

Welcome to the CaRMS Online Referee Portal User Manual

The CaRMS Online Referee Portal provides a secure environment for referees to create or upload reference letters for applicants. This system saves time, eliminates mailing expenses and reduces paper use.

Please note that supported browsers for the CaRMS Online Referee Portal are:

- [Google Chrome](#) (recommended)
- [Mozilla Firefox 14.0](#)
- [Internet Explorer 9](#)

If you are not using one of these browsers, unexpected errors may occur. We apologize for any inconvenience, and recommend sending your reference letter to CaRMS by mail if you are unable to upgrade to a recommended browser.

If you have not yet created an account for the 2013 R-1 Main Residency Match, proceed to this link to begin registration*:

<https://phx.e-carms.ca/phoenix-web/referee/register>

**If you have received a reference request e-mail from CaRMS, a link to the login page can be found in the body of the e-mail. Using this link will add the applicant's request to your account automatically. Skip to step 7 for instructions on submitting the letter online.*

**If you had an online referee account for previous CaRMS matches, you will need to register for a new one for the 2013 R-1 Main Residency Match.*

Steps 1 – 5 below will walk you through creating a CaRMS Online Referee account. If you have already created an account for the 2013 R-1 Main Residency Match, please skip to step 7.

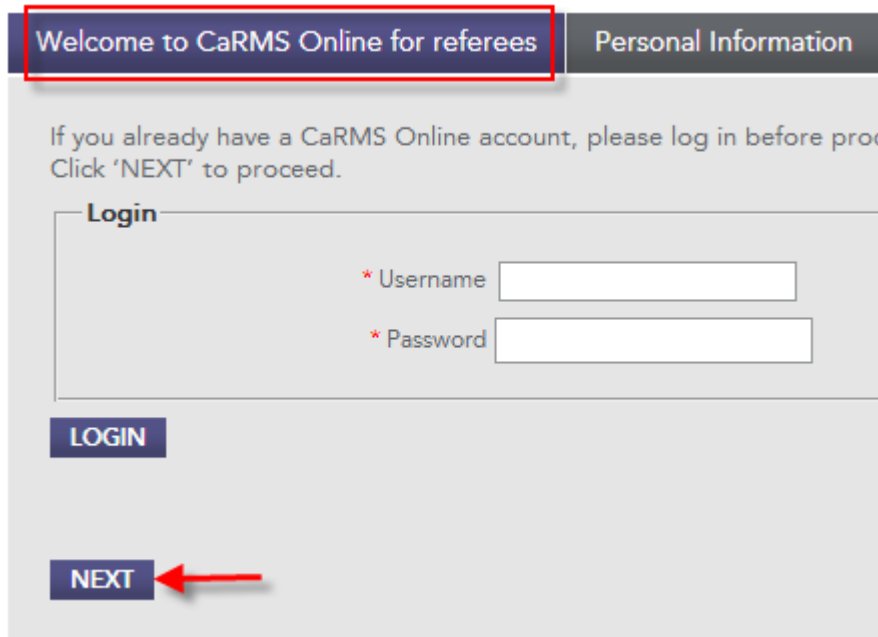
1. Welcome to CaRMS Online

Clicking the registration link will bring you to the login screen displayed below.

If you already have an account*, enter your username and password in the fields shown below and skip to step 7.

**If you had an online referee account for previous CaRMS matches, you will need to register for a new one for the 2013 R-1 Main Residency Match.*

If you do not yet have an account, ignore the username and password fields and click '**Next**' to proceed.



The screenshot shows a web interface for referees. At the top, there are two tabs: "Welcome to CaRMS Online for referees" (highlighted with a red box) and "Personal Information". Below the tabs, there is a message: "If you already have a CaRMS Online account, please log in before proceeding. Click 'NEXT' to proceed." Underneath this message is a "Login" section with two input fields: "* Username" and "* Password". Below the login fields are two buttons: "LOGIN" and "NEXT". A red arrow points to the "NEXT" button.

2. Personal Information

Please note that fields marked by red asterisks are mandatory. Once you have entered all mandatory information, click 'Next' to proceed to 'Institution Information'.

Welcome to CaRMS Online for referees	Personal Information	Institution Information	CaRMS Account
--------------------------------------	-----------------------------	-------------------------	---------------

This information will be used in the online letter(s) of reference.
NOTE: Edits to your information will not be reflected in any letters that have been previously submitted.
Required fields are indicated by an asterisk (*).

* Salutation: ▾

* First name :

Middle name:

* Last name :

Academic Degree(s): (This will be placed after your name e.g. - Dr.John Smith, M.D)

Field of Practice: ▾

* Email:

* Email Confirmation:

* Primary Phone: Ext.: Type: ▾

Secondary Phone: Ext.: Type: ▾

NEXT ←

3. Institution Information

Please note that fields marked by red asterisks are mandatory. Once you have entered all mandatory information, click 'Next' to proceed to 'CaRMS Account' to create your account.

Welcome to CaRMS Online for referees Personal Information **Institution Information** CaRMS Account

This information will be used in the online letter(s) of reference.
NOTE: Edits to your information will not be reflected in any letters that have been previously submitted.
Required fields are indicated by an asterisk (*).

* Is your Institution the same as your School Affiliation.: Yes No

* Job title / Academic position: *Indicate the closest or equivalent option if your school uses

* Country:

* School Affiliation:

* Other School Affiliation:

Room:

* Street address:

* City:

* Province or state:

* Postal code/zip:

BACK **CANCEL** **NEXT** ←

4. CaRMS Account: Login Information

In this section you will create your user name and password. Please note the industry-standard password requirements below.

User name requirements:

- Must be 6-20 characters long
- Cannot include any special characters (!@#%&*)

Password requirements:

- Must be 8-20 characters long
- Must contain at least one capital letter
- Must contain at least one numeric digit
- Must contain at least one special character (!@#%&*)

Example of an acceptable password: Drjohns2!

Make a note of your username and password and keep the information in a safe place.

You are also asked to create a security question and answer. The system will ask you this if you ever need to reset your password. Make a note of your security answer and keep it in a safe place.

When you have completed these steps, click **'Next'** to proceed to the **'Policy Agreement'** section.

Welcome to CaRMS Online for referees | Personal Information | Institution Information | **CaRMS Account**

To be able to use this service, you must create a CaRMS Online user account.
To proceed, enter the requested information and click "NEXT". Required fields are indicated by an asterisk (*).
This information will be used in the online letter(s) of reference.
NOTE: Edits to your information will not be reflected in any letters that have been previously submitted.
Required fields are indicated by an asterisk (*).

* Create your user name

* New password

* Confirm password

Please enter a security question and answer, for identification purposes. It is recommended you create a question for which the answer is known only to you.

* Security question ▼

* 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

BACK **NEXT** ←

5. Policy Agreement

You will be asked to read and accept a Terms of Use policy agreement. Please read and accept the declaration by clicking the check box. Once this is done, click **'Register'** to complete the account registration process.

Welcome to CaRMS Online for referees	Personal Information	Institution Information	CaRMS Account	<u>Policy Agreement</u>
--------------------------------------	----------------------	-------------------------	---------------	-------------------------

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

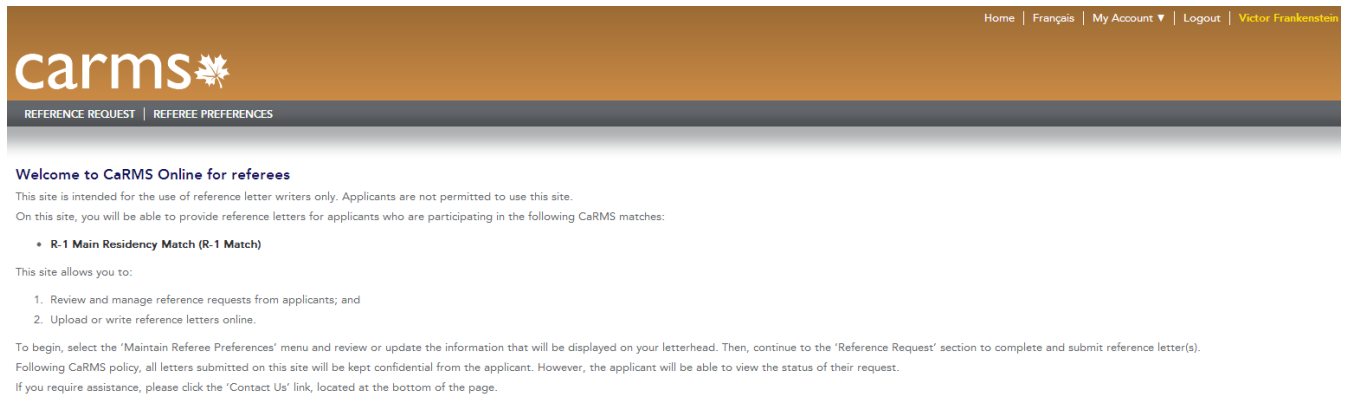
Once your access account has been registered, you will receive a confirmation email and you can complete one or more reference letters electronically.

I acknowledge and agree that my use of CaRMS Online will be in accordance with CaRMS' Terms of Use. I hereby declare that the information I provide is for information purposes. I acknowledge that the letter(s) of reference I will submit are confidential and will NOT be shared with the named individual.

REGISTER **CANCEL**

6. Your Account Home Page

After completing registration and logging in to your account, you will arrive at the following page.



At the top-right of this page, you will find the following menu selections.



Clicking **'Home'** returns you to the main page (shown in the previous screenshot) from anywhere in the application.

Clicking **'Français/English'** allows you to change the language of the entire page.

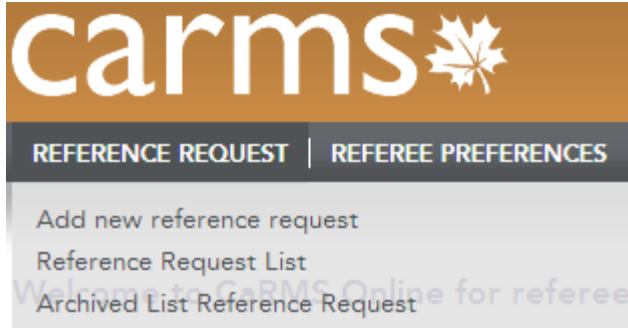
Clicking **'My Account'** allows you to edit the following items:

- User Information : Your Name, Title, Time Zone
- Contact Information: Your e-mail address, phone number, preferred language
- Address Information: Your preferred contact address
- Security Information: Your username, password, security question

Clicking **'Logout'** allows you to logout of the application.

7. Submitting a letter online

To begin the reference letter submission process, hover your cursor over **'Reference Request'** at the top left of your screen. A dropdown menu containing the following options will open. Each of the menu items is explained below.



7.1 Add new reference request

This section enables you to add a reference request entry to your Reference Request List (see 7.2) in three easy steps.

Please note that if you clicked the e-mailed link provided to you by the applicant via CaRMS, the applicant's request will have been added to your Reference Request List automatically and you can skip ahead to 7.2.

Add a New Reference Request

To begin, enter the reference request number and the applicant's CaRMS ID. If an applicant and reference request number is found, please verify the information on the applicant page and click the 'MANAGE REQUEST' button to complete the letter.

Step 1 → Reference Request ID:

* CaRMS ID: - - -

SEARCH ← **Step 2**

Search Result

Medical Professional CaRMS Code: **Svenson, Sven (HJ738KM498)**
Medical school of graduation: **Aruba University of Medicine**
Year of Graduation: **2012**

Reference Request: **LYVGZUMY**
Language: **English**
Reference Details:

Request's Referee: **Dr. Victor Frankenstein**

test

ADD TO REQUEST LIST ← **Step 3**

Step 1: Enter the Reference Request ID and CaRMS ID, both of which can be found at the top of the cover page provided to you by the applicant.

To: Dr. Victor Frankenstein

test
test, Romania

Requested by: Svenson, Sven Test (CaRMS ID: HJ738KM498)

Request ID: LYVGZUMY

Language Requested: English

Reference Details: No Specific Discipline

Step 2: After entering the Reference Request ID and CaRMS ID, click ‘Search’.

If you have entered the correct information, the applicant details will appear in the ‘Search Result’.

Step 3: If the information in the ‘Search Result’ is correct, click ‘Add to Request List’ to add the request to your Reference Request List.

7.2 Reference Request List

This section enables you to submit your reference letter online after adding the entry to your list.

An entry on your list will look like this:

	Reference Request	Type	Name	Match
<input type="checkbox"/>	ACBDEFGH	Letter of Reference	Applicant Name	R-1 Match

To submit a letter, select the appropriate entry by clicking the checkbox on the entry’s left side.

Once the entry is selected, click the “Manage Request” button beneath the list.

	Reference Request	Type	Name
<input checked="" type="checkbox"/>	LYVGZUMY	Letter of Reference	Svenson, Sven

MANAGE REQUEST VIEW DOCUMENT ARCHIVE MY REQUEST DISCARD REQUEST

There are two options for submitting a reference letter through CaRMS Online:

Option 1: Upload letter

To upload a letter, first create your letter offline and convert the document to a PDF file (file size limit of 1.5MB).

Once your PDF file has been created, follow the steps outlined below.

1. Select 'Upload Letter'
2. Choose the PDF file that you wish to upload
3. Save the document
4. View the document to ensure it is properly formatted
5. Submit the document

Manage Request

Letter of Reference	
Reference Request:	ABCDEFGH
Letter Writer:	Dr. John Smith
Requested by:	Applicant Name
Reference Details:	
Language:	English

This reference letter can be uploaded or created online.

Please select which method will be used. **1** Upload Letter Type Letter Online

2 Upload Document

File: No file chosen

3 **4**

Note: When the letter is uploaded, the date will appear to the right of the 'Choose File' text field.

Option 2: Type letter within CaRMS Online

To enter a letter directly into CaRMS Online, select the request from the **'Reference Request List'** page and click the **'Manage Request'** button. Choose the **'Type Letter Online'** option and follow the steps outlined below.

Note: It is recommended that you create your letter in a word processing document and then copy it into this system so that you have a copy of the letter for your records. If you are creating the letter directly in the system, we recommend saving frequently.

1. Type or copy/paste the text into the text box (character limit: 15,000)
2. Save the document. We recommend saving your letter as you go in order to avoid losing any information.
3. Submit the document
4. View the document to ensure it is properly formatted

This reference letter can be uploaded or created online.

Please select which method will be used. Upload Letter **1** Type Letter Online

Type Letter Online

Enter the content of your letter in the following box. The header, date and signature will be added once the letter is created.

You are able to copy/paste your letter of reference directly into text box. Be sure to preview the letter after the copy/paste as some characters (" , ' , - , etc.) may be replaced by other symbols. If this happens, delete the character and replace it to correct the problem. This text box has a limit of 15,000 characters.

Please save your work often. Until the entry is saved, the information is not stored in the system.

2

15000 Characters left

Reference Letter writing section tips::

- Introduction / salutation
- 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
- Other Comments

3**4**

SAVESUBMIT DOCUMENTVIEW DOCUMENT

Once the letter is submitted, the process is complete. The two rightmost columns on your Reference Request List will indicate how and when the letter was submitted (*see below*).

Method	Submitted
Create Online	Submitted on 2012-09-25
Uploaded	Submitted on 2012-09-25

The letter **MUST** be submitted in order for it to be available for use. On your Reference Request List, check the column labeled **'Submitted'**. If the status of a letter is **'Not Submitted'** and the letter is otherwise satisfactory to you, please select the request, click **'Manage Request'** and then **'Submit Document'**.

If you do not wish to complete any given request, select the request from the list, and click **'Discard Request'**. A new window will allow you to enter the reason that you are discarding the request and email this information to the applicant.

7.3 Archived List Reference Request

This page itemizes requests that have been archived and are no longer active in your current list. Archiving a request removes it from your active list.

To move a request back to your active list, select the request and click **'Restore'**.

8. Referee Preferences

This section allows you to edit the information that appears in the letterhead when typing a letter directly into CaRMS Online (see section 7.2).

The data you enter under the **'Personal Information'** and **'Institution information'** tabs will be included in the contact information at the top right of the reference letter.

Maintain Referee Preferences

Instructions	Personal Information	Institution Information	Online Letter Images
<p>The 'Referee Preferences' will be used in the online letter(s) of reference.</p> <ul style="list-style-type: none">• The 'Personal Information' and 'Institution information' will be included in the contact information.• Online Letter Images: <p>You may upload a letterhead image. This will be placed at the top of the page, aligned with the margins of the letter.</p> <p>You may upload a signature image. The signature image will be placed at the bottom of your letter.</p> <p>Click 'NEXT' to review or edit your information.</p> <p>NEXT</p>			

The **'Online Letter Images'** tab allows you to upload letterhead and signature images. However, please note that this is not mandatory.

If you choose, you may upload a letterhead image in **.jpg** format. This image will be placed at the top of the page, aligned with the margins of the letter. If your letterhead contains your contact information, you may choose to not include the default contact information referenced above.

Letterhead Image	
Upload:	<input type="button" value="Choose File"/> No file chosen
Location:	<input type="radio"/> Left <input type="radio"/> Center <input type="radio"/> Right
Contact Information:	Contact information is added at the top of your online letter by default. Please choose one of the following options: <input type="radio"/> Show the default text in addition to the letterhead image. <input type="radio"/> The letterhead image already includes contact information. Do not show the default text.

You may also upload a signature image in **.jpg** format. The signature image will be placed at the bottom of your letter, aligned with the left margin of your letter.

Signature	
Upload:	<input type="button" value="Choose File"/> No file chosen