



CaRMS Online

Technical guide for programs: File review setup, filter setup and file review

This guide is designed to facilitate your use of the CaRMS Online system.

Browser compatibility

CaRMS supports the following browsers:

For PC:

[Chrome](#) (recommended for the best user experience)

[Firefox](#) 14.0 or higher

[Internet Explorer 9*](#)

For MAC:

[Chrome](#) (recommended for the best user experience)

[Safari](#) 5.0 or higher

* If you have upgraded to the newer Internet Explorer (IE) 10, you will experience some difficulties accessing the CaRMS Online system. Activating “Compatibility view” under “Tools” in the browser is recommended. IE8 also has limited functionality.

If you are not using a supported browser, unexpected errors will occur. We apologize for any inconvenience, and recommend that you upgrade to a supported browser.

Contact

If you have any questions about this guide, please contact communication@carms.ca.

Version history

Version	Date	Description of changes
1.0	November 24, 2014	Initial version

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Logging into CaRMS Online

1. Visit carms.ca. Click on **Login** at the top right of the homepage. Note: The login is also accessible from the top right of every page on carms.ca.
2. Select Applicant, faculty and referee login (CaRMS Online).
3. On the CaRMS Online login page, enter your username and password. Click **LOGIN**.

If you do not know your username or password, click **Forgot your user name or password?** Enter your username or email address to retrieve your information. An email will be sent to the address you used to register your account.

File reviewer setup

Create file reviewer accounts.

1. Place your cursor over **MATCH**. A drop-down menu will appear. Select **File Reviewer Users**.
2. Search for file reviewers by Match, Program and Quota Stream. If no file reviewers appear in your list, no file reviewers have been added.

Note: You can only search for programs that you have in your program list. If you cannot find a program that is part of your program list, please contact communication@carms.ca.

3. Add a new file reviewer by clicking on **Add File Reviewer**.
4. Enter the new file reviewer's information. Mandatory fields are marked by a red asterisk (*).

Note: Carefully review the file reviewer's email address for errors. We recommend asking the file reviewer if they already have a CaRMS Online account and if so, use the same email address to add them. This will help eliminate the creation of duplicate accounts.

5. Select the access level for the file reviewer.
6. Click **ADD FILE REVIEWER**. The file reviewer will appear in your list of file reviewer users and their user information will automatically be sent

7. Send user information to the file reviewer by clicking on the envelope icon.
8. Edit a file reviewer by clicking on the pen icon. You may change the reviewer's access level or delete them as a file reviewer. Click **SAVE** to save your changes and continue.
9. Export a list of file reviewers currently added for your program by clicking on Export **File Reviewer List**.

Filter setup

Create filters for your file reviewers.

1. Place your cursor over **MATCH**. A drop-down menu will appear. Select **Filters**.
2. Select the **Match** and **Program**.
3. Click the **Global filters** tab to view the list of CaRMS filters.

CaRMS filters are available to all programs and are automatically available to all file reviewers. Remove a global filter by unchecking the box in the **Publish** column of the filter list.

4. View custom filters by clicking on the **Custom filters** tab. Once created, custom filters will be listed in your custom filters list on your view application page.

Custom filters allow you to create personalized filters for use by your file reviewers.

5. Create a new custom filter by clicking on **Create new filter**.
6. Enter a **Filter name** and **Description**. Select **AND** or **OR**. Using AND will identify applicants who meet all filter criteria. OR will identify applicants who meet any filter criteria.
7. Select the **Criteria**. Enter a **Condition** and **Value**.
8. Test the filter by clicking on the green play arrow. A red X will display if the filter is incomplete.
9. Click **SAVE** to add the filter to your list of custom filters.

Note: To create a filter that combines elements of the same type (i.e., examination type), you must create a separate filter for each element, then combine them to create the desired filter.

10. Copy custom filters to the program selected on the Filters page by clicking on **Copy filters**. Select the **Program** from which you wish to copy from the drop-down menu. Select the appropriate filters and click **COPY**. The copied filter(s) will be added to the list of custom filters for the program selected on the Filters page.

File review – view application

10. Place your cursor over **MATCH**. A drop-down menu will appear. Select **View Application**.
11. Select the **Match**. Any programs that have been assigned to you for file review will be listed.
12. Click on the program you wish to review.
13. Switch to a different program by clicking on the back arrow in the upper left of the screen.
14. Select an applicant by clicking on their name on the left side of the screen.
15. View the different sections of the application by clicking on the section names in blue.
16. Generate a printable PDF of an entire application or individual sections of an application by selecting: **VIEW ENTIRE APPLICATION; VIEW APPLICATION DATA ONLY; VIEW DOCUMENTS ONLY; VIEW SUMMARY**.
17. Apply filters by clicking **ADD FILTER** in the filters section on the right side of the page. Select a filter from the drop-down menu. Click **RUN FILTER**.

Combine filters to search for multiple applicant groups. Click **ADD** to add additional filters or **OR** to search for two different filters. Click **SEARCH**.

Remove a filter by clicking the **X**.

18. Switch applicants by clicking on the applicant's name or clicking **PREVIOUS APPLICANT** or **NEXT APPLICANT**.

File review – print application

1. Place your cursor over **MATCH**. A drop-down menu will appear. Select **Print** under the **FILE REVIEW** menu.
2. Select the **Match**. Any programs that have been assigned to you for file review will be listed.
3. Click on the program you wish to print.
4. Select applicants from the list on the left side of the screen by checking the box to the left of their name.
5. Select the items you wish to print under **DATA and DOCUMENTS** on the right. Click **SELECT ALL OPTIONS** to select all elements or check individual boxes to select certain elements.
6. Click **DOWNLOAD PRINTABLE VERSION** to generate a PDF of your chosen applications.

File review – export data

1. Place your cursor over **MATCH**. A drop-down menu will appear. Select **Export Data**.
2. Select the **Match**. Any programs that have been assigned to you for file review will be listed.
3. Click on the program you wish to export.
4. Export data for the applicants listed on the left side of the screen. Apply filters by clicking **ADD FILTER** in the filters section on the right side of the page. Select a filter from the drop-down menu. Click **RUN FILTER**.
5. Select the data you wish to print. Click **SELECT ALL** to include all elements or check individual boxes to select certain elements.
6. Click **EXPORT** to export the data into an Excel file.



Canadian Resident
Matching Service

The Canadian Resident Matching Service (CaRMS) is a national, not-for-profit, fee-for-service organization established in 1969 at the request of medical students seeking an independent entity to provide a fair and transparent application and matching service for entry into postgraduate medical training throughout Canada.