How to INVITE AN APPLICANT:

In order to invite an applicant to interview through ERAS "Scheduler" first click on
  - Applicants tab
  - View Current Results
  - Click the check box located by the names of applicants you wish to invite to interview
  - Click bottom tab "Action to perform on selected applicants" choose from the drop down "update status" then "Go"
  - Click on "Interview" + tab
  - Under selected to interview click on the middle "check" button
  - Click "Apply" then "Close"

This moves your applicants over to the "Scheduler". Go to the Scheduler tab and send the invitation to interview.

How to create CUSTOM REPORTS:

  - From the Dashboard, click on the Applications tab,
  - Click on Exports in the light blue line, you'll see some predefined templates which are nice, but not helpful when you want specific info.
  - Click on the green + 'add a new export template'

  - Give your report a name in the CSV Export Name Box (btw, CSV stands for Comma Separated Value…uh huh, whatever…)

  - In the Type of Data to Export box just below, Click on the down arrow and you will see several categories of data. Choose a category(s) from the Available Fields box below. If you want more than one Control click them and move them over the Fields to Export box.

  - Go through *all* the Types of Data to Export, selecting what you want your report to contain and *then* you can move the Fields to Export up and down in the Fields to Export box to get them in the order you want them to appear in in your report.

You have several options below in the green boxes to save/run your new report:
  - If you choose to save it, it will appear in the Templates box on the upper right side of the page and will be noted as a custom template.
  - If you choose to run it, a pop-up box will appear and say 'your CSV is scheduled' – click OK and it appears in the CSV Exports box on the bottom right. The status will change from pending to complete. Click on complete and your report will magically appear!

DECLINED FOR INTERVIEW (multiple applicants):

Pull up your listing of applicants (mine are in Applications, Manage Filters, Composite Score)
Check all the applicants who will not be invited for interviews (you can click on hundreds)
Scroll to the bottom of the page
Action to perform on selected applicants: On the dropdown menu, select Bulk Messages
Click on Go
If you have already written a "Sorry, no interview" letter and saved it as a template, under Template (Optional), select that letter on the dropdown menu
If you aren't using a template, type in your message
Add in a subject
Click on Send

SEARCH FOR APPLICANTS WITH MISSING DOCUMENTS/application not complete

Manage filters
Add new filter
Applicant type: **Active applicants**
Click Add Group: **Show results matching ANY criteria in this group**
    (right hand side click green tab "Add new criteria")
Category: **Scroll down to Application Status**
Field: **Scroll down to Incomplete application**
Condition: **Equals**
I **only** checked the '**Yes**'
Save criteria
Apply