



# Onboarding to the CARM Client Portal

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PROTECTION • SERVICE • INTEGRITY



# 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



# 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.*





# 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

Release 2: October 2023

## All CARM functionality



### **Access**

Available to all CBSA clients



### **Enrollment**

Ability register and enroll in CBSA programs



### **CAD NEW!**

Ability to submit new commercial accounting declarations, 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 corrections



# Importing is Changing

If you can say 'Yes' to any of the below statements, your organization need register on the CCP:

- ✓ My business imports commercial goods **once** a year or in **small value**
- ✓ My business imports commercial goods through a **courier**
- ✓ My business uses a **customs broker** or third-party service provider to import our commercial goods
- ✓ My business imports goods that will be **sold** or **used**
- ✓ My business imports goods temporarily
- ✓ My business is located **outside of Canada**, and we import goods for commercial purposes into Canada



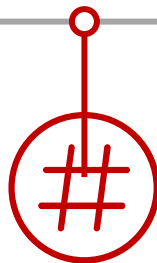
# Introducing the CARM Client Portal

[YouTube Video](#)

# 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.*



## 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).



## 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](#)



## 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.**



## 4. Grant Access to Employees or Representatives

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



## 5. Conduct Business with the CBSA

**You are now set up to conduct business with the CBSA on the CARM Client Portal** (e.g. request a ruling, view transaction history, view your statement of account, make payments, use self-service tools).





# Portal Registration





# CARM Client Portal Home Page

The CARM Client Portal can be first accessed from the [CBSA Website](#). Save the URL to your browser favorites 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 \(CCP\)](#)

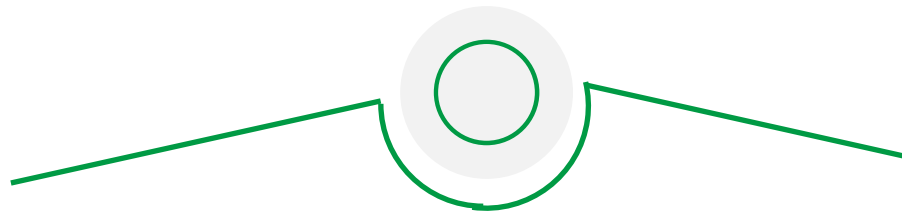
The screenshot shows the CARM Client Portal Home Page. At the top, there is a header with the Government of Canada logo and name in both English and French, a search bar, and a language selector set to 'Français'. Below the header is a 'MENU' dropdown. The main content area features the title 'CARM Client Portal' and a subtitle 'View public information related to the Commercial Client Portal; Login or register for a portal account.' Under the 'Services and information' section, the link 'Log in to the CARM Client Portal' is highlighted with a red box. Other sections include 'Onboarding documentation', 'List of Licensed customs brokers', 'CARM Open API Catalog', and 'Other resources' with links to the eManifest Portal and Trusted Trader Portal.

[Click to change the portal language](#)

# Initial Setup

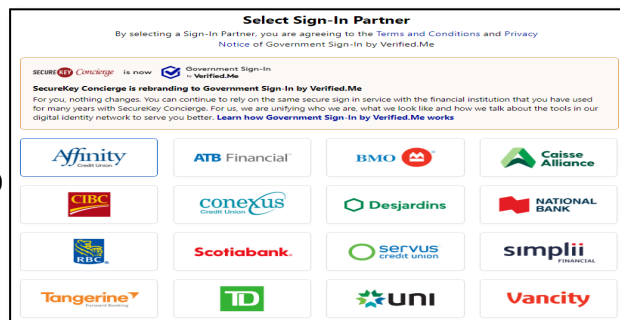
The CARM Client Portal can be first accessed from the [CBSA Website](#). All individuals and businesses must first go through the initial setup prior to using the CARM Client Portal's main functionalities.

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



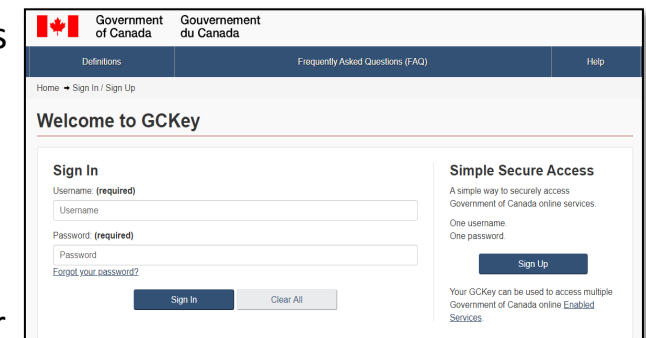
## Sign-In Partners

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.





# Login Through Sign-In Partners

Sign-In Partners

GCKey

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](#)

SECUREKEY 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](#)




# Login Through Sign-In Partners

Sign-In Partners

GCKey

1. Login via your bank.

The screenshot shows the TD Secure Login page. At the top left is the TD logo. The page title is "Secure Login". On the right, it says "Government Sign-In by Verified.Me". There are two input fields: "Username or Access Card" and "Password". Below the password field is a "Remember me" checkbox. There are two buttons: a green "Login" button and a white "Cancel" button. At the bottom left, there is a security guarantee: "TD Online and Mobile Security Guarantee: You are protected >". On the right side, there is a "Description of Service" section with text explaining the partnership and security.

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

The screenshot shows a security screen titled "Enter Security Code". It states: "Your one-time security code was sent by text message to +1 (...)-...-...". Below this, it says "This code will expire in a few minutes." There is an input field labeled "Enter Security Code" with the placeholder text "Type code here" and an "Enter" button. Below that, there is a section for "Didn't receive your security code?" with options to "Call me" or "Text me". At the bottom, it says "Standard wireless carrier message and data rates may apply." There is also a "Read more FAQs" link at the very bottom.



# 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?](#)

### Simple Secure Access

A simple way to securely access Government of Canada online services.

One username.  
One password.

**1**

Your GCKey can be used to access multiple Government of Canada online [Enabled Services](#).

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



# 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.

Definitions Frequently Asked Questions (FAQ) Help

Home → GCKey Sign Up Step 2 of 4

Terms and Conditions Username Password Questions and Answers

### Create Your Username

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:

- 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;
- always keep your Username secure and do not share it with anyone.

Privacy

Please keep your Username secure. For more information on how your privacy is protected, please refer to our [Personal Information Collection Statement](#).

Create Your Username: (required)

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

Continue Clear All Cancel

Home → GCKey Sign Up Step 3 of 4

Terms and Conditions Username Password Questions and Answers

### Create Your Password

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.

Privacy

Please keep your Password secure. For more information on how your privacy is protected, please refer to our [Personal Information Collection Statement](#).

Password Checklist

- 8-16 Characters
- Does not contain 3 consecutive characters from Username
- Valid characters
- Lower case letter(s)
- Upper case letter(s)
- Digit(s)
- Passwords match

Create Your Password: (required)

Confirm Your Password: (required)

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

Continue Clear All Cancel





# Create Your GCKey

Sign-In  
Partners

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**

#### Privacy

Please keep your Recovery Question, Answers and Hints secure. For more information on how your privacy is protected, please refer to our [Personal Information Collection Statement](#).

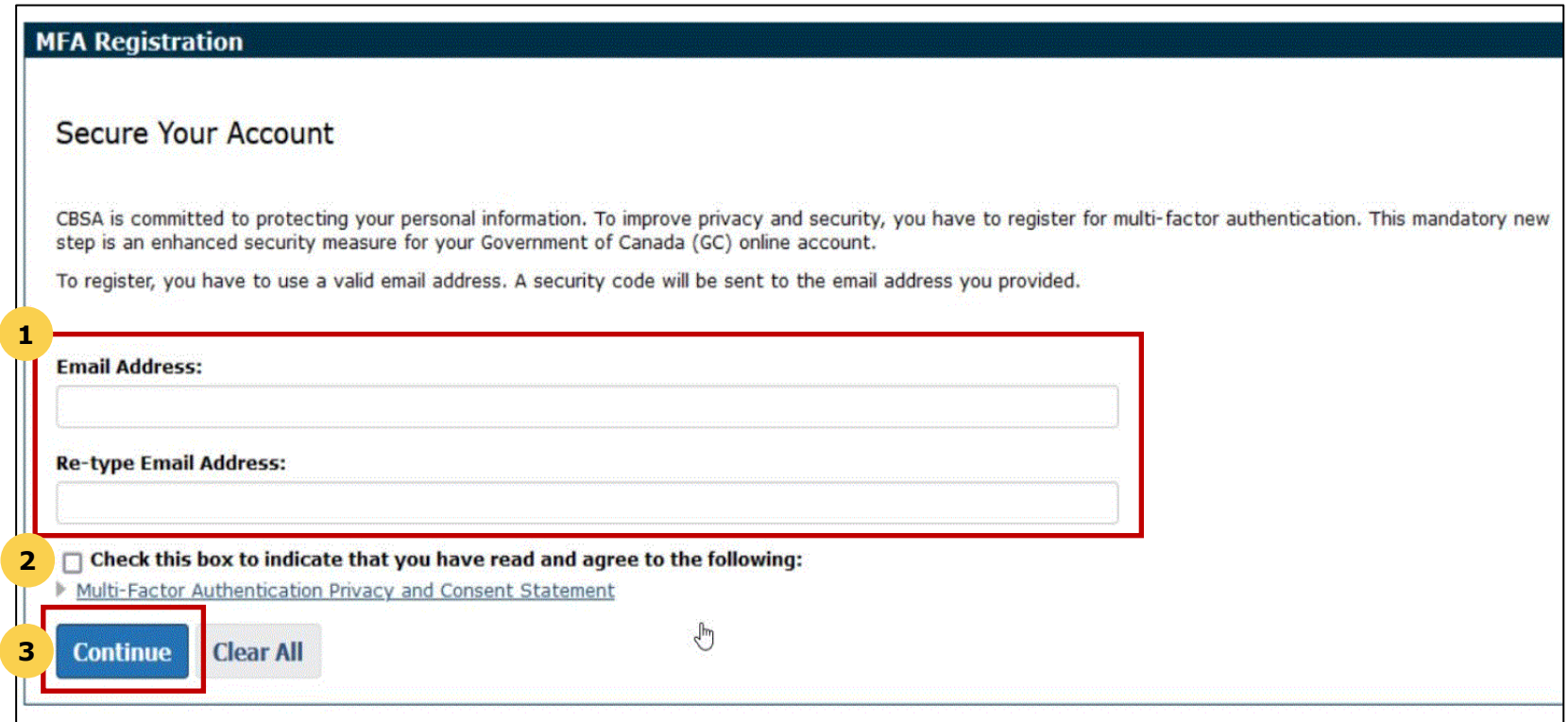
**i**

Your answers must contain at least three characters and contain no special characters (for example: %, #, @). Your hints must contain at least three characters and may contain letters, numbers and the following punctuation characters: apostrophe ('), comma (,), dash (-), period (.) and question mark (?).

# 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

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**.



**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 mandatory new 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**



# Register for Multi Factor Authentication

Sign-In  
Partners

GCKey

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.

### Multi-factor authentication

**Enter One-Time Passcode**

We have sent you a security code to your email address: tcp@tcp.tcp

**5**

**Security Code**

**Submit**

If you did not receive the one-time passcode, you may request it again. The CBSA will resend the passcode to the email address you previously provided.

**Resend**

### Verify Your Login

Your one-time passcode to log in to your Government of Canada service is:

**4**

**209449**

This email was sent to tcp@tcp.tcp

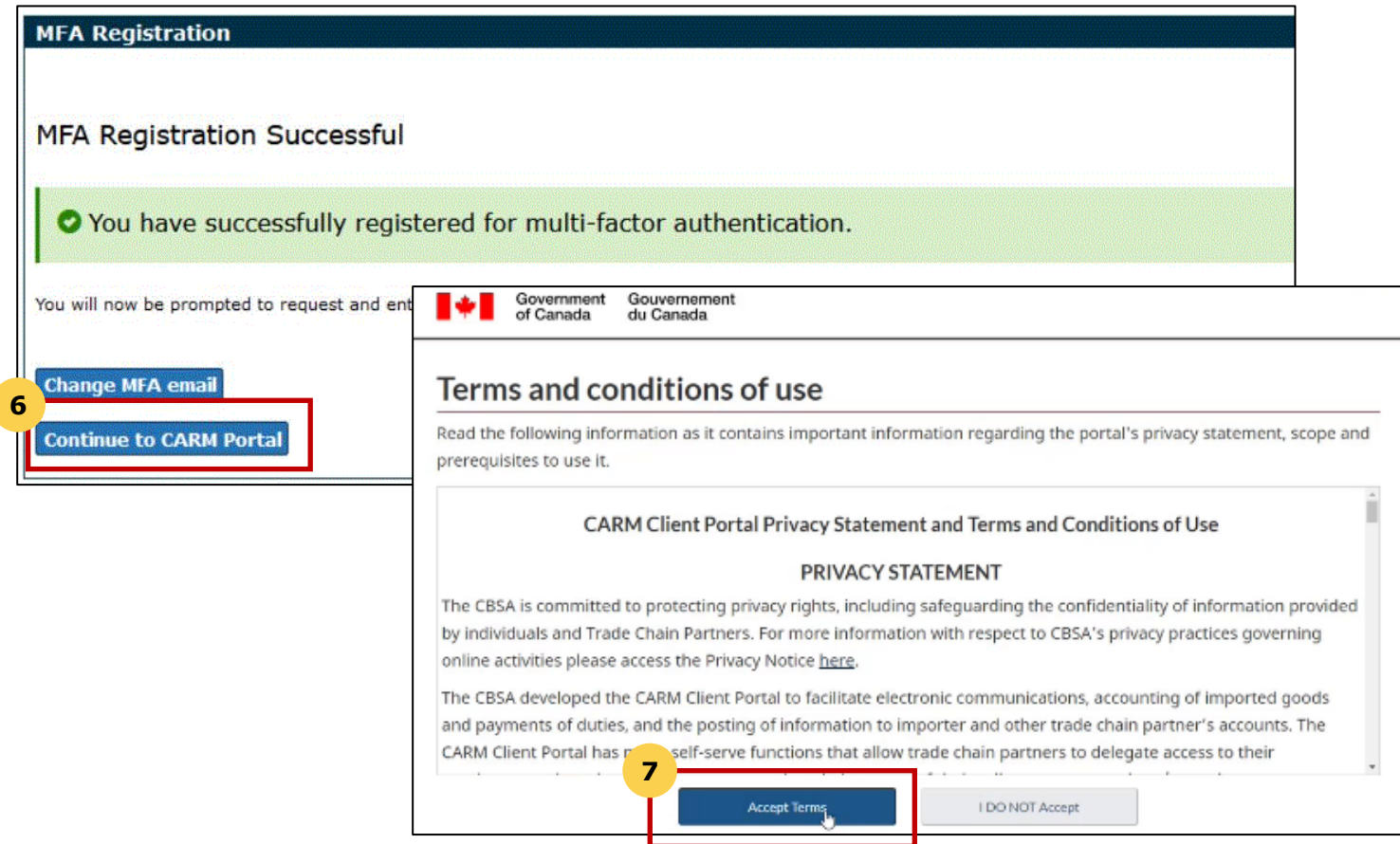
You received this email because you signed up for a Government of Canada login account.

For more information or if you received this email in error please visit:  
<https://www.cbsa-asfc.gc.ca/eservices/multifactor-help-aide-multifacteur-eng.html>

# Register for Multi Factor Authentication

You have now successfully registered for Multi-Factor Authentication. You will be automatically sent an email 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.



The screenshot shows two overlapping web pages. The top page is titled "MFA Registration" and displays "MFA Registration Successful" with a green checkmark and the message "You have successfully registered for multi-factor authentication." Below this, there are two buttons: "Change MFA email" and "Continue to CARM Portal". A yellow circle with the number "6" is positioned next to the "Continue to CARM Portal" button. The bottom page is titled "Terms and conditions of use" and contains the "CARM Client Portal Privacy Statement and Terms and Conditions of Use". It includes a "PRIVACY STATEMENT" section. At the bottom of this page, there are two buttons: "Accept Terms" and "I DO NOT Accept". A yellow circle with the number "7" is positioned next to the "Accept Terms" button.

7. Click **Accept Terms** to continue to the CARM Client Portal.



# 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.

Government of Canada / Gouvernement du Canada

CARM Client Portal

543454996RM0002(543454996RM0002)  
ImporterCompany7322 (543454996)

MENU

Upload a document | Notifications | Logout

Last logged in 2020-09-18 14:16 ET

[Setup my portal](#)  
Manage the access of employees and third party businesses.

**1** [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.

Accounts and profiles

View and make updates to your personal and business profiles

**2** [Personal profile](#)  
Maintain individual profile information and portal preferences.

[Business profile](#)  
View information about your business including: Business information, Address(es) and Ownership.

[List of program accounts](#)  
A list of all the program accounts associated to your business.

[Program account profile](#)  
Program account profile includes your program RM number, program name and addresses.





# Personal Profile – Subscribe to Notifications

Notification setup is available on account creation and involves selecting On/ Off for receiving notifications.

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 above.

**\* 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





# Business Registration




# 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) is 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.

# 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 \(degc-gckey.gc.ca\)](#)) 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: RM0001) 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](#)

2



# Register my business – for designated Business Account Manager

[Français](#)



## 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

Note: In the case of multiple BN9 accounts, multiple user accounts will be required as a single user account cannot be linked to more than one BN9.



# Register my business – for designated Business Account Manager



## CARM Client Portal

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

[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., 123456789RM0001).

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



To find out how to register for both a business number and an import/export program account, go to [How to register for 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.


[← Previous](#)

[Next →](#)



# Register my business – for designated Business Account Manager

[Français](#)

 Government of Canada / Gouvernement du Canada

## CARM Client Portal

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

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

### Enter your business number and program reference number

\* Business number (999999999) (required) ⓘ

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

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)





# Register my business – for designated Business Account Manager

## 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 →



# Register my business – for designated Business Account Manager

## 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.



# Register my business – for designated Business Account Manager

- 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 errors, make sure you have entered the appropriate answer.

Business number RM account  
123456158RM0001

\* Question 1 (required)

Select a question

\* Question 2 (required)

Select a question

← Previous

Next →



# Register my business – for designated Business Account Manager

## 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 provided.

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



# Register my business – for designated Business Account Manager

## Question: Payment amount and date

Enter the Payment date and Payment amount for an import accounting transaction accepted by the CBSA 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




# Register my business – for designated Business Account Manager

## 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 in the past six years.

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

\* Transaction number (required) 

12155538621212

\* Total amount of duties and taxes (required) 


-9876.00 \$CA





# Register my business – for designated Business Account Manager

## Validate your transaction information

 Incorrect answer(s)

Answer the following questions regarding your Statement of Account (SOA) or Daily Notice (DN). If you encounter errors, 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



# Register my business – for designated Business Account Manager

## 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

---

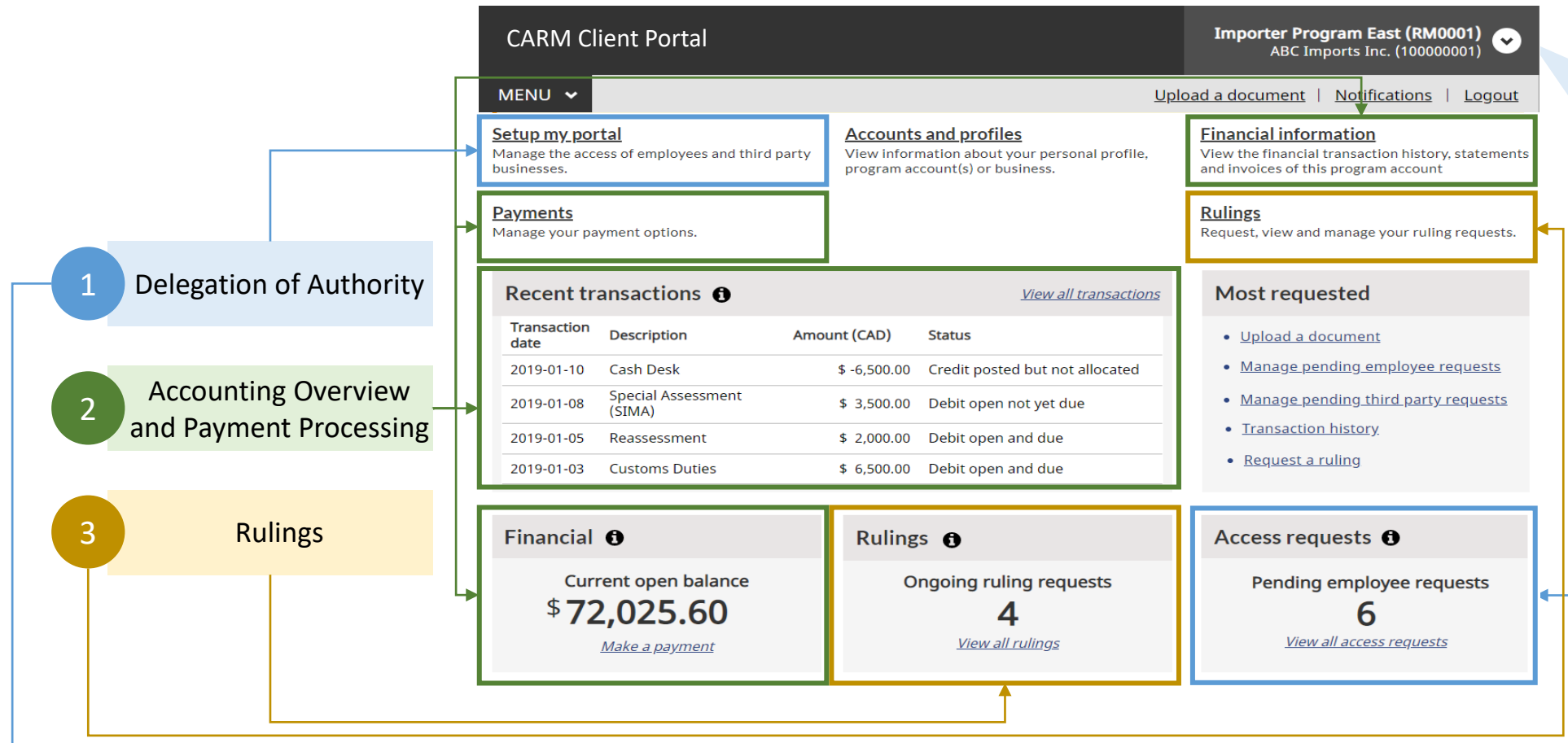
[← Previous](#)

[Confirm](#)



# CARM Client Portal

Portal will bring together all account information



The main dashboard view is always from the perspective of a **specific program (RM)**. It is not an aggregated view of all programs under a BN9.

\*\*This is a conceptual mock-up\*\*

If you have been locked out of your account for any reason, please contact the CARM Client Support Helpdesk



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

[Français](#)



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.



# 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)

### 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.

#### Found match

Business operating/trade name  
123456789 Canada Inc.

#### Specify why you need access

\* Comments (maximum 256 characters) (required)

This field is required.



# Delegation in the CARM Client Portal





# 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.

Government of Canada / Gouvernement du Canada

**CARM Client Portal**

2018 Statement Broker (201801011RM0001)  
2018 Statement Broker (201801011)

MENU ▾ | Upload a document | Notifications | Logout

[Home](#)

### Setup my portal

Manage the access of this portal account.

### Services and information

[Manage my employees](#)  
Manage the access of your employees and pending requests.

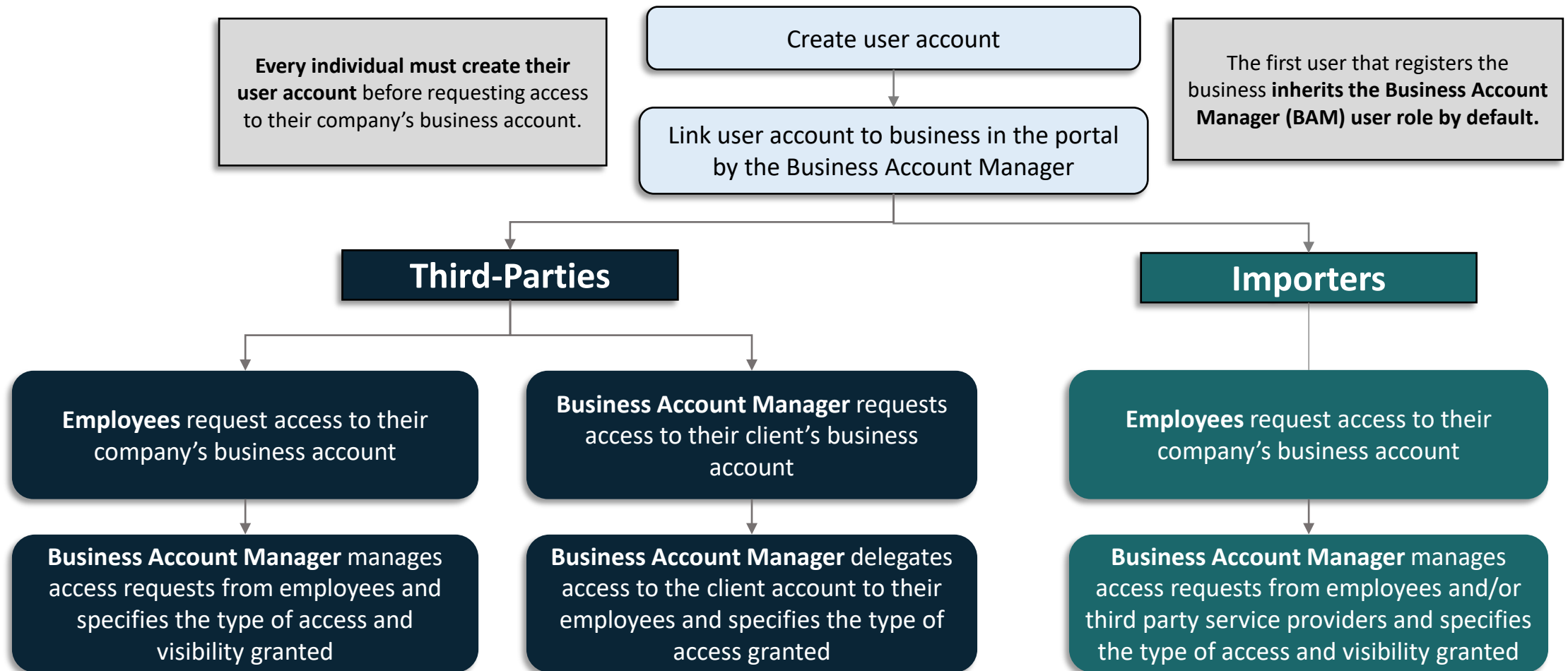
[Manage my business relationships](#)  
Manage the access of your employees and pending requests.

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

- 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 their business account



# 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.

**Payments**  
Manage your payment options.

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

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

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

**Most requested**

- Upload a document
- Manage pending employee requests
- Manage pending third party requests**
- Transaction history
- Request a ruling

**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**

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

**Rulings**

Ongoing ruling requests  
**4**  
[View all rulings](#)

**Access requests**

Pending employee requests  
**6**  
[View all access requests](#)

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

Status	Business name	Request date	Actions
Approved	XXXXXXXXXX	2022-03-25	⋮ Details
Approved	XXXXXXXXXX	2022-04-08	⋮ Details
Pending	XXXXXXXXXX	2021-06-24	⋮ Details <input checked="" type="checkbox"/> Approve <input checked="" type="checkbox"/> Reject

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

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



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



# Next Steps & Additional Resources



# 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 a client, such as the accounting declaration submission, may not be possible without proper delegation of 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





# 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-by-step guided information.
	Educational Videos	Step by step videos are available on the CBSA Website (video gallery) and the CBSA YouTube Channel.

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



# 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 line: 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



# Question & Answer



# 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)

