

2026

# ERAS

Program Director's  
WorkStation (PDWS)  
USER GUIDE



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## Welcome

Welcome to the Program Director's Workstation (PDWS) User Guide. The PDWS is used by programs to evaluate residency and fellowship applications. This is done by reviewing application materials, sending messages, generating reports, and ranking applicants. A ranked list of applicants can be created to send to the National Resident Matching Program® (NRMP®), the National Matching Service (NMS), or another entity.

## Getting Started with PDWS

The first step to using PDWS is becoming familiar with the main areas of the program.

- Dashboard - Landing Page.
- Applications - Display individual applications and attached documents.
- Rankings - Compare and rank applicants.
- Reports - Generate and view reports.
- Setup - Manage users and set program defaults.
- Program Messages - Display sent and received messages.

## Understanding the User Interface Terminology

Below is a list of frequently used terms throughout the PDWS User Guide.

- Tabs - A standard Windows control that provides navigation between different screens or sections of information.
- Panel - A delineated area within a screen that groups information or functions. There can be multiple panels on a screen, and panels can also be nested.
- Tabbed Panel - A panel that contains a collection of tabs.
- Header - A panel that continually displays specific data fields, even though the data itself may change.
- Light Box - A secondary, moveable, pop-up window that allows users to perform a command, asks users a question, or provides users with information or progress feedback.
- Table - Data organized in columns (fields) and rows (records).
- Drawers - Additional fields or functions revealed (or hidden) using a toggle inside a panel.

## Choose Level (Toggle)

The Choose Level feature allows users to view data for a specific program within their institution. Institution Super Users are also able to view data at the institution level. After logging in to the PDWS, select the institution under the Dashboard to view the Choose Level dialog box. Users will automatically be prompted to choose a level when logging in for the first time. Narrow down the data to the specific institution or program by selecting an Institution, Program, and Specialty from their drop-down menu.

To Change the Level to View:

1. Click the Institution or Specialty name on the bar under the main navigation.
2. Select the level of information to view from the drop-down lists.
3. Click the Continue button.
  - a. The relevant data is now available.
  - b. Institution level users must first toggle to a Program level in order to see any Program specific tabs (e.g., Applications, Scheduler, Rankings) and Program-related choices under the Setup tab.

## Application Review Process

The main goal of PDWS is to create a list of applicants, called the Ranked Order List (ROL), to send to the National Residency Matching Program (NRMP), the National Matching Service (NMS), or another entity. Several tasks are performed before the ROL can be created:

1. Step 1: Find Applicants to Interview.
  - a. Receive applications for available positions.
  - b. Sift through the applications with the goal of finding the desired applicants to interview for each position.
  - c. Use the Manage Filter tools to identify applicants that meet specific criteria.
2. Step 2: Schedule the Interviews.
3. Step 3: Evaluate Applicants.
  - a. After the interview is complete, enter comments and scores.
  - b. Enter Document scores.
  - c. Various attributes defined by the program should be flagged.
  - d. Enter in Reviewer notes and scores.
4. Step 4: Rank Applicants.
  - a. Create a ranked list of applicants to send to the appropriate matching organization.

## Roles and Permissions

The PDWS has pre-defined roles with associated level permissions that can be assigned to program users and others. Each role determines what tasks the user can perform within the PDWS.

- Permissions are privileges granted to a user to perform specific actions within the PDWS.
- Roles consist of a set of permissions for a given type of user within the PDWS. There are two main categories of user roles:
  1. Super User Roles.
    - a. Institution Super User.
    - b. Program Super User.
  2. Program User Roles.
    - a. Program Coordinator.
    - b. Reviewer\_Interviewer.

## Super Users

Super User roles include two permission levels: Institution Super Users and Program Super Users. These roles have the most control over the PDWS and how it is setup.

### Institution Super User (ISU)

The Institution Super User and Alternate Institution Super User can create and modify institution and program super users access. An Alternate Institution Super User cannot assign or revoke an Institution Super User role.

Task Permissions for Institution Super Users:

- Set up Program Super Users.
- Manage Users.
- Manage Screened Data.
- Set up Data Filters.
- Authorize Residency Management System (RMS) for programs.
- Update program listing and contact information.
- Update ERAS® Participation.
- Create, edit, and delete Track information.
- Update all Data Filters.

### Program Super User (PSU)

The Program Super User and Alternate Program Super User manage setup tasks to enhance the client experience in using the PDWS.

Task Permissions for Program Super Users:

- Assign and revoke user roles.
- Send data to Thalamus.
- Create attributes.
- Define scores and weights.
- Add and edit statuses.
- Set up the ranking comparison tool.
- Modify certain data filters.
- Update program listing, and contact information.
- Update ERAS Participation.
- Create, edit, and delete Track information.

The Program Super User has all the system task permissions given in the Program Coordinator role.

**Alternate Super Users** can designate other users as Alternate Program Super Users, but otherwise have the same permissions as a Program Super User

## Program Users

Program User roles have more limitations than Super Users. There are three levels of Program Users: Program Coordinators, Interviewers, and Reviewers. Each of these roles is divided into the following levels:

- Program Coordinators 1 and Reviewers\_Interviewers have read and write access to the PDWS, allowing them to view information and make changes. Program Coordinator 1 can invite new users. Reviewers\_Interviewers can only see the applicants to whom they are assigned or scheduled to interview.
- Program Coordinators 2 and Reviewers\_Interviewers Read-Only are limited to only view information in the PDWS. They can use filters to find and view applicants and can view selected reports. However, these users cannot mark statuses, etc. Reviewers\_Interviewers Read-Only access can only see applicants to whom they are assigned.
- Reviewers\_Interviewers Limited Access can only see applicants to whom they are assigned, have limited access to their documents, and cannot access system or user-defined filters.

Note: Program Super Users and Program Coordinator 1 users can assign applicants by using the Assign Applicants option available in the Applications page. Applicants can also be assigned as a bulk action from the View Applications page.

### Program Coordinator 1

A Program Coordinator has similar roles as a Program Super User.

Task Permissions for Program Coordinator 1:

- Set up Attributes, Scores, and Weights.
- Send data to Thalamus.
- Set up the Ranking Comparison Tool.
- Filter Applicants.
- View/Print Applications and Reports.

### Reviewers\_Interviewers

All Reviewers\_Interviewers see only the applicants who have been assigned or scheduled to them. These users can only view the Reviewer or Interviewer comments/scores they entered.

Task Permissions for Reviewer\_Interviewer:

- Update Applicant Statuses and Attributes.
- Review and Score All Applicants.
- Enter and Manage Notes.
- Create Reports.
- View/Print Applications, and Ranking Reports.
- Update Applicant Statuses and Attributes.
- Enter Comments and Scores.

## Reviewer\_Interviewer (Read-Only)

Task Permissions Reviewer\_Interviewer (Read Only) for:

- View Applicant Statuses, Scores, and Attributes.
- Apply Saved Filters.
- View Notes.
- View Data Filters.
- View/Print Applications.

## Reviewer\_Interviewer (Limited Access)

Reviewer\_Interviewer Limited Access has a restricted view of the application and cannot view transcripts or Board Scores. A Reviewer\_Interviewer Limited Access can view their Schedule and enter Review or Interview Scores and Comments.

Task Permissions for Reviewer\_Interviewer LimitedAccess:

- Update the status of an application.
- Update attributes that were created during pre-season setup.
- Enter a note regarding the applicant and view comments made in response to their note.
- Add document scores and custom scores (if they exist).
- View and print reports from Current Results for one or more applicants.

## Program Management

This role is primarily used to grant access to the Dashboard, Program Management tab, and Program Information section in Setup.

Task Permissions for Program Management:

- Update program listing and contact information.
- Update ERAS Participation.
- Create, edit, and delete Track information.
- Update Program Characteristics and Application Requirements.

## Dashboard

After logging into the system, each user lands on their dashboard. The dashboard provides an overview of application activity and important ERAS or PDWS notifications. The panels displayed will depend on the user's role.

Note: During SOAP® (Supplemental Offer and Acceptance Program®), SOAP® participating programs will see a message stating SOAP participation and additional information.

### Stats Panel

The Stats panel shows statistics for Applications Received, Applications Reviewed, No Longer Under Consideration (Applicants marked with the following application statuses: Withdrawn by program/applicant, & Inactive applicants), and Total Applicants Active.

## Application Activity Panel

The Application Activity panel shows the number of changes per document that have taken place within a specified date range. Click the applicant name to view the application or click the Printer icon to view a PDF listing more detailed activity.

## Favorite Filters Panel

The Favorite Filters panel displays the filter(s) each user has marked as favorite(s), indicated with a star icon. Click a filter name to run the filter and display results. The name and date of the last filter applied appears above the list of filters. The View button displays the results of the last filter applied, and the Refresh button runs the filter again to incorporate new data or changes.

## Reports Panel

The Reports panel displays a list of reports chosen to display from Setup.

## Screened Data Panel

The Data Filters panel displays data items which can be screened (hidden) or viewable during the application process. Click the Manage Data Filter icon located in the upper right corner of the panel to navigate to Data Filters in Setup. Program super users have the option to modify 6 screened data fields, and institution super users can update all 13 screened data fields. This will apply to all applicants.

## Quick Links:

| Quick Link Name                       | Quick Link Navigation Details                                      |
|---------------------------------------|--------------------------------------------------------------------|
| <b>Manage Filters</b>                 | Filters sub-tab under the Applications tab.                        |
| <b>PDWS User Guide</b>                | Opens the PDWS User Guide in a new browser tab.                    |
| <b>Job Aids &amp; Training Videos</b> | Resource Libraries on the PDWS Communities site.                   |
| <b>Contact Support</b>                | Contact ERAS Support form and ERAS Support contact information.    |
| <b>PDWS Terms and Conditions</b>      | Opens the PDWS Terms and Conditions window.                        |
| <b>About</b>                          | Direct link to Access User ID, Unit ID, Toggle Info, and Filter ID |

## Applications

When the Applications tab is selected, the first applicant from the last filter ran displays. The At-a-Glance panel details information about the applicant, and directly below the header are eight tabs:

Personal, Geographic Preferences, Education, Experience, Publications, Exams/Licenses, Limiting Factors, and Documents.

Note: SOAP participating programs will see additional SOAP fields along with an orange indicator next to the applicants who applied to the program during SOAP. There will also be an additional indicator next to the tracks the applicant applied to during SOAP.

Use the Applications tab to:

- View an application and all related documents.
- Run or create filters to view applicants that meet specified criteria.
- Identify the status of the application.
- Enter information to evaluate the applicant as the workflow progresses.

## Header and At-a-Glance Panel

The Header panel provides information about the applicant, such as their AAMC ID, the date the application was received, the most recent medical school, the most recent residency. This section also includes the status for data authorized to Thalamus for Core and Cortex along with the date the data was authorized and the authorized user. This section provides an overview of the data authorized for Thalamus in both the Core and Cortex systems, including the dates on which each authorization was granted. It offers detailed information regarding the specific data and the corresponding authorization dates for both systems.

The At-a-Glance panel provides information about Statuses, users assigned to the applicant, tracks considered by the program, and the track(s) applied by the. Program Super Users or Program Coordinator(s) 1 can update tracks by using the edit link next to Tracks considered by Program.

## Status Types

An applicant's location in the selection process is determined by their status. There are four status groupings:

- Application Status.
- Ranking Status.
- Custom Status.

You can create any type of user-defined grouping status from the Setup tab. All statuses are filterable.

To Update a Status for One Applicant:

1. Click the pencil icon next to Statuses on the At-a-Glance section.
2. Select any of the appropriate statuses that will save the changes with the date and time stamp.
  - a. To update statuses for multiple applicants together, use Bulk Actions after you run a filter.

## Application Status

The application status indicates where the current application stands in the overall process. Program Super Users, Alternative Program Super Users, Program Coordinators 1, Reviewer\_Interviewer, and Reviewer\_Interviewer Limited Access can update all application statuses except for:

- Withdrawn by Program - This action will prompt you to confirm this status change for applicants who have been scheduled and/or ranked.
- Withdrawn by Applicant - this action takes place in the MyERAS® system and is updated in the PDWS.

## Ranking Status

The Ranking status indicates whether the applicant has been selected to be ranked or has been ranked. There are two status types for ranking:

- Selected for Ranking - This status must be changed on the applicant header or on the Scheduler tab. When this status is chosen, the applicant's name becomes available for ranking in the Rankings module.
- Ranked - Once an applicant is assigned a rank number within the Rankings module, the applicant will automatically be marked with the Ranked status.

## Custom Status

Custom statuses can be created in Setup.

Note: Status values that are triggered by the system cannot be changed, including Withdrawn by Applicant and Ranked.

## Assigned Applicants

All Reviewers\_Interviewers users can only view applicants whom they are assigned. Reviewers\_Interviewers and Reviewers\_Interviewers Read-Only can run system and user-defined filters, but the Reviewers\_Interviewers Limited Access users do not have access to filters.

Program Super Users and Program Coordinators 1 can assign applicants by using the Assign Applicants option available in the Applications page. Applicants can also be assigned as a bulk action from View Current Results page after running a filter.

### To Assign One or More Users to an Applicant:

1. In the At-a-Glance panel, click the pencil icon for the Assigned To row.
2. Select the user(s) to assign to the applicant.
3. Click the X button to save the selections and close the light box.
  - a. Note: The Reviewer\_Interviewer users will now gain access to the applicant's application when they log in to the PDWS.

## Applicant Tabbed Panel

The Applicant tabbed panel is divided into six tabs to help short-list the applicant pool.

| Tab Name                    | Details                                                                                 |
|-----------------------------|-----------------------------------------------------------------------------------------|
| <b>Personal</b>             | Summary and general information including screened information.                         |
| <b>Geo Preferences</b>      | Applicant's Division and Setting preference.                                            |
| <b>Education</b>            | Applicant's educational background.                                                     |
| <b>Experience</b>           | Applicant's work experience, including volunteer, research, and work experience.        |
| <b>Publications</b>         | List of applicant's publications.                                                       |
| <b>Exams/Licenses</b>       | List of exams taken by applicant along with a list of licenses received.                |
| <b>Limiting Factors</b>     | Misdemeanor/felony question.                                                            |
| <b>Documents</b>            | Applicant's documents and local documents uploaded by the program.                      |
| <b>Additional Questions</b> | Specialties participating in the specialty questions pilot can access the answers here. |

## Documents

The Documents tab displays documents received from the MyERAS system, the designated dean's office, and national boards. Use the Document panel to upload local documents for a specific applicant.

A local document is any document not included in the MyERAS application but may be required by the program. For example, programs interested in research may ask applicants who have published peer-reviewed articles to provide a copy of the article before or during an interview. Keep in mind attached local documents will need to be printed individually and will not be included when printing an applicant's application.

### To Add a Local Document:

1. In the Actions tab, on the applicant details page, click Upload Local Document.
2. Locate and select a file from the Choose File to Upload window.
3. After attaching a file, the document upload confirmation will appear.

### To View a Local Document:

On the Documents tab, scroll to the bottom and click the name of the document to view the file. Keep in mind local documents will not be included when printing the applicant's documents to PDF or in Archive files.

### To Remove a Local Document:

1. In the Applicant Details on the Documents tab, click the trash icon.
  - a. Click anywhere in the row, but not the document name. If the document name is clicked, the document will open.
2. Click Delete to confirm.

## Evaluate Applicant Panel

This tabbed section holds information about the applicants as they move through the evaluation process. This panel consists of 3 expandable tabs:

- Scores.
- Attributes.
- Communication.

### Interviews

An interviewer evaluates an applicant after they have been interviewed. Interviewer comments and scores may have a significant impact on the final ranking. Based on roles, different system permissions are available when entering Custom Scores into PDWS.

- Reviewer\_Interviewer and Reviewer\_Interviewer Limited Access can enter, modify, and view only their own scores for interviews they conducted.
- Program Super Users, Alternative Program Super Users, and Program Coordinators 1 can enter, modify, and view scores for all of the interviewers in their program.

*Interviewer Tasks (performed by Reviewer\_Interviewer and Reviewer\_Interviewer Limited Access):*

- Enter and publish a score to the interview.
- Update applicant's interview status.

*To Enter Interview Scores:*

1. In the Applications tab, select the Scores tab.
2. Click the box next to the score name to enter a numeric score value.
3. Click outside the textbox to Save.
  - a. Delete the text to remove the scores from the total and average interview score.

### Reviewers

A reviewer evaluates an applicant after they have reviewed the applicant documents. Reviewer comments and scores can get added to the Composite Score calculation and may have a significant impact on the final ranking. Based on roles, different system permissions are available when entering review scores into PDWS.

- Reviewer\_Interviewer and Reviewer\_Interviewer Limited Access can enter, modify, and view their own scores for reviews they conducted.
- Program Super Users, Alternative Program Super Users, and Program Coordinators 1 can enter, modify, and view scores for all of the reviewers.
- All Reviewers only see applicants with whom they are assigned.

*Reviewer Tasks (performed by Reviewer\_Interviewer and Reviewer\_Interviewer Limited Access):*

- Enter review Scores.
- Apply a score based on the review conducted.
- Save the scores.

*To Enter Reviewer Scores:*

1. Select the Scores tab.

2. Select Reviewer Scores or Post-Review Scores.
  - a. PDWS displays the Reviewers based on the assignment information and provides areas to enter score and review notes.
3. Click the box beneath Score to enter a numeric score value.
4. For Post-Review Scores, click the drop-down next to the Interviewer name to open the notes box.
5. Enter notes, up to a maximum of 4,000 characters.
6. Click outside of the box to Save.
  - a. Notes/scores that are Saved are viewable only by the user who entered them (e.g., Reviewer, Program Coordinator).
7. Delete the text from the notes textbox to remove the scores/comments from the total and average Reviewer score.

## Communication

Communication records are used to document any contact with the applicant. There are four types of communication records, and each is associated with an icon: email, Phone, Fax, and Other. Messages sent or received through the PDWS are automatically noted in the Communication tab and cannot be edited.

### *To Sort the Communication:*

- Click a column heading.

### *To Add a Communication Record:*

1. In the Communication tab, click Add Communication.
2. Select the type of communication.
3. Enter the appropriate information.
4. Click the Save button when finished.

### *To Attach a Document to a Communication Record:*

1. While in the Add Communication light box, click Upload File.
  - a. The Phone communication type does not offer an upload option.
2. Locate and select the file to attach.
3. Only one file can be attached to a communication record, and the file type must be .pdf or .jpg.
4. Click the Open button or double-click the file.
5. Select whether the attachment should appear in the Local Documents area of the Documents panel.
6. Click the Save button when finished.
  - a. A paperclip icon indicates the communication has an attachment.
  - b. Attachments can be viewed and printed.

### *To Edit a Communication Record:*

1. Select the record to edit by clicking the subject hyperlink.
2. Click the Edit button.
3. Make the necessary changes.
4. Click the Save button.

*To Delete a Communication Record:*

1. Select the record to delete by clicking the subject hyperlink.
2. Click the Delete button.
3. Click the Delete button to confirm the deletion.

Note: You cannot edit or delete any messages sent to or from the PDWS.

*To Print the Communication History Log:*

1. Select the record to view by clicking the subject hyperlink.
2. Click the Print icon at the top right of the light box.
  - a. A PDF of the report appears in Adobe Reader.
  - b. The Adobe Reader toolbar offers buttons for saving, printing, navigating, and zooming the PDF report. Visit [adobe.com](#) for help on how to use Adobe Reader.
3. Click the Print button.
4. Select the desired print options, then click the Print button.

## Attributes

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

*Examples:*

- A piece of information that is required by a particular state in which the residency is located.
- A list of hotels where applicants will be staying during the interview.

*To Update an Attribute:*

1. Select the desired Attributes sub tab.
2. Enter any relevant information.
  - a. Changes are saved automatically.
  - b. Use the Bulk Actions to update attributes for multiple applicants.

## Notes

Notes are used to share information about applicants. Each note contains a header row that lists the user who entered the note along with the date and time the note was entered. Notes are organized in reverse chronological order with the newest note displayed first. Comments can be entered in response to a note, allowing for a threaded conversation among users.

*To Enter a Note:*

1. In the Applicant Details, click the Notes tab.
2. Click in the "Enter note" text box.
3. Enter a note with a maximum of 4,000 characters.
4. Click the Add button when finished entering the note.
5. Only the first two lines of a note display. Click the more link to expand the note.

*To Edit a Note:*

1. Click the Pencil icon next to the note.
2. Make desired changes.

3. Click the Save button.

#### *To Delete a Note:*

1. Click Trash icon next to the note.
2. Click the Delete button to confirm the deletion.
  - a. All comments associated with the note will also be deleted.

#### *To Respond to a Note:*

1. Click the Reply Icon next to the note.
2. Enter a comment with a maximum of 2,000 characters.
3. Click the Save button.
  - a. Multiple comments can be added to a note.

#### *To Delete a Comment on a Note:*

1. Click the trash icon next to the comment to delete.
2. Click the Delete button to confirm deletion.

## Scores

Scores are a way for a program to apply a numeric value to documents submitted by the applicant. The Scores tab is located on the Applicant Details page.

Below are terms relevant to the Scores panel.

- Score - An assigned numeric value.
- Weight - A method used to give certain scores more or less importance.
- Composite Score - Total of all the scores that were selected to be included in the Scores setup.

There are six default Score type groupings:

- Composite
- Board Scores
- Document Scores
- Interview Scores
- Reviewer Scores
- Custom Scores

Programs can define and configure Score types on the Setup tab.

Note: Document scores and other types of scores cannot be updated using a bulk action.

The PDWS automatically calculates the Average LoR score, the Average Document score, Average Interview score, Total Interview score, and the Composite score.

#### *To Update a Score:*

1. Open the Score subtab to update.
2. In the appropriate row, enter the score and click away from the box.

Note: Hover over the information icon to display the author’s name, title, and specialty based on information provided in the MyERAS application. By clicking on the LoR, the document will open in a PDF.

### *Composite Score*

The composite score is the combination of all scores which are selected in Setup. Score weights and which scores to include in the Composite Score are determined in the Setup menu.

### *Board Scores*

USMLE and COMLEX-USA scores display by default. All board scores are system-generated and cannot be changed. If there is a red indicator next to the Board Scores, please open the USMLE or COMLEX-USA transcript to view important information regarding the applicant’s exam history.

### *Documents Scores*

Document scores relate to the documents submitted by the applicant.

- An applicant can have a maximum of four LoRs, which includes a Program Director letter and Dept. Chair LoR.
- Average LoR and Average Document scores are system-generated.
- ABSITE scores are limited to certain surgical fellowship specialties.

### *Update Document Scores*

Only documents submitted by the applicant’s Dean’s office or Educational Commission for Foreign Medical Graduates (ECFMG) display on the panel. Average LoR and Average Document Value are system-generated; all other scores are entered manually. A user-defined score may be added to the Document Scores in Setup.

### *Interview Scores*

There are two score types displayed on the Interview Scores panel:

- Average Interview Score (system-generated) - Average of interview scores entered by all the interviewers via the Interview.
- Total Interview Score (system-generated) - Total of the interview scores entered by all the interviewers.
- A user-defined score may be added to the Interview Scores in Setup, which can be included in the average and total interview score.

### *Reviewer Scores*

There are two score types displayed on the Reviewer Scores panel:

- Average Reviewer Score (system-generated) - Average of reviewer scores entered by all the reviewers via the Reviewers tab.
- Total Reviewer Score (system-generated) - Total of the reviewer scores entered by all the reviewers.
- A user-defined score may be added to the Reviewer Scores in Setup, which can be included in the average and total Reviewer score.

### Custom Scores

Use the Custom Scores panel to view user-defined score groups. Custom scores are created in Setup, and all the score types added in the custom group are updated manually.

## Send Data to Thalamus

The AAMC and Thalamus application program interface (API) streamlines transfer of program/applicant data between ERAS PDWS and Thalamus products. From the list below, please select either Thalamus Core (interview management) or Thalamus Cortex (application review) to transfer data to either software respectively. To send data to both Thalamus Core and Cortex, separate, additional authorization requests are required and may be completed upon submission of the prior request.

Once authorized, data transfer will occur in the background, and ERAS PDWS and Thalamus products may continue to be used during that time. The speed of data transfer is dependent on the amount of data requested to be transferred and the number of data requests currently being processed by other programs.

Note: The authorize and export process can be completed multiple times to accommodate additional/new applications and no data will be duplicated and/or deleted. Data can also be managed and/or deleted through Thalamus products.

### Bulk Authorize Data to Thalamus

Only users with ISU, AISU, PSU, and APSU roles in PDWS have access to authorize data to Thalamus. After reviewing the applicant's application, it is recommended that programs select the Selected to Interview status to keep track of applicants who are selected to interview. After the status is selected, programs can then filter for the mentioned status to pull the applicants who were selected to interview. Selecting the mentioned status is not mandatory and therefore programs can select custom statuses or filter for additional criteria.

Programs can utilize the Data Authorized to Core and Data Authorized to Cortex filters for filtering Thalamus authorization.

After designating a status to an applicant(s) or building a filter; follow the steps below to transfer data directly to Thalamus in bulk:

1. After signing in to PDWS, click the Filters sub-tab under the Applications tab.
2. Select the system defined filter: Selected to Interview or create a new filter with the necessary information.
3. After your filter has been applied; select multiple applicants or select the checkbox next to Applicant Name to select all applicants.
4. Select the Actions drop-down menu.
5. Click Authorize Data to Thalamus.

- a. A pop-up window will appear with additional information about Thalamus Core and Thalamus Cortex.
6. Choose one of the following options:
  - a. I authorize to send this selected applicant(s) to Thalamus Core.
  - b. I authorize to send this selected applicant(s) to Thalamus Cortex.
7. Click Submit.

#### *To Authorize Data for a Single Applicant:*

1. After signing in to PDWS, go to the applicant whose data you wish to send to Thalamus.
2. Select the Actions drop-down menu.
3. Click Authorize Data to Thalamus.
  - a. A pop-up window will appear with additional information about Thalamus Core and Thalamus Cortex.
4. Choose one of the following options:
  - a. I authorize to send this selected applicant(s) to Thalamus Core.
  - b. I authorize to send this selected applicant(s) to Thalamus Cortex.
5. Click Submit.

Please note that once an applicant's data has been authorized and sent to Thalamus, the authorization status will appear along with each system (Core and Cortex), the date the application information was sent, and who it was authorized by.

## Filters

### Manage Filters

The Filters option on the Applications tab displays existing filters to quickly find applicants who meet a specific set of criteria. The screen is divided into four sections.

- The Favorites panel contains a list of filters that you have marked as favorites.
- The User-Defined panel contains a list of filters that were created by you, by Program Super Users or Program Coordinators. User-defined filters can be deleted if no longer needed.
- The System-Defined panel contains a list of filters created by ERAS staff. These filters cannot be deleted.

If an existing filter does not meet your search requirements, refer to instructions on Creating User-Defined Filters and Modifying Filters.

#### *Mark a Filter as a Favorite:*

1. Locate the filter in the User-Defined or System-Defined sections.
2. Click the star icon next to the filter name.
  - a. Favorite filters are user-specific and will not show as a favorite filter for another user at your program.
  - b. Once the star icon is clicked, the filter displays in the Favorites section in alphabetical order.
  - c. Click the star icon again to unmark the filter as a favorite and remove it from the Favorites section.

*Run a User-Defined or System-Defined Filter:*

1. Locate the filter in the User-Defined or System-Defined sections.
2. Click the name of the filter to run it.
  - a. The Results window will display the filter results.

*Delete a User-Defined Filter:*

1. Locate the filter in the User-Defined section.
2. Click the Trash icon.
3. Click the Delete.
  - a. System-defined filters cannot be deleted.

## View Current Results

The Current Results option on the Applications tab displays the Modify Filter Criteria and Results panels. The Modify Filter Criteria panel offers tools to define the search criteria, and the Results panel displays a list of applicants that meet the defined criteria.

The Current Results option does not automatically update even after the page has been refreshed. You will need to re-run any filter or re-run the All Applicants or Active Applicants filter to update the applicant list.

## Create User-Defined Filters

The first task in creating a new filter is planning and deciding the necessary criteria for extracting the correct group of applicants. When creating a filter, choose between the two options to connect different criteria between groups:

- The AND connector is the default when adding search criteria — it narrows the search results since the applicants must meet all the criteria specified.
- The OR connector must be specified when adding search criteria — it expands the search results since the applicants can meet any of the criteria specified.

User-defined filters can be created from scratch or by starting with criteria from an existing filter. See Modify Filters for instructions on how to add new criteria to an existing filter and save it as new.

### Step 1: Start a New Filter:

1. Click Manage Filters on the Applications tab.
2. Click Add a new filter.

### Step 2: Construct the Filter

1. Choose to run the filter for All Applicants or Active Applicants.
2. Click the Add Group button to add criteria.
3. If necessary, click the delete icons (X) to get rid of any existing criteria.
4. Select the filter relationship of the criteria within the group.
  - a. ALL — This narrows the results. Applicants must meet all the criteria in that group. This is the default option when adding criteria.
  - b. ANY — This broadens the results. Applicants can meet any of the criteria in that group.
5. Click the Add New Criteria button.

6. Select a Category, Field, Condition, and a Value for each criterion.
7. To create a filter that prompts for a value when it is run, mark the Ask User for value at filter run time check box.
8. A prompt filter must be saved before it can be run.
  - a. Click the Save Criteria button
  - b. Click the Add New Criteria button to add more criteria to the same group.
  - c. In this example, the filter searches for applicants who are U.S. medical school graduates AND have a USMLE Step 2 Score between 190 and 210.
9. When finished specifying criteria, click the Save Criteria button.
10. If desired, click the Add Group button before applying or saving the criteria to add another group of criteria.
  - a. Select the AND or OR radio button to indicate the relationship between the criteria in Group 1 and the criteria in Group 2.
  - b. Click the Add New Criteria button in Group 2.
  - c. Construct the criteria for Group 2.
  - d. By adding Group 2, this example searches for:
    - i. Applicants who are U.S. medical school graduates and have a USMLE Step 2 Score between 190 and 210, OR
    - ii. Applicants who are U.S. medical school graduates and have a hotel in the holiday inn (a user-defined or custom created attribute).
  - e. Below is a completely different example showing the use of multiple groups. This example searches for:
    - i. Applicants who have complete applications, AND
    - ii. Applicants who attended a medical school in the District of Columbia, or Hawaii.

### Step 3: Save the Filter

After creating a new filter, use the Save option and provide a filter name and description. Only the Program Super User, Alternate Program Super User, and Program Coordinator 1 can create and save new filters.

1. In the Filter Criteria panel, click Save Filter button.
  - a. The Apply Filter button is used to run the current filter.
2. Enter a Name and Description.
  - a. The name must be unique and between 1 and 100 characters.
  - b. The description must be between 1 and 500 characters.
  - c. The default sort order for the Filter results grid is first by Applicant Name (last name, first name, middle initial). Then by AAMC ID for Allopathic programs.
3. Click the Save button.
  - a. The filter now appears under the Manage Filters tab in the User-Defined panel.
4. Click the filter to apply and display results.

## Modify Filters

After running a system or user-defined filter, use the Modify Filter Criteria panel to adjust the criteria. Use the update feature to save changes to the existing filter or save changes as a new filter.

### *To Modify a Filter:*

1. Navigate to Filters on the Applications tab.
2. Locate the filter to modify.
3. Click the filter to run it.
4. Expand the Filter Criteria panel to view the criteria.
5. Make the necessary changes to the criteria and click the Save button.
6. To save and replace the current filter with the new criteria, modify the description if needed, and click the Save button.
7. To save as a new filter, enter a different filter name, and click the Save As New button.

## Filter Results

The Results panel displays the applicants that meet the selected criteria. Use the scroll bar or the navigation arrows to view the results. Click the column headings to sort the results in ascending or descending order. Click the applicant's name to view the selected applicant's record. Possible actions include:

- Navigating through the list.
- Sorting the list of applicants.
- Viewing the applications.
- Completing a Bulk Action.
- Refining results.
- SOAP- participating programs will see a SOAP indicator next to applicants who applied to their program during SOAP.

Filter Results are not automatically updated when the page is refreshed. Re-run the filter to view any changes to the filtered results.

## Bulk Actions

Bulk Actions can be performed after applying a filter and selecting one or more applicants. The following choices are available in the Bulk Actions drop-down list at the bottom of the Results panel (by Program Super User, Alternative Program Super User, and Program Coordinator 1):

Reviewers\_Interviewers also have access to bulk actions:

- Reviewers\_Interviewers can View/Print Application.
- Only Reviewers\_Interviewers and Reviewers\_Interviewers Limited Access can perform Update Status, Update Attributes, and Update Notes.
- Only Reviewers\_Interviewers and Reviewers\_Interviewers Read-Only can perform View/Print Reports.

Note: At least one applicant must be selected to view the Bulk Actions drop-down list.

|                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Update Status</b>      | Updates the Application, Interview, Ranking, and/or Custom status of the selected applicant(s).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Update Attributes</b>  | Updates a specific attribute for the selected applicant(s) to a specific value.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Update Notes</b>       | Adds a note for the selected applicant(s).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Bulk Messages</b>      | Sends a message to the selected applicant(s).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>View/Print Reports</b> | Views/prints one of the following reports for the selected applicant(s): <ul style="list-style-type: none"> <li>• Applicant Roster - Displays the applicants and their most recent application status.</li> <li>• Applicants applying as a Couple - Displays applicants who have indicated they want to match as a couple and to which specialties the partner is applying.</li> <li>• Missing Documents - Displays applicants who are missing at least one standard ERAS document.</li> <li>• Withdrawn Applicants - Displays applicants who have been withdrawn from the program or withdrawn by applicant.</li> </ul> Applicants Selected to Honor Societies - Displays all applicants and indicates who was selected to an honor society. |

#### To Navigate Through the List:

- Click the scroll bars and/or the navigation buttons.

#### To Search the List of Applicants by Last Name:

- Type the applicants last name in the search bar located under Current Results.

#### To View the Applications:

- Click the Applicant name; the application is displayed under the View Applications under the

Applications tab.

#### Update Status:

1. Select the applicant(s).
2. Select Update Status from the Actions drop-down list.
3. Select one of the following status options: Application, Interview, Ranking, or Custom.
4. Make the appropriate changes for the desired statuses.
  - a. The Assign option will check the box for the desired status.
  - b. The Unassign option will uncheck the box for the desired status.
5. Click the Save button.

#### Update Attributes:

1. Select the applicant(s).
2. Select Update Attributes from the drop-down list.
3. Choose the appropriate type of attribute (Checkbox, Textbox, Date, or Drop-down) and make the appropriate changes.
  - a. The Assign option will check the box for the desired status.
  - b. The Unassign option will uncheck the box for the desired status.

4. Click the Save button.
5. Click the Close button to close the Update Attributes light box.

#### *Add Notes:*

1. Select the applicant(s).
2. Select Add Note from the drop-down list.
3. Type the note.
4. Click the Add button.

#### *Send Bulk Messages:*

1. Select the applicant(s).
2. Select Bulk Messages from the drop-down list.
3. Compose the message and Click the Send button.
  - a. The Compose message window appears. All applicants are blind carbon copied (bcc'ed).

#### *View/Print Reports:*

1. Select the applicant(s).
  - a. It may make sense to select all filtered applicants when generating the Applicants Applying as a Couple, Missing Documents, Withdrawn Applicants, or Applicants Selected to Honor Societies reports. Use the select all option to Select All applicants on the filtered list.
2. Select View/Print Reports from the drop-down list.
3. Select a report.
  - a. A PDF of the report appears in Adobe Reader. The Adobe Reader toolbar offers buttons for saving, printing, navigating, and zooming the PDF report. Visit [this resource](#) for help on how to use Adobe Reader.

#### *View/Print Application:*

1. Select the applicant(s).
2. Select View/Print Application from the drop-down list.
3. Choose the information to view or print; at least one document type must be selected.
  - a. Choose any other additional information to view or print.
  - b. Select whether to print each application to its own separate PDF or print each application to one cumulative PDF.
  - c. Note: If you have selected more than 100 applicants, you will have to print all applications to one PDF.
4. Enter a Print Job name. This name helps identify the print job under Bulk Print Requests.
5. Click the Request Print button.
  - a. The print request is sent and may be retrieved by clicking the Bulk Print Requests link in the header area.
6. Click the Bulk Print Requests link in the header area.
7. The Print Requests light box lists print jobs requested and scheduled exports. If the status is complete, the resulting file can be opened or saved to a local or network drive.
8. Click the report name link under the Files column to open or save the report.
9. If the Print each application to a separate PDF box was checked, a .zip folder displays with each PDF report listed separately.

- a. A PDF of the report appears in Adobe Reader. The Adobe Reader toolbar offers buttons for saving, printing, navigating, and zooming the PDF report.
- b. Visit [this resource](#) for help on how to use Adobe Reader.

#### *Run an Export Report:*

1. Select the applicant(s).
2. Select CSV Export from the menu.
3. Select a CSV template to run.
4. Click the Run Export button.
5. Click the OK button.
6. Close the CSV Templates box to return to the applicant list.
  - a. The CSV export is scheduled and is viewable from the Exports tab in the CSV Exports panel or from the Bulk Print Requests link in the header area.

#### *Modify an Export Report Template:*

1. Under the Exports tab, select a CSV template to modify.
2. Edit the fields to export by clicking the field name(s) in the Available Fields box and using the drag and drop to move and rearrange the desired field(s) in the Fields to Export box.
3. When finished, choose Save & Run to save the template for repeated use and run the export immediately; or, choose Run to run the export without saving the template.
  - a. If the template is a Custom Template, the Save & Run option will be available to save the existing template.
4. In the Bulk Print Requests, click the Download status link on the line next to the requested time.
5. When prompted, download the CSV file.

## Export Data

ERAS data is categorized by information type and can be exported either by type or all together. This includes over 200 data items relating to the data the applicant sent (such as name, contact information, gender), the data the examining boards sent (such as COMLEX-USA and USMLE scores), and the data recorded about the applicant (such as interview date, status, scores).

Information from other fields may be exported, such as:

- Education Information.
- Geographic Preference Information
- Interview Information.
- License Information.
- Medical Education Information.
- Publication Information.
- Research Information.
- Qualifying Residency/Fellowship Information.
- Ranking/Track Information.
- Professional Experience Information.
- Program Signal Information

- Race/Ethnicity Information.
- Residency/Fellowship Information.
- Interview Schedule Information.
- SOAP Applicant Information (Allopathic Residency Programs only).

To export data, a template must be created. This involves selecting the fields to include in the export and providing a name for the template. Once the template is saved, it can be used repeatedly to export the same set of data or modified when the need arises. When exporting data, a copy of the data is exported. The original data is not affected.

Note: The ERAS system cannot support software outside of the PDWS. Refer to the documentation for that software to successfully transfer information or utilize exported data.

To Create a New Export Template:

1. On the Exports tab, click the Add Export Template link.
2. Type a name for the template in the CSV Export Name box.
3. Select the Type of Data to Export drop-down.
  - a. The type of data selected controls the fields listed in the Available Fields box.
4. Select the fields to export by clicking the field name(s) in the Available Fields box and using the arrow buttons to move and rearrange the desired field(s) in the Fields to Export box.
5. When finished, choose Save & Run to save the template for repeated use and run the export immediately. Choose Run to run the export without saving the template.
6. Click the OK button.
  - a. The export is scheduled, and the status appears in the Bulk Print Requests in the upper-left area of the screen.
7. Click on Complete next to the CSV export name to open or save the export.
  - a. CSV exports are also viewable from the Exports tab or from the Bulk Print Requests link in the header area.

## Applicant History Log

The History link tracks the following:

- Changes to statuses and scores, including interview scores.
- Changes to the list of attributes.
- List of documents added or deleted.
- Tracks added by program.
- Reviewer assignments added by program.

Note: The log is only accessible to users who have permissions to perform these tasks.

## Rankings

The Rankings tab of PDWS is used to review, compare, and rank applicants. The Rankings tab displays a list of applicants selected for ranking with rank value as N/A and ranked applicants with

rank value. The ranked applicants can only be accessed by the Program Super User, Alternate Program Super User, or Program Coordinator 1 roles. After the list has been finalized in the PDWS, a Rank Order List (ROL) file can be generated and can be uploaded into matching agencies (NRMP and NMS).

Residency programs participating in SOAP will see a SOAP indicator next to applicants who applied to the program during SOAP.

An applicant's ranking status can be changed to Selected for Ranking by going to:

- The Status tab under the Applications tab (for a single applicant).
- The Update Status bulk action located from View Current Results (for multiple applicants).
- The Applicants section under the Scheduler tab.

Different rankings of selected applicants can be seen by selecting the appropriate Track to Rank (e.g., Categorical or Preliminary or Fellowship).

Depending on your role, some or all of the following bulk actions are available in the Rank tab:

1. Compare.
  - a. Used to compare applicants and view the applicant comparison items side-by-side. The Comparison list is defined in the Setup tab and can include up to seven items.
2. Clear Rank Numbers.
  - a. Used to clear the rank numbers for all the selected ranked applicants.
3. Print Applicant Summary.
  - a. Used to view/print the Applicant Summary of all selected applicants in the Rank tab.
4. Send Message.
  - a. Used to send a message to selected applicants.

Note: To review an individual applicant, click the Applicant name to open the applicant's application in another window.

## Sort Applicants

By default, the list of applicants selected for ranking is sorted by Rank (descending order), Composite Score (descending order), then by Applicant Name (ascending order), and then by AAMC ID (ascending order for allopathic programs). These sorting options can be modified but the Withdrawn by Applicant and Withdrawn by Program applicants will always be sorted last.

To Sort Applicants by Composite Score Ascending or Composite Score Descending, click the Auto Rank By drop-down and select the desired option.

## Enter Comments

Comments entered in the rankings tab can only be viewed in the rankings tab. This gives users the opportunity to add comments to individual applicants without leaving the rankings tab.

To enter Comments:

1. Click on the notepad icon under the Actions column.
2. Type the comment.
3. Click the outside of the textbox to save the comment.

- a. Note the comment icon has changed. Click the comment icon to expand the comment box for easier reading.
- b. Comments entered by users cannot be seen by applicants.

## Compare Applicants

The Compare Applicants feature allows users to compare the photograph, applicant name, rank, and other items determined in the Comparison Tool subtab under the Setup tab.

Please note screened data will not appear in the Compare Applicants view.

To Compare Applicants:

1. Select two or three applicants from the Rank tab.
2. Select Compare from the Bulk Action drop-down list.
3. The window will allow users to compare the applicants.
4. Click the Close button to close the window.

Note: The fields on which each applicant are compared were selected in the Comparison Tool Setup.

Only two or three applicants may be compared at a time.

## Rank Applicants

To Rank Applicants:

1. Select the applicant(s).
2. Use one of the following options to rank the applicant(s):
  - a. Drag and drop the applicant's photo icon or the applicant's hyperlinked name to a new position in the list.
  - b. Enter a rank number in the rank box and click outside the box to save the entry.
3. Click the Auto Rank By drop-down and select Composite Score Descending/Ascending button(s) at the bottom to automatically rank applicants by composite score and override any existing ranks. Both buttons provide options to rank only the ranked applicants or all active applicants by their composite Score.

Users can clear an applicant's rank number individually or in bulk using bulk actions.

To Clear Rank Numbers:

1. Select the applicant(s).
2. Select Clear Rank Numbers from the Actions drop-down list.
3. Click the Continue button.

Users can clear an individual applicant's rank number by clicking into the textbox located next to the applicant's name and deleting the content in the textbox.

The applicant(s) rank value is updated with N/A, and the record moves along with the unranked applicants in the grid.

## Print Applicant Summary Reports

The applicant Summary provides programs with an overview of the following applicant data:

- Personal Information.
- Most Recent Medical School.
- Most Recent Residency.
- Program Signal.
- Geographic Preferences.
- Qualifying Experiences.
- Tracks.
- Statuses.
- Scores.
- Attributes.

To view/print the Applicant Summary Report for applicants:

1. Select the applicant(s).
2. Select Print Applicant Summary from the Actions drop-down.
3. Enter a Print Job Name.
4. Select whether to print each application to a separate PDF or print all applications to one PDF.
5. Click the Continue button; a message confirming your request will appear.
6. Click the Bulk Print Request link in the header area to access the print job.
7. In the Print Requests box, click download in the Status column. The report will download to your local device and can be opened from there.
  - a. The Adobe Reader toolbar offers buttons for saving, printing, navigating, and zooming in the PDF report.
  - b. Visit [this resource](#) for help on how to use Adobe Reader.

## Create Rank Order List (ROL)

Rank Order Lists allow programs to view/print or export system generated lists using the applicants from the Rankings tab. Users can choose from the followings options:

1. [Ranked Applicants by Applicant](#) - Displays all ranked applicants by applicant. Not limited to the applicants selected in the tab.
2. [Ranked Applicants Applying as a Couple](#) - Displays all ranked applicants applying as a couple by track. Not limited to the applicants selected in the tab.
3. [Ranked Applicants by Track](#) - Displays all ranked applicants by track. Not limited to the applicants selected in the tab.
4. [Rank Oder List \(ROL\): Rank, AAMC ID, NRMP ID, USMLE ID, Name](#) - Displays all ranked applicants for the track selected, if the program has multiple tracks. When there are no tracks available, the report generated is for the program.
5. [NRMP Rank Order List \(ROL\): Rank, AAMC ID. Use this format for upload to the NRMP](#) - Displays all NRMP ranked applicants for the track selected, if the program has multiple tracks. When there are no tracks available, the report generated is for the program.

The following steps will show users how to create a rank order list, view/print ranking reports, and send messages from the Rankings tab.

#### *Create a Rank Order List (ROL) Report:*

1. Click Export Rank Order List.
  - a. If this is an Osteopathic program, the Rank Order List (ROL) will contain Rank, AOA Match Code, Last Name, First Name, Middle Name, AOA ID, AAMC ID.
2. Select Rank Order List (ROL): Rank, AAMC ID, NRMP ID, USMLE ID, Name or NRMP Rank Order List (ROL): Rank, AAMC ID. Use this format for upload to the NRMP.
3. Select whether the ROL File Format will be CSV or TXT.
4. Click the OK button.
5. The report is downloaded to your device. Choose whether to Open the file immediately or Save it to a specific location.
  - a. The Rank Order List file is automatically named with the Program Name, Specialty, and Track.

#### *View/Print Ranking Reports:*

1. Click Export Rank Order List.
2. Select the desired report to view or print.
  - a. The Adobe Reader toolbar offers buttons for saving, printing, navigating, and zooming in the PDF report.
  - b. Visit [this resource](#) for help on how to use Adobe Reader.

#### *Send Messages:*

1. Select the applicant(s).
2. Select Send Message from the Actions drop-down list.
3. Enter a Subject.
4. If desired, use the Apply a Message Template option to select a pre-defined template message.
5. If desired, use the Attach a File link to include a document with the message.
6. Enter a message in the body.
7. Click the Send button.
8. Click the Save As Draft button to save a draft and come back and send the message later.
9. Click the Save As Template button to save the message as a template for future use.
10. Click the Discard button to exit the light box without sending the message.

Please note: When sending a bulk message to multiple applicants, applicants are blind carbon copied (bcc'd) and therefore will not see other applicant's names included in the message.

## Program Message Center

Each program has a message center that is set up in PDWS. Messages can be managed, including composed and replied to, by Program Super Users and Program Coordinators. A Program

Coordinator Read-Only can view sent and received messages but is not able to send messages. Tasks that can be performed by Super Users and Program Users include:

- Composing a message.
- Saving a message as draft or template.
- Modifying a message.
- Viewing a message.
- Printing a message.
- Replying to a message.
- Moving a message to trash.
- Deleting a message.

PDWS tracks messages sent to the applicant on the Communication tab within the Evaluate Application section of the application.

If the applicant responds to the message via the MyERAS system, the system also tracks the response in the Communication tab.

## Accessing the Program Message Center

The Program Message Center is accessible from the following areas of PDWS:

| Tab                         | Directions                                                                                                                                                                                         |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Program Messages tab</b> | Users can go directly to the Program Message Center by selecting the <b>Program Messages</b> tab.                                                                                                  |
| <b>Applications tab</b>     | When the applicant email address (located in the header of the application) is clicked, the Compose light box opens with the “To” address field pre-populated.                                     |
| <b>Filter results</b>       | When a filter is applied and results are obtained, a bulk action of Send Messages can be used. The Compose light box opens with the “To” address field pre-populated with all selected applicants. |
| <b>Rankings tab</b>         | Messages are sent to ranked applicants and applicants selected for ranking using the bulk action of Bulk Messages.                                                                                 |

## Program Messages Folders

| Folder           | Description                                                                                                                                                  |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Compose</b>   | Starts a new message to an applicant. Type the Applicant Name (the field uses predictive text based on letters being typed) or the AAMC ID.                  |
| <b>Inbox</b>     | Displays messages from applicants. The three subfolders can be renamed for a program's organizational purposes.                                              |
| <b>Sent</b>      | Contains messages sent to applicants and interviewers.                                                                                                       |
| <b>Drafts</b>    | Contains messages started and saved as drafts.                                                                                                               |
| <b>Templates</b> | Contains message templates for frequently sent messages. Programs can create up to 250 message templates.                                                    |
| <b>Trash</b>     | Messages can be moved back into other folders, such as the Inbox, which restores the message. Messages deleted from the Trash folder are permanently erased. |

## Composing and Sending Messages

To Compose and Send a Message:

- Click Compose from within the Program Messages tab or access the Compose light box from another area of the PDWS (see Accessing the Program Message Center on page 135).
  - If the Compose light box was accessed from another area of the PDWS, the To field is automatically populated with the applicant(s) or interviewer(s) address(es). If Compose is selected from the Program Messages tab, recipients are manually entered (the To box uses predictive text based on letters being typed).
  - Additional recipients can be entered manually. Applicants and interviewers are all blind carbon copied or bcc'ed, so they cannot view the other message recipients.
  - The From field is automatically populated with the Program Name.
- Enter a Subject and Message; both text boxes must be entered to send a message.
  - Special formatting (bold, underline, italics) as well as spell check with a medical dictionary is available.
  - The Wildcard option allows users to personalize messages by creating a merge field for first, last, or full names in bulk messages.
  - Use the Apply a Message Template option to select a pre-defined template message.
  - Use the Attach Files link to include one or more documents with the message. The attached file must be in PDF format, and the combined file size cannot exceed 5MB.
- Click the Send button to send the message to recipients.
  - Use the Save As Draft button to save the message to the draft folder and send later.

- b. Use the Save As Template button to save the message as a template for future use. Enter a template name; otherwise, the Subject line will be used as the template name.
- c. Use the Discard button to exit without saving or sending the message.

## Inbox

The Inbox displays the following columns: From, Subject, Read by, and Date. A message displayed in bold denotes an unread message.

Directly from the Inbox, users can:

- Reply to a message.
- Print a message.
- Move a message to the trash or any user-defined folder.
- Navigate to the next or previous message.
- Search for Messages.
  - To find messages using the search bar, type in a keyword or phrase related to the email you are looking for.

## Applicant Messages in the MyERAS® System

Applicants receive an email message from the PDWS program message center at the email address they provided on their MyERAS application. The email will contain the content of the MyERAS message, but applicants will need to log into the MyERAS system to access attachments and reply to the message. Please note, applicants cannot initiate messages to a program from the MyERAS system.

## Setup

The Setup tab provides a central location for those with the appropriate permissions to set up program defaults and manage users. Institutions define settings for RMS Selection, data filter settings, and manage users. Programs define settings for program data filters, applications, and ranking based on their selection policy and requirements. Programs also define user roles, which determine what program staff can do in the PDWS.

The major tasks performed in Setup include:

- Determining which items are screened during the application evaluation process.
- Adding statuses and scores to display when evaluating applicants.
- Creating searchable data fields specific to your program, known as attributes.
- Managing users.
- Setting up the ranking comparison tool.

## General Data

### Screen Data

This option allows the Institution Super User, Alternate Institution Super User, Program Super User, or Alternate Program Super User to determine which sensitive data items are viewable during the application evaluation process. Program super users have the option to update 6 screened data fields, and institution super users can update all 13 screened data fields.

By default, all data listed in the Screened box are not shown on applications, reports, and filters. Items can be moved to the Viewable list to make them visible on applications, reports, and filters.

### Reports

Use this option to determine which reports to display on the Dashboard.

The following reports are available to display on the Dashboard:

- Applicant Roster.
- Applicants Applying as a Couple.
- Applicants Selected to Honor Societies.
- Missing Documents.
- Withdrawn Applicants.

### RMS Selection

This option allows the Institution Super User (ISU) and Alternate Institution Super User (AISU) to allow programs to allow match applicant data to be made available to a residency management system(s) such as MedHub, Medtrics, MyEvaluations.com, or New Innovations. ISUs and AISUs must toggle to the Institutional level in order to access the RMS Selection options. Institutions that opt to authorize applicant data availability can select one RMS vendor for all programs or indicate a vendor(s) for specific program(s).

Select Apply to save changes.

Note: For the RMS vendor to have access to ERAS data, programs will need to mark the status of all incoming applicants as Will Start. Programs then need to request the data from the RMS vendor portal.

### Comparison Tool

The Rankings Comparison Tool allows Program Super Users, Alternate Program Super Users, and Program Coordinator 1s to select criteria to use when comparing and ranking applicants. The Comparison Tool, by default, displays Applicant Name, Photograph, Rank, Ranking Comments, and Composite Score. Users may remove and add criteria items, up to seven items total. Applicant Name, Photograph, and Rank always display and cannot be removed, and do not count towards the seven-item limit.

The Ranking Comparison Tool will allow you to select criteria you wish to consider when comparing applicants during the ranking process. Select up to 10 items, which can include both system-defined

and custom scores, to display in the Comparison Tool. Drag and drop items from Available Fields to the Fields to be Displayed.

To Set Up Ranking Items to Display:

1. Select Comparison Tool from the General setup submenu.
2. Select up to 10 items from the Available column that you want to be included in the Rankings Comparison Tool.
3. Use the drag and drop feature to move the item to the Fields to be Displayed column.
  - a. Use the drag and drop feature to change the order in which the criteria will display when comparing applicants for ranking.

## Manage Users

Users with a Coordinator or Super User role can invite new users (for equal access or lower) to access the PDWS using the User Management Tool (UMT) in the Setup tab.

*To invite a new user:*

1. Click the Invite User button under the Invitations tab.
2. Enter the following criteria: First Name, Last Name, and E-mail.
3. Select a Role from the list of System-Defined roles to assign.
4. Click the Invite User button.
  - a. The system sends an email to the new user and changes the user's status to Invited.
  - b. The invited user receives an email invitation with a link to the PDWS and instructions to:
    - i. Register for an AAMC account or log in with an existing AAMC account.
    - ii. Verify their email account (only if a new AAMC account was created).
  - c. After the user logs into PDWS and accepts the Terms and Conditions, the user will be able to access the system, and they will become Active users.

*Instructions for the Invitee:*

1. Open the email with the subject "You have been invited to create an account with the AAMC" and click the link in the body of the message.
2. The AAMC Sign In screen will appear.
3. If you already have an AAMC Account, log in. If an access code email appears, put in the invitee's email. Otherwise, click the Create AAMC Account link.
4. Fill in the required fields under Personal Information, Initial Questions, and Account Information
5. Click the check box to accept the Privacy Statement and the AAMC Web site Terms and Conditions.
6. Click Submit.
  - a. A message appears indicating that a message was sent to confirm the email address.
7. If a new account user, open the email with the subject "Complete Your AAMC Account Registration" and click the link to complete registration.

8. The Account Verified screen appears with a link to Sign In.
9. Click the Sign In link.
10. Log in and accept the terms to use the PDWS.
  - a. The previous registration links that were contained in the email invitation have become deactivated, so bookmark the ERAS PDWS link for future access.

*To Search for a User by Name, Email, or Role:*

1. Click in the Search box.
2. Type the part of user's first name, last name, email, or role.
3. Click the Search button.

*To Assign or Revoke a Role for an existing user:*

1. Select an existing user from the Users tab.
2. Click on the three dots under the Actions column.
3. To assign a new role, click Grant Roles.
  - a. Note: The roles of a user may be swapped, but users should not be assigned more than one role. Select a Predefined role and click Grant Roles to assign an additional role to the user.
4. To revoke an existing role, click the Revoke Roles under the Actions column.
5. To Assign and Revoke roles in bulk:
  - a. Select multiple users.
  - b. Under Bulk Actions, select Extend Roles or Revoke roles.
    - i. Note: Selecting Extend Roles will extend the expiration date for the selected user(s).

*To Filter and Reorder the List of Users by Status:*

- The Column Filter allows users to filter and search for items within a specific column:
  - Last Name
  - First Name
  - Email Address
  - Expiration Date
  - Roles
- Reorder allows users to reorder columns using the left and right arrows.
- Show/Hide allows users to select the following columns to hide or make visible:
  - Email
  - Expiration Date
  - First Name
  - Last Name
  - Roles

## Program Information

The links available under the Program Information header are available to customize specific program information. Only users with Program Management, ISU, AISU, PSU, and APSU roles in PDWS have access to view the Program Management tab.

### ERAS Institutional Contact Information

Updating the Institutional Contact Information allows programs to have the correct contact information for your institution. This information is stored privately for access by ERAS staff only. Your data will not be shared with applicants. Primary and Secondary contacts are individual(s) designated by the DIO to fulfill ERAS responsibilities on the DIO's behalf.

#### *To Update the ERAS Institutional Contact:*

1. Navigate to the Setup tab.
2. Select ERAS Institutional Contact Information to update institutional contact information.
3. Click Edit.
4. Enter the appropriate information for your program's Primary and Secondary institutional contact.
  - a. Primary Contact Fields: Prefix (Optional), First Name, Middle Name (Optional), Last Name, Suffix (Optional), E-mail, Phone, Extension (Optional), Fax (Optional), Address 1, Address 2 (Optional), City, State, Zip.
  - b. Secondary Contact (optional) Fields: Prefix, First Name, Middle Name (Optional), Last Name, Suffix (Optional), E-mail, Phone.
5. Click Save.

### Program Listing

The program listing tab displays the program listing information and allows users to edit program director and program information that will be displayed to applicants while viewing your programs information in the MyERAS system.

#### *To Update Program Director Information:*

1. Navigate to the Setup tab.
2. Select Program Listing to update your program's information in the MyERAS system.
3. Click Edit.
  - a. Note: This information will be displayed to applicants viewing your program's information in the MyERAS system.
4. Enter Program Director Information:
  - a. First Name, Middle Name (Optional), Last Name, Suffix (Optional), Designation (Optional), E-mail.
5. Enter Program Information:
  - a. Address 1, Address 2 (Optional), Address 3 (Optional), City, State, Zip, Phone, Extension (Optional), Fax (Optional), E-mail, Website (Optional).
6. Add Social Media. Please note that the maximum number of social media accounts allowed is three.
7. Select an answer for Are you an Osteopathic Recognized Program?

8. Click Save.

## ERAS Program Contact Information

Updating the ERAS program contact information allows programs to have the correct contact information in ERAS. **The information entered in this section is stored privately for access by ERAS staff only. Your data will not be shared with applicants.**

To Update ERAS Program Contact Information:

1. Navigate to the Setup tab.
2. Click ERAS Program Contact Information.
3. Click edit.
4. Enter the appropriate information for your program's Primary and Secondary program contact. The Secondary contact is optional.
  - a. Primary Contact Fields: Prefix (Optional), First Name, Middle Name (Optional), Last Name, Suffix (Optional), E-mail, Phone, Extension (Optional), Fax (Optional), Address 1, Address 2 (Optional), City, State, Zip.
  - b. Secondary Contact Fields: Prefix, First Name, Middle Name (Optional), Last Name, Suffix (Optional), E-mail, Phone.
5. Click Save.

## Applications

This section allows program users to review and update system defined/custom statuses, scores, and attributes.

### Statuses

An application's status specifies where an application is in the application review and ranking process. The statuses display in the At-a-Glance Panel for each application.

Two status types contain pre-defined statuses:

- Application
- Ranking

A new status may be added to the Custom status type. Program Super Users, Alternate Program Super Users, and Program Coordinator 1s can add user-defined statuses to the Application and Ranking status types or create a status under the Custom type. Once added, the statuses appear in the Application's header information and become filterable fields.

### Manage Statuses

- Status names have a maximum of 25 characters.
- Up to 10 user-defined statuses can be added total, among all types of statuses.
- User-defined statuses can be:
  - Added to existing types (Application and Ranking) or created under Custom status.
  - Edited within the group.

- Reordered
- Renamed.
- Deleted.
- Statuses cannot be deleted if:
  - The field has been given a value for at least one application.
  - The field has been saved in a filter.
  - The status is system-defined.

#### *To Add a Status:*

1. Click the Add Status button for the appropriate status type (Application, Interview, Ranking, Custom).
2. Type the status name.
3. Click Save.

#### *To Edit a Status:*

1. Select the pencil icon.
2. Begin typing to rename the status.
3. Click Save.
  - a. Only user-defined statuses can be edited.
  - b. Statuses cannot share the same name.

#### *To Reorder the Status List:*

1. Select the status to move.
2. Click, Drag, and Drop the status up or down within the list.
3. Both system and user-defined statuses may be reordered.
  - a. Reordering also appears in the Status tab of the Evaluate Application panel on the Applications tab.

#### *To Delete a Status:*

1. Select the trash icon.
2. Click Delete to confirm deletion.
3. Statuses cannot be deleted if:
  - a. The field has been given a value for at least one application.
  - b. The field has been saved in a filter.
  - c. The status is system-defined.

## Scores

During setup, which usually occurs at the beginning of the season, Program Super Users and Program Coordinator 1s define and adjust scores and weights to reflect a program's selection requirements and criteria. The PDWS automatically calculates the weighted score for each score entered on the Applications tab. At any time, scores and associated weights can be edited or added. Programs can choose which scores are included in the composite score from this location. Once added, the custom scores appear in the Scores tab of the Evaluate Application panel on the Applications tab.

**Notes:**

- Score names have a maximum of 25 characters.
- Up to 25 user-defined scores can be added.
- Weight and score ranges must be between 0.01 and 999.99.
- Scores can be:
  - Added/Created.
  - Edited.
  - Renamed.
  - Deleted.
- Scores cannot be deleted if:
  - The score has been given a value for at least one application.
  - The score has been used as part of a filter.
  - The score is system-defined.

*To Add a Score:*

1. In the appropriate score group (Board, Documents, Reviewer or Custom), click the Add Score button.
2. Enter the score name, and then click anywhere else on the page, or press the Enter key.
3. Enter the score weight.
4. By default, the score weight is 1.00, and can be changed as needed.
  - a. Score weight must be in the range of 0.01 – 999.99.
5. Mark whether the score will be included in the composite score when comparing applicants for ranking.
6. Custom scores under Reviewer can be included in the total and average scores that appear under the Scores tab.

*To Edit a Score or Change the Weight of a Score:*

1. Select the appropriate score.
2. Click the default 1.00 weight.
3. Change the weight or inclusion of the status in the composite score. Weight can range from 0.99 to 999.99. Users can manually enter a score or use the up and down arrows.
4. Click outside of the box.
5. Click the Save button.
  - a. System-defined score names cannot be edited.

*To Delete a Score:*

1. Select the trash icon under the Actions column.
2. Click the Delete button to confirm deletion.
3. Scores cannot be deleted if:
  - a. The score has been given a value for at least one application.
  - b. The score has been used as part of a filter.
  - c. The score is system-defined.

## Attributes

An attribute is a user-defined data field used by a program to track additional information on applicants. Program Super Users, Alternate Program Super Users, and Program Coordinator 1s can create Checkbox, Textbox, Date, or Drop-down attributes at any time throughout the season.

Below are examples of attributes:

- Research Experience - A text field that tracks an applicant's research specialty interest (e.g., Cardiology, Infectious Diseases, etc.).
- Resident Shadowing date - A calendar date that tracks when an applicant will shadow a current resident.
- Hotel List for interviewees - A drop-down list that tracks which hotel each applicant will be staying in.
- Urban Experience - A checkbox that tracks whether an applicant has experience in an urban setting.
- Once a new attribute is defined, it is viewable from the Attributes tab in the Evaluate Application panel.

### Manage Attributes

The Program Super Users, Alternate Program Super Users, and Program Coordinator 1s can create attributes with the following display types:

- Checkbox (Checked or Unchecked).
- Textbox (Free alphanumeric text).
- Date (Entered via pop-up calendar).
- Drop-down list (Can include up to 10 values).
- Attributes can be:
  - Added.
  - Edited.
  - Deleted.
- Attribute names have a maximum of 35 characters.
- Up to 100 attributes can be added in the PDWS.
- Once added, Attributes are available for filtering.
- Attributes cannot be deleted once they have been given a value for at least one application or if they have been used as part of a filter.

### To Add a Checkbox, Textbox, or Date Attribute:

Click the Add Attribute button for the appropriate attribute type.

1. Enter the attribute name.
2. Click the Save button.

### To Add a Drop-down Attribute:

1. In the Drop-down panel, click the Add Attribute button.
2. Enter the Attribute Name.
3. Enter each value that should appear in this drop-down.

4. Click the Edit icon and enter the text you want to display in the drop-down list.
5. Use the drag and drop feature to change the order in which the drop-down values display in the list.
6. Use the Trash icon to delete a value.
7. Click the Save button when finished.
8. All attributes are active by default.

#### *To Modify an Attribute:*

1. Select the Pencil icon.
2. Make the desired changes.
3. Click the Save button.

#### *To Delete an Attribute:*

1. Click the Trash icon next to the relevant attribute.
2. Click the Delete button to confirm deletion.

Attributes cannot be deleted if it is selected for at least one application or is referenced in at least one saved filter.

## Additional Information

### Setup History

The Setup History light box logs changes that were made to the following setup areas:

- Status
- Scores
- Attributes
- Roles
- Screen Data

The log tracks the name of the user who made the change, what the change was, and when the change occurred.

### Printing

The Bulk Print Requests link is located on each tab next to the search bar. This link opens the Print Requests light box and displays the following information:

- Print Job Name.
- Requested Date.
- Requested Time.
- Status.

If necessary, click the Refresh button to update the list. Documents that have been sent to the printer can be retrieved and printed or saved by clicking on the Status link of the print job. Print requests will be available for 48 hours.

## Print Application(s)

The Print link, located from the Actions tab when viewing an application, opens the Print Application light box. This light box contains criteria that can be selected for printing.

To Print an Application:

1. Click the Print link.
2. Select the Documents and other information that you want to be printed.
  - a. There is an option to print an Applicant Summary, which will print the applicant’s information, scores, and attributes.
  - b. You can re-order the order in which selected documents and other information will be printed by using the drag and drop feature under Your Print Selection.
3. Click the Print button.
4. Print or save the document from the Print Preview window.

## Light Boxes

This section displays a list of what each of the light boxes in the PDWS contain.

### Select Communication Type

Communication records are used to document any contact with the applicant. Select a communication type: Email, Phone, Fax, and Other.

|              |                                 |
|--------------|---------------------------------|
| <b>Email</b> | An electronic message           |
| <b>Phone</b> | Phone conversation              |
| <b>Fax</b>   | Faxed document                  |
| <b>Other</b> | Any other form of communication |

### Add Phone Communication

Enter the appropriate information for phone communication. Click the Add button when finished.

|                |                                                                                                              |
|----------------|--------------------------------------------------------------------------------------------------------------|
| <b>From</b>    | The <b>From</b> field is automatically populated based on the current user’s name.                           |
| <b>To</b>      | The <b>To</b> field may be prepopulated, or names may be entered manually.                                   |
| <b>Subject</b> | The <b>Subject</b> indicates the purpose of the communication.                                               |
| <b>Date</b>    | This is the <b>Date</b> of the phone communication. This date can be typed or selected from the date picker. |

|             |                                                                |
|-------------|----------------------------------------------------------------|
| <b>Body</b> | The conversation details can be a maximum of 8,000 characters. |
|-------------|----------------------------------------------------------------|

### Add Email Communication

Enter the appropriate information for an email communication. Click the Add button when finished.

|                |                                                                                                              |
|----------------|--------------------------------------------------------------------------------------------------------------|
| <b>From</b>    | The <b>From</b> field is automatically populated based on the current user’s name.                           |
| <b>To</b>      | The <b>To</b> field may be prepopulated, or names may be entered manually.                                   |
| <b>Subject</b> | The <b>Subject</b> indicates the purpose of the communication.                                               |
| <b>Date</b>    | This is the <b>Date</b> of the phone communication. This date can be typed or selected from the date picker. |
| <b>Body</b>    | The conversation details can be a maximum of 8,000 characters.                                               |

### Add Fax Communication

Enter the appropriate information for a fax communication. Click the Add button when finished.

|                                                          |                                                                                                                     |
|----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| <b>From</b>                                              | The <b>From</b> field is automatically populated based on the current user’s name.                                  |
| <b>To</b>                                                | The <b>To</b> field may be prepopulated, or names may be entered manually.                                          |
| <b>Subject</b>                                           | The <b>Subject</b> indicates the purpose of the communication.                                                      |
| <b>Date</b>                                              | The <b>Date</b> of the phone communication. This date can be typed or selected from the date picker.                |
| <b>Body</b>                                              | The comments can be a maximum of 8,000 characters.                                                                  |
| <b>Upload File</b>                                       | Only one file can be attached to a communication record and the file type must be .pdf or .jpg of no more than 5MB. |
| <b>Should this attachment appear in Local Documents?</b> | Select whether the attachment should appear in the Local Documents area of the Documents panel.                     |

### Add Other Communication

Enter the appropriate information for the communication. Click the Add button when finished.

|             |                                                                                    |
|-------------|------------------------------------------------------------------------------------|
| <b>From</b> | The <b>From</b> field is automatically populated based on the current user’s name. |
|-------------|------------------------------------------------------------------------------------|

|                                                          |                                                                                                                      |
|----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|
| <b>To</b>                                                | The <b>To</b> field may be prepopulated, or names may be entered manually.                                           |
| <b>Subject</b>                                           | The <b>Subject</b> indicates the purpose of the communication.                                                       |
| <b>Date</b>                                              | This the <b>Date</b> of the communication. It can be typed or selected from the date picker.                         |
| <b>Body</b>                                              | The comments can be a maximum of 8,000 characters.                                                                   |
| <b>Upload</b>                                            | Only one file can be attached to a communication record, and the file type must be .pdf or .jpg of no more than 5MB. |
| <b>Should this attachment appear in Local Documents?</b> | Select whether the attachment should appear in the Local Documents area of the Documents panel.                      |

### Save New Filter

Enter a filter name, select a sort option, and enter a description.

|                                  |                                                           |
|----------------------------------|-----------------------------------------------------------|
| <b>Name of the filter</b>        | The name must be unique and between 1 and 100 characters. |
| <b>Sorted By</b>                 | The default option is by last name.                       |
| <b>Description of the filter</b> | The description must be between 1 and 500 characters.     |

## Reports

| Report Name                            | Displays the Following Information                                                                                                                                                                                                                                                                      | Location in PDWS                                          |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|
| <b>Applicant Roster</b>                | Applicants and their most recent application status. This report will yield results based on applicants in the current filter when run from the Dashboard. This report will yield results based on selected applicants in the Applications tab.                                                         | Dashboard tab - Can be made available in Setup/Dashboard. |
| <b>Applicants Applying as a Couple</b> | Applicants who have indicated they want to match as a couple and to which specialty the partner is applying. This report will yield results based on applicants in the current filter when run from the Dashboard. This report will yield results based on selected applicants in the Applications tab. |                                                           |
| <b>Missing Documents</b>               | Applicants who are missing at least one standard ERAS document. This report will yield results based on applicants in the current filter when run from the Dashboard. This report will yield results based on selected applicants in the Applications tab.                                              |                                                           |

|                                               |                                                                                                                                                                                                                                                                                                                         |                                                            |
|-----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|
| <b>Withdrawn Applicants</b>                   | Applicants who have been withdrawn from the program or by the applicant. This report will yield results based on applicants in the current filter when run from the Dashboard. This report will yield results based on selected applicants in the Applications tab.                                                     |                                                            |
| <b>Applicants Selected to Honor Societies</b> | This report indicates applicants’ membership status for Alpha Omega Alpha, Sigma Sigma Phi, and Gold Humanism Honor Society. This report will yield results based on applicants in the current filter when run from the Dashboard. This report will yield results based on selected applicants in the Applications tab. |                                                            |
| <b>Applicant Summary</b>                      | Summary of the applicant's quantitative and qualitative credentials. This report will yield results based on the selected applicants.                                                                                                                                                                                   | Applications tab - View/Print Applications as Bulk Action  |
| <b>Applicant Summary in Ranking</b>           | Summary of the applicant's quantitative and qualitative attributes.                                                                                                                                                                                                                                                     | Rankings tab - View/Print Applicant Summary as Bulk Action |
| <b>Ranked Applicants by Applicant</b>         | All ranked applicants. The report is not limited to the applicants that were selected in the Ranked tab.                                                                                                                                                                                                                | Rankings tab - Ranked tab - View Reports button            |

## ERAS Program Management (EPM)

The Program Management tab allows program users with Program Management, ISU, AISU, PSU, and APSU roles in PDWS to update the ERAS Participation, Program Characteristics, and Application Requirements.

## ERAS Participation

ERAS registration runs from April through the end of May. To receive applications in the ERAS system, programs must register in ERAS Program Management to indicate that they will have open positions and will use the ERAS program. Use your AAMC username and password to log into PDWS. The program management tab allows users to update their program’s participation status and track information.

### Update Your Program’s Participation Status

1. Navigate to the Program Management tab and select the appropriate.
  - a. Note: Only users with Program Management ISU, AISU, PSU, and APSU roles in PDWS have access to view the Program Management tab in PDWS.
2. Click the program name.
3. Select the drop-down menu to view participation options.
  - a. Programs that have not registered to participate in the current ERAS application season is marked as Unregistered.

4. Select Will have open positions and Will use ERAS to receive applications for the upcoming season.
  - a. Please select the appropriate status if your program WILL NOT use ERAS or accept applications for the upcoming season.
5. After selecting a participation status, click Save. A confirmation message will appear once the status has been saved successfully
  - a. After saving, the program status will change to Participating and additional program information will appear.
6. Select the drop-down to Indicate if your program will opt in to use Thalamus for the upcoming season.
7. Specialties participating in [program signals](#) will automatically have their participation status set to "yes." Programs can opt out by selecting "no." The deadline for opting out is as follows, based on program cycles:
  - a. July Cycle: June 18, 2025, at 5:00 PM EST
  - b. September Cycle: August 20, 2025, at 5:00 PM EST
  - c. December Cycle: October 29, 2025, at 5:00 PM EST
    - i. Please note that participation status cannot be updated after the deadlines listed above for each program cycle.

## Add Tracks Offered

1. Navigate to the Program Management tab and select the appropriate.
  - a. Note: Only users with ISU, AISU, PSU, and APSU roles in PDWS have access to view the Program Management tab in PDWS.
2. Click the program name and scroll down to the Tracks Offered section.
  - a. To add an additional track, click Add Additional Track.
3. Enter the track information:
  - a. Select a Training Type.
  - b. Enter a track name.
    - i. Note: Track Name will be the Track Type by default. You may provide a descriptive name to help applicants distinguish between special types of training. For example, programs may use the Track Name field to label "Rural-based" or "Urban-based" tracks or even "Research" track names as appropriate.
  - c. Enter the NRMP Program Code (Optional).
    - i. Note: If you have already registered your track with the NRMP, you may enter in the 9-11 character NRMP program code. It is not a required field.
  - d. Select Yes to display track information to applicants or select No.
    - i. Choosing not to display a track will not allow applicants to apply to the track, but it will still show up in the Program Director's Workstation (PDWS).
4. Click Save to save to add the track.

## Edit Tracks Offered

1. To edit existing track information:

- a. Click the pencil icon.
2. Edit the track information.
  - a. Click Update to save changes.

## Delete Tracks Offered

To delete an existing track:

1. Click the trash icon
2. Click delete
  - a. Note: You may delete a track ONLY if an applicant has not selected the track. Deleting a track will remove the track from the MyERAS system and the Program Director's Workstation (PDWS). You may edit Track Name, NRMP Program Code, or Display to Applicants at any time.

## Program Characteristics

The following questions are for research purposes only and will not be shared with applicants. All questions are optional. Your responses will help us evaluate the potential value of this information for supporting applicants' exploration of programs in the future.

Questions:

1. Specify the highest level of trauma center:
  - a. At the primary training site (i.e., the site where residents complete the largest amount of clinical experience).
  - b. Across all training sites.
2. Select the settings for the primary training site and secondary training site (i.e., the two sites where residents complete the largest amount of clinical experience)? Select up to two.
  - a. Rural: Large amounts of undeveloped land; low population density; open areas of land with few homes or buildings; no public transportation; private vehicles needed for commuting; main industries likely to be agriculture or natural resource extraction.
  - b. Rural/Suburban.
  - c. Suburban: Smaller urban area around a city; less populated than cities; serves mainly as residential area for cities' workforce; mostly residential with single-family homes, stores, and services; more parks and open spaces than a city; limited public transportation; private vehicles needed for commuting.
  - d. Suburban/Urban.
  - e. Urban: The central part of a city; high population density; high density of structures like houses, buildings, railways; public transportation more readily available for commuting; most jobs are nonagricultural.
3. Select the most common languages spoken among your patient population. Select all that apply.
4. For which patient subgroups do you have specific electives or program offerings (e.g., community free clinic)? Select all that apply.
5. In the last five years, what percentage of alumni (i.e., residents who completed your program) entered the following careers (Enter whole number for percentage.):
  - a. Clinical practice (non-academic).

- b. Academic (teaching focused).
  - c. Research.
  - d. Fellowship.
  - e. Healthcare administration.
  - f. Military.
  - g. Other.
6. In the last five years, what percentage of alumni (i.e., residents who completed your program) obtained (Enter whole number for percentage.):
  - a. A fellowship position at the program institution.
  - b. A position (other than a fellowship) at the program institution.
  - c. A position at another institution in the state.
7. Visa Sponsorship
  - a. Your program's response helps applicants search for programs by visa types in MyERAS.

If the information provided above is incorrect, please contact ERAS Client Technical Support, or log in to GME Track to update it.

## Application Requirements

Questions in this section request your program's requirements for an applicant to be considered for interview. The information you provide will be shared with applicants in the ERAS system during the application process.

Click Edit to update the following information:

1. For the upcoming 2026 residency application cycle, applications must include the following to be considered for interview:
  - a. Total Letters of Recommendation.
  - b. Standardized or Structured Letter of Evaluation.
  - c. Letters of Recommendation From your Specialty.
  - d. Required Away Rotations Within Specialty.
  - e. Supplemental Information.
2. Interview Invitations will be Sent on:
  - a. Universal release date for my specialty.
  - b. Within the following window.

## Contact ERAS Support

The AMC Support Center is available to assist programs with questions about the Program Director's Workstation (PDWS). The AAMC Support Center can be reached by using the following information:

-  [Send us a Message](#)
- Contact Hours: Monday-Friday 8 a.m. - 6 p.m. ET
  -  (202) 828 – 0413
- [ERAS® for Program Staff](#)