

APPLICATION MANAGEMENT USER GUIDE

APPLICATIONS

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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.

Home / Applications 6 Completed 2 Incomplete Search Search applications

Actions (2) CAS Updates Categories **Edit Categories** 1 Great Candidate 2 Review Later 3 Not Sure 4 No 5 Good Exam Score 6 Ask Director

Applicant	Last Residency	Assignee	Completed	First Delivery	Updated	Reviewed	Category	Note	Interview
<input checked="" type="checkbox"/> #23367 Rebecca R Burton , MD	Baylor College of Medicine	Justin Young	✓	07/02/2020		08/01/2020	1		
<input type="checkbox"/> #29915 Andrew Cox	USC Roski Eye Institute		✗						
<input checked="" type="checkbox"/> #60254 Sara Y Curry , MD	Rutgers New Jersey Medical School	Justin Young	✓	07/06/2020		08/01/2020	1		
<input type="checkbox"/> #60041 Amber D Harris	SAUSHEC		✗						

Edit Categories

Update descriptions of field values

- 1 Great Candidate
- 2 Review Later
- 3 Not Sure
- 4 No
- 5 Good Exam Score
- 6 Ask Director

Close Save

ACTIONS BUTTON DESCRIPTIONS:

Program Menu

Home / Applications ✓ 65 Completed 🔄 5 Incomplete Search ▾ Search applications

Summary

My Program

Applications

Interview List

Interview Scheduler

Rank List

Program Directory

Transactions

Instructions

Actions (6) CAS Updates

- Add To Interview List
- Assign Program User to Applications
- Category
- Download Application
- Download Excel Report
- Send Message
- Review Date
- Zachary M Allen
- #33265 Tara Allen , MD

Categories ⚙ Edit Categories 1 Great Candidate 2 Review Later 3 Not Sure 4 No 5

Assignee	Completed	First Delivery	Updated	Reviewed
England Eye Center, Tufts Medical School	✓	07/17/2020		
University of Texas Southwestern	✓	07/06/2020		
University Ophthalmology Residency Program	Jamie Cox ✓	08/03/2020		
University of Texas Southwestern Medical Center	Jamie Cox ✓	07/16/2020		
George 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.

Home / Applications ✓ 65 Completed 🔄 5 Incomplete Search ▾ Search applications

Actions (5) CAS Updates

Categories ⚙ Edit Categories 1 Great Candidate 2 Review Later 3 Not Sure 4 No 5

Applicant

- #33628 Crystal Adams , MD 1
- #60043 Benjamin A Adams
- #32996 Kelly L Allen 1
- #60324 Zachary M Allen
- #33265 Tara Allen , MD 2
- #32991 Ashley Anderson , MD 1
- #32868 Ryan M Anderson
- #33094 Shannon P Anderson , MD 2
- #18382 Angela A Brown , MD 2
- #60904 Donna Brown 1

Interview List

Change the Interview list status for **5** applicant(s).

Add to Interview list

Select... ▾

- No
- Yes**
- Not defined

Assignee	Completed	First Delivery	Updated	Reviewed
University of Southern California, Keck Eye Institute	✓	07/27/2020		
University of Puerto Rico	✓	07/06/2020	08/05/2020	
KY - U Louisville (3345) (Ophthalmology)	✓	07/21/2020	07/23/2020	
Louisiana State University Health Science Center	✓	07/27/2020		

The “Interview” column will be updated with the status change.

Home / Applications ✓ 65 Completed 🔄 5 Incomplete Search

Actions (0) CAS Updates Categories [Edit Categories](#) 1 Great Candidate 2 Review Later 3 Not Sure 4 No 5 Good Exam Score 6 Ask Director

<input type="checkbox"/> Applicant	Last Residency	Completed	First Delivery	Updated	Reviewed	Category	Note	Interview
<input type="checkbox"/> #33628 Crystal Adams , MD	New England Eye Center, Tufts Medical School	✓	07/17/2020					Yes
<input type="checkbox"/> #60043 Benjamin A Adams	University of Texas Southwestern	✓	07/06/2020					Yes
<input type="checkbox"/> #32996 Kelly L Allen	Duke University Ophthalmology Residency Program	✓	08/03/2020					Yes
<input type="checkbox"/> #60324 Zachary M Allen	University of Texas Southwestern Medical Center	✓	07/16/2020					Yes
<input type="checkbox"/> #33265 Tara Allen , MD	George Washington University	✓	07/12/2020	07/13/2020				Yes
<input type="checkbox"/> #32991 Ashley Anderson , MD 1	University of Illinois at Chicago	✓	08/04/2020					
<input type="checkbox"/> #33868 Ryan M Anderson	University of Southern California, Roski Eye Institute	✓	07/27/2020					



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 Iowa - Retina
Ophthalmology Fellowship - Retina 📧 👤 Jamie Cox Impersonated Log Out

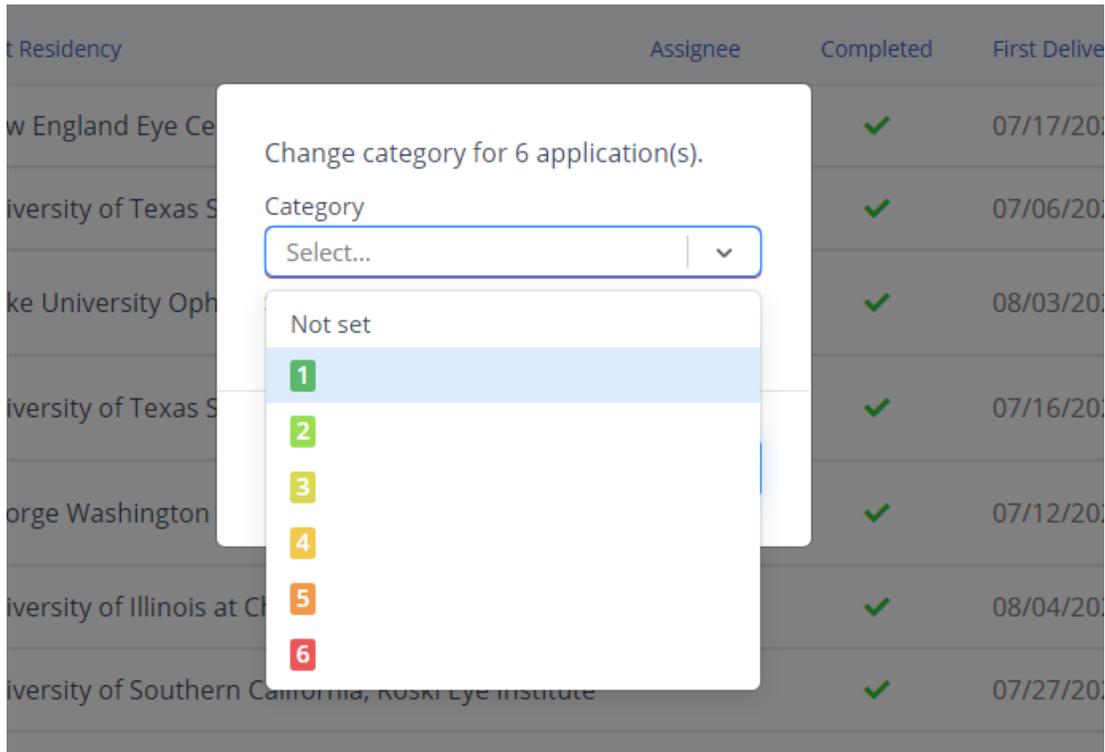
Home / Applications ✓ 65 Completed 🔄 5 Incomplete Search

Actions (0) CAS Updates Categories [Edit Categories](#) 1 Great Candidate 2 Review Later 3 Not Sure 4 No 5 Good Exam Score 6 Ask Director

<input type="checkbox"/> Applicant	Last Residency	Assignee	Completed	First Delivery	Updated	Reviewed	Category	Note	Interview
<input type="checkbox"/> #33628 Crystal Adams , MD	New England Eye Center, Tufts Medical School		✓	07/17/2020					Yes
<input type="checkbox"/> #60043 Benjamin A Adams	University of Texas Southwestern		✓	07/06/2020					Yes
<input type="checkbox"/> #32996 Kelly L Allen	Duke University Ophthalmology Residency Program	Jamie Cox	✓	08/03/2020					Yes
<input type="checkbox"/> #60324 Zachary M Allen	University of Texas Southwestern Medical Center	Jamie Cox	✓	07/16/2020					Yes
<input type="checkbox"/> #33265 Tara Allen , MD	George Washington University	Jamie Cox	✓	07/12/2020	07/13/2020				Yes
<input type="checkbox"/> #32991 Ashley Anderson , MD 1	University of Illinois at Chicago		✓	08/04/2020					
<input type="checkbox"/> #33868 Ryan M Anderson	University of Southern California, Roski Eye Institute		✓	07/27/2020					




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



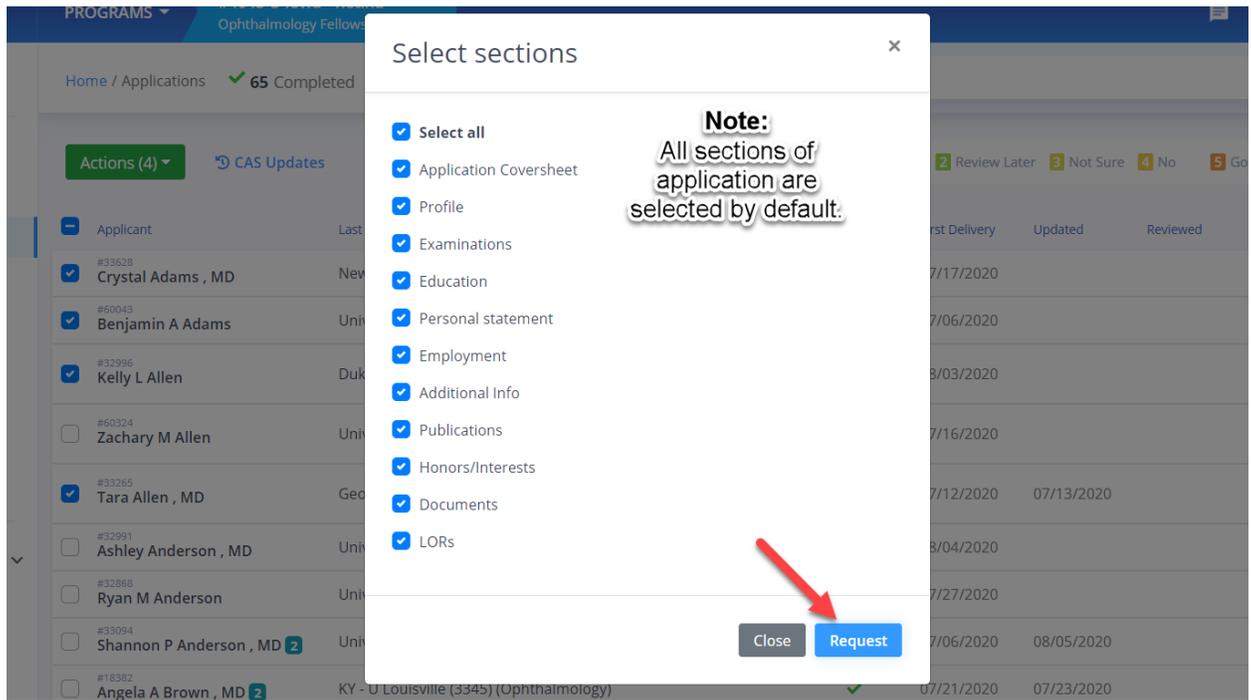
Home / Applications 65 Completed 5 Incomplete Search

Actions (6) CAS Updates Categories [Edit Categories](#) 1 Great Candidate 2 Review Later 3 Not Sure 4 No 5 Good Exam Score 6 Ask Director

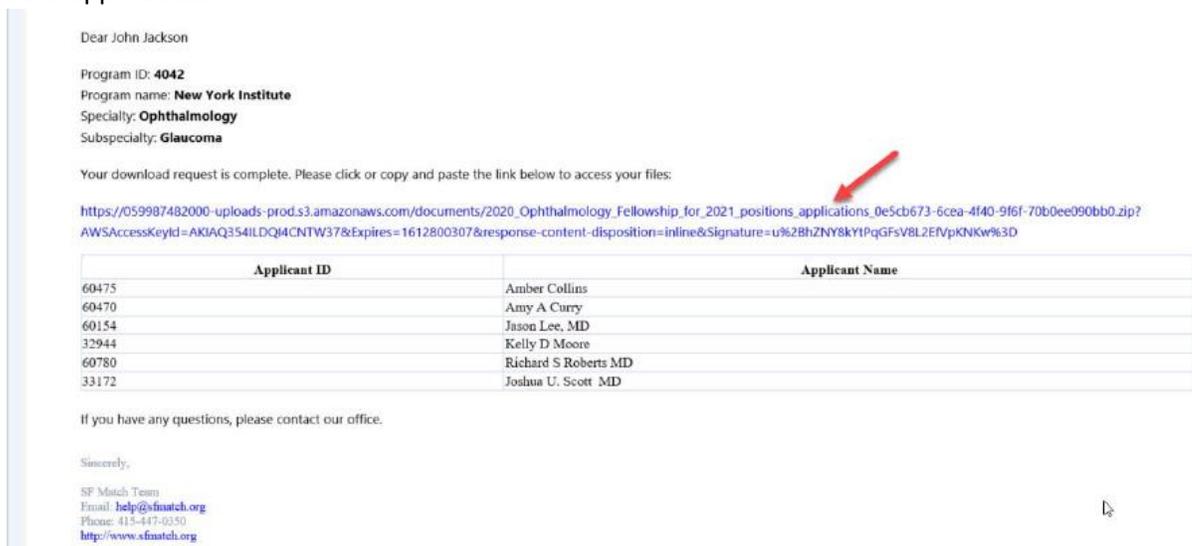
Applicant	Last Residency	Assignee	Completed	First Delivery	Updated	Reviewed	Category	Note	Interview
<input checked="" type="checkbox"/> #33628 Crystal Adams , MD	New England Eye Center, Tufts Medical School		✓	07/17/2020			1		Yes
<input checked="" type="checkbox"/> #60043 Benjamin A Adams	University of Texas Southwestern		✓	07/06/2020			1		Yes
<input type="checkbox"/> #32996 Kelly L Allen	Duke University Ophthalmology Residency Program	Jamie Cox	✓	08/03/2020					Yes
<input checked="" type="checkbox"/> #60324 Zachary M Allen	University of Texas Southwestern Medical Center	Jamie Cox	✓	07/16/2020			1		Yes
<input checked="" type="checkbox"/> #32365 Tara Allen , MD	George Washington University	Jamie Cox	✓	07/12/2020	07/13/2020		1		Yes
<input checked="" type="checkbox"/> #32991 Ashley Anderson , MD	University of Illinois at Chicago		✓	08/04/2020			1		
<input checked="" type="checkbox"/> #32868 Ryan M Anderson	University of Southern California, Roski Eye Institute		✓	07/27/2020			1		
<input type="checkbox"/> #33094 Shannon P Anderson , MD	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”.



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



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

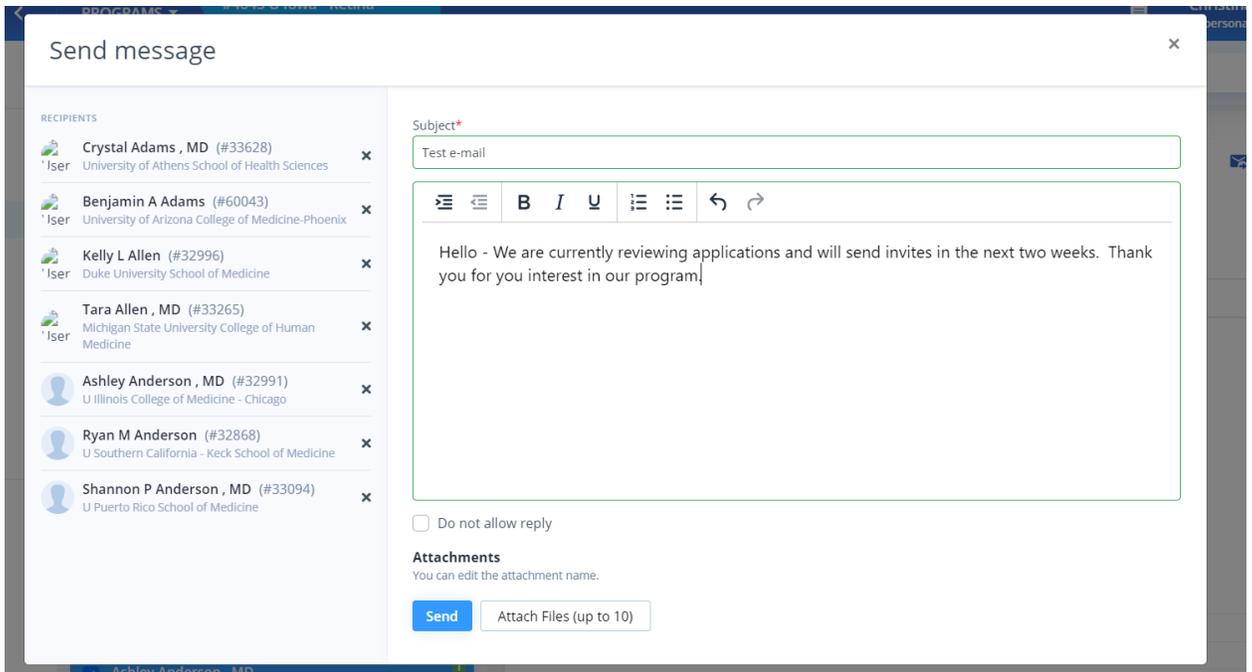
The screenshot shows a web application interface. On the left, there is a list of applicants under the heading 'University of Texas Southwestern'. The list includes Kelly L. Allen, Zachary M. Allen, Tara Allen, MD, and Ashley Anderson, MD. Ashley Anderson, MD is selected and highlighted in blue. On the right, the detailed view for Ashley Anderson #32991 is shown. The view includes a search bar, a 'Download' button (highlighted with a red arrow), and a 'Send Email' button. Below these are tabs for 'GENERAL', 'ADDITIONAL INFO (CAS)', 'DOCUMENTS', and 'PERSONAL STATEMENT'. The 'GENERAL' tab is active, showing fields for 'Assigned to' (Not assigned), 'Applicant', 'Exams/Certification', 'Education', 'Employment', 'Publications', and 'H & I'. The 'APPLICANT INFO' section includes fields for ID, Cell phone, Email, Address, Home phone, and Pager. The 'EXAMS/CERTIFICATION' section includes a table with columns for Steps, Date, and Score.

- **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.



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

Applicant	Last Residency	Assignee	Completed	First Delivery	Updated	Reviewed	Category	Note	Interview
<input type="checkbox"/> #33628 Crystal Adams , MD	New England Eye Center, Tufts Medical School		✓	07/17/2020		08/05/2020	1		Yes
<input type="checkbox"/> #60043 Benjamin A Adams	University of Texas Southwestern		✓	07/06/2020		08/05/2020	1		Yes
<input type="checkbox"/> #32996 Kelly L Allen	Duke University Ophthalmology Residency Program	Jamie Cox	✓	08/03/2020		08/05/2020			Yes
<input checked="" type="checkbox"/> #60324 Zachary M Allen	University of Texas Southwestern Medical Center	Jamie Cox	✓	07/16/2020		08/10/2020	1		Yes
<input type="checkbox"/> #33265 Tara Allen , MD	George Washington University	Jamie Cox	✓	07/12/2020	07/13/2020	08/05/2020	1		Yes
<input type="checkbox"/> #32991 Ashley Anderson , MD	University of Illinois at Chicago		✓	08/04/2020			1		
<input checked="" type="checkbox"/> #32868 Ryan M Anderson	University of Southern California, Roski Eye Institute		✓	07/27/2020		08/10/2020	1		
<input type="checkbox"/> #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.

The image shows two screenshots of a web application interface. The top screenshot displays the profile page for Benjamin Adams #60043. On the left, a sidebar shows a list of applicants with Benjamin Adams selected. A red arrow points to the 'Note' field where the text 'We must interview this candidate' is entered. The 'Save' button is visible at the bottom of the note field. The main content area shows the applicant's details, including ID, cell phone, email, and address, as well as a table of exam steps and scores.

The bottom screenshot shows a list of applicants. A red arrow points to the 'Notes entered' icon (a green square with a white '1') next to Benjamin Adams. The table below lists the following applicants:

Applicant	Last Residency	Assignee	Completed	First Delivery	Updated	Reviewed	Category	Note	Interview
<input type="checkbox"/> Crystal Adams, MD	New England Eye Center, Tufts Medical School		✓	07/17/2020		08/05/2020	1		Yes
<input type="checkbox"/> Benjamin A Adams	University of Texas Southwestern		✓	07/06/2020		08/05/2020	1	Notes entered	Yes
<input type="checkbox"/> Kelly L Allen	Duke University Ophthalmology Residency Program	Jamie Cox	✓	08/03/2020		08/05/2020			Yes
<input checked="" type="checkbox"/> Zachary M Allen	University of Texas Southwestern Medical Center	Jamie Cox	✓	07/16/2020		08/10/2020	1		Yes
<input type="checkbox"/> Tara Allen, MD	George Washington University	Jamie Cox	✓	07/12/2020	07/13/2020	08/05/2020	1		Yes
<input type="checkbox"/> Ashley Anderson, MD	University of Illinois at Chicago		✓	08/04/2020			1		
<input checked="" type="checkbox"/> Ryan M Anderson	University of Southern California, Roski Eye Institute		✓	07/27/2020		08/10/2020	1		

- **SEARCH/FILTER**

Click “Search” to view the list of filters available to search.

The screenshot displays a search interface with the following components:

- Search Dropdown:** A menu listing filters such as Address, AOA, Category, Comlex Level1, Comlex Level2 CE, Comlex Level2 PE, Comlex Level3, Country, Degrees, Email, and Employment. A red arrow points to the 'AOA' option.
- Search Bar:** Contains the text 'Search applications' and a search icon. A red arrow points to the search icon.
- Filters:** Two active filters are shown: 'Degrees: PhD' and 'AOA: I have been selected'. A red arrow points to the search bar area with the text 'Input filters and run search'.
- Search Results Table:**

Completed	First Delivery	Updated	Reviewed	Category	Note	Interview
✓	07/17/2020		08/05/2020	1		Yes
✓	07/06/2020		08/05/2020	1		Yes
✓	08/03/2020		08/05/2020			Yes
✓	07/16/2020		08/10/2020	1		Yes

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

- Summary
- My Program
- Applications
- Interview List**
- Interview Scheduler
- Rank List
- Program Directory
- Transactions
- Instructions
- Specialty

Home / Interview List

Actions (1) ▾

	ID	Applicant	Last Residency	Application	Completed	
<input type="checkbox"/>	33628	Crystal Adams	New England Eye Center, Tufts Medical School		<input type="checkbox"/>	Remove
<input checked="" type="checkbox"/>	61915	Brittany Thompson			<input type="checkbox"/>	Remove
<input type="checkbox"/>	32996	Kelly L Allen	Duke University Ophthalmology Residency Program		<input type="checkbox"/>	Remove
<input type="checkbox"/>	60324	Zachary M Allen	University of Texas Southwestern Medical Center		<input type="checkbox"/>	Remove
<input type="checkbox"/>	60043	Benjamin A Adams	University of Texas Southwestern		<input type="checkbox"/>	Remove
<input type="checkbox"/>	33265	Tara Allen	George Washington University		<input type="checkbox"/>	Remove

AMS #4045 U Iowa - Retina Ophthalmology Fellow

Interview List

1 (1)

ID	Applicant
33628	Crystal Ad
61915	Brittany T
32996	Kelly L Alle
60324	Zachary M
60043	Benjamin
33265	Tara Allen

Select sections

- Select all
- Interview Coversheet
- Profile
- Examinations
- Education
- Personal statement
- Employment
- Additional Info
- Publications
- Honors/Interests
- Documents
- LORs

Close Preview Download



Interview Coversheet

Residency and Fellowship Matching Services

Main info



SF Match ID: **61919**

Medical School: **U California San Francisco**

Medical School Country: **United States**

Year of Graduation: **2021**

AOA: **Not available at my institution**

Gold Humanism: **Not yet determined.**

Robert Thompson

Medical exam scores

USMLE 1	USMLE 2 CK	USMLE 2 CS	USMLE 3
232	226	Unknown	0

LETTERS OF REFERENCE