

# Import ERAS Data

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## See Also

1. [ERAS Field Reference](#)
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## Notes

The information contained in this document is intended for administrative use

## About ERAS Import

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The *Import ERAS Data* tool automates Personnel Data entry for new residents using data exported from the ERAS (Electronic Residency Application Service) system. Common information such as the program, start/end dates and status may be set for the group of people during the import process while the primary data transferred to each Demographic Record is derived from the information contained in the ERAS file.

## Results of the Process

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The following results occur for all individuals including in the data import:

Creation of Demographic Record in Personnel Data

Assigns the Program that was designated during the import setup.

Assigns the Status Type, Post Graduate Year, and Compensation Status according to the selected Program settings for a first-year resident, fellow, or intern.

Assigns a Username and Password. This option may be turned off during the import setup.

Assigns a 'Resident' Privilege Level Preset.

If configured, assigns the employer for each individual to that Location/Institution name. The Employer value is necessary for institutions using IRIS [see [Institutions/Locations](#) and [IRIS Overview](#) for further details].

Transfers relevant data fields from the ERAS record to the corresponding fields of each Demographic Record in Personnel Data [see [ERAS Import Data Field Reference](#) for further details].

## ERAS Import Terms

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### Advancement Date

*Advancement Dates* are setup for each Program created in the database. This Program Advancement Date is recorded in the Advancement Information section of each demographic record when individuals are added to the database and identified with their respective programs. The Advancement Date serves to indicate the date that people transition to the next phase of their training program and assist in the database system in conducting automatic annual updates of time-sensitive data fields in user records. Advancement Dates may be modified independent of the program date [see [Programs](#) or [Auto Advancement](#) for further details]

### Advancement Values

Program, Program Start/End Dates, Employer, Start/Hire Date, Status Type, Advancement Date, Post Graduate Year (PGY), and Compensation Status may all be updated. Setting advancement values for individuals who have an existing demographic record in the software suite will update the advancement values.

### Auto Advancement

The *Auto Advancement* feature conducts annual automatic updates of the Status Type plus additional time-sensitive fields in the *Basic Information* section of each relevant Demographics Record [see [Auto Advancement](#) for further details].

### Status Type Advancement Path

Defines the next Status Type a person will receive when they advance to the next level of their training program. Required along with the existence of an Advancement Date to trigger Auto Advancement, unless a 'Next Status' value has been entered into the *Advancement Information* section of an individual's Demographics Record.

### Update Advancement Values Feature

Part of the *Import ERAS Data* tool used to manage individuals, usually medical students, who are included in the ERAS file but cannot be imported because they already exist in RMS. The *Update Advancement Values* feature simply updates advancement-related data in RMS for each of these individuals so that upon Auto Advancement they can be processed similarly to the people who were imported.

## Required Privileges

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Level 5 or 6 privilege in Personnel Data is required for access to the Import ERAS Data tool.

Level 6 privilege in Personnel Data is required to update advancement values of existing records.

[see [Assign Privileges](#) for further details].

### Level 6 Customized Security Options

Customized Security options in Administration also allow Level 6 users to:

- Restrict Level 5 access to the ERA Import Tool

- Enable/Disable the ability to update advancement values of existing records.

[see [Assign Privileges](#) and [Customized Security](#) for further details].

## Preparation

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The following items should be checked to ensure that records are properly imported/updated and will properly advance on the next Auto Advancement Date.

- Set a *Program Advancement Date* [see [Programs](#) for further details].

- Configure a *Status Advancement Path* [see [Status Advancement](#) for further details].

If your Program or institution uses the Billing module, then a *Compensation Status Advancement Path* will also need to be configured [see [Compensation Advancement](#)].

## Import ERAS File

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Before beginning this step, export one or more tab-delimited data files from ERAS and save them to a local or network drive.

Instructions for downloading the ERAS data file may be found on the [AAMC web site](#).


A separate ERAS extract/text file is required for each Program. Including First Name, Middle Name, Last Name and SSN or SIN (social security number or social insurance number) are required for the data extract however including *all available* fields from ERAS is the best option since any data not used in the suite will not be imported.


1. Select Main > Personnel Data.
2. Go to Tools > Import ERAS Data.
3. Select a Program the drop-down box and enter the projected Program Start/End Dates.

### Define RMS Values

**Note:** Each person imported will be automatically assigned the RMS values entered here.

\* Program:


Program Start Date (Projected):  

Program End Date (Projected):  

Programs are associated with Departments/Divisions therefore the selection will determine where in the database the individuals will be assigned upon import.

4. Enter Start/Hire Date and if your institution is using the IRIS module select an Employer.

§ Employer:

Start/Hire Date:  

The Employer field is only required by Programs and institutions that use the IRIS module. The Employer value will default to the Institution/Location that owns a training Program, if that relationship has been established [see [Maintain Institution/Department Ownership](#) for further details]. You may override that default with another Employer or select the '---' option to enter no Employer.

5. Confirm Create Username/Password check box.

Create Username/Password:

The Create Username/Password box is checked by default and will create a database Username and Password each imported person. Initial Username and Passwords are composed of the first initial of the first name followed by the last name, all lower case, no spaces (*i.e. John Doe's would be 'jdoe'*). In the case of duplicate combinations the system will add the second initial of the first name to the combination (*i.e. if 'John Doe already has the 'jdoe' combination then Jane Doe's username/password will be 'jadoe'*).

6. Select a Current Value for Status Type from the Status drop-down box.

### Status and Advancement

**Current Values:**


\* Status:

Current Status Type is the status that the incoming group will have immediately upon import. Incoming statuses are recommended for all trainees who have yet to begin their program.

The 'Incoming Resident/Fellow' are default system status types used to distinguish between preliminary trainees and current first year residents/fellows who have yet to advance.

7. Select Advancement Values for **Advancement Date**, **Status**, **Post Graduate Year (PGY)**.

**Advancement Values:**

\* Advancement Date:  

\* Status:

§ Post Graduate Year (PGY):

*Advancement Date* – This date represents the annual transition to the next phase of the program.

*Status* – Select the status type that the group will advance to on the next Advancement Date.

*Post Graduate Year (PGY)* – This number should be set to the number the imported group will be on the next advancement date. When importing Incoming Residents prior to the start of the academic year this should be set to '1' since their first advancement date will be the beginning of the academic year when their status changes to first year residents.

8. Select a Compensation Status (if applicable)

Compensation Status:

Compensation Statuses are only required by institutions using the Billing module. [see Compensation Status or further details].

9. Click the **Select** button and locate the ERAS tab-delimited text file.

**Import People**

\* ERAS File:

[Import ERAS File](#)

10. Click **Import ERAS File**.

11. If needed, select an RMS Medical school from each drop-down box.

Drop-down boxes only appear when the medical school contained in the ERAS file does not exactly match any medical school that has been entered into RMS (go to *Administration > Global Setup > RMS Schools*).

If an RMS medical school cannot be found that matches the imported medical school, you may add a new RMS medical school [see *RMS Schools* for further details]. In some institutions, only Level 6 Administrators (GME personnel) will be able to add Medical Schools.

If an imported school remains unmatched to an RMS school, the individual will be imported, but his or her Medical School will not be entered into the *Education History* section of their Demographics Record.

**Match Medical Schools**

**Note:** The imported medical schools on the left did not match any RMS Medical Schools. Select the appropriate RMS Medical School from each drop-down box.

ERAS Medical School	RMS Medical School
George Washington University School of Medicine	<input type="text" value="George Washington University School of Medicine and Health Sciences"/>
Freie Universitat Berlin	<input type="text" value="---"/>

12. Check the names of people to import into RMS. If you would like to manage people who cannot be imported because they already exist in RMS, go to [Update Advancement Data](#). Otherwise, scroll to the *Update Advancement Data* section and clear all the checkboxes. Then, click the **Continue** link, and review the ERAS Import Results.

For each individual, you may compare the ERAS and RMS versions of their first and last name and make corrections in each individual's Demographics Record as needed.

RMS assigns a unique ID to each individual as they are imported.

Any individuals who already have a record in the suite cannot be imported.

Review the *ERAS Import Results* screen to determine if everyone imported as expected. If there are problems, they will be noted in the Details column.

If an individual corrected a mistake in their data in ERAS, such as an address, test score, or birth date, you CANNOT correct the data in RMS by simply re-importing the corrected ERAS file. You would first have to delete the affected individual from RMS and THEN re-import the corrected ERAS file.

Select People to Import		
<b>Note:</b> The people listed below do not exist in your RMS database. Check those you wish to import.		
<a href="#">All</a>   <a href="#">None</a>   <a href="#">Invert</a>		
<a href="#">ERAS First Name</a>	<a href="#">ERAS Middle Name</a>	<a href="#">ERAS Last Name</a>
<input checked="" type="checkbox"/> Cindy	Connie	Braun
<input type="checkbox"/> Bradly		Feg
<input checked="" type="checkbox"/> Jennifer	Elizabeth	Jonson
<input type="checkbox"/> Ajay		Kum
<input type="checkbox"/> Miguel		Lopast
<input type="checkbox"/> Monica		Pat
<input type="checkbox"/> Katrina		Perry
<input type="checkbox"/> Jason		Smit
<input type="checkbox"/> Yaming	Hsu	Zheng
<a href="#">Export to Excel</a>		

ERAS Import Results				
<a href="#">ERAS Name</a>	<a href="#">RMS Name</a>	<a href="#">RMS ID</a>	<a href="#">Action Performed</a>	<a href="#">Details</a>
Jacke, Bob Gabriel	Jacke, Bob Gabriel	3125	Not Imported	Person exists in Infectious Disease
Feg, Bradly		0	Not Imported	
Joseff, Francis Middleton	Josephi, Francis Middleton	3077	Not Imported	Person exists in Infectious Disease
Keo, Michael	Keonie, Michael	3078	Not Imported	Person exists in Infectious Disease
Kum, Ajay		0	Not Imported	
Lopast, Miguel		0	Not Imported	
Pat, Monica		0	Not Imported	
Perry, Katrina		0	Not Imported	
Smit, Jason		0	Not Imported	
Zheng, Yaming Hsu		0	Not Imported	
Braun, Cindy Connie	Braun, Cindy Connie	3126	Imported With Issues	USMLE Step 2 CS test score could not be saved; USMLE Step 3 test score could not be saved
Jonson, Jennifer Elizabeth	Jonson, Jennifer Elizabeth	3127	Imported With Issues	USMLE Step 1 test score could not be saved; USMLE Step 2 CK test score could not be saved; USMLE Step 2 CS test score could not be saved

[Export to Excel](#)

[Perform Another Import](#)

## Update Advancement Data

The people in the Update Advancement Data section have already been entered into RMS. In most institutions, they are medical students. If you check their names, their advancement-related data will be updated. The updated data ensures that they will automatically advance to the appropriate Program and receive the appropriate Status Type (and possibly Compensation Status and Post Graduate Year).

1. Check and clear boxes to indicate which individual's data should be updated, and then click the Continue link.

### Update Advancement Data

**Note:** The people below ALREADY EXIST in your RMS database. You cannot import ERAS data for them, but you may move them to Infectious Disease on that program's advancement date of 7/1. When they move, their current values (displayed below) will be updated to [these values](#).

[All](#) | [None](#) | [Invert](#)

	<a href="#">ERAS First Name</a>	<a href="#">ERAS Middle Name</a>	<a href="#">ERAS Last Name</a>	<a href="#">RMS First Name</a>	<a href="#">RMS Middle Name</a>	<a href="#">RMS Last Name</a>	<a href="#">RMS ID</a>	<a href="#">Work Role (s)</a>	<a href="#">Department/Division</a>
<input checked="" type="checkbox"/>	Bob	Gabriel	Jacke	Bob	Gabriel	Jacke	3125	Resident	Infectious Disease
<input checked="" type="checkbox"/>	Francis	Middleton	Joseff	Francis	Middleton	Josephi	3077	Resident	Infectious Disease
<input checked="" type="checkbox"/>	Michael		Keo	Michael		Keonie	3078	Resident	Infectious Disease

[Export to Excel](#)

**Note:** Disabled checkboxes indicate that the associated person is archived in the RMS database. People who have been archived in the RMS cannot be updated.

**Continue**

2. View the ERAS import results and make corrections if desired.

[Configure Residency History Record](#)

Advancing Statuses				
	<a href="#">Status Type</a>	<a href="#">Next Status Type</a>	<a href="#">Advance Status Type Only</a>	<a href="#">Archive On Advancement</a>
<a href="#">Edit</a>	Admin Staff			
<a href="#">Edit</a>	Asst Prog Director			
<a href="#">Edit</a>	EAST			
<a href="#">Edit</a>	Faculty			
<a href="#">Edit</a>	Fel-1			
<a href="#">Edit</a>	Graduate			
<a href="#">Edit</a>	Incoming Fellow	Fel-1		
<a href="#">Update</a> <a href="#">Cancel</a>	Incoming Resident	PRG-1	<input type="checkbox"/>	<input type="checkbox"/>

## Reports

Individual Advancement Information

Group Reports

Individual Advancement Information

The Advancement Data that will be assigned to Updated People when they begin their new Program may be viewed in the Advancement Information section of their Demographics Record. Advancement Data for imported individuals will become available upon their Advancement Date.

A history of all changes to the Advancement Information is also accessible from the Advancement Information section of each individual's Demographics Record.

1. Select Main > Personnel Data.
2. Select the individual whose data you wish to view.

Department/Division(s): [Infectious Disease](#)    Work Role(s): ALL/ANY    Active Status: Active Only    [Reload](#)

◀ Zhangs, Yaming Hsu ▶

List contains 30 people matched in the last search



**Zhangs, Yaming Hsu [yzhangs]**  
**Resident in Infectious Disease**  
 Current Status **Incoming Resident in Infectious Disease** [RMS ID#3364]  
 Credentials: **MD**  
 Primary E-Mail: [erashelp@aamc.org](mailto:erashelp@aamc.org)

[Change Photo](#)    **Yaming Zhangs is Active** | [Archive](#) | [Delete](#) | [Reset Password](#) | [Access Assignment Schedule](#) | [Access](#)

3. Scroll to the Advancement Information section and click on the Advancement Information link.

### Advancement Information

- Advancement Date: 7/1
- Next Status: PGY-1
- Next Compensation Status: CS-2
- Next Employer: Baylor Medical
- Next Post Graduate Year: 2
- Next Program/Track: Infectious Disease, Categorical Track (Program Number: 111111)
- Next Program End Date: 6/1/2010
- Next Work Role(s): Resident

4. Update the data if necessary or click the **Show History** link.

The Next Work Role is automatically set to 'Resident' for Imported and Updated People regardless of their Work Role before being updated or the Status Type set in the Define RMS Values section of the Import ERAS Data Update tool.

Individual's Advancement History can be exported to Excel if desired (see second screenshot below).

**Create/Edit Advancement Information**

Advance Date: 7/1

Next Status: PGY-1

Next Compensation Status: CS-2

Next Employer: Baylor Medical

Next Post Graduate Year (PGY): 2



Next Program: Infectious Disease Track: Categorical

Next Program End Date: 6/1/2010

[All](#) | [None](#) | [Invert](#) |

Next Work Role(s):  Administrator  Medical Student  Other  Physician's Assistant  
 Faculty  Nurse  Patient  **Resident**

[Save and Return](#) | [Apply Changes](#) | [Show History](#)

Advancement Information History												
ADVANCEMENT INFORMATION												
Change Date	Change Type	Owner	Advancement Date	Next Status	Next Compensation Status	Next Employer	Next Post Graduate Year	Next Program	Next Track	Next Program End Date	Updated On	Updated By
2/16/2007 8:18:45 AM	Current	Zhangs, Yaming	7/1	PGY-1	CS-2	Baylor Medical	2	Infectious Disease	Categorical	6/1/2010 12:00:00 AM	2/16/2007 8:18:45 AM	NI Personnel
2/16/2007 8:18:45 AM	Update	Zhangs, Yaming	7/1								2/15/2007 4:08:24 PM	NI Personnel
2/15/2007 4:08:24 PM	Insert	Zhangs, Yaming	7/1								2/15/2007 4:08:24 PM	NI Personnel
 <a href="#">Export to Excel</a>												
NEXT WORK ROLES												
Change Date	Change Type	Owner	Work Role	Updated On	Updated By							
2/16/2007 8:18:45 AM	Current	Zhangs, Yaming	Resident	2/16/2007 8:18:45 AM	NI Personnel							
2/16/2007 8:18:45 AM	Insert	Zhangs, Yaming	Resident	2/16/2007 8:18:45 AM	NI Personnel							
 <a href="#">Export to Excel</a>												

[Cancel and Return](#)

## Group Reports

Advancement Data belonging to groups of individuals may be viewed by using the Extract Custom Data tool or the Custom Reports module. The Custom Reports module is more powerful and flexible, yet requires more steps to configure.

See [Extract Custom Data](#) or [Custom Reports](#).

## Overriding Automatically Set Advancement Information

Advancement data is stored in the Advancement Information section of each individual's Demographics Record. When people advance, all but the Advancement Date is cleared.

You may enter or edit data in the Advancement Information section of each person's Demographics Record.

Whatever data has been entered or edited here overrides advancement values set elsewhere.

You may also use the Configure Advancement Dates feature (go to Personnel Data, Setup > Configure

Advancement Dates) to edit or populate multiple Advancement Dates at once.

1. From the Main Menu, select **Personnel Data**.
2. Select an individual from the drop-down list, scroll to the **Advancement Information** section and then click on the hyperlinked **Advancement Information** section heading.

Black, Bob Gabriel [bblack] Search  Include Archived/Legal  
 List contains 30 people matched in the last search Add New Person | Advanced Search

**Black, Bob Gabriel [bblack]**  
**Resident in Infectious Disease**  
 Current Status **Incoming Resident in Infectious Disease** [RMS ID#3073]  
 Credentials: **M.D.**  
 Primary E-Mail: [myeras@aamc.org](mailto:myeras@aamc.org)  
**Bob Black is Active** | [Archive](#) | [Delete](#) | [Reset Password](#) | [Access Assignment Schedule](#) | [Access Block Schedule](#) | [Print Prescription Pad](#)

[Change Photo](#)

Categories: [Customize](#) | [About History](#) | [Deleted Items History](#)

**Create/Edit Advancement Information**

**Advancement Information**

Advancement Date: 7/1  
 Next Status: PGY-1

3. Edit the data as needed and click the **Save and Return** link.

Tip: Click the **Apply Changes** link to keep the Advancement Section open. You may then select another individual and that person's Advancement Section will already be open.

Individuals will receive the new data on the Advance Date.

**Create/Edit Advancement Information**

Advance Date: 7/1

Next Status: MS-1

Next Compensation Status: ---

Next Employer: Baylor Medical

Next Post Graduate Year (PGY): 1

Next Program: Infectious Disease Track: ---

Next Program End Date:

[All](#) | [None](#) | [Invert](#)

Next Work Role(s)

Administrator  Medical Student  Other  Physician's Assistant

Faculty  Nurse  Patient  **Resident**

[Save and Return](#) | [Apply Changes](#) | [Show History](#)

## Troubleshooting ERAS Imports

### The ERAS Import Tool is not available

A Privilege Level 5 or 6 in the Personnel Data row of the Privileges Table is required to use the Import ERAS Data tool to import people. By default only Level 6 users may use the *Update Advancement Values* feature however Level 6 users may configure *Customized Security* to permit Level 5 administrators to use this feature [see [Permit Level 5 Personnel to Update Advancement Data](#)].

**Cannot import more than one program at a time**

When importing ERAS data, you must import to one Program at a time. If you need to import people into multiple Programs, create multiple text-delimited ERAS files. Each one should only contain people who will be assigned to the same Program.

#### **Determining Status when importing new residents prior to the start of an Academic Year**

When importing or updating people who will become residents or fellows on the Advancement Date, assign a Status Type of 'Incoming Resident' or 'Incoming Fellow.' If a 'next Status Type' is defined in the Status Type Advancement Path, they will automatically advance to their new Program on the Advancement Date and be assigned the appropriate Status Type.

#### **Post Graduate Year designation for IRIS**

Post Graduate Year (PGY) is only used if your institution uses the RMS IRIS module. Select a PGY of '---' if you want Imported or Updated people to be assigned a PGY of '1' when they automatically advance to their new Program.

#### **Compensation Status for Billing**

Compensation Status is only required if your Institution or Program uses the RMS Billing module. If you want Imported and Updated People to be automatically assigned the appropriate Compensation Status when they advance to their new Program, you must create one or two new Compensation Statuses (such as 'Incoming Resident CS' and 'Incoming Fellow CS') to assign them when they are Imported or Updated. On their Advancement Date, they will then be automatically assigned the next Compensation Status(es) in the Compensation Status Advancement Path.

#### **Importing without a matching Medical School**

If an imported school remains unmatched to an RMS school, the individual will be imported, but his or her Medical School will not be entered into the *Education History* section of their Demographics Record.

#### **Destination Programs**

Imported People are immediately assigned to the Destination Program. Updated people remain in their existing Program until the Advancement Date; then, they are moved to the Destination Program.

#### **Setting or Overriding the Advancement Date**

The Advancement Date for Imported People and Updated people is automatically set to the date associated with the Destination Program. This date can be overridden by entering or editing an Individual Advancement Date in the Advancement Information section of each individual's Demographics Record.

#### **No Advancement Date**

If there is no Advancement Date associated with the Destination Program, Imported People will not be assigned an Advancement Date, and you will not be able to update people.

#### **Re-Importing Corrected Records**

If an individual corrected a mistake in their data in ERAS, such as an address, test score, or birth date, the data cannot be corrected in the system by re-importing the corrected ERAS file. Affected records need to be deleted and so the new import is able to generate a clean record without any conflicts.

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## ERAS Import/Update Behavior

UPON IMPORT OR UPDATE		
Field	Imported People	Updated People
Program	Moved to destination Program	Remain in current Program
Default Advancement Date	Destination Program's Advancement Date	Selected Program's Advancement Date
Status Type	Initially assigned 'Incoming Resident' or 'Incoming Fellow'	Initially assigned 'Incoming Resident' or 'Incoming Fellow'
Post Graduate Year	Initially assigned '----' type	
Compensation Type	Initially assigned 'Incoming Resident CS' or 'Incoming Fellow CS'	Initially assigned 'Incoming Resident CS' or 'Incoming Fellow CS'

ADVANCEMENT BEHAVIOR		
Field	Imported	Updated
Program	Remains in Destination Program	Moves to Destination Program
Status Type	Changes to Next Status Type defined by Destination Program	Changes to Next Status Type defined by Destination Program
Post Graduate Year	Changes to '1'	Changes to '1'
Compensation Type	Changes to Next Compensation Type defined by Destination Program	Changes to Next Compensation Type defined by Destination Program