

Organization of Neonatal/Perinatal Training Program Directors Meeting October 26, 2007

Using the PDWS to Make Your Job...*Smooth*

Introduction


The PDWS is an incredibly versatile software. We will review some of the more powerful features of the software which can help make your job ... *smooth*.

Local Data Fields

On the Review Sheet under the Status tab there are several pre-defined statuses that may be used to track your application process. However, there may be instances when you need information from your applicants that is not collected by ERAS. Local Data Fields allow you to create user-defined, program-specific data fields that will be displayed on each applicant's Local Data Tab as well as the Status tab.

To create a Local Data Field that highlights incomplete applications:

1. Click on **Tools | Manage Local Data**.
2. Click on **New** to create a new Local Data Field.
3. Type *Incomplete Application* in the field name box.
4. Click the field type of **Status**.
5. Click on **OK**.
6. Under the Status tab on the Review Sheet you now have a new local data field called *Incomplete Application*.

 **Tip:** You may **Filter/Sort** as well as **Export** local data fields.


Filter/Sort

The Filter/Sort function drives the results for the rest of the software functions. For instance, if you apply a Filter/Sort for *Incomplete Application* then go to the **Mail** section, the only e-mail addresses displayed will be for those applicants with an *Incomplete Application* status.

Now that you have created a Local Data Field you may use it to Filter/Sort applicants.

1. Click on **Tools | Filter/Sort**.
2. Click on **All Applicants** to select it.
3. Click **Modify**.
4. Click the drop-down arrow under field and click **Incomplete Application**
 - i) Select the condition 'equals.'
 - ii) Enter the value 'yes.'
5. Click **Add to Criteria**.
6. Modify the field 'Filter/Sort Name' to read *Incomplete Application*.
7. Click **Ok**, and then click **Apply Filter**.


You are now viewing all of the incomplete applications.

 **Tip:** You may now e-mail all of the applicants with incomplete applications.

Now, create a Filter/Sort to display all of the applicants that have publications listed in their ERAS application.

1. Click on **Tools | Filter/Sort**.
2. Click on **All Applicants** to select it.
3. Click **Modify**.
4. Click the drop-down arrow under field and click **Publications**.
 - i) Select the condition 'equals.'
 - ii) Enter the value 'yes.'
5. Click **Add to Criteria**.
6. Modify the field 'Filter/Sort Name' to read 'Published applicants.'
7. Click **Ok** then click **Apply Filter**.

You are now viewing all of the applicants that have publications.


 **Tip:** Use this Filter/Sort to e-mail the applicants, requesting they bring a copy of their publication(s) with them to the interview.

E-mails

When you use the PDWS to send an e-mail to applicants they will get a copy in their MyERAS Message Center. A copy will also be sent to the e-mail address on file for the applicant. This helps to ensure they will receive the e-mail correspondence from you.

To create an e-mail requesting applicants bring a copy of their publication(s):

1. Click on **Mail | Create Email Message**.
2. Click on **To** (*This works like a BCC field. The applicants will only see their e-mail address.*)
3. Click the >> to move all **Available Recipients** to **Selected Recipients**.
4. Click **Ok**.
5. Complete the **From** field with your e-mail address.
6. Complete the **Subject** field.
7. Complete the message body.
8. Click **Send**. A message will be displayed, 'Email message will be dispatched when you next contact the ERAS Post Office.'

 **Tip:** The 'Send' button is not highlighted until all of the required fields have been completed.

You also have the option of exporting the applicant e-mail addresses in order to send them an e-mail from outside the PDWS.

1. Click **Mail | View E-mail Addresses**.
2. Click the >> to move all **Available E-mail** addresses to **Selected E-mail** addresses.
3. Click **Copy**. A message will be displayed that 'You may now paste these e-mail addresses into your own e-mail software.'
4. Click **Close**.
5. Open your own e-mail software.
6. Right click in the BCC field and then left click on **Paste** to insert the e-mail addresses.

Interview Manager

The Interview Manager is a feature that was introduced for ERAS 2007 which allows programs to setup their interview schedule in the PDWS. Interview Manager allows you to enter interview dates and the number of slots available so you can schedule applicants for interview directly from the ERAS software. You must create your interview schedule prior to assigning slots to applicants.

To create an interview schedule:

1. Click **Tools | Interview Manager | New** and the Interview Schedule is displayed.
2. Click the desired date and then click the number of slots that you have available for that day.
3. Click **Apply** to add more dates or click **Ok** when finished.
4. Click **Close**.
5. When you click the **Scheduled for Interview** status on the Review Sheet you may now select dates from the Interview Schedule.



Tip: You may also wait-list applicants if all available slots for an interview date are filled.

Reports

There are several pre-defined reports in the PDWS that you can use to track applicant information and activity:

- Applicant Changes
- Applicant Roster
- Invalid Files
- Scheduled for Interview
- Wait Listed for Interview
- Application Documents Received
- Interview Summary
- Missing Documents
- Withdrawn by Applicant
- Scheduled for Interview and Wait Listed for Interview

You may print these reports to Adobe® PDF by clicking the **Print to PDF** icon on the top right.

To view the Interview Summary Report:

1. Click on **File | Reports | Interview Summary**.

This report displays the following Interview Statuses:

- Selected to Interview
- Wait Listed to Interview
- Interviewed
- Invited to Interview
- Scheduled to Interview

To view the Missing Documents Report:

1. Click on **File | Reports | Missing Documents**.
2. Specify documents to report (if missing).
Example: click **MSPE**.
3. Click **Ok**.

This will display all of the applicants who are missing the MSPE.



Tip: The display of the report will depend on the Filter/Sort that has been applied.

Local Documents

This feature provides you with the ability to attach local documents to a specific applicant. If you have received a physical document, you will have to first scan the document to your computer. If you have received this document as an e-mail attachment then you will be able to browse in the document to the applicant's file.

To use the Local Documents feature to browse in a local document:

1. Click on the **Local Documents** tab.
2. Click the **New** button.
3. Next to **Document** enter a name for the document you're attaching.
Example: Type *Letter of Recommendation*
4. Click the **Browse** button.
5. Locate the saved file and click the **Open** button.
6. The date and time that you browsed in the document is displayed.
7. Click **Ok**.

- **Tip:** You may also enter notes about the document. You may also click the **View** button to verify that the correct document was attached.

Neonatal/Perinatal Medicine Specific Information

- The ONTPD has setup a Web site to assist applicants applying to NPM programs:
<http://www.aap.org/sections/perinatal/ONTPD-Applicants.htm>
- ERAS has posted a link to this information on our participating programs page for the Neonatal/Perinatal Medicine programs listing:
 - Go to www.aamc.org/eras Click "Program Staff" and select "Participating Programs & Specialties" from the navigation menu
- Included on this Web site are
 - NPM Standardized Letter of Recommendation
 - NPM Timeline for application and NRMP Match dates

Contact Us!

The PDWS software was developed with programs in mind. So, when using the software, if you think of any improvements and you'd like to share them with us, please send an e-mail to erasideas@aamc.org.

If you need assistance with using the software:

- Refer to the PDWS manual.
- Send an e-mail to erashelp@aamc.org.
- Call the ERAS HelpDesk at 202-828-0413 Monday – Friday, 8am – 6pm EST.