Getting the most out of ERAS for your best recruitment season ever!

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HELLO
my name is
Agenda

- Welcome and Introduction
- “How to Screen”
- “How to Schedule”
- “How to Select”
- Practice makes Perfect!
- Wrap up
Goals and Objectives

- Construct Custom ERAS Filters to search for candidates with particular characteristics and experiences
- Utilize ERAS self-scheduler to create a calendar of interview dates for applicants to use to schedule their own interview date
- Execute a CSV export of sorted applicant data from ERAS
What you need for today!

- ERAS Access
- A computer/tablet with internet access
“How to Screen”
Filters make the recruitment world go ‘round!

- Allow you to narrow down your applicant pool based on particular characteristics
- Many pre-created filters exist in the ERAS system
- You can create your own filters to make your search easier!
How to create a filter

- Decide when you need filters
  - Initial interview screening
  - Subsequent interview offers
  - Personalized filters for each reviewer
  - Custom filters looking for particular types of applicants

- Decide what the desired search criteria are for each type of filter
“Prompt fields”

- Special type of filter
  - After you select the filter, ERAS “prompts” you for further information
  - Once you’ve specified additional information, ERAS will populate applicants who meet criteria
    - Examples – visa type, interview date
## Example of a prompted filter

<table>
<thead>
<tr>
<th>System-Defined (56)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2 LoRs and COMLEX-USA Transcript</td>
<td>2 LoRs and USMLE Transcript</td>
</tr>
<tr>
<td>3 LoRs and COMLEX-USA Transcript</td>
<td>3 LoRs and USMLE Transcript</td>
</tr>
<tr>
<td>3 LoRs Missing</td>
<td>3 LoRs Received</td>
</tr>
<tr>
<td>3 LoRs, MSPE, COMLEX-USA Transcript</td>
<td>3 LoRs, MSPE, USMLE Transcript</td>
</tr>
<tr>
<td>Active Applicants</td>
<td>All Applicants</td>
</tr>
<tr>
<td>Applicant Applied Date</td>
<td>Applicants (excluding Osteopathic) Missing USMLE Transcripts</td>
</tr>
<tr>
<td>Applicants Assigned</td>
<td>Applicants Not Reviewed</td>
</tr>
<tr>
<td>Applicants Reviewed and Not Selected to Interview</td>
<td>Applicants Scheduled for Interview</td>
</tr>
<tr>
<td>Applicants Where Date Reviewed Precedes Date of Latest Document</td>
<td>Applicants with No US or Canadian Residency</td>
</tr>
<tr>
<td>Applicants with US or Canadian Residency</td>
<td>Canadian Graduates</td>
</tr>
<tr>
<td>COMLEX-USA Missing</td>
<td>COMLEX-USA Received</td>
</tr>
<tr>
<td>Composite Score</td>
<td><strong>Current Visa Status</strong></td>
</tr>
<tr>
<td>Dept. Chair LoR Missing</td>
<td>Dept. Chair LoR Received</td>
</tr>
<tr>
<td>Foreign Graduates</td>
<td>Interview Date(s)</td>
</tr>
</tbody>
</table>
Example of a prompted filter

[Image of a prompted filter with a dropdown menu for current visa types]
Let’s build a filter!

- Characteristics for our search
  - Couples match (no preset ERAS filter)

- Filter Name
  - Couples!
Let’s build a filter! Important Concepts

- **And** narrows results
- **Or** broadens results
- **All**
- **Any**
Let’s build a filter!

- Characteristics for our search
  - ALL
    - Active applicants
    - Invited applicants
  AND
  - ANY
    - AOA
    - Gold Humanism

Filter Name: Overachievers
Let’s build a filter!

- Your turn!
  - Use the worksheet to decide on search criteria for your filter and your new filter name
  - Build your filter in ERAS

- Be prepared to share your creation with the large group.
Get Creative!

Did you know that you can search ERAS for:

- Geography
- Very specific words/phrases
  - research or health vs. “NIH”
  - scholarship/award vs. “Nobel”
  - Volunteer experience vs. “Peace Corps”
- Advanced education degrees
“How to Schedule”
Self-schedule? Yes, please!

- Fitting all of your applicants into your interview schedule dates can be tricky and time consuming.
  - Let your applicants do the work for you!
    - ERAS has a self-scheduler modality.
How to use the self-scheduler

- Create “RSVP events” for each date that is available for interviews
- Select number of applicants that can interview each day
- Set your “freeze date”
  – Can schedule/reschedule until freeze date
  – Can cancel after freeze date
How to use the self-scheduler

- Create separate events for special applicants (med-peds, child neurology, etc.)
- Send bulk invitation to “selected” applicants and select all available interview dates
- Instructions for applicants on how to self schedule available on AAMC website
Let’s make an RSVP event!
Let’s make an RSVP event!

- Your turn!

– Create your own RSVP event with multiple dates to allow self scheduling
Tips for successful self-scheduling

- Keep track of total interview slots per day (categorical, med-peds, neuro, etc.)
- Set your freeze date far enough in advance to give you time to make interview day schedules
- Applicants can cancel after the freeze date, so be sure to continually check your interview numbers
“How to Select”
Get to know CSV Exports

- Allows you to print out selected data about your applicants in an efficient and organized way
- Templates exist in the ERAS system
- You can create your own custom CSV export lists!
- Get comfortable with Excel (it’s your new BFF!)
Get to know CSV Exports

How can you use CSV Exports?

– Mail Merge Data Source
  – Information for name tags (Name, School)
  – Address labels for letters
– Applicant summaries for bio-sheets
– Rank list creation
Let’s build a CSV export!

- ERAS will only export data about applicants in current filter

  - You must have a filter created for whatever data you want to exp
Let’s build a CSV export!

- Characteristics for our search
  - Couples
    - Run “Couples!” filter
    - Select all
  - Dropdown window for CSV export
    - Select predefined template or create own

- Template Name = Applicants applying as a Couple
Let’s build a CSV export!

- Your turn!
  - What should we export?
  - Let’s work together to create our template and CSV export file.
PRACTICE MAKES PERFECT
Screen shot online help community site?

ERAS PDWS User

FOLDERS
- ERAS PDWS User
  - Job Aides
  - E-Learning
  - General
  - Webinar
  - Training Videos

FOLDER CONTENTS
- Medical Eduation Filters
- Attachments
- Picture not printing on applicant interview schedule
- RE: Faculty Interviewers/How do they know who they are interviewing?
- RE: How To Print Applicant Interview Schedule
- RE: Open slots / waitlist
- RE: Setting up interview dates
- RE: Will Start .txt
- Setting a Freeze date
- Will Start .txt Attachments
Recruitment Made Easy

Filters
Self-Scheduling
CSV Exports
Questions?

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