

User Management Information Guide

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What is CaRMS Online?

CaRMS Online is the platform that is used by the postgraduate medical education offices (PGME Offices) and their designated program users to administer and facilitate residency applications. In this platform, the PGME Office will also create, modify, and manage program user access.

Roles and Responsibilities

Permissions in CaRMS Online are determined by the role you are in the platform.

- The PGME Office is made up of the Postgraduate Dean, Postgraduate Manager, and Match Coordinator.
- Program users are made up of the Program Director and Program Administrator.

Role in CaRMS Online	CaRMS Online User Management Permission
Postgraduate Dean PGME Coordinator	Ability to add, modify and delete any program user access: ▪ Match Coordinator ▪ Program Director ▪ Program Administrator ▪ File Reviewer
Program Director	Ability to add, modify and delete the following program user access: ▪ Program Administrator ▪ File Reviewer
Program Administrator	Ability to add, modify and delete the following program user access: ▪ File Reviewer
Match Coordinator	Ability to add, modify and delete the following program user access: ▪ File Reviewer

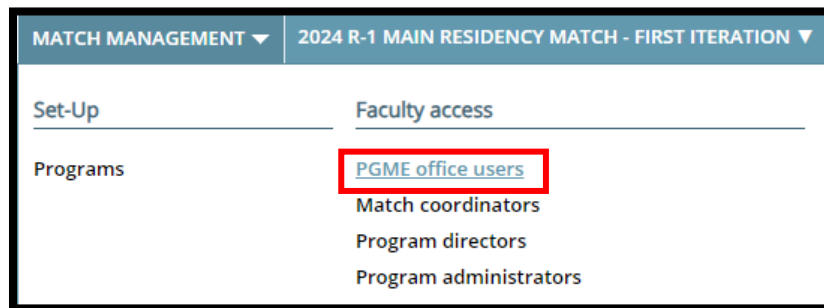
Postgraduate Dean and PGME Coordinator Access

Changes to a Postgraduate Dean or PGME Coordinator's access can only be made by the PGME Office.

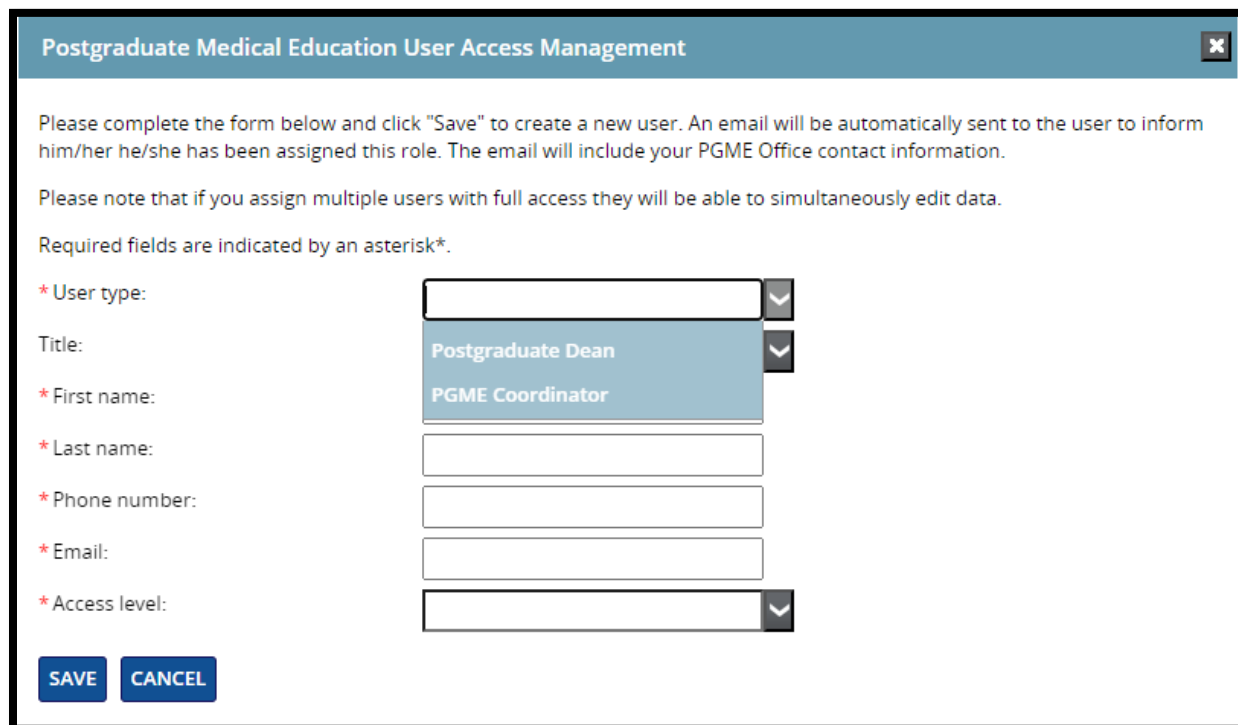
Adding PGME access

VIDEO: [Adding PGME access](#)

1. Log into [CaRMS Online](#). Under **MATCH MANAGEMENT** select **PGME office users**.



2. A list of all users with access to CaRMS Online for your school will be displayed. Click on the plus **+** icon and complete the required fields.



- Under the **User type** drop down menu, choose the appropriate role for the new user.
 - Under the **Access level** drop down menu choose the appropriate access for the user. (Read Only/Read Write). Read Write allows the user to perform all postgraduate office functions.
3. Click **SAVE**.

NOTE: If the user already has a CaRMS Online account, the following message will appear "User account already exists for this email, are you sure you want to give the user new permissions?" Click **CONFIRM** to proceed.

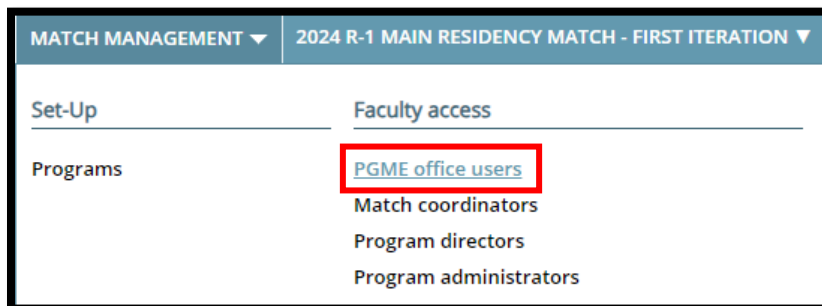


The user will receive an automated email from CaRMS advising them that they have been added as a postgraduate user in CaRMS Online.

Modifying PGME access

VIDEO: [Modifying PGME access](#)

1. Log into [CaRMS Online](#). Under **MATCH MANAGEMENT** select **PGME office users**.



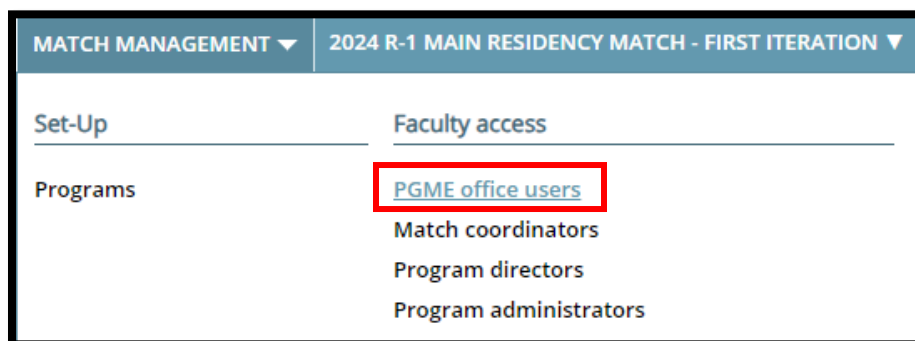
2. A list of all users with access to CaRMS Online for your school will be displayed. Find the PGME user you want to modify and click the pencil  icon in the Actions column.
3. Update the **User type** or **Access level** as required and click **SAVE**.
NOTE: Only the user themselves can update their phone number and email.

The user will receive an automated email from CaRMS advising them that they have been added as a postgraduate user in CaRMS Online.

Deleting PGME access

VIDEO: [Deleting PGME access](#)

1. Log into [CaRMS Online](#). Under **MATCH MANAGEMENT** select **PGME office users**.



2. A list of all users with access to CaRMS Online for your school will be displayed. Find the PGME user you want to delete and click the trash can  icon in the Actions column.
3. The following message will appear *"Are you sure you want to remove this user?"* Click **CONFIRM** to delete the account.

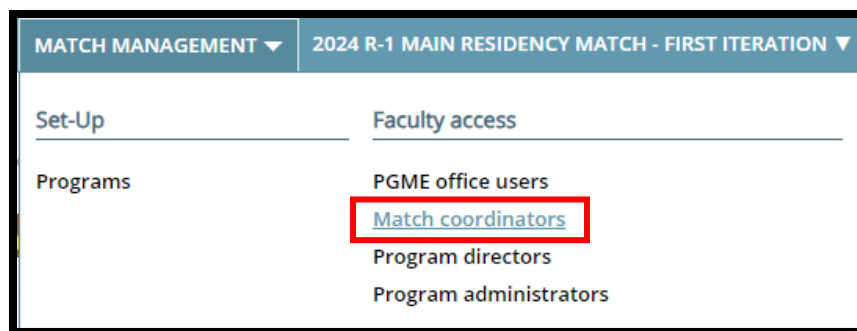
Match Coordinator Access

Changes to a Match Coordinator's access can only be made by the postgraduate office (PGME Office).

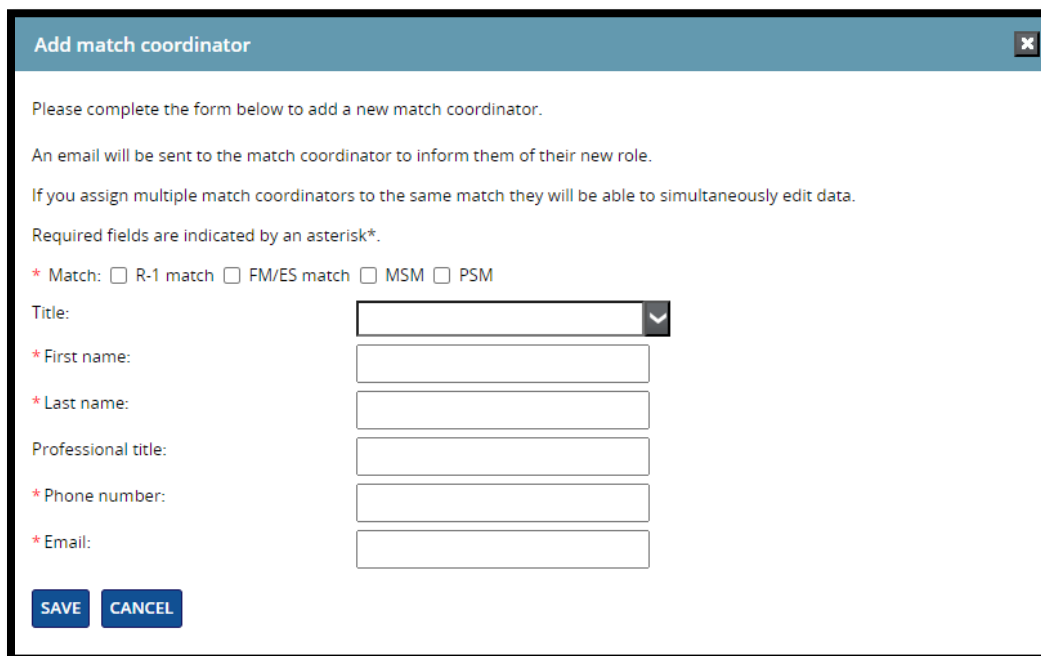
Adding a Match Coordinator's match access

VIDEO: [Adding a Match Coordinator's match access](#)

1. Log into [CaRMS Online](#). Under **MATCH MANAGEMENT** select **Match coordinators**.



2. A list of all users with access to CaRMS Online for your school will be displayed. Click on the plus **+** icon and complete the required fields.



Add match coordinator

Please complete the form below to add a new match coordinator.

An email will be sent to the match coordinator to inform them of their new role.

If you assign multiple match coordinators to the same match they will be able to simultaneously edit data.

Required fields are indicated by an asterisk*.

* Match: ☐ R-1 match ☐ FM/ES match ☐ MSM ☐ PSM

Title:

* First name:

* Last name:

Professional title:

* Phone number:

* Email:

SAVE **CANCEL**

3. Click **SAVE**.

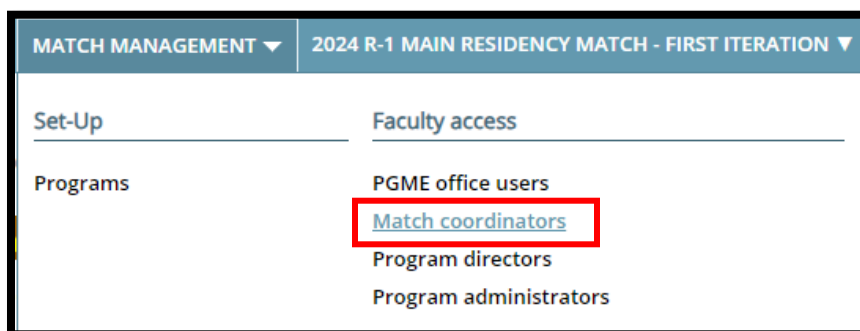
NOTE: If the user already has an online CaRMS account, the following message will appear "An existing user with the email address you specified has been found. Please verify that this is the correct person." Click **CONFIRM** to proceed.

The user will receive an automated email from CaRMS advising them that they have been added as a Match Coordinator in CaRMS Online.

Modifying a Match Coordinator's match access

VIDEO: [Modifying a Match Coordinator's match access](#)

1. Log into [CaRMS Online](#). Under **MATCH MANAGEMENT** select **Match coordinators**.



MATCH MANAGEMENT ▼ **2024 R-1 MAIN RESIDENCY MATCH - FIRST ITERATION** ▼

Set-Up **Faculty access**

Programs PGME office users

Match coordinators

Program directors

Program administrators

2. A list of all users with access to CaRMS Online for your school will be displayed. Find the Match Coordinator you want to modify and click the pencil  icon in the Actions column.
3. Update the selected match as required and click **SAVE**. Note that only the user themselves can update their phone number and email.

Update match coordinator access

You may change the match(es) this user has access to.

Required fields are indicated by an asterisk*.

* Match: ☐ R-1 match ☐ FM/ES match ☒ MSM ☐ PSM

SAVE

CANCEL

The user will receive an automated email from CaRMS advising them that their Match Coordinator access has been modified.

Deleting a Match Coordinator's match access

VIDEO: [Deleting a Match Coordinator's match access](#)

1. Log into [CaRMS Online](#). Under **MATCH MANAGEMENT** select **Match coordinators**.

MATCH MANAGEMENT ▼

2024 R-1 MAIN RESIDENCY MATCH - FIRST ITERATION ▼

Set-Up

Faculty access

Programs

PGME office users

Match coordinators

Program directors

Program administrators

2. A list of all match coordinators with access to CaRMS Online for your school will be displayed. Find the Match Coordinator you want to delete and click the trash can  icon in the Actions column.
3. Click **CONFIRM** to delete the account.

The user will receive an automated email from CaRMS advising them that they have been removed as a Match Coordinator for a specified match.

Program Director Access

When CaRMS creates a program for your school in CaRMS Online, the name and email of the Program Director is included. Once the program is set up, the PGME Office is then able to edit/replace the individual set up as the Program Director, should they need to.

Adding a second Program Director user account

CaRMS Online will only allow you to add one Program Director per discipline. If you have more than one Program Director for a discipline, please email operations@carms.ca to request that the additional Program Director be added.

Modifying a Program Director's access

Changes to a Program Director's access can only be made by the Postgraduate office (PGME Office) in their CaRMS Online account.

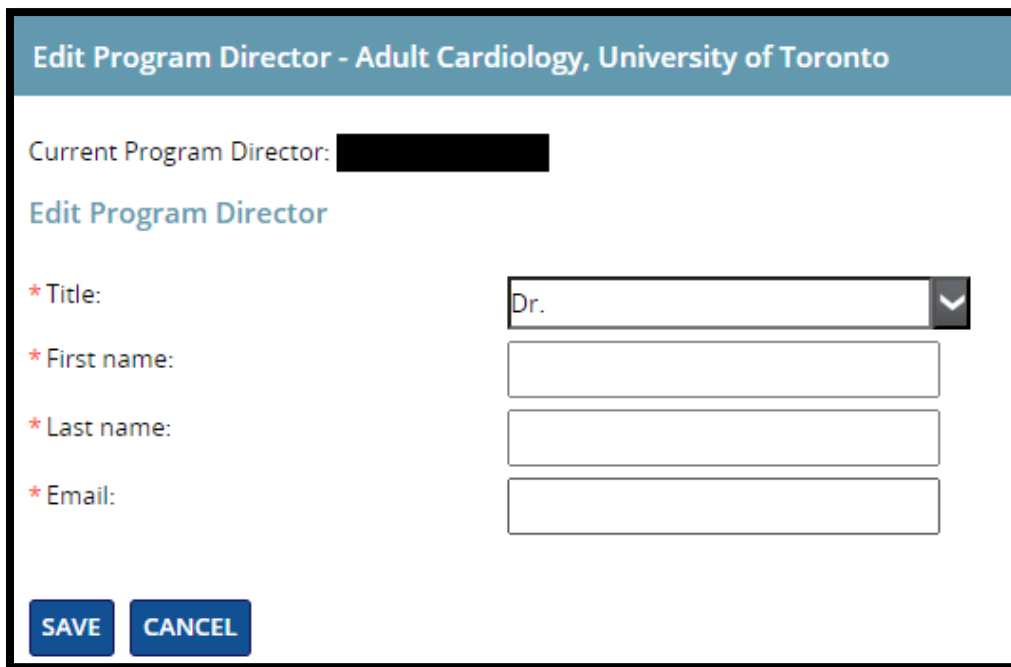
VIDEO: [Modifying a Program Director's access](#)

1. Log into [CaRMS Online](#). Under **MATCH MANAGEMENT** select **Program Directors**.



2. A list of all Program Directors with access to CaRMS Online for your school will be displayed. Select the Match in the drop-down menu.
3. Find the Program Director you wish to update and click the pencil  icon in the Actions column.

4. Enter the new Program Director information and click **SAVE**.



If the user does not have an existing CaRMS account, you will be prompted to click **Invite**. If the user already has an online CaRMS account, the following message will appear “*An existing user with the email address you specified has been found. Please verify that this is the correct person.*” Click **CONFIRM** to proceed.

The user will receive an automated email from CaRMS advising them that they have been designated as a Program Director for the specified program.

Once the Program Director has registered their account, their status will change from **Pending** to **Active** and an envelope  icon will no longer be visible.

To send a reminder to the Program Director click the envelope  icon.

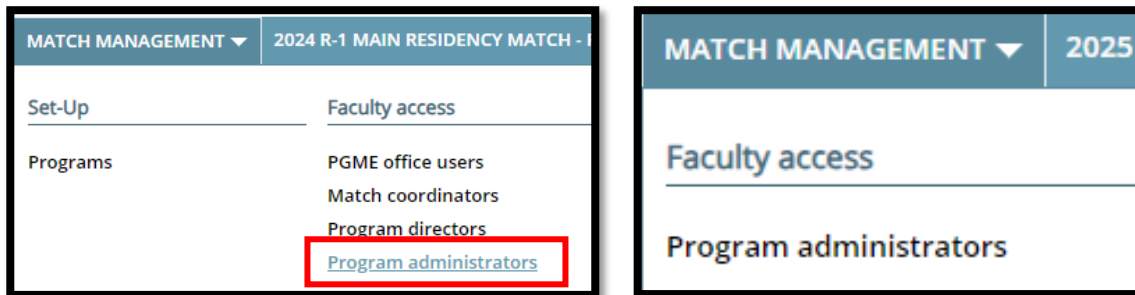
Program Administrator Access

Changes to a Program Administrator’s access can be made by the corresponding Program Director or Postgraduate office (PGME Office) in their CaRMS Online account.

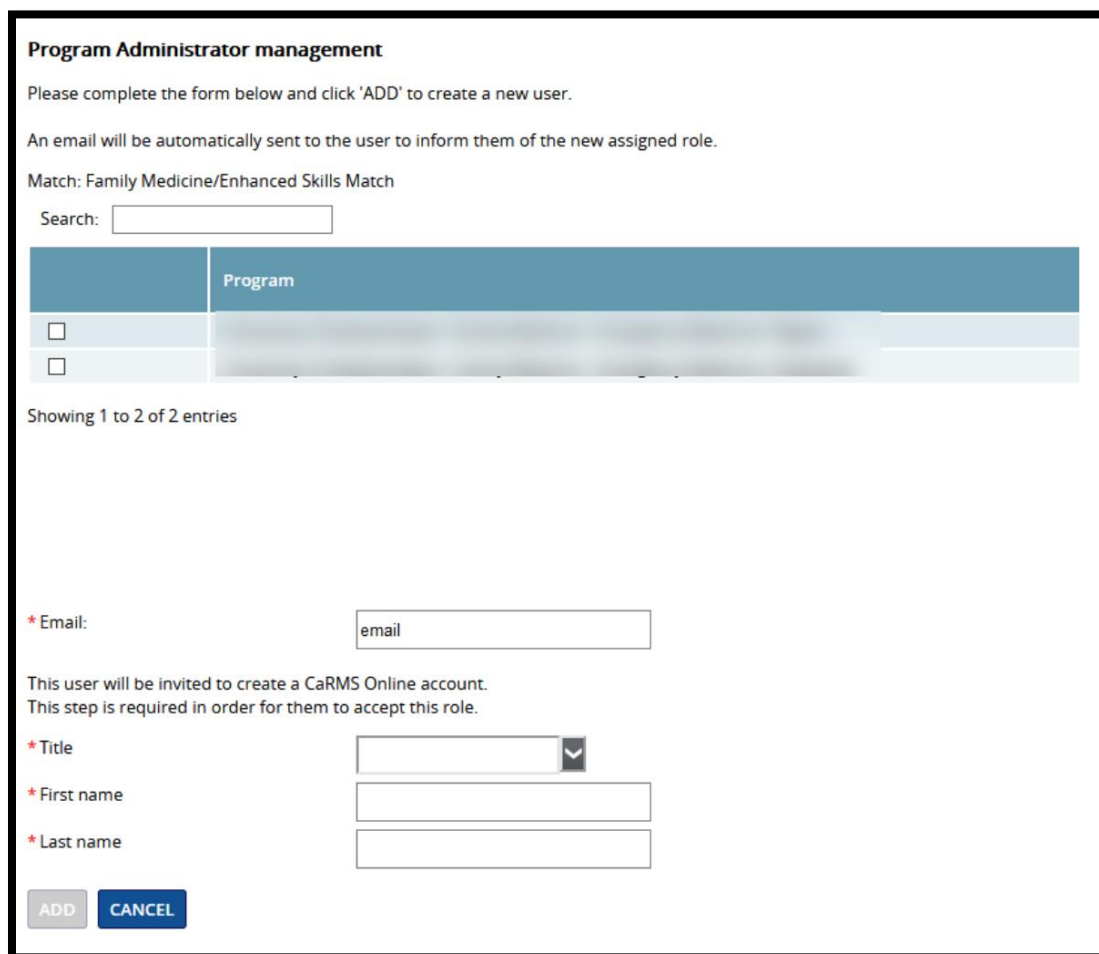
Adding a Program Administrator’s access

VIDEO: [Adding a Program Administrator’s access](#)

1. Log into [CaRMS Online](#). Under **MATCH MANAGEMENT** select **Program Administrators**. Your view of the Match Management menu will vary depending on the role you have in CaRMS Online.



2. A list of all Program Administrators with access to CaRMS Online for your school will be displayed. Select the relevant Match in the drop-down menu and click the plus **+** icon.
3. Select the program(s) you wish to assign to the Program Administrator and enter their email and name. Click **ADD**.



Program Administrator management

Please complete the form below and click 'ADD' to create a new user.

An email will be automatically sent to the user to inform them of the new assigned role.

Match: Family Medicine/Enhanced Skills Match

Search:

	Program
☐	[Blurred]
☐	[Blurred]

Showing 1 to 2 of 2 entries

* Email:

This user will be invited to create a CaRMS Online account.
This step is required in order for them to accept this role.

* Title:

* First name:

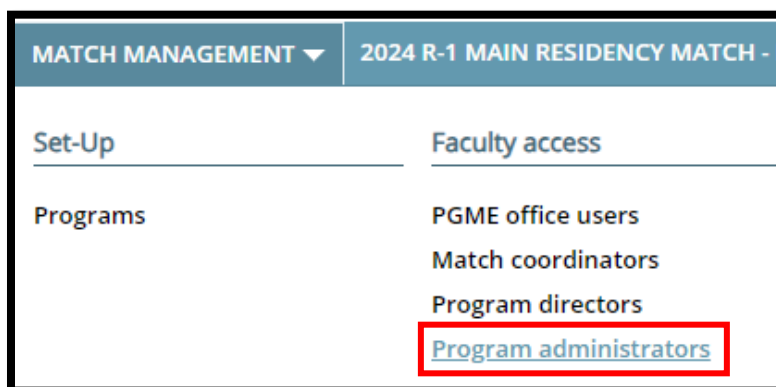
* Last name:

The user will receive an automated email from CaRMS advising them that they have been designated as a Program Administrator for the specified program(s).

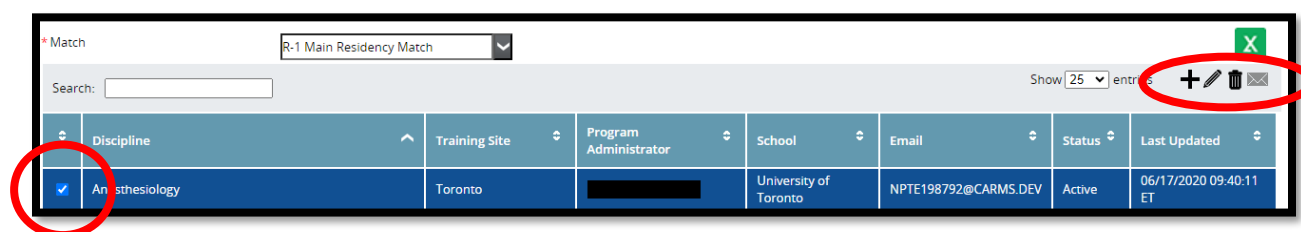
Modifying a Program Administrator's access

VIDEO: [Modifying a Program Administrator's access](#)

1. Log into [CaRMS Online](#). Under **MATCH MANAGEMENT** select **Program Administrators**.



2. A list of all Program Administrators for the disciplines at your school will be displayed. To replace an existing Program Administrator, select the discipline you want to update by clicking on the checkbox in the first column.



3. Click the pencil icon and enter the new user's email address when prompted.
4. Click **REPLACE**. The discipline will now reflect the new Program Administrator's name in the Program Administrator column and the status will appear as **Pending** in the status column. Once the user accesses the platform, their status will change to **Active**.

The user will receive an automated email from CaRMS advising them that they have been designated as a Program Administrator for the specified program.

Deleting a Program Administrator's access

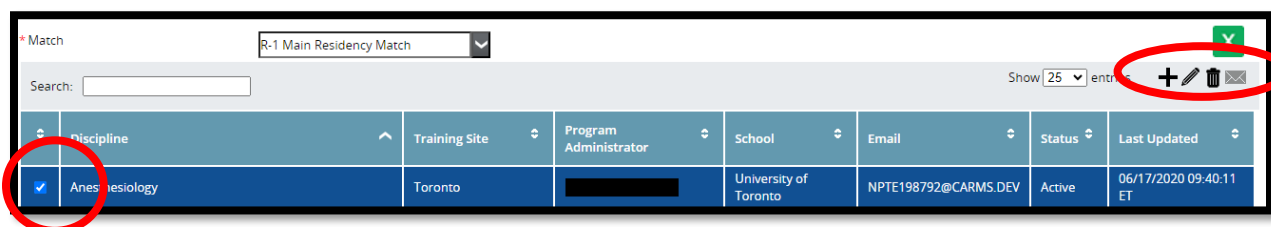
VIDEO: [Deleting a Program Administrator's access](#)

You are only able to delete a Program Administrator's access if there's already an existing second Program Administrator for the program. A program must have one Program Administrator assigned to it.

1. Log into [CaRMS Online](#). Under **MATCH MANAGEMENT** select **Program Administrators**.



2. A list of all Program Administrators for the disciplines at your school will be displayed. Select the discipline you want to update by clicking on the checkbox.



3. Click the trash can  icon and click **CONFIRM** to finalize the action. The user will receive an automatic email from CaRMS advising that they have been removed as a Program Administrator for the program.

File Reviewer Access

Adding a file reviewer's access

VIDEO: [Adding a file reviewer's access](#)

1. Log into [CaRMS Online](#). Under the match menu go to **Set-Up - File Review Users**.

2025 R-1 MAIN RESIDENCY MATCH - FIRST ITERATION ▼

[Set-Up](#)

[Reports](#)

[Program Descriptions](#)

[File Review Users](#)

[Filters](#)

[Match results](#)

- A list of all file reviewers at your school will be displayed. Filter file review users by choosing the appropriate selection from the **Program** and **Quota stream** drop-down menus.

*

Program

All

▼

*

Quota stream

All

▼

- Click **ADD FILE REVIEWER** to add a new file reviewer.

Add file reviewer ✕

2025 Medicine Subspecialty Match - first iteration

To add a new file reviewer enter the required information below.

There is no need to create file reviewer accounts for program directors. Program directors will be given file reviewer access when CaRMS Online opens for file review.

Select the access level for the user by checking the box in either the 'Full access' or 'Read only access' column.

Full access users can view, export and print applications. Full access users can also access the 'Reviewer notes' section to include additional information about the applicant. Information provided in the 'Reviewer notes' section is also available to program directors and/or program setup users.

Read only access users can view applications, with the exception of the 'Reviewer Notes' section, and print applications.

* Email:

* Title:

▼

* First name:

* Last name:

Professional Title:

Discipline	Location	Quota stream	Full access	Standard access	Read only access
Adult Respiriology	Vancouver	Competitive Stream	☐	☐	☐
General Internal Medicine	Vancouver	Competitive Stream	☐	☐	☐

- Complete the required fields and select their access level.

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			

NOTE: You do not have to create file reviewer accounts for Program Directors. Program Directors are automatically given file review access when CaRMS Online opens for file review.

5. Once the form is complete, click **ADD FILE REVIEWER**.

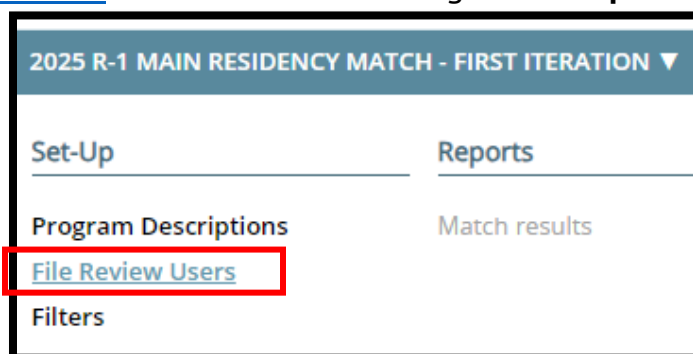
The user will receive an automated email from CaRMS advising them that they have been added as a file reviewer for the specified program(s). Their user status will show as **Pending** until they access the platform at which point the user status will change to **Active**.

If a file reviewer has not set up their account in CaRMS online, you can send them a reminder to do so by clicking the message  icon beside their name.

Modifying a file reviewer's access

VIDEO: [Modifying a file reviewer's access](#)

1. Log into [CaRMS Online](#). Under the match menu go to **Set-Up - File Review Users**.



2. A list of all file reviewers at your school will be displayed. Filter file review users by choosing the appropriate selection from the **Program** and **Quota stream** drop-down menus.

* Program

All

* Quota stream

All

3. Find the file reviewer user you want to modify and click the pencil  icon on the line they appear in.
4. Update their access level for each discipline they are assigned to and click **SAVE**.

Discipline	Location	Quota stream	Full access	Standard access	Read only access
Anesthesiology	Toronto	CMG Stream	☐	☐	☒
Anesthesiology	Toronto	IMG Stream	☐	☐	☒

The user will receive an automated email from CaRMS advising them that they have been added as a file reviewer for the specified program(s).

Deleting a file reviewer's access

VIDEO: [Deleting a file reviewer's access](#)

1. Log into [CaRMS Online](#). Under the match menu go to **Set-Up - File Review Users**.

2025 R-1 MAIN RESIDENCY MATCH - FIRST ITERATION ▼

Set-Up

Program Descriptions

File Review Users

Filters

Reports

Match results

2. A list of all file reviewers at your school will be displayed. Filter file review users by choosing the appropriate selection from the **Program** and **Quota stream** drop-down menus.

* Program	All	▼
* Quota stream	All	▼

- Find the file reviewer user you want to modify and click the pencil  icon on the line they appear in.
- Click **DELETE USER** to remove the file review's access from all your programs and **CONFIRM** to delete the account.

Staff changes in PGME Office

If a current Postgraduate Office Coordinator is leaving, they or another Postgraduate Office Coordinator can add a new user. The new user or another Postgraduate Office Coordinator should remove the old user's access. If the previous coordinator did not create the new user access, please contact communication@carms.ca.

How to update an account with a generic email

If your program uses a generic email, for example cardiology@carms.ca, and you are looking to change the user for the account using the same email address, the PGME Office must email operations@carms.ca so that CaRMS can update the account.

Additional resources

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

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