



Canada Border  
Services Agency

Agence des services  
frontaliers du Canada

# CARM Solution Spotlight - CARM Client Portal Onboarding

Updated: November 2020

Canada

**CARM** | CBSA Assessment and  
Revenue Management

# The CARM Client Portal will be introduced in Release 1

## Release 0

### Upgrade – Accounts Receivable Ledger (ARL)

- ✓ No action required from Trade Chain Partners\*

\*Recipients of Daily Notices may experience a delay in receiving them during the implementation, similar to other ARL updates.

## Release 1

### Basic Functions CARM Client Portal

- ✓ **Open to importers, customs brokers and trade consultant (all other clients will gain access with Release 2)**
- ✓ Ability to grant access to your portal account to third-party service providers (customs broker, trade consultant)
- ✓ New online payment options (credit card payments, pre-authorized debit, etc.)
- ✓ Tools to help classify goods and estimate duties and taxes
- ✓ Application Program Interface (API) to retrieve tariff data
- ✓ Ability to electronically request rulings and track their progress

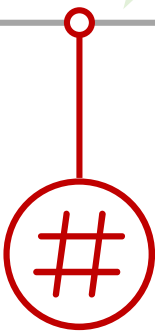
## Release 2

### All Functions CARM Client Portal

- ✓ Open to all trade community
- ✓ Business registration and program enrolment
- ✓ Electronic commercial accounting declarations with ability for corrections and adjustments (to replace current B3 Customs Coding and B2 Request for Adjustment forms)
- ✓ Changes to Release Prior to Payment requirements for bonds
- ✓ Harmonized billing cycles
- ✓ New offsetting options
- ✓ Electronic management for appeals and compliance actions

# CARM Client Portal Onboarding Process

Step 1 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 **program account identifier (RM number)** 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 to create your individual user account:

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



## 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.

*\*See solution spotlight on delegation of authority for more information on this step.*



## 3. Link User Account with Business Account

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

**The company's Business Account Manager must complete this step.** The following information will be required for setup:

- Legal entity name and full address
- Affinity question information (e.g., transaction number and associated duties and taxes, last payment amount and last statement of account balance)



## 5. Use the CARM Client Portal

**You are now set up to use the CARM Client Portal** (e.g. to request a ruling, view transaction history, view statement of account, use self-service tools)

# Frequently Asked Questions

The following represents responses to frequently asked questions related to this aspect of the CARM solution.



**1. What is the purpose of the CARM Client Portal?**

- The CARM Client Portal provides trade chain partners the ability to perform self-service functions such as viewing information about their accounts, making payments, submitting, viewing the status of or changing declarations. It is intended to replace paper and manual processes and to provide more transparency to trade chain partners.

**2. Will it be mandatory to create an account in the CARM Client Portal?**

- All clients that conduct commercial business with the CBSA will be required to create an account in the CARM Client Portal.

**3. How can I obtain a Business Number before Release 2 go-live?**

- You can obtain a business number through the Canada Revenue Agency. For more information see: <https://www.canada.ca/en/revenue-agency/services/tax/businesses/topics/registering-your-business/register.html>

**4. How do I access the CARM Client Portal?**

- Login information for the CARM Client Portal will be communicated at a later date, including detailed guidance (i.e. information/educational products) on how to create your portal user account, how to link to your business account, and how to establish delegated access if required.

**5. When will I be able to submit Commercial Accounting Declarations and view declaration data in the portal?**

- You will be able to submit a Commercial Accounting Declaration via the CARM Client Portal upon the implementation of CARM Release 2.

# More information on CARM

For further details on the project:

- ✓ Visit the [CARM section of the CBSA website](#)
- ✓ 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)
- ✓ Follow CARM on [LinkedIn \(CBSA Assessment and Revenue Management group\)](#)
- ✓ Join the [CARM group on GCcollab](#)