# **APPLICATION MANAGEMENT USER GUIDE**

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### APPLICATIONS

**EDIT CATEGORIES** – There are six available fields to create values. SF Match has input default values that can be edited/updated real time for the needs of your program. Assign a category value to applicants (visible in Category column).

Note: Edits made to the Categories legend are viewable by all users at your program.

		Ophthalı	mology Fellov	wship - Retina							Impersonated	1	
Ho	me / Application	s 🗸 6 (	Completed	₿ 2 Incomplete	Search 🔻	Search applications							٩
A	Actions (2) 🔻	්ල CAS U	Jpdates		Categories	Edit Categories	1 Great Candio	date <b>2</b> Review La	iter 3 Not Sure	4 No 5 Go	od Exam Score	6 Ask Dire	ector
	Applicant		Li	ast Residency		Assignee	Completed	First Delivery	Updated	Reviewed	Category	Note I	Interview
	#33367 Rebecca R Bur	ton , MD	В	aylor College of Mec	licine	Justin Young	g 🖌	07/02/2020		08/01/2020	1		
	#29915 Andrew Cox		U	ISC Roski Eye Institut	e		đ						
	<sup>#60054</sup> Sara Y Curry ,	MD	R	utgers New Jersey M	ledical School	Justin Young	g 🗸	07/06/2020		08/01/2020	1		
	#60041 Amber D Harri	s	S	AUSHEC			ø						
Vills B	Eye Hospi	tal- Re	tina										
nology	y Fellows												
		Edi	t Cat	tegorie	S			×					
iomp	leted					Update de	escriptio	ns					
		1	Croot	Canadidata		Officia	values						
pdate	es		Great	Landidate					te 💈 Re	view La			
		2	Review	Later									
	Las								First Deli	verv			
	200	3	Not Su	re									
	Bay	4	No						07/02/2	.020			
	US	=											
		5	Good E	xam Score									
	Rut	6	Ask Dir	ector					07/06/2	.020			
	SAL		ASK DI										
MS 1	FL								07/07/2	.020			
	Un						Close	Save	07/06/2	020			
	Unive	rsity of	Puerto	Rico				~	07/06/2	.020			

# **ACTIONS BUTTON DESCRIPTIONS:**

Program Menu	Home / Applications <b>45</b> Completed	Search •	Search applications				
Summary	Actions (6) - O CAS Updates	Categories	• Edit Categories	1 Great Candidat	e 2 Review Later	3 Not Sure 4 No	5
<ul> <li>My Program</li> <li>Applications</li> </ul>	Add To Interview List Assign Program User to Applications	tesidency	Assignee	Completed	First Delivery	Updated Reviewed	I
🧔 Interview List	Category	England Eye Center, Tufts Medical Sch	ool	×	07/17/2020		
interview Scheduler	Download Application	ersity of Texas Southwestern		~	07/06/2020		
Rank List	Send Message	University Ophthalmology Residency	Program Jamie Cox	~	08/03/2020		
Program Directory	Review Date		lamio				
Transactions	Zachary M Allen Uni	versity of Texas Southwestern Medical (	Center Cox	×	07/16/2020		
Instructions	Tara Allen , MD Geo	orge Washington University	Jamie Cox	×	07/12/2020	07/13/2020	

• ADD TO INTERVIEW LIST – Edit the status of multiple candidates to "Yes" or "No". The applicants marked "Yes" will appear on the "Interview List" page.

	Hor	me / Applications <b>45</b> Completed	C.R.	<b>5</b> Incomplete	Search <del>•</del>	Search applications				
	A	cctions (5) ▼ ්ා CAS Updates			Categories	Edit Categories	1 Great Candida	ate <b>2</b> Review La	ater 3 Not Sure	4 No
Ľ	٦	Applicant		Interview	lict		×	st Delivery	Updated	Reviewe
1		#33628 Crystal Adams , MD 1	_	menview	LISU			/17/2020		
	•	#60043 Benjamin A Adams		Change the Interview	list status for 5	applicant(s).		/06/2020		
		#32996 Kelly L Allen 1		Add to Interview list				/03/2020		
		#60324 Zachary M Allen		Select				/16/2020		
		#33265 Tara Allen , MD 2		Yes				/12/2020	07/13/2020	
		#32991 Ashley Anderson , MD 1		Not defined	61051			/04/2020		
		#32868 Ryan M Anderson		versity of southern	California, Nos	a cyc mstate	_	J./27/2020		
		#33094 Shannon P Anderson , MD 2	Uni	versity of Puerto Ri	со		~	07/06/2020	08/05/2020	
		#18382 Angela A Brown , MD 2	KY	- U Louisville (3345)	(Ophthalmolog	gy)	~	07/21/2020	07/23/2020	
		#60904 Donna Brown 1	Lou	iisiana State Univer	sity Health Scie	nce Center	~	07/27/2020		

Home / Applications <b>45</b> Completed	Search ▼ Search applicatio	ns	٩
Actions (0) 👻 🔭 CAS Updates	Categories 🌣 Edit Categories	1 Great Candidate 2 Review Later 2 Not Sure 🕻 No 💈 Good Exam Score 6 Ask	Director
Applicant	Last Residency	Completed First Delivery Updated Reviewed Category Note	Interview
Crystal Adams , MD	New England Eye Center, Tufts Medical School	✓ 07/17/2020	Yes
Benjamin A Adams	University of Texas Southwestern	✓ 07/06/2020	Yes
Kelly L Allen	Duke University Ophthalmology Residency Program	✓ 08/03/2020	Yes
Zachary M Allen	University of Texas Southwestern Medical Center	✓ 07/16/2020	Yes
Tara Allen , MD	George Washington University	✓ 07/12/2020 07/13/2020	Yes
Ashley Anderson , MD 1	University of Illinois at Chicago	✓ 08/04/2020	
Ryan M Anderson	University of Southern California, Roski Eye Institute	✓ 07/27/2020	

The "Interview" column will be updated with the status change.

**Note:** Applicants with "Yes" status are eligible to receive interview invitations through the SF Match system.

• ASSIGN PROGRAM USERS TO APPLICATIONS – Assign a program user to review an application.

Note: All program users have access to download any/all applications. The program user assigned to review an application will see the applicant names highlighted when he/she logs into the SF Match system.

PROGRAMS - #4045 U lov Ophthalmolog	<b>va - Retina</b> sy Fellowship - Retina					_	Jam Impe	e Cox rsonated	Log Out
Home / Applications	pleted 🔁 5 Incomplete Search 🔻 bearch	applications							٩
Actions (0) - OCAS Upda	tes Categories 🗢 Edit Ca	ategories	1 Great Candidate	e 2 Review Later	r 3 Not Sure	4 No	5 Good Exam Score	6 Ask D	irector
Applicant	Last Residency	Assignee	Completed	First Delivery	Updated	Reviewed	Category	Note	Interview
Crystal Adams , MD	New England Eye Center, Tufts Medical School		×	07/17/2020					Yes
Benjamin A Adams	University of Texas Southwestern		~	07/06/2020					Yes
Kelly L Allen	Duke University Ophthalmology Residency Program	Jamie Cox	~	08/03/2020					Yes
<ul> <li>#60324</li> <li>Zachary M Allen</li> </ul>	University of Texas Southwestern Medical Center	Jamie Cox	~	07/16/2020					Yes
#33265 Tara Allen , MD	George Washington University	Jamie Cox	~	07/12/2020	07/13/2020				Yes
Ashley Anderson , MD 1	University of Illinois at Chicago		~	08/04/2020					
Ryan M Anderson	University of Southern California, Roski Eye Institute	2	~	07/27/2020					

• **CATEGORY** – Assign candidates to a specific category value. The category column will update with the value added.

t Res	idency			Assignee	C	ompleted	d Fin	st Delive	
w Er	ngland Eye Ce	Change category for 6 app	olicati	on(s).		~	07	/17/20	
iver	sity of Texas S	Category				~	07	/06/20:	
ke U	Iniversity Oph	Not set				~	08	/03/20:	
iver	sity of Texas S	2			Н	~	07	/16/20:	
orge	Washington	3				~	07	/12/20:	
iver	sity of Illinois at C	5				~	08	/04/20:	
iver	sity of Southern (	о Сантогна, козкі суе пізни	le			~	07	/27/20:	
Но	me / Applications 🛛 🖌 65 Comple	eted 🛛 🔁 5 Incomplete Search 🔻 Search ag	oplications						٩
A	Actions (6) 👻 🕚 CAS Updates	Gategories 🌣 Edit Cate	egories	1 Great Candida	ate 2 Review Li	ater 3 Not Sure	4 No 5 G	ood Exam Score	6 Ask Director
	#33628	Last Residency	Assignee	Completed	First Delivery	Updated	Reviewed	Category	Note Interview
	Crystal Adams , MD #60043	New England Eye Center, Tufts Medical School		~	07/17/2020			<b>~</b> "	Yes
	Benjamin A Adams	Duke University Onbthalmology Residency Program	Jamie	× 	07/06/2020			U	Yes
	#60324 Zachany M Allen	University of Texas Southwestern Medical Center	Cox Jamie	· ·	07/16/2020			n	Yes
	#33265	George Washington University	Cox Jamie		07/12/2020	07/13/2020			Ves
	#32991	University of Illinois at Chicago	Cox	-	09/04/2020				
	#32868	University of Southern California. Roski Eve Institute		* 	07/27/2020				
	#33094 Shannon P Anderson , MD 2	University of Puerto Rico		· · · · · · · · · · · · · · · · · · ·	07/06/2020	08/05/2020			

• **DOWNLOAD APPLICATION** – Download multiple applications at one time. Once the request has been made, you will receive an e-mail (duplicate notification in your message box) when the pdf files of the applications are complete and ready to view.

**Step 1)** Check the boxes next to the applications you want to download, click "Download Application" and select "Request".

	PR	OGRAMS  Ophthalmology F	ellows					B
	Hor	me / Applications 🛛 🛩 65 Comple	eted	Select sections		×		
				Select all	Note:		_	
	A	Actions (4) T 3 CAS Updates		Application Coversheet	application are		2 Review Later 3 Not Sure	4 No 5 Go
		Applicant	Last	Profile	selected by default.		rst Delivery Updated	Reviewed
		#33628 Crystal Adams , MD	Nev	<ul> <li>Examinations</li> <li>Education</li> </ul>			7/17/2020	
		#60043 Benjamin A Adams	Univ	Personal statement			7/06/2020	
		#32996 Kelly L Allen	Duk	Employment			8/03/2020	
		#60324 Zachary M Allen	Univ	Additional Info     Publications			7/16/2020	
		#33265 Tara Allen , MD	Geo	<ul> <li>Honors/Interests</li> <li>Documents</li> </ul>			7/12/2020 07/13/2020	
~		#32991 Ashley Anderson , MD	Univ	C LORs			3/04/2020	
		#32868 Ryan M Anderson	Univ				7/27/2020	
		#33094 Shannon P Anderson , MD 2	Univ		Close	est	7/06/2020 08/05/2020	
		#18382 Angela A Brown , MD 2	KY -	U Louisville (3345) (Ophthalmology)	) <b>~</b>	U	07/21/2020 07/23/2020	

# **Step 2)** SF Match system will e-mail you a link to download the zip file containing pdf files of each application.

Brogram pame: New York Institute		
Frogram name, new fork institute		
Specialty: Ophthalmology		
Subspecialty: Glaucoma		
https://059987482000-uploads-prod.s3.amazonaws AWSAccessKeyld=AKIAQ354ILDQI4CNTW37&Expir	.com/documents/2020_Ophthalmology_Fellowship_for_2021_positions_applications_0e es=1612800307&response-content-disposition=inline&Signature=u%2BhZNY&KYIPqG	Scb673-6cea-4f40-9f6f-70b0ee090bb0.zip? FsV8L2EfVpKNKw%3D
	tan Bant Nam	-
Applicant ID	Applicant Nan	ae
60475 Applicant ID	Amber Collins	1e
60475 60470	Amber Collins Amy A Curry	16
Applicant ID 60475 60470 60154	Amber Collins Amy A Curry Jason Lee, MD	10
Applicant ID 60475 60470 60154 32944	Amber Collins Amy A Curry Jason Lee, MD Kelly D Moore	16
Applicant ID 60475 60470 60154 32944 60780	Amber Collins Amy A Curry Jason Lee, MD Kelly D Moore Richard S Roberts MD	10

**Note:** To download a single application file, click the name of the applicant and select "Download". The file will download immediately.

Home / Applications <b>465</b> Completed <b>5</b>	Incomplete	Search - Search	h applications					۹
University of Texas Southwestern								
Kelly L Allen     Duke University Ophthalmology Residency Program     Jan	nie Cox	Ashley An	derson #32991			2 Download	😭 Send Email	×
Zachary M Allen     University of Texas Southwestern Medical Center     Jan	1 mie Cox	Assigned to N	lot assigned 🛛 🗸 🗸					
Correct Page 201265 Tara Allen , MD George Washington University Jan	1 mie Cox	GENERAL Applicant	ADDITIONAL INFO (CAS) DO Exams/Certification Education	CUMENTS PERSONA	ublications H & I			
Ashley Anderson , MD University of Illinois at Chicago	8	APPLICANT IN	FO					
Note		ID:	32991	Home phone:	630-456-8042			
		Cell phone:	630-456-8042	Pager:				
	2	Email:	Ashley_Anderson_b9eab80b@s	fm.com				
Review date Category		Address:	2821 N Cambridge Ave, Apt 2, 0 Illinois, 60657, United States	.hicago,				
MM/DD/YYYY	×	EXAMS/CERTIF	ICATION					
Add to Interview list			100000					
Not defined	Save	USIVILE ID: 53	462826					
		Steps	E	late	Score			
		Step 1		6/10/2015	256			

• **DOWNLOAD EXCEL REPORT** – MS Excel spreadsheet with applicant information including medical school, letter writer information, exam history, contact e-mail/phone/address.

**Note:** Inputs that you have entered such as Reviewed Date, Category, Add to Interview List values will be updated on the spreadsheet.

 SEND MESSAGE – Message is sent to applicant via e-mail and through the SF Match messaging system.

**Note:** When sending a message to multiple applicants, the applicants will not see the contact information of other recipients.

Se	nd message											×	berso
RECIPII 2 1 Iser	ENTS Crystal Adams , MD (#33628) University of Athens School of Health Sciences	×	Subject <sup>a</sup> Test e	* -mail									
'Iser	Benjamin A Adams (#60043) University of Arizona College of Medicine-Phoenix	×	×=		B	I	<b>U</b> ntlv	E	E	S	Cations and will cand invites in the payt two weeks. That		
'Iser	Tara Allen , MD (#32396) Michigan State University College of Human	×	yo	u for y	ou int	erest	in o	ur pro	ogram	I	adons and win send invices in the next two weeks. Thu		
1	Medicine Ashley Anderson , MD (#32991) U Illinois College of Medicine - Chicago	×											
	Ryan M Anderson (#32868) U Southern California - Keck School of Medicine	×											
	U Puerto Rico School of Medicine	×	Do	not allo	w repl	у							
			Attach You can	ments edit the a	ittachm	ent nan	ne.						
	Ashim Andorran, MO		Send	A	ttach F	iles (u	p to ′	10)					

• **REVIEW DATE** – Input the date application has been reviewed.

	Summary		A	ctions (2) 👻	්ට CAS Updates		Categories	Edit Cate	gories	1 Great C	Candidate	2 Review Lab	er 3 Not Sure	4 No	5 Good Exam	icore 🤇	Ask Dir	rector
	Applications	Ľ.	0	Applicant		Last Residency			Assignee	Comple	eted	First Delivery	Updated	Reviewed	Cate	gory	Note	Interview
<b>_</b>	Interview List	1		#33628 Crystal Adams	, MD	New England Eye Center,	Tufts Medical So	hool		~		07/17/2020		08/05/20	20			Yes
	Interview Scheduler			#60043 Benjamin A Ad	ams	University of Texas South	western			~		07/06/2020		08/05/20	20			Yes
1	Rank List			#32996 Kelly L Allen		Duke University Ophthaln	nology Residenc	y Program	Jamie Cox	~		08/03/2020		08/05/20	20			Yes
	Program Directory Transactions		~	Zachary M Alle	n	University of Texas South	western Medica	Center	Jamie Cox	~		07/16/2020		08/10/20	20	I		Yes
?	Instructions			#33265 Tara Allen , MD	)	George Washington Unive	ersity		Jamie Cox	~	(	07/12/2020	07/13/2020	08/05/20	20			Yes
	Specialty 🗸			#32991 Ashley Anderse	on , MD	University of Illinois at Ch	icago			~	(	08/04/2020				I		
			~	Ryan M Anders	son	University of Southern Ca	lifornia, Roski Ey	e Institute		~	(	07/27/2020		08/10/20	20			
				#33094	-													

### • ENTER NOTES:

Click the name of the applicant to bring display their profile page. Enter notes and click the "Save" button. An icon will appear to show when there are notes written about a candidate.

Home / Applications 45 Com	npleted 🛛 🕄 5 Incomplete	Search - Search applic	ations							۹
Categories 🌼 Edit Categories		Benjamin Ada	ams #60	043			🛓 Dowr	iload 💽	Send Emai	>
Great Candidate     Z Review Later     S Good Exam S	Not Sure     Ask Director	Assigned to Not assig	ned	~						
- Actions (2) 🔹 🕲 CAS Upda	ates	GENERAL ADDITI	ONAL INFO (C/	AS) DOCUME	NTS PERSON	AL STATEMENT				
Crystal Adams , MD	0	Applicant Exams/	Certification	Education	Employment	Publications H	8.1			
New England Eye Center, Tufts Medical S	chool	APPLICANT INFO							Benjamin	
860043 Benjamin A Adams	1	ID: 60	043		Home phone:				Adams	
University of Texas Southwestern	-	Cell phone: 52	07894332		Pager:					
ote		Email: Be	njamin_Adams_	646f17a9@sfm.com	1					
We must interview this candidate.		Address: 12 76	24 Woodsey Ct, 092, United Stat	Southlake, Texas, es						
eview date	Category	EXAMS/CERTIFICATIO	N							
08/05/2020		USMLE ID: 53204244	15							
dd to Inton iow list		Steps		Date			Score			
Vas	V Saus	Step 1		06/07/2	014		245			
162	Jave	Step 2 (CK)		07/20/2	015		245			
#17046		Step 2 (CS)		07/08/2	015		Pass			
Kelly L Allen	Descent	Step 3		12/11/2	017		239			
Home / Applications 45 Cc Actions (2) - 3 CAS Upo	Incompleted S Incomplete	Search • Search a Categories ¢ Edit Cat	pplications	1 Great Candid	ate 2 Review L	ater 3 Not Sure	4 No 5 Good Ex	am Score	6 Ask Direc	۹ tor
Applicant	Last Residency		Assignee	Completed	First Delivery	Updated	Reviewed	C. egory	Note In	tervie
Crystal Adams , MD	New England Eye Center	, Tufts Medical School		×	07/17/2020		08/05/2020	0		Yes
Benjamin A Adams	University of Texas South	nwestern		×	07/06/2020		08/05/2020	1	Ē	Yes
Kelly L Allen	Duke University Ophthal	mology Residency Program	Jamie Cox	~	08/03/2020		08/05/2020			Yes
Zachary M Allen	University of Texas Soutl	nwestern Medical Center	Jamie Cox	~	07/16/2020		08/10/2020	1		Yes
Tara Allen , MD	George Washington Univ	versity	Jamie Cox	~	07/12/2020	07/13/2020	08/05/2020	1		Yes
Ashley Anderson , MD	University of Illinois at Cl	nicago		~	08/04/2020			1		
#32868	University of Southern C	alifornia. Roski Eve Institute		~	07/27/2020		08/10/2020	1		

# • SEARCH/FILTER

Click "Search" to view the list of filters available to search.

н	ome / Applications	65 Completed 🛛 🔁 5 Incomplete	Search - Search application	S						٩
1	Actions (0) 👻 🖒 CA	AS Updates C	Address	1 Great (	Candidate <b>2</b> Re	view Later  No	t Sure 🧧 No	5 Good Exam Se	core <mark>6</mark> Ask	Director
C	Applicant	Last Residency	Category Comlex Level1	Compl	eted First Deli	very Updated	Reviewed	d Categ	ory Not	e Intervie
	Crystal Adams , MD	New England Eye Center, Tu	t. Comlex Level2 CE	~	07/17/2	.020	08/05/2	.020 1		Yes
	#60043 Benjamin A Adams	University of Texas Southwe	Comiex Level3	~	07/06/2	.020	08/05/2	020 1	E	Yes
	#32996 Kelly L Allen	Duke University Ophthalmol	Country Degrees	~	08/03/2	2020	08/05/2	020		Yes
	#60324 Zachary M Allen	University of Texas Southwe	Email Employment	~	07/16/2	020	08/10/2	020 1		Yes
Но	me / Applications 🛛 🖌 6	5 Completed 🛛 🛱 5 Incomplete	Search  Search applications Degrees: PhD  AOA: I have be	een selected	×	Input fil s	ters and r earch	un s	ave search	<b>Q</b> Clear
-	Actions (0) 👻 🔊 CAS	Updates C	ategories 🌼 Edit Categories	1 Great C	andidate 2 Rev	view Later 3 Not	Sure 4 No	5 Good Exam Sco	ore 🚺 Ask D	Director
	Applicant	Last Residency		Completed	First Delivery	Updated	Reviewed	Category	Note	Interview
	#32868 Ryan M Anderson	University of Southern California, Rosl	i Eye Institute	~	07/27/2020		08/10/2020	1		
	#33367 Jordan R Cox , MD	Baylor College of Medicine		~	07/14/2020					

**Note:** Save search parameters by clicking "Save Search" button. Click "Saved Filters" button to find previously saved search queries.

# INTERVIEW LIST

This page is a shortened list of applicants that were marked "Yes" in the "Add to Interview List" column of the "Applications" page. This screen includes some of the same features as the "Applications" page (download applications, excel spreadsheets and send messages) and additional features (Download Interview Coversheet).

 Interview Coversheet – The interview coversheet includes a phot of the applicant (if available) and various academic information (e.g. medical school, exam score history).

**Note:** The coversheet can be downloaded with the entire application or as a single file. Click "Download Application" to select the sections of the application you want to download.

Program Menu	Home	/ Interview	List					
- Cummun	Actio	ons (1) 🔻						
Summary My Program	۰		ID	Applicant	Last Residency	Application	Completed	
Applications		🔊 'Iser	33628	Crystal Adams	New England Eye Center, Tufts Medical School	¥	0	Remove
🧓 Interview List			61915	Brittany Thompson		×	0	Remove
interview Scheduler		2	32996	Kelly L Allen	Duke University Ophthalmology Residency Program	*		Remove
<ul> <li>Rank List</li> <li>Program Directory</li> </ul>		2	60324	Zachary M Allen	University of Texas Southwestern Medical Center	£		Remove
Transactions		iser iser	60043	Benjamin A Adams	University of Texas Southwestern	×.		Remove
<b>1</b> Instructions		/ser	33265	Tara Allen	George Washington University	£	0	Remove
💼 Specialty 🗸 🗸		- and f						

AMS 🛨	#4045 Ophthal	U lowa - Retin mology Fellows	Select sections ×	
Interview	/ List		Select sections	
ıs (1) <del>-</del>			✓ Select all	
	ID	Applicant	✓ Interview Coversheet	Applicatio
) Iser	33628	Crystal Ad	Profile     Examinations	Ŧ
	61915	Brittany Tł	Education	±
) Ser	32996	Kelly L Alle	Personal statement     Employment	÷
/ Iser	60324	Zachary M	Additional Info	¥
) Iser	60043	Benjamin ,	Publications     Honors/Interests	Ŧ
) Iser	33265	Tara Allen	Documents	¥
			Close Preview Download	

sima	tch			
Residency and Fellow	vship Matching Services			
Main info				
	SF Match ID: 61919			
	Medical School: U Califo Medical School Country:	rnia San Francisco United States		
	Year of Graduation: 202	1		
	AOA: Not available at m	y institution		
	Sola Hamanism. Not ye	determined.		
Robert Thomps	son			
Robert Thomps	son			
Robert Thomps	son			
Robert Thomps Medical exam scores USMLE 1	SON USMLE 2 CK	USMLE 2 CS	USMLE 3	