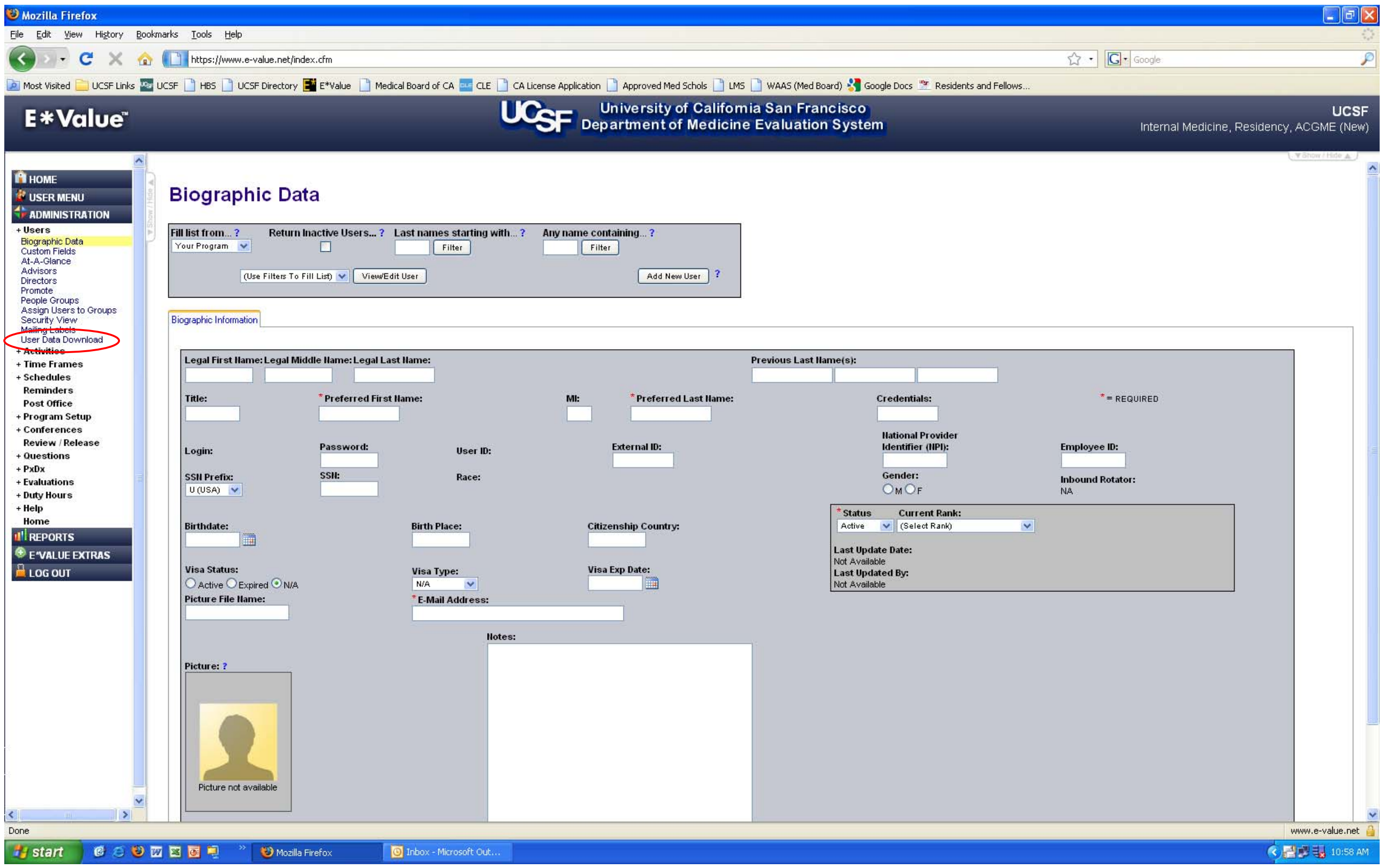
USER DATA DOWNLOAD INSTRUCTIONS

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]

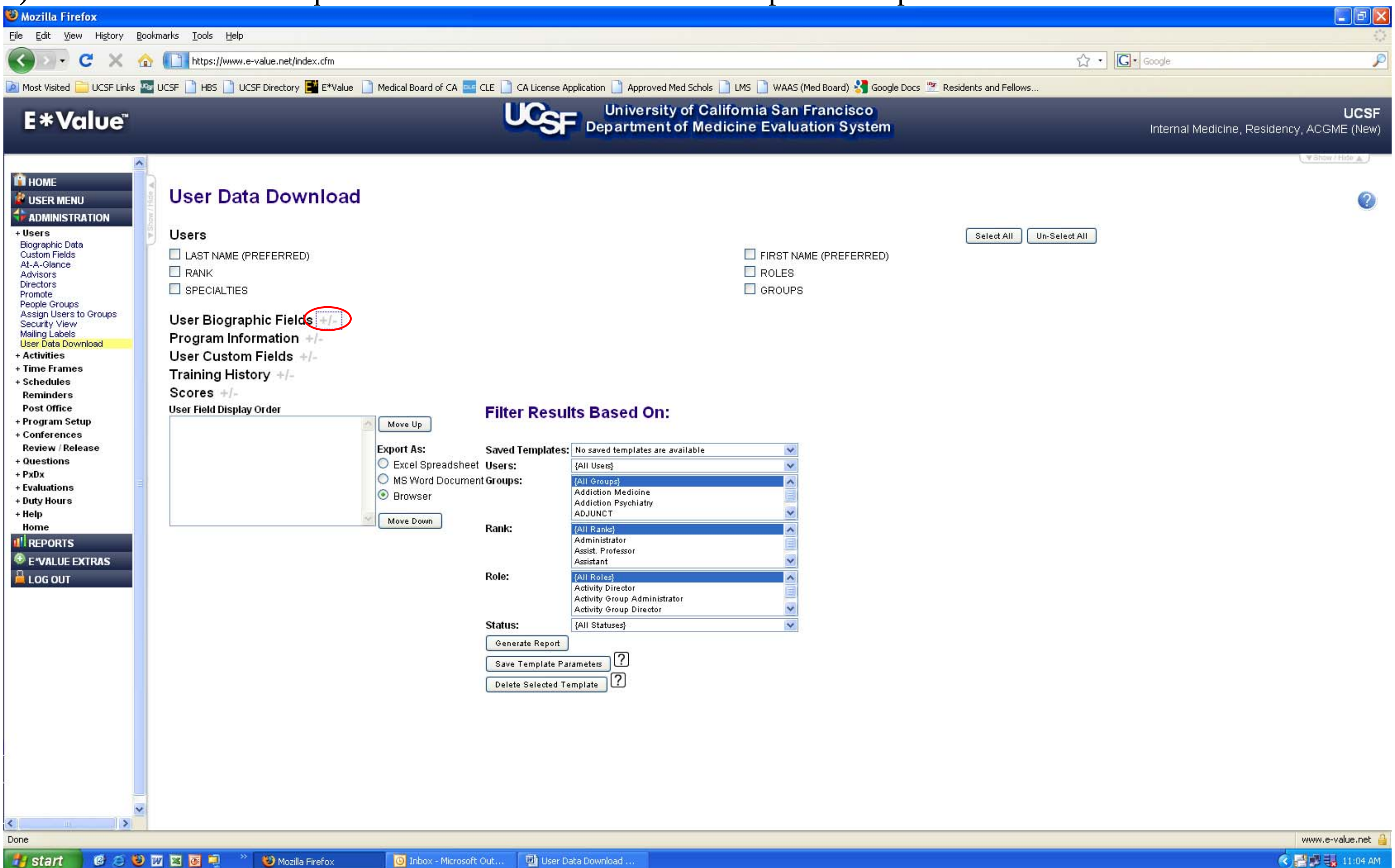
Given the volume of entries coordinators have to input, it is easy to miss one or two fields or enter information and then not save it. To ensure all of your trainees have complete E*Value profiles, you should run a User Data Download Report. This will list all of your trainees and show you what, if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

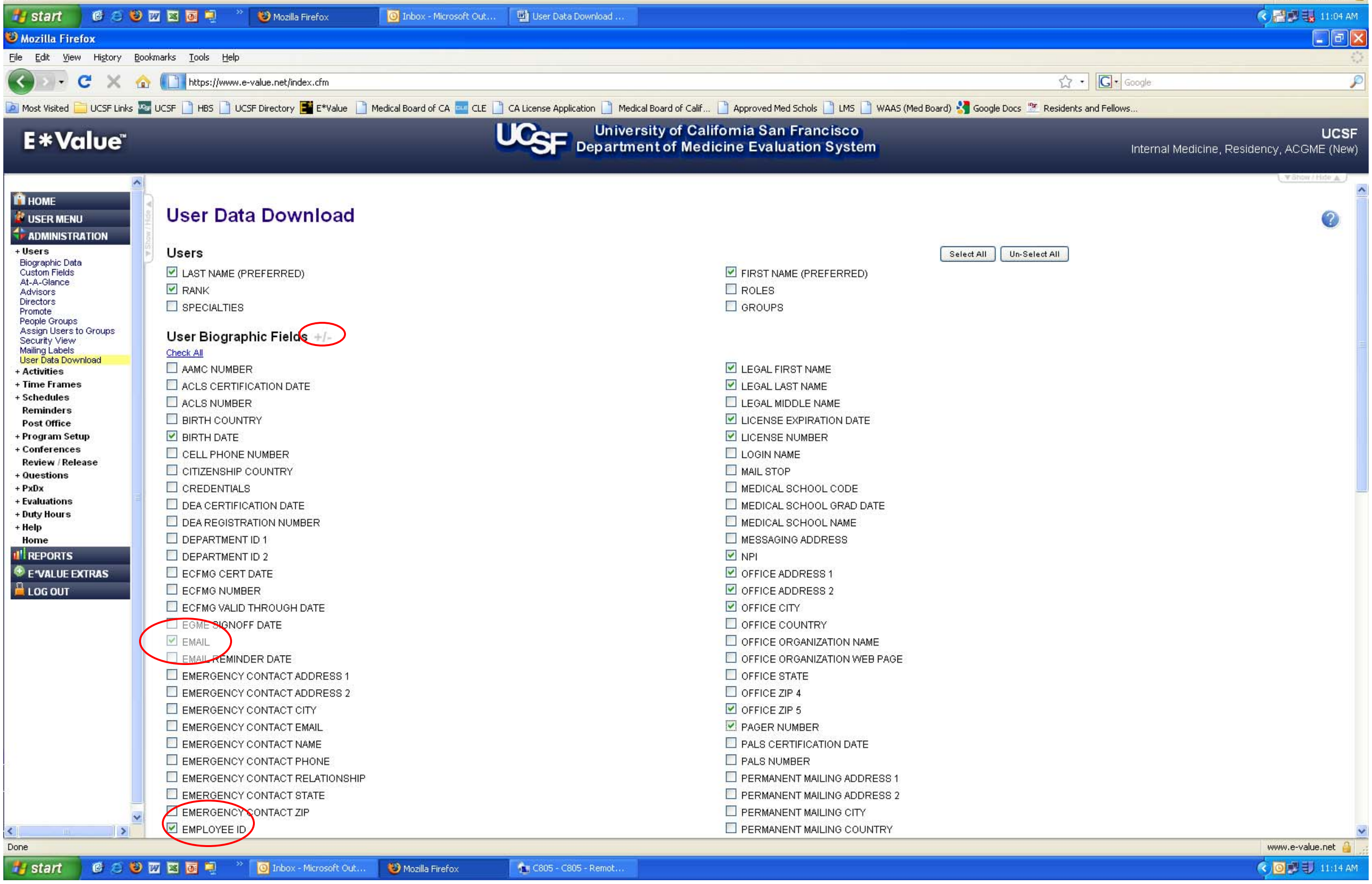
To run a User Data Download Report:

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

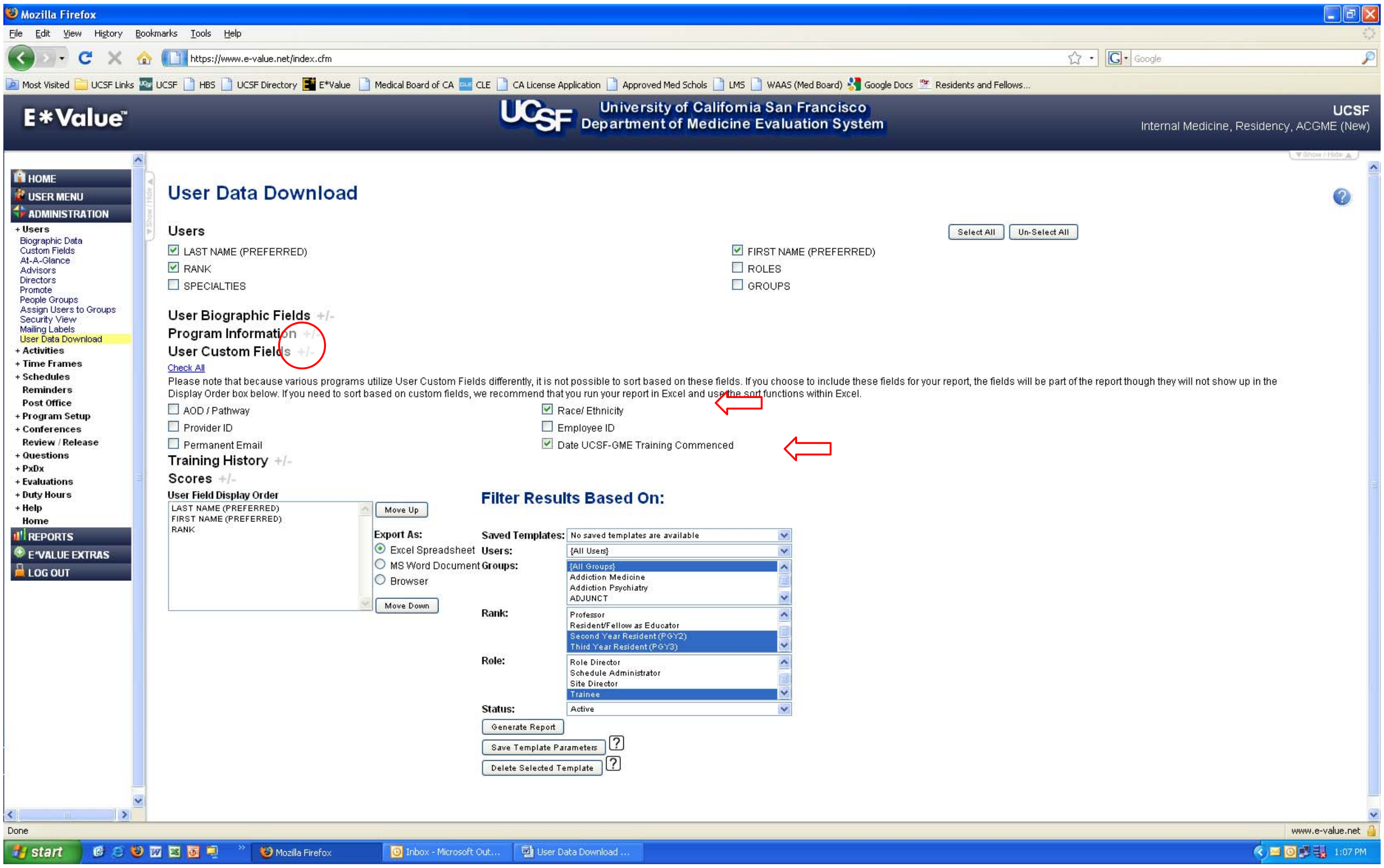


2) Select the E*Value required fields. Use the +/- button to expand the options.





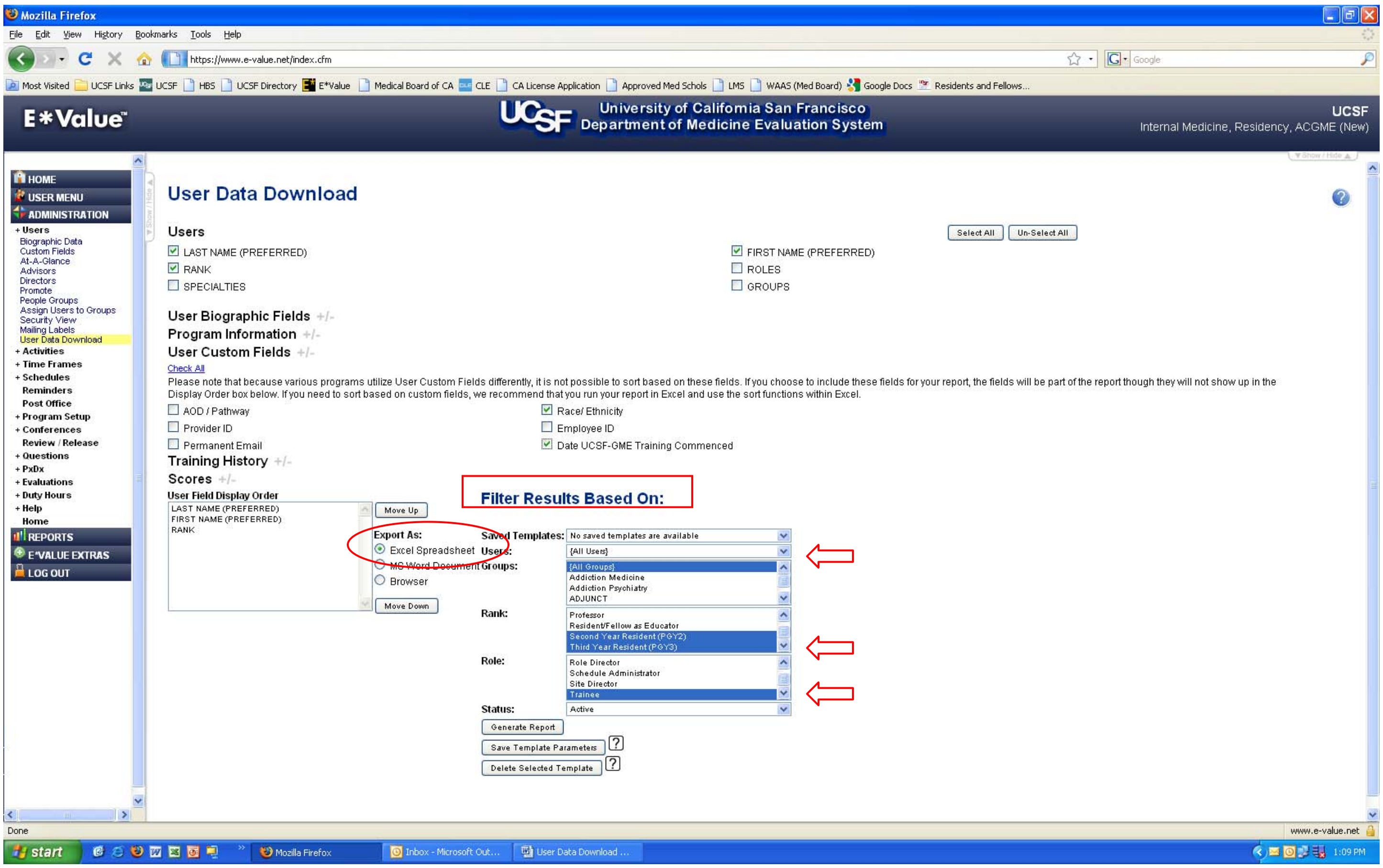
3) In the User Custom Fields section, be sure to select Race/ Ethnicity and Date UCSF-GME Training Commenced. DO NOT check the Employee ID or Permanent Email boxes in this section. Instead, use the Employee ID and Email check boxes in the Biographic Fields section (circled above).



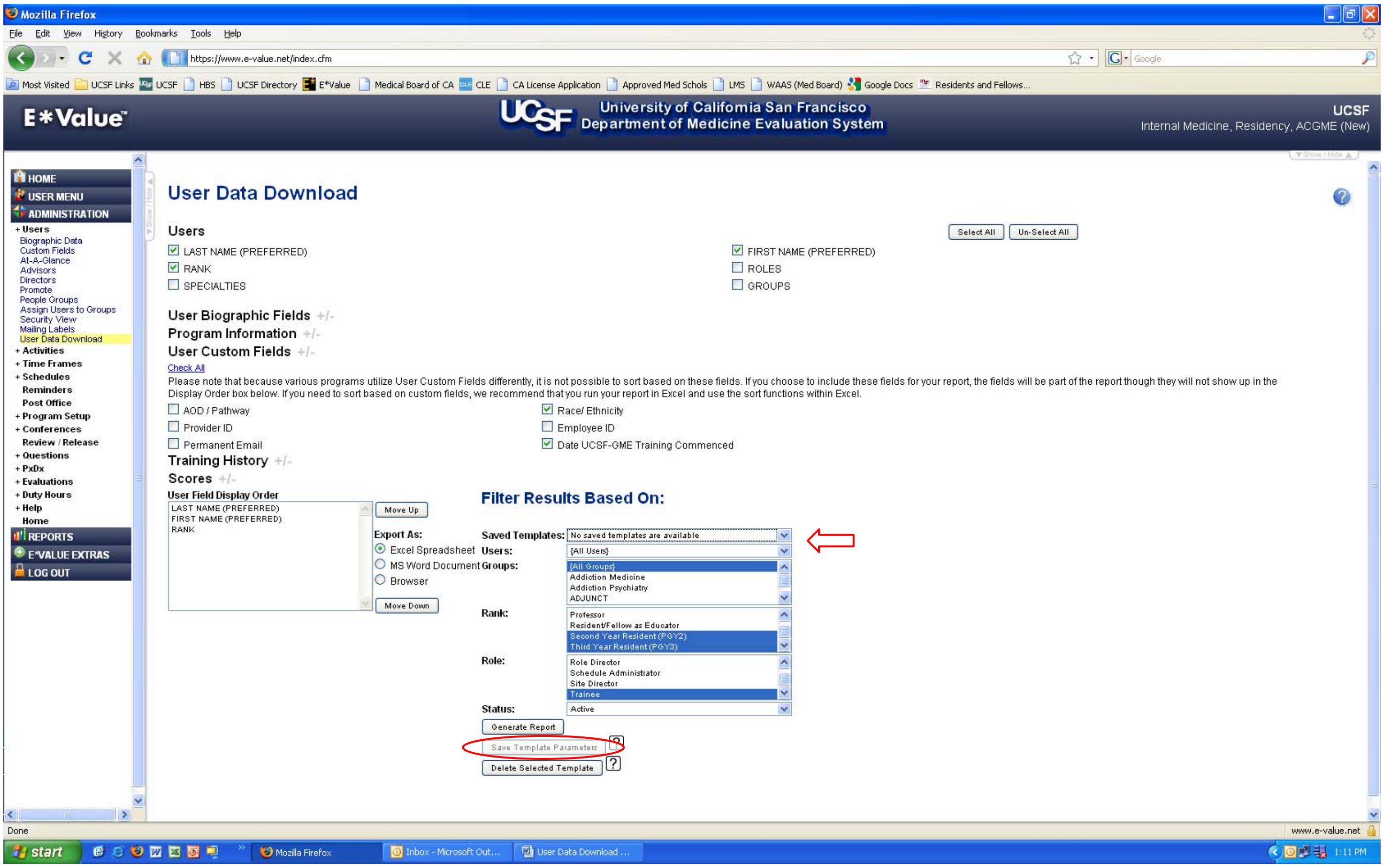
4) Once you have selected the required E*Value fields, you will need to filter your results.

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.



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.



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.