

File Review Information Guide



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File Review

File review is the phase of the match when programs and their file reviewers have access to all applications that have been submitted to their program through CaRMS Online.

Review processes and procedures are at each program's discretion. Typically, programs review applications until they are ready to invite applicants to an interview; however, they may choose to accept and review applications throughout the interview process or right up until the ranking period begins.

Responsibilities during File Review

Each member of your faculty has a role to play in the file review process.

Role	Responsibility
Postgraduate Dean PGME Coordinator Match Coordinator	- Establish the selection criteria for programs (shown in program description). - Develop guidelines and procedures on how to handle applicant information extracted from CaRMS Online.
Program Director Program Administrator	- Review current file reviewer list and - add new file reviewers - modify and remove file reviewer access - send reminders to those who will be reviewing again this year. - Determine the type of access each file reviewer will receive.
File Reviewer	- Review and assess applications in accordance with program guidelines and criteria. - Follow school guidelines on how to handle extracted applicant information from CaRMS Online.

Selection Criteria

Review processes and procedures are at each program's discretion. The Program establishes the selection criteria that file reviewers use to select applicants.

Your program's selection criteria is set out within the [program description's Selection Criteria](#) section which comprises the following information:

- Program goals
- Selection process goals
- File review process
- Elective criteria
- Interview process
- Information gathered outside CaRMS application
- Ranking process

Security of applicant information

You should always treat information about applicants as confidential. Applicants' personal information disclosed to you by CaRMS should only be used for the purpose of selecting candidates and should be kept only as long as it is required for the reasons it was collected. You must have procedures in place to destroy, delete, erase, or convert applicants' personal information into an anonymous form after the completion of the match process.

We encourage you to review documents inline and avoid printing or transferring information whenever possible. As a user of CaRMS services, we recommend that you carefully review [CaRMS policies](#) to familiarize yourself with your rights and responsibilities with regards to CaRMS' security measures.

If you have any questions or concerns about your responsibilities in the security of information, please contact compliance@carms.ca.

Preparing for file review opening

Prior to the [file review period opening](#), programs are required to set up file reviewer access in CaRMS Online. During this period, programs can add, modify or remove file reviewers and create evaluation filters in preparation for file review. The number of individual file reviewers required by your program is at the program director's discretion.

A file reviewer's ability to perform certain functions in CaRMS Online depends on the access level they have been assigned by the program.

File Reviewer Access Levels			
TASK	FULL ACCESS	STANDARD ACCESS	READ ONLY ACCESS
View applications	•	•	•
Export applications	•	•	
Print applications	•	•	•
Add notes	•	•	
Review notes	•	•	
View and access:			
○ Declaration of Indigenous ancestry	•		
○ CaRMS self-identification questionnaire			

For step-by-step instructions and videos on how to add, modify and remove file reviewer access in CaRMS Online, refer to the File Reviewer Access section of the [User Management Information Guide](#).

Reviewing Applications

Although file reviewers are the primary application reviewer, the PGME office and Program Director and administrators also have full access to all applications submitted to their programs.

Masked documents and scores

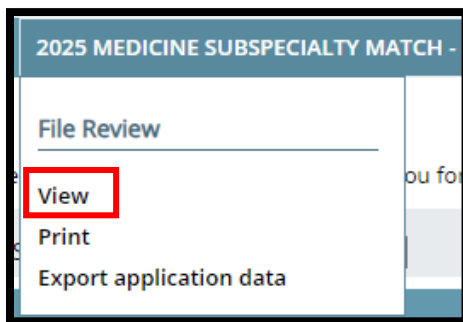
CaRMS strives to provide fair and equitable outcomes for applicants in a match by masking documents with photographs or other identifying information that could lead to unconscious bias.

The following documents and scores will be listed in an applicant's application but will not be able to be viewed until they are unmasked at the opening of the interview period:

- Citizenship documents
- Applicant photos
- Family Medicine Professional Choices (FMProC)
- Language proficiency tests containing a photo of the applicant, namely:
 - Canadian English Language Proficiency Index Program (CELPIP) – General
 - IELTS Academic
 - Occupational English Test (OET) Medicine
 - TOEFL

How to view applications

1. Log into [CaRMS Online](#). Under the match menu and **File Review**, click **View**.



2. A list of all your programs will appear. If you are file reviewer, you will see a list of the program(s) you have been assigned access to. Click on a program to view applications for that program.
3. On the left-hand side of the screen, you will be presented with a list of all applicants who applied to the program. Click on an applicant's name to open their application.
4. Click on the section names in blue to view the different sections of the application.

[View Entire Application](#)
[View Application Data Only](#)
[View Documents Only](#)
[View Summary](#)

[PREVIOUS APPLICANT](#)
[NEXT APPLICANT](#)

Summary
 Medical Education & Practice
 Non-Medical Education
 Examinations
 Medical Licensure & Declaration
 Scholarly Activities
 Additional Information
 Personal Information
Documents

Photographs, citizenship, TOEFL, IELTS, OET, and CELPIP documents will not be available for review until September 1, 2024. Citizenship, IELTS, TOEFL, OET, and CELPIP documents will only be available to the PGME office. No citizenship documents will be available if the applicant's legal status has been verified.

Search:

Type	Document	Submitted Date	Issues
Certificates and Diplomas	Internship Training Certificate	06/28/2024 16:06:53	Report Issues
Certificates and Diplomas	Medical School Diploma	06/28/2024 16:06:53	Report Issues
Examinations	MCCQE Part I - Statement of Results	06/28/2024 16:06:53	Report Issues
Extra Documents	Custom Résumé / CV	06/28/2024 16:06:53	Report Issues
Extra Documents	Declaration of Indigenous Ancestry	06/28/2024 16:06:53	Report Issues
Extra Documents	FAIMER / World Directory of Medical Schools	06/28/2024 16:06:53	Report Issues
Medical Student Performance Record	Medical Student Performance Record	06/28/2024 16:06:53	Report Issues
Reference documents	Family Medicine structured reference letter	06/28/2024 16:06:53	Report Issues
Reference documents	Letter of reference	06/28/2024 16:06:53	Report Issues
Reference documents	Letter of reference	06/28/2024 16:06:53	Report Issues
Reference documents	Letter of reference	06/28/2024 16:06:53	Report Issues
Transcripts	Medical School Transcript	06/28/2024 16:06:53	Report Issues

5. To generate a printable PDF or view an entire application or individual section of an application, select one of the PDF options.

[View Entire Application](#)
[View Application Data Only](#)
[View Documents Only](#)
[View Summary](#)

NOTE: If applicants assign documents to programs any time after the application deadline, programs do not receive a notification. However, applicants have the ability to add a note to their application notifying the program that a new/updated document has been submitted.

How to view an applicant's examination and Situational Judgement Tests

Examination (i.e. NAC Examination, MCCQE Part I) and situational judgement tests (i.e. Casper) are located in the **EXAMINATIONS** section of an applicant's application.

Summary
 Medical Education & Practice
 Non-Medical Education
Examinations

Medical Council of Canada Examinations (no entry)
 Language Proficiency Examinations (no entry)
 Situational Judgement Tests (no entry)
 United States Medical Licensing Examination (no entry)
 Certification Examinations (1 record(s))

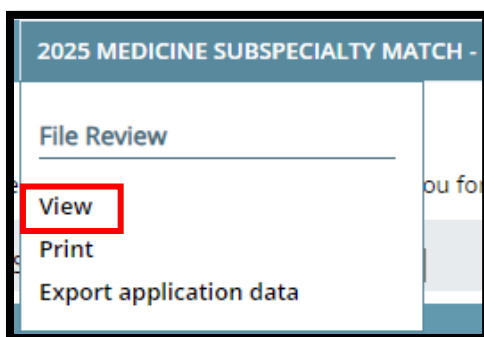
Examination and assessment scores can also be exported as a data element via the **File review - Export application data** section.



How to use filters in an application

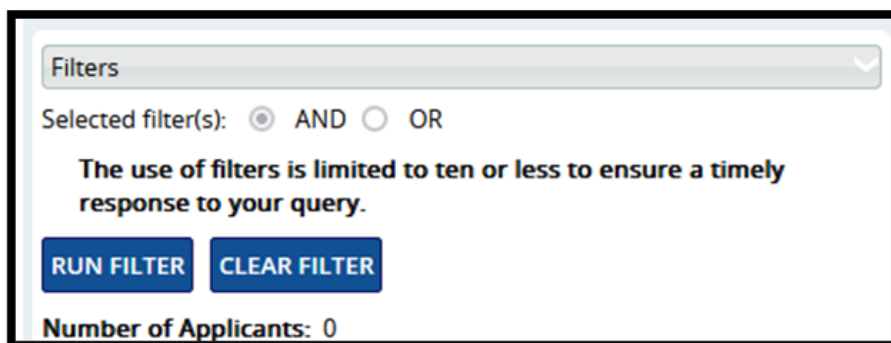
When reviewing applications, you have the option to use filters to refine the list of applicants.

1. Log into [CaRMS Online](#). Under the match menu and **File Review**, click **View**.



2. A list of all your programs will appear. If you are a file reviewer, your list of programs will only show you the programs which you have been assigned access. Click on a program to view applications for that program.

The filters tool is located on the left-hand side of your screen when you open a program.

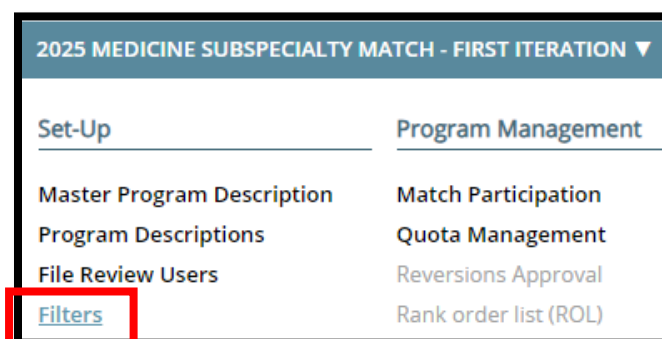


3. Select **Filters** to open the drop down of the [available filters](#). Selecting more than one filter will allow you to select the **OR** option when running the filters.
4. Select **RUN FILTER** to use the selected filter(s) and view the applicants who fit the criteria for the selected filter(s).

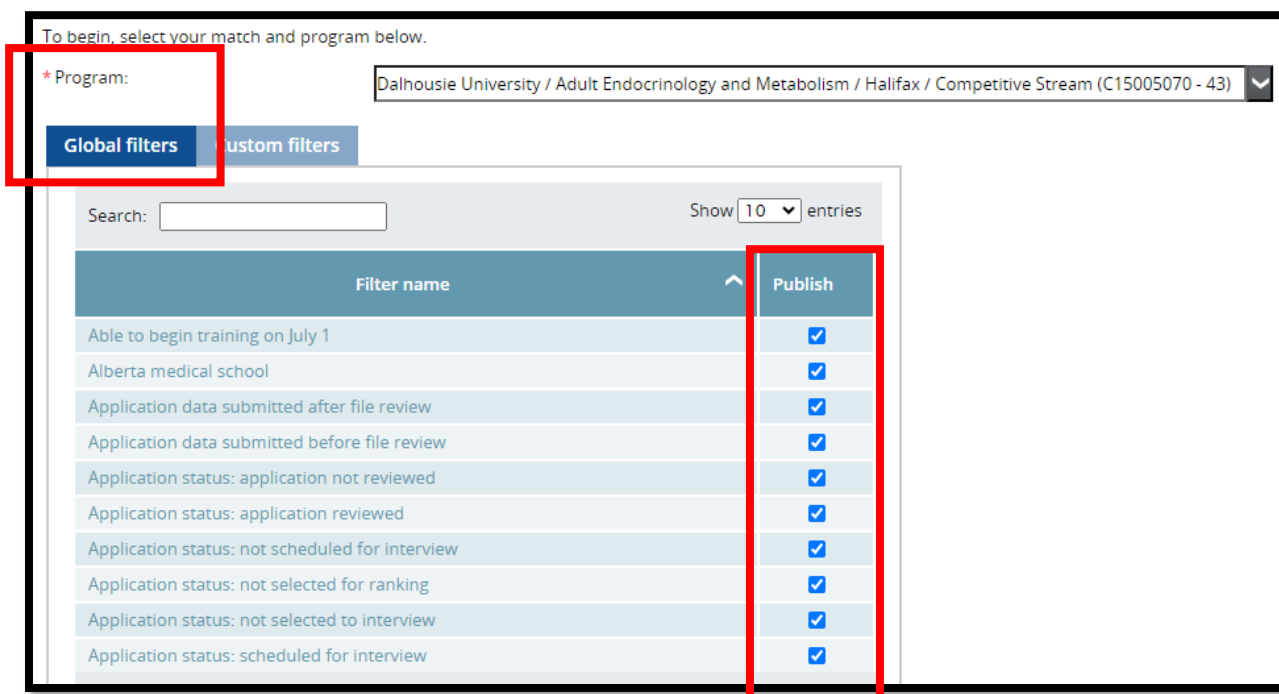
How to view global filters

[Global filters](#) are CaRMS-created filters accessible to all file review users.

1. Log into [CaRMS Online](#). Under the match menu and **Set-Up**, select **Filters**.



2. Choose the program for which you would like to view the global filters for and choose **Global Filters**.

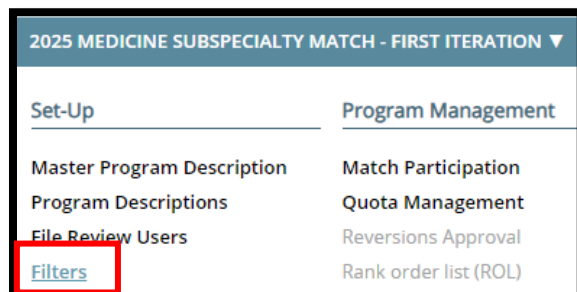


3. A list of all global filters available to that program will be listed. To remove a filter from your program's filter list, uncheck the box in the **Publish** column.

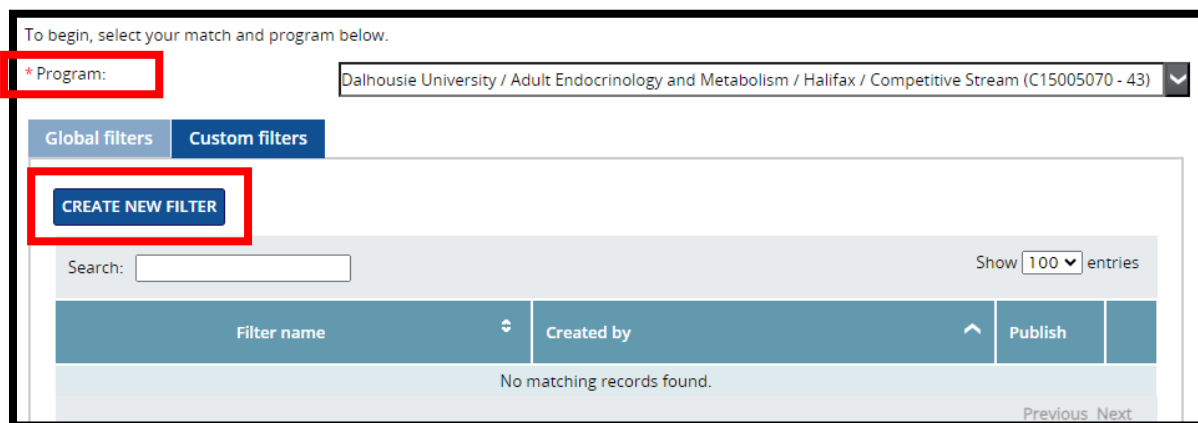
How to create custom filters

The filters page is where the PGME office, program directors and program administrators can create and manage their program's filter list. File reviewers **do not** have access to or the ability to create filters.

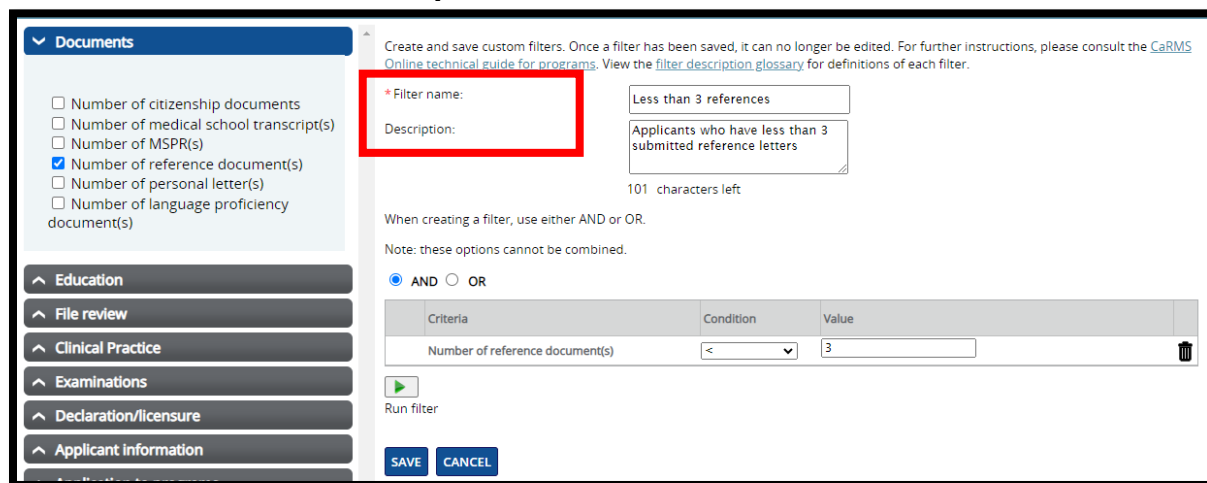
1. Log into [CaRMS Online](#). Under the match menu and **Set-Up**, select **Filters**.



2. Choose the program for which you would like to create the custom filter and then click **CREATE NEW FILTER**.



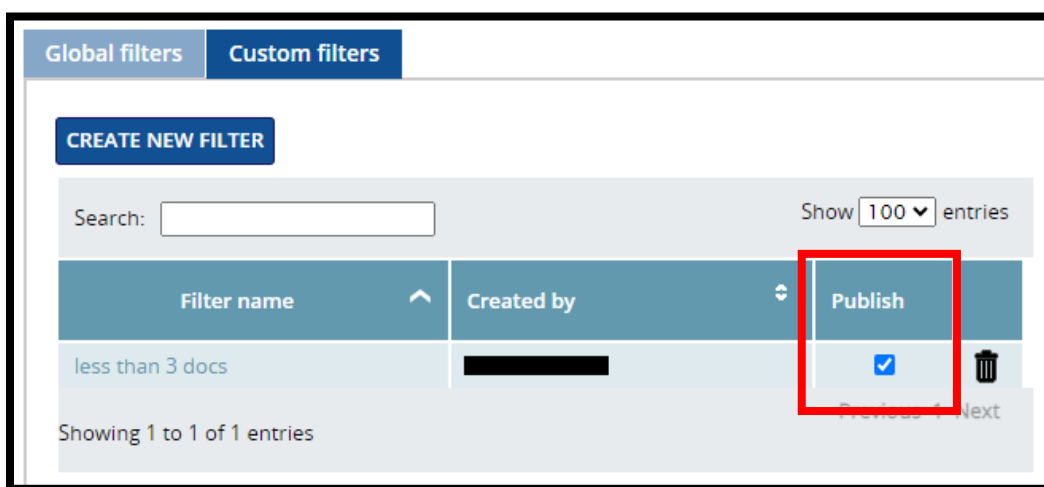
3. Enter a **Filter name** and **Description**.



4. Select the Criteria from the menu selections on the left. Enter a Condition from the drop-down menu and **Value**. Test the filter by clicking on the green play arrow. A **red x** will display if the filter is incomplete.

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.

5. Click **SAVE** to add the filter to your list of custom filters or **CANCEL** to cancel.
6. Check the box under Publish to add the filter to your program's filter list. Click on the trash can icon to delete the custom filter.

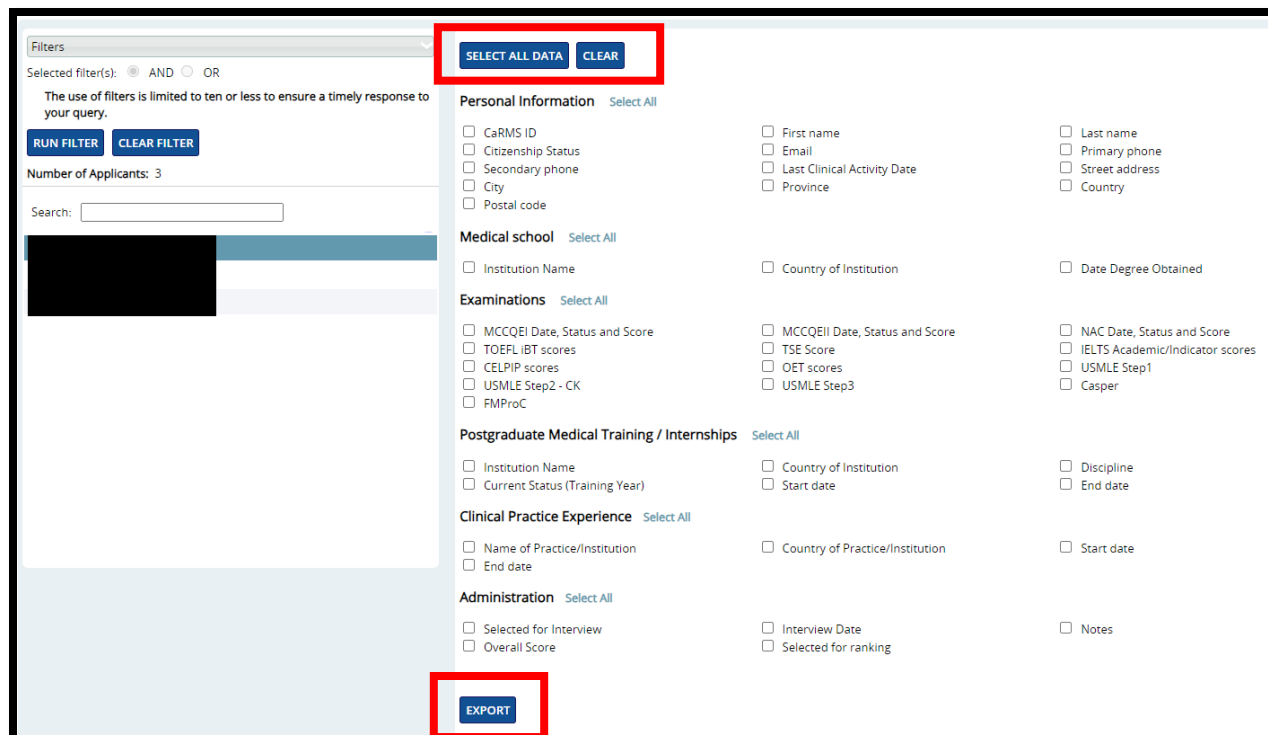


How to export applicant data

1. Log into [CaRMS Online](#). Under the match menu and **File Review**, click **Export application data**.



2. A list of all your programs will appear. If you are file reviewer, your list of programs will only show you the programs you have been assigned access. Click on the program for which you wish to export data.



3. Select the data you wish to print. Click **SELECT ALL DATA** to include all elements or check individual boxes to select certain elements. Select **CLEAR** to start over.
4. Once you have made your selections, click **EXPORT** to export the data into a downloaded Excel file.

How to export Family Medicine and Orthopedic Surgery summary reports (applicable only in R-1 Main Residency Match)

Family Medicine and Orthopedic Surgery programs in the R-1 Main Residency match use an inline standardized structured reference letter. Because the reference is an inline form, programs can extract data in the form of a data summary report.

The Family Medicine Structured Reference Letter Summary report (FMSRL) and Orthopedic Surgery Structured Reference Letter (OSSRL) Summary Report are found under the match menu and **Reports**.

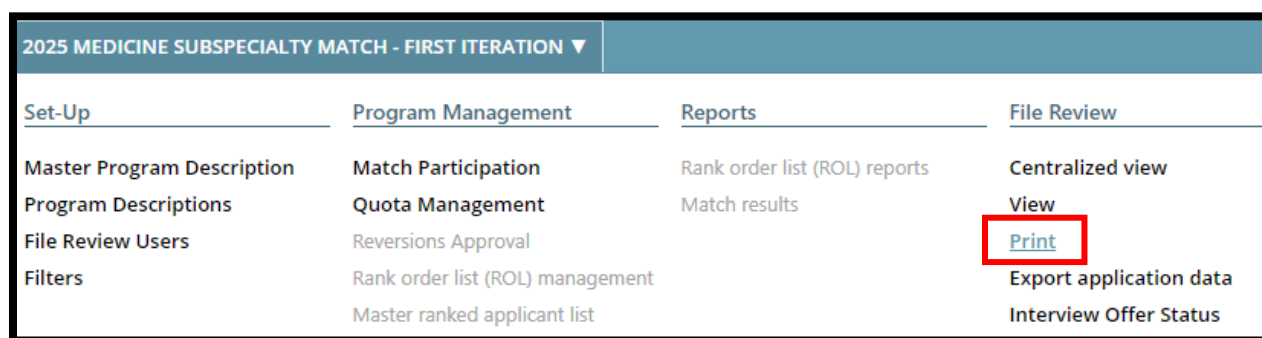
2025 R-1 MAIN RESIDENCY MATCH - FIRST ITERATION ▼		FILE TRANSFER ▼
Set-Up	Program Management	Reports
Master Program Description	Match Participation	Rank order list (ROL) reports
Program Descriptions	Quota Management	Match results
File Review Users	Reversions Approval	FMSRL Summary report
Filters	Rank order list (ROL) management	OSSRL Summary report
	Master ranked applicant list	

1. Click on the summary report you wish to open.
2. A list of your programs will appear. Click on the program for which you wish to export data.
3. Click on **DOWNLOAD REPORT** to download the data into an Excel file.

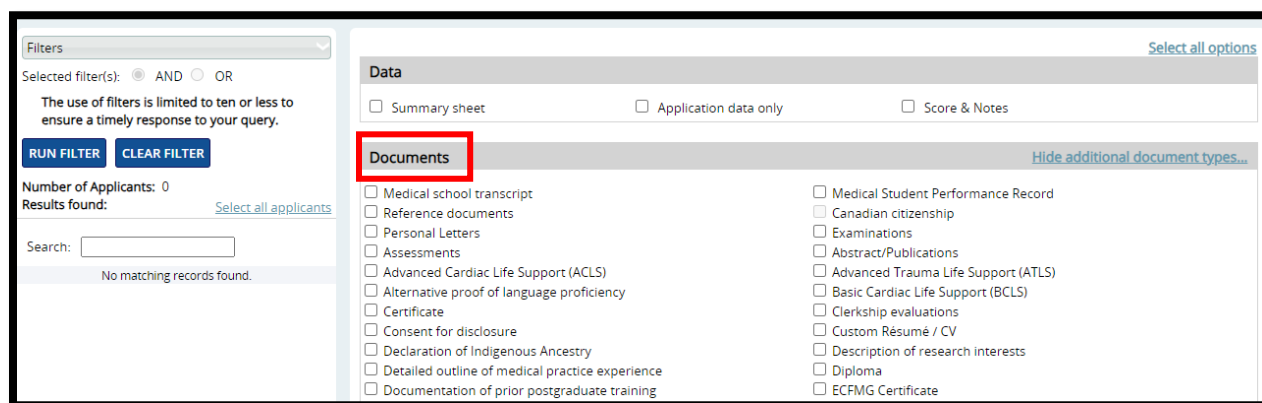
How to download applicants' photos when they become available

To ensure fair and equitable outcomes for all applicants, photos are masked during file review and unmasked near the start of the interview period. Once available, programs can download applicant photos.

1. Log into [CaRMS Online](#). Under the match menu, go to **File Review > Print**.



2. A list of all your programs in the match will appear. Click on the program for which you wish to print the photos.
3. Select applicants from the list on the left side of the screen by checking the box to the left of their name. You can also select all applicants at once by clicking the **Select all applicant** link which is located above the **Search**.
4. Select the **Photo** option under **Documents**.



To reduce the number of applicants in your list, you can apply filters. Apply filters by selecting the **Filter** bar on the left side of the page. Select a filter from the drop-down menu, then click **RUN FILTER**.

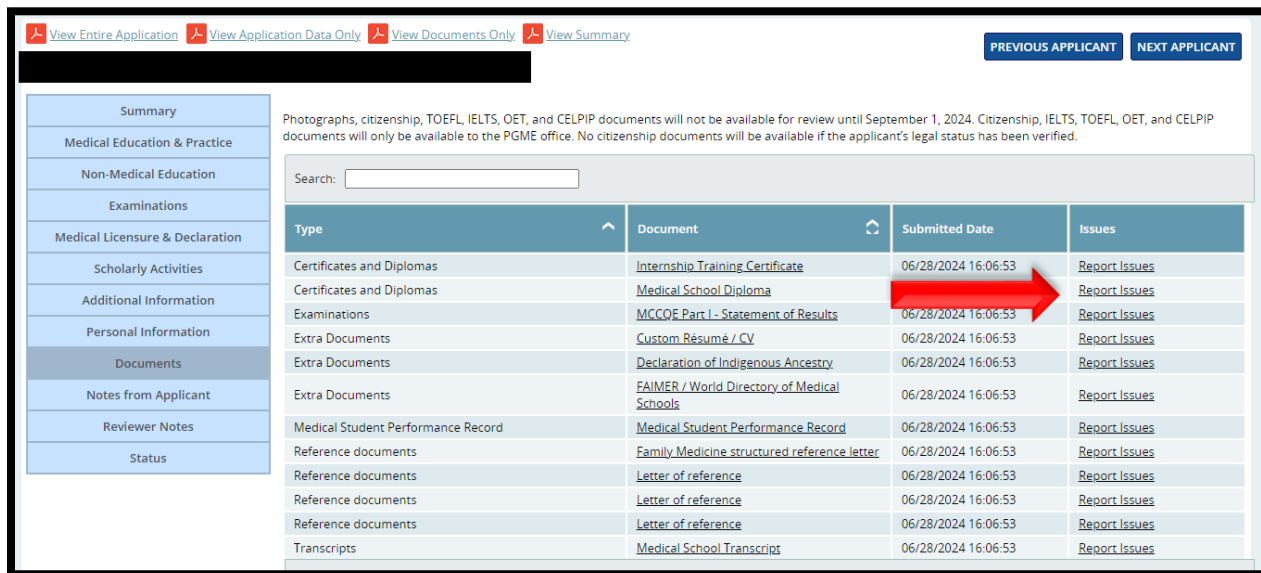
- Click **DOWNLOAD PRINTABLE VERSION** to generate a PDF of your chosen applications.

NOTE: Photos can also be downloaded from the **File Review > View** section, if you wish to download them individually for each applicant.

How to report an issue with a document

When reviewing an application, you can notify CaRMS of a potential issue with an application document by clicking the **Report Issues** link located in the row of the specific document.

Do not email CaRMS to report an issue with a document.



The screenshot shows the CaRMS application review interface. At the top, there are navigation links: [View Entire Application](#), [View Application Data Only](#), [View Documents Only](#), and [View Summary](#). On the right, there are buttons for [PREVIOUS APPLICANT](#) and [NEXT APPLICANT](#). On the left, there is a sidebar menu with categories: Summary, Medical Education & Practice, Non-Medical Education, Examinations, Medical Licensure & Declaration, Scholarly Activities, Additional Information, Personal Information, Documents (highlighted), Notes from Applicant, Reviewer Notes, and Status. The main content area displays a table of documents. A search bar is located above the table. The table has columns: Type, Document, Submitted Date, and Issues. A red arrow points to the 'Report Issues' link in the 'Issues' column for the 'Medical School Diploma' document.

Type	Document	Submitted Date	Issues
Certificates and Diplomas	Internship Training Certificate	06/28/2024 16:06:53	Report Issues
Certificates and Diplomas	Medical School Diploma	06/28/2024 16:06:53	Report Issues
Examinations	MCCQE Part I - Statement of Results	06/28/2024 16:06:53	Report Issues
Extra Documents	Custom Résumé / CV	06/28/2024 16:06:53	Report Issues
Extra Documents	Declaration of Indigenous Ancestry	06/28/2024 16:06:53	Report Issues
Extra Documents	FAIMER / World Directory of Medical Schools	06/28/2024 16:06:53	Report Issues
Medical Student Performance Record	Medical Student Performance Record	06/28/2024 16:06:53	Report Issues
Reference documents	Family Medicine structured reference letter	06/28/2024 16:06:53	Report Issues
Reference documents	Letter of reference	06/28/2024 16:06:53	Report Issues
Reference documents	Letter of reference	06/28/2024 16:06:53	Report Issues
Reference documents	Letter of reference	06/28/2024 16:06:53	Report Issues
Transcripts	Medical School Transcript	06/28/2024 16:06:53	Report Issues

The issue you report is sent to CaRMS for investigation. The user that flagged the issue will be contacted when the issue is resolved or if any further clarification is required.

How to print applications

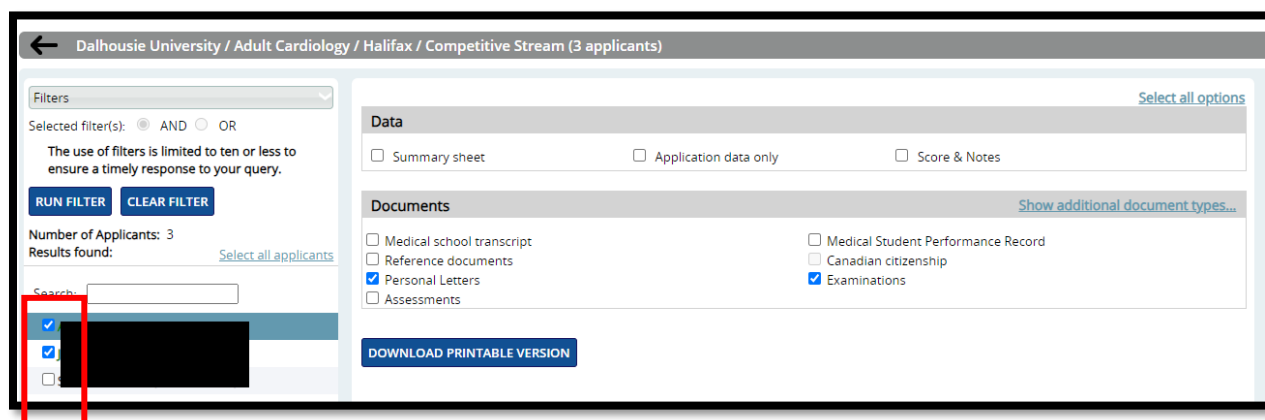
While it is possible to print applicant lists and other information from our online system, we do not encourage it. In fact, the system has been built in such a way that printing is not necessary – all functions can be performed directly within the system.

However, it is ultimately your program's responsibility to develop guidelines and procedures on how to handle applicant information extracted from CaRMS Online. If you have any questions or concerns about your responsibilities in the security of information, please contact compliance@carms.ca.

1. Log into [CaRMS Online](#). Under the match menu and **File Review**, click **Print**.



2. A list of all your programs will appear.
3. Click on the program for which you wish to print applications.
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**. Click **Select all options** to select all elements or check individual boxes to select certain elements.
6. Once all your selections have been made, click **DOWNLOAD PRINTABLE VERSION** to generate a PDF of your chosen applications.

If you have chosen more than three (3) applications:

1. Insert a name for the batch of applications in the **Batch Name** field. Click **GENERATE BATCH**. Your request will go into a queue for download.
2. Return to this page to check the status of your request by clicking on **Check Your Requests** at the top of the screen. When your batch of applications is ready, click the download icon in the Action column.

Note: generated batches will be available for download for seven days, after which they will be removed.

3. Apply filters by selecting the filters section on the left side of the page. Select a filter from the drop-down menu. Click **RUN FILTER**.

Frequently asked questions

- [As a program director or administrator, what should I be aware of when considering applications from international medical graduates \(IMGs\)?](#)
- [What should a program do if no applicants have applied to their program?](#)
- [Will the program\(s\) get a notification if a document is assigned after File Review?](#)
- [Why can't I view the applicant's citizenship or photo?](#)
- [How do I interpret NAC scores from different scales?](#)

Additional resources

Need additional support? Connect with us through the following methods:

- Check out our self-serve Help Center for:
 - [File Reviewers](#)
 - [Program directors and administrators](#)
 - [Postgraduate medical education offices](#)
- Send us an email at communication@carms.ca
- Call us at 1 (877) 227-6742
- Live chat is available from within CaRMS Online during regular business hours.