

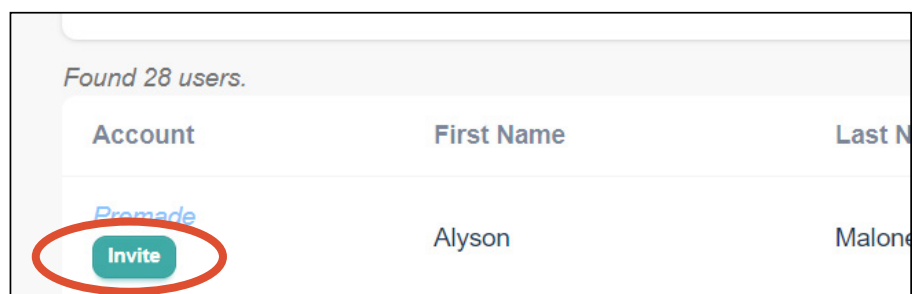
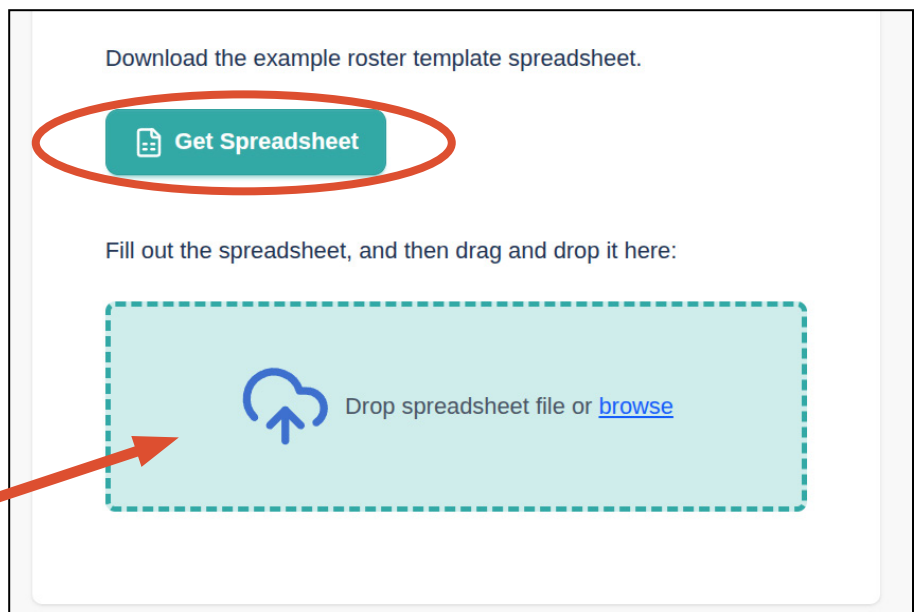
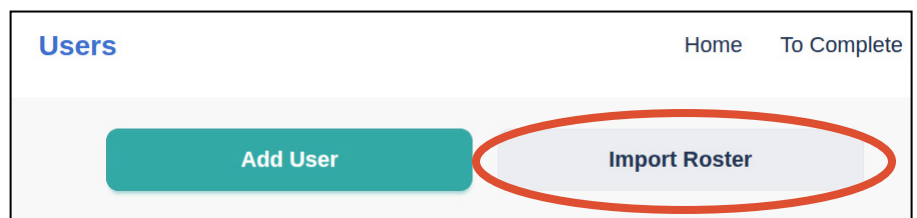


This guide walks account administrators through the steps required to perform a batch upload of user information in the ABS EPA App™, powered by Firefly. **This process must be completed on the desktop version of the app; batch upload is not available on the mobile version.**

Additional information is provided in the event that administrators wish to export user information from the MedHub or New Innovations platforms to use during the batch upload process.

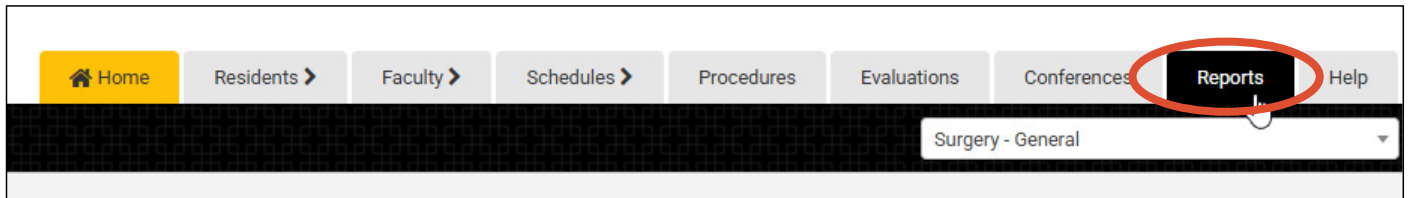
ABS EPA App™ Batch Upload

1. Launch the desktop version of the [ABS EPA App™](#).
2. Navigate to the [Users](#) page.
3. Click the “Import Roster” button.
4. Click the “Get Spreadsheet” button on the *Import Users* page to download the roster template, or access [here](#).
5. Enter the information in the appropriate columns of all users in your program and save the file.
6. Drag and drop the file for your completed spreadsheet into the green area to import it, or click “Browse” to upload the file from your computer.
7. When you return to the *Users* page, your new users will now be listed.
8. Click the “Invite” button to invite each new user to activate their account.

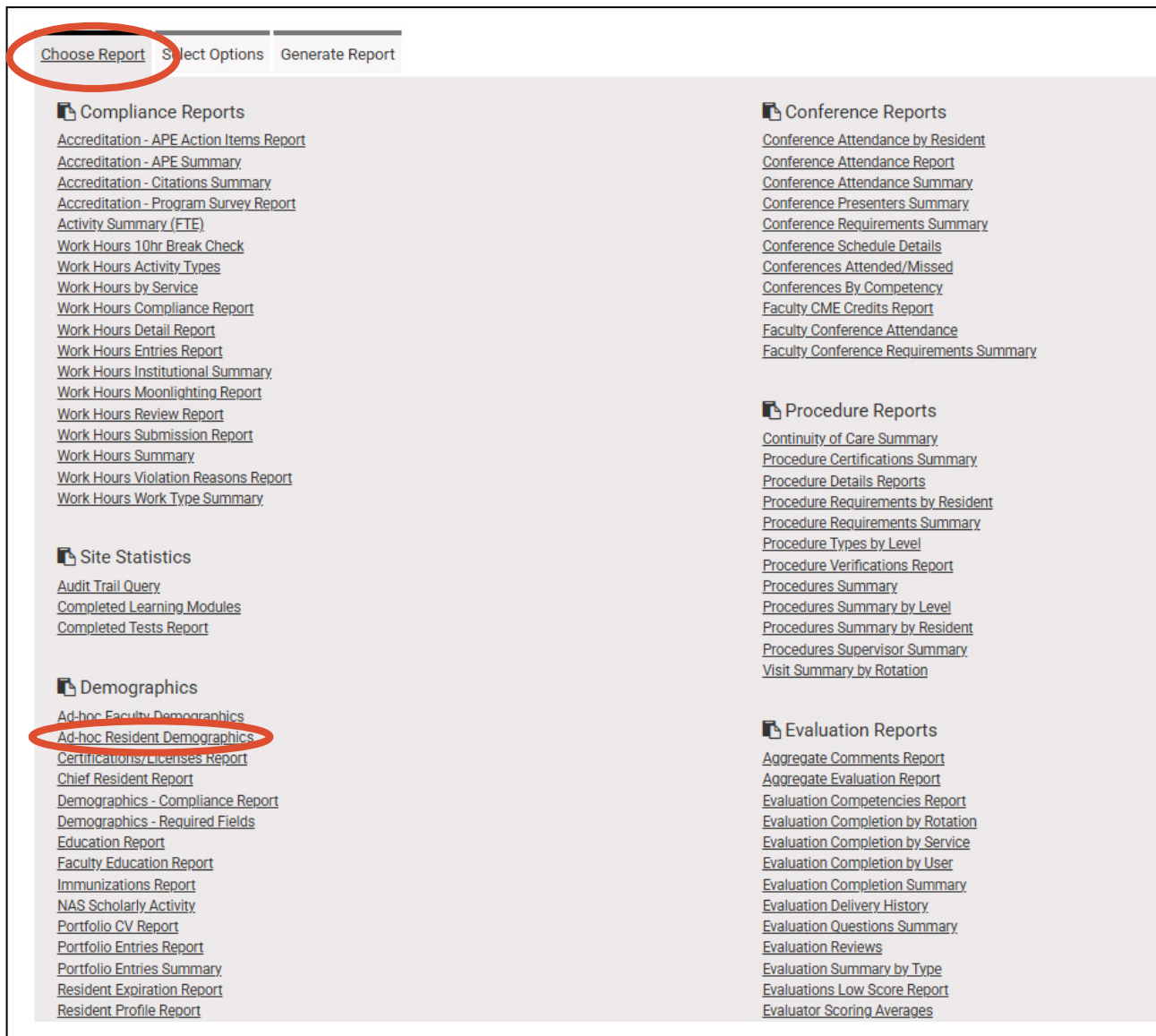


These instructions explain how to export a report from MedHub to utilize in the ABS EPA App™ batch upload process. **Programs are neither expected nor required to follow these steps in order to complete a batch upload in the ABS EPA App™.**

1. Log in to MedHub and select “Reports.”



2. Click on the “Choose Report” tab and select “Ad-hoc Resident Demographics” under the *Demographics* section.



3. Select your program type(s), all applicable PGY years, and all related trainee types.

4. Make sure your Resident Status is marked “Active only” and Name Formatting is set to “First | Last (Multiple Columns).”

5. Select the following boxes under the “Summary Information to Include” section:

- PGY
- Trainee Type

6. Select the following boxes under the “Contact Information to Include” section:

- Email
- Email (Secondary)
- Cell Phone/Home Phone*

* Note that your institution may require Cell or Home Phone

7. Click the “Go to Step 3...” button.

Program(s):*
 Radiology - Interventional (Integrated)
 Surgery - General
 - Abdominal Multi-Organ Transplantation Surgery
 - Burn Surgery
 - General Surgery Research
 - Minimally Invasive Bariatric Surgery
 - Multidisciplinary Breast Surgery
 - Pediatric Surgery

PGY(s):*
 PGY 0
 PGY 1
 PGY 2
 PGY 3
 PGY 4
 PGY 5
 PGY 6
 PGY 7

Trainee Type(s):*
 Resident
 Resident - Chief
 Resident - Dental
 Resident - Preliminary
 Resident - Research
 Fellow - Accredited
 Fellow - Associate
 Fellow - Research

Shift/Ctrl keys to select multiple

Resident Status:*
 Active only

Start Date: 07/01/2025
 End Date: 06/30/2026
 Paid By: All

Residents to display:*
 All

Hospital/Employer:
 All

Name formatting:*
 First | Last (Multiple columns)

Sort by:*
 Resident PGY

Name rendering options:
 Display PGY
 Display Middle Name
 Display Title
 Display Suffix
 Display Degree (suffix)
 Display Alternate Name

Summary Information to Include:

<input type="checkbox"/> Aliases	<input type="checkbox"/> Residency Start Date	<input type="checkbox"/> MedHub ID
<input checked="" type="checkbox"/> PGY	<input type="checkbox"/> Institution Start Date	<input type="checkbox"/> Program Director
<input type="checkbox"/> Department	<input type="checkbox"/> Current Program Start Date	<input type="checkbox"/> Program Director's Email
<input type="checkbox"/> Specialty	<input checked="" type="checkbox"/> Trainee Type	<input type="checkbox"/> Program Administrator
<input type="checkbox"/> Last Updated	<input type="checkbox"/> Degree (Name)	<input type="checkbox"/> Program Administrator's Email
<input type="checkbox"/> Appt Type	<input type="checkbox"/> Currently Reimbursable	<input type="checkbox"/> Mentors Assigned
<input type="checkbox"/> Status	<input type="checkbox"/> Current Funding Code(s)	<input type="checkbox"/> Alumni Status
<input type="checkbox"/> Program	<input type="checkbox"/> ACGME Program #	
<input type="checkbox"/> Program Abbreviation	<input type="checkbox"/> Track	

Contact Information to Include:

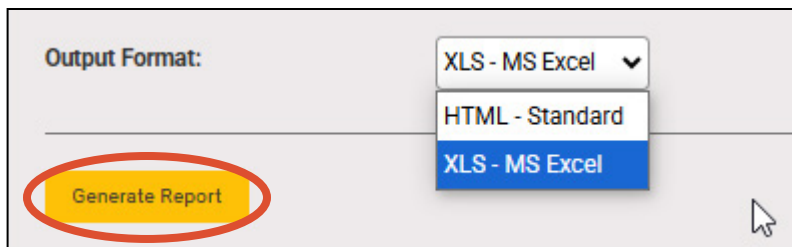
<input checked="" type="checkbox"/> E-Mail Address	<input type="checkbox"/> Permanent Address	<input type="checkbox"/> Ulowa Email Address
<input checked="" type="checkbox"/> E-Mail (secondary)	<input type="checkbox"/> Internal Address	<input type="checkbox"/> Facility Phone
<input type="checkbox"/> Pager	<input type="checkbox"/> Home Phone	<input type="checkbox"/> Facility Fax
<input type="checkbox"/> Mailbox	<input type="checkbox"/> Work Phone	<input type="checkbox"/> Cell Phone Carrier
<input type="checkbox"/> Current Address	<input checked="" type="checkbox"/> Cell Phone	<input type="checkbox"/> Cell Phone Type
<input type="checkbox"/> Emergency Contact	<input type="checkbox"/> Fax Number	
<input type="checkbox"/> Other Address	<input type="checkbox"/> Contact Comments	

Funding Information to Include:

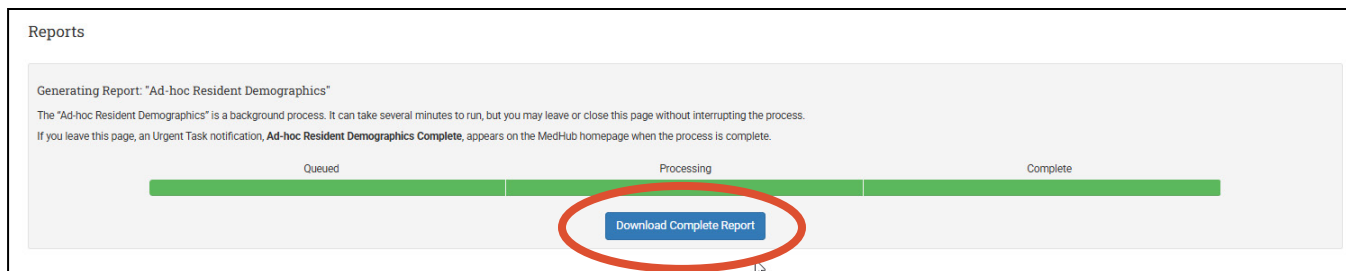
Funding Comments

Go to Step 3...

8. Change the output format to “XLS - MS Excel” and select “Generate Report.”



9. Select “Download Complete Report.”



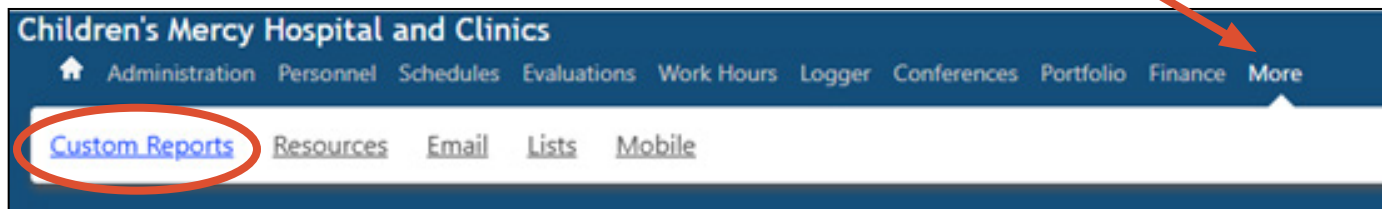
TIPS:

- You may need to manually enter any fields that are blank.
- Once the report is exported into an Excel file, you can reorganize the information in the way that is most useful to you. Please note that doing so could change the data in specific columns.
- Because of different organization rules, some information such as home phone vs. mobile phone or primary email vs. institution email may lead to discrepancies or gaps in information provided.
- To use the exported MedHub file as the file for your batch upload into the ABS EPA App™, please ensure that your column headers match those identified in the ABS EPA App™ spreadsheet template.

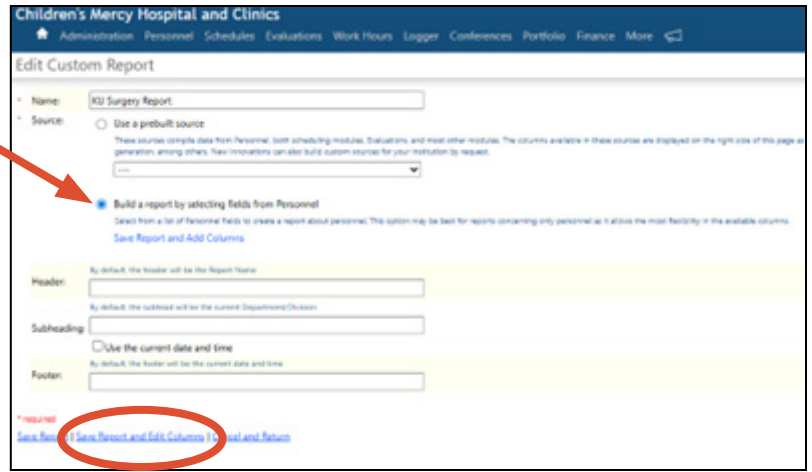
New Innovations Template Instructions

These instructions explain how to export a report from New Innovations to utilize in the ABS EPA App™ batch upload process. *Programs are neither expected nor required to follow these steps in order to complete a batch upload in the ABS EPA App™.*

1. Log in to New Innovations and select “Custom Reports” from the “More” menu.



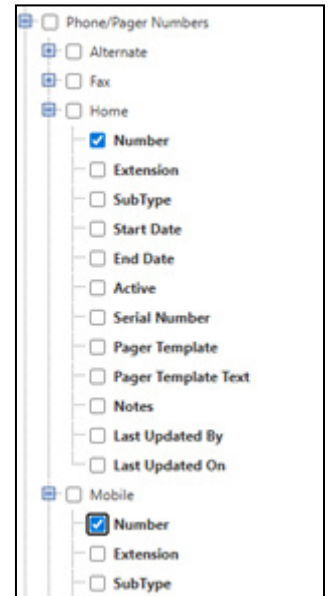
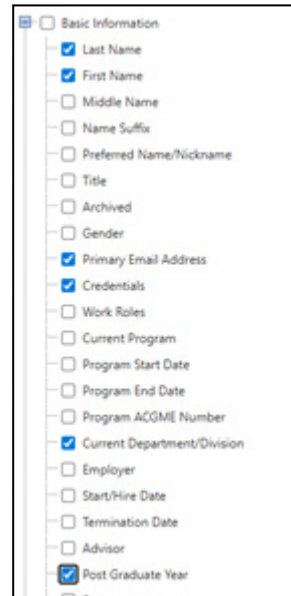
- Type in the name of the report and select "Build a report by selecting fields from Personnel."
- Click "Save Report and Edit Columns."



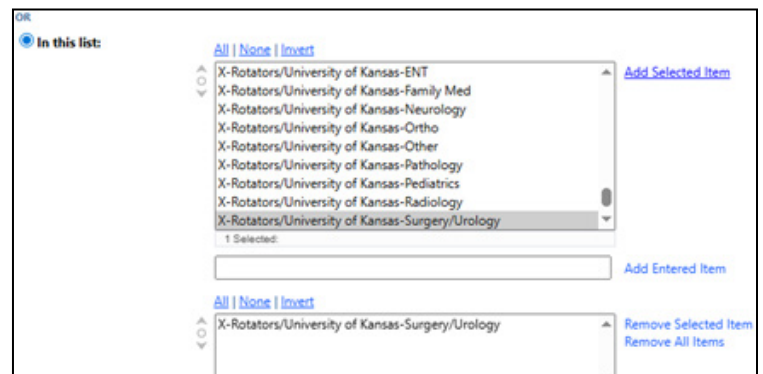
- Use the + signs next to fields to check the columns you'd like included in the report, then click "Save" in the bottom left corner.

The next page allows you to move the columns either up or down, or you can click on "Filter" next to each column to give specific instructions about the data. There's also an option on the left to "Show/Hide" columns.

This is also the place where you will need to designate what departments you'd like the data to come from:



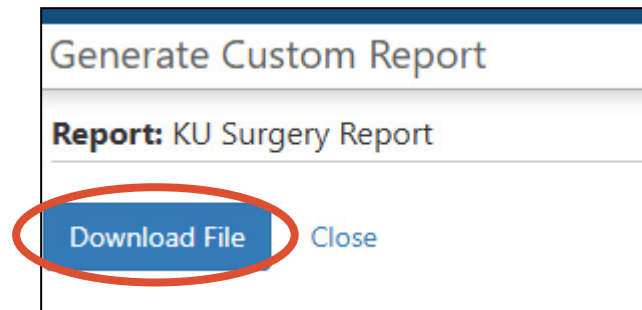
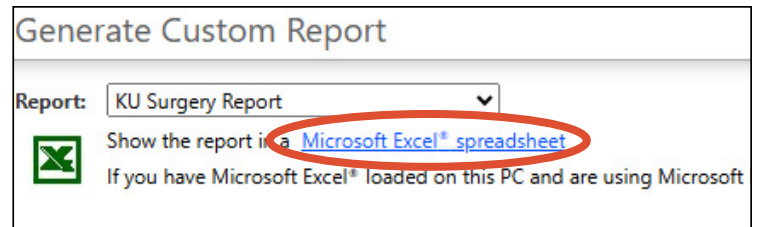
- Click "Filter" and then select "In this list:" to add the programs you want included. Selected programs will appear in the lower box. The report will only pull data from the programs specified.
- Click "Save Filter" in the bottom left.
- Once you have the right columns for your report, click "Generate Report."



5. Click the hyperlinked text for “Microsoft Excel Spreadsheet.”
6. Finally, click the “Download File” button.

TIPS:

- Once the report is exported into an Excel file, you can reorganize the information in the way that is most useful to you. Please note that doing so could change the data in specific columns.
- Because of different organization rules, some information such as home phone vs. mobile phone or primary email vs. institution email may lead to discrepancies or gaps in information provided.
- To use the exported New Innovations file as the file for your batch upload into the ABS EPA App™, please ensure that your column headers match those identified in the ABS EPA App™ spreadsheet template.



Have Questions or Need Assistance?

For technical assistance related to the ABS EPA App™, please contact the Firefly team at help@fireflylab.org

For any other EPA-related questions, please contact the ABS team at epas@absurgery.org