugee, Asylee

Most Recent Residency: None

Program Signal

Yes

Geographic Preferences

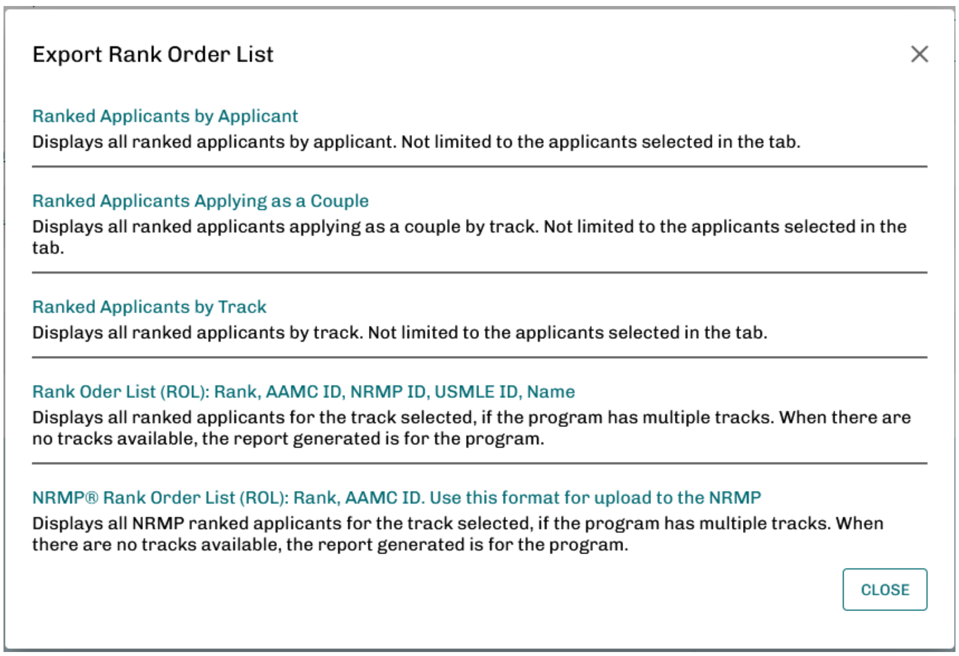
Division Preference:
Setting Preference: Urban

- 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

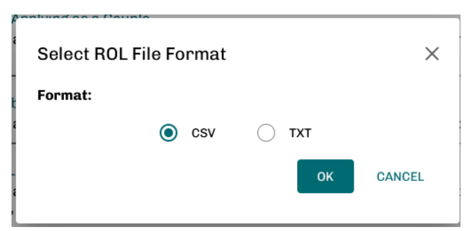
To Create a Rank Order List (ROL) Report:

1. Click **Export Rank Order List (ROL)**.



- 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, AAMCID.

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		

- Export TXT:

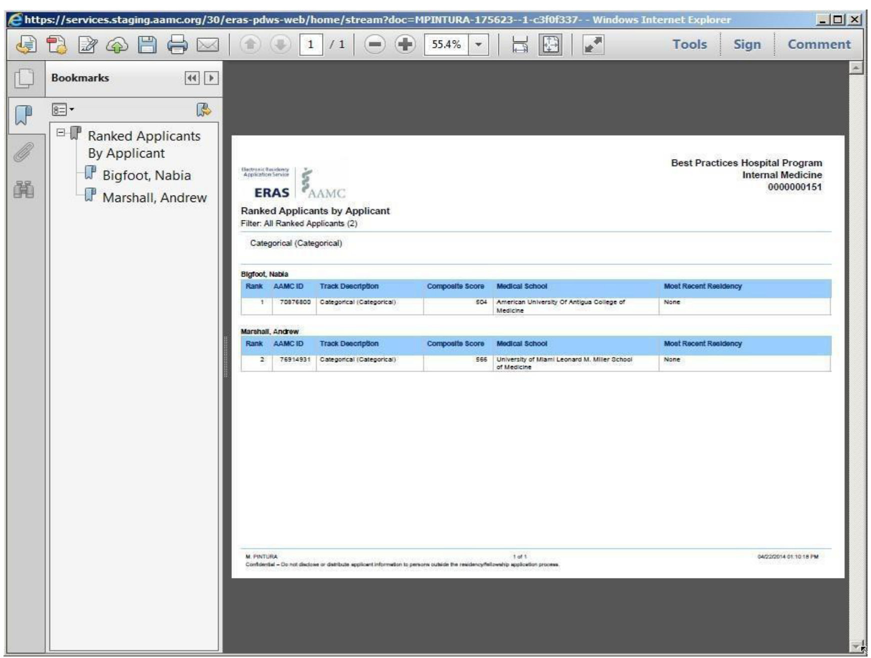
File Edit Format View Help

```
1,21300065
2,34556539
3,12309973
4,98756361
5,09809965
```

View/Print Ranking Reports

To View/Print Ranking Reports:

1. Click **Export Rank Order List**
2. Select the desired report to view or print.

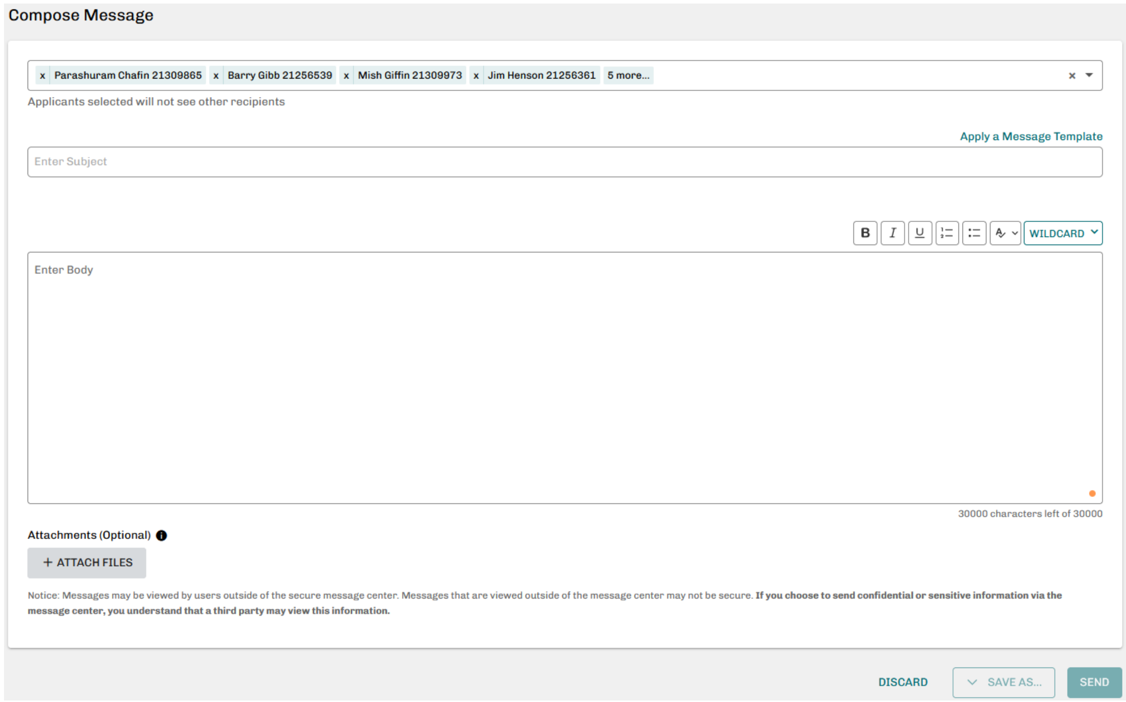


- The Adobe Reader toolbar offers buttons for saving, printing, navigating, and zooming in the PDF report.
- Visit http://helpx.adobe.com/reader/using/save-view-search-pdfs.html for help on how to use Adobe Reader.

Send Messages

To Send Messages:

1. Select the applicant(s).
2. Select **Send Message** from the Actions drop-down list.



3. Enter a **Subject**.
4. If desired, use the **Apply a Message Template** option to select a pre-defined template message.
5. If desired, use the **Attach a File** link to include a document with the message.
6. Enter a message in the body.
7. 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.

   (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.	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
Applicant Summary in Ranking	Summary of the applicant's quantitative and qualitative attributes.	Rankings tab – View/Print Applicant Summary as Bulk Action
Ranked Applicants by Applicant	All ranked applicants. The report is not limited to the applicants that were selected in the Ranked tab.	Rankings tab – Ranked tab – View Reports button
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.	

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.	Setup tab, Manage Users – View/Print Reports
Rank Order List (ROL)	All ranked applicants based on tracks.	
NRMP® Rank Order List (ROL) Role Assignments by Level	All NRMP® ranked applicants based on tracks. If there are no tracks, the report is for the program. Institution and/or Program users and their active roles.	
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 Report	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 Selected Applicants	Results of the program's applicationreview and evaluation activities List of selected applicants selected forthe interview process.	Reports tab Reports tab
Invited Applicants	A list selected of applicants invited to an interview.	
Invited Privately Applicants	A list of applicants invited privately to 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 been declined for an interview.	
Paired Applicants	A list of applicants who are scheduled for an event and also paired with at least one interviewer for that event.	
Unpaired Applicants	A list of applicants who are scheduled for an event and not paired with at least one interviewer for that event.	
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.	

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 the MyERAS system to access attachments and reply to the message.

Applicants cannot initiate messages to a program from the MyERAS system.

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 interviewersusing 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 andapplicants selected for ranking using the bulk action of Bulk Messages.

Folders

Folder listing:

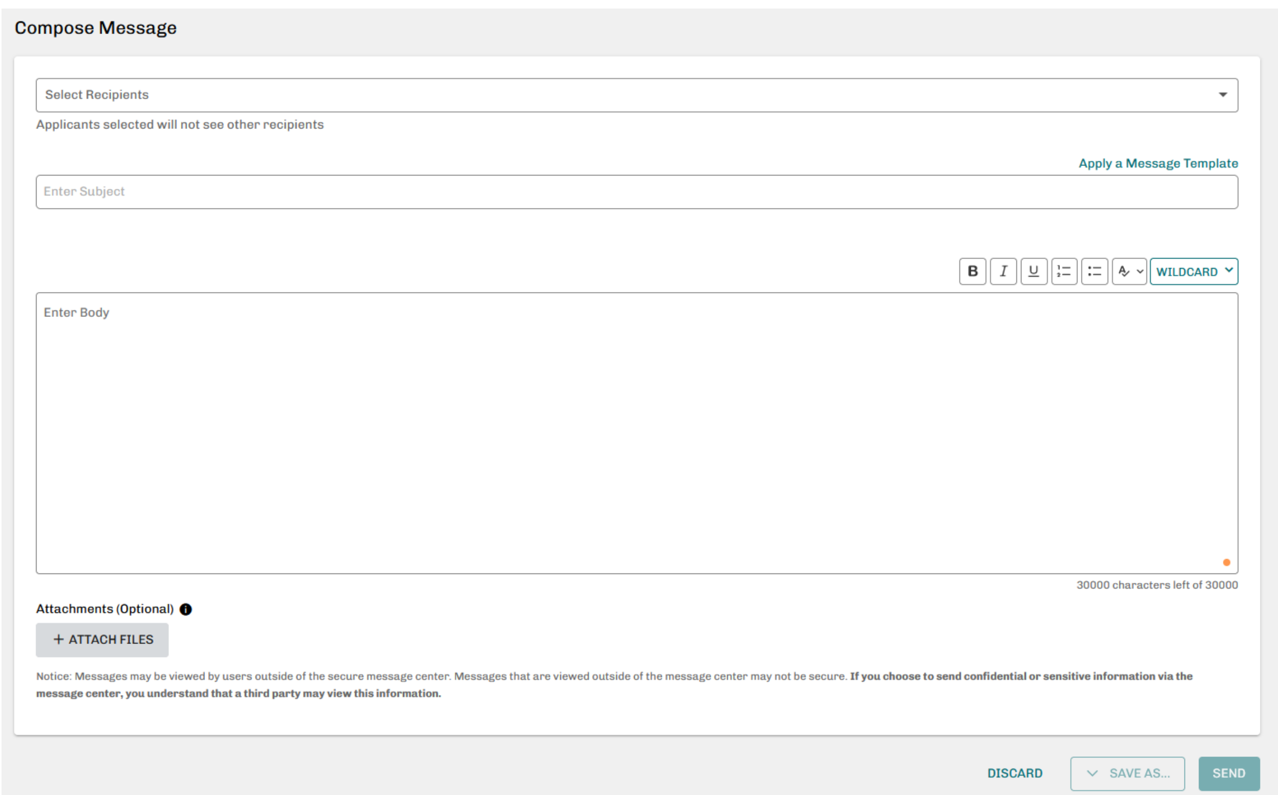
Compose	Starts a new message to an applicant. Type the Applicant Name (the field uses predictive text based on letters being typed), the AAMC ID.
Inbox	Displays messages from applicants. The three subfolders can be renamed for a program's organizational purposes.
Sent	Contains messages sent to applicants 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 135).

   - 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.



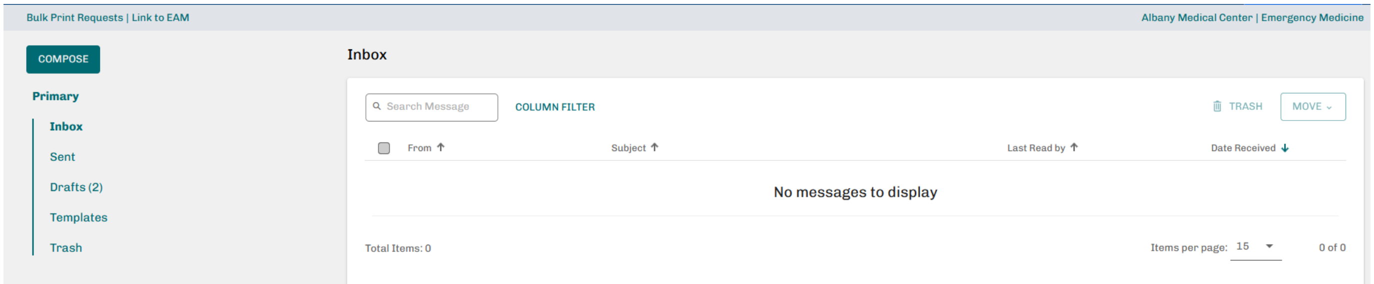
2. Enter a **Subject** and **Message**; both text boxes must be entered to send a message.
   - Special formatting (bold, underline, italics) as well as spell check with a medical dictionary is available.
   - The Wildcard option allows users to personalize messages by creating a merge field for first, last, or full names in bulk messages.
   - Use the **Apply a Message Template** option to select a pre-defined template message.
   - Use the **Attach Files** 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 5MB.
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 later.
   - 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.

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 the MyERAS system, 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

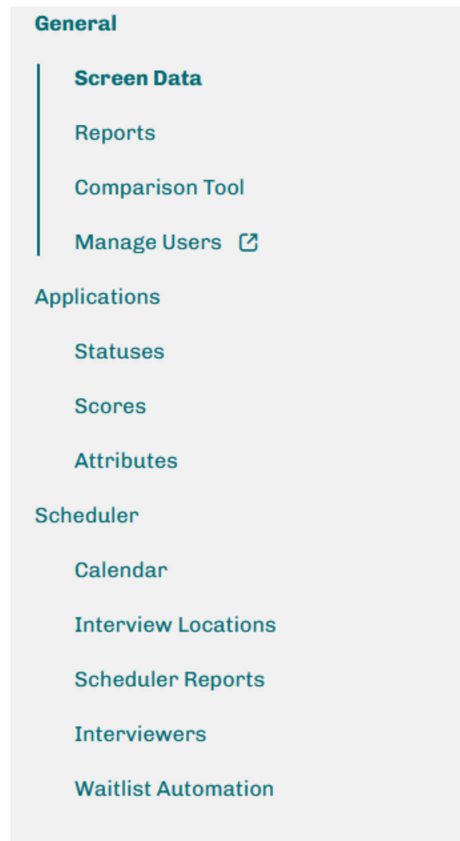
To find messages using the search bar, type in a keyword or phrase related to the email you are looking for.

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.

The major tasks performed in Setup include:

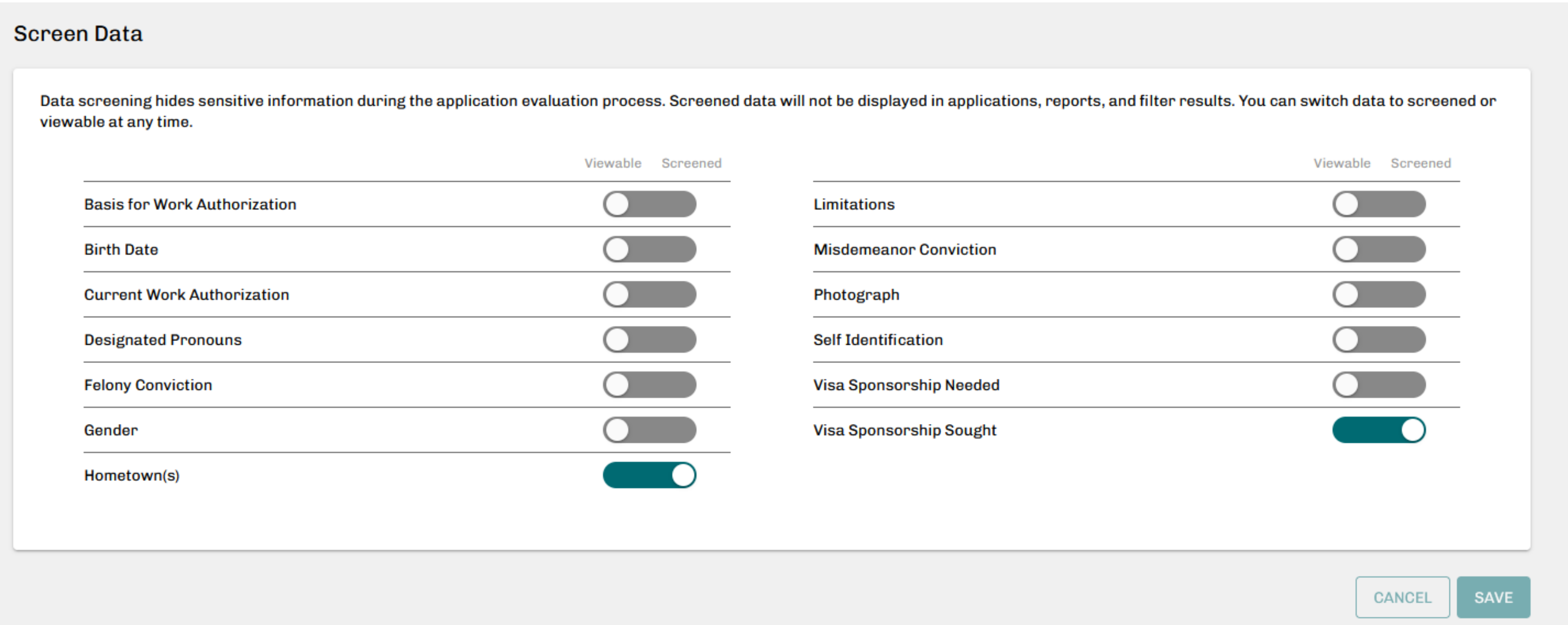
- Determining which items are screened during the application evaluation process.
- Adding statuses and scores to display when evaluating applicants.
- Creating searchable data fields specific to your program, known as attributes.
- Managing users.
- Setting up the ranking comparison tool.



General Data

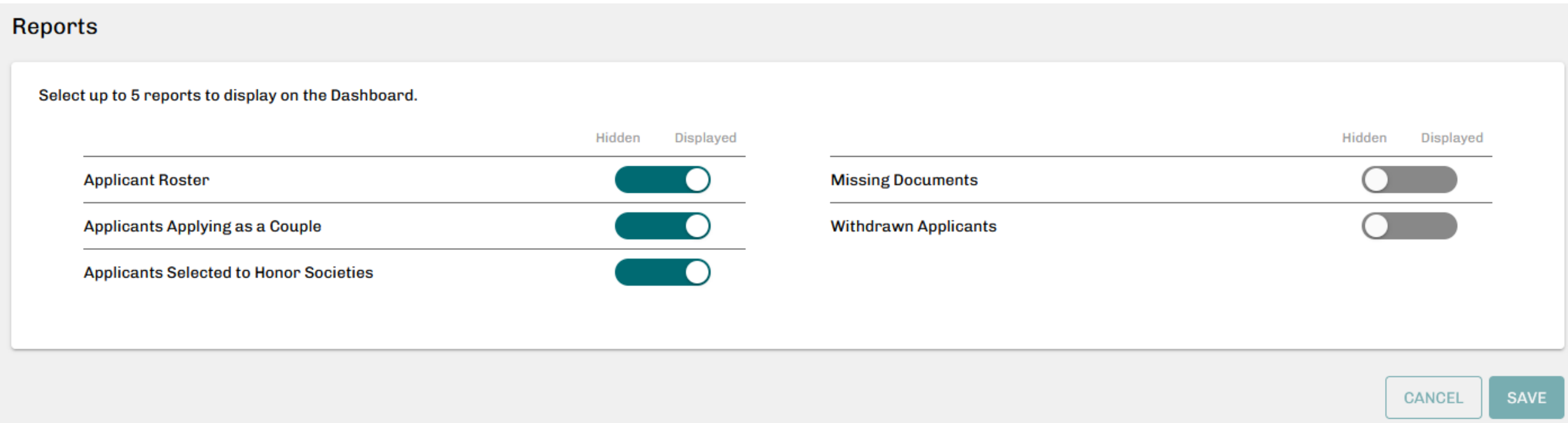
Screen Data

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.



Reports

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

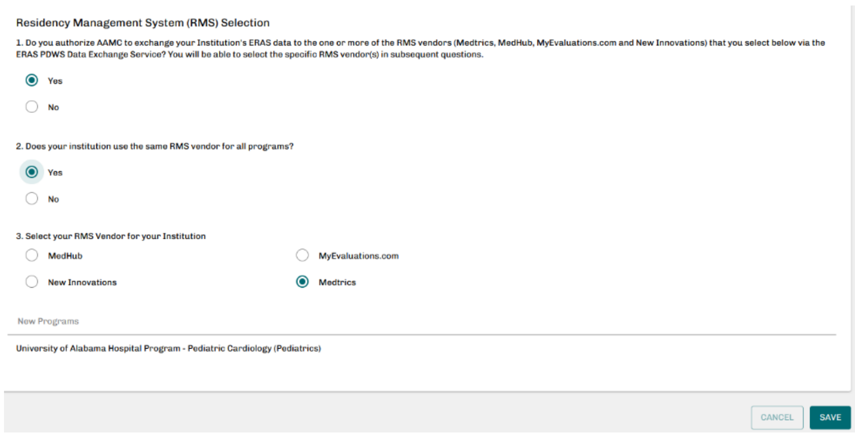


RMS Selection

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 MedHub, Medtrics, 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.

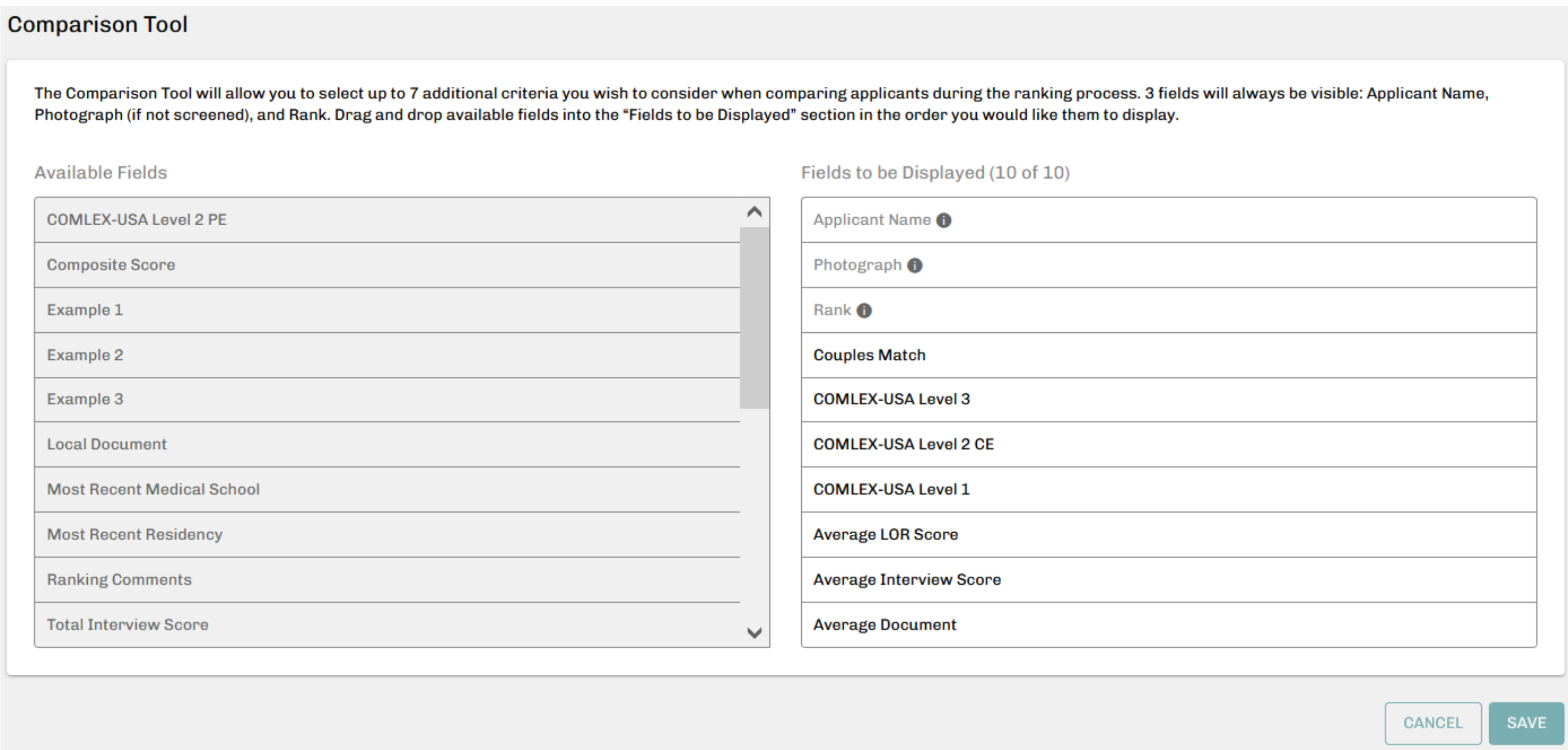
Note: For the RMS vendor to have access to ERAS data, programs will need to mark the status of all incoming applicants as “Will Start.” Programs then need to request the data from the RMS vendor portal.



Comparison Tool

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 10 items, which can include both system-defined and custom scores, to display in the Comparison Tool. Drag and drop items from Available Fields to the Fields to be Displayed.



To Set Up Ranking Items to Display:

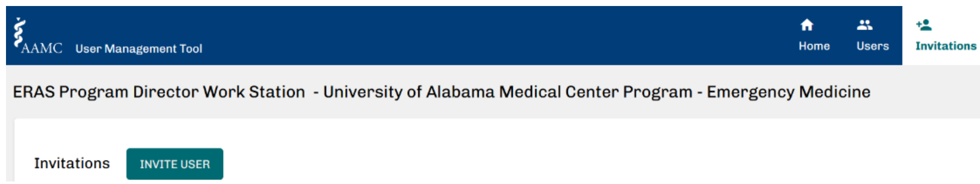
1. Select **Comparison Tool** from the General setup submenu.
2. Select up to 10 items from the **Available** column that you want to be included in the Rankings Comparison Tool.
3. Use the drag and drop feature to move the item to the **Fields to be Displayed** column.
    - Use the drag and drop feature to change the order in which the criteria will display when comparing applicants for ranking.

Manage Users

Users with a Coordinator or Super User role can invite new users (for equal access or lower) to access the PDWS using the User Management Tool (UMT) in the Setup tab.

Invite a new user:

1. Click the **Invite User** button under the Invitations tab.



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.
   a. The system sends an email to the new user and changes the user's status to Invited.
   b. The invited user receives an email invitation with a link to the PDWS and instructions to:
      i. Register for an AAMC account or log in with an existing AAMC account.
      ii. Verify their email account (only if a new AAMC account was created).
   c. After the user logs into PDWS and accepts the *Terms and Conditions*, the user will be able to access the system and they will become Active users.

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:

6. Username.

7. Email.

8. Confirm Email.

9. Three Security Questions and Answers.

10. Password.

11. Confirm Password.

12. Click the check box to accept the Privacy Statement and the AAMC Web site Terms and Conditions.

13. Click **Register**.

    - A message appears indicating that a message was sent to confirm the email address.

14. If a new account user, open the email with the subject: "**Complete Your AAMC Account Registration"**.

15. To complete the registration, click the link in the body of the message.

    - The **Account Verified** screen appears with a link to **Sign In**.

16. Click the **Sign In** link.

17. Log in and accept the terms to use the PDWS.

    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 Assign or Revoke a Role for an existing user:

1. Select an existing user from the **Users** tab.

2. Click on the three dots under the Actions column.

3. To assign a new role, click **Grant Roles**.
   Note: The roles of a user may be swapped, but users should **not** be assigned more than one role.

- Select a Predefined role and click **Grant Roles** to assign an additional role to theuser.

4. To revoke an existing role, click the **Revoke** Roles under the actions column.
5. To Assign and Revoke roles in bulk:

- Select multiple users.
- Under Bulk Actions, select Extend Roles or Revoke roles.
    - ✓ Note: Selecting **Extend Roles** will extend the expiration date for the selected user(s).

To Filter and Reorder the List of Users by Status:

- **Colum Filter** allows users to filter and search for items within a specific column:
    - Last Name
    - First Name
    - Email Address
    - Expiration Date
    - Roles
- **Reorder** allows users to reorder columns using the left and right arrows.
- Show/Hide allows users to select the following columns to hide or make visible:
    - Email
    - Expiration Date
    - First Name
    - Last Name
    - Roles

Program Information

The following links are available to customize specific application information:

ERAS Institutional Contact Information

An application's status specifies where an application is in the application review, interview scheduling, and ranking process. The statuses display in the At-a-Glance Panel for each application.

1. Navigate to the Setup tab
    a. Note: Only users with ISU, AISU, PSU, and APSU roles in PDWS have access to view the Program Management tab in PDWS.
2. Select ERAS Institutional Contact Information to update institutional contact information.
3. Click Edit
    a. Note: This information is stored privately for access by ERAS staff only. Your data will not be shared with applicants. Primary and Secondary contacts are individual(s) designated by the DIO to fulfill ERAS responsibilities on the DIO's behalf.
4. Enter the appropriate information for your program's Primary and Secondary institutional contact. The Secondary contact is optional
    a. Primary Contact Fields: Prefix (Optional), First Name, Middle Name (Optional), Last Name, Suffix (Optional), E-mail, Phone, Extension (Optional), Fax (Optional), Address 1, Address 2 (Optional), City, State, Zip
    b. Secondary Contact Fields: Prefix, First Name, Middle Name (Optional), Last Name, Suffix (Optional), E-mail, Phone

Program Listing

1. Navigate to the Setup tab
    a. Note: Only users with ISU, AISU, PSU, and APSU roles in PDWS have access to view the Program Management tab in PDWS.
2. Select Program Listing to update your program's information in MyERAS.
3. Click Edit
    a. Note: This information will be displayed to applicants viewing your program's information in MyERAS.
4. Enter Program Director Information:
    a. First Name, Middle Name (Optional), Last Name, Suffix (Optional), Designation (Optional), E-mail

5. Enter Program Information:
    a. Address 1, Address 2 (Optional), Address 3 (Optional), City, State, Zip, Phone, Extension (Optional), Fax (Optional), E-mail, Website (Optional)
6. Add Social Media. Please note that the maximum number of social media accounts allowed is three
7. Are you an Osteopathic Recognized Program?
8. Add Program Requirements (Optional)
9. Add Program Information for Applicants (Optional)
    a. Note: We encourage you to provide additional information for applicants interested in applying to your program in the text box below. This information will be displayed within MyERAS for Applicants and will assist them in further understanding what your program values as part of the application process. The details you provide can include general program information, applicant requirements, application deadlines, description of patient populations, curricular/training opportunities, whether you offer dedicated time for research during residency, and/or any other unique opportunities available. If available, please also share career outcomes, such as top sub-specialty choices, job sector, and any related fellowship opportunities.
10. Click Save

ERAS Program Contact Information

1. Navigate to the Setup tab
    a. Note: Only users with ISU, AISU, PSU, and APSU roles in PDWS have access to view the Program Management tab in PDWS.
2. Click ERAS Program Contact Information
3. Click edit
    a. Note: This information is stored privately for access by ERAS staff only. Your data will not be shared with applicants.
4. Enter the appropriate information for your program's Primary and Secondary program contact. The Secondary contact is optional
    a. Primary Contact Fields: Prefix (Optional), First Name, Middle Name (Optional), Last Name, Suffix (Optional), E-mail, Phone, Extension (Optional), Fax (Optional), Address 1, Address 2 (Optional), City, State, Zip
    b. Secondary Contact Fields: Prefix, First Name, Middle Name (Optional), Last Name, Suffix (Optional), E-mail, Phone
5. Click Save

Applications

The following links are available to customize specific application information:

- Statuses
- Scores
- Attributes

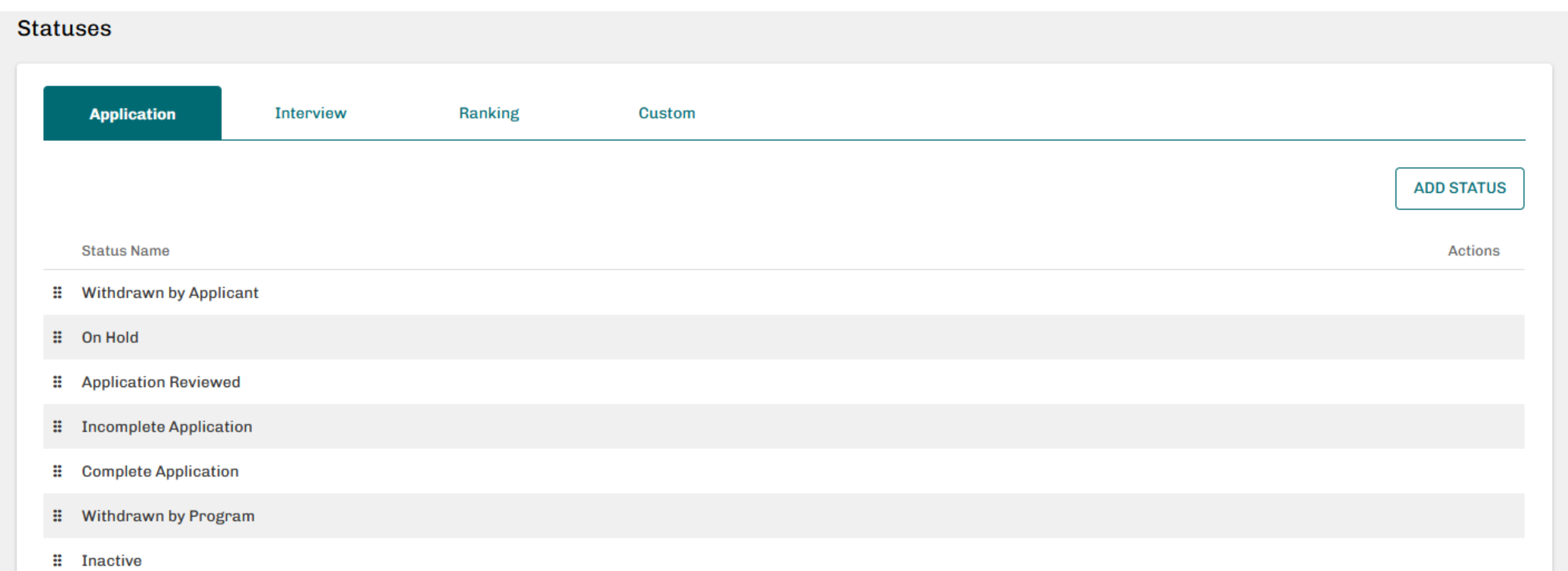
Statuses

An application's status specifies where an application is in the application review, interview scheduling, and ranking process. The statuses display in the At-a-Glance Panel for each application.

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 Coordinator 1s 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.



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:
    - Added to existing types (Application, Interview, Ranking) or created under Custom status.
    - Edited within the group.
    - Reordered
    - Renamed.
    - Deleted.
- Statuses cannot be deleted if:
    - The field has been given a value for at least one application.
    - The field has been saved in a filter.
    - The status is system-defined.

To Add a Status:

1. Click the **Add Status** button for the appropriate status type (Application, Interview, Ranking, Custom).
2. Type the status name.
3. Click Save.

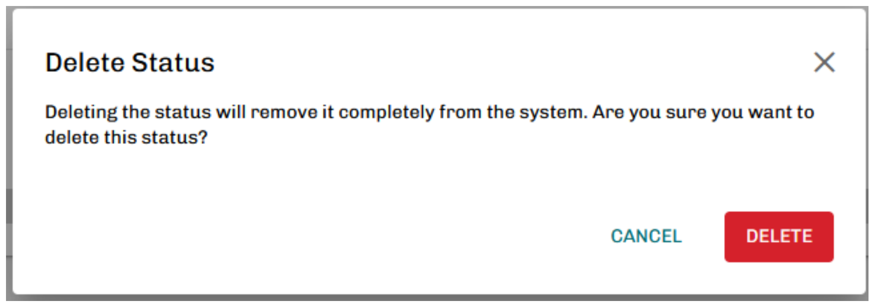
To Edit a Status:

1. Select the pencil icon.
2. Begin typing to rename the status.
3. Click Save.

- 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 **Drag and Drop** the status up or down within the list.
   - Both system and user-defined statuses may be reordered.
   - Reordering also appears in the **Status** tab of the Evaluate Application panel on the **Applications** tab.

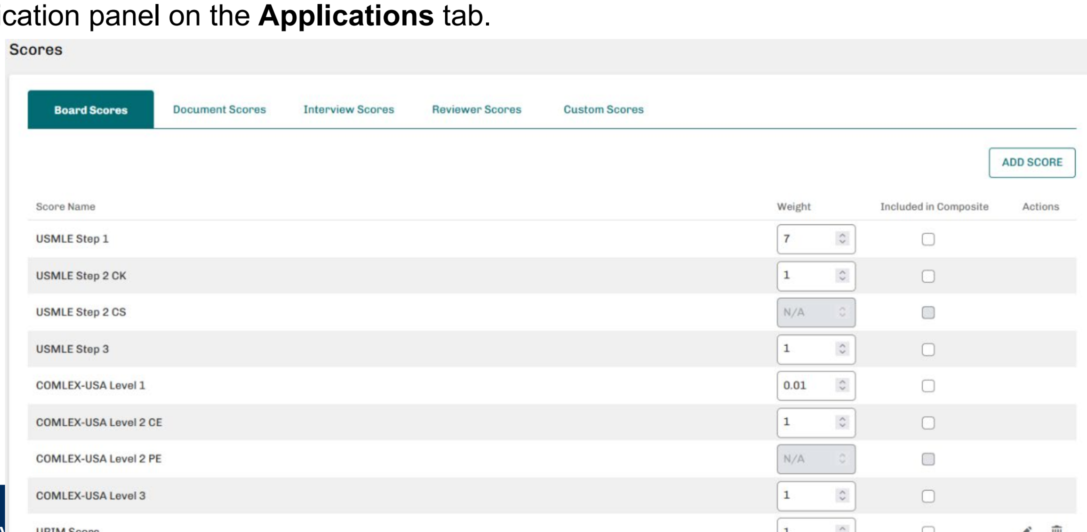


To Delete a Status:

1. Select the trash icon.
2. Click **Delete** 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.



Score Name	Weight	Included in Composite	Actions
USMLE Step 1	7		
USMLE Step 2 CK	1		
USMLE Step 2 CS	N/A		
USMLE Step 3	1		
COMLEX-USA Level 1	0.01		
COMLEX-USA Level 2 CE	1		
COMLEX-USA Level 2 PE	N/A		
COMLEX-USA Level 3	1		
URIM Score	1		

Notes:

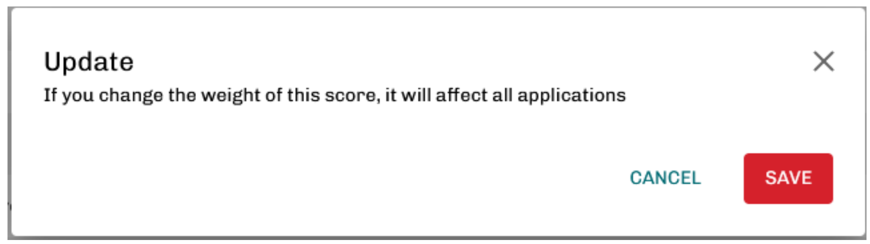
- Score names have a maximum of 25 characters.
- Up to 25 user-defined scores can be added.
- Weight and score ranges must be between 0.01 and 999.99.
- Scores can be:
    - Added/Created.
    - Edited.
    - Renamed.
    - Deleted.
- Scores cannot be deleted if:
    - The score has been given a value for at least one application.
    - The score has been used as part of a filter.
    - The score is system-defined.
    - 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.

To Add a Score:

1. In the appropriate score group (Board, Documents, Interview, Reviewer or Custom), click the **Add Score** button.
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 0.01 – 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.

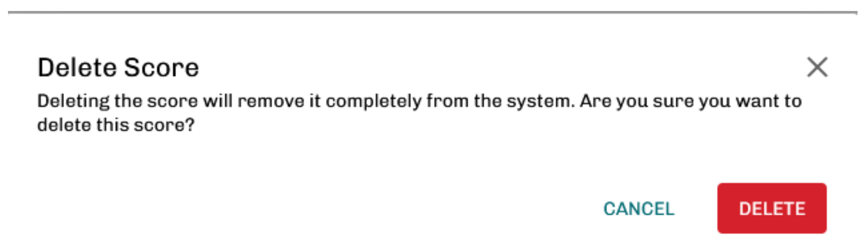
To Edit a Score or Change the Weight of a Score:

1. Select the appropriate score.
2. Click the default 1.00 weight.
3. Change the weight or inclusion of the status in the composite score. Weight scan range from 0.99 to 999.99. Users can manually enter a score or use the up and down arrows.
4. Click outside of the box.
5. Click the **Save** button.
    - System-defined score names cannot be edited.



To Delete a Score:

1. Select the **trash icon** under the Actions column.
2. Click the **Delete** button to confirm deletion.

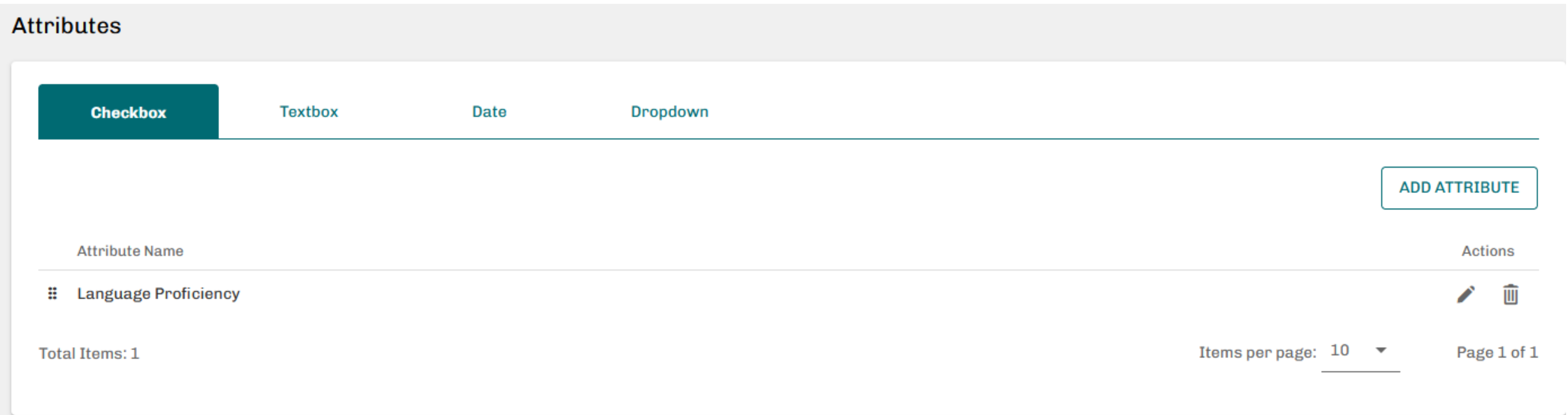


Scores cannot be deleted if:

- The score has been given a value for at least one application.
- The score has been used as part of a filter.
- 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 Coordinator1s can create Checkbox, Textbox, Date, or Drop-down attributes at any time throughout the season.



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 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.

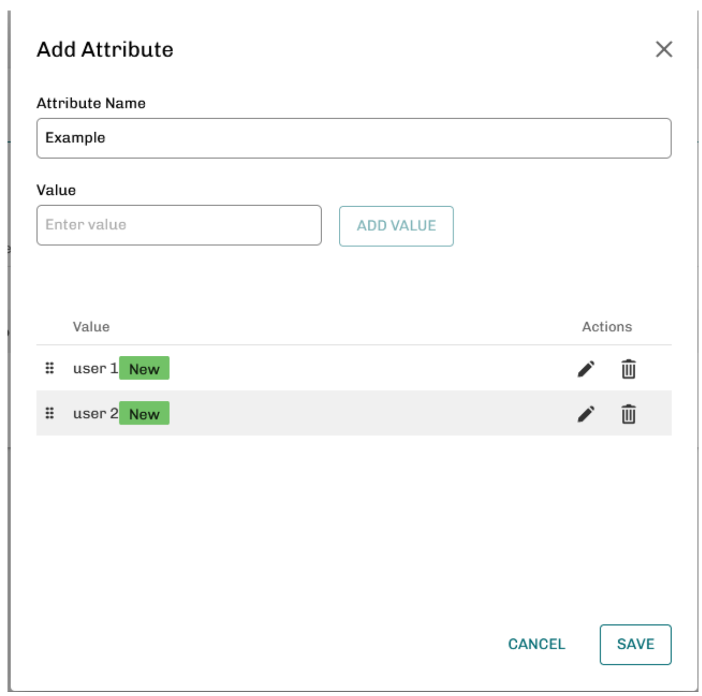
Manage Attributes

- 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 alphanumeric text).
  - Date (Entered via pop-up calendar).
  - Drop-down list (Can include up to 10 values).

- Attributes can be:
    - Added.
    - Edited.
    - ActivatedDeleted– 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 Attribute** 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 Attribute** button.
2. Enter the **Attribute Name**.
3. Enter each value that should appear in this drop-down.

- Click the **Edit** icon and enter the text you want to display in the drop-down list.
    - Use the **drag and drop feature** to change the order in which the drop-down values display in the list.
    - Use the **Trash** icon to delete a value.

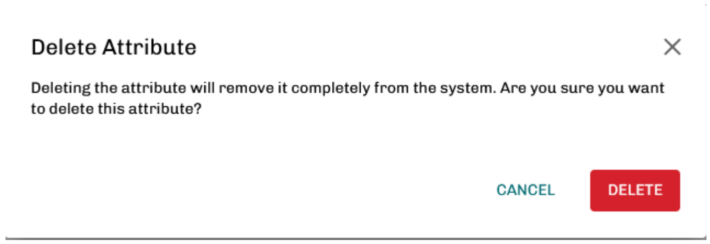
4. Click the **Save** button when finished.
    - All attributes are active by default.

To Modify an Attribute:

1. Select the **Pencil icon**.
2. Make the desired changes.
3. Click the **Save** button.

To Delete an Attribute:

1. Click the **Trash icon** next to the relevant attribute.
2. Click the **Delete** button to confirm deletion.
3. Attributes cannot be deleted if it is selected for at least one application or is referenced in at least one saved filter.



Setup History

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

- Status
- Scores
- Attributes
- Roles
- Screen Data
- Interviewer Tool

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. Bulk Print Requests | Link to EAM | History

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

- Print Job Name.
- Requested Date.
- Requested Time.
- 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 **Status** link of the print job. Print requests will be available for 48 hours.

Bulk Print Requests

REFRESH

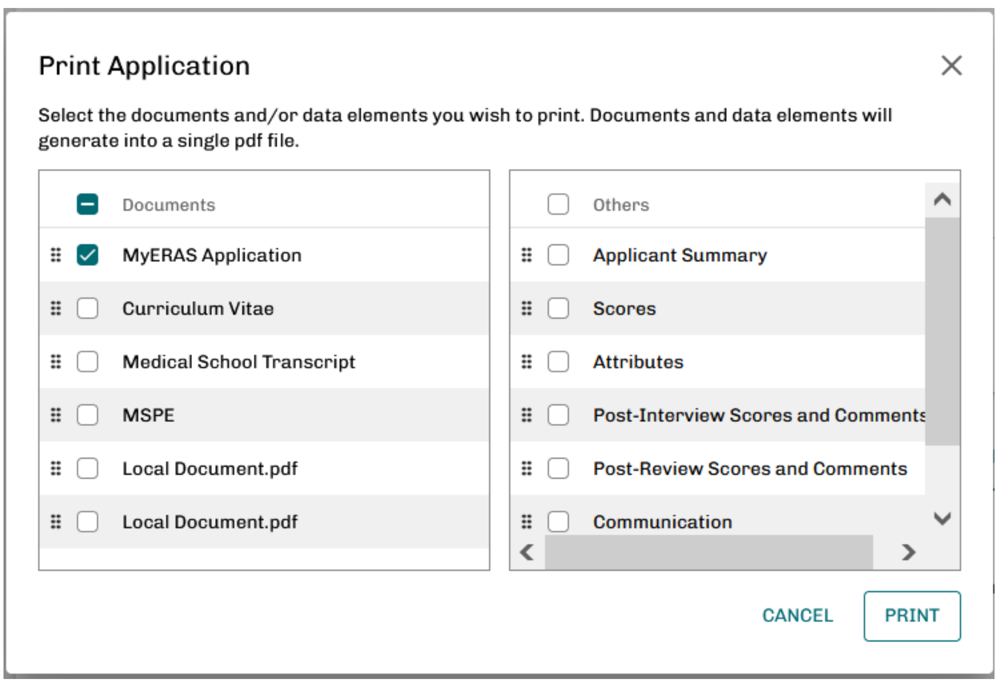
Print Job Name ↑	Requested Date ↓	Requested Time ↑	Status ↑
Applicants	Jun 07, 2023	1:28 PM ET	DOWNLOAD
Test Export	May 24, 2023	2:38 PM ET	DOWNLOAD
Test Export	May 24, 2023	12:31 PM ET	DOWNLOAD

Print Application(s)

The Print link, located from the Actions 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 be printed by using the **drag and drop** feature under Your Print Selection.



3. Click the **Print** 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.

Email	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's name.
To	The **To** field may be prepopulated, or names may be entered manually.
Subject	The **Subject** indicates the purpose of the communication.
Date	This is the **Date** of the phone communication. This date can be typed or selected from the date picker.
Body	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's 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.
Body	The message body can be a maximum of 8000 characters.
Upload File	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 the 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's 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 canbe typed or selected from the date picker.
Body	The comments can be a maximum of 8000 characters.
Upload File	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 the 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's 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.
Body	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 the 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 100 characters.
Sorted By	The default option is by last name.
Description of the filter	The description must be between 1 and 500 characters.

ERAS Program Management (EPM)

ERAS® registration runs from April through the end of May. To receive applications in the ERAS system, programs must register in ERAS Program Management to indicate that they will have open positions and will use the ERAS program. Use your AAMC username and password to log into EAM. The program management tab allows users to update their program's participation status and track information]

Update your Program's Participation Status

1. Navigate to the Program Management tab and select the appropriate
    a. Note: Only users with ISU, AISU, PSU, and APSU roles in PDWS have access to view the Program Management tab in PDWS.
2. Click the program name
3. Select the drop-down menu to view participation options
    a. The red arrow indicates the program's status. Programs that have not registered to participate in the current ERAS application season is marked as Unregistered.
4. Select Will have open positions and Will use ERAS to receive applications for the upcoming season.
    a. Please select the appropriate status if your program WILL NOT use ERAS or accept applications for the upcoming season.
5. After selecting a participation status, click Save. A confirmation message will appear once the status has been saved successfully
6. After saving, the program status will change to Participating and additional program information will appear.
7. Select the drop-down to Indicate if your program will opt in to use Thalamus for the upcoming season.
8. Specialties for September cycle programs participating in program signals have the option to indicate their participation status using the drop-down menu.
    a. Select Yes to receive program signals.
    b. Select No to opt out of receiving program signals this season.

Add Tracks Offered

1. Navigate to the Program Management tab and select the appropriate
    a. Note: Only users with ISU, AISU, PSU, and APSU roles in PDWS have access to view the Program Management tab in PDWS.
2. Click the program name
3. To add an additional track, click Add Additional Track
4. Enter the track information:
    a. Select a Training Type

b. Enter a track name
    1. Note: Track Name will be the Track Type by default. You may provide a descriptive name to help applicants distinguish between special types of training. For example, programs may use the Track Name field to label "Rural-based" or "Urban-based" tracks or even "Research" track names as appropriate.
c. Enter the NRMP Program Code (Optional)
    1. Note: If you have already registered your track with the NRMP, you may enter in the 9–11-character NRMP program code. It is not a required field.
d. Select Yes to display track information to applicants or select No.
    1. Choosing not to display a track will not allow applicants to apply to the track; but it will still show up in the Program Director’s Workstation (PDWS).
e. Click Save to save to add the track

Edit Tracks Offered

1. To edit existing track information:
    a. Click the pencil icon
    b. Edit the track information
    c. Click Update to save changes

Delete Tracks Offered

2. To delete an existing track:
    a. Click the trash Icon
    b. Click delete
        i. Note: You may delete a track ONLY if an applicant has not selected the track. Deleting a track will remove the track from MyERAS and the Program Director’s Workstation (PDWS). You may edit Track Name, NRMP Program Code or Display to Applicants at any time.

Contact ERAS Support

The ERAS Client Technical Support is available to assist programs with questions about the Program Director's Workstation (PDWS). The ERAS Client Technical Support 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