

USER DATA DOWNLOAD INSTRUCTIONS

Each trainee is required to have a complete E*Value profile. An E*Value profile is complete once the following E*Value fields have been entered: [Click to view required fields](#)

Given the volume of entries coordinators have to input, it is easy to miss one or two fields or enter information and then not save it. To ensure all of your trainees have complete E*Value profiles, you should run a User Data Download Report. This will list all of your trainees and show you what, if anything, is missing.

To run a User Data Download Report:

1) In your home program, select “User Data Download” from the Administration > Users toolbar.

The screenshot shows the E*Value web application interface. The left sidebar menu is expanded, and 'User Data Download' is highlighted under the 'Administration' section. The main content area displays the 'Biographic Data' form. The form includes the following fields and sections:

- Filter Section:** Includes 'Fill list from...', 'Return inactive Users...', 'Last names starting with...', and 'Any name containing...' with corresponding filters and buttons like 'View/Edit User' and 'Add New User'.
- Biographic Information:** A section containing various personal and professional details.
 - Legal First Name, Legal Middle Name, Legal Last Name:** Text input fields.
 - Preferred First Name, Preferred Last Name:** Text input fields.
 - Title, MI, Credentials:** Text input fields.
 - Logins, Password, User ID, External ID:** Text input fields.
 - SSH Prefix, SSN, Race:** Text input fields.
 - Birthdate, Birth Place, Citizenship Country:** Text input fields.
 - Visa Status, Visa Type, Visa Exp Date:** Text input fields.
 - Picture File Name, E-Mail Address:** Text input fields.
 - Notes:** A large text area for additional information.
 - Status, Current Rank:** Dropdown menus.
 - Last Update Date, Last Updated By:** Text input fields.
 - Gender, Inbound Rotator:** Radio buttons and text input fields.

2) Select the E*Value required fields. Use the +/- button to expand the options.

The screenshot shows the E*Value User Data Download page. The left sidebar contains navigation links: HOME, USER MENU, ADMINISTRATION, Users, Biographic Data, Custom Fields, At-A-Glance, Advisors, Directors, Promote, People Groups, Assign Users to Groups, Security View, Mailing Labels, User Data Download (highlighted), Activities, Time Frames, Schedules, Reminders, Post Office, Program Setup, Conferences, Review / Release, Questions, Pdx, Evaluations, Duty Hours, Help, Home, REPORTS, E*VALUE EXTRAS, and LOG OUT. The main content area is titled "User Data Download" and includes sections for "Users", "User Biographic Fields", "Program Information", "User Custom Fields", "Training History", and "Scores". The "Users" section has checkboxes for "LAST NAME (PREFERRED)", "RANK", "SPECIALTIES", "FIRST NAME (PREFERRED)", "ROLES", and "GROUPS". The "User Biographic Fields" section has a "+/-" button next to it. The "Program Information" section has a "+/-" button. The "User Custom Fields" section has a "+/-" button. The "Training History" section has a "+/-" button. The "Scores" section has a "+/-" button. The "User Field Display Order" section has a "Move Up" button and a "Move Down" button. The "Filter Results Based On:" section has a "Generate Report" button, a "Save Template Parameters" button, and a "Delete Selected Template" button. The "Saved Templates:" section shows "No saved templates are available".

The screenshot shows the E*Value User Data Download page with the "User Biographic Fields" section expanded. The expanded list includes: "Check All", "AAMC NUMBER", "ACLS CERTIFICATION DATE", "ACLS NUMBER", "BIRTH COUNTRY", "BIRTH DATE", "CELL PHONE NUMBER", "CITIZENSHIP COUNTRY", "CREDENTIALS", "DEA CERTIFICATION DATE", "DEA REGISTRATION NUMBER", "DEPARTMENT ID 1", "DEPARTMENT ID 2", "ECFMG CERT DATE", "ECFMG NUMBER", "ECFMG VALID THROUGH DATE", "EGME SIGNOFF DATE", "EMAIL", "EMAIL REMINDER DATE", "EMERGENCY CONTACT ADDRESS 1", "EMERGENCY CONTACT ADDRESS 2", "EMERGENCY CONTACT CITY", "EMERGENCY CONTACT EMAIL", "EMERGENCY CONTACT NAME", "EMERGENCY CONTACT PHONE", "EMERGENCY CONTACT RELATIONSHIP", "EMERGENCY CONTACT STATE", "EMERGENCY CONTACT ZIP", and "EMPLOYEE ID". The "Users" section has checkboxes for "LAST NAME (PREFERRED)", "RANK", "SPECIALTIES", "FIRST NAME (PREFERRED)", "ROLES", and "GROUPS". The "User Biographic Fields" section has checkboxes for "LEGAL FIRST NAME", "LEGAL LAST NAME", "LEGAL MIDDLE NAME", "LICENSE EXPIRATION DATE", "LICENSE NUMBER", "LOGIN NAME", "MAIL STOP", "MEDICAL SCHOOL CODE", "MEDICAL SCHOOL GRAD DATE", "MEDICAL SCHOOL NAME", "MESSAGING ADDRESS", "NPI", "OFFICE ADDRESS 1", "OFFICE ADDRESS 2", "OFFICE CITY", "OFFICE COUNTRY", "OFFICE ORGANIZATION NAME", "OFFICE ORGANIZATION WEB PAGE", "OFFICE STATE", "OFFICE ZIP 4", "OFFICE ZIP 5", "PAGER NUMBER", "PALS CERTIFICATION DATE", "PALS NUMBER", "PERMANENT MAILING ADDRESS 1", "PERMANENT MAILING ADDRESS 2", "PERMANENT MAILING CITY", and "PERMANENT MAILING COUNTRY". The "Filter Results Based On:" section has a "Generate Report" button, a "Save Template Parameters" button, and a "Delete Selected Template" button. The "Saved Templates:" section shows "No saved templates are available".

3) In the User Custom Fields section, be sure to select Race/ Ethnicity and Date UCSF-GME Training Commenced. DO NOT check the Employee ID or Permanent Email boxes in this section. Instead, use the Employee ID and Email check boxes in the Biographic Fields section (circled above).

The screenshot displays the E*Value web application interface. The top navigation bar includes the E*Value logo, the UCSF Department of Medicine Evaluation System name, and the UCSF Internal Medicine, Residency, ACGME (New) logo. The sidebar on the left contains navigation links for HOME, USER MENU, ADMINISTRATION, Users, Biographic Data, Custom Fields, At-A-Glance, Advisors, Directors, Promote, People Groups, Assign Users to Groups, Security View, Mailing Labels, User Data Download (highlighted), Activities, Time Frames, Schedules, Reminders, Post Office, Program Setup, Conferences, Review / Release, Questions, Pdx, Evaluations, Duty Hours, Help, and Home. The main content area is titled "User Data Download" and contains several sections: "Users" with checkboxes for LAST NAME (PREFERRED), RANK, SPECIALTIES, FIRST NAME (PREFERRED), ROLES, and GROUPS; "User Biographic Fields +/-", "Program Information +/-", and "User Custom Fields +/-" (circled in red); a note about sorting based on custom fields; "Training History +/-"; "Scores +/-"; "User Field Display Order" with a list of fields (LAST NAME (PREFERRED), FIRST NAME (PREFERRED), RANK) and "Move Up" / "Move Down" buttons; and "Filter Results Based On:" with dropdowns for Saved Templates, Users, Rank, Role, and Status, along with buttons for Generate Report, Save Template Parameters, and Delete Selected Template. Red arrows point to the "User Custom Fields +/-" section and the "Race/ Ethnicity" and "Date UCSF-GME Training Commenced" checkboxes. The bottom status bar shows the Mozilla Firefox browser, the start button, and the system clock.

4) Once you have selected the required E*Value fields, you will need to filter your results.

Users: All Users

Groups: All Groups

Rank: Select all of the PGY ranks. To select more than one rank, hold the CTRL key and click.

Role: Select the Trainee Role

Status: You can only select one status. Select Active to see your current trainees or Pre/Post active to see your incoming trainees.

Be sure to also select Export As: Excel Spreadsheet.

The screenshot shows the E*Value User Data Download interface. The browser is Mozilla Firefox. The page title is "User Data Download". The UCSF logo and "University of California San Francisco Department of Medicine Evaluation System" are at the top. The sidebar on the left contains links: HOME, USER MENU, ADMINISTRATION, and REPORTS. The main content area has a "Filter Results Based On:" section with several dropdown menus. The "Export As" dropdown is set to "Excel Spreadsheet". The "Users" dropdown is set to "All Users". The "Groups" dropdown is set to "All Groups". The "Rank" dropdown is set to "All Ranks". The "Role" dropdown is set to "Trainee". The "Status" dropdown is set to "Active". Red arrows point to the "Users", "Rank", "Role", and "Status" dropdowns. The "Export As" dropdown is also circled in red. The interface includes buttons for "Generate Report", "Save Template Parameters", and "Delete Selected Template".

5) Before you generate your report, you may want to select Save Template Parameters so you can easily load the report's settings in the future. After you save the template, you can access the report from the Saved Templates drop down menu.

The screenshot shows the E*Value web application interface. The top navigation bar includes the E*Value logo, UCSF Department of Medicine Evaluation System, and UCSF Internal Medicine, Residency, ACGME (New). The left sidebar contains navigation links for HOME, USER MENU, ADMINISTRATION, Users, Biographic Data, Custom Fields, At-A-Glance, Advisors, Directors, Promote, People Groups, Assign Users to Groups, Security View, Mailing Labels, User Data Download (highlighted), Activities, Time Frames, Schedules, Reminders, Post Office, Program Setup, Conferences, Review / Release, Questions, Pdx, Evaluations, Duty Hours, Help, and Home. The main content area is titled 'User Data Download' and includes sections for Users, User Biographic Fields, Program Information, User Custom Fields, Training History, Scores, and Filter Results Based On. The 'Filter Results Based On' section includes a 'Saved Templates' dropdown menu, a 'Generate Report' button, and a 'Save Template Parameters' button (circled in red). A red arrow points to the 'Save Template Parameters' button. The bottom status bar shows the Mozilla Firefox browser, the start button, and the system clock.

6) Click Generate Report and save the report to your hard drive. Once you open the file, you will be able to see if any of your trainees have missing E*Value information. You will need to run the report for each of your home programs.