

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

Deanna Bailey, Cat Bailey, Mackenzie Frost





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”



Deanna Bailey

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

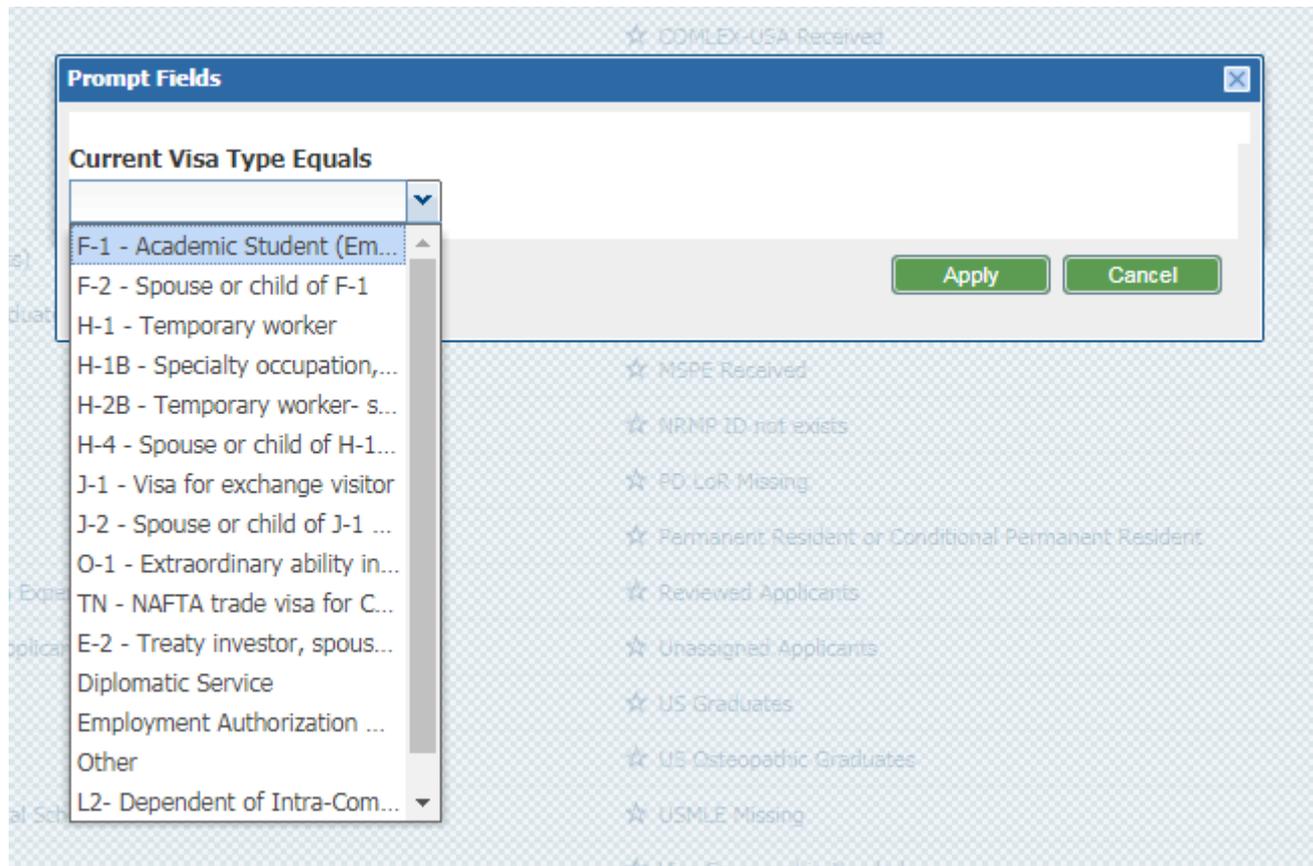
“Prompt fields”

- 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

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
☆ Applicant Applied Date	☆ Applicants (excluding Osteopathic) Missing USMLE Transcripts
☆ Applicants Assigned	☆ Applicants Not Reviewed
☆ Applicants Reviewed and Not Selected to Interview	☆ Applicants Scheduled for Interview
☆ Applicants Where Date Reviewed Precedes Date of Latest Document	☆ Applicants with No US or Canadian Residency
☆ Applicants with US or Canadian Residency	☆ Canadian Graduates
☆ COMLEX-USA Missing	☆ COMLEX-USA Received
☆ Composite Score	☆ Current Visa Status
☆ Dept. Chair LoR Missing	☆ Dept. Chair LoR Received
☆ Foreign Graduates	☆ Interview Date(s)

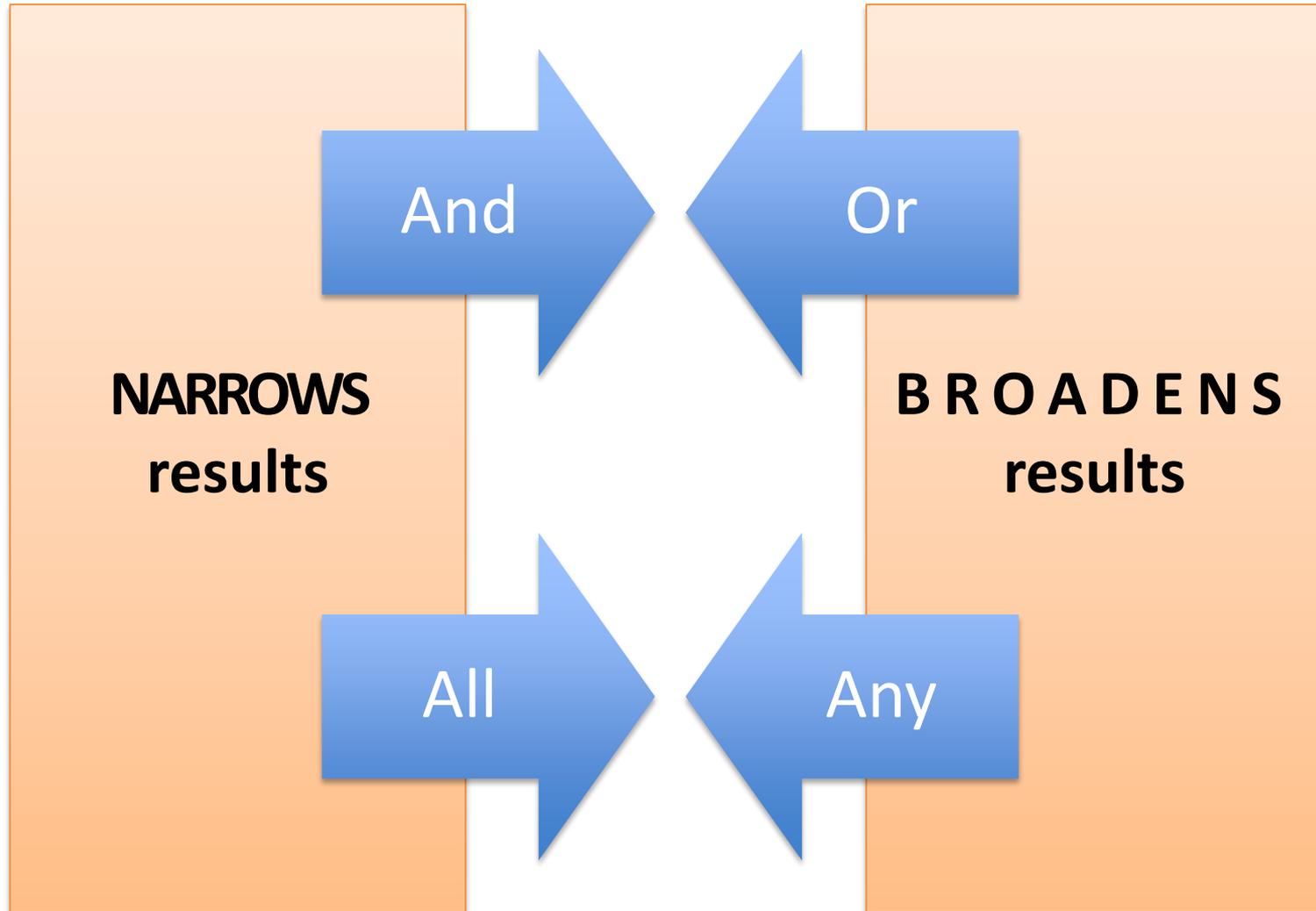
Example of a prompted filter



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



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”



Cat Bailey

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!

RSVP
— PLEASE REPLY —

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 export



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.





Screen shot online help community site?

ERAS PDWS User [SETTINGS](#)

COMMUNITY HOME DISCUSSION **1.7K** **LIBRARY 31** EVENTS **0** MEMBERS **52.7K**

31 Entries

  [CREATE NEW LIBRARY ENTRY](#)

FOLDERS

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

FOLDER CONTENTS

[New](#) [View](#)

-  Medical Eduaction 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?

Deanna Bailey Deanna.Bailey@UTSouthwestern.edu

Cat Bailey Cat.Bailey@UTSouthwestern.edu

Mackenzie Frost Mackenzie.Frost@UTSouthwestern.edu

