

# How to Create a CSV Filter in ERAS to Gather Information Needed for New People Import into New Innovations

These simple steps will allow you to create a filter within your exports templates that will allow you to easily export your ERAS Matched applicant's required data needed for you to import your new incoming people into New Innovations.

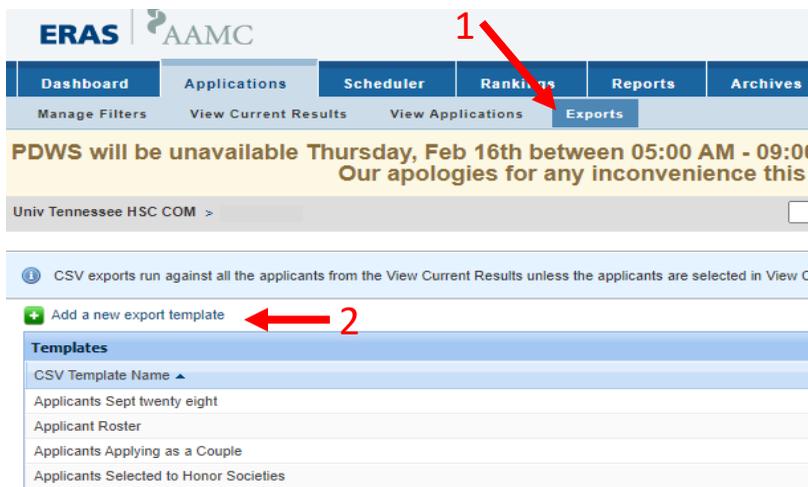
## IMPORTANT REMINDERS!

*\*For this report to generate the correct information, you will first need to mark those that you have MATCHED with as "will start" on their application status, otherwise you will not get the correct people's information on your spreadsheet when you export it.*

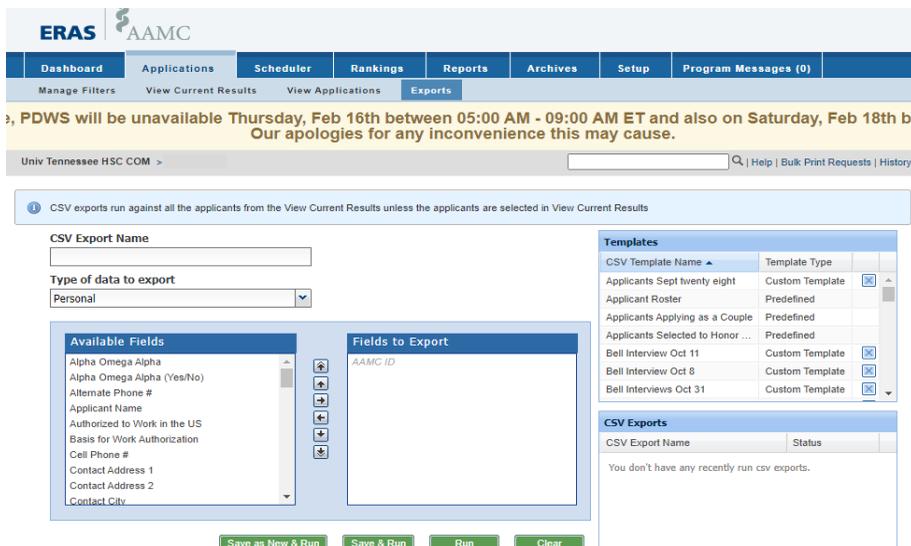
*\*\*This whole process **CANNOT** be completely imported into New Innovations until **AFTER MATCH DAY** and your new people have received notice of where they have matched to, or they will receive an email from New Innovations notifying them they need to create their login information.*

## Creating your export template:

- 1) Log into ERAS and hover over the **Applications** tab and choose **Exports**.
- 2) Under Favorites choose **Add a new export template**.



- 3) Your screen should look like this.



- 4) On this screen you will use the drop-down list (#4) to select the different sub-categories you would like to export on your spreadsheet as column headers (#5). We have broken down each category with what needs to be moved over to the right column and what the correct order is to have each criterion on the list.

The screenshot shows the ERAS AAMC Exports interface. At the top, there are navigation tabs: Dashboard, Applications, Scheduler, Rankings, Reports, Archives, Setup, and Program Messages (0). Below these are sub-tabs: Manage Filters, View Current Results, View Applications, and Exports. A yellow banner indicates a system outage: "PDWS will be unavailable Thursday, Feb 16th between 05:00 AM - 09:00 AM ET and also on Saturday, Feb 18th between 05:00 AM - 09:00 AM ET. Our apologies for any inconvenience this may cause." Below the banner is a search bar and a link to "Univ Tennessee HSC COM".

The main content area has a blue header with an information icon and the text: "CSV exports run against all the applicants from the View Current Results unless the applicants are selected in View Current Results". Below this is a form for creating a CSV export. The "CSV Export Name" field is empty. The "Type of data to export" dropdown is set to "Personal", with a red arrow labeled "4" pointing to it. Below this are two columns: "Available Fields" and "Fields to Export". The "Available Fields" list includes: Alpha Omega Alpha, Alpha Omega Alpha (Yes/No), Alternate Phone #, Applicant Name, Authorized to Work in the US, Basis for Work Authorization, Cell Phone #, Contact Address 1, Contact Address 2, and Contact City. The "Fields to Export" list contains "AAMC ID", with a red arrow labeled "5" pointing to it. Between the two columns are four arrows: a plus sign, a left arrow, a right arrow, and a minus sign. At the bottom of the form are four buttons: "Save as New & Run", "Save & Run", "Run", and "Clear".

To the right of the form is a "Templates" table with columns "CSV Template Name" and "Template Type". It lists several templates, including "Applicants Sept twenty eight", "Applicant Roster", "Applicants Applying as a Couple", "Applicants Selected to Honor ...", "Bell Interview Oct 11", "Bell Interview Oct 8", and "Bell Interviews Oct 31". Below the templates is a "CSV Exports" section with a table for "CSV Export Name" and "Status", which currently shows "You don't have any recently run csv exports."

- 5) You are then going to select the criteria so that it matches the fields listed below. If your program wants anything extra, you can easily select the criteria specific to your program.

**ALL EXPORTS START WITH:**

*(this is a preselected field that can't be changed.)*

**EXAMS/LICENSES/CERTIFICATIONS:**

- AAMC ID
- APPLICATION STATUS:**
- Will Start
- PERSONAL:**
- |                     |   |
|---------------------|---|
| ▪ First Name        | ▪ Contact State                             |
| ▪ Middle Name       | ▪ Contact Zip                               |
| ▪ Last Name         | ▪ Contact Country                           |
| ▪ Preferred Name    | ▪ Hometown(s)                               |
| ▪ Self-Identify     | ▪ Current Work Authorization                |
| ▪ Gender            | ▪ Authorized to Work in the US              |
| ▪ Date of Birth     | ▪ Couples - Partner Name                    |
| ▪ E-mail            | ▪ Couples - Partner Specialty               |
| ▪ Preferred Phone   | ▪ Hobbies and Interests                     |
| ▪ Cell Phone #      | ▪ Military Service Obligation               |
| ▪ Contact Address 1 | ▪ Military Service Years Remaining          |
| ▪ Contact Address 2 | ▪ Graduate of US or Canadian Medical School |
| ▪ Contact City      |   |

- USMLE Step 1 Score
  - USMLE Step 2 CK Score
  - USMLE Step 2 CS Score
  - USMLE Step 3 Score
  - COMLEX-USA Level 1 Score
  - COMLEX-USA Level 2 CE Score
  - COMLEX-USA Level 2 PE Score
  - COMLEX-USA Level 3 Score
  - ACLS Expiration Date
  - BLS Expiration Date
  - PALS Expiration Date
- EDUCATION:**
- Medical School Clinical Campus
  - Medical School Attendance Dates
  - Medical School Degree Date of Graduation
  - Medical Degree Expected or Earned
  - Medical School State/Province
  - Medical School Country
  - Medical School Type
  - Medical School of Graduation
  - Medical Education or Training Interrupted

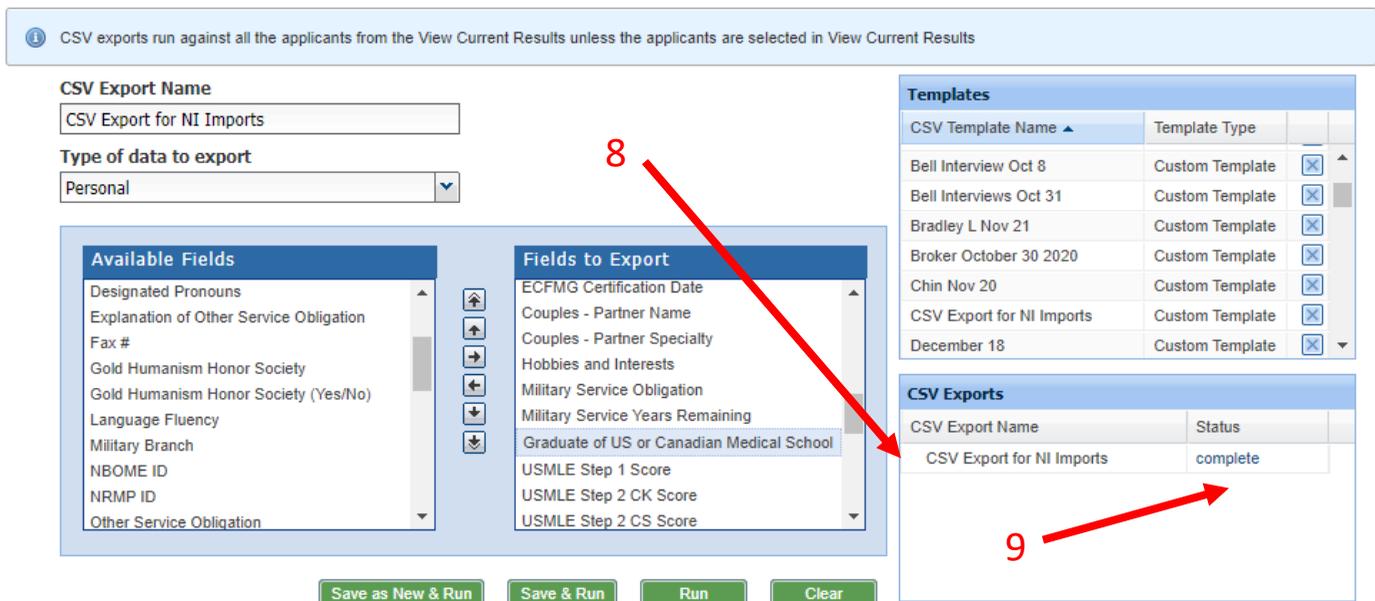
- 6) Once you have finished selecting your sub-categories and you have moved them up/down to where you want them to appear on your spreadsheet, you will click the green button at the bottom that says, **(#6) "Save as New & Run"**.



- 7) Then a little window will pop up that looks like this. Click the green **(#7) "OK"** button to finish running the report.



- 8) Now your report should be ready to export. You will see it appear in the **(#8) "CSV Exports"** box at the bottom right.



- 9) Click on the word **(#9) "Complete"** to start the export.  
10) Now go to your "Downloads" folder on your computer and open the Excel CSV file that was just downloaded to your computer.

**\*\*\*Most Important Step when Saving this file:**

Make sure you go to **File** → **Save As** → change the file to an **"Excel Workbook (\*.xlsx)"** file type otherwise you will lose any modifications you make to this file when you close it.