Making ERAS work for you

(Beyond the basics)

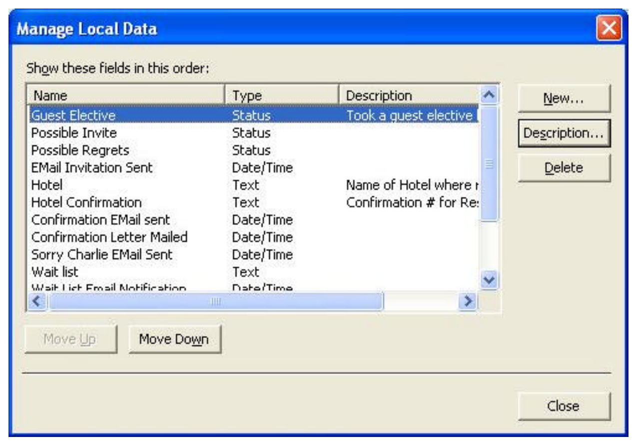
If you've used ERAS for your application season, you've probably mastered the basics; collecting mail from ERAS Post Office, checking boxes in the status listing, such as: Reviewed,
Hold, Invited, Scheduled for Interview, Inactive, or Withdrawn. You've also learned how to maneuver within ERAS, going from screen to screen, or finding a specific applicant. And if you've been brave, you've probably exported files out of ERAS to use with your Word Processor or spreadsheet.

Useful tips

Here are some useful tips to making ERAS work harder for you, and an explanation of how to use them.

Local Data fields

The first tip is using the Local Data Fields feature. Although ERAS has tried to incorporate all the fields that programs want for their applications, there are a few that *I* need for keeping track of *MY* applicants that aren't included. So they've included a feature called 'Local Data Fields' for just that purpose. These fields can then be used to filter, and can be exported when you export applicant files. Keep in mind that if a catastrophe happens and you have to ask ERAS to re-transmit all your files, these fields were kept <u>locally</u> and won't be in the re-transmission (yet another reason to back up files).

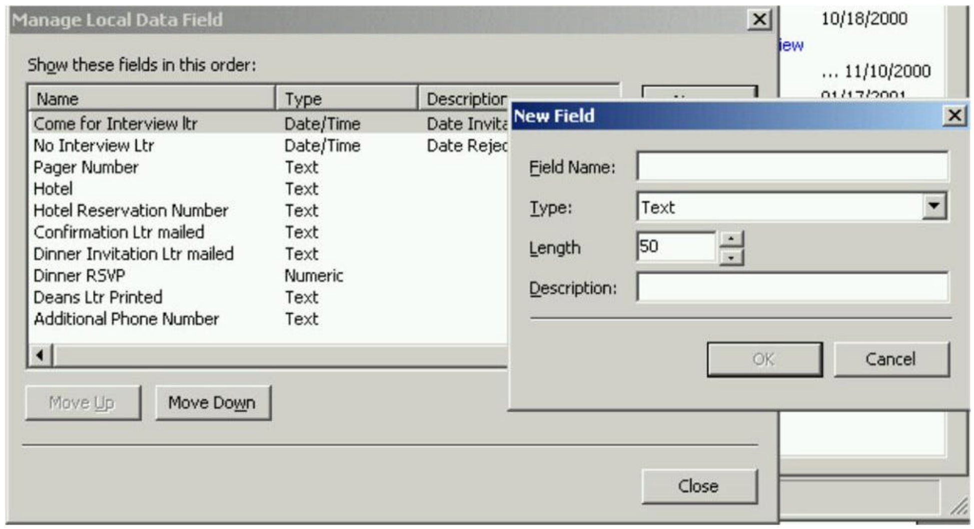


You can add local fields as the need arises. Perhaps an applicant notifies you they will be on an away rotation for the month and any correspondence should be directed to this temporary address. Where would you add that to your ERAS database? The Local Data Fields would be a good place. Typically you need to keep track of not just when a decision was made, but also when the applicant was notified of that decision (Invited, rejected, sent confirmation letter, etc.) That can be kept in the Local Data Fields area.

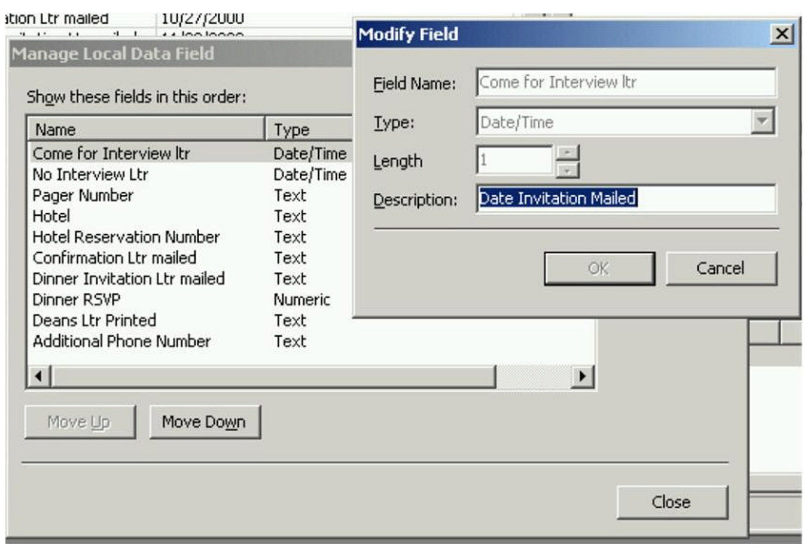
To create a new field, select either <u>T</u>ools from the menu bar, and then <u>M</u>anage Local Data Field, or click on the icon that looks like a triangle with a pencil.
The 'Manage Local Data Fields' window opens, and if this is your first venture into creating your own data fields, there won't be any fields already in the window. You'll want to select New from the choices on the right side of the window. This will open up 'New Field' window, and you're simply

going to give the field a name, decide the type of field it will be, and give a brief description if the name is too cryptic.

You can see some typical fields listed in the background (Come for Interview ltr, etc.) If you're going to sort the information, then you need to decide the type of field it will be. Text fields are typical, but if the field is something such as the date a letter was mailed, then select Date/Time as the field type. It's simple, later, to create a filter to select only those applicants who have been scheduled for interview but not yet mailed a confirmation letter, for example.



If you realize after a field is created that you need to give a more detailed explanation, you can rename the description for existing Local Data Fields. Once again you select "Manage Local Data Field" from the menu bar, select your field, and click on 'Description'. You cannot modify a field you've created. If necessary, you can delete it and create a new one with the modified information.



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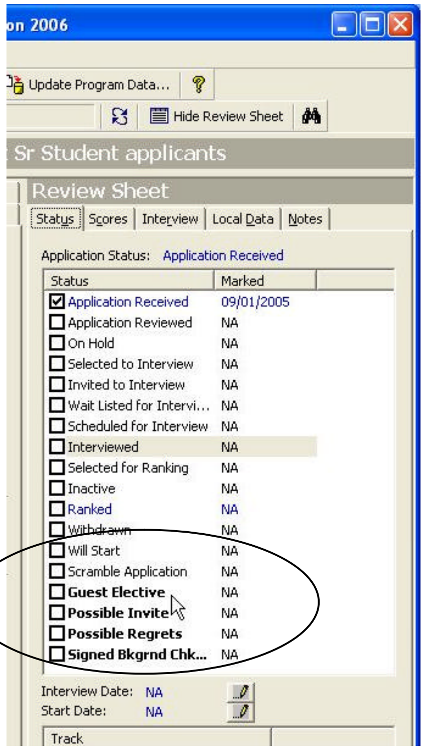
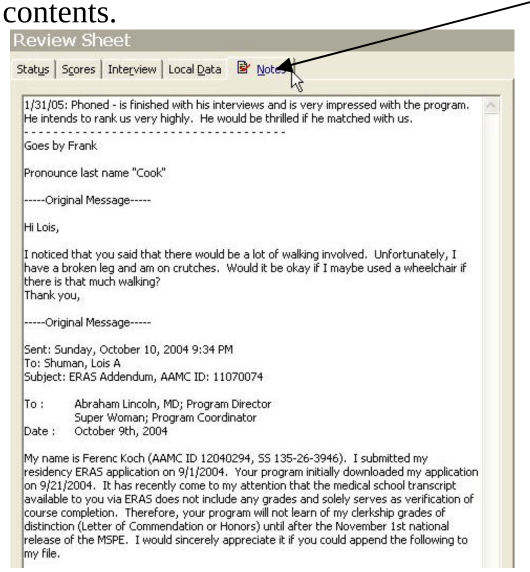
Tip: If the Type of ‘Status’ is selected, those local data fields will appear on the Review Sheet.



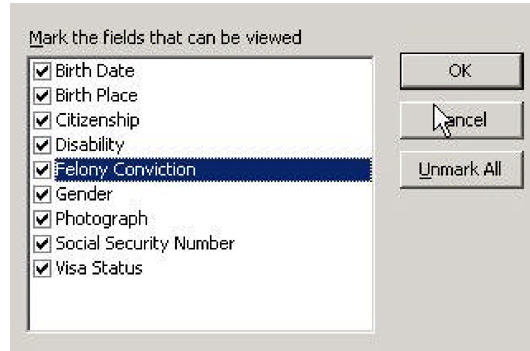
Notes Page

Like having a scratch pad at your side, the Notes Page allows you to jot notes about an applicant. It might be a phone message, or a cut and pasted e-mail message, or comments from your current residents about the applicant. A red checkmark appears at the tab of the Notes Page when it has any contents.



Filters – ERAS and Data Filters

ERAS Data Filters

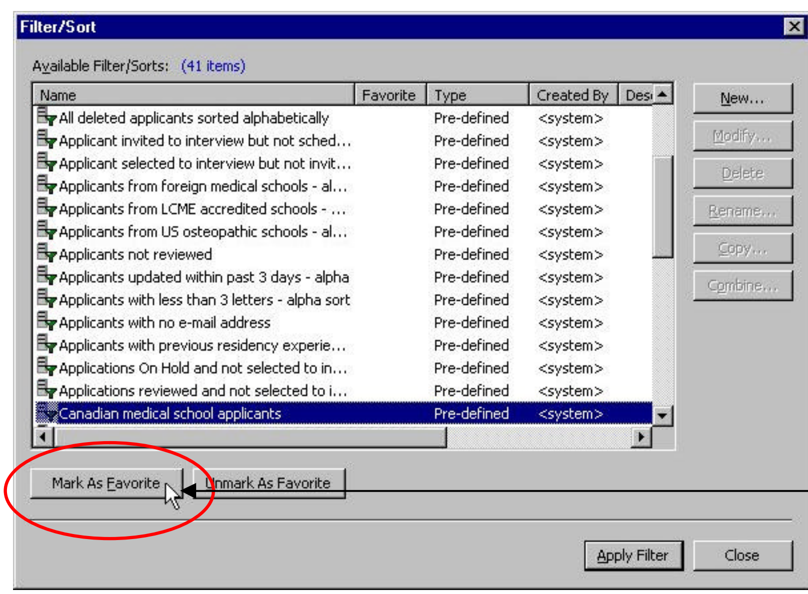


There are some Equal Opportunity-type filters built into ERAS, that can be turned on or off. When you first open ERAS, you will be asked which filters you want to keep turned off (meaning you won't see those fields). These are categories that might be sensitive if you were to select applicants based on these items (gender, race, age, photo, etc). ERAS tracks which settings you have selected, the date you made those selections, and any future changes you make to those selections. They do not report that information elsewhere, but it is stored with a date stamp in your system. If you change any of the selections at the beginning, or if you make the changes later, you are reminded that these changes will be recorded with the days' date.

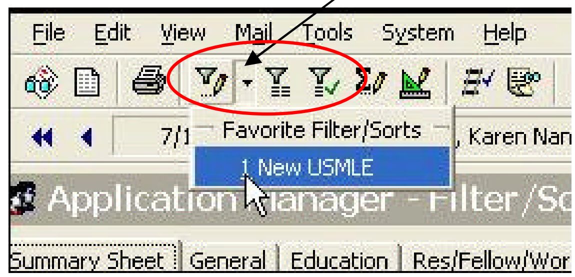
Filters/Sorts

Filters are very powerful tools when using ERAS. Filters help you sort through the bulk of applicants to find the group with which you want to work. Each year, more are added by ERAS, based on suggestions by the users. There are some that you may need that aren't already created for you. There won't be in any built-in filters for the local data fields you've just created, for instance.

To use a filter, simply select Tools, Filter/Sort. Scroll through the list of available filters and click on the one you want. Double clicking on the name of the filter will apply it, or you can click on the Apply Filter button after selecting it. Only those applicants meeting the criteria in the filter/sort will be displayed. (for example, Applicants Not Reviewed).

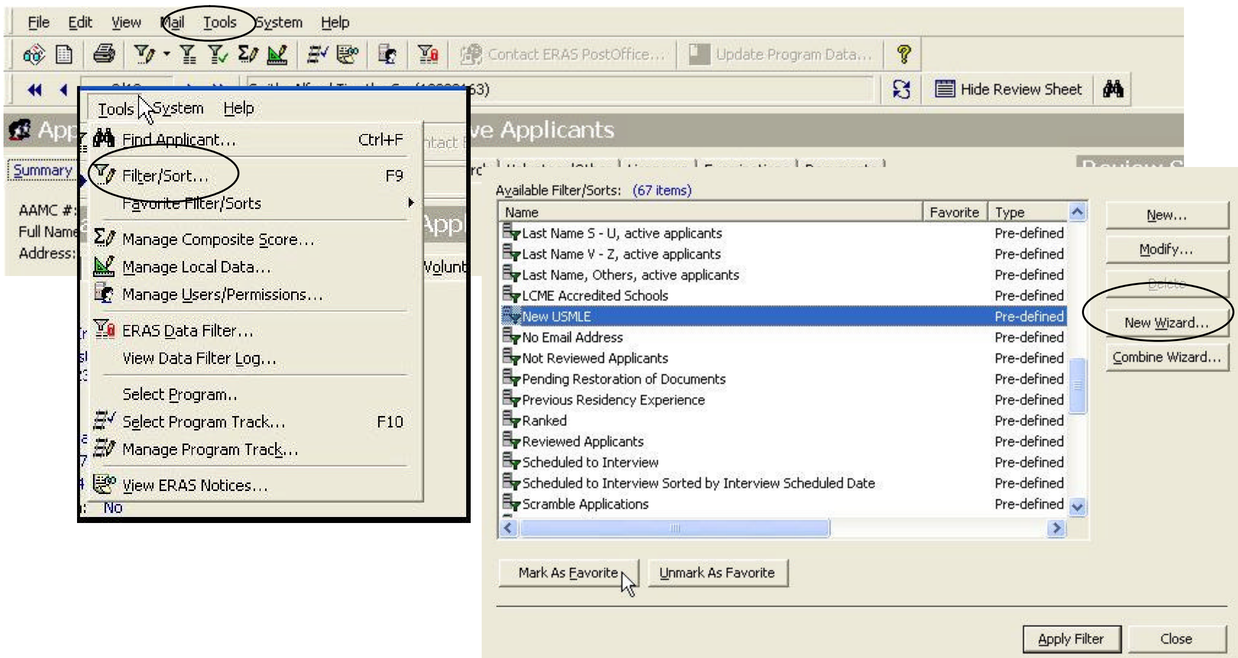


There will be favorites that you refer to frequently during the season, and what is frequently used at the beginning will be different from what is used the most often at the end of the season. Mark a favorite by simply selecting the filter, then clicking on the "Mark As Favorite" button (or unmark, if no longer needed so frequently). You will then be able to click on the little arrow between the two funnels (on the icon bar) to have your favorite list drop down.

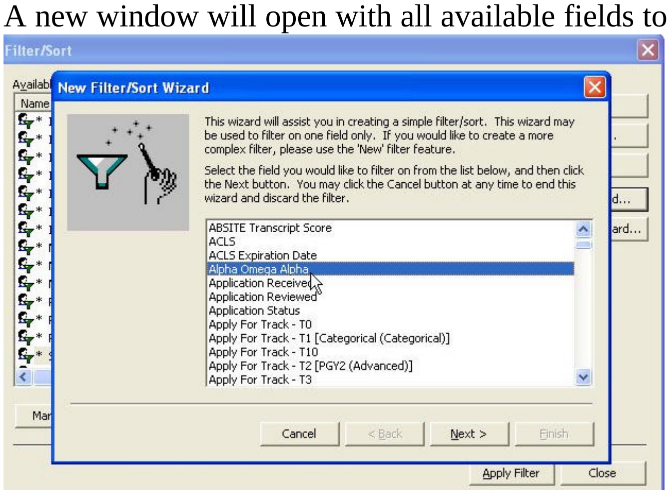


New Filter/Sorts (Wizard method)

To create a new filter/sort, select Tools, Filter/Sort, and click on New Wizard.

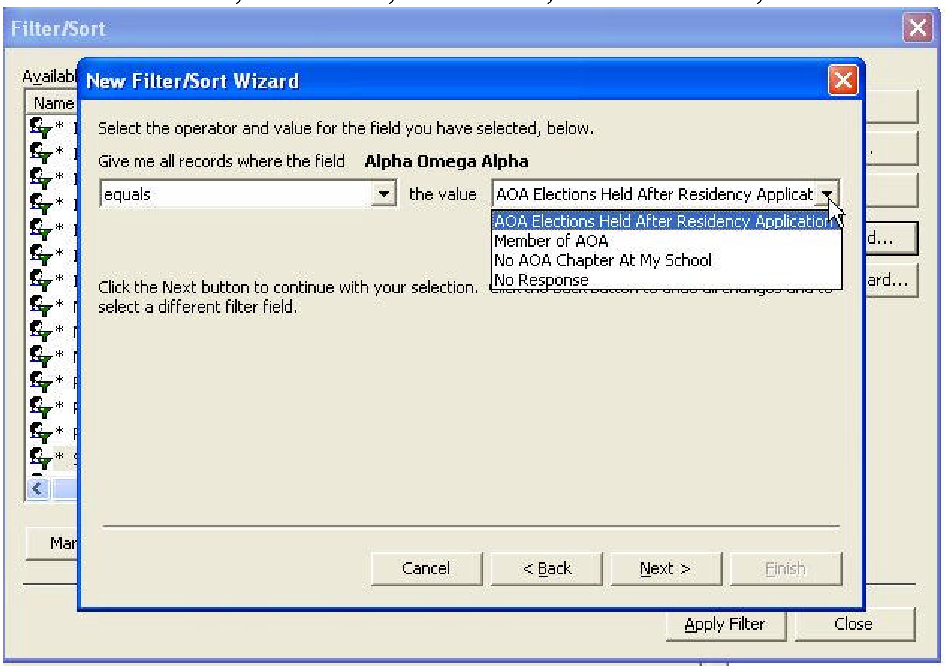


A new window will open with all available fields to select (which item to filter in or out)

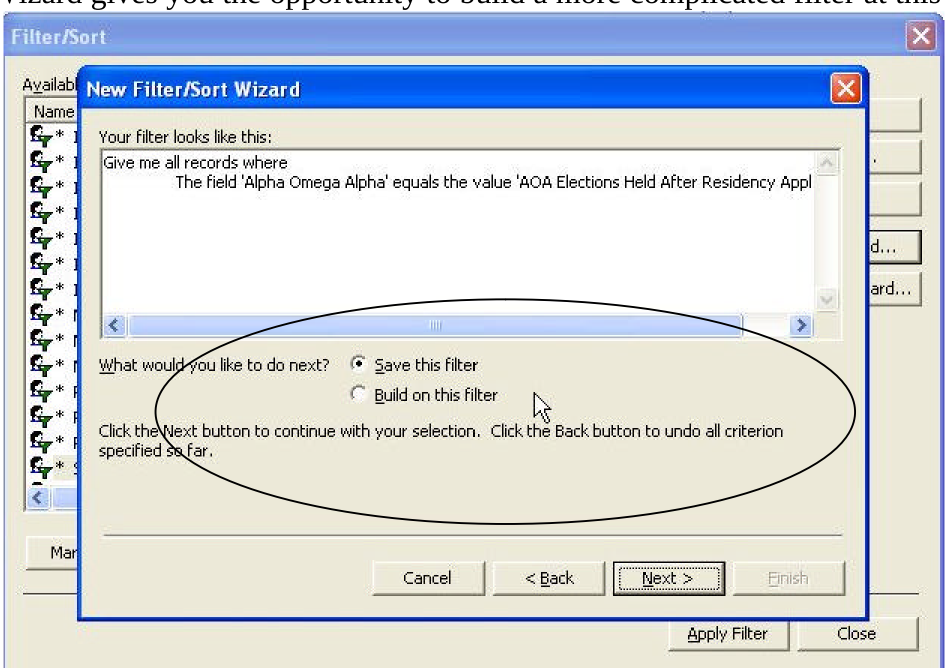


Select the desired field and click on ‘Next’.

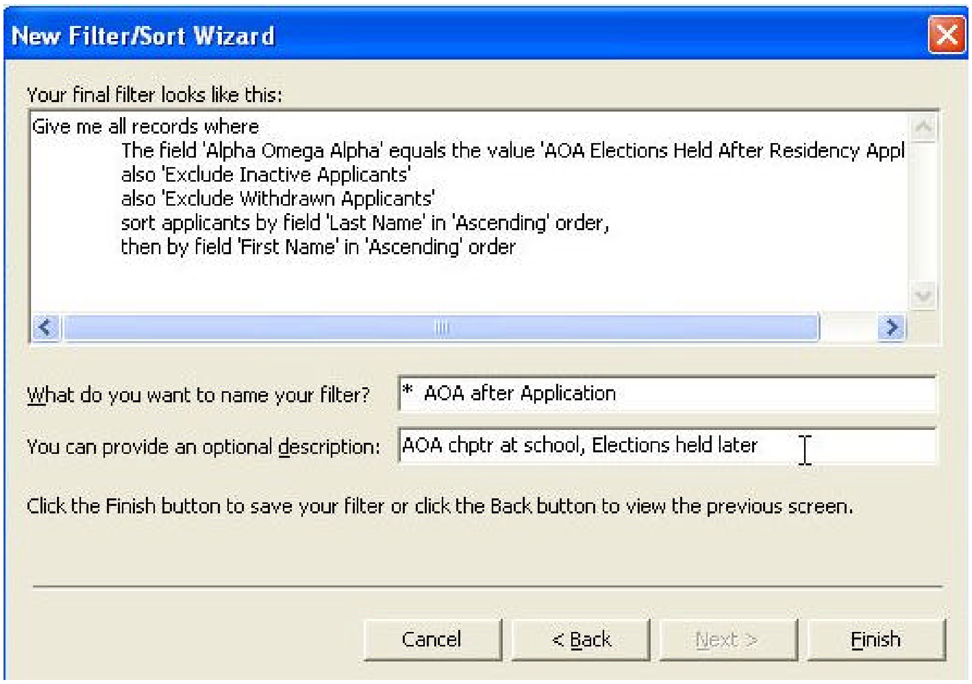
The criteria for filtering appears in a new window. This choice varies depending on the type of field it is – a true/false field, a text field, a date field, a numeric field, etc.



Select the choice you want, and click on ‘Next’. You are nearly finished if this is a one-field filter. The Wizard gives you the opportunity to build a more complicated filter at this point.

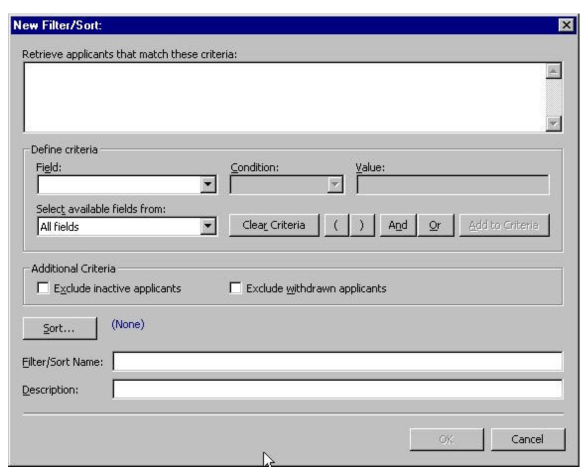


The next screen asks if you want to exclude inactive or withdrawn applicants. It begins by having them checked to exclude, but if you want to include them, you can remove the checkmarks. Then you are given the opportunity to sort the filtered applicants. You might want them in alphabetical order, or by medical school, or any of the other fields available. Perhaps you have multiple applicants with the same last name; in this case you can sort by Last Name, and then by First Name (so Alice Smith would be listed before Walter Smith). The choices for each sort category are ascending or descending order (A-Z or Z-A). Finally you are presented with the filter you are building, and have the opportunity to give it a name. So that your personally created filters will be quick to find, you will most likely want them at the top of the listed filter/sorts. To do this, put an asterisk (*) and perhaps a space before the name you give the new filter/sort. You have a second line to give a longer description of the filter.



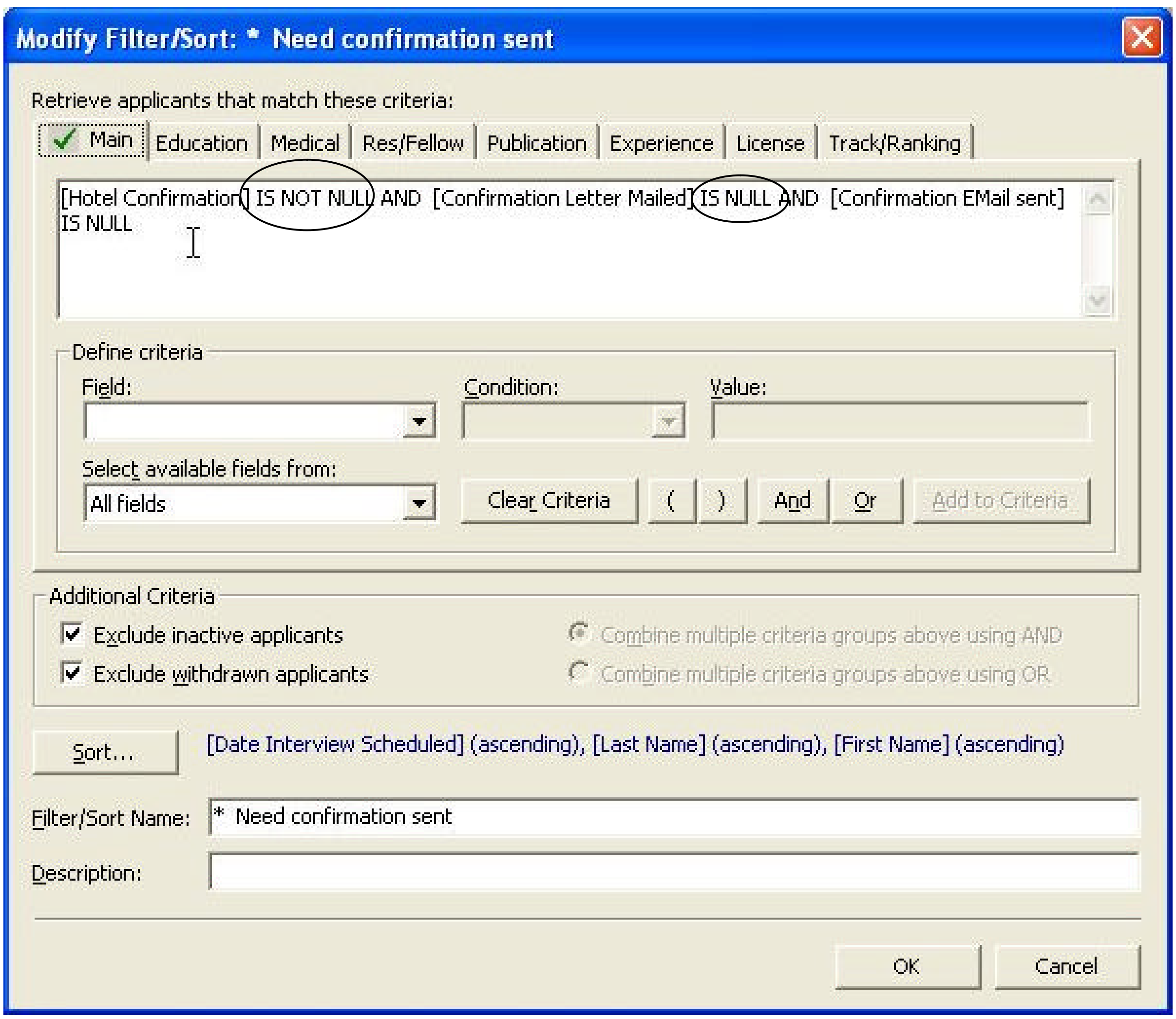
(Skip this next section if you don't wish to create filters without using the Wizard)

New Filter/Sorts (without Wizard)



To create a new filter/sort, select Tools, Filter/Sort, and click on New. Define the criteria for filtering by scrolling through the available fields and selecting the one desired. Decide the condition, and value if appropriate. Click on the 'Add to Criteria' button to include the criteria. If you don't wish to show inactive or withdrawn applicants who otherwise match the criteria, click the buttons beside those selections. Click on the Sort button to sort by last name alphabetically, or by interview date, etc. Name your filter. A suggestion for filters you personally create is to always name them with something that will cause them to be at the top of the list (such as beginning with an asterisk*). Click on the OK button to save your filter. This merely creates but doesn't activate the filter. You need to select it from the list of available filters and click on Apply to see the results.

An example here is the filter for applicants who have been scheduled for interview but you haven't yet mailed their confirmation letter. This will use a local data field that you will have created, called Confirmation US Mail Sent (or Confirmation Email Sent). Since it the actual date for interview doesn't matter, we only need to give it a condition of 'Is Not Null', and since the actual date for mailing the confirmation doesn't matter, we only need to give it a condition of 'Is Null'. Note that the Sort category has more than one thing listed. Notice the asterisk and space in the Filter/Sort Name. By using those, the filter would be listed before any of the built-in filters, as an asterisk is alphabetized before a letter and none of the built-in filters had asterisks in their names.



Let's walk through the steps in making this filter, since it's really a 3-part filter.
1) Select the field [Date Interview Scheduled]. A condition must be chosen, and we click on 'Is Not Null'. At this point click on 'Add to Criteria' to have the correct wording appear in the upper window.

2) Before adding a second part, click on the button that says 'And' to have that word appear in the correct part of our filter.
3) Because the second and third parts are really together, we'll group them -- separate from the first phrase -- with parenthetical marks. Click on the left parenthetical.
4) Next, select the field [Confirmation US Mail Sent], choose the condition 'Is Null'(meaning is empty), and click on 'Add to Criteria' to have the wording added.
5) Again, click on the 'And' button to have that inserted into the filter.
6) The last part of the filter criteria is the e-mail field, so select [Confirmation Email Sent] from the list of available fields in the drop down menu, choose the condition 'Is Null', and click on 'Add to Criteria'.
7) Finally, finish the group with a right parenthetical, by clicking on that button. Click on the 'Sort' button to select how you want the list to appear. Give your new filter a name. I suggest placing something such as an asterisk and perhaps a space at the beginning of the name, so that it will be listed at the top of your filters. Clicking on the OK button saves the filter. It does not apply the filter. The new filter will be highlighted in the list, so you can click on apply at this point (to see if there's any applicants in the list)

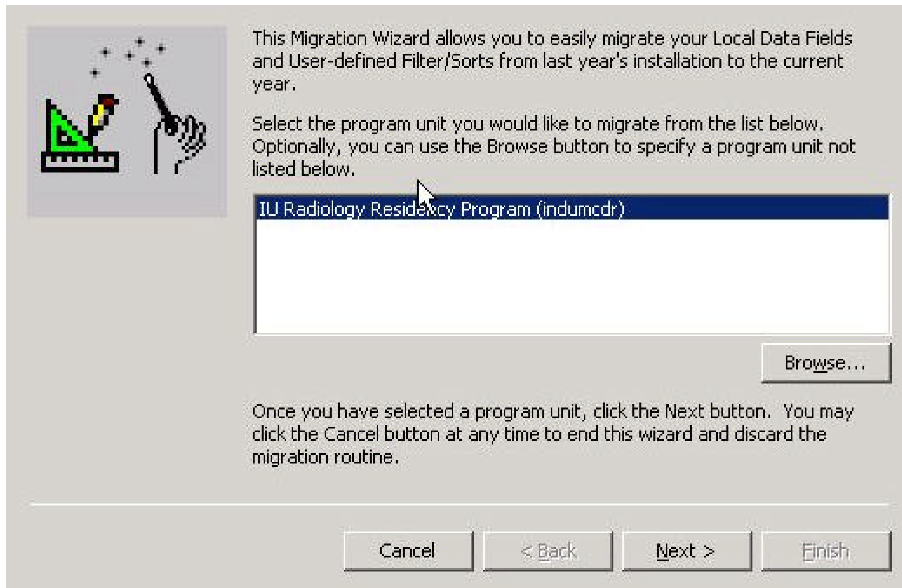
You are allowed to modify the built-in filters, but then are required to give them a different name. The list of filters also has some information such as 'Pre-defined' or 'User defined'.

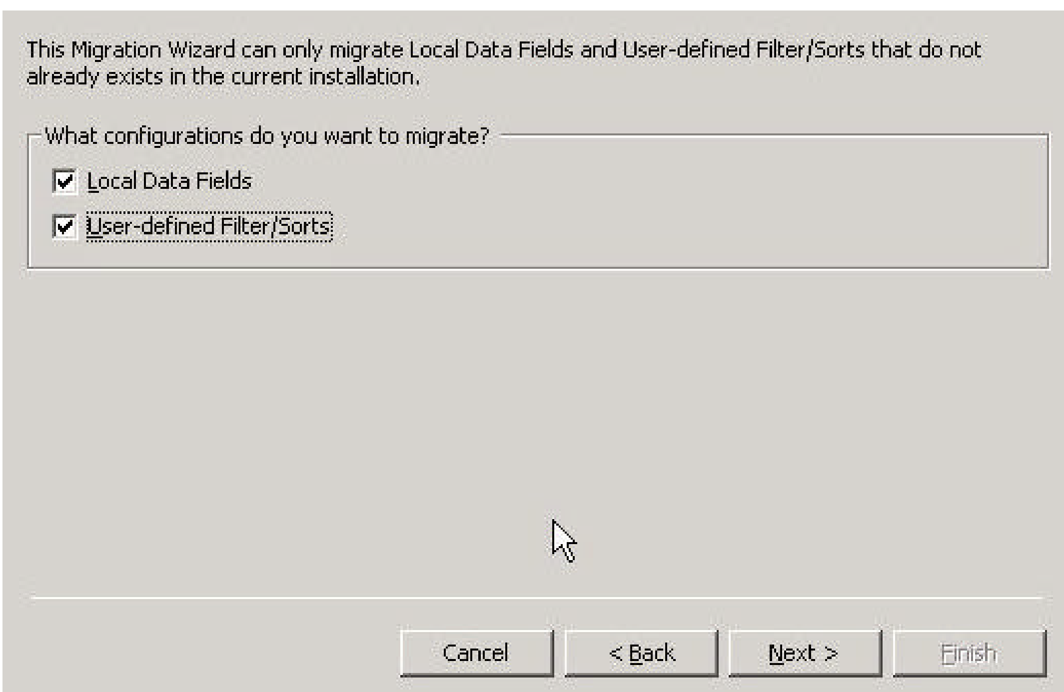
One that I've created and used each year is a filter to find just those applicants from my own school, since that's something my faculty always wants to know (all through the season). When creating that filter, the 'Condition' will be a drop down menu, with all the schools listed *of those applicants currently in your ERAS database*. It won't give you a list of all the medical schools in the world. If, when you create it, you don't yet have any applications from your own students, then you won't be able to list that school as your condition. This is possible if you create the filter/sort very early in the season. Just try again a little later.

Another set of filters I've created both for my own use and also for the use of our faculty interview committee is for individual interview dates. I create one filter for each interview date, and by applying the filter, only those applicants scheduled for interview on that date will appear. Since our department is on a network and our ERAS program is on the computers of our entire interview faculty, they can easily review the files in their office beforehand. (This is the sixth year I've used these filters, and it's worked better in each succeeding year.)

Migration Wizard

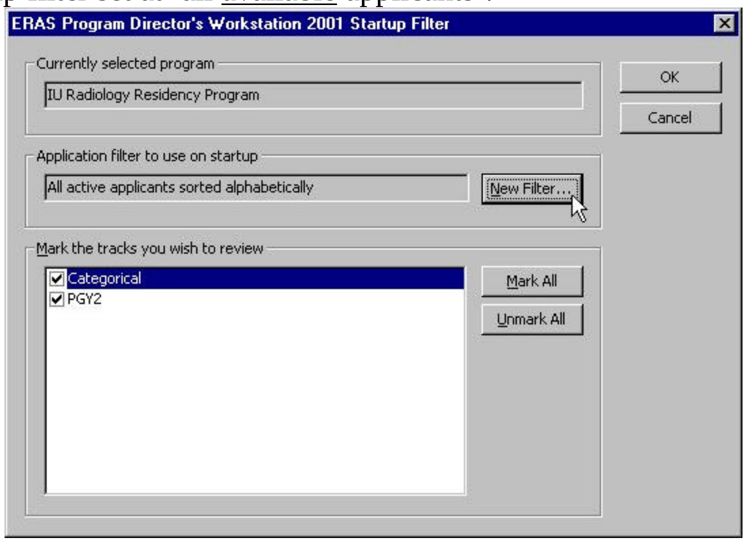
Rather than re-create all my custom filter/sorts AND local data fields each year, ERAS has included a MigrationWizard. *WARNING*: Last year's ERAS application must still be on the computer until you've migrated the filter/sorts. If last year's program and files have already been removed, the new ERAS program cannot find the old Filter/Sorts.





Startup Filter

When you close ERAS, the filter/sort you had last applied will be saved as the startup filter the next time you open it. For this reason, during the interview season, I would deliberately go to the Filter/Sort of the next interview day before closing ERAS, so that if any interview faculty opened ERAS at their computer they would automatically see only those applicants they would be interviewing. You may want to leave the startup filter set at ‘all available applicants’.

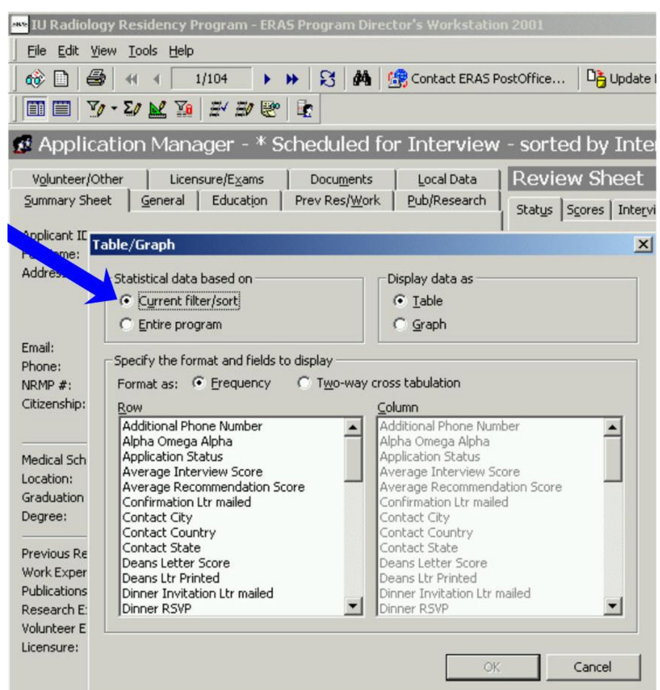


Exporting

The exporting feature in ERAS allows the user to merge letters with addresses in a word processing program, or save just the matched applicants into a resident database, or create some statistical tables of selected groups of applicants. This is covered in detail in another handout.

Tables & Graphs

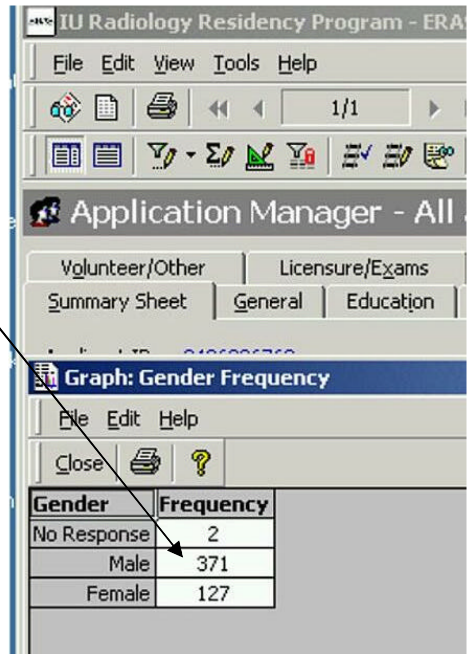
If your faculty want to know ‘How many <fill in the blank> are applying to our program this year?’ as mine sometimes do, you can quickly find this information (without having to go through each file and make a hash mark on a scrap of paper) by utilizing the Tables & Graphs feature. First, be sure to have the appropriate filter/sort applied (All applicants or only those from your school?). Then, go to File, and select Table/Graph.



The window allows you, at this time, to select the Entire program or the Current filter/sort. You can display the data as a table or graph, and have the choice of ‘Frequency’ or ‘Two-way cross tabulation’. You may select up to two fields.

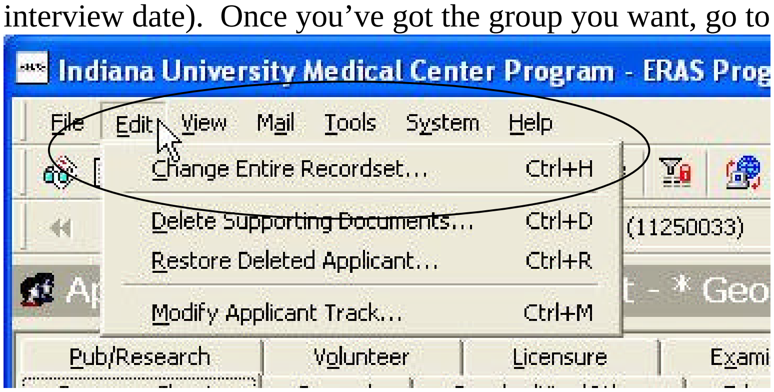
If the question asked is 'How many women are applying to the program', then you would choose Table/Graph, and Entire program, Table, Frequency, and highlight Gender. Clicking the OK button would give you a table with the number of Male, Female, and No Response gender applicants to your program at the present time. Note: *You must have the 'Eras Data Filter' set to show gender for the Table/Graph feature to offer that field.*

You can then copy [i.e., to a spreadsheet] or print out the table. In past years, this feature would allow you to display statistics for either your local program, or for your specialty nationwide. The last few years, the only information available was for your current program.

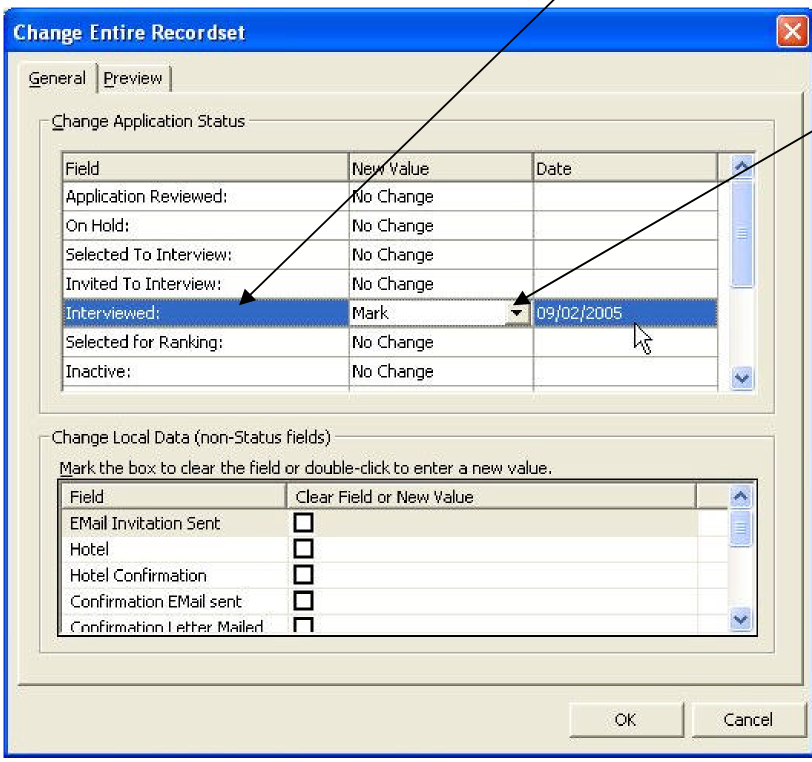


Changing Entire Recordset

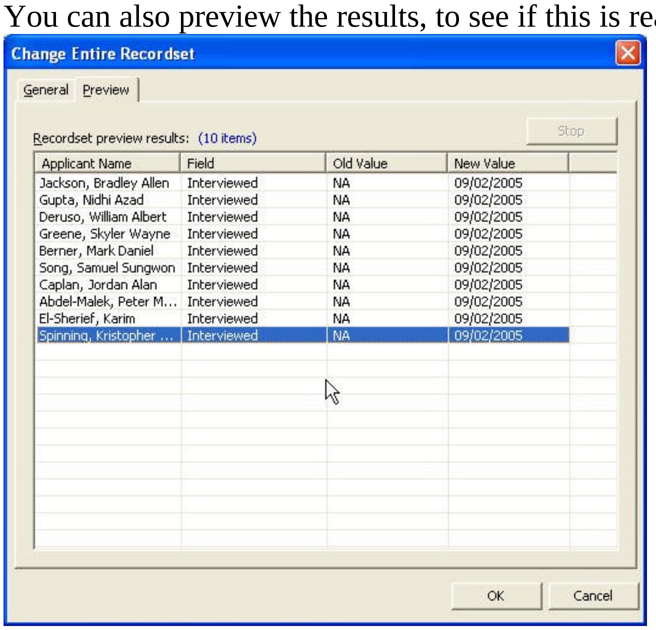
Sometimes you want to quickly change every applicant's file in a recordset. An example might be if everyone scheduled to come for interview actually came that day (as we always hope will happen). On the Review Sheet there is a box beside 'Interviewed', and you can go to each record and click on that box. There is a quicker way and that is to change the entire recordset. Caution: This action will literally change every record in that filter/sort. This year there is a mechanism to preview your results and make changes before applying (or canceling) the change. It is more efficient if you've got a filter/sort to select the group of people you need to work with (such as a filter/sort for a specific interview date). Once you've got the group you want, go to Edit, Change Entire Recordset.



Choose the field that you want to change -- "Interviewed" in this case. There is a field for 'New Value', and a date field. You can edit the date field with a calendar that pops up if today's date is not what you want in that field.



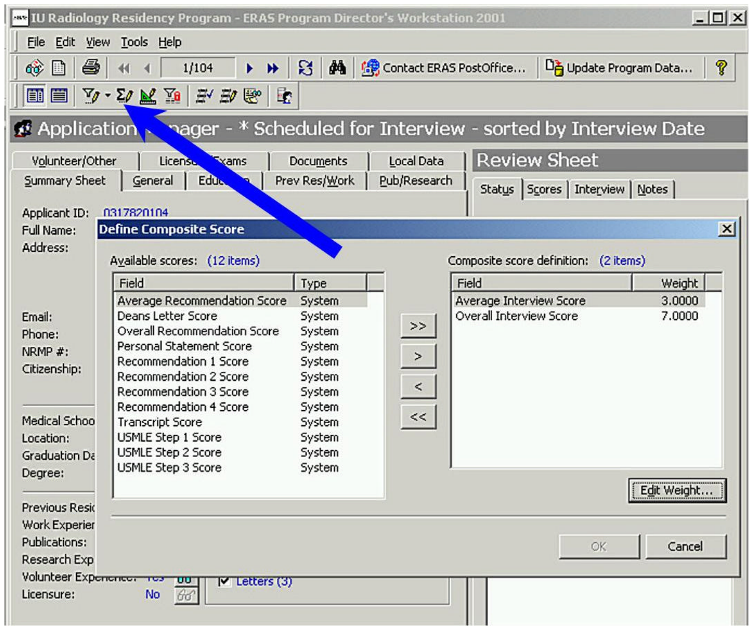
You can also preview the results, to see if this is really what you wanted to change.



Another use for changing the entire recordset would be to click on the 'Selected for Ranking' field for everyone interviewed that day (if they <u>were</u> selected for ranking).

Scoring

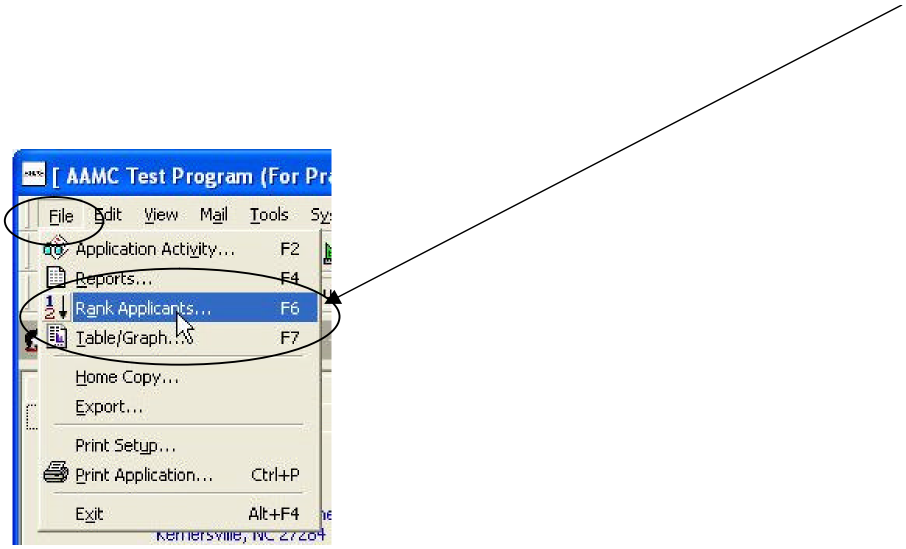
ERAS has built-in scoring mechanisms that can be used throughout the season, if desired. Scores can be given to separate components of the application, the individual interviewers, and the overall interview score. These can be assigned different weights, and a composite score will be calculated based upon the weights and individual scores. This can be used to create an initial rank of your applicants. Although at our program we didn't give scores to the Dean's Letters, for instance, we *did* use this for entering the interview scores our faculty gave on the day of interview. We used these scores for creating our initial rank list, and only wanted to modify slightly on the ranking day. The default weight to any score is 1 (or 100%) unless you define the score weight. The best way to decide how to use this is to try it out – you can change things around however often you need.



Ranking

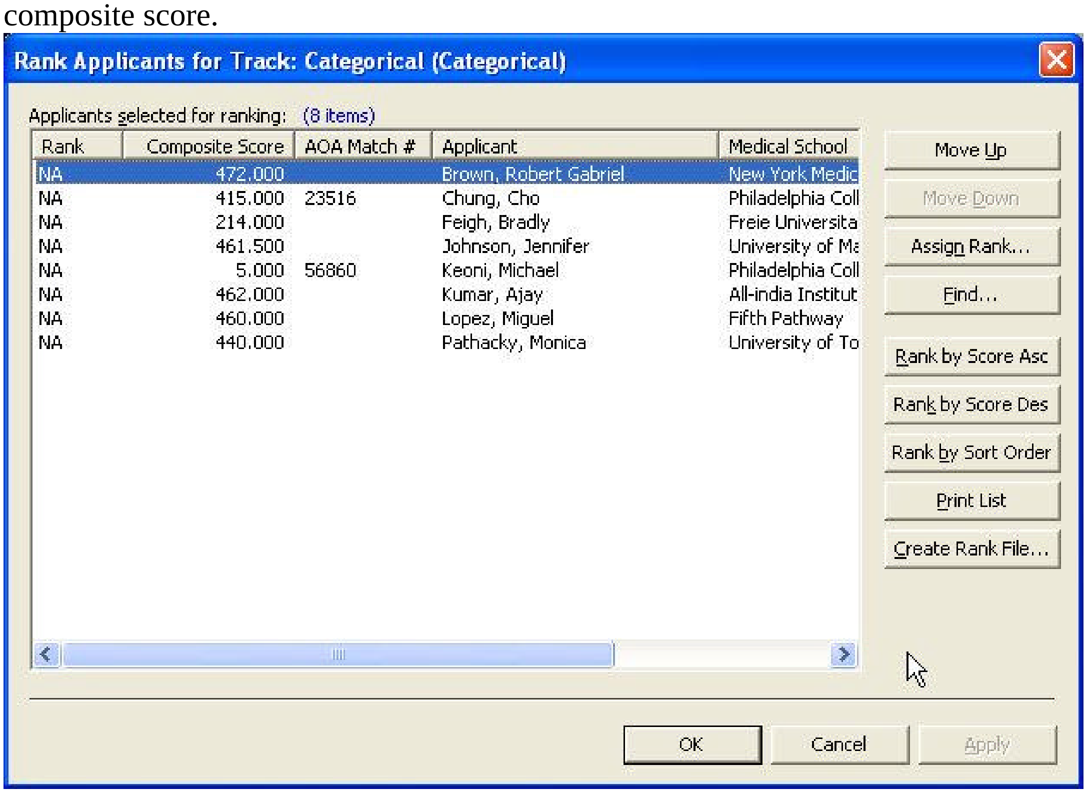
At the end of the season you can create your rank list while still within ERAS. First, be sure that every applicant being ranked has the 'Selected for Ranking' checked on their Status sheet.

Once all desirable applicants have been 'selected for ranking', then go to File, Rank Applicants.

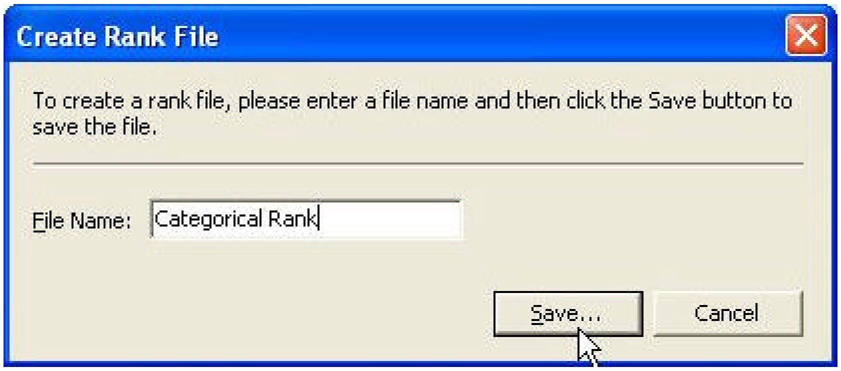


If you offer more than one track (perhaps Categorical, or Preliminary, or Advanced) you will be asked to select the track.

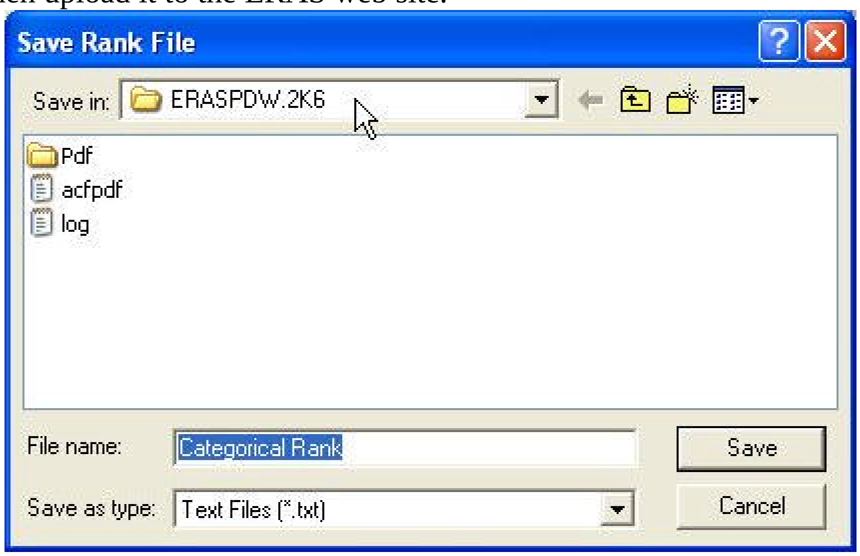
If you have used the Scoring method, the applicants will automatically be listed based on their composite score.



While you are in this section, you can move an applicant up or down or to a specific number. When finished, click on one of the 'rank' buttons – either Rank by Score Ascending (or Descending) if you have no changes, or Rank by Sort Order if you've rearranged quite a bit. Check over your list to be sure it's correct. You can also print out the list. When you have everyone in the order that you want, you can create a rank file.



This file will be saved as a text file (*.txt) in your ERAS Program Director Workstation on your local hard drive (ERASPDW) . You can then upload it to the ERAS web site.



Note: ERAS is willing to work with programs, and they ask for suggestions at the end of each season. If you have a suggestion to add to the 'Wish list', or a problem or a gripe, they want to know. There is a survey available at their web site. Go to http://www.aamc.org/eras/ and browse.

ERAS Tips –
Some tips jotted down while at ERAS training:

Exporting numbers that might begin with a zero - in text import wizard specify that those fields are Text instead of General. (Applicant ID, NRMP #, & Zip Code)

Home Copy - not to be loaded back on the computer where the Program came from

Notes field - checkmark on "Notes" tab if not blank

Data filter - ERAS does not control how we use the data; they merely pass on information collected

If filter is created BEFORE data filter is turned on/off, it will still work. If filter is created AFTER data filter is turned on/off, that field will not show.

New way: The information is stored in PDWMain.mdb (in local computer)- ERAS would be able to extract for you if a legal case were in question.

Export - if planning to use in Word, save as .Doc file

Filter conditions
old: is null /is not null
new: is empty /is not empty

Local data fields
Types:
Date/Time
Numeric
Score (preferable for short #s) - can be included in composite scoring !
Text
Can change entire record to update local data field