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# General

**Q: I logged in yesterday, and tried to move around the ERAS environment, but was not able to get into any functional section. Does this unlock after I've attended this web training?**
A: These modules will unlock on September 15th, when your applications are available

# Filters

**Q: How can I set up filter for all visa types except J1**
A: First, you have to determine if you are looking for the current or expected visa. Then, you would go to Manage Filters => Add a new filter. "Add group", then "Add New Criteria". For Category, select citizenship. For Field, select "current visa" and/or select "expected visa". Choose the condition equals, then go on to select your visa. You would need to add a criteria for each line by clicking "Add New Criteria"

**Q: Can you created a filter with the following criteria, summary sheet, application, personal statement, letters of recommendation, USMLE report, med school transcripts and CV?**
A: To create a filter to see if these documents are present. Your create filter would look like the screenshot below.

**Q: I want a listing of all applicants by medical school. How do I get the sort order?**
A: The easiest way to get this list is to click on the "All Applicants" filter under Manage Filters. Once you run the filter, then you will be taken to the View Current Results. Each applicant will have their medical school listed if you are a residency program. Click on the "Medical School of Graduation" to rank applicants alphabetically by medical school.

**Q: Is there still an "application activity" function?**
A: Yes, this functionality is on the dashboard.

**Q: Are we able to create a filter to pull scores for core classes i.e. Med Core, Surger, Psych, Peds, OB, Fam Med etc.?**
A: Unfortunately, this feature is not available. Please feel free to submit your suggestions to erasideas@aamc.org

**Q: I pulled my personal filters from the old ERAS version but how and when do I enter those?**
A: First, make sure that we have not yet created a default filter by going to Applications => Manage Filters to save you time. You can add to the default filters. You can also add a new filter from the Manage Filter screen. Proceed to "Add Group" and "Add New Criteria". You will be able to rebuild your filters.

**Q: Is there a System Defined Filter "Not Reviewed" Applicants?**
A: There is not a predefined filter for not reviewed, but you can create a new one like below.



**Q: Can we filter for applicants previously failing USMLE or COMLEX?**
A: A filter is not available, but an alert will appear on the application if the applicant had at least one

failed attempt. Please review the transcript when you see this alert



Q: Can you form a filter for home address, in particular the state?
A: Yes, you can filter the medical school state using the criteria selections below.



# Scheduling

**Q: Does the Scheduler tab only become available once we can review our applicants?**
A: The Scheduler tab will be available on September 15th for September-cycle programs.

**Q: On the interview day, i will need to know the set up.  If there are 4 separate interviewers, each needs a desk with a pc so the interviewers can gain file access?  otherwise, we are back to paper.**
A: That could be one setup or you can ask them to bring their laptops or notes.

**Q: Can we set up new times on schedule (i.e. 1:10, 1:20)? Yes, it works similarly to Outlook. You can choose a default set up time, but then type in the times you would like.**
A: Correct, even if you create default values, you can edit custom times.

**Q: How would you schedule group interviews?**
A: You would create a group interview by schedule as you would be ordinarily, but when you go to save you can add the rest of your interviewers. See below. (Also, see question **Q: How do we schedule an applicant to an interview date setup in the scheduler tool.)**

**Q: When you drag and drop an invited applicant to an active faculty on the scheduler tab, does that automatically assign the applicant to that faculty so the faculty will have access to their file?**
A: That's correct. If they have an interviewer role, then this will be how they gain access to the application.

**Q: Will you be able to print out an individual schedule for the applicant from the scheduler?**
A: Under the "Scheduled" tab in Scheduler, there is a report in the dropdown menu for an individual schedule called the "View/Print Schedule". It will appear similar to below.



**Q: Can the applicants schedule themselves for the interview after being invited?**
A: No, there is no self-scheduling component for ERAS 2015.

**Q: Is there a way to add other activities on the interview day?  We have an overview with the PD, tours, lunch, etc.**
A: No, but please feel free to add this to the text in your email inviting the applicant to an interview.

**Q: Is there a way to schedule an applicant without having to assign an interviewer?**
A: Yes, you would just place them in the Unassigned column so that you know they are scheduled for that day but not with a specific interviewer.

**Q: How do you set up if all of your interviewers are interviewing the applicants?**
A: If they are scheduled at different times, then you can use the scheduling module to ensure that there is no conflicts in the schedule.

**Q: When inviting can you invite for specific dates only?**
A: Yes, there is no self-scheduling component, so you can add your desired date(s) in the message to the applicant.

**Q: How do you move the invited applicants to schedule in the Scheduler tab?**
A: You move them to the Scheduled tab by scheduling them. (Also, see question **Q: How do we schedule an applicant to an interview date setup in the scheduler tool.)**

**Q: Is there a way to block late interview dates to early applicants, or do we need to open up days later in the season?**
A: Yes, there is no self-scheduling component, so you can add your desired date(s) in the message to the applicant.

**Q: If we offer second interview dates for candidates, could we use the same Interview Invitation/Scheduler module or is this not advised?**
A: Absolutely, it would be available for second interview scheduling. The ERAS does not close until May 30, 2015.

**Q: We schedule different days of the week during different time frames - i.e. - Wednesday afternoon and Thursday morning. How can I have both?**
A: You will simply select your dates in setup and the time frame that you need the interviews to run for and once in the Scheduler module, you will view all the dates that you selected. Also, you can manually change any time of the interview, even if it is different from your default.

**Q: Are the applicants able to see the schedules that you create?**
A: No, applicants cannot see anything that programs enter in the PDWS, except, of course, messages that you manually send them.

**Q: When we are creating the interview scheduler can we create our own time blocks and start times?**
A: Yes, you can create a time block and start time in "Scheduler Tool" in Setup.

# User Management/Access

**Q: Where do you find the privileges for each role assignment, ie interviewer 1, 2, 3, reviewer 1, 2, 3, etc?**
**A:** Here is a helpful chart https://www.aamc.org/services/eras/programs/web-based/386578/roleschart.html

**Q: Can multiple persons be selected as superusers?**
A: There can only be one program super user. By default, the program director is given that role. However, there is not a limit for users that can have the alternate program super user role.

**Q: Can a reviewer be assigned to view All Applicants?**
A: Yes, you would run a filter on "all applicants" then perform a bulk action and assign all applicants to that reviewer.

**Q: Can you assign a faculty to both a reviewer and interviewer?**
A: Yes, you can. However, at this time, if they have both roles, they will need to be assigned all applicants. If they have scheduled applicants, they will not be able to view these unless they are assigned (in Applications module).

**Q: Can the PD give Program Coordinators super-user access?**
A: Yes, the PD would go to the Assign Roles in Setup, then select coordinator and apply the Alternate Program Super User.

**Q: Does the DIO have to invite all other faculty interviewers or can we do that?**
A: Programs can invite other users to their program.

**Q: Does each user, regardless of status, need an individual account w AAMC to log into ERAS**
A: Yes, each user needs her or her own account.

**Q: What is the difference between the super user and the alternate super user?**
A: The program super user and the alternate program super user share identical privileges.

**Q: Can you have more than one PD Super User per program?**
A: No, you can only have one program super user per program, but you can have an unlimited number of alternate program super users

**Q: Must a faculty member be assigned to a candidate in order to view applications?  How can a faculty member review all applications to help the PD with the reviewing process?**
A: If a faculty member has a Reviewer role (Reviewer 1, Reviewer 2, Reviewer 3), then they have to be assigned applications to be viewable. If they have the role of alternate program super user, then they can view all applications without having to be assigned.

**Q: You noted that the Program can changes one's role by using the "Assign Roles" link.  As an Institution, may I do the same?  Previously, I had to revoke a person's role, and start all over by create a new invite with the new role.**
A: Yes, as the institution super user, then you change privileges by going to assign. The user, however, would need to have created an AAMC account and logged into the PDWS.

**Q: How long does it take for an interviewer's profile to expire?**
A: I assume that you are referring to the invitation. The invitation expires after 14 days.

**Q: I don't any longer have the invitation e-mail.  What is the URL to use to log in?**
A: I assume that you had been able to log in previously, so here is the PDWS url.
https://services.aamc.org/30/eras-pdws-web/.

**Q: Please clarify whether or not the coordinator can manage/create data filters.**
A: A coordinator who has the Coordinator 1 role will not be able to manage/create data filters. A coordinator with the Alternate Program Super User role will be able to manage/create data filters.

**Q: How do we schedule an applicant to an interview date setup in the scheduler tool.**
A: First you have to make sure that you have selected dates in the Setup Module. Under Scheduler Tool, select the calendar to select interview dates.

Then you select the applicant as "Selected to Interview". Continued on next page.



Then, in the Scheduler module, select your applicants under the "Selected" tab to the right. You can invite the applicant directly from Scheduler or manually "move to invited". If you move to invited, then that means you are inviting the applicant outside of the PDWS.

**Option 1:** To schedule unassigned (meaning no interviewer known), left click and hold on a name under Invited, then move to "Unassigned" column by releasing your mouse.

**Option 2:** To schedule unassigned, left click and hold on a name under Invited, then move to an interviewer at a specific time by releasing your mouse.

**Option 3:** Double click on applicant, then "Add Scheduled Event". You can schedule, unassign, or waitlist from this window.

**Option 4:** To waitlist, left click and hold on a name under Invited, then move to a date on the waitlist. This feature only works if you already have someone on the waitlist.

**Q: Do you have to use the scheduler feature?**
A: No, you do not have to use the Scheduler.

**Q: Can multiple faculty or residents be set up as "interviewer 1" or reviewer 1?**
A: Yes, there is no limit to the number of users that you can assign as interviewer 1 or reviewer 1

# Applications/Printing/Exporting

**Q: Can the applicant tell status of their application by what we click on? Example.. on hold, reviewing, etc.**
A: No, applicants cannot see any information that programs enter in the PDWS.

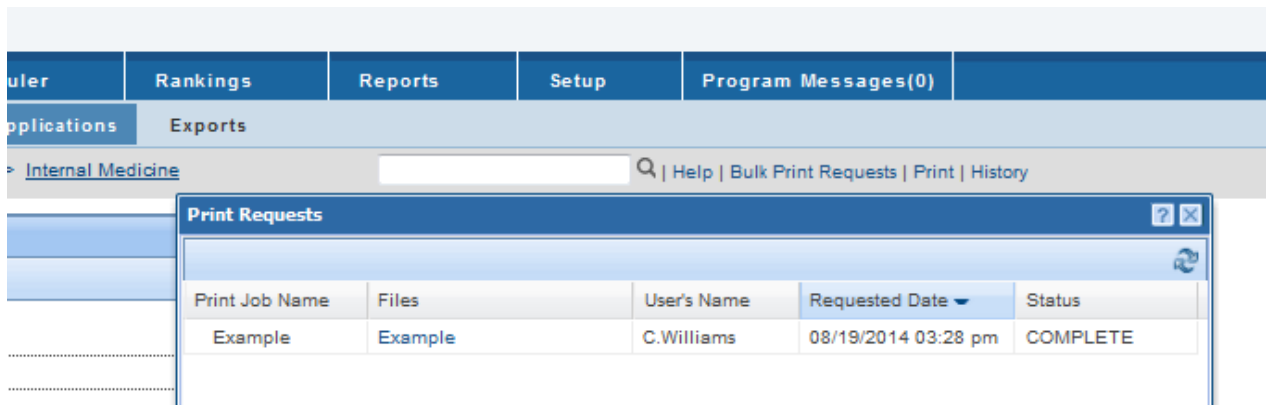**Q: Can we still export the applications to PDFs?**
A: Yes, run your filter and you will be taken under "View Current Results". Click on "View/Print Application" at the bottom right, then click "Go"



Select all of your documents in the window, provide a name, then request print. When your print job is finished, it will appear under Bulk Prints on the grey bar and show as completed.

**Q: Where do program directors select the status of each applicant (i.e. reviewed, invite to interview, etc.)**
A: If they need to modify a status, then they will simply select the edit button in the application header.
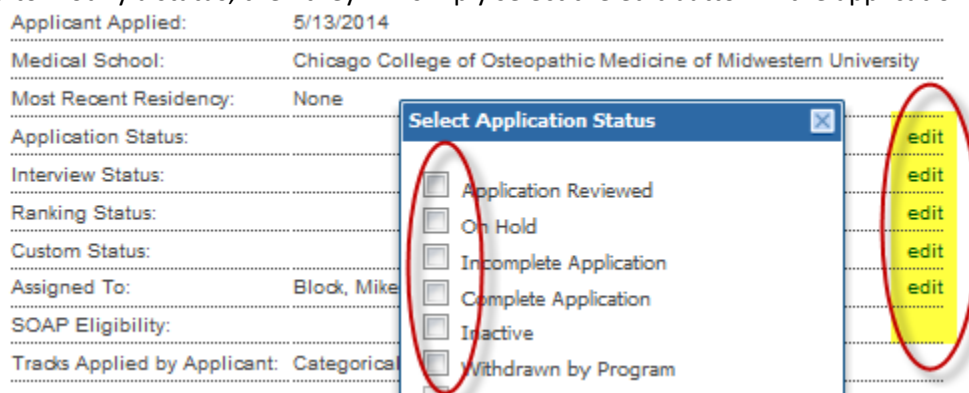


**Q: So if we wanted to use ERAS for review of applications by committee members and they inputted scores, etc. The applicant will never be able to see this. We need it to be completely confidential.**
A: Applicants cannot view anything that program put in the PDWS.

**Q: When you export data from PDWS, what happens to it? Does it go to our desktop?**
A: Some browsers will automatically save to a specific folder. Others will ask you to select folder. Firefox users can go to Tools=>Options=>Downloads to determine location. Internet Explorer users can go to Tools=>View Downloads.

**Q: Are LORs identified if the applicant did not waive the right to view the letter?**
A: Yes, if the applicant waived the right to view a letter, then will be marked on the application. The author of the letter may also mention in the text.

**Q: Can you assign the filtered applications to the reviewers in bulk from the "View Current Results" screen?**
A: Yes, choose the bulk action, "Assign Applicants", then click go. To assign, select radio button for faculty under the "Check" column.

**Q: How do you "change record" on more than 1 application?**
A: We call that a bulk action in the new system. Run the filter and you will be taken to "View Current Results". Scroll down to the bottom of the page, then select the dropdown menu to access all bulk

actions to perform on one applicant.
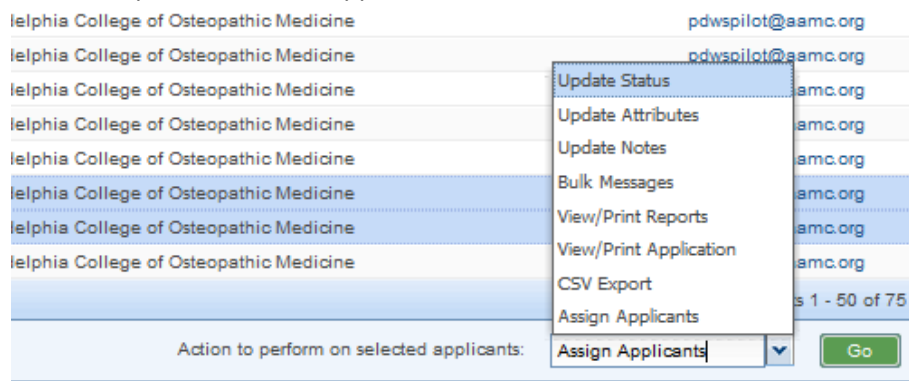


## Q: How do we define what a complete application is?

A: That's up to your program. ERAS simply provides a status that you can check after reviewing.

## Q: Do your reports export into excel.  If yes, can you demonstrate?

A: To export: Go to Applications=> Exports. This functionality will not be available for September-cycle programs until Sept 15th. Select export criteria from the "Type of data to export". All available fields will populate below. Use right-pointing arrow to move over. Provide a CSV name and "Save and Run". Your job will appear in Bulk Print Requests.
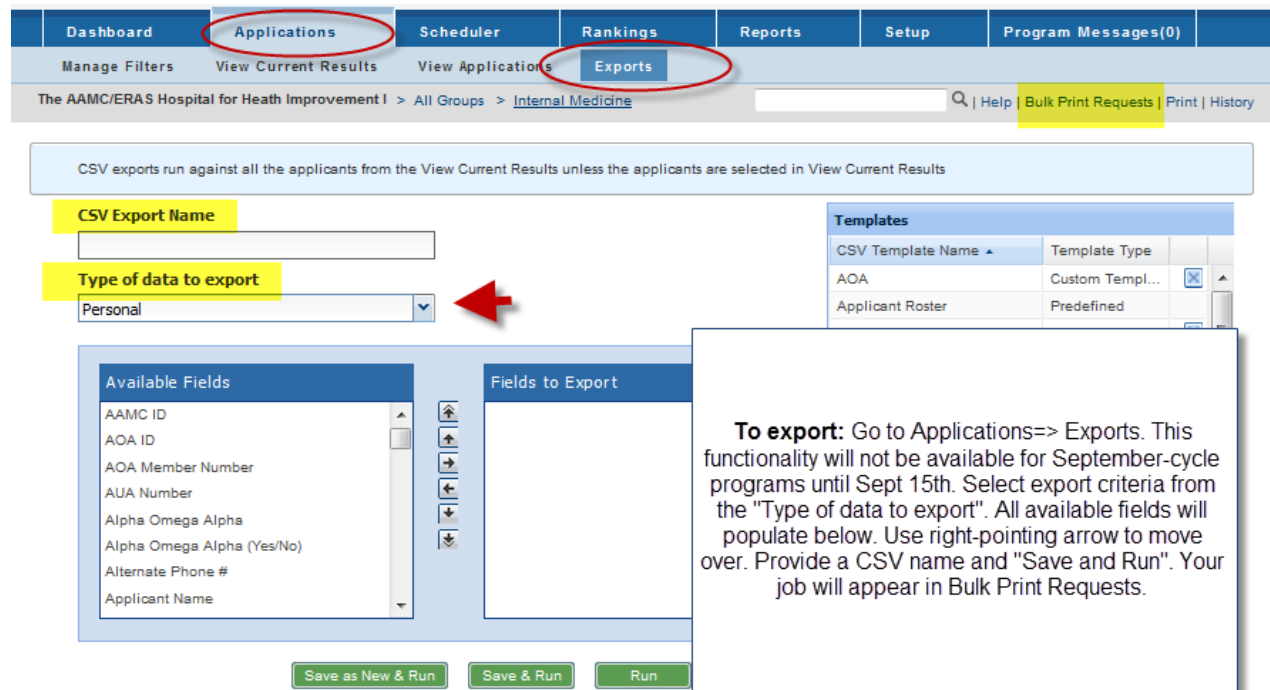


# Setup

## Q: How do we add custom fields to all applications that come in?

A: You can add custom statuses under Statuses in the Setup Module. Simply click on "Add"

# Accessibility

**Q: Is there a tablet option?**
A: You may be able to access the PDWS from your tablet browser, but tablet devices are not support at this time.

# Ranking

**Q: So if we come up with a composite interview score, will program help with our ROL?**
A: Yes, you will be able to rank by composite score if you use the composite score functionality.

# Printing

**Q: How to do bulk printing of docs of selected applicants in a certain group of criteria**
A: Yes, run your filter and you will be taken under "View Current Results". Click on "View/Print Application" at the bottom right, then click "Go"
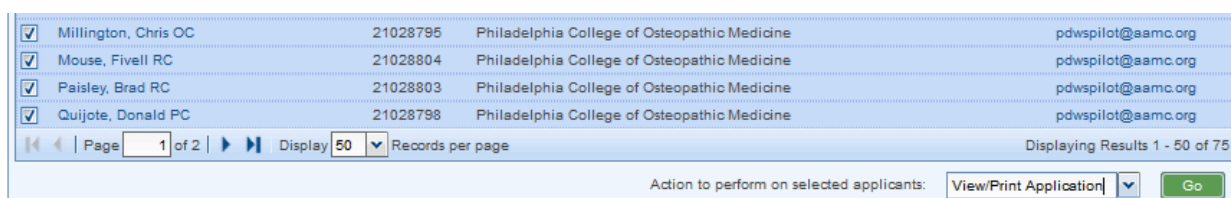


Select all of your documents in the window, provide a name, then request print. When your print job is finished, it will appear under Bulk Prints on the grey bar and show as completed.
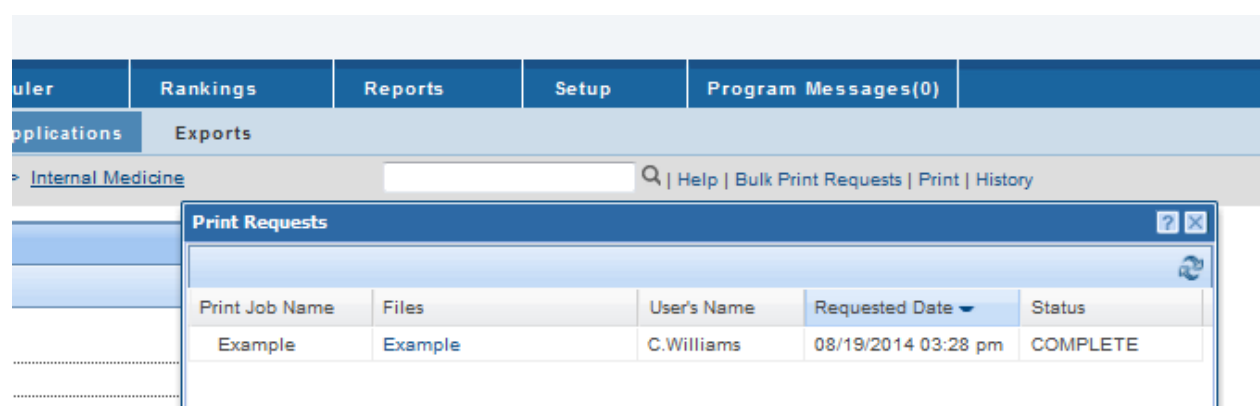


# Help/Learning Resources

Q: Is there a detailed user manual?
A: https://www.aamc.org/download/386070/data/webuserguide.pdf

# Messaging

**Q: Can we add attachments to our applicant emails?**

A: Yes, you can add a pdf attachment less than 5MB.

**Q: Can you go over the program messages? Are we still able to send interview invites through ERAS?**

A: Program Messages will be active for September-cycle programs on Sept 15th. This module is similar to your messaging system. You can email applicants and they can email you back through system. You can compose, save drafts, sort messages into folders, and store sent messages.
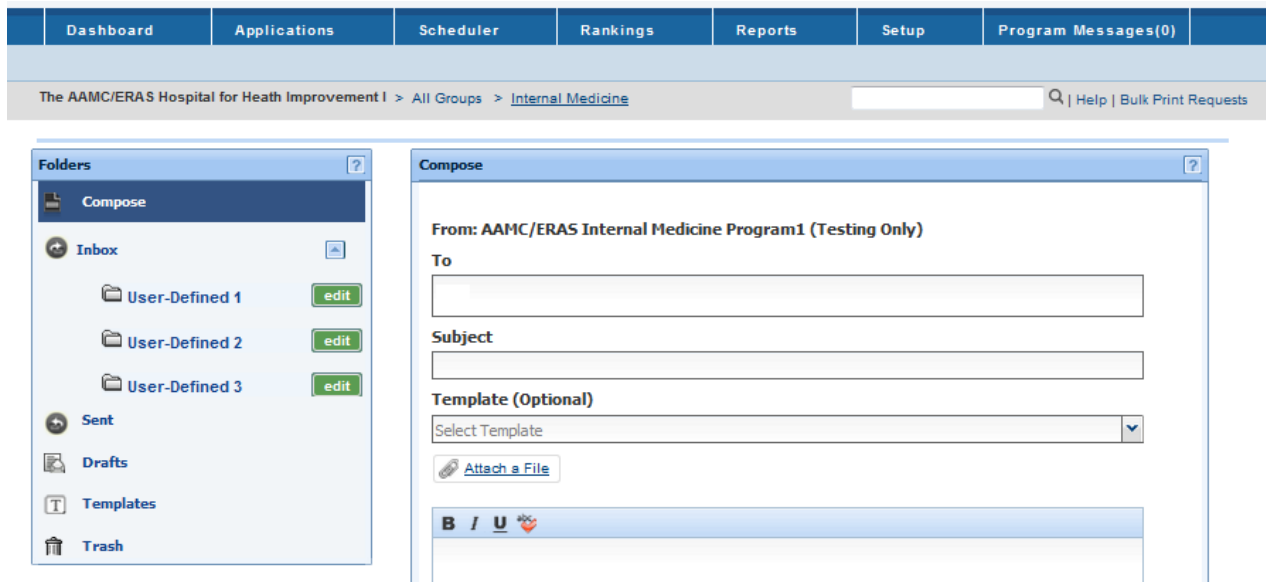


# Navigation

**Q: Since I'm responsible for more than one program, can I switch between program without logging out as in the desktop version?**

A: Yes, you can use the navigation highlighted below to toggle between programs.