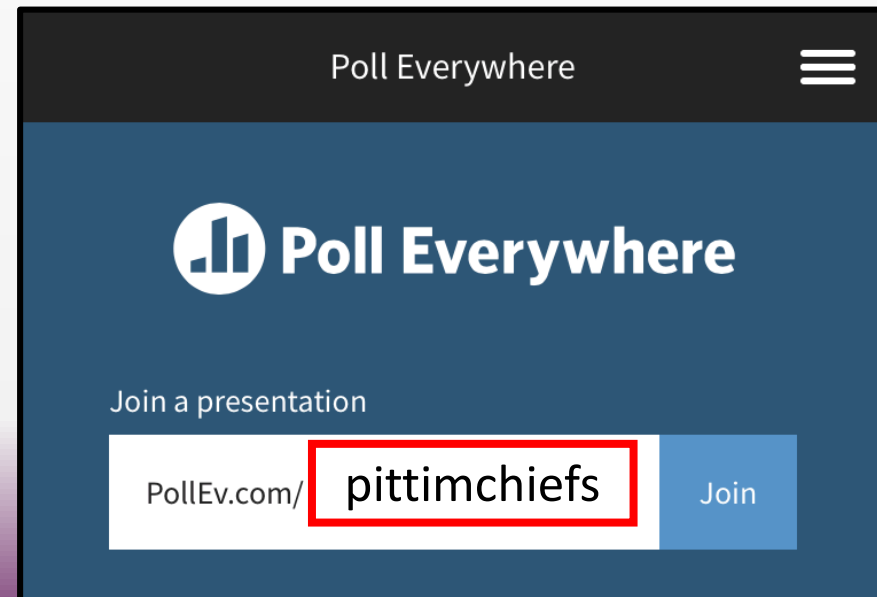


# This talk uses



- Step 1: Download the Poll Everywhere app
- Step 2: Enter username “pittimchiefs”
- Step 3: Click Join

Alternatively you can  
**participate online** by going  
to **pollev.com/pittimchiefs**



**Lauren Petty**  
**Haylee Shacklock**  
**Jennifer Corbelli, MD**

# **ERAS**

LIKE A

# **CHAMPION**

How to Use ERAS Attributes and Filters to  
Manage Your Recruitment Season and Sanity

# University of Pittsburgh Medical Center (UPMC) Internal Medicine Residency

Background

Statistics

Objectives/Take-aways

Attributes

Filters

Excel

Questions specific to Attributes and/or Filters

Group Questions on ERAS outside of Attributes and/or Filters **(if we have time)**

# Background

- Transitioned from desktop PDWS ERAS to web-based in 2015
- New PD in 2016 – recruitment season 2017-2018
- Why we needed attributes/filters to communicate
- Stats – apps/invites/interviews

# The numbers

- 156 total residents
- Recruit 60 Intern year spots (52 CAT, 8 Prelim)
- Received 4576 ERAS applications
- Invited 468 CAT applicants
  - 7 Tracks – Clinical Scientist Track, Generalist, Geriatrics, Global Health, International Scholars, Research Pathway, Women's Health
- Interviewed 364

# Take-aways

- Attributes – What are they? How to create them. And how to use them to communicate.
- Filters – Features. How to build Filters using your Attributes. Exporting data from Filters in ERAS.
- Excel – Using the data from your ERAS export efficiently.

# What is an attribute?

## ERAS definition:

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, and Program Coordinator 1 in Setup, it is viewed in the Attributes tab.

## Simple definition:

Can be used to filter out additional information from applications aside from actual Filters and as a form of communication between PDs/coordinators/etc.

The screenshot shows the 'Attributes' tab in the ERAS system. At the top, there are tabs for 'Status', 'Interviews', 'Reviewers', 'Communication', 'Attributes' (selected), 'Notes', and 'Scores'. Below the tabs is a section titled 'Qualifying Experience' with the text 'No Medical Experience Reported.' Underneath is a section titled 'Other Attributes' containing a list of checkboxes. The 'Added to RANC' checkbox is checked, while all other checkboxes are unchecked.

Attribute	Status
Called or Emailed	<input type="checkbox"/>
On Hold per JC	<input type="checkbox"/>
Added to RANC	<input checked="" type="checkbox"/>
IST invite per JC	<input type="checkbox"/>
IST Invited	<input type="checkbox"/>
MD PhD - RP	<input type="checkbox"/>
RP invite per JC	<input type="checkbox"/>
invite per Jessica - RP	<input type="checkbox"/>
GH	<input type="checkbox"/>
GH invite per JC	<input type="checkbox"/>
Couples Matching	<input type="checkbox"/>
On our Radar	<input type="checkbox"/>
CAT invite per JC	<input type="checkbox"/>
CST	<input type="checkbox"/>
Generalist	<input type="checkbox"/>
Geriatrics	<input type="checkbox"/>
DO	<input type="checkbox"/>
DO invite per TG	<input type="checkbox"/>
PrelimTY-PITT Invited	<input type="checkbox"/>
Prelim invite per JC	<input type="checkbox"/>

# How can you use an attribute to communicate?

Suggestions for the PD to review:

- On holds or wait listed
- Cancellations
- Tracks
- Couples match invited or not yet invited
- Those who call and are “very interested” in your program
- The “my mother’s 3<sup>rd</sup> cousin is the Chair of Medicine Department at XYZ”



# 4 Types of Attributes:

- Checkbox – most helpful/easiest
- Textbox
- Date
- Dropdown

# Creating an Attribute – Step by Step Guide

1. Click on Setup
2. Under Applications Heading
  - a. Click on Attributes
3. Click Add button at the bottom of Checkbox Attributes box
  - a. Create New Attribute-Checkbox dialogue box pops up
  - b. You must Enter an Attribute Name
4. Save
5. You can then change the order of your attributes, activate, and deactivate

[Dashboard](#)[Applications](#)[Scheduler](#)[Rankings](#)[Reports](#)[Archives](#)[Setup](#)

Due to scheduled maintenance, PDWS will be unavailable Wednesday, Feb 28<sup>th</sup> from 5:00AM through Wednesday, Feb 28<sup>th</sup> 7:00AM ET.  
Our apologies for any inconvenience this may cause.

[Univ of Pittsburgh Medical Center Medical Education](#) > [All Groups](#) > [Internal Medicine](#) [Help](#) | [Bulk Print Requests](#) | [History](#)**Dashboard**[Data Filter](#)[Reports](#)[RMS Selection](#)**Applications**[Statuses](#)[Scores](#)[Attributes](#)**Scheduler**[Interviewer Tool](#)**Users**[Manage Users](#)[Pre-Verified Users](#)[My Role](#)**Rankings**[Comparison Tool](#)**Checkbox**☐ Called or Emailed☐ On Hold per JC☐ Added to RANC☐ IST invite per JC☐ IST Invited☐ MD PhD - RP☐ RP invite per JC☐ invite per Jessica - RP☐ GH☐ GH invite per JC☐ Couples Matching☐ On our Radar☐ CAT invite per JC☐ CST☐ Generalist☐ Geriatrics☐ DO☐ DO invite per TG☐ PrelimTY-PITT Invited☐ Prelim invite per JC

Dashboard

Applications

Scheduler

Rankings

Reports

Archives

Setup

Program Messages(0)

Dashboard

Data Filter

Reports

RMS Selection

Applications

Statuses

Scores

Attributes

Scheduler

Interviewer Tool

Users

Manage Users

Pre-Verified Users

My Role

Rankings

Comparison Tool

Checkbox

Called or Emailed		
On Hold per JC		
Added to RANC		
IST invite per JC		
IST Invited		
MD PhD - RP		
RP invite per JC		
invite per Jessica - RP		
GH		
GH invite per JC		
Couples Matching		
On our Radar		

Create New Attribute - Checkbox

Attribute Name:

Called or Emailed

Save

Cancel

Prelim PHD invited		
Prelim invite per JC		

Move Up

Move Down

Add

Activate

Deactivate

# Using Attributes

OR

Electronic Residency Application Service

AAMC.ORG MY ACCOUNT MESSAGE CENTER (0) SIGN OUT

ERAS AAMC

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

View Current Results View Applications Exports

Univ of Pittsburgh Medical Center Medical Education > All Groups > Internal Medicine

Help | Bulk Print Requests | Active Applicants | History

Modify Filter Criteria

Results (Called or Emailed - Not Yet Invited or Selected for Invite last executed Tue Feb 27 12:49:03 EST 2018)

Refine Results enter value Refine Sort By

Page 1 of 2 Select Page Select All Display 100 Records per page Displaying Results 1 - 100 of 133

Applicant Name	AAMC ID	Most Recent Medical School	E-mail Address
<input type="checkbox"/> <a href="#">Doe, Jane</a>		Saint Louis University School of Medicine	
<input type="checkbox"/>		Medical College of Georgia at Augusta University	
<input type="checkbox"/>		Indiana University School of Medicine	
<input type="checkbox"/>		Tehran University of Medical Sciences School of Medicine	
<input type="checkbox"/>		University of Medicine and Health Sciences, St. Kitts	
<input type="checkbox"/>		Ohio State University College of Medicine	
<input type="checkbox"/>		Eastern Virginia Medical School	
<input type="checkbox"/>		Icahn School of Medicine at Mount Sinai	
<input type="checkbox"/>		McGovern Medical School at the University of Texas Health Science Center at Hou...	
<input type="checkbox"/>		New York Institute of Technology College of Osteopathic Medicine	
<input type="checkbox"/>		The University of Toledo College of Medicine	
<input type="checkbox"/>		Nova Southeastern University College of Osteopathic Medicine	
<input type="checkbox"/>		Universidad Peruana Cayetano Heredia Facultad de Medicina Alberto Hurtado	
<input type="checkbox"/>		University of California, Davis, School of Medicine	
<input type="checkbox"/>		University of Louisville School of Medicine	
<input type="checkbox"/>		Wright State University Boonshoft School of Medicine	
<input type="checkbox"/>		Universidad de Los Andes (Venezuela) Facultad de Medicina	
<input type="checkbox"/>		University of Kansas School of Medicine-Wichita	
<input type="checkbox"/>		St. George's University School of Medicine	
<input type="checkbox"/>		University of Rochester School of Medicine and Dentistry	
<input type="checkbox"/>		Faculté de Médecine Pierre et Marie Curie	
<input type="checkbox"/>		Tulane University School of Medicine	

Applicant Names are Listed Here. Clicking on the name will open their ERAS application

# Using Attributes

Attributes are found in a candidate's application

- View Applications – from a Filter (View Current Results)  
Candidate's Name is a hyperlink
- Magnifying Glass – Look up a specific candidate

1. Click on Attributes tab
2. Simply place a “✓” in the box next to the appropriate Attribute

The screenshot displays the ERAS AAMC application interface. At the top, there's a navigation bar with links like AAMC.ORG, MY ACCOUNT, MESSAGE CENTER (0), and SIGN OUT. Below this is a menu with tabs: Dashboard, Applications, Scheduler, Rankings, Reports, Archives, Setup, and Program Messages(0). The 'Applications' tab is active, showing 'View Applications' and 'Exports' options. A yellow banner indicates scheduled maintenance for PDWS on Wednesday, Feb 28th. The main content area shows the candidate profile for Jane Doe, including her application details, assignment information, education, and tracks. A black arrow points from the 'Attributes' tab in the 'Other Attributes' section to the 'Attributes' tab in the 'Qualifying Experience' section. The 'Attributes' tab is selected, showing a list of attributes with checkboxes. The 'Called or Emailed' attribute is checked, and a bracket groups it with other attributes like 'On Hold per JC', 'Added to RANC', 'IST invite per JC', 'IST Invited', 'MD PhD - RP', 'RP invite per JC', 'invite per Jessica -', and 'GH'.

Electronic Residency Application Service  
ERAS AAMC

AAMC.ORG MY ACCOUNT MESSAGE CENTER (0) SIGN OUT

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

Manage Filters View Current Results View Applications Exports

Due to scheduled maintenance, PDWS will be unavailable Wednesday, Feb 28<sup>th</sup> from 5:00AM through Wednesday, Feb 28<sup>th</sup> 7:00AM ET. Our apologies for any inconvenience this may cause.

Univ of Pittsburgh Medical Center Medical Education> All Groups > Internal Medicine

Called or Emailed - Not Yet Invited or Selected for Invite last executed Tue Feb 27 12:49:03 EST 2018 Applicant 1 of 133 Back to Results Next

**Doe, Jane**

Application  
AAMC ID: Applicant Applied: 9/15/2017  
e-mail:  
Preferred Name: Preferred Phone:

Assignment Information  
Assigned To: edit

Education  
Most Recent Medical School: Saint Louis University School of Medicine  
Most Recent Residency: None

Track(s)  
Tracks Applied by Applicant:  
Internal Medicine|1652140C0 (Categorical)  
Tracks Considered by Program: edit  
Internal Medicine|1652140C0 (Categorical)  
PGY2 Interest:

Documents

Name	Date
MyERAS Application	09/15/2017
Curriculum Vitae	09/15/2017
Medical School Transcript	09/15/2017
MSPE	09/26/2017
Personal Statement	09/15/2017

Add Local Document

Personal Education Experience Publications Exams/Licenses

**Personal Information**

Gender	Female
Self-Identification	No Answer
Birth date	Screened

**Current Address**

Street	
City	
State	
Zip	
Country	

**Citizenship and Visa Information**

Birthplace	Screened
Citizenship	Screened

**Permanent Address**

Street	
City	
State	
Zip	
Country	

**Match Information**

Status Interviews Reviewers Communication

Attributes Notes Scores

**Qualifying Experience**

No Medical Experience Reported.

**Other Attributes**

- ☒ Called or Emailed
- ☐ On Hold per JC
- ☐ Added to RANC
- ☐ IST invite per JC
- ☐ IST Invited
- ☐ MD PhD - RP
- ☐ RP invite per JC
- ☐ invite per Jessica -
- ☐ GH



Write down a few ideas that popped into your mind for potential attributes you could use for your own program(s).



**What is one attribute that you plan to use for your program?**



# What is a Filter?

- Definition:

A tool designed to view applicants that meet specified criteria based on information in an ERAS application.

The Filters screen is divided into 3 or 4 sections:

- Favorites
- User-Defined
- System-Defined
- SOAP System-Defined (only Allopathic Residency programs)

Add a new filter

**Favorites (36)**

- |  |   |
|--|---|
| ★ Active Applicants  | ★ Called or Emailed - AOA or Gold or URM                |
| ★ Called or Emailed - Not Yet Invited or Selected for Invite | ★ CAT- Selected but not yet Invited for Interview - LMP |
| ★ GH - Invited - LMP   | ★ GH - Scheduled - LMP                                  |

**SOAP System-Defined (19)**

- |  |  |
|--|--|
| ★ SOAP Applicant   | ★ SOAP Applicant Medical Degree Date of Graduation Less than 5 Years |
| ★ SOAP D.O Graduates   | ★ SOAP Eligibility Advanced  |
| ★ SOAP Eligibility Categorical                                   | ★ SOAP Eligibility Preliminary                                       |
| ★ SOAP Eligibility Primary Care                                  | ★ SOAP Eligibility Reserved for Physician Only                       |
| ★ SOAP Foreign Graduates   | ★ SOAP Foreign Graduates with US Citizenship                         |
| ★ SOAP Fully Matched Applicants                                  | ★ SOAP Fully Unmatched Applicants                                    |
| ★ SOAP Partially Matched Applicants                              | ★ SOAP Partially Matched Applicants and Eligible for Advanced        |
| ★ SOAP Partially Matched Applicants and Eligible for Preliminary | ★ SOAP Reapply Applicant   |
| ★ SOAP Track Applied by Applicant                                | ★ SOAP US Graduates  |
| ★ SOAP US/Canadian Graduates                                     |  |

**User-Defined (69)**

- |  |     |   |     |
|--|-----|---|-----|
| ★ RP Scheduled - LMP                           | ✎ ✖ | ★ Schedule Start Date                         | ✎ ✖ |
| ★ start date                                   | ✎ ✖ | ★ STATS - CAT - Total Interviewed - LMP       | ✎ ✖ |
| ★ STATS - CAT - Total Invited - LMP            | ✎ ✖ | ★ STATS - CAT - Total Scheduled - LMP         | ✎ ✖ |
| ★ STATS - CAT WITH AOA - TOTAL SCHEDULED - LMP | ✎ ✖ | ★ STATS - TOTAL APPLICANTS WITH PRELIMS - LMP | ✎ ✖ |
| ★ STATS - TOTAL CAT APPLICANTS - LMP           | ✎ ✖ | ★ STATS - TOTAL CAT US GRADS - LMP            | ✎ ✖ |

**System-Defined (56)**

- |                                       |                                  |
|---------------------------------------|----------------------------------|
| ★ 2 LoRs and COMLEX-USA Transcript    | ★ 2 LoRs and USMLE Transcript    |
| ★ 3 LoRs and COMLEX-USA Transcript    | ★ 3 LoRs and USMLE Transcript    |
| ★ 3 LoRs Missing                      | ★ 3 LoRs Received                |
| ★ 3 LoRs, MSPE, COMLEX-USA Transcript | ★ 3 LoRs, MSPE, USMLE Transcript |
| ★ Active Applicants                   | ★ All Applicants                 |

# Creating a Filter – Step by Step Guide

## Called or Emailed Filter

1. Hover over Applications Tab
2. Click on Manage Filters
3. Click + Add a New Filter
4. Applicants Type Box appears - Choose between the following options:
  - All Applicants
  - Active Applicants
5. Click + Add Group
6. Under Group 1 - Choose between the following options:
  - Show results matching ALL criteria in this group
  - Show results matching ANY criteria in this group

\*\*\*When choosing applicant types: ALL – will narrow your results, ANY broadens your results

7. Click Add + New Criteria

Dashboard

Applications

Scheduler

Rankings

Reports

Archives

Setup

Program Messages(0)

Manage Filters

View Current Results

View Applications

Exports

Final Offer and Acceptance Program (SOAP) the Season Archive, Bulk Print and CSV Exports features will be available soon. We apologize for any inconvenience this might cause. Thank you for your patience.

Univ of Pittsburgh Medical Center Medical Education > All Groups > [Internal Medicine](#)



Help | Bulk Print Requests | Active

+ Add a new filter

Favorites (36)

SOAP System-Defined (19)

User-Defined (69)

System-Defined (56)



Dashboard

Applications

Scheduler

Rankings

Reports

Archives

Setup

Program Messages(0)

Manage Filters

View Current Results

View Applications

Exports

tal Offer and Acceptance Program (SOAP) the Season Archive, Bulk Print and CSV Exports features wi  
We apologize for any inconvenience this might cause. Thank you for your patience.

Univ of Pittsburgh Medical Center Medical Education > All Groups > [Internal Medicine](#)



Help | Bulk Print Requests | Active

Modify Filter Criteria



Applicants Type

☐ All Applicants

☒ Active Applicants

+ Add Group

Apply

Save

Clear

Results (User's Ad-Hoc last executed Wed Feb 28 16:22:52 EST 2018)





Dashboard

Applications

Scheduler

Rankings

Reports

Archives

Setup

Program Messages(0)

Manage Filters

View Current Results

View Applications

Exports

tal Offer and Acceptance Program (SOAP) the Season Archive, Bulk Print and CSV Exports features wi  
We apologize for any inconvenience this might cause. Thank you for your patience.

Univ of Pittsburgh Medical Center Medical Education > All Groups > [Internal Medicine](#)[Help](#) | [Bulk Print Requests](#) | [Active](#)

## Modify Filter Criteria



## Applicants Type

☐ All Applicants☒ Active Applicants

## Group 1

☒ Show results matching ALL criteria in this group☐ Show results matching ANY criteria in this group

## Add Criteria

Add new Criteria

Add Group

Apply

Save

Clear

Results (User's Ad-Hoc last executed Wed Feb 28 16:22:52 EST 2018)



**Criteria Selection**

Category: User-Defined Attributes

Field: Called or Emailed

Condition: Equals

☐ Ask User for value at filter run time

☒ Yes

☐ No

Add New Criteria Save Criteria Cancel

Criteria Selection box pops up:

8. Use arrow to view dropdown menu options for Category:
  - User-Defined Attributes
9. Use arrow to view dropdown menu options for Field:
  - Called or Emailed
10. Use arrow to view dropdown menu options for Condition:
  - Equals
11. Choose one of the following:
  - Yes
  - No
  - Ask User for value at filter run time
12. Click Save Criteria

## 13. Choose Apply or Save

\*\*\*Tip: When you choose “Apply” you can view the results of the filter to ensure it is accurate before saving.

Electronic Residency Application Service

AAMC

AAMC.ORG MY ACCOUNT MESSAGE CENTER (0) SIGN OUT

ERAS

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

Manage Filters View Current Results View Applications Exports

Univ of Pittsburgh Medical Center Medical Education > All Groups > Internal Medicine

Modify Filter Criteria

Applicants Type

☒ All Applicants ☐ Active Applicants

Group 1

☒ Show results matching ALL criteria in this group  
☐ Show results matching ANY criteria in this group

Add Criteria

Called or Emailed : Equals: Yes

+ Add new Criteria

+ Add Group

Apply Save Clear

Results (User's Ad Hoc last executed Wed Feb 28 13:47:30 EST 2018)



# Called or Emailed Filter narrowed results to 195 Applicants

Electronic Residency Application Service  
**ERAS** | **AAMC**

AAMC.ORG MY ACCOUNT MESSAGE CENTER (0) SIGN OUT

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

Manage Filters View Current Results View Applications Exports

Univ of Pittsburgh Medical Center Medical Education > All Groups > Internal Medicine

Modify Filter Criteria

Results (User's Ad-Hoc last executed Wed Feb 28 13:47:30 EST 2018)

Refine Results  enter value Refine Sort By

Page 1 of 2 Select Page Select All Display 100 Records per page Displaying Results 1 - 100 of 195

Applicant Name	AAMC ID	Most Recent Medical School	E-mail Address
----------------	---------	----------------------------	----------------

# From 4581 Total Active Applicants

Electronic Residency Application Service  
**ERAS** | **AAMC**

AAMC.ORG MY ACCOUNT MESSAGE CENTER (0) SIGN OUT

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

Manage Filters View Current Results View Applications Exports

Univ of Pittsburgh Medical Center Medical Education > All Groups > Internal Medicine

Modify Filter Criteria

Results (Active Applicants last executed Wed Feb 28 13:47:30 EST 2018)

Refine Results  enter value Refine Sort By

Page 1 of 46 Select Page Select All Display 100 Records per page Displaying Results 1 - 100 of 4581

Electronic Residency Application Service

**ERAS** | **AAMC**


AAMC.ORG MY ACCOUNT MESSAGE CENTER (0) SIGN OUT

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

Manage Filters View Current Results View Applications Exports

**tal Offer and Acceptance Program (SOAP) the Season Archive, Bulk Print and CSV Exports features will not be available. We apologize for any inconvenience this might cause. Thank you for your patience.**

Univ of Pittsburgh Medical Center Medical Education > All Groups > [Internal Medicine](#)   | [Help](#) | [Bulk Print Requests](#) | [Active Applicants](#) | [History](#)

**Modify Filter Criteria**   

**Results (User's Ad-Hoc last executed Thu Mar 08 22:33:53 EST 2018)**

Refine Results   enter value  Sort By

Page 1 of 2 |   | Select Page | Select All | Display 100  Records per page | Displaying Results 1 - 100 of 195

<input type="checkbox"/>	Applicant Name	AAMC ID	Most Recent Medical School	E-mail Address
--------------------------	----------------	---------	----------------------------	----------------

To Save the Filter after ensuring its accuracy from Applying it first –

1. Click the down arrow on the Modify Filter Criteria bar

Electronic Residency Application Service | AAMC

AAMC.ORG MY ACCOUNT MESSAGE CENTER (0) SIGN OUT

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

Manage Filters View Current Results View Applications Exports

tal Offer and Acceptance Program (SOAP) the Season Archive, Bulk Print and CSV Exports features will not be available. We apologize for any inconvenience this might cause. Thank you for your patience.

Univ of Pittsburgh Medical Center Medical Education > All Groups > Internal Medicine

Modify Filter Criteria

Applicants Type

☐ All Applicants ☒ Active Applicants

Group 1

☒ Show results matching ALL criteria in this group  
☐ Show results matching ANY criteria in this group

Add Criteria

Called or Emailed : Equals: Yes

+ Add new Criteria

+ Add Group

Apply Save Clear

2. Click the Green Save button.

The screenshot displays the ERAS+ application interface. At the top, a navigation bar includes tabs for Dashboard, Applications, Scheduler, Rankings, Reports, Archives, Setup, and Program Messages(0). Below this, a secondary bar contains links for Manage Filters, View Current Results, View Applications, and Exports. A yellow banner across the top of the main content area contains a warning: "tal Offer and Acceptance Program (SOAP) the Season Archive, Bulk Print and CSV Exports features will not be available. We apologize for any inconvenience this might cause. Thank you for your patience." Below the banner, a breadcrumb trail shows the path: Univ of Pittsburgh Medical Center Medical Education > All Groups > Internal Medicine. A search bar and links for Help, Bulk Print Requests, Active Applicants, and History are also present. The main content area is partially obscured by a 'Save New Filter' dialog box. This dialog box has a title bar with a question mark and a close button. It contains four main sections: 'Name of the filter' with a text input field and a note 'Name is a required field (Maximum 100 Characters)'; 'Field Condition' with a dropdown menu showing 'Called or Emailed Equals true'; 'Sorted By' with a dropdown menu; and 'Description of the filter' with a text input field and a note 'Description is a required field(Maximum 500 Characters)'. At the bottom of the dialog are 'Save As New' and 'Cancel' buttons. Red arrows point to the 'Name of the filter' and 'Description of the filter' fields. In the background, a 'Modify Filter' panel is visible on the left, and a list of filters is on the right, including one with a red 'X' icon. At the bottom right of the main content area are 'Apply', 'Save', and 'Clear' buttons.

2. Save New Filter box appears
  - You must enter a Name & Description.
3. Once requirements have been met for the above – the green Save As New button will light up.
4. You will get a Success pop-up message on your screen.

# Favorite Filters (Most-Used)



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

Manage Filters View Current Results View Applications Exports

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Univ of Pittsburgh Medical Center Medical Education > All Groups > Internal Medicine

Add a new filter

### Favorites (36)

★ Active Applicants	★ Called or Emailed - AOA or Gold or URM
★ Called or Emailed - Not Yet Invited or Selected for Invite	★ CAT- Selected but not yet Invited for Interview - LMP
★ GH - Invited - LMP	★ GH - Scheduled - LMP

### SOAP System-Defined (19)

★ SOAP Applicant	★ SOAP Applicant Medical Degree Date of Graduation Less than 5 Years
★ SOAP D.O Graduates	★ SOAP Eligibility Advanced
★ SOAP Eligibility Categorical	★ SOAP Eligibility Preliminary
★ SOAP Eligibility Primary Care	★ SOAP Eligibility Reserved for Physician Only
★ SOAP Foreign Graduates	★ SOAP Foreign Graduates with US Citizenship
★ SOAP Fully Matched Applicants	★ SOAP Fully Unmatched Applicants
★ SOAP Partially Matched Applicants	★ SOAP Partially Matched Applicants and Eligible for Advanced
★ SOAP Partially Matched Applicants and Eligible for Preliminary	★ SOAP Reapply Applicant
★ SOAP Track Applied by Applicant	★ SOAP US Graduates
★ SOAP US/Canadian Graduates	

### User-Defined (69)

★ RP Scheduled - LMP	✎ ✖ ★ Schedule Start Date	✎ ✖
★ start date	✎ ✖ ★ STATS - CAT - Total Interviewed - LMP	✎ ✖
★ STATS - CAT - Total Invited - LMP	✎ ✖ ★ STATS - CAT - Total Scheduled - LMP	✎ ✖
★ STATS - CAT WITH AOA - TOTAL SCHEDULED - LMP	✎ ✖ ★ STATS - TOTAL APPLICANTS WITH PRELIMS - LMP	✎ ✖
★ STATS - TOTAL CAT APPLICANTS - LMP	✎ ✖ ★ STATS - TOTAL CAT US GRADS - LMP	✎ ✖

### System-Defined (56)

★ 2 LoRs and COMLEX-USA Transcript	★ 2 LoRs and USMLE Transcript
★ 3 LoRs and COMLEX-USA Transcript	★ 3 LoRs and USMLE Transcript

# Creating a Multi-Layer Filter – Step by Step Guide

Filter for candidates that meet the following criteria:

- From Regional medical schools (PA, OH, WV), Underrepresented in medicine, and have USMLE Step 1 score of 200 or greater

1. Hover over Applications Tab
2. Click on Manage Filters
3. Click + Add a New Filter
4. Applicants Type Box appears - Choose between the following options:
  - All Applicants
  - **Active Applicants**
5. Click + Add Group
6. Under Group 1 - Choose between the following options:
  - **Show results matching ALL criteria in this group**
  - Show results matching ANY criteria in this group
7. Click Add + New Criteria

Criteria Selection box pops up:

Dashboard

Applications

Scheduler

Rankings

Reports

Archives

Setup

Program Messages(0)

Manage Filters

View Current Results

View Applications

Exports

Final Offer and Acceptance Program (SOAP) the Season Archive, Bulk Print and CSV Exports features will be available soon. We apologize for any inconvenience this might cause. Thank you for your patience.

Univ of Pittsburgh Medical Center Medical Education > All Groups > [Internal Medicine](#)



Help | Bulk Print Requests | Active

+ Add a new filter

Favorites (36)

SOAP System-Defined (19)

User-Defined (69)

System-Defined (56)



Dashboard

Applications

Scheduler

Rankings

Reports

Archives

Setup

Program Messages(0)

Manage Filters

View Current Results

View Applications

Exports

tal Offer and Acceptance Program (SOAP) the Season Archive, Bulk Print and CSV Exports features wi  
We apologize for any inconvenience this might cause. Thank you for your patience.

Univ of Pittsburgh Medical Center Medical Education > All Groups > [Internal Medicine](#)



Help | Bulk Print Requests | Active

Modify Filter Criteria



Applicants Type

☐ All Applicants

☒ Active Applicants

+ Add Group

Apply

Save

Clear

Results (User's Ad-Hoc last executed Wed Feb 28 16:22:52 EST 2018)







Dashboard

Applications

Scheduler

Rankings

Reports

Archives

Setup

Program Messages(0)

Manage Filters

View Current Results

View Applications

Exports

tal Offer and Acceptance Program (SOAP) the Season Archive, Bulk Print and CSV Exports features wi  
We apologize for any inconvenience this might cause. Thank you for your patience.

Univ of Pittsburgh Medical Center Medical Education > All Groups > [Internal Medicine](#)

Help | Bulk Print Requests | Active

Modify Filter Criteria

## Criteria Selection



Category:

Add New Criteria

Save Criteria

Cancel

## Group 1

☒ Show results matching ALL criteria in this group☐ Show results matching ANY criteria in this group

Add Criteria

+ Add new Criteria

+ Add Group

Apply

Save

Cancel

Results (User's Ad-Hoc last executed Wed Feb 28 16:22:52 EST 2018)

Electronic Residency Application Service

ERAS A.A.M.C.

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

Manage Filters View Current Results View Applications Exports

Initial Offer and Acceptance Program (SOAP) the Season Archive, Bulk Print and CSV Exports features will not be available. We apologize for any inconvenience this might cause. Thank you for your patience.

Univ of Pittsburgh Medical Center Medical Education > All Groups > Internal Medicine

Modify Filter Criteria

Applicants Type

All Applicants Active Applicants

**Criteria Selection**

Category: Medical Education

Field: Medical School State/Province

Condition: Equals

Ask User for value at filter run time

Utah  
Vermont  
Virgin Islands  
Virginia  
Washington  
West Virginia

Add New Criteria Save Criteria Cancel

8. Use arrow to view dropdown menu options for Category:

- Medical Education

9. Use arrow to view dropdown menu options for Field:

- Medical School  
State/Province

10. Use arrow to view dropdown menu options for Condition:

- Equals

11. Select all 3 states: OH, PA, WV by placing a checkmark in each of their respective boxes

12. Click Save Criteria

\*\*\*Tip: Use the Ctrl + F (Find Function) to help when searching through a large list

Electronic Residency Application Service

ERAS | AAMC

AAMC.ORG MY ACCOUNT MESSAGE CENTER (0) SIGN OUT

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

Manage Filters View Current Results View Applications Exports

Final Offer and Acceptance Program (SOAP) the Season Archive, Bulk Print and CSV Exports features will not be available. We apologize for any inconvenience this might cause. Thank you for your patience.

Univ of Pittsburgh Medical Center Medical Education > All Groups > Internal Medicine

Modify Filter Criteria

Applicants Type

☐ All Applicants ☒ Active Applicants

Group 1

☒ Show results matching ALL criteria in this group  
☐ Show results matching ANY criteria in this group

Add Criteria

Medical School State/Province: Equals: Ohio- Pennsylvania- West Virginia

+ Add new Criteria

+ Add Group

☒ AND ☐ OR

Group 2

☐ Show results matching ALL criteria in this group  
☒ Show results matching ANY criteria in this group

Add Criteria

+ Add new Criteria

+ Add Group

13. Click + Add Group

14. Choose AND or OR

\*\*\*You will get a larger number of results choosing "OR"

15. Under Group 2 - Choose between the following options:

- Show results matching ALL criteria in this group
- Show results matching ANY criteria in this group

16. Click + Add New Criteria

Criteria Selection

Category: Demographics

Field: Self Identification

Condition: Equals

Ask User for value at filter run time

American Indian or Alaskan Native

Add New Criteria Save Criteria Cancel

Criteria Selection box pops up:

17. Use arrow to view dropdown menu options for Category:

- Demographics

18. Use arrow to view dropdown menu options for Field:

- Self Identification

19. Use arrow to view dropdown menu options for Condition:

- Equals

20. Use dropdown menu to select American Indian or Alaskan Native

Modify Filter Criteria

Applicants Type

All Applicants Active Applicants

**Criteria Selection**

Category: Demographics Field: Self Identification Condition: Equals ☐ Ask User for value at filter run time

Applicant Ranking

Applicants Type

Application Status

Assignment Information

Awards and Recognitions

Citizenship

Communication

Composite Score

Custom Scores

Custom Status

Demographics

Document Scores

Documents

Exams

Felony/Misdemeanor

Field: Self Identification

AAMC ID

Applicant First Name

Applicant Gender

Applicant Last Name

Applicant Middle Name

Applicant Preferred Name

Applicant Previous Last Name

Applicant Suffix

Birth Date

Birth Place

E-mail Address

Self Identification

Condition: Equals ☐ Ask User for value at filter run time

Black or African American

American Indian or Alaskan Native

Add New Criteria Save Criteria Cancel

21.Add New Criteria

22.Use arrow to view dropdown menu options for Category:

- Demographics

23.Use arrow to view dropdown menu options for Field:

- Self Identification

24.Use arrow to view dropdown menu options for Condition:

- Equals

25.Use dropdown menu to select Black or African American



Modify Filter Criteria

Criteria Selection

Category: Demographics

Applicant Ranking

Applicants Type

Application Status

Assignment Information

Awards and Recognitions

Citizenship

Communication

Composite Score

Custom Scores

Custom Status

Demographics

Document Scores

Documents

Exams

Felony/Misdemeanor

Field: Self Identification

AAMC ID

Applicant First Name

Applicant Gender

Applicant Last Name

Applicant Middle Name

Applicant Preferred Name

Applicant Previous Last Name

Applicant Suffix

Birth Date

Birth Place

E-mail Address

Self Identification

Condition: Equals

Ask User for value at filter run time

Equals

Hispanic, Latino, or of Spanish origin

Not equal to

Condition: Equals

Ask User for value at filter run time

Black or African American

Condition: Equals

Ask User for value at filter run time

American Indian or Alaskan Native

Add New Criteria

Save Criteria

Cancel

26.Add New Criteria

27.Use arrow to view dropdown menu options for Category:

- Demographics

28.Use arrow to view dropdown menu options for Field:

- Self Identification

29.Use arrow to view dropdown menu options for Condition:

- Equals

30.Use dropdown menu to select Hispanic, Latino, or of Spanish origin

**Criteria Selection**

Category	Field	Condition	Value	Ask User for value at filter run time
Demographics	Self Identification	Equals	Native Hawaiian or Pacific Islander	<input type="checkbox"/>
Assignment Information	Applicant Last Name	Equals	Hispanic, Latino, or of Spanish origin	<input type="checkbox"/>
Composite Score	Applicant Suffix	Equals	Black or African American	<input type="checkbox"/>
Document Scores	Self Identification	Equals	American Indian or Alaskan Native	<input type="checkbox"/>

**Add New Criteria** **Save Criteria** **Cancel**

26.Add New Criteria

27.Use arrow to view dropdown menu options for Category:

- Demographics

28.Use arrow to view dropdown menu options for Field:

- Self Identification

29.Use arrow to view dropdown menu options for Condition:

- Equals

30.Use dropdown menu to select Native Hawaiian or Pacific Islander

**Criteria Selection**

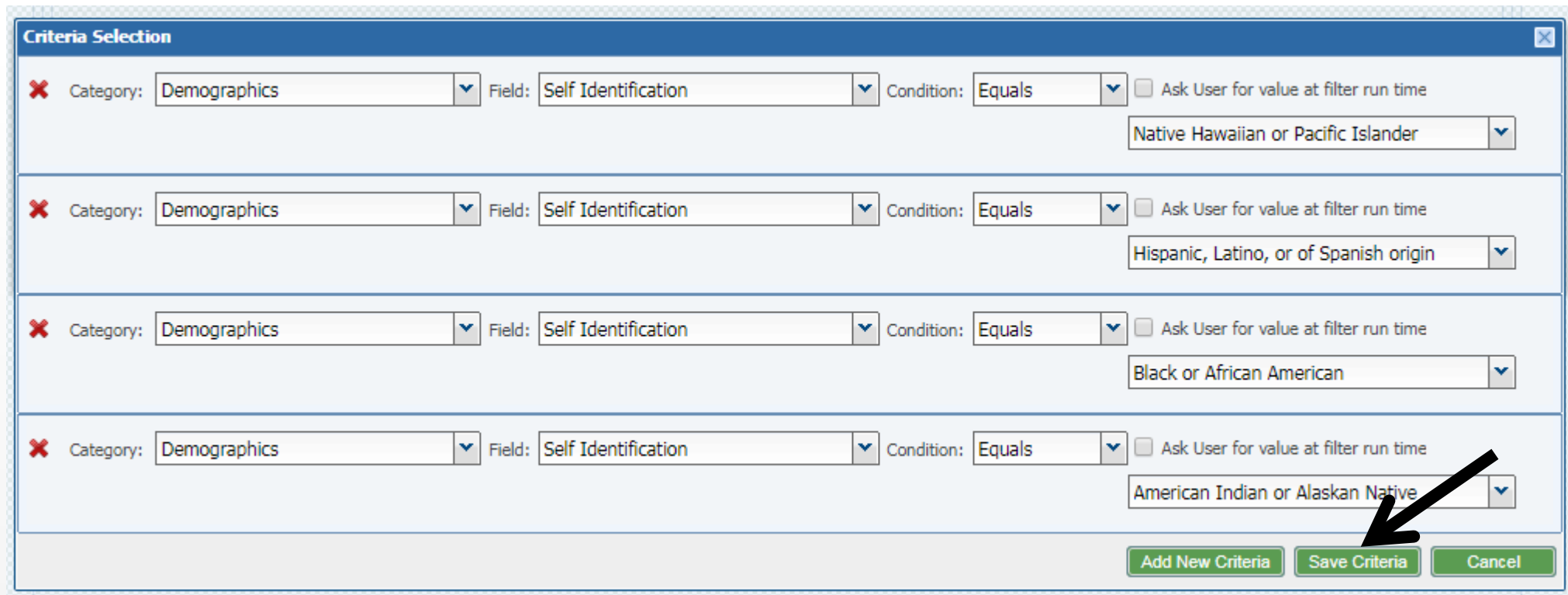
✖ Category: Demographics Field: Self Identification Condition: Equals ☐ Ask User for value at filter run time  
Native Hawaiian or Pacific Islander

✖ Category: Demographics Field: Self Identification Condition: Equals ☐ Ask User for value at filter run time  
Hispanic, Latino, or of Spanish origin

✖ Category: Demographics Field: Self Identification Condition: Equals ☐ Ask User for value at filter run time  
Black or African American

✖ Category: Demographics Field: Self Identification Condition: Equals ☐ Ask User for value at filter run time  
American Indian or Alaskan Native

Add New Criteria Save Criteria Cancel



31.Click Save Criteria



Dashboard

Applications

Scheduler

Rankings

Reports

Archives

Setup

Program Messages(0)

Manage Filters

View Current Results

View Applications

Exports

ntal Offer and Acceptance Program (SOAP) the Season Archive, Bulk Print and CSV Exports features will not be avail  
We apologize for any inconvenience this might cause. Thank you for your patience.

Univ of Pittsburgh Medical Center Medical Education &gt; All Groups &gt; Internal Medicine

Help | Bulk Print Requests | Active Applicants | History

## Modify Filter Criteria

## Applicants Type

☐ All Applicants ☒ Active Applicants

## Group 1

- ☒ Show results matching ALL criteria in this group  
☐ Show results matching ANY criteria in this group

## Add Criteria

Medical School State/Province: Equals: Ohio- Pennsylvania- West Virginia

+ Add new Criteria

☒ AND ☐ OR

## Group 2

- ☐ Show results matching ALL criteria in this group  
☒ Show results matching ANY criteria in this group

## Add Criteria

Self Identification: Equals: American Indian or Alaskan Native

Self Identification: Equals: Hispanic, Latino, or of Spanish origin

Self Identification: Equals: Black or African American

Self Identification: Equals: Native Hawaiian or Pacific Islander

+ Add new Criteria

+ Add Group

Apply

Save

Clear

32.Click + Add Group

33. Choose **AND** or OR

34. Under Group 3 - Choose between the following options:

- **Show results matching ALL criteria in this group**
- Show results matching ANY criteria in this group

35. Click + Add New Criteria

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

Manage Filters View Current Results View Applications Exports

We apologize for any inconvenience this might cause. Thank you for your patience.

Univ of Pittsburgh Medical Center Medical Education > All Groups > Internal Medicine

Modify Filter Criteria

Applicants Type

☐ All Applicants ☒ Active Applicants

Group 1

☒ Show results matching ALL criteria in this group  
☐ Show results matching ANY criteria in this group

Add Criteria

Medical School State/Province: Equals: Ohio- Pennsylvania- West Virginia

+ Add new Criteria

☒ AND ☐ OR

Group 2

☐ Show results matching ALL criteria in this group  
☒ Show results matching ANY criteria in this group

Add Criteria

Self Identification: Equals: American Indian or Alaskan Native  
Self Identification: Equals: Black or African American  
Self Identification: Equals: Hispanic, Latino, or of Spanish origin  
Self Identification: Equals: Native Hawaiian or Pacific Islander

+ Add new Criteria

☒ AND ☐ OR

Group 3

☒ Show results matching ALL criteria in this group  
☐ Show results matching ANY criteria in this group

Add Criteria

+ Add new Criteria

+ Add Group

Apply Save Clear

36. Use arrow to view dropdown menu options for Category:

- Exams

37. Use arrow to view dropdown menu options for Field:

- USMLE Step 1 Score

38. Use arrow to view dropdown menu options for Condition:

- Is at least

39. Type 200 in blank box

40. Click Save Criteria

The screenshot shows the 'Criteria Selection' dialog box with the following configuration:

- Category:** Exams (dropdown menu is open showing options like Applicant Ranking, Applicants Type, Application Status, Assignment Information, Awards and Recognitions, Citizenship, Communication, Composite Score, Custom Scores, Custom Status, Demographics, Document Scores, Documents, Exams, and Felony/Misdemeanor).
- Field:** USMLE Step 1 Score (dropdown menu is open showing options like COMLEX-USA Level 2 PE Date, COMLEX-USA Level 2 PE Score, COMLEX-USA Level 2 PE Status, COMLEX-USA Level 3, COMLEX-USA Level 3 Date, COMLEX-USA Level 3 Score, COMLEX-USA Level 3 Status, USMLE Step 1, USMLE Step 1 Date, USMLE Step 1 Score, USMLE Step 1 Status, USMLE Step 2 CK, USMLE Step 2 CK Date, USMLE Step 2 CK Score, and USMLE Step 2 CK Status).
- Condition:** Is at least (dropdown menu is open showing options like Equals, In between, Is at least, Is at most, Is less than, Is more than, and Not equal to).
- Value:** 200 (text input box).
- Buttons:** Add New Criteria, Save Criteria, and Cancel.

A black arrow points to the 'Save Criteria' button.

The **FINISHED** Product!

41. Click Apply or Save

Modify Filter Criteria

Applicants Type

☐ All Applicants

☒ Active Applicants

Group 1

☒ Show results matching ALL criteria in this group

☐ Show results matching ANY criteria in this group

Add Criteria

Medical School State/Province: Equals: Ohio- Pennsylvania- West Virginia

+ Add new Criteria

☒ AND ☐ OR

Group 2

☐ Show results matching ALL criteria in this group

☒ Show results matching ANY criteria in this group

Add Criteria

Self Identification: Equals: American Indian or Alaskan Native

Self Identification: Equals: Black or African American

Self Identification: Equals: Hispanic, Latino, or of Spanish origin

Self Identification: Equals: Native Hawaiian or Pacific Islander

+ Add new Criteria

☒ AND ☐ OR

Group 3

☒ Show results matching ALL criteria in this group

☐ Show results matching ANY criteria in this group

Add Criteria

USMLE Step 1 Score: Is at least: 200

+ Add new Criteria

+ Add Group

Apply

Save

Clear

# The Results!

30 candidates matching our criteria:

GROUP 1: Attended medical school in any of the following: OH, PA, or WV

AND

GROUP 2: Self-identified as any of the following: American Indian or Alaskan Native, Black or African-American, Hispanic, Latino, or of Spanish origin, or Native Hawaiian or Pacific Islander

AND

GROUP 3: Received a score of 200 or greater on their USMLE Step 1 exam

Dashboard

Applications

Scheduler

Rankings

Reports

Archives

Setup

Program Messages(0)

Manage Filters

View Current Results

View Applications

Exports

Univ of Pittsburgh Medical Center Medical Education > All Groups > Internal Medicine

Help | Bulk Print Requests | Active Applicants | History

Modify Filter Criteria

Results (User's Ad Hoc last executed Wed Feb 28 16:22:52 EST 2018)

Refine Results enter value Refine Sort By

Page 1 of 1

Select Page

Select All

Display 100 Records per page

Displaying Results 1 - 30 of 30

Applicant Name	AAMC ID	Most Recent Medical School	E-mail Address
		University of Pittsburgh School of Medicine	
		Case Western Reserve University School of Medicine	
		University of Pittsburgh School of Medicine	
		Perelman School of Medicine at the University of Pennsylvania	
		Geisinger Commonwealth School of Medicine	
		Ohio State University College of Medicine	
		Sidney Kimmel Medical College at Thomas Jefferson University	
		Perelman School of Medicine at the University of Pennsylvania	
		Sidney Kimmel Medical College at Thomas Jefferson University	
		Perelman School of Medicine at the University of Pennsylvania	
		Ohio State University College of Medicine	
		Drexel University College of Medicine	
		Drexel University College of Medicine	
		Sidney Kimmel Medical College at Thomas Jefferson University	
		Geisinger Commonwealth School of Medicine	
		Wright State University Boonshoft School of Medicine	
		Wright State University Boonshoft School of Medicine	
		University of Pittsburgh School of Medicine	
		Sidney Kimmel Medical College at Thomas Jefferson University	
		Drexel University College of Medicine	
		The University of Toledo College of Medicine	
		Perelman School of Medicine at the University of Pennsylvania	
		Pennsylvania State University College of Medicine	
		Lewis Katz School of Medicine at Temple University	
		Lewis Katz School of Medicine at Temple University	
		Perelman School of Medicine at the University of Pennsylvania	
		Perelman School of Medicine at the University of Pennsylvania	
		Drexel University College of Medicine	
		Perelman School of Medicine at the University of Pennsylvania	
		The University of Toledo College of Medicine	

Page 1 of 1

Select Page

Select All

Display 100 Records per page

Displaying Results 1 - 30 of 30

Action to perform on selected applicants: Select a bulk action Go

# So Now What?

- You've got your attributes set up ☒
- You've got your filters set up ☒

Time to maximize the data!



# Exporting to Excel

Filtering, Averaging, Sorting = Triumphing




Fast and Furious: Administrator Edition

**\*With the filter you want to run a data report on, please select View Current Results  
(example all interviewed or will start)**



# Sample #1: Average USMLE Scores



 CSV exports run against all the applicants from the View Current Results unless the applicants are selected in View Current Results

 [Add a new export template](#)

## CSV Export Name

## Type of data to export

### Available Fields

Medical License Type  
Medical Licenses Expiration Date  
Medical Licensure Problem  
Medical Licensure Problem Reason  
NBOME ID  
PALS  
PALS Expiration Date  
USMLE ID  
USMLE Step 3 Score



### Fields to Export

USMLE Step 1 Score  
USMLE Step 2 CK Score  
USMLE Step 2 CS Score

Save as New & Run

Save & Run

Run

Clear



# Sample #1: Average USMLE Scores continued

reason

Save as New & Run Save & Run Run Clear

CSV Exports	
CSV Export Name	Status
Step Scores	complete



Clipboard Font Alignment Number Formatting Styles

**POSSIBLE DATA LOSS** Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format. Don't show again Save As...

E14

File name: Sample USMLE Average

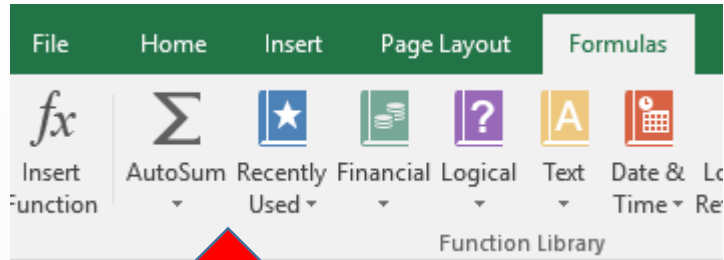
Save as type: Excel Workbook

Authors: Shacklock, Haylee Tags: Add a tag Title: Add a title

☐ Save Thumbnail

hide Folders Tools Save

# Sample #1: Average USMLE Scores continued



235	271	276
236	272	265
237	272	282
238	276	272
239	=AVERAGE(A2:A238)	
240	AVERAGE(number1, [number2], ...)	
241		
242		

Live Demo

A	B	C
USMLE Step 1 Score	USMLE Step 2 CK Score	USMLE Step 2 CS Score
268	269	Pass
268	272	Pass
269	267	Pass
270	272	Pass
270	259	Pass
271	276	Pass
272	265	Pass
272	282	Pass
276	272	Pass
248	267	

Live Demo

# Example # 2: AOA by Medical School and Track

**\*With the filter you want to run a data report on, please select View Current Results  
(example all interviewed or will start)**



# Example # 2: AOA by Medical School and Track

## Live Demo

CSV Export Name  
AOA

Type of data to export

Personal x v

- Application Status
- Attributes
- Custom Status
- Documents
- Education
- Exams/Licenses/Certifications
- Experience
- Interview Status
- Interviewer Date/Score/Comments/Location
- Limiting Factors
- Local Documents
- Notes
- Personal
- Publications
- Ranking

Fields to Export

- Last Name
- First Name
- Medical School of Graduation
- CST
- GH
- Generalist
- Geriatrics
- Alpha Omega Alpha (Yes/No)
- Gender



Write down a few ideas that popped into your mind for potential stats your Program Leadership asks you for that you spend a lot of time on.



**What is a popular statistic your Program Director always asks you to report on?**

Any questions about Attributes, Filters,  
Sorting?

Small group break out – submit other ERAS  
related questions and at least 1 Best Practices to  
share with the group



Additional Questions?

Feel free to reach out via email:

Lauren Petty: [andersonlm2@upmc.edu](mailto:andersonlm2@upmc.edu)

Haylee Shacklock: [shacklockha@upmc.edu](mailto:shacklockha@upmc.edu)