



Canada Border  
Services Agency

Agence des services  
frontaliers du Canada

# Onboarding to the CARM Client Portal

**November 15, 2022**

Canada 

**CARM** | CBSA  
Revenue

# Today's Agenda

- What is CARM, What is the CARM Client Portal?
- Portal Registration
- Business Registration
- Delegation of Authority
- Next Steps & Additional Resources
- Question & Answer



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# The CARM vision

*Deliver a **globally-leading** customs experience that is client-centric, facilitates legitimate trade, improves compliance and revenue collection, and contributes to securing the borders of Canada.*



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# CARM Phased Approach to Support Adoption

Release 1: **NOW LIVE**

## Basic portal introduction



### **Access**

Available to Importers, Customs Brokers and trade consultants



### **Account Data**

Ability to manage account data and delegate authority to Customs Brokers



### **Payments**

Ability to view statements of account and make electronic payments (pre-authorized debit, credit card, etc.)



### **Self Service**

Tool to help classify goods



### **Rulings**

Ability to request advance rulings



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## Release 2: To Be Announced All CARM functionality



### **Access**

Available to all CBSA clients



### **Enrollment**

Ability register and enroll in CBSA program



### **CAD NEW!**

Ability to submit new commercial account information and ability to make corrections and adjustments



### **Notifications**

Customizable electronic notification options



### **Billing Cycle**

Harmonized billing cycle that aligns payment due dates and provides more time to make interest-free payments



# Introducing the CARM Client Portal

[YouTube Video](#)



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# CARM Client Portal Onboarding

Onboarding process once CARM Client Portal is available with Release 1

*This step will **only** be required if an importer has not previously transacted business with the CBSA.*



## 2. Create Individual User Portal Account

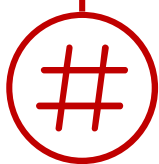
Login to the CARM Client Portal using one of the following login credentials and create your individual user account:

- [GCKey](#)
- [Sign-In Partner](#)



## 4. Grant Access to Employees/Representatives

Navigate to the Delegation of Authority on the portal and select the appropriate type for each employee or representative wish to delegate access to. The employee/representative must have already created an individual user portal account and request access.



## 1. Obtain Business Number and RM

Follow the current process to obtain a **Business Number (BN)** and **RM account** through the Canada Revenue Agency (CRA).



## 3. Link User Account with Business Account

To set up your business account on the portal, you must link your user account to your company's business account in the portal.

**The Business Account Manager (BAM) in your company must complete this process.**



## 5. Conduct Business with CBSA

**You are now ready to conduct business with the CBSA.** You can now view your statements, make payments, and request rulings.



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# Portal Registration



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# CARM Client Portal Home Page

The CARM Client Portal can be first accessed from the [CBSA Website](#). Save the URL to your browser for quick access.

On the Home page, under **Services and information**, you will see the [Log in to the CARM Client Portal](#) link.

Click to access the  
CARM Client Portal  
(CCP)

Government of Canada / Gouvernement du Canada

Search Canada.ca

MENU ▾

[Home](#)

## CARM Client Portal

View public information related to the Commercial Client Portal; Login or register for a portal account.

### Services and information

[Log in to the CARM Client Portal](#)  
Use your credentials to register or login to your portal account.

[Onboarding documentation](#)  
Access documentation about the portal's onboarding process and its functionalities

[List of Licensed customs brokers](#)  
Name and contact information of licensed customs brokers

[CARM Open API Catalog](#)  
CARM APIs published for the purposes of discovery and lifecycle management and for public consumption

[Bulletins](#)  
CARM system information; Program updates; Form specifications; Process updates

### Other resources

- [Log in to the eM](#)
- [Log in to the Tr Portal](#)



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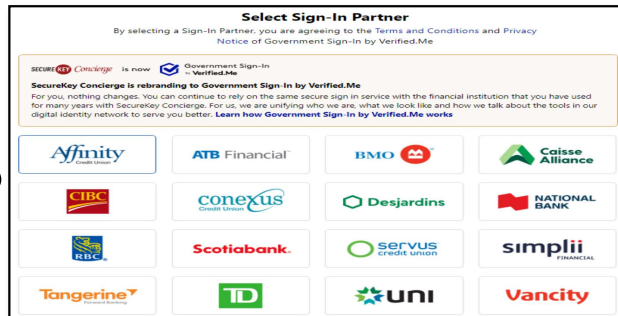
# Initial Setup

The CARM Client Portal can be first accessed from the [CBSA Website](#). All individuals and businesses go through the initial setup prior to using the CARM Client Portal's main functionalities.

To log in to the CARM Client Portal, you must select either **Sign-In Partners** or **GCKey**.

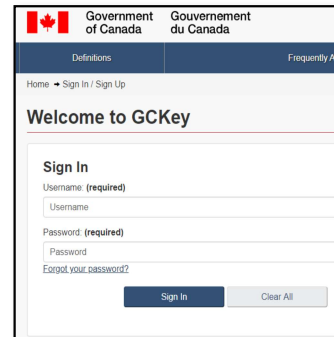
## Sign-In Partners

The **Sign-In Partner** allows you to log in through the web portals of an existing set of financial services.



## GCKey

The **GCKey** allows you to reuse existing credentials used on other Government of Canada portals or create a new one.



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# Login Through Sign-In Partners


All individuals and businesses who use the Sign-In Partners option to login into the portal must have an account with the selected partner.

On selecting a Sign-In Partner, you will be directed to the Partner's sign-in page where you need to follow the steps provided for logging in.

## Sign-In Partners

### Select Sign-In Partner

By selecting a Sign-In Partner, you are agreeing to the [Terms and Conditions](#) and [Privacy Notice](#) of Government Sign-In by Verified.Me

SECURE KEY Concierge is now  Government Sign-In by Verified.Me

#### SecureKey Concierge is rebranding to Government Sign-In by Verified.Me

For you, nothing changes. You can continue to rely on the same secure sign in service with the financial institution that you have used for many years with SecureKey Concierge. For us, we are unifying who we are, what we look like and how we talk about the tools in our digital identity network to serve you better. [Learn how Government Sign-In by Verified.Me works](#)

Affinity  
Credit Union

ATB Financial™

BMO 

Caisse  
Alliance

CIBC

coastcapital.

conexus  
Credit Union

Desjardins

NATIONAL  
BANK

RBC

Scotiabank.

servus  
credit union

simplii  
FINANCIAL

Tangerine  
Forward Banking

TD

uni

Vancity

test 1

test 2

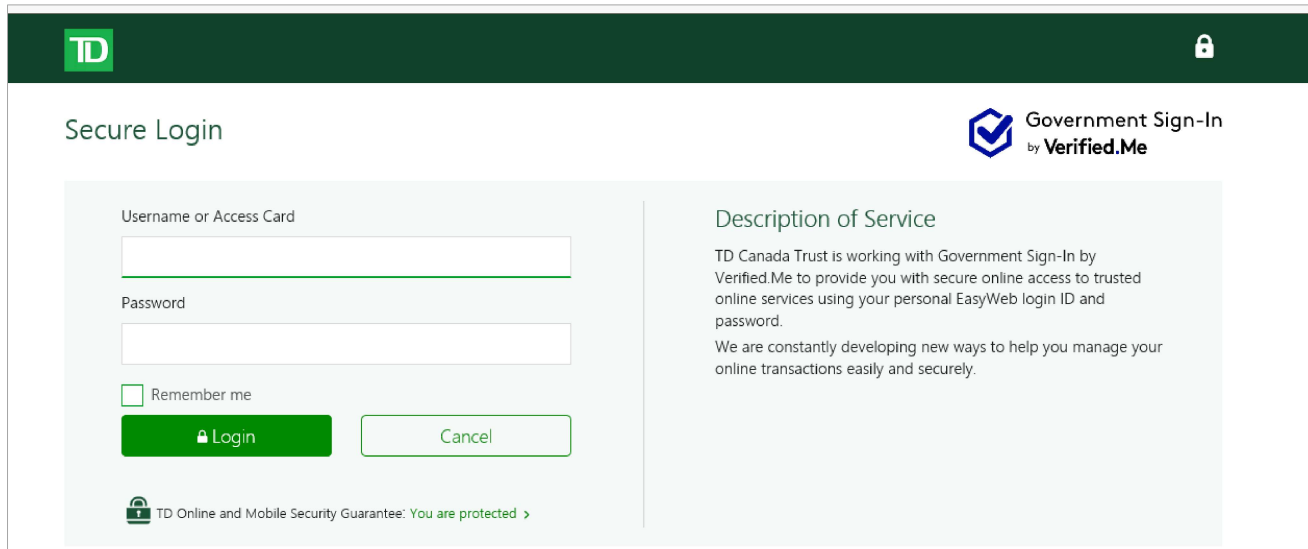
test 3



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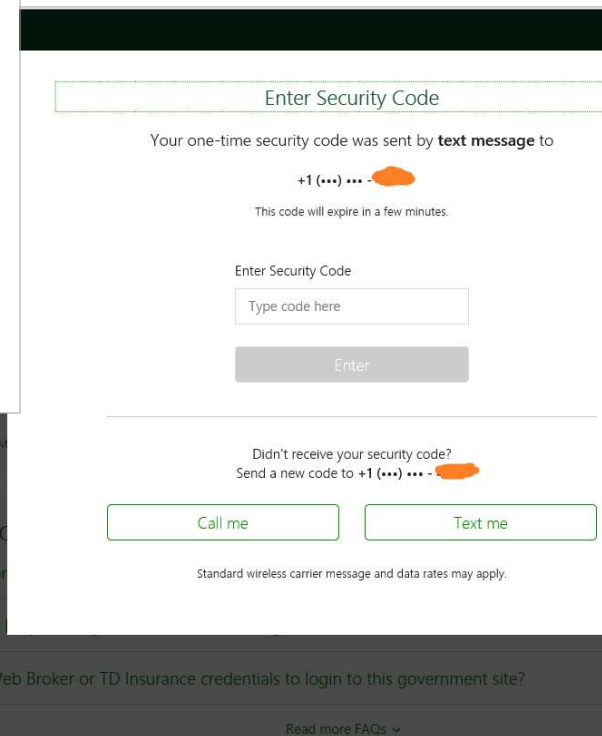
# Login Through Sign-In Partners

1. Login via your bank.



The image shows the TD Secure Login page for Government Sign-In by Verified.Me. The page has a dark green header with the TD logo and a lock icon. Below the header, the title "Secure Login" is on the left, and the "Government Sign-In by Verified.Me" logo is on the right. The main content area is divided into two columns. The left column contains a "Username or Access Card" input field, a "Password" input field, a "Remember me" checkbox, a green "Login" button with a lock icon, and a "Cancel" button. Below these is a "TD Online and Mobile Security Guarantee: You are protected" link. The right column is titled "Description of Service" and contains text explaining that TD Canada Trust is working with Government Sign-In by Verified.Me to provide secure online access to trusted online services using a personal EasyWeb login ID and password. It also mentions that they are constantly developing new ways to help manage online transactions easily and securely.

2. You may then be presented with your bank's own security screen (if applicable).



The image shows a TD security code screen. At the top, it says "Enter Security Code". Below this, it states "Your one-time security code was sent by text message to" followed by a phone number "+1 (\*\*\*).\*\*\*.\*\*\*" with the last three digits obscured by an orange circle. It then says "This code will expire in a few minutes." Below this is a section titled "Enter Security Code" with a text input field labeled "Type code here" and an "Enter" button. At the bottom, it asks "Didn't receive your security code?" and "Send a new code to +1 (\*\*\*).\*\*\*.\*\*\*" with the last three digits obscured by an orange circle. There are two buttons: "Call me" and "Text me". At the very bottom, it says "Standard wireless carrier message and data rates may apply." and "Read more FAQs" with a dropdown arrow.



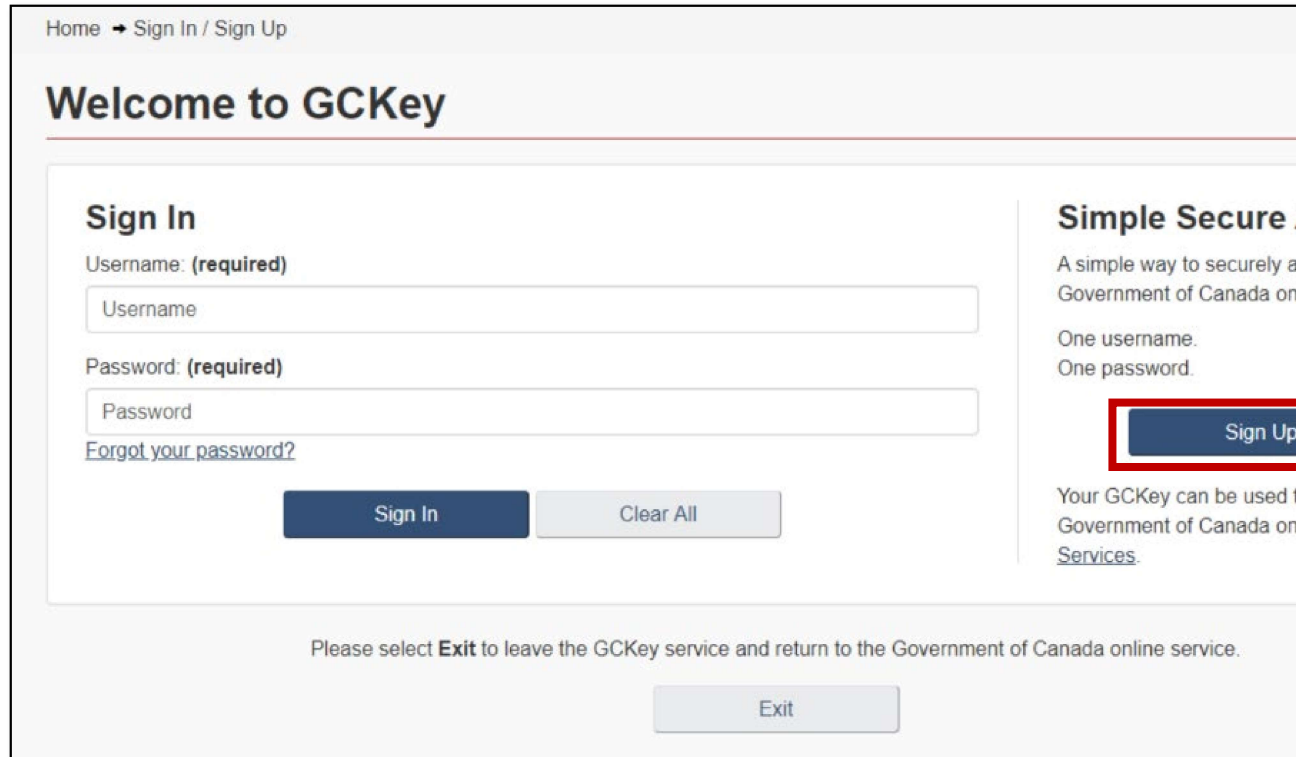


# Create Your GCKey

All individuals and businesses who use the GCKey option to login into the portal must create a GCKey if they do not already have an active GCKey. The following is the process for signing up for a GCKey:

Follow steps to create a GCKey:

1. Click on the **Sign Up** button.
2. Click the **I accept** button to accept the terms and conditions.



Home → Sign In / Sign Up

## Welcome to GCKey

### Sign In

Username: **(required)**

Password: **(required)**

[Forgot your password?](#)

**Sign In** **Clear All**

### Simple Secure

A simple way to securely a Government of Canada on

One username.  
One password.

**Sign Up**

Your GCKey can be used t Government of Canada on

[Services](#)

Please select **Exit** to leave the GCKey service and return to the Government of Canada online service.

**Exit**



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# Create Your GCKey

3. Create your **Username** as per the specifications provided and click the **Continue** button.
4. Create your **Password** as per the specifications provided and click the **Continue** button.

This screenshot shows the 'Create Your Username' step (Step 2 of 4) of the GCKey Sign Up process. The navigation bar at the top includes 'Definitions', 'Frequently Asked Questions (FAQ)', and 'Help'. Below the navigation bar, a breadcrumb trail shows 'Home → GCKey Sign Up Step 2 of 4'. A progress indicator shows four steps: 'Terms and Conditions', 'Username' (highlighted), 'Password', and 'Questions and Answers'. The main heading is 'Create Your Username'. Below it, instructions state: 'Your Username must contain between eight and sixteen characters, no special characters (for example: %, #, @) and may contain up to seven digits. When creating your Username, we recommend that you:'. A list of recommendations follows: 'make your Username easy for you to remember and hard for others to guess;', 'avoid using personal information such as your name, Social Insurance Number (SIN), mailing address or email address;', and 'always keep your Username secure and do not share it with anyone.' To the right, a 'Privacy' section contains the text: 'Please keep your Username secure. For more information on how your privacy is protected, please refer to our [Personal](#)'. At the bottom, there is a text input field for the username, followed by the instruction 'Please select **Continue** to proceed or click **Cancel** to end the Sign Up process.' and three buttons: 'Continue' (highlighted with a red box and a green circle with the number 3), 'Clear All', and 'Cancel'.

This screenshot shows the 'Create Your Password' step (Step 3 of 4) of the GCKey Sign Up process. The navigation bar at the top includes 'Definitions', 'Frequently Asked Questions (FAQ)', and 'Help'. Below the navigation bar, a breadcrumb trail shows 'Home → GCKey Sign Up Step 3 of 4'. A progress indicator shows four steps: 'Terms and Conditions', 'Username', 'Password' (highlighted), and 'Questions and Answers'. The main heading is 'Create Your Password'. Below it, instructions state: 'Your Password must be between eight and sixteen characters, contain at least one upper case letter, one lower case letter and one digit, and must not contain 3 or more consecutive characters from your Username'. Below the instructions, there are two text input fields: 'Create Your Password: (required)' and 'Confirm Your Password: (required)'. Below the input fields, the instruction 'Please select **Continue** to proceed or click **Cancel** to end the Sign Up process.' is displayed. At the bottom, there are three buttons: 'Continue' (highlighted with a red box and a green circle with the number 4), 'Clear All', and 'Cancel'.

# Create Your GCKey

5. Select your preferred **Recovery Questions**.

6. Click the **Continue** button.

You have now successfully created a GCKey.

**Create Your Recovery Questions, Answers and Hints**

Your Recovery Question, Answers and Hints are used to help you if you forget your Password. Please complete all the required fields below to continue the Sign Up process.

**5** Select a Recovery Question: **(required)**

Please select a question...

My Recovery Answer: **(required)**

My Memorable Person: **(required)**

My Memorable Person Hint:

My Memorable Date (YYYY-MM-DD): **(required)**

My Memorable Date Hint:

Please select **Continue** to proceed or click **Cancel** to end the Sign Up process.

**6** **Continue** Clear All Cancel

**Privacy**

Please keep your Recovery Questions and Hints secure. For more information on how your personal information is collected, please refer to our [Privacy Policy](#) and [Data Collection Statement](#).

**i**

Your answers must contain at least 8 characters and contain at least one of the following: (for example: %, #, @). Your answers must contain at least three characters. Your answers must contain letters, numbers and punctuation characters: comma (,), dash (-), period (.), and question mark (?).



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# Register for Multi Factor Authentication

Once you have logged in via Sign-In Partner or GCKey, you will be prompted to register for Multi-Factor Authentication (as of November 9).

1. On the MFA Registration page, enter your email address in the fields provided under the headings **Email Address** and **Re-type Email Address**.
2. Agree to the terms and conditions and click Continue.
3. Click **Continue**.

The screenshot shows the 'MFA Registration' page with the heading 'Secure Your Account'. Below this, a paragraph states: 'CBSA is committed to protecting your personal information. To improve privacy and security, you have to register for multi-factor authentication. This step is an enhanced security measure for your Government of Canada (GC) online account. To register, you have to use a valid email address. A security code will be sent to the email address you provided.' There are three numbered callouts: 1. A red box highlights the 'Email Address:' and 'Re-type Email Address:' input fields. 2. A green circle highlights the checkbox and the text 'Check this box to indicate that you have read and agree to the following:'. 3. A red box highlights the 'Continue' button. A link for 'Multi-Factor Authentication Privacy and Consent Statement' is visible below the checkbox. A 'Clear All' button is also present.

**MFA Registration**

**Secure Your Account**

CBSA is committed to protecting your personal information. To improve privacy and security, you have to register for multi-factor authentication. This step is an enhanced security measure for your Government of Canada (GC) online account. To register, you have to use a valid email address. A security code will be sent to the email address you provided.

1 **Email Address:**

**Re-type Email Address:**

2 ☐ Check this box to indicate that you have read and agree to the following:  
[Multi-Factor Authentication Privacy and Consent Statement](#)

3 **Continue** Clear All



# Register for Multi Factor Authentication

Continue to enter the code that you have received by email and click submit.

4. Check your email for a one-time passcode. The code is a **six-digit number**.
5. Enter the six-digit code in the **Security Code** field. Then, click the **Submit** button.

The image displays two screenshots from a multi-factor authentication process. The left screenshot, titled 'Multi-factor authentication', shows a form to 'Enter One-Time Passcode'. It states that a security code was sent to the email address 'tcp@tcp.tcp'. A green circle with the number '5' highlights the 'Security Code' input field, which contains the text '209449', and the 'Submit' button below it. The right screenshot, titled 'Verify Your Login', shows an email verification page. It asks for the one-time passcode to log in to a Government of Canada service. A green circle with the number '4' highlights the code '209449' displayed in a red box. Below this, it confirms the email was sent to 'tcp@tcp.tcp' and provides a link for more information: <https://www.cbsa-asfc.gc.ca/eservices/multifactor/multifacteur-eng.html>.



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# Register for Multi Factor Authentication

You have now successfully registered for Multi-Factor Authentication. You will be automatically signed in with an MFA code when signing on to any CBSA portal.

6. The registration screen will inform you of successful registration for multi-factor authentication, and you are now signed in.
7. Click **Accept Terms** to continue to the CARM Client Portal.

The image shows two overlapping screenshots from the CBSA CARM Client Portal. The top screenshot, titled 'MFA Registration', displays a green success message: 'MFA Registration Successful' and 'You have successfully registered for multi-factor authentication.' Below this, it states: 'You will now be prompted to request and enter a new security code each time you access your Government of Canada online account with'. Two buttons are visible: 'Change MFA email' and 'Continue to CARM Portal'. A green circle with the number '6' is placed over the 'Continue to CARM Portal' button, which is also enclosed in a red rectangular box. The bottom screenshot shows the 'Terms and conditions of use' page. It features the Government of Canada logo and text: 'Read the following information as it contains important information regarding the portal's privacy prerequisites to use it.' Below this is the 'CARM Client Portal Privacy Statement and Terms and Conditions of Use' section, starting with a 'PRIVACY STATEMENT'. The text describes CBSA's commitment to privacy and mentions that the portal has self-serve functions for trade chain partners. At the bottom, there are two buttons: 'Accept Terms' and 'I DO NOT Accept'. A green circle with the number '7' is placed over the 'Accept Terms' button, which is also enclosed in a red rectangular box.



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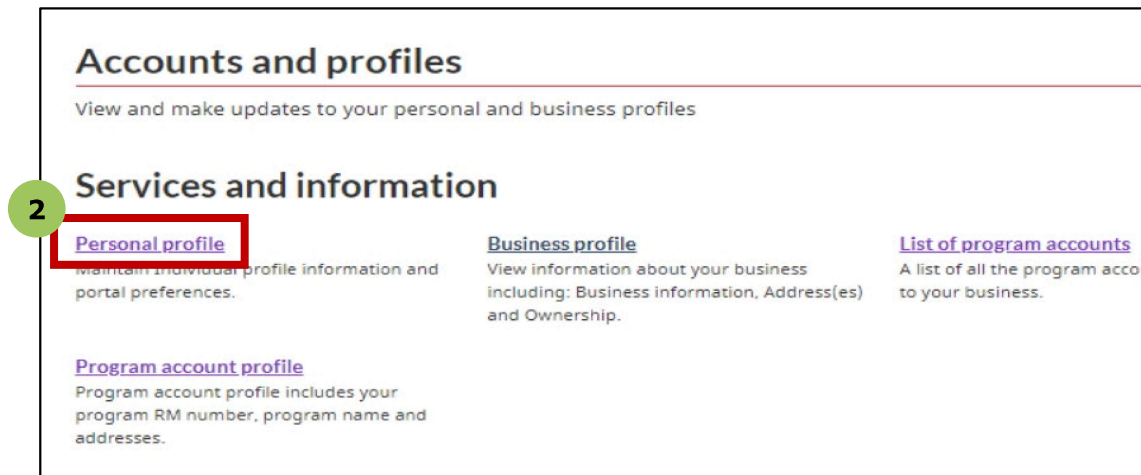
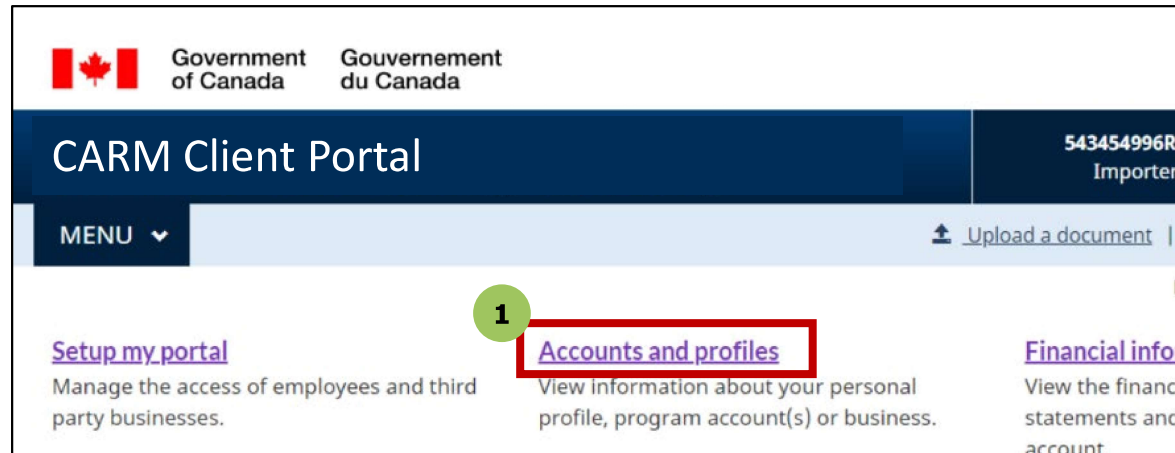
# Personal Profile – Setup

Personal profile setup is available on account creation.

To setup your personal profile, follow the steps below:

1. Click on the **Accounts and profiles** link.
2. Click on **Personal profile**.
3. Complete the personal profile fields (name, telephone number, email address\*, etc.)

\*if you opt in to receiving notifications this is the email that will be used.





# Personal Profile – Subscribe to Notifications

Notification setup is available on account creation and involves selecting On/ Off for receiving not

To setup the notification, follow the steps below:

1. Click on the **Accounts and profiles** link.
2. Click on **Personal profile**.
3. In the **Settings and Preference section** select your preferred notification options.

## Settings and Preferences

### Terms of use for email notification

☐ I have read, understood and agree to the Terms and Conditions listed

#### \* Receive e-mails about notifications (required)

- ☒ Subscribed - I want to receive e-mails about my notifications  
☐ Unsubscribed - I do not want to receive e-mails about my notifications

*Note: You will still receive e-mails about urgent notifications, even if you are unsubscribed.*

#### \* Preferred language (required)

- ☒ English  
☐ French



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# Business Registration



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# Register a Business – Business Account Manager (BAM)

- **Business Account Manager:** this role possesses the highest level of management access over a business account, with complete read, write, and edit privileges.
- Businesses should determine who their Business Account Manager (BAM) will be prior to business account set up.
- BAM will need to have the required legal information to link their business account in the portal.
- Highly recommended that businesses assign at least two Business Account Managers.



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# Business Registration – Before Getting Started

- Have your information ready before starting the process.
- If you need a copy, please reach out to [CARM Engagement](#).
- Also available in Onboarding Documentation section of the portal: [CARM \(canada.ca\)](#)

Canada Border Services Agency / Agence des services frontaliers du Canada

## Registering a Business on the CBSA Assessment and Revenue Management (CARM) Client Portal

Have the following information on hand before you start.

- 1. Identify your Business Account Manager (BAM)**

The Business Account Manager handles all activities related to the business account in the CARM Client Portal (CCP). **The first individual who links their account to the business becomes the Business Account Manager.**

Name: \_\_\_\_\_ Email: \_\_\_\_\_
- 2. Each user needs to create a user profile within the CCP using one of the sign-in options. This includes the Business Account Manager.**

GCKey ([GCKey - FAQ \(clegc-gckey.gc.ca\)](#)) and Sign-in Partner ([Sign-in Partners Help and FAQs - Canada.ca](#)) are authentication processes. These processes allow an individual access to Government of Canada online portal accounts. Users may:

  - Use an existing GCKey that has been created for other Government of Canada portals (except for a CRA GC Key), or create a new GCKey for the CCP. (Please note that your log in credentials for your Canada Revenue Agency (CRA) account will not work in the CARM Client Portal)
  - Use the Sign-in Partner where users authenticate themselves using their own banking credentials

A multi-factor authentication page will prompt the user to enter an email address. This email address will be used to send a six digit passcode. This passcode will need to be entered to log in to the CCP.

Once the Business Account Manager has selected their user credentials, they will create a user profile in the CCP. The Business Account Manager **does not submit an "Employee Access Request"**. Instead, the Business Account Manager selects "Register my business" at the initial setup screen. It is highly-recommended to assign more than one Business Account Manager. The primary Business Account Manager can grant permission to another Business Account Manager after the account is set up.
- 3. Have your Business Number (BN9) and importer/exporter program account identifier (for example: RM00001) information ready.**

This number may be found on Canada Border Services Agency (CBSA) related documents such as a completed B3 Canada Customs Coding form, a Daily Notice, a Statement of Account, a completed B2 Adjustment Request, and/or a Detailed Adjustment Statement (DAS).

BN9 (9 digits): \_\_\_\_\_ RM (4 digit): \_\_\_\_\_

If your business does not have a business number (BN), OR the business has a business number, but not an importer/exporter program account (RM), you will need to register with the CRA: [How to register for a business number or Canada Revenue Agency program accounts - Canada.ca](#)

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# Register my business – for designated Business Account M

[Français](#)



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## CARM Client Portal

[Personal profile](#) | [Logout](#)

### First time setup

#### Request access to my employer

Are you an **employee** who needs to be associated to your employer's registered business?

You will need to know your employer's 9-digits business number (BN9).

#### Find a business

\* Business number (BN9) (maximum 9 characters) **(required)**

Search

#### Register my business

Are you a **business account manager** who wants to use the CARM Client Portal for your business?

You will need to have access to privileged information for this process.

Register my business



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## CARM Client Portal

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[Home](#) > [Setup my Portal](#)

### Business linking requirements

To link your business to the portal you will need a **Business Number** (BN) and an **import-export program account** (RM).

A Business Number is a 9-digit number assigned by the Canada Revenue Agency (CRA). It is the standard identifier for businesses and is unique to a business or legal entity.

It is a 15-digit number assigned by the Canada Revenue Agency (CRA), made up of the 9-digit business number followed by a 6-digit alphanumeric number used to identify the business import-export accounts (e.g., 123456789RM000).

#### An example of a Business Number RM account

Business number	Reference number
1 2 3 4 5 6 7 8 9	R M 0 0 0 2
Program identifier	

To find out how to register for both a business number and an import/export program account, go to [How to register a business number or Canada Revenue Agency program accounts](#). If you are a Non-Resident, please contact your designated [Non-Resident Tax Services Office](#).

If you already have a Business Number RM account, click next to continue linking your business.

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## CARM Client Portal

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[Home](#) > [Setup my Portal](#) > [Requirements](#)

## Enter your business number and program reference number

\* Business number (999999999) (required) ⓘ

123456789

\* Importer program reference number (RM1234) (required) ⓘ

RM 0001

☒ I, John Doe (Devuser108), certify that I am hereby authorized to act on behalf of the business to conduct trade activities with the Canada Border Services Agency (CBSA)

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# Register my business – for designated Business Account M

## Validate your business information

Fill in the fields below to validate your business. If you encounter errors, make sure you have entered the exact legal entity name for your business.

If you are a sole proprietor, use your personal legal name (for example, Jane Doe). In all other scenarios, you should use the legal corporate name of your business (for example, ABC Incorporated).

### Business number

123456789

### \* Legal entity name (max. 175 characters) (required) ⓘ

123456789 Canada Inc.

## Legal entity address details

Enter the information from one of the addresses (physical, mailing or books and records) provided to the CRA when you registered your business.

### \* Address Line 1 (required)

2021 CARM Lane

### Address Line 2

### P.O box/R.R

### \* Country (required)

Canada

### \* Province/State (required)

British Columbia

### \* City (required)

Vancouver

### \* Postal/Zip Code (required)

C2R 1M2

Next ➔




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# Register my business – for designated Business Account M

## Validate your business information

 The provided business information does not match our records. Please validate the spelling and try again.

Fill in the fields below to validate your business. If you encounter errors, make sure you have entered the exact legal entity name for your business.

If you are a sole proprietor, use your personal legal name (for example, Jane Doe). In all other scenarios, you should use the legal corporate name of your business (for example, ABC Incorporated).

- If the information you input does not match the records of CBSA, you will see this error message.



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# Register my business – for designated Business Account M

- The CARM Client Portal will guide you through the process and the questions you will need to answer.
- You will need to answer one or two of three questions, the system will guide you.
- Only the questions that apply to your RM account will be presented.
- The information can be found on your Daily Notice or Statement of Account.
- Answers must be identical to those found on the Daily Notice or Statement of Account, and should only be entered using numbers and decimals (using dollar signs and commas will result in an error message).

## Validate your transaction information

Answer the following question(s) for the identified program account. If you encounter an error, please contact your account manager and enter the appropriate answer.

Business number RM account  
123456158RM0001

### \* Question 1 (required)

Select a question

### \* Question 2 (required)

Select a question

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# Register my business – for designated Business Account M

## Question: SOA balance from last 6 years

Enter the date of an SOA from the past six years, then enter the balance of that SOA in the space p

Balance of a Statement of Account (SOA) back to 2016-10-17

\* Statement of Account (SOA) Date (required) 

09/2022



\* Statement of Account (SOA) balance (required) 

4300.00

\$CA



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# Register my business – for designated Business Account M

## Question: Payment amount and date

Enter the Payment date and Payment amount for an import accounting transaction accepted by the business in the past six years.

Provide an exact amount of a payment that has been applied to your account since 2016-10-17

\* Payment date (required) 

09/2022



\* Payment amount (required) 

4300.00

\$CA



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# Register my business – for designated Business Account M

## Question: Total duties and taxes for an import accounting transaction

Enter the total amount of duties and taxes for an import accounting transaction accepted by the CBSA from 2016-10-17 to the present.

The total amount of duties and taxes for an import accounting transaction accepted by the CBSA from 2016-10-17 to the present.

\* Transaction number (required) 

12155538621212

\* Total amount of duties and taxes (required) 

-9876.00 \$CA



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# Register my business – for designated Business Account M

## Validate your transaction information

### Incorrect answer(s)

Answer the following questions regarding your Statement of Account (SOA) or Daily Notice (DN). If you encounter an error, make sure you have entered the appropriate answer and verify your spelling. For security reasons, your account will be locked after 10 failed attempts.

- If the information you input does not match the records of CBSA you will see this error message.
- For security reasons, your account will be locked after 10 failed attempts – if this occurs you must contact the [CARM Client Support Helpdesk](#) to request an account unlock



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# Register my business – for designated Business Account M

## Review your business information

Review the business information provided and confirm registration.

As a result of this process, you will be assigned the role of business account manager for this account. The Setup my portal section can be used to give your employees or representatives access to your program account(s).

### Business number

123456789

### Legal entity name

123456789 Canada Inc.

## Identified program account(s)

The following programs were found to be associated to your business. If the information below is incorrect, please contact the CBSA.

### Program Account Numbers

123456789RM0001

[← Previous](#)

[Confirm](#)

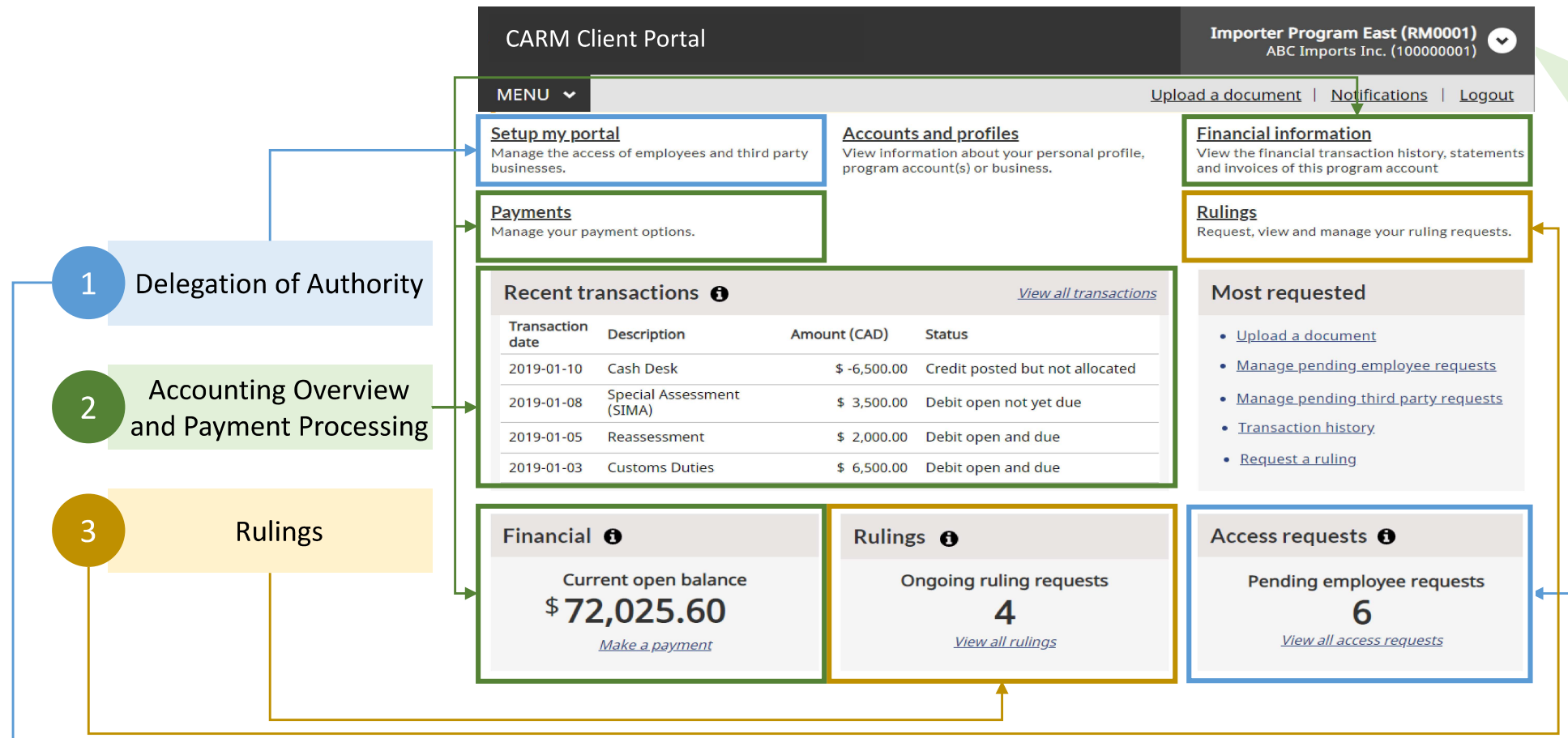


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# CARM Client Portal

Portal will bring together all account information



# Once Business is Registered, Advise your employees to “Request access to my employer”



Government  
of Canada

Gouvernement  
du Canada

## CARM Client Portal

[Personal profile](#) | [Logout](#)

### First time setup

#### Request access to my employer

Are you an **employee** who needs to be associated to your employer's registered business?

You will need to know your employer's 9-digits business number (BN9).

#### Find a business

\* Business number (BN9) (maximum 9 characters) **(required)**

#### Register my business

Are you a **business account manager** who wants to use the CARM Client Portal for your business?

You will need to have access to privileged information for this process.



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# Once Business is Registered, Advise your employees to “Request access to my employer”

## First time setup

### Request access to my employer

Are you an **employee** who needs to be associated to your employer's registered business?

You will need to know your employer's 9-digits business number (BN9).

#### Find a business

\* Business number (BN9) (maximum 9 characters) **(required)**

#### Found match

Business operating/trade name

123456789 Canada Inc.

#### Specify why you need access

\* Comments (maximum 256 characters) **(required)**

**This field is required.**

Employee of 123456789 Canada Inc. requires edit access to RM0001.

### Register my business

Are you a **business manager** who wants to register your business in the CARM Client Portal?

You will need to have access to privileged information to complete the registration process.



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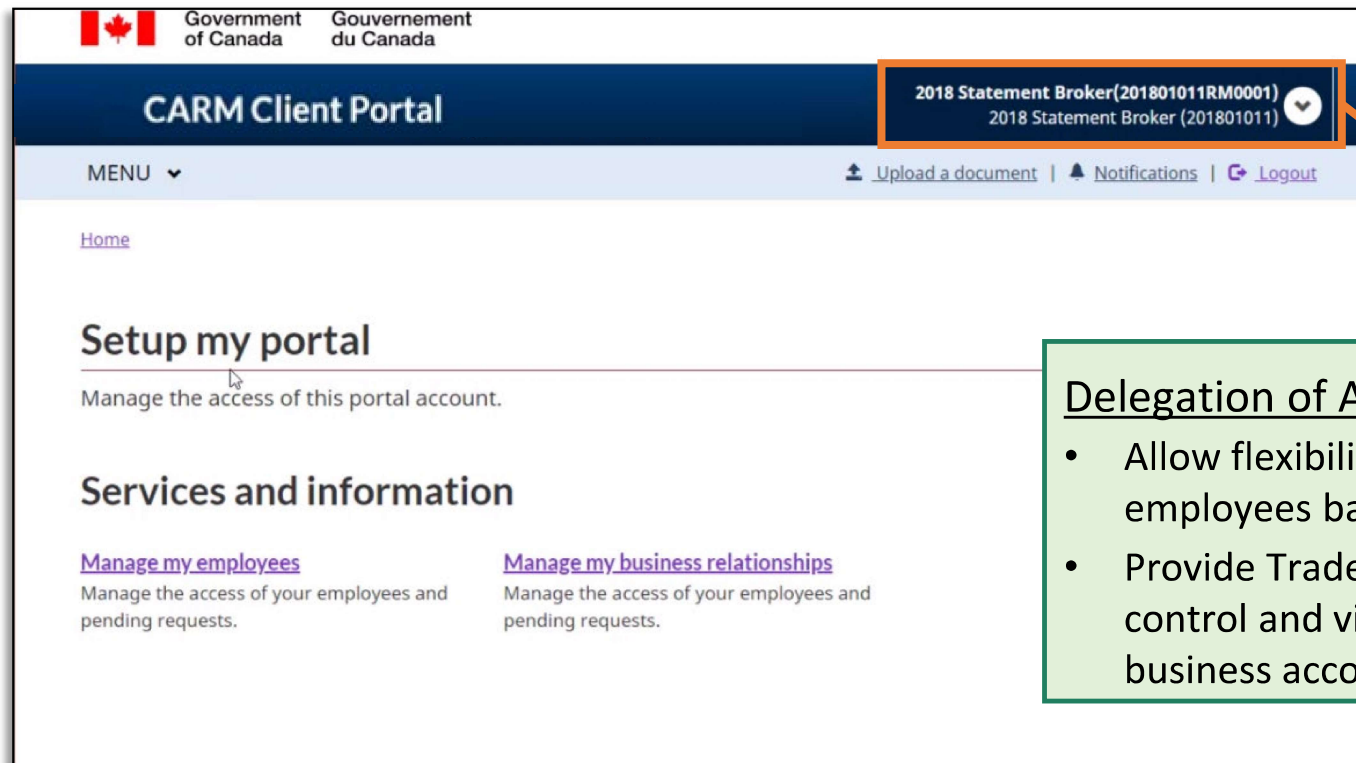
# Delegation in the CARM Client Portal



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# Delegation of Authority via the CARM Client Portal

Importers will be able to delegate their customs broker(s) to manage their account and perform transactions on their behalf.



This shows which account the user is logged in as. For an importer that has multiple accounts, they will be able to switch between them.

## Delegation of Authority will:

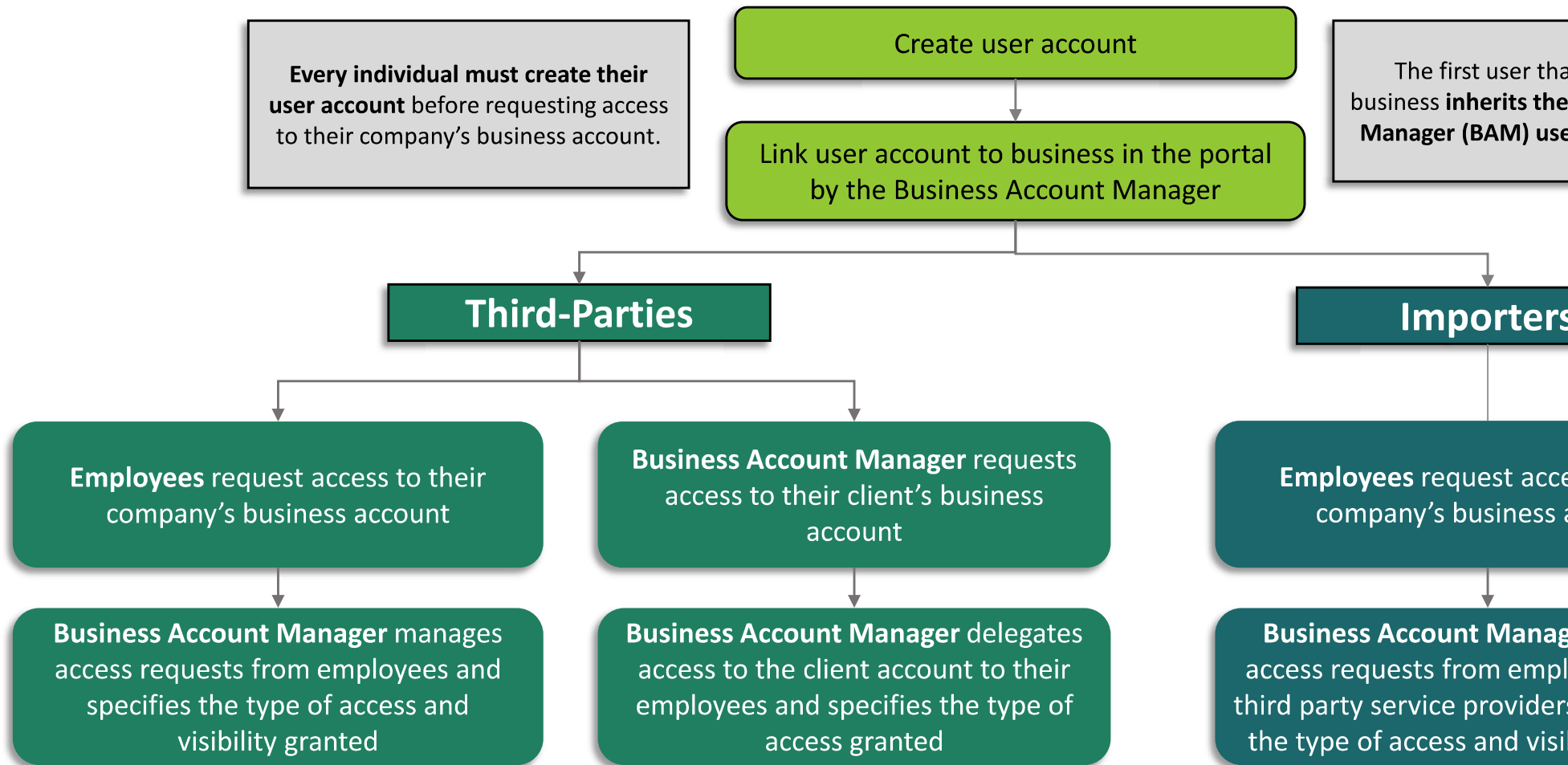
- Allow flexibility in managing access to specific employees based on roles and visibility rules
- Provide Trade Chain Partners with greater control and visibility over who has access to the business account



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# Key steps to delegate access to a business account



# Delegation of Authority Request

**CARM Client Portal** **Importer Program East (RM0001)**  
ABC Imports Inc. (100000001)

MENU [Upload a document](#) | [Notifications](#) | [Logout](#)

**Setup my portal**  
Manage the access of employees and third party businesses.

**Accounts and profiles**  
View information about your personal profile, program account(s) or business.

**Financial information**  
View the financial transaction history, statements and invoices of this program account

**Payments**  
Manage your payment options.

**Rulings**  
Request, view and manage your ruling requests.

**Recent transactions** [View all transactions](#)

Transaction date	Description	Amount (CAD)	Status
2019-01-10	Cash Desk	\$ -6,500.00	Credit posted but not allocated
2019-01-08	Special Assessment (SIMA)	\$ 3,500.00	Debit open not yet due
2019-01-05	Reassessment	\$ 2,000.00	Debit open and due
2019-01-03	Customs Duties	\$ 6,500.00	Debit open and due

**Financial** [View all transactions](#)

Current open balance  
**\$ 72,025.60**  
[Make a payment](#)

**Rulings** [View all rulings](#)

Ongoing ruling requests  
**4**

**Access requests** [View all access requests](#)

Pending employee requests  
**6**

**Most requested**

- [Upload a document](#)
- [Manage pending employee requests](#)
- [Manage pending third party requests](#)
- [Transaction history](#)
- [Request a ruling](#)

You can manage business relationships with third party service providers by clicking here.

## Manage business relationships

Manage the business relationships and access requests.

**Manage relationships** **Received requests 1**

**Pending third party access requests**

Search

Status	Business name	Request date
Approved	XXXXXXXXXX	2022-03-25
Approved	XXXXXXXXXX	2022-04-08
Pending	XXXXXXXXXX	2021-06-24

Items per page: 10 1 to 3 of 3

Requests will be displayed if your third party service provider sent a request you registered to the Client Portal.

Importers can choose to accept or reject delegation of authority requests.



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# Role differentiation within the portal

Business Account Manager (BAM) will assign roles and visibility rules to employees.

User Role	Description
Business Account Manager	Full management access at the business and program account levels, with the ability to accept new employees to the business and request Third-Party relationships with clients. This role should be given to an active operational user, and not necessarily the owner of the company.
Program Account Manager	Ability to modify program registration information, grant access to employees of their Program and create, edit and view all Program transaction information.
Unassociated User	Has created her personal profile on the CARM Client Portal, but she has not yet been accepted as an employee of their business.
Editor	Ability to create, edit and view all transaction information for a Program.
Reader	Ability to see all transaction information for a Program but is unable to create or edit information.

User Role as a Third-Party	Description
Third-Party Business Account Manager	Ability to manage which of your employees are associated with a client's account. If the client sets the relationship to the business level (full access to all program accounts), you assume the highest possible role based on the relationship established by your client, and you act as the Business Account Manager for this client.
Third-Party Program Account Manager	With delegated access to a client's Program, as a Third-Party Business Account Manager, you have the ability to grant access to employees who will work with the program account.

Transaction visibility for businesses can be set to allow third-party service providers to access transactions that are:

- Submitted by your third-party service provider business
- Submitted by the client
- Submitted by another third-party service provider business



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# Next Steps & Additional Resources



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# Next steps – preparing for the CARM Client Portal

## Important Takeaways:

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**Importers:** Discuss CARM with your broker / trade consultant (if your business works with third parties)

**Brokers/Trade Consultants:** Discuss CARM with your clients

Upon implementation of CARM Release 2, conducting certain importing activities on behalf of clients, such as the accounting declaration submission, may not be possible without proper delegated authority



**Select your Business Account Manager(s) and determine your access structure**

Prior to registering, your organization needs to select the individual(s) who will assume the role of Business Account Manager; and determine access privileges for the rest of your organization



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# Onboarding Documentation

	Resource	Description
<b>Information Sheet</b>	Registering your Business on the CARM Client Portal	Reference sheet to assist in gathering the required information before starting the business registration process.
<b>Educational Information</b>	Release 1 Playbook	Clarification document on concepts, terms, processes, etc. that are referenced on the new portal.
	User Guides	Detailed information on specific functionality, incl. screenshots and step guided information.
	Educational Videos	Step by step videos are available on the CBSA Website (video gallery) CBSA YouTube Channel.

Access the [Onboarding Documentation](#) on the CARM Client Portal and YouTube Videos from the [CBSA Website](#) or [CBSA YouTube Channel \(CARM Playlist\)](#)



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# CARM Client Support Help Desk (CCSH)

Dedicated client service support that will work with ARL, BIS and the TCCU helpdesks.

## Web Contact Form

- Form will prompt requestor for information, allowing the CBSA to address the request in a targeted and expedited manner
- CCSH will return a reply email with a ticket number to acknowledge receipt of the request
- Client Service Representative will provide a written response to the request

## Telephone

- Telephone service will be provided through the Border Information Services telephone number 1-800-461-9999, menu Option 2 – CBSA Assessment and Revenue Management

All methods of contact will result in a follow-up email response.

Hours of Operation will be Monday to Friday (except holidays): 07:00 – 17:00 ET



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# Question & Answer



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# Thank You!

## For more information:

- Visit the [CARM CBSA website](#)
- Link to the [CARM Client Portal](#)
- Visit the [CARM Google Drive](#) for resources
- Join the [CARM LinkedIn Group](#) for the latest news
- Questions? Email: [CBSA.CARM Engagement-Engagement de la GCRA.ASFC@cbsa-asfc.gc.ca](mailto:CBSA.CARM_Engagement-Engagement_de_la_GCRA.ASFC@cbsa-asfc.gc.ca)
- Join the email distribution list by emailing [CBSA.CARM Engagement-Engagement de la GCRA.ASFC@cbsa-asfc.gc.ca](mailto:CBSA.CARM_Engagement-Engagement_de_la_GCRA.ASFC@cbsa-asfc.gc.ca)



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