



CaRMS Online Referee Manual

Before you begin using CaRMS Online, please note that we recommend using a supported browser.

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.

Table of contents:

1-Creating a referee account	3
1.1-Returning user	4
1.2-New user	5
2-User account	7
3-Finding a reference request	9
4-Submitting a letter of reference online	11
4.1-Uploading a letter	12
4.2-Typing a letter online	13
5-Archived list of reference requests	15
6-Referee preferences	16

1-Creating a referee account

If you have not yet created an account for the current R-1 Main Residency Match, visit: <https://phx.e-carms.ca/phoenix-web/referee/register> to register.

If you received a reference request email from CaRMS, a link to the login page can be found in the body of the email. Clicking this link will automatically add the applicant's request to your account. For instructions on submitting the letter online, please see section 4 of this manual.

DO NOT STAPLE

**Letter of Reference -
Reference Request Cover Sheet**

2014 R-1 Match - First Iteration

2013-09-23 15:00:10 UTC



To: Dr. Pinot Portero	Requested by:	Modales, Ricardo
34 Fiala	CaRMS ID :	BE970XD987
Contrano, United Arab Emirates	Request ID:	NNQVVLYW
	Language Requested:	English
	Reference Details:	Adult Cardiac Electrophysiology

Dear Dr. Pinot Portero,

I, Ricardo Modales (CaRMS ID: BE970XD987) would like to request that you provide a letter of reference in support of my application to residency training (Adult Cardiac Electrophysiology).

In order to ensure program directors receive the information they need to evaluate applicants, CaRMS recommends the letter include:

- A confidentiality statement indicating whether or not I have seen or will receive a copy of this letter
- The date the letter was written
- The time and duration of your contact with me
- Assessment of my:
 - Cognitive skills and knowledge
 - Problem solving and patient management skills
 - Behaviour and attitudinal skills
 - Communication skills and working relationships
- Motivation and punctuality
- Sense of responsibility.
- Procedural skills specific to the discipline
- Special qualities and unique contributions

If you are unable to comment on a specific component of my performance in any of the above categories, please indicate that you have not observed or do not have knowledge of that specific component.

Reference Letter Submission Instructions from CaRMS:

You may submit your letter in one of two ways:

1. Online

1

 Create an account in CaRMS Online at <https://phx-pte.e-carms.ca/phoenix-web/referee/register> or click the link in the email sent to you by the applicant. If the letter is submitted online, you do not need to send this cover sheet to CaRMS.
2. Mail
 Attach this cover sheet to an original copy of the letter and mail it to the CaRMS Document Centre at the address below. Do not send a copy to the applicant. Please indicate the match (e.g. 2014 R-1 First Iteration) in which the applicant is participating on the envelope. We recommend sending documents by courier or traceable mail to ensure delivery.

Before sending the reference letter to CaRMS, please ensure:

- The letter is an original (not a photocopy), prepared on letterhead
- The letter has been signed in BLACK INK
- The reference request ID has been recorded on the letter (e.g. "RE: John Smith, reference request ID ABCDEFGH")

CaRMS Document Centre
380 Hunt Club Rd. Suite 105
Ottawa, ON, Canada K1V 1C1
tel: 1.877.227.6742



Figure 1.1

1. Click the link to register for a referee account.

1-1. Returning user



Figure 1.2

1. If you are a returning user, click **I already have a CaRMS Online account**. If you are a new user, select **I do not have a CaRMS Online account, proceed with registration**.

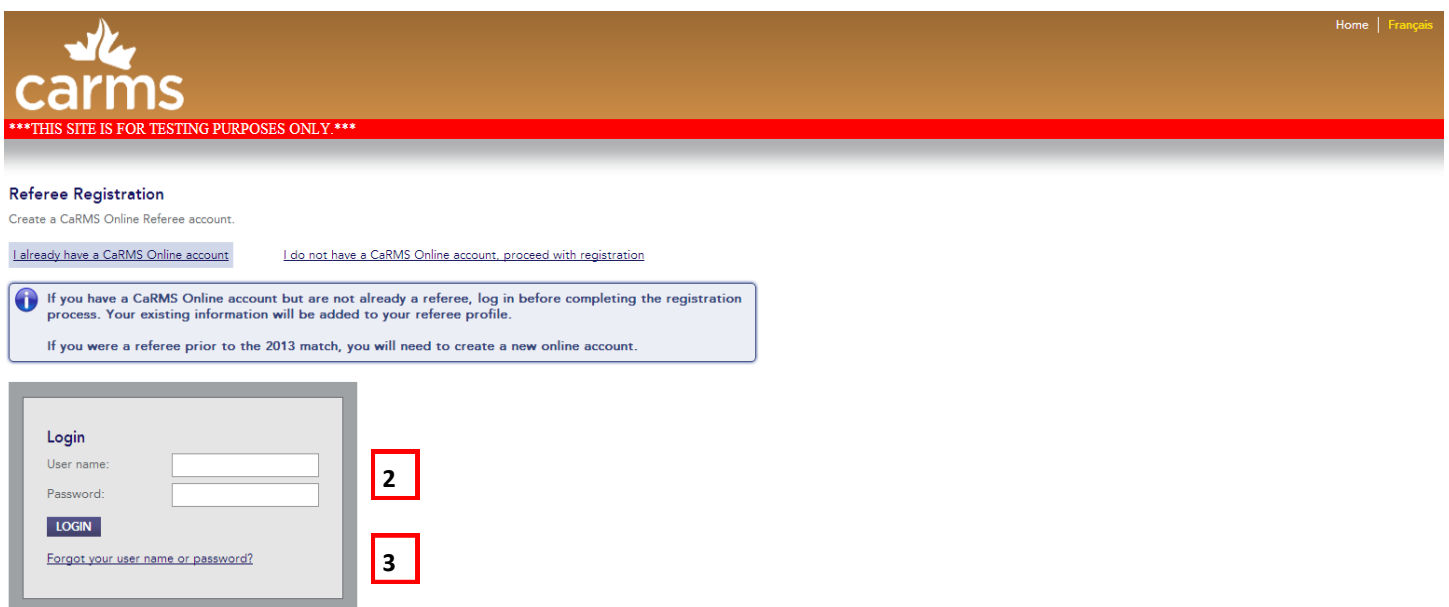


Figure 1.3

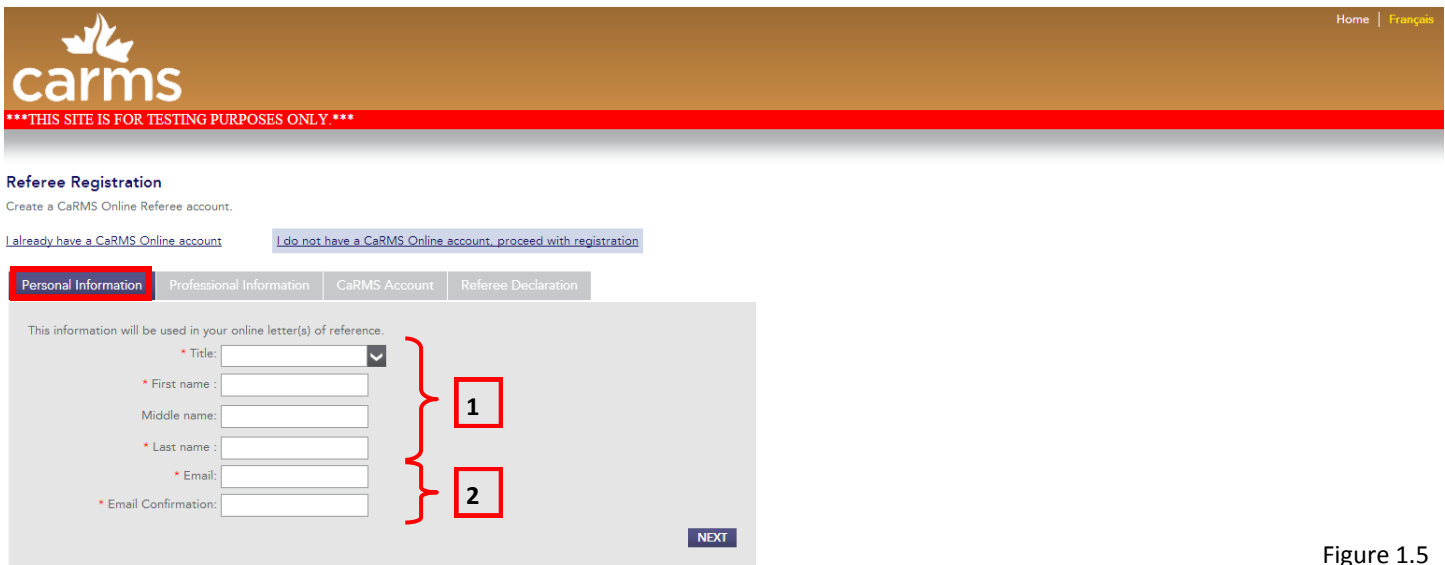
2. If you have selected the first option, enter your username and password.

Note: If you have a referee account for the MSM, FM/EM or Pediatric Subspecialty matches, or for an R1 Main Residency Match prior to the 2013 Match, you must create a new referee account.
3. If you do not know your username or password, select **Forgot your user name or password?** Enter your username or email address. An email will be sent to the email address used when you registered for your account.



Figure 1.4

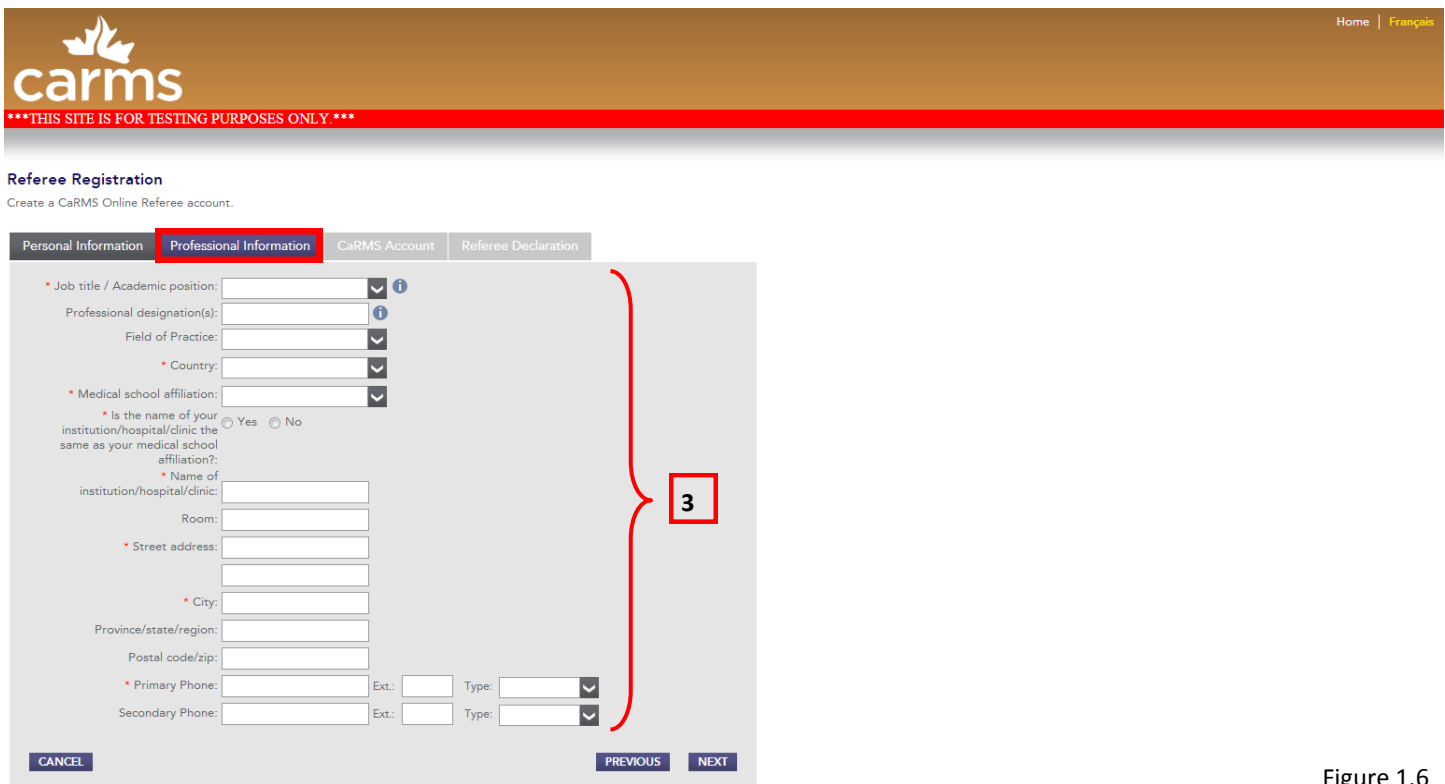
1-2. New user



The screenshot shows the 'Referee Registration' page with the 'Personal Information' tab selected. The form includes fields for Title, First name, Middle name, Last name, Email, and Email Confirmation. A red bracket groups the first four fields with a red box containing the number '1'. Another red bracket groups the Email and Email Confirmation fields with a red box containing the number '2'. A 'NEXT' button is at the bottom right.

Figure 1.5

1. Enter the required information. The personal information you enter will appear in the header of your letter if you decide to type it online.
2. Enter your email address. If the system informs you that the email address is in the system, this means you already have an account at CaRMS. If you have a program user account, you may add the referee role to your account. Select **I already have a CaRMS Online account** to log into your account.



The screenshot shows the 'Referee Registration' page with the 'Professional Information' tab selected. The form includes fields for Job title / Academic position, Professional designation(s), Field of Practice, Country, Medical school affiliation, and a section for institution/hospital/clinic details (Name, Room, Street address, City, Province/state/region, Postal code/zip, Primary Phone, Secondary Phone). A red bracket groups all these fields with a red box containing the number '3'. 'CANCEL', 'PREVIOUS', and 'NEXT' buttons are at the bottom.

Figure 1.6

3. Enter the required information. Some of this information will appear in the header of the letter if you decide to type it online. Required fields are marked by a red asterisk (*).

Referee Registration

Create a CaRMS Online Referee account.

Personal Information
Professional Information
CaRMS Account
Referee Declaration

* User name:

* Password:

* Password confirmation:

Please choose three security questions and answers.
It is recommended that your answers are known only to you.

* Security question:

* Answer:

* Security question:

* Answer:

* Security question:

* Answer:

User name Requirements

- ✓ 6-20 characters
- ✓ No special characters allowed

Password Requirements

- ✓ 8-20 characters
- ✓ At least one uppercase and one lowercase letter
- ✓ At least one numeric digit
- ✓ At least one special character

1

2

3


CANCEL

PREVIOUS **NEXT**

Figure 1.7

1. Create a username for your CaRMS Online account. Usernames are not case sensitive. Do not use any special characters.
2. Create a password for your CaRMS Online account.
3. Create three security questions and answers. You will be asked one of these questions if you ever need to reset your password.

Note: Record your security answers and keep them in a safe place.



[Home](#) | [Français](#)

THIS SITE IS FOR TESTING PURPOSES ONLY.

Referee Registration

Create a CaRMS Online Referee account.

Personal Information
Professional Information
CaRMS Account
Referee Declaration

To proceed, accept the declaration and then click on 'REGISTER'.

Once your account has been registered, you will receive a confirmation email. You can then submit one or more reference letters electronically.

☐ * I hereby declare that the information I have provided is accurate and that it may be released to university program(s) for information purposes. I acknowledge that the letter(s) of reference I will submit will be kept confidential and will NOT be shared with the named individual(s).

CANCEL **REGISTER**

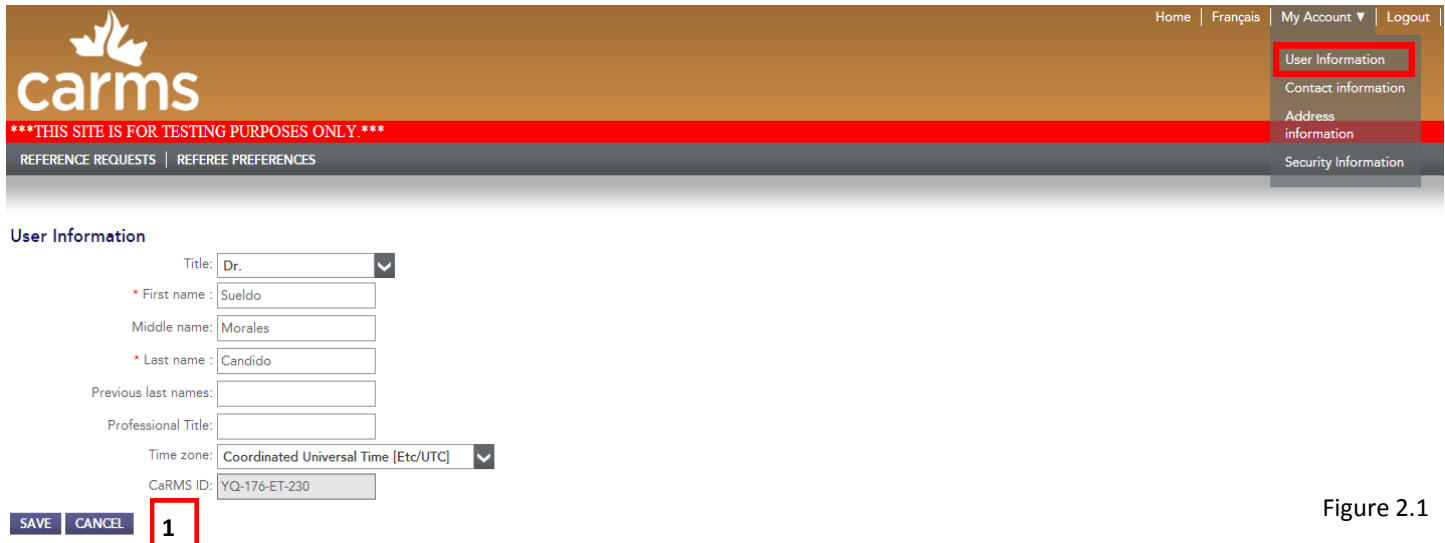
4

Figure 1.8

4. Click **REGISTER** to complete the registration process. Once your request for registration is complete, you will be directed to your referee account.

2-User account

You can modify you information at any time in the My Account section.



Home | Français | My Account ▼ | Logout

carms

THIS SITE IS FOR TESTING PURPOSES ONLY.

REFERENCE REQUESTS | REFEREE PREFERENCES

User Information

Title: Dr. ▼

* First name : Sueldo

Middle name: Morales

* Last name : Candido

Previous last names:

Professional Title:

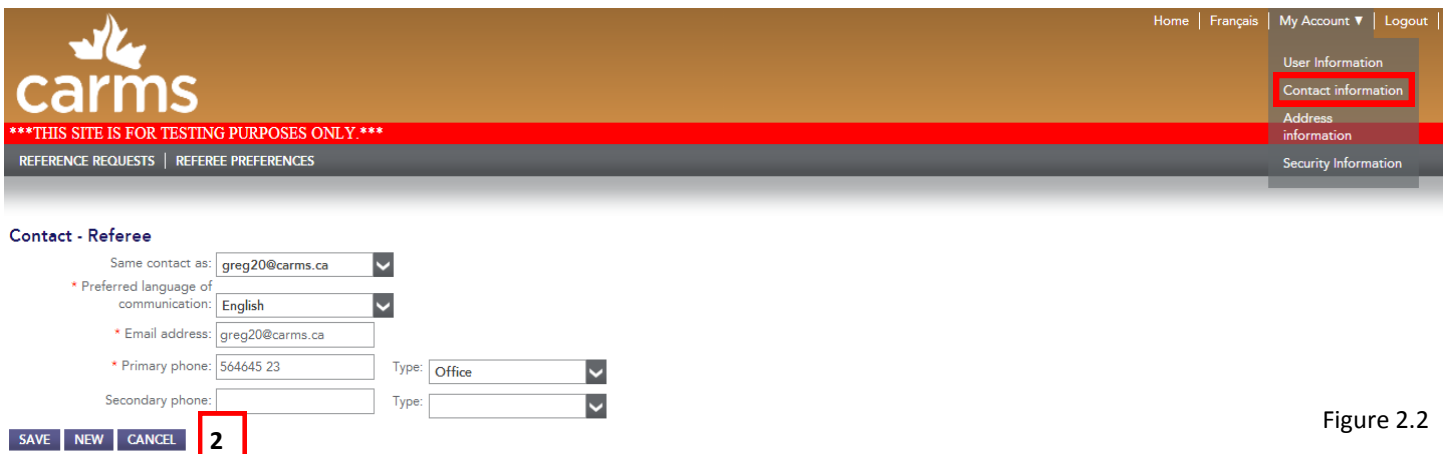
Time zone: Coordinated Universal Time [Etc/UTC] ▼

CaRMS ID: YQ-176-ET-230

SAVE CANCEL **1**

Figure 2.1

1. Enter your user information. You can modify this section at any time. This information will appear in the header of the letter if you decide to type it online. Click **SAVE** to continue.



Home | Français | My Account ▼ | Logout

carms

THIS SITE IS FOR TESTING PURPOSES ONLY.

REFERENCE REQUESTS | REFEREE PREFERENCES

User Information

Contact information

Address information

Security Information

Contact - Referee

Same contact as: greg20@carms.ca ▼

* Preferred language of communication: English ▼

* Email address: greg20@carms.ca

* Primary phone: 564645 23 Type: Office ▼

Secondary phone: Type: ▼

SAVE NEW CANCEL **2**

Figure 2.2

2. Enter your contact information. You can modify this section at any time. This information will appear in the header of the letter if you decide to type it online. To clear all fields in this section, click **NEW**. Click **SAVE** to continue.

Mailing Address - Referee

Same address as: 45 Calle Morela, Santiago, 6755 ▼

* Street address:

* City:

* Country:

Province/state/region:

Postal code/zip:

SAVE **NEW** **CANCEL**

1

Figure 2.3

1.

Enter your mailing address. You can modify this section at any time. This information will appear in the header of the letter if you decide to type it online. If you wish to clear all fields in this section, click **NEW**. Click **SAVE** to continue.

Security Information

* User Name:

* Current Password:

* New password:

* Confirm password:

The security questions and answers are for identification purposes. We recommend that the questions you choose have an answer that is known only to you.

* Security question:

* Answer:

* Security question:

* Answer:

* Security question:

* Answer:

SAVE **CANCEL**

User name Requirements

- ✓ 6-20 characters
- ✓ No special characters allowed

Password Requirements

- ✓ 8-20 characters
- ✓ At least one uppercase and one lowercase letter
- ✓ At least one numeric digit
- ✓ At least one special character

2

Figure 2.4

2.

Enter your security questions and answers. You can modify this information at any time. Click **SAVE** to continue.

3-Finding a reference request

To find a reference request, place your cursor over **REFERENCE REQUESTS** in the top left menu. A dropdown menu will open.

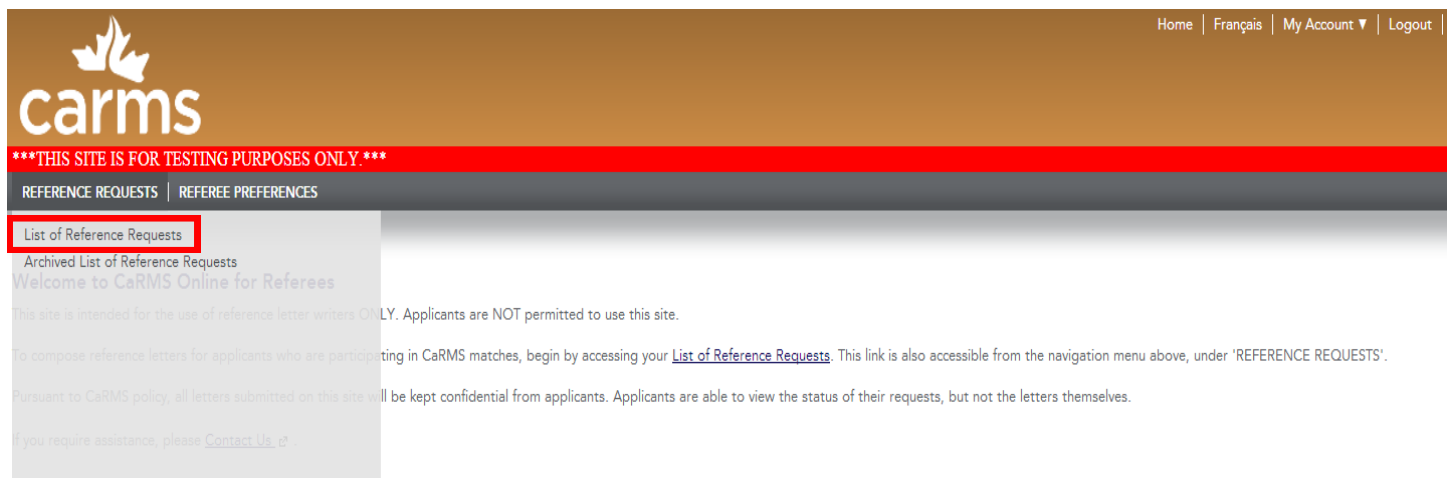


Figure 3.1

Select **List of Reference Requests** to see the reference requests in your referee account. If a reference request is not already on your list, you may add the reference request by clicking on **Find Reference Request**.

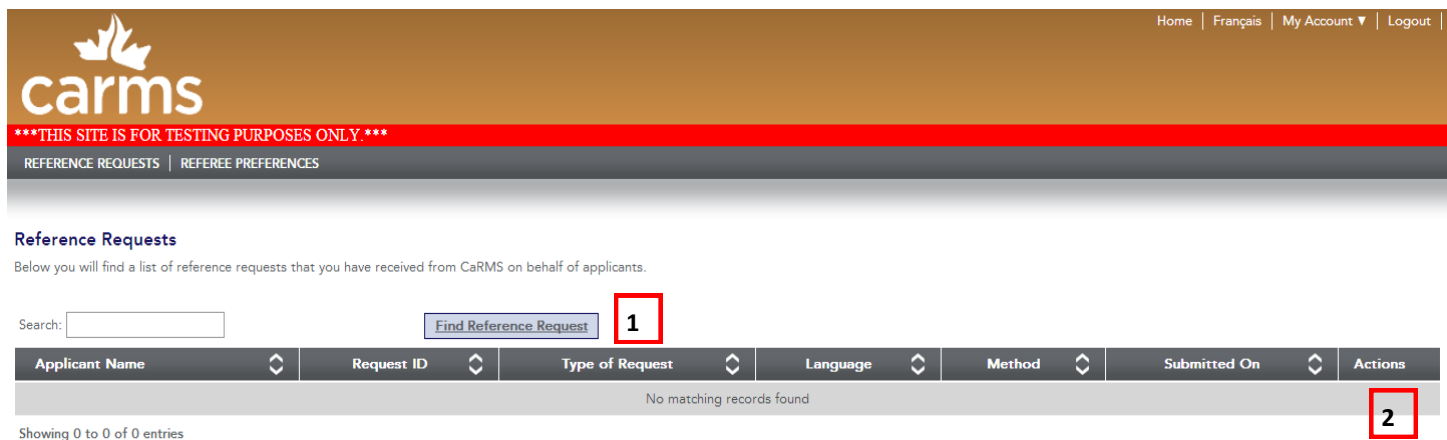
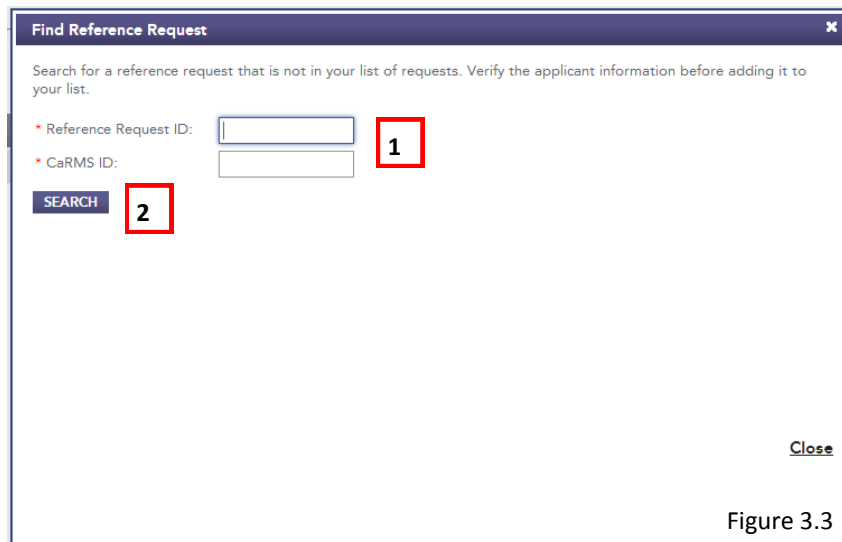


Figure 3.2

1. Click on **Find Reference Request** to search for a reference request.
2. Your reference request will appear on your list.



Find Reference Request

Search for a reference request that is not in your list of requests. Verify the applicant information before adding it to your list.

* Reference Request ID: **1**

* CaRMS ID:

SEARCH **2**

[Close](#)

Figure 3.3

- 1.** Enter the Reference Request ID (8 letters) and the applicants' CaRMS ID (two letters, three numbers, two letters and three numbers). You can find this information on the top right section of the reference request page received from the applicant.



DO NOT STAPLE

**Letter of Reference -
Reference Request Cover Sheet**

2014 R-1 Match - First Iteration

2013-09-24 13:52:05 UTC

To: Dr. Pinot Portero

34 Flala

Contrano, United Arab Emirates

Requested by: Modales, Ricardo

CaRMS ID : **BE970XD987**

Request ID: **NNQVVLYW**

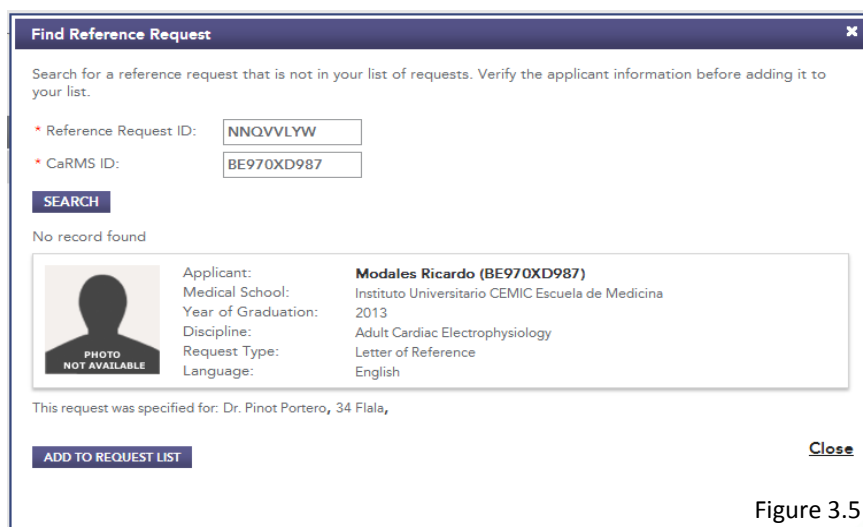
Language Requested: English

Reference Details: Adult Cardiac Electrophysiology

- 2.** Click **SEARCH**.

Figure 3.4

The applicants' details will appear below. Verify that that the information is correct and click **ADD TO REQUEST LIST** to add the request to your list.



Find Reference Request


Search for a reference request that is not in your list of requests. Verify the applicant information before adding it to your list.

* Reference Request ID:

* CaRMS ID:

SEARCH

No record found



Applicant: **Modales Ricardo (BE970XD987)**

Medical School: Instituto Universitario CEMIC Escuela de Medicina

Year of Graduation: 2013

Discipline: Adult Cardiac Electrophysiology

Request Type: Letter of Reference

Language: English

This request was specified for: Dr. Pinot Portero, 34 Flala,

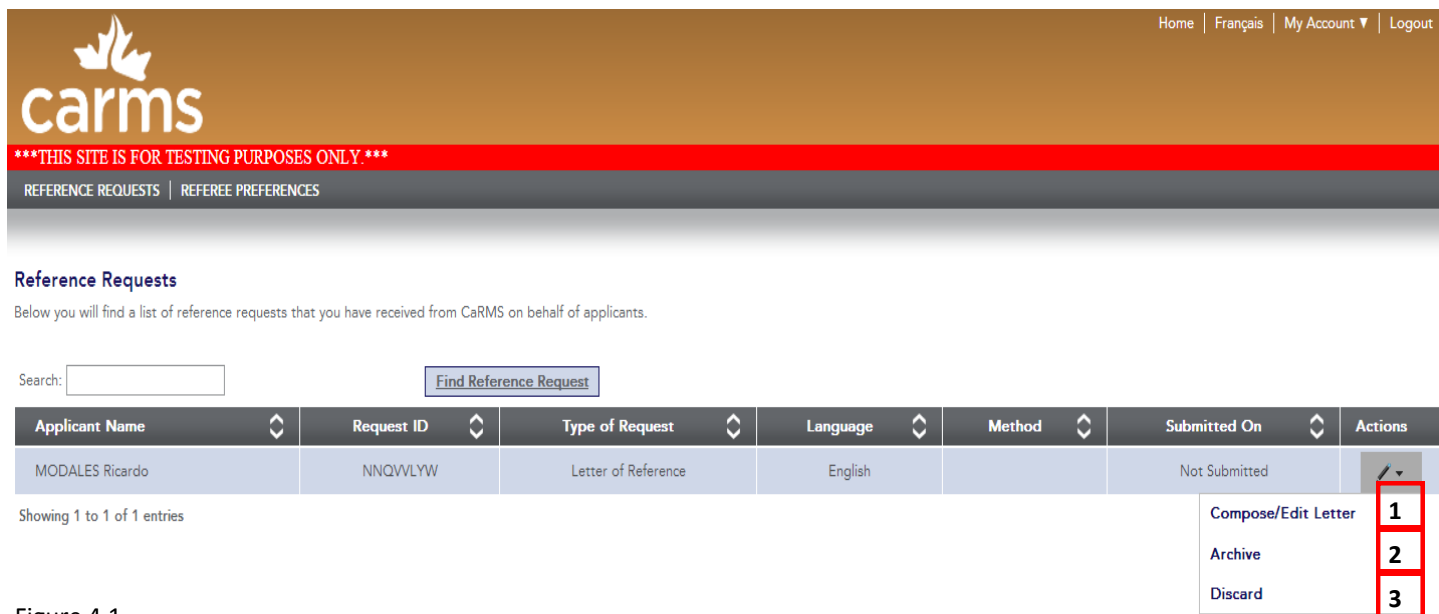
ADD TO REQUEST LIST

[Close](#)

Figure 3.5

4-Submitting a letter of reference online

Once the reference request has been added to your list you will be able to compose a letter. Select the reference request and click on **Compose/Edit Letter**.



Home | Français | My Account | Logout

carms

THIS SITE IS FOR TESTING PURPOSES ONLY.

REFERENCE REQUESTS | REFEREE PREFERENCES

Reference Requests

Below you will find a list of reference requests that you have received from CaRMS on behalf of applicants.

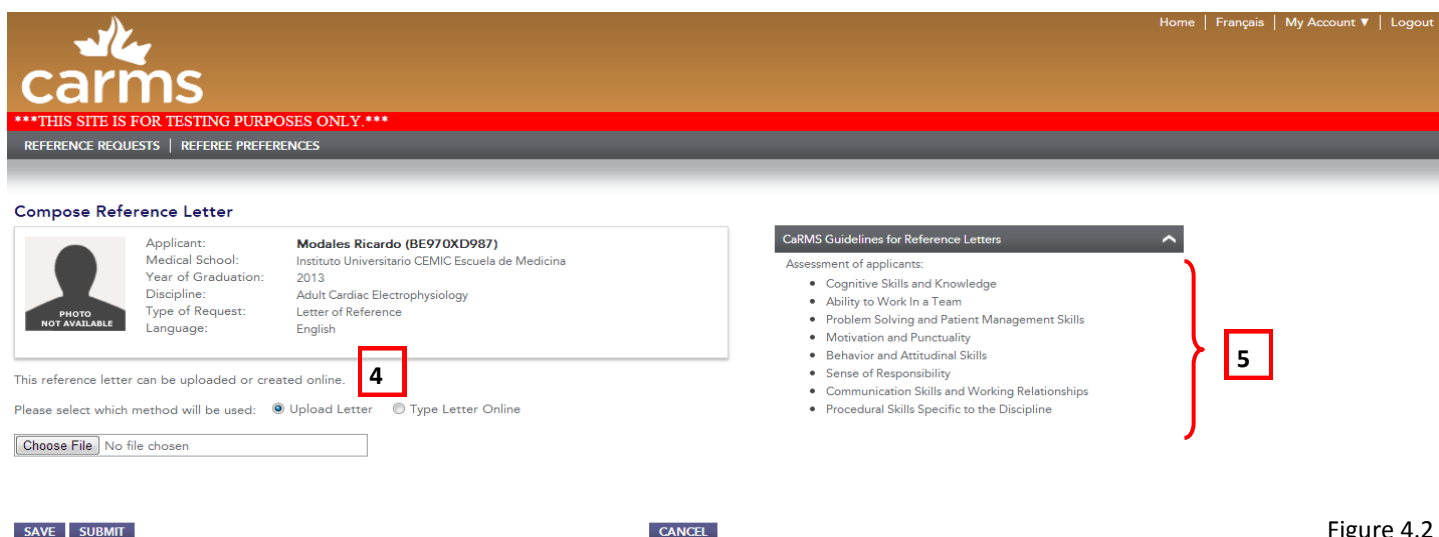
Search: [Find Reference Request](#)

Applicant Name	Request ID	Type of Request	Language	Method	Submitted On	Actions
MODALES Ricardo	NNQWLYW	Letter of Reference	English		Not Submitted	Compose/Edit Letter 1 Archive 2 Discard 3

Showing 1 to 1 of 1 entries

Figure 4.1

- 1.** Click on **Compose/Edit Letter** to upload or write a letter.
- 2.** Click on **Archive** to remove the reference request from your reference request list. The reference request will appear in your archived reference request section and can be restored.
- 3.** Click on **Discard** to delete a reference request. Once a request has been discarded, you will not be able to submit a letter. Discard reference requests that have been sent to you accidentally.



Home | Français | My Account | Logout

carms

THIS SITE IS FOR TESTING PURPOSES ONLY.

REFERENCE REQUESTS | REFEREE PREFERENCES

Compose Reference Letter

Applicant: **Modales Ricardo (BE970XD987)**
 Medical School: Instituto Universitario CEMIC Escuela de Medicina
 Year of Graduation: 2013
 Discipline: Adult Cardiac Electrophysiology
 Type of Request: Letter of Reference
 Language: English

PHOTO NOT AVAILABLE

This reference letter can be uploaded or created online. **4**

Please select which method will be used: ☒ Upload Letter ☐ Type Letter Online

[Choose File](#) No file chosen

[SAVE](#) [SUBMIT](#) [CANCEL](#)

CaRMS Guidelines for Reference Letters

Assessment of applicants:

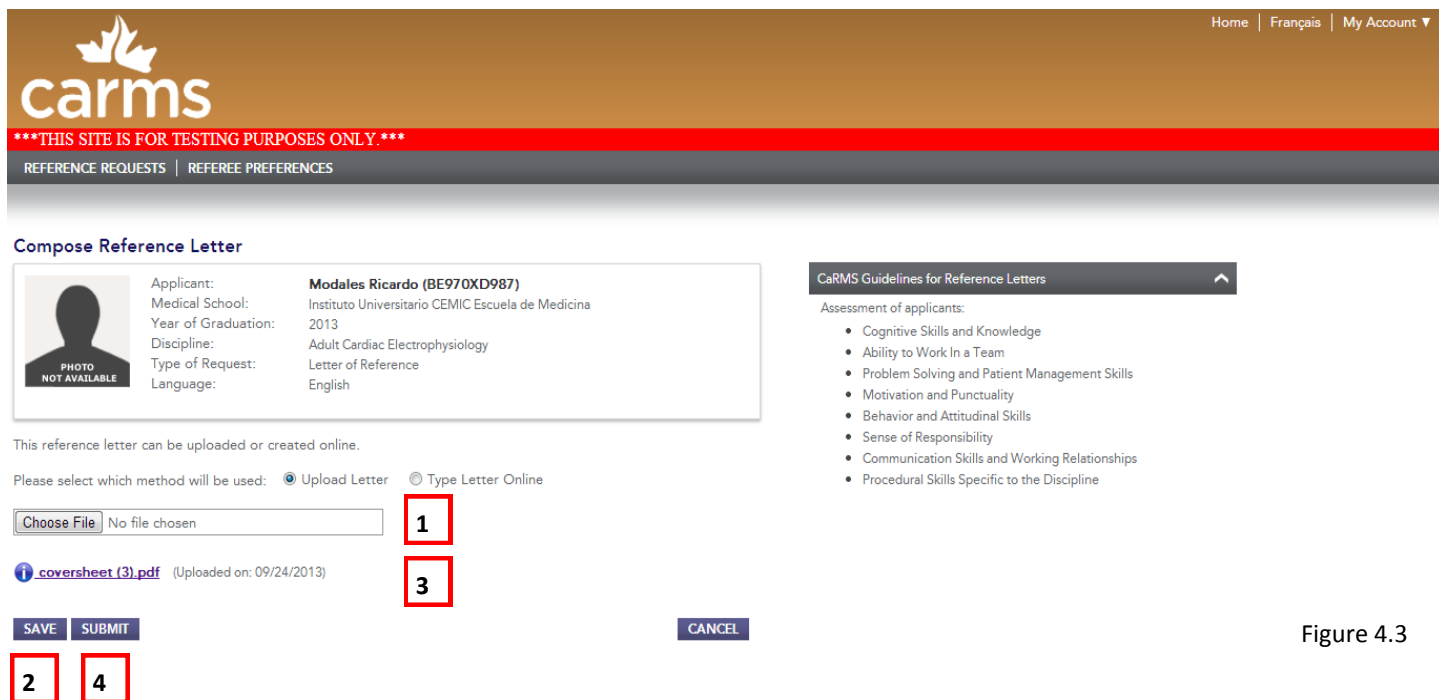
- Cognitive Skills and Knowledge
- Ability to Work In a Team
- Problem Solving and Patient Management Skills
- Motivation and Punctuality
- Behavior and Attitudinal Skills
- Sense of Responsibility
- Communication Skills and Working Relationships
- Procedural Skills Specific to the Discipline

5

Figure 4.2

- 4.** Select the method you would like to use: **Upload Letter** or **Type Letter Online**.
- 5.** The box on the right contains guidelines on what to include in the letter. These recommendations can also be found on the reference request received from the applicant.

4.1-Uploading a letter




Home | Français | My Account ▼

carms

THIS SITE IS FOR TESTING PURPOSES ONLY.

REFERENCE REQUESTS | REFEREE PREFERENCES

Compose Reference Letter



Applicant: **Modales Ricardo (BE970XD987)**
 Medical School: Instituto Universitario CEMIC Escuela de Medicina
 Year of Graduation: 2013
 Discipline: Adult Cardiac Electrophysiology
 Type of Request: Letter of Reference
 Language: English

This reference letter can be uploaded or created online.

Please select which method will be used: ☒ Upload Letter ☐ Type Letter Online

1 Choose File | No file chosen

3 [_coversheet \(3\).pdf](#) (Uploaded on: 09/24/2013)

2 **SAVE** **4** **SUBMIT** **CANCEL**

CaRMS Guidelines for Reference Letters

Assessment of applicants:

- Cognitive Skills and Knowledge
- Ability to Work In a Team
- Problem Solving and Patient Management Skills
- Motivation and Punctuality
- Behavior and Attitudinal Skills
- Sense of Responsibility
- Communication Skills and Working Relationships
- Procedural Skills Specific to the Discipline

Figure 4.3

1. To upload a letter, click on **Choose File**. Select the document you wish to upload.

Note: Letters must be in PDF format and no larger than 1.5MB.

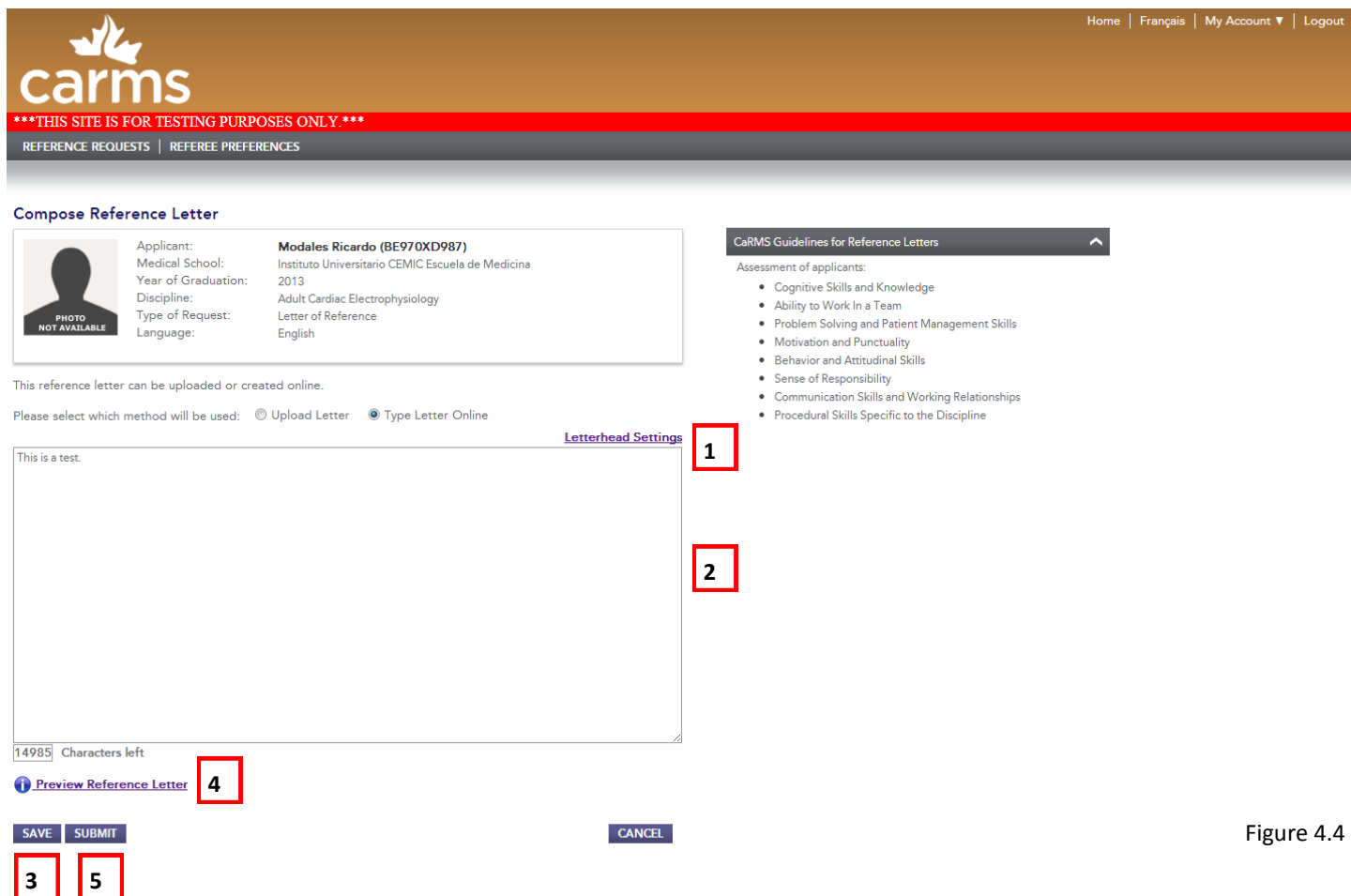
2. Click **SAVE** to continue.

3. Click on the name of the document to view it.

4. Click **SUBMIT** to finalize and submit the letter.

Note: If you have mistakenly submitted a letter that was not complete or needed editing, send a request to operations@carms.ca. The letter will be removed from the reference request and you will be able to upload a new version of the letter.

4.2-Type the letter online




Home | Français | My Account | Logout

carms

THIS SITE IS FOR TESTING PURPOSES ONLY.

REFERENCE REQUESTS | REFEREE PREFERENCES

Compose Reference Letter



Applicant: **Modales Ricardo (BE970XD987)**
 Medical School: Instituto Universitario CEMIC Escuela de Medicina
 Year of Graduation: 2013
 Discipline: Adult Cardiac Electrophysiology
 Type of Request: Letter of Reference
 Language: English

CaRMS Guidelines for Reference Letters

Assessment of applicants:

- Cognitive Skills and Knowledge
- Ability to Work In a Team
- Problem Solving and Patient Management Skills
- Motivation and Punctuality
- Behavior and Attitudinal Skills
- Sense of Responsibility
- Communication Skills and Working Relationships
- Procedural Skills Specific to the Discipline

This reference letter can be uploaded or created online.

Please select which method will be used: ☐ Upload Letter ☒ Type Letter Online

[Letterhead Settings](#)

This is a test.

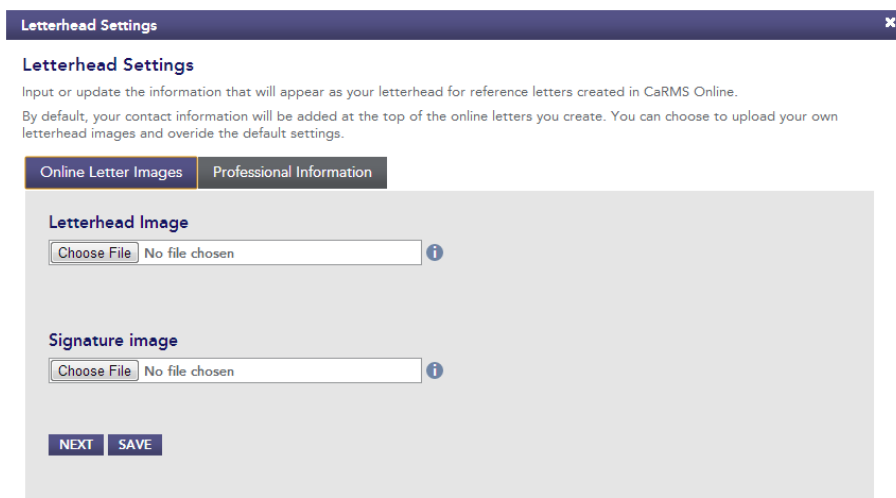
14985 Characters left

[Preview Reference Letter](#)

SAVE **SUBMIT** **CANCEL**

Figure 4.4

1. Click on **Letterhead Settings** to modify your letterhead. You can upload a letterhead image as well as a signature image from your computer. You can also modify the professional information that will be generated in the letterhead.



Letterhead Settings

Letterhead Settings

Input or update the information that will appear as your letterhead for reference letters created in CaRMS Online.

By default, your contact information will be added at the top of the online letters you create. You can choose to upload your own letterhead images and override the default settings.

Online Letter Images Professional Information

Letterhead Image

Choose File No file chosen

Signature image

Choose File No file chosen

NEXT **SAVE**

Close

Figure 4.5

2.

Type the letter in the box.

Note: To prevent any loss of information, we recommend that you type the letter in a word document first and save it on your computer. Copy/paste the letter into the box.

3.

Click **SAVE**.

4.

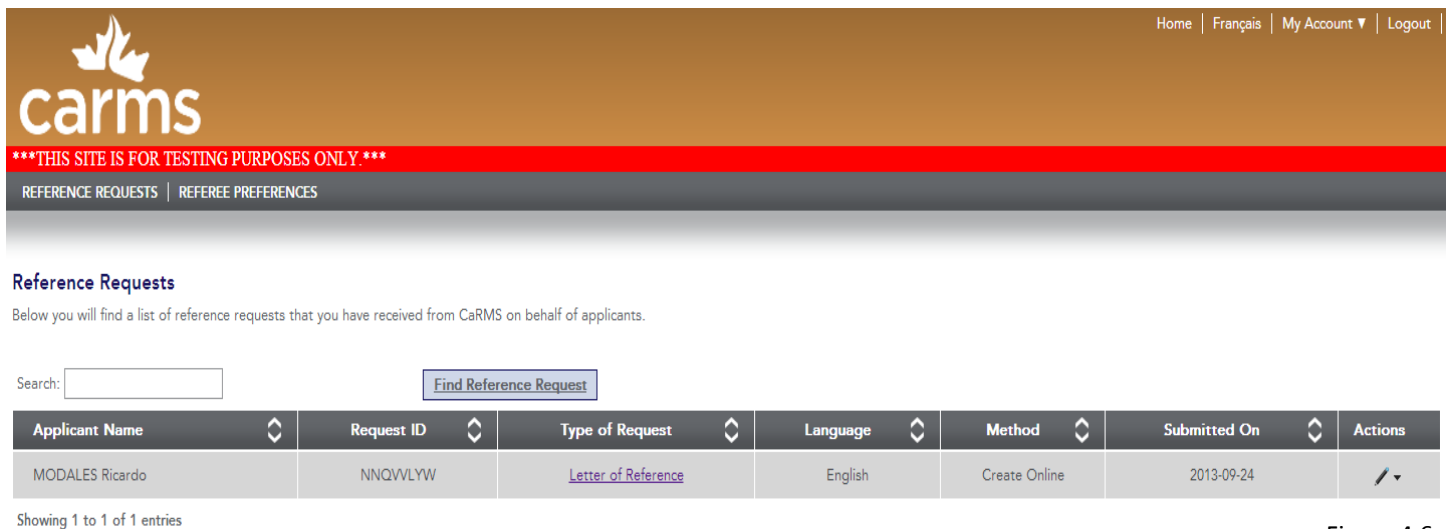
Click **Preview Reference Letter** to view the document.

5.


Click on **SUBMIT** to finalize and submit the letter.

Note: If you have mistakenly submitted a letter that was not complete or needed editing, send a request to operations@carms.ca. The letter will be removed from the reference request and you will be able to upload a new version of the letter.

Once submitted, the **Submitted On** column on your **Reference Requests** page will show the date the letter was submitted.



The screenshot shows the CarMS website interface. At the top, there is a navigation bar with links for Home, Français, My Account, and Logout. Below this is a red banner with the text "***THIS SITE IS FOR TESTING PURPOSES ONLY.***". The main content area is titled "Reference Requests" and includes a sub-header "Below you will find a list of reference requests that you have received from CaRMS on behalf of applicants." There is a search bar with the placeholder text "Search:" and a button labeled "Find Reference Request". Below the search bar is a table with the following columns: Applicant Name, Request ID, Type of Request, Language, Method, Submitted On, and Actions. The table contains one entry for MODALES Ricardo with Request ID NNQWLYW, Type of Request Letter of Reference, Language English, Method Create Online, and Submitted On 2013-09-24. The Actions column shows a pencil icon and a dropdown arrow. At the bottom of the table, it says "Showing 1 to 1 of 1 entries".

Applicant Name	Request ID	Type of Request	Language	Method	Submitted On	Actions
MODALES Ricardo	NNQWLYW	Letter of Reference	English	Create Online	2013-09-24	 ▼

Showing 1 to 1 of 1 entries

Figure 4.6

5-Archived List of Reference Request

Archive reference requests to remove them from your main list. You can archive a request to prevent yourself from accidentally submitting a letter under the wrong reference request. You can also archive reference requests that have already been completed to distinguish them from those that are still pending.

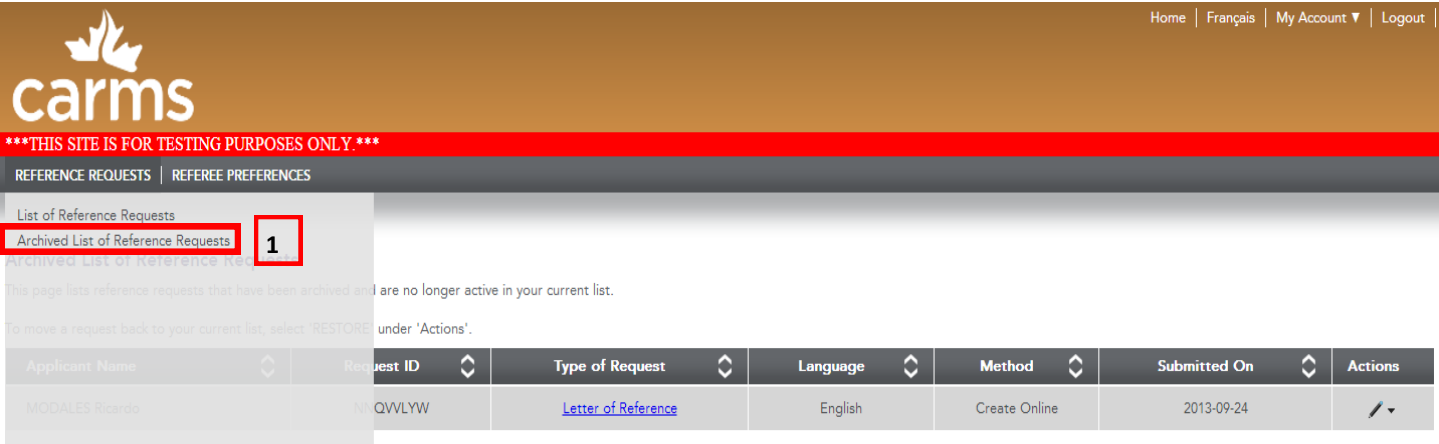


Figure 5.1

1. Select **Archived List of Reference Requests** under the **REFERENCE REQUESTS** menu.

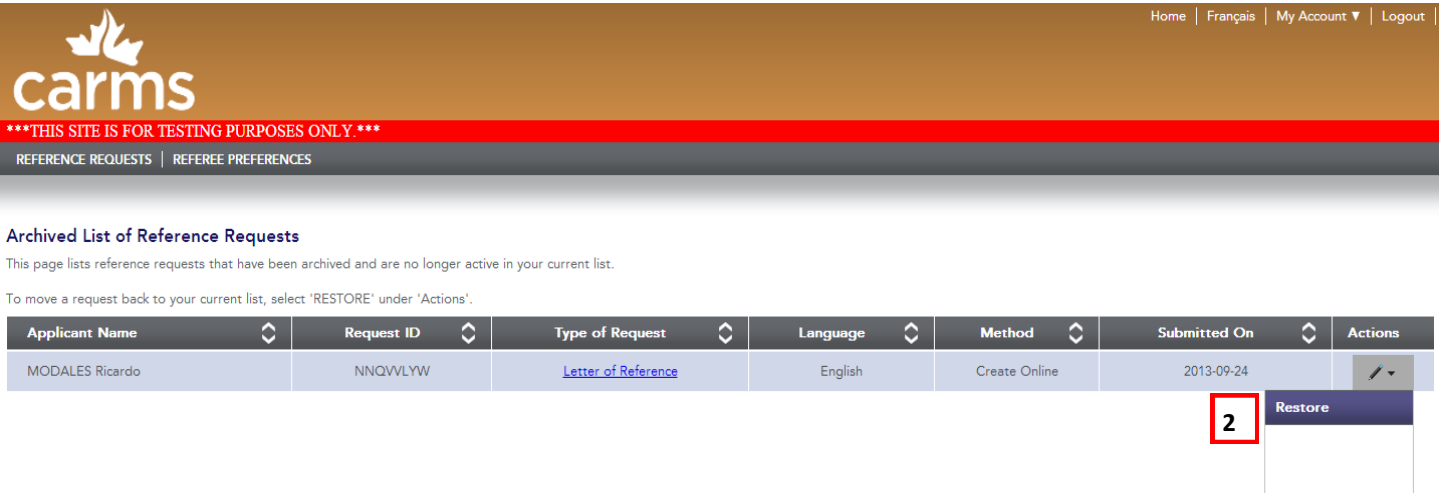


Figure 5.2

2. Restore a reference request by clicking on **Restore**. The document will be restored to your **Reference Request List**.

6-Referee preferences

Modify your letterhead in the **REFEREE PREFERENCES** section.

Note: If you make modifications to your letterhead after you submit a letter, the changes will not be reflected in the submitted letter.

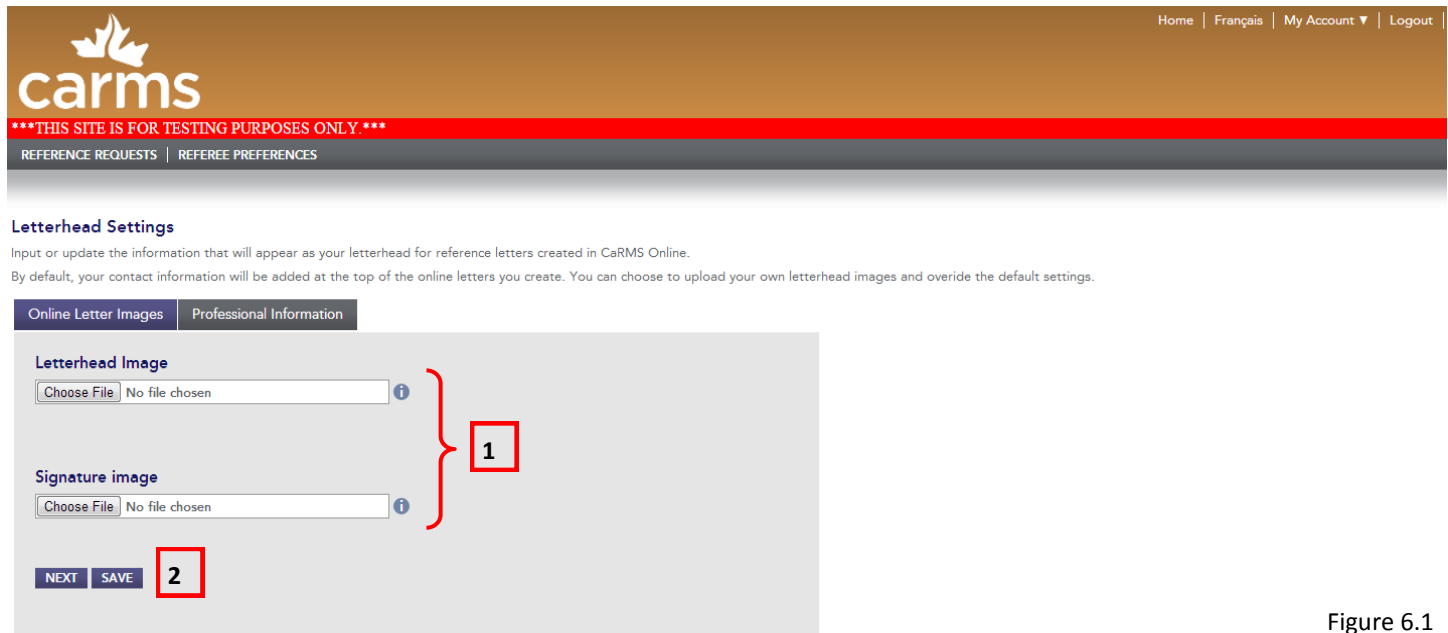


Figure 6.1

1. Click on **Choose File** to upload a letterhead or signature image. File size restrictions apply.
 - Letterhead images must be in JPG format and must not exceed 512 KB.
 - Signature images must be in JPG format and must not exceed 256 KB.
2. Click **SAVE** to continue.

Letterhead Settings

Input or update the information that will appear as your letterhead for reference letters created in CaRMS Online.

By default, your contact information will be added at the top of the online letters you create. You can choose to upload your own letterhead images and override the default settings.

Online Letter Images
Professional Information

* Job title / Academic position: ⓘ

Professional designation(s): ⓘ

Field of Practice:

* Country:

* Medical school affiliation:

* Is the name of your institution/hospital/clinic the same as your medical school affiliation?
☒ Yes ☐ No

Room:

* Street address:

* City:

Province/state/region:

Postal code/zip:

* Primary Phone: Ext.: Type:

Secondary Phone: Ext.: Type:

BACK
SAVE

Figure 6.2

1. Modify your **Professional Information**, if desired. Required fields are marked by a red asterisk (*).

2. Click **SAVE** to continue.