PDWS Interview Scheduler Help

This Scheduler module is designed to make scheduling applicants through the PDWS more flexible and less restrictive. The Help Text below is created to help you use the Scheduler module. If you have any other questions, please visit the Community Site's Library to access additional training resources regarding the Scheduler. You can also contact our ERAS HelpDesk at 202-828-0413 or the ERAS contact form.

Scheduler Setup

After navigating to the Scheduler tab, there is a Scheduler section under the Setup tab. This Scheduler setup consists of three areas: Calendar, Locations, and Reports.

- Calendar: This area allows you to select the program's business start and end times as well as default interview length.
- Locations: This area allows you to create interview locations and meeting rooms for pairing with applicants.
- Reports: This area allows you to indicate whether you want applicants marked with the Invited Privately status to be included in the Invited status count. (Yes is selected by default)

Navigate back to the Scheduler tab to exit Scheduler Setup.

Interview Status Counts

Interview counts give you a snapshot of where applicants are in the interview process. Click the count of the applicants to take you to the Reports tab where you can view additional information as well as print the reports to PDF.

Views

Under the Interview Status Counts, there are different views to digest information in the Scheduler: Calendar, Applicants, Events, Invitations, Interviewers, and Responses. Toggle between each of the views to complete various scheduling tasks.

Calendar

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

- Private events are in purple and are managed by the program only
- RSVP events are in green and can be included in an Invitation to allow applicants to self-schedule for an interview in MyERAS.

Left of the calendar, you can filter by the type of event (Private or RSVP), events with open slots (Scheduled or Waitlisted), events with missing interviewer pairings, or events with no invited applicants. By default, all events show on the calendar; check one or more type of event to only show those events.

Click an event to view more details such as applicants that have been scheduled or paired with an interviewer(s) or to edit the event.

All program users should only have one PDWS role assigned to them. If multiple roles are assigned the user will be restricted to the lower role. Program Super Users, Alternative Program Super Users, and Program Coordinators can see the calendar schedules for all applicants and all interviewers.

Interviewer role users are restricted to viewing only 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 marked with the 'Selected to Interview' status. From the left side, you can filter by applicants based on their tracks or interview status. From the right side, you can view the applicant's name, most recent medical school (for residency applicants) or most recent residency (for fellowship applicants) and their interview status. On the right in blue, there is a tally of applicants next to the Rows per Page: Number of Applicants Displayed/ Number of Applicants based on Tracks Selected (Total number of applicants when all tracks are selected).

Notice the indicators displaying next to applicant names to show their interview status. Hover over the status indicators to view:

- Invited: RSVP Events date(s) included in an Invite was sent to this applicant
- Invited Privately: The date the applicant was marked with the Invited Privately status
- Scheduled: Date(s) applicant is scheduled to come for an interview
- Waitlisted: Date(s) applicant is currently waitlisted to come for an interview
- Declined: Date the applicant or program declined the RSVP Invitation
- Interviewed: Date the applicant was marked with the Interviewed Status.

You can perform a number of actions individually for a specific applicant or select multiple applicants and complete a bulk action.
Click the applicant name to view interview details about the applicant.

Under the action column, there are a number of actions that you can perform. Click the drop-down arrow to view a list.

- View Application- allows you to quickly navigate to the applicant's View Applications page where you can view application tabs, open documents, mark statuses, or leave interview comments/scores/notes.
- Details- provides interview details about the applicant, such as the dates the applicant was invited for, dates the applicant was scheduled and if the applicant has been paired with any interviewers.
- Send Message- a compose message module pop up allows you to send a message to an applicant. (This does not change their interview status or invite them to self-schedule for any dates but the message will be stored in the applicant's View Application Communication tab.)
- Invite- this allows you to send a list of created RSVP events to the applicant and enables them to self-schedule or waitlist for an interview date at your program.
- Select for Ranking- will mark the Selected for Ranking status for the applicant so that you can rank them in the Ranking module.
- Mark as Interviewed- will change their interview status to Interviewed.
- Mark as Declined- will change their interview status to Declined.
- Mark as Invited privately- will mark the invited privately status.

Events

The Events page provides a list of all Private and RSVP events created in the program. Next to each event you will find the following: date of the event, the duration(AM/PM/All Day), the freeze date (For RSVP events only), the number of invited applicants, the 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.

- For Private events, you can edit the event details (Event name, Start Date, End Date, Duration, Slots, etc.), schedule/waitlist applicants for interviews.
- For RSVP Events, you can edit the event details (except the freeze date) as well as see applicants who have been invited, scheduled, or waitlisted. (Note: Some actions for RSVPs will require you to send a notification to applicants.)

By default, all events show on the calendar; check one or more type(s) of event(s) to only show those events on the calendar. You can filter by 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 applicants.

Invitations (For RSVP Only)

Only RSVP Events can be sent to applicants through Invitations. The invitations section tracks all invitations you have drafted or sent to applicant(s). Each sent invitation shows the date you sent the invitation, number of applicant(s) the invitation was sent to, and the number of event(s) included. Click the header names to sort the columns. Click the status or the invitation name to view the original invitation sent. Only drafts are able to be edited, sent invitations can only be viewed in read-only.

Interviewers

The interviewers section 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 interviewer's you would like to view. The interviewers view works best in the Day view to see which interviewers are available; however you can also select the Week view or the Month view to horizontally scroll through.

Responses (For RSVP Only)

The Responses section tracks all RSVP invited applicant activities for RSVP events only. This view displays the applicant, their applicant status and the date and time that they self-scheduled, waitlisted, or declined. On the left, filter by applicant tracks or 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.

Private Events

These dates display on the calendar in purple, cannot be sent to applicants for self-scheduling or waitlisting. Private Events will only display in the PDWS.

To create a Private Event:

1. From the calendar view, click and highlight the interview date(s) from the calendar
2. Click 'New Event' from the top left drop down.
3. On the left side, you will find each date you have selected listed in row(s). Each row indicates a Private Event being created.
   Note: Duration can be: All day event, AM, or PM. Specific times when sending a message to applicants.
4. To add more Private Event dates, click ‘Add Date'.
5. Enter in a Name (required) and details, if necessary. Names are not shared with applicants but can be used to quickly identify a group of Private Event dates.
6. Select the number of schedule and waitlist slots.

At the top right, select 'Save' or 'Save and Add Applicants'.

- 'Save' at any time you can come back and add applicants and pair them with interviewers.
- 'Save and Add Applicants' it takes you where you can schedule applicants for that event and add interviewers.

To continue and schedule applicants for a Private Event by clicking 'Save and Add Applicants':

1. Click 'Save and Add Applicants'.
2. From the Applicants column, select applicant(s) by checking the box next to their name.
3. After selecting the applicants, from the drop-down click 'Move to Scheduled' or 'Move to Waitlisted'. Applicants now appear in the Scheduled or Waitlisted columns, shaded in light blue.

4. Click 'Save' in the top right.

To Pair Applicants with Interviewers or Add a time/location:

1. From the Scheduled column, select applicants by checking the box next to their name.
2. After selecting the applicants, from the drop-down click 'Interview'.
3. A pop up module appears. At the top you can select a data, start time, end time, and location.
4. Under the left column, mark the applicants you would like to schedule for the interview.
5. Under the right column, select from the list of interviewers. By default it shows you the active and available interviewers that were indicated in Setup. Check the box next to the interviewer name to select the interviewer.
6. Click Save in the pop up interview module. Applicants now appear in the interview section, shaded in light blue.
7. Click Save again in the Event page.

To edit a Private Event:

1. From the calendar view, click the Event.
2. Click 'Edit' in the top right, edit fields in the left column, such as name, details, start and end date, duration, schedule and waitlist slots.
3. Click in the Applicants column to schedule or waitlist.
4. Click in the Scheduled column to add a time or pair an applicant with an interviewer or remove an applicant from the event.
5. Click 'edit' in the Interview section to add interviewers, change the time or location.
6. After you have made all changes, click SAVE.

To mark an applicant as a 'No Show' (Applicant must be paired with at least one interviewer first):

1. On the calendar view, click the Event the applicant was scheduled for but did not show.
2. Click 'Mark as No Show'. (Note: An applicant must be in the Interview section in order to mark them as no show)
3. Click 'Save'.

The applicant is now marked as no show for the event and in the applicant details section in the Scheduler.

To mark applicant(s) as invited (Invited Privately Status) for a private event:

1. On the Applicants view, mark the boxes next to the applicant(s) names.
2. Click the drop down under the Applicant Name search
3. Select “Mark as Invited Privately”
   Note: To unselect this status for applicants, repeat these steps and select “Un-Mark as Invited Privately”

To mark an applicant as “Interviewed”:

1. On the Applicants view, mark the boxes next to the applicant(s) names.
2. Click the drop down under the Applicant Name search
3. Select “Mark as Interviewed”
   Note: To unselect this status for applicants, repeat these steps and select “Un-Mark as Interviewed”

To Remove Applicants from a Private Event:

1. From the Scheduled or Waitlisted column, select applicant(s) by checking the box next to their name.
2. After selecting the applicants, from the drop-down click 'Remove from Section'.
3. Click 'Save'.

RSVP Events

Applicant Self-Scheduler rules:

- An applicant can only self-schedule themselves for one interview date OR waitlist themselves for any number of dates, regardless of how many invitations you send the applicant.

- Program users have full control over their interview dates when using RSVP Events. You can schedule, waitlist, remove applicants, and decline applicants as you wish; however, you will be required to send an update to the applicant when making a change to their interview status.
- All schedule slots must be filled before applicants can waitlist.
- If the freeze date has passed, the applicant can no longer self-schedule themselves for that date. If they are already scheduled for the date, they can cancel the date; however, will not be able to reschedule for a future date. Programs will receive a message that the applicant has cancelled and choose whether to schedule the applicant for a future date.
- An applicant can decline an interview. If they decline the invitation, they will not be able to schedule themselves for an event unless the program unmarks the applicant's declined status.

Applicant Responses:

- When an applicant schedules, waitlists, or declines a RSVP date, their response will appear in both the Responses section and the applicant count will change on the event in the Calendar section.

Note: You cannot un-send an invitation to an applicant, but you can remove an applicant(s) from a specific event.

To create an RSVP Event:

1. From the calendar view, click and highlight the interview date(s) from the calendar
2. Click 'New Event' from the top left drop down.
3. Under 'New Private Event', check the box 'RSVP Event'.
4. On the left side, you will find each date you have selected listed in row(s). Each row indicates a Private Event being created.
   Note: Duration can be: All day event, AM, or PM. Specific times when sending a message to applicants.
5. To add more dates to the event, click 'Add Date'.
6. Set a Freeze Date.
   Note: Set the number of days prior to each interview day an applicant must schedule/waitlist themselves by. Once a freeze day is selected, it cannot be changed. Each interview day will have its own freeze date. (Freeze day of 0 will allow the applicant to schedule themselves up to 11:59 PM ET the day before the interview date.)
7. Enter in a Name (required) and details, if necessary.
8. Select the number of schedule and waitlist slots.
9. In the top right, select 'Save' or 'Save and Invite Applicants'.
   - Click 'Save' at any time you can come back and add applicants and pair them with interviewers.
   - Select 'Save and Invite Applicants', takes you where you can invite applicants to the event(s).

To continue and invite applicants to an RSVP Event by clicking 'Save and Invite Applicants' or 'New Invitation' from the calendar:

Note: You can create any number of events with schedule slots and invite all applicants to those events or only invite some applicants to certain events.

1. Enter in an Invitation Name. (The name is only for the Program. Applicants will not be shown the name)
2. Enter a Subject and Message Body. (There is a Message Template drop down if you have saved templates.)
3. Add attachments, if needed.
4. All applicants who have the status 'Selected to Interview' will show up in the Applicant section.
   Note: You can search for an applicant, filter by interview status or change the number of applicants in your view. You will also notice that applicants selected will pop up at the top. You can remove them by clicking the 'x' next to their name or unchecking the checkbox.
5. In the right column, select the events that you would like to send to the applicants
   Note: You can search for an event, filter by event status, or change the number of events in your view. Events selected will pop up at the top. By default, the events that you have just created are selected; check the boxes to add more events. You can remove them by clicking the 'x' next to the event or unchecking the checkbox.
6. Click 'Send Invitation'.

To schedule or waitlist applicants for an RSVP Event:

1. From the calendar, select a RSVP Event to pair applicant(s) and/or to add interview details (time and location)
2. From the Invited column, select applicant(s) by checking the box next to their name.
3. After selecting the applicants, from the drop-down click 'Move to Scheduled' or 'Move to Waitlisted'. Applicants now appear in the Scheduled or Waitlisted columns, shaded in light blue.
4. Click 'Save' in the top right.
5. A pop-up appears alerting you that a message must be sent to applicant(s). There is a default message that will be sent to the applicant. You may add/edit text as you wish.
6. Click “Confirm”.

To Pair Applicants with Interviewers and Add Interview-specific time/location:

1. From the calendar, select a RSVP Event to pair applicant(s) and/or to add interview details (time and location)
2. From the middle of the page, click the purple **‘Add Interview’**button.
3. From the top of the page, select the desired interview [start and end] time.
4. Under the **‘location’** box, click the drop-down arrow to select a **location**.
5. In the left column, **select applicant(s)** to add to the interview by clicking the box next to their name(s).
6. In the right column, **select interviewer(s)** to add to the interview by clicking the box next to their name(s).
7. Click the **‘Save’** button.
8. From the upper-right corner, click the **‘Save’** button.
   Note: The event must be saved from ‘Add Interview’ and ‘Event Page’.

To mark an applicant as a 'No Show':

1. On the calendar view, click the Event the applicant was scheduled for but did not show.
2. Click 'Mark as No Show'. (Note: An applicant must be in the Interview section in order to mark them as no show)
3. Click 'Save'.

The applicant is now marked as no show for the event and in the applicant details section in the Scheduler.

To mark an applicant as “Interviewed”:

1. On the Applicants view, mark the boxes next to the applicant(s) names.
2. Click the drop down under the Applicant Name search
3. Select “Mark as Interviewed”
   Note: To unselect this status for applicants, repeat these steps and select “Un-Mark as Interviewed”

To Remove Applicants from an RSVP Event:

1. From the Invited, Scheduled, **<u>or</u>** Waitlisted column(s), select applicant(s) to remove by clicking the box next to the applicant(s) name.
   Note: Applicants cannot be removed from Invited, Scheduled, or Waitlist columns in a single action. You must remove applicants in one column and then ‘save’ before removing applicants in another column.
2. Click the purple drop-down arrow.
3. Click **'Remove from Event'**.
4. In the upper-right corner, click **'Save'**.
5. A pop-up appears alerting you that a message must be sent to applicant(s). There is a default message that will be sent to the applicant. You may add/edit text as you wish.
6. Click 'Confirm'.

Deleting an RSVP Event:

1. Click the **Event** from the calendar view.
2. In the top right corner, click the **red delete** button.

3. A pop-up appears alerting you that a message must be sent to applicants. By default, any scheduled and waitlisted applicant(s) will be notified. It is optional to notify invited applicants that have not scheduled or waitlisted.