

CARM

CARM Client Portal (CCP)

**Comprehensive Step-by-Step
User Guide**

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What is CARM Client Portal (CCP)? Does it affect my business?

The CCP is a **centralized hub for importers to submit commercial goods declarations** directly to the Canada Border Services Agency (CBSA), request rulings, and access Statements of Accounts (SOAs).

This platform aims to:

1. Simplify trade procedures
2. Enhance importer interaction with CBSA
3. Facilitate the collection and analysis of trade-related data by CBSA

CARM will have an impact on all commercial imports to Canada. This includes Canadian importers of record and Non-Resident Importers (NRI).

Effective October 21, CARM will become the official system for importers to account for their goods and pay applicable duties and taxes to CBSA. Therefore, CCP will not be available during the technical transition period (Oct 4 - Oct 20).

See the next slide for a helpful guide!

Who needs to register in CARM Portal Client?

Do you import from outside of Canada?

"Yes, I do"
OR
"Yes I do, through
a broker or
courier."

"Yes I do, but I
operate my
business in Canada
from outside of
Canada."

"I don't know...
How do I check?"

Check any invoices
to see if your goods
were purchased
from outside of
Canada. If yes,
CARM applies to
your business.

"No, I buy all my
goods within
Canada."

CARM does not
apply to you.

If you purchase
goods from outside
of Canada in the
future, register on
the **CARM Client
Portal**.

Register on the **CARM Client Portal** before **May 13th**

Do you export goods to Canada?

"Yes, and the
shipment is
Delivered Duty
Paid (DDP)"

Must Register on
**CARM Client
Portal** before by
May 13th

"Yes, and the
shipment **is not**
Delivered Duty Paid
(DDP)"

CARM does not apply to you.

"No, I don't
export to
Canada."

Required items to collect PRIOR registration (have them on hand)

- I. Identify who will be the Business Account Manager (BAM): This person has the highest level of access to a business account, and is authorized to read, write, and edit all business information in the CARM Client Portal
- II. Company's Business Number (BN9)
- III. Importer/exporter program reference number (ex: RM0001)
- IV. Legal entity name or operating name of the business
- V. Full physical or mailing address of the legal entity
- VI. For security questions*, you can choose to answer 1 or 2 of the following 3:
 - One single Customs Declaration / Canada Customs Coding Form (B3) previously submitted and accepted by CBSA. You will need to match the information against CBSA records, including the transaction number and the total duties and taxes paid on that entry.
 - Previous Payment amount to CBSA: The CCP will ask you to select a date (MM/YYYY) and enter a payment amount made on the selected date.
 - Statement of Account Balance: The CCP will ask you to select a date (MM/YYYY) and enter the Statement of Account balance for the selected date.

**Security questions do not apply to new importers.*

Step 1 - Registration process

- Access the [CARM Client Portal](#). (Recommended browsers: Edge or Safari)
- Choose from one of two options to access the CARM Client Portal:

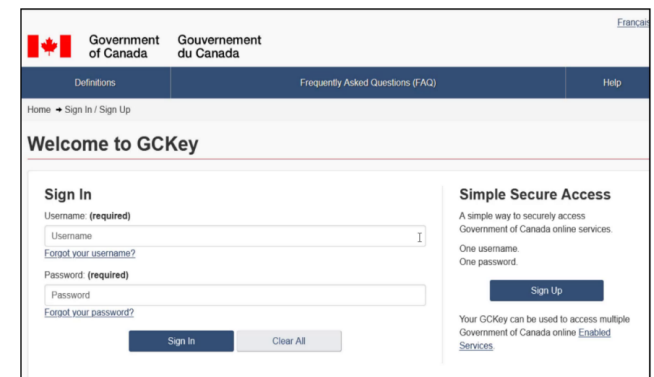
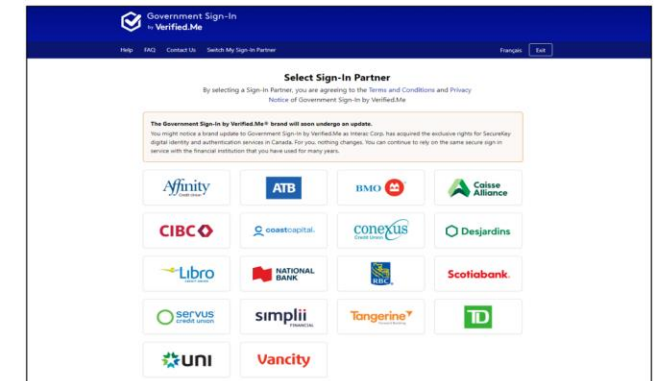
Option 1: Sign-in Partner

The Sign-In Partner option allows users to log in through the web portal of their pre-existing Canadian financial service provider. Sign-In Partners are financial institutions and banks that have partnered with SecureKey Technologies.

Option 2: GCKey

A GCKey is a unique credential that protects your communications with online Government programs and services. You will have the option to sign in using an existing GCKey(*) or you may create a new one.

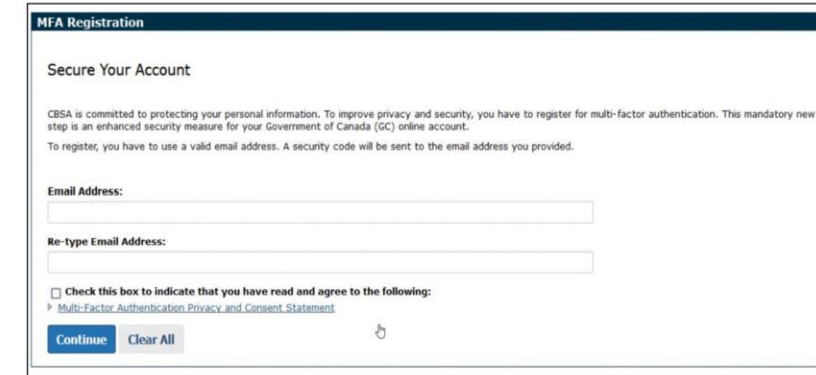
(*) It must be different from the one you use for the Canada Revenue Agency (CRA).



➤ Setup Multi-factor Authentication

Once you have signed in using either a Sign-In Partner or GCKey, you will be taken to the multi-factor authentication registration page.

1. Enter your email address in the fields provided, check the box to indicate that you have read and that you agree to the multi-factor authentication privacy and consent statement and click on the **Continue** button.
2. Check your email for a one-time passcode (six-digit number) and enter this in the Security Code field. Then, click the **Submit** button.
3. Click **Continue to CARM Client Portal** button.



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.

Email Address:

Re-type Email Address:

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

Continue **Clear All**



Multi-factor authentication

Enter One-Time Passcode

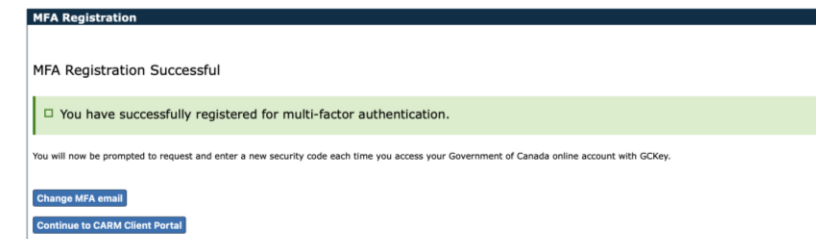
We have sent you a security code to your email address: tcp@tcp.tcp

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



MFA Registration

MFA Registration Successful

☐ You have successfully registered for multi-factor authentication.

You will now be prompted to request and enter a new security code each time you access your Government of Canada online account with GCKey.

Change MFA email

Continue to CARM Client Portal

➤ Register in the CARM CLIENT PORTAL

1. Click **Accept Terms** button

2. Create your Personal Profile:

You will be prompted to create your personal profile including contact details, as well as settings and preferences.

3. First time setup page: After your profile creation, you will be given two options:

a) Register My Business

b) Request Access to My Employer

4. Upon clicking **Register My Business**, you will be greeted with the following screen that details the business linking requirements. Click on **Next** button.

Important Note: This option is intended for authorized users with access to privileged information and will allow the user to set up and complete registration for a business on the portal.

*The user who completes the registration of the business on the CARM Client Portal will automatically become the associated **Business Account Manager (BAM)**, or the person with ultimate account authority.*

5. You will then be required to enter the business number and program reference number, as shown below. Then, click on **Next** button.

The screenshot shows the 'CARM Client Portal' header with the Government of Canada logo and a 'Français' link. Below the header is a 'MENU' dropdown and a 'Personal profile | Logout' link. The main content area is titled 'Business linking requirements' and explains the need for a Business Number (BN) and an import-export program account (RM). It provides details about the Business Number (9-digit) and the RM account (15-digit, including a 6-digit alphanumeric program identifier). An example of a Business Number RM account is shown: Business number 123456789, RM, Reference number 0002, with the Program identifier 123456789RM0002. A link is provided to 'How to register for a business number or Canada Revenue Agency program accounts'. At the bottom, there are 'Previous' and 'Next' buttons.

The screenshot shows the 'Enter your business number and program reference number' page. It has two required input fields: 'Business number (999999999) (required)' and 'Importer program reference number (RM1234) (required)'. Below these fields is a checkbox for 'I, Livi Family, certify that I am hereby authorized to act on behalf of the business to conduct trade activities with the Canada Border Services Agency (CBSA)'. At the bottom, there are 'Previous' and 'Next' buttons.

6. Complete and validate your business information and click **Next** to continue

7. Complete and validate your transaction information and click **Next** to continue

*Important Note: If you have transacted with CBSA directly or indirectly in the past four years, you **MUST** enter in the data from 2 of 3 authentication options.*

- One single **Customs Declaration / Canada Customs Coding Form (B3)** previously submitted and accepted by CBSA. You will need to match the information against CBSA records, including the transaction number and the total duties and taxes paid on that entry.
- **Previous Payment Amount to CBSA:** The CCP will ask you to select a date (MM/YYYY) and enter a payment amount made on the selected date
- **Statement of Account Balance:** The CCP will ask you to select a date (MM/YYYY) and enter the Statement of Account balance for the selected date

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
123456158

* Legal entity name or Operating name (max. 175 characters) (required) 

T&P Customs Brokers

Legal entity address details

Enter the physical or mailing address of the legal entity (BN9) that is currently on file with the Canada Revenue Agency (CRA).

P.O. box/R.R.
[]

* Address Line 1 (required)

[]

Address Line 2
[]

* Country (required)

[]

Province/State
[]

* City (required)

[]

Postal/Zip Code
[]

[< Previous](#)

[Next >](#)

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 >](#)

8. Review your business information and click **Confirm** button.

Congratulations, Step 1 is complete!!!

Important Next Steps: We VERY STRONGLY urge you to setup the below two links within your CCP. Otherwise, each shipment will require your direct involvement through the portal and cargo will be held if there are any issues.

- 1) Link your customs broker (Slides 12 to 13)
- 2) Additional Employees and Authorized Users (Slides 14 to 18)

Confirm registration

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	Legal entity name
123456158	T&P Cutsom Brokers

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 at 1-800-491-9999.

Program Account Numbers
123456158RM0001
123456158RM0002
123456158RM0003

[← Previous](#)[Confirm](#)

Step 2 – Add Business Relationships

Clients, such as importers, can grant access to service providers, like customs brokers, enabling them to manage their accounts within the CBSA. Establishing a business relationship is necessary for service providers to conduct transactions with the CBSA on behalf of their clients. There are two business relationship access types:

Business Management Relationship

In this arrangement, the service provider gains access to **all program accounts**, including any future additions.

Program Management Relationship

This arrangement grants the service provider access solely to **specified program accounts**.

Business Relationships – Customs Broker

NOTE: Only a service provider (such a Custom Broker) can initiate a business relationship. It is their responsibility to send a request to their client with an existing account on the portal.

- **Link your Custom Brokers with your business account**
 1. Notify your Broker that you have completed registration in the Portal so that they can send you the **Business Relationship request**. They must provide your Business number and a comment to justify the request.

Note: For Sealion Cargo customers setup with ACCURATE CUSTOMS BROKER, please see the next slide

Create business relationship request
Complete this form to request access to a business as a third party.

Find a business

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

123456789

Specify why you need access

* Comments (maximum 256 characters) (required)

Indicate any additional comments about this request, such as what you need access to and why.

Business Relationships – Customs Broker

The below only applies to Sealion Cargo customers setup with Accurate Customs Brokers Ltd:

If you have provided us a POA or cleared goods via Sealion Cargo in the past two years, the Business Relationship request should already be pending (see slide to the write).

If the invitation is not visible at the time of registration, please contact your Account Manager at Sealion Cargo and we will push the request through again!

CARM Client Portal

MENU

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

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

Manage business relationships

Manage the business relationships and access requests.

[Return to home dashboard](#)

[Manage relationships](#) [Received requests 1](#)

Click to view requests from a third party

Pending third party access requests

Filter items

Status	Business name	Request date	Action:
Pending	ACCURATE CUSTOMS BROKERS LTD	2024-01-01	Details Approve Reject

Click to view more details, or to approve or reject

Business Relationships – Employees

➤ Ask Employee to Request Access

1. Provide them with the Business Number (or BN9) and ask the Employee to follow instructions from Slide 6 to 8, and this time click on the **Request Access to My Employer** button.
2. They should enter the Business Number and provide a reason or note that will be visible to the BAM. Then click **Request Access** button.

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)
100001254

Found match
Business operating/trade name
ImporterCompany1755

Specify why you need access

Comments (maximum 256 characters) (required)
This field is required.

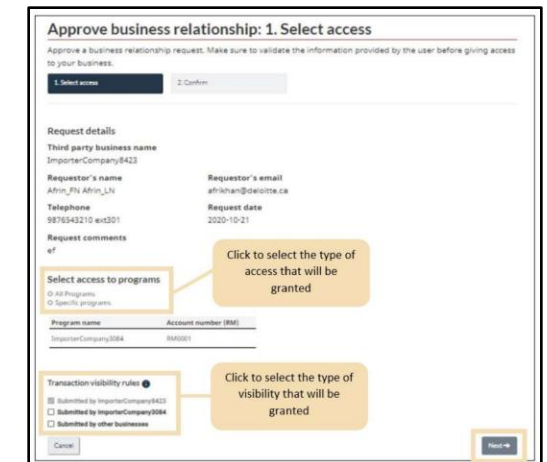
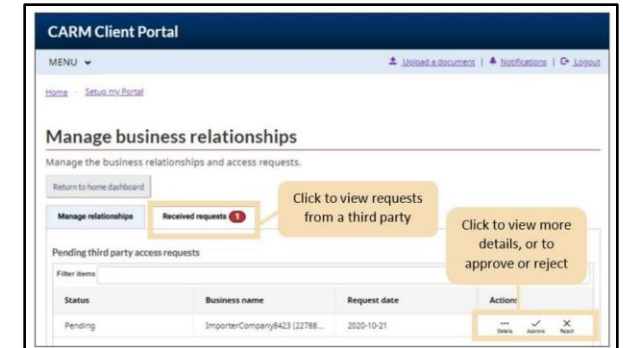
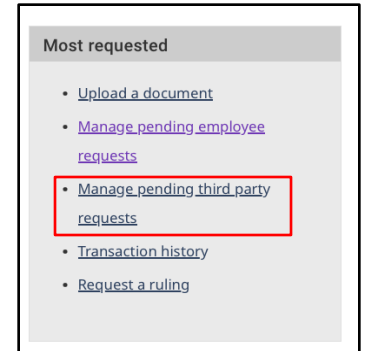
Register my business

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.

3. The BAM will receive a notification in their registered email, informing them that they have a pending request. When entering the Portal, the BAM will be able to access the following options within the main menu. Click on the "**Manage pending third party requests**" option.

4. Select "**Received requests**" tab to view requests from third parties. Click "**Details**" for more info or "**Approve/Reject**" to take action.

5. **Specify Access Type** (All/Specific programs), set **Transaction Visibility**, and click **Next**. Review the access details and click **Approve** to continue or **Cancel** to exit process.



6. Once approved, BAM can edit details of the business relationship such as expiration date, visibility rules, and access type, clicking **Details** button.

7. The broker will be notified via the CARM Client Portal that their relationship request has been accepted once the relationship has been approved.

More information:

- [CARM_R1_User_Guide_Delegation_of_Authority.pdf \(canada.ca\)](#)
- [How to set up a delegation of authority for employees in the CARM Client Portal \(cbsa-asfc.gc.ca\)](#)

Manage business relationships

Manage the business relationships and access requests.

[Return to home dashboard](#)

Manage relationships | **Received requests**

List of business relationships

Search

Status	Business name	Access Type	Actions
Active	TEST Company	Business management	... Details

CARM Client Portal

Home | Setup my Portal | Manage Business Relationships

Business relationship details

View the business relationship details established between your business and your client's business.

Business Details

Business name: Importer/Company1795
 Requester name: Lulu Family
 Expiry date: [Edit](#)

Business Settings

Transaction visibility rules: [Edit](#)

☒ Submitted by Importer/Company1795
☐ Submitted by Importer/Company1795
☐ Submitted by other businesses

Access Summary [Edit](#)

	Organization	User access	Business relationship	Documents	Program	Financial security	Payments	Pre-authorization	Declarations	Billings & Reports
Business Management	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
Test Importer/Company1795	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒

Legend

☒ No access
☐ Read-only
☒ Edit

The option to put an expiry date on a business relationship will only be possible after accepting the initial relationship request. By default, no expiry will be set.

➤ **Grant Access to the Employee via the Portal**

The BAM will receive a notification in their registered email, informing them that they have a pending request. When entering the Portal, the BAM will be able to access the following options within the main menu.

- 1. Click on the **Manage pending employee requests** option.
- 2. A box appears with the pending employee requests and you will have the option to **Approve** or **Reject**.

Most requested

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

Manage employees

Manage the list of employees and the pending requests for employees access.

Return to home dashboard

Manage employees

Access requests 1

Pending employee access requests

Approve selected

Filter items

☐ All	Name	Email	Request date	Actions
☐	Name TEST	TEST@test.com	2024-04-02	⋮ ✓ ✗ Details Approve Reject

- When the BAM selects **Approve**, this screen appears to define the permissions that that person will have within the Business Account.
- Confirm the data and press the **Approve** button.

Congratulations, Step 2 is complete!!!

Approve employee: 1. Select access

Approve an employee access request. Make sure to validate the information provided by the user before giving access to your business.

1. Select access 2. Confirm

Request details

Name	Email	Comment	Status
Name TEST	TEST@test.com	second BAM	To be approved

Select access to programs

☒ All programs
☐ Individual programs

Business	Account number (RM)
101010101RM0001	101010101RM0001

Cancel

No access
Reader
Editor
Program Account Manager
✓ Business Account Manager

Next →

Request details

Name	Email	Comment	Status
Name TEST	TEST@test.com	second BAM	To be approved

Selected access to programs

All programs Business Account Manager

Business	Account number (RM)
101010101RM0001	101010101RM0001

Approve Cancel

Access Summary

	Organization	User access	Business relationship	Documents	Program	Finances	Financial security	Payments	Pre-authorization	Declarations	Rulings & Appeals
Business Management	✍	✍									
101010101RM0001	✍	✍	✍	✍	✍	✍	✍	✍	✍	✍	✍

Legend

✕ No access
👁 Read-only
✍ Edit

← Previous

Additional steps to optimize your CCP profile and functions

Available Functions: The home page of the CARM Client Portal displays several quick access links that will allow you to easily navigate to various functionalities and features found on other pages in the CARM Client Portal.

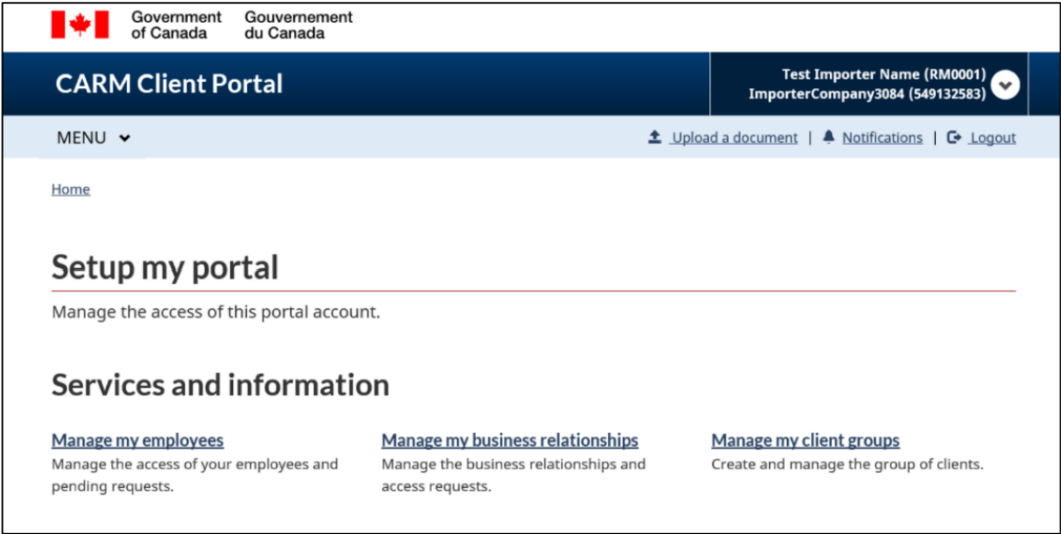
The screenshot displays the CARM Client Portal interface. At the top, the Government of Canada logo is visible. The main header includes the portal name and user information: 'Test Importer Name (RM0001)' and 'ImporterCompany3084 (549132583)'. A 'MENU' dropdown is highlighted. Below the menu, there are six quick access links: 'Setup my portal', 'Accounts and profiles', 'Financial information', 'Payments', 'Declarations', and 'Rulings'. At the bottom, there is a 'Recent Transactions' table and a 'Most requested' list.

Recent Transactions

Transaction date	Description	Amount	Status
2021-03-09	Card Lot	\$ -1,000.99	Credit open
2021-03-09	Card Lot	\$ -3,000.99	Credit open
2021-03-09	Card Lot	\$ -2,000.99	Credit open

Most requested

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



➤ **Setup my Portal**

Manage employees

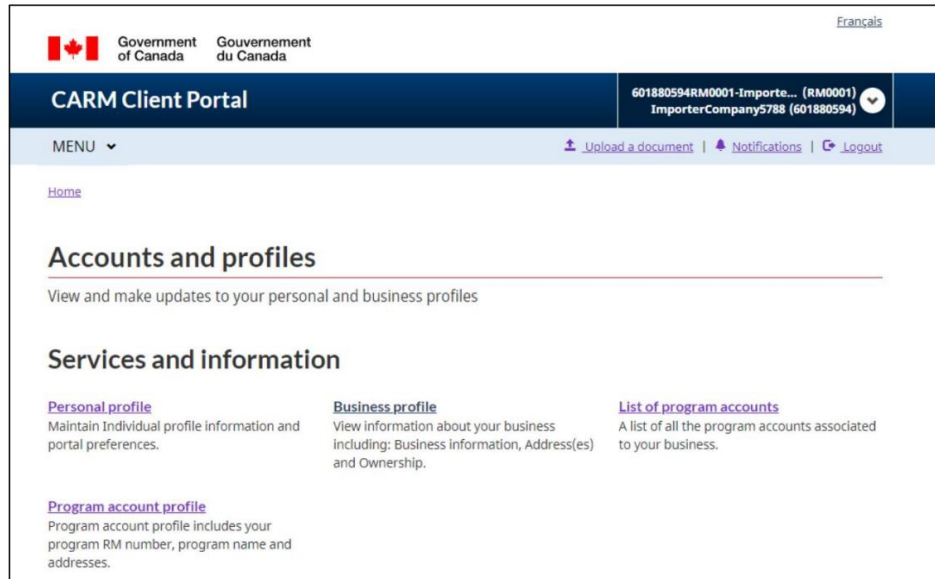
Manage the access of your employees to select clients/accounts, and review pending access requests.

Manage business relationships

Manage business relationships with clients and review access requests.

Manage client groups

Create and manage groups of clients, as well as employee access to select groups.



➤ Accounts and profiles

Personal profile

Contains information about your individual profile and portal preferences

Business profile

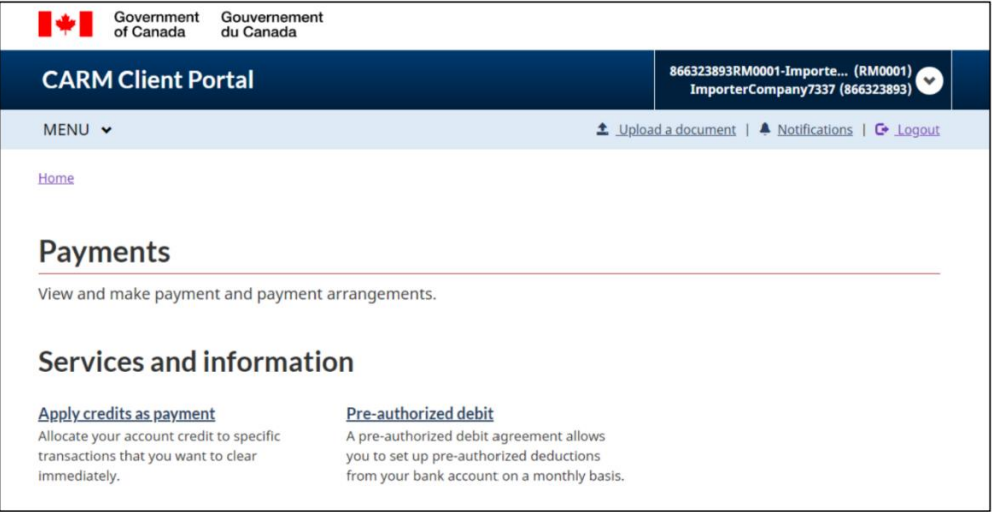
Contains relevant business information including address(es) and ownership

List of program accounts

Displays all program accounts associated with a business

Program account profile

Contains relevant program information, including RM number, program name, and addresses



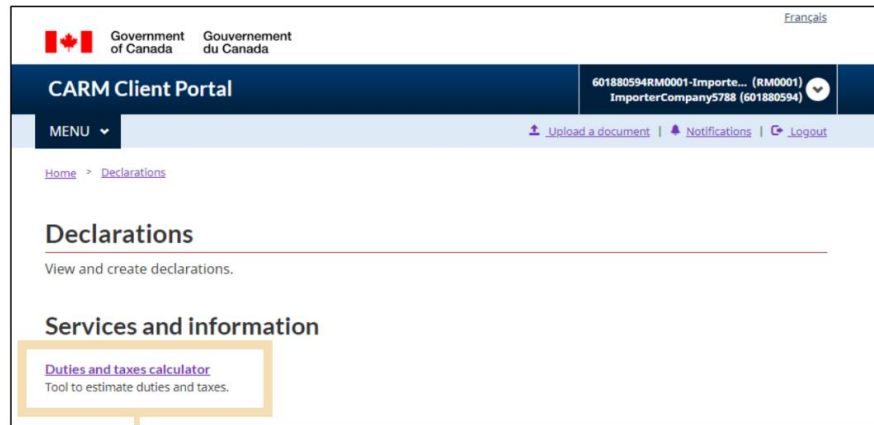
➤ **Payments**

Apply credits as payment

Allocate your account credit to specific transactions that you wish to clear immediately.

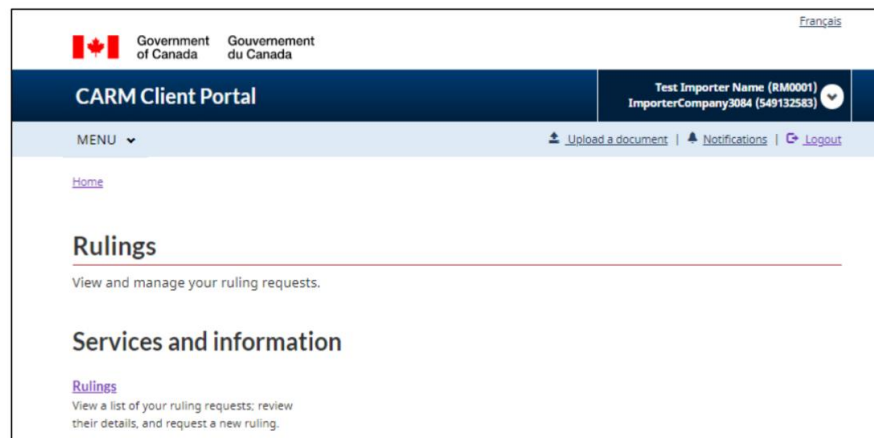
Pre-authorized debit

Allows you to set up pre-authorized deductions from your bank account on a monthly basis.



➤ Declarations

Duties and taxes calculator. This tool can be used for estimating the duties and/or taxes that will be owed for goods before they are imported.



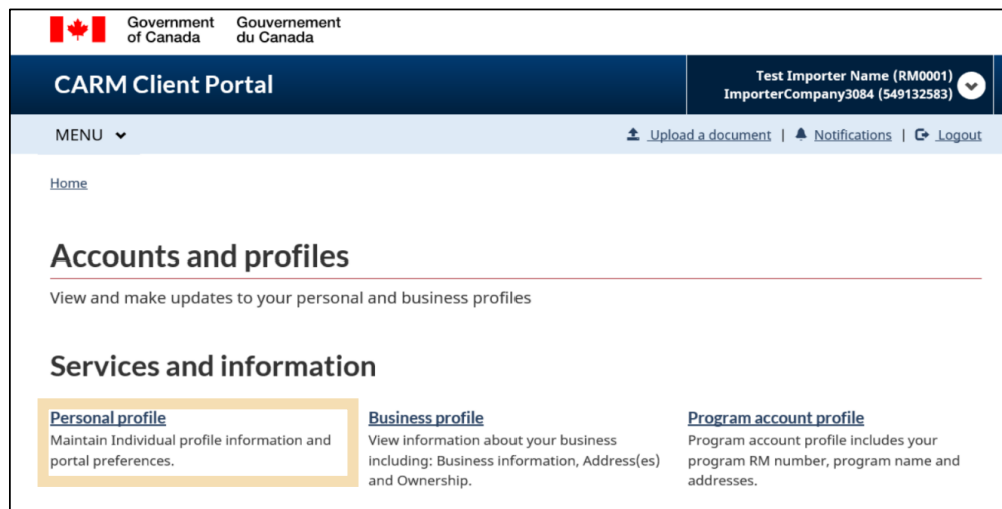
➤ Rulings

View and manage all of your ruling requests within the portal (review their details and request new rulings).

Registration process – Notifications

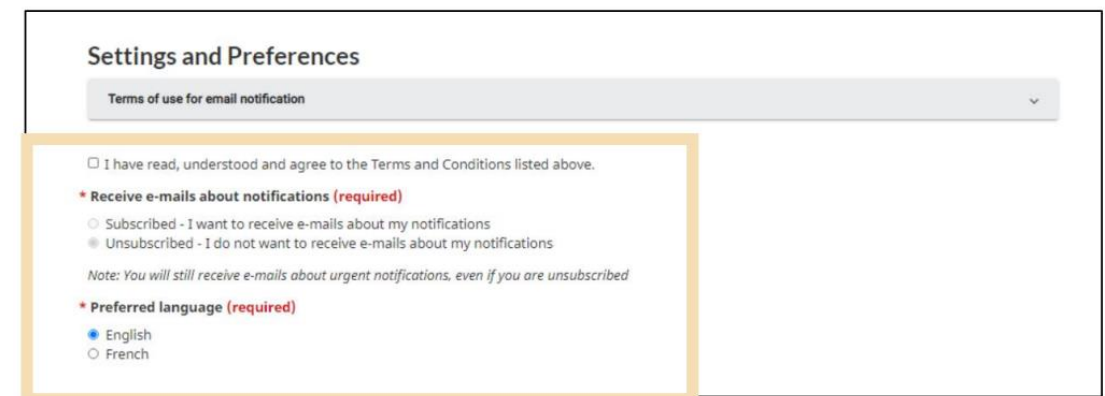
➤ Setup of notifications

Ensure that you do not miss important communications from the CBSA. To setup notifications, select **Accounts and profiles** from the home page.



1. From the Personal profile screen, scroll down to **Settings and Preferences** and complete the information:

Important Note: We strongly recommend you check the box Subscribed (email notifications).



2. To view your notifications in the CARM Client Portal, click the **Notifications** link. A list of notifications will display.

Franglais

Government of Canada / Gouvernement du Canada

CARM Client Portal

Test Importer Name (RM0001)
Importer Company 3084 (549132583)

MENU

Upload a document | Notifications | Logout

Last login: 2021-04-21 14:08 ET

[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](#)

[Payments](#)
Manage your payment options.

[Declarations](#)
View information about commercial account declarations (CAD).

Recent Transactions [View all transactions](#)

Transaction date	Description	Amount	Status
2021-03-09	Card Lot	\$ -1,000.99	Credit open
2021-03-09	Card Lot	\$ -3,000.99	Credit open
2021-03-09	Card Lot	\$ -2,000.99	Credit open
2021-03-05	Misc. Invoice (K23)	\$ 1,000.00	Receivable open

Most requested

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

Need assistance?



✓ **Sealion Cargo Support:**

- Contact your Account Manager so they can provide you with guidance.
- [Book an online meeting](#) to address CARM questions

- ✓ **Instructional Videos:** available on the [CBSA Website \(video gallery\)](#) and the [CBSA YouTube Channel](#).
- ✓ **CBSA Client Support Helpdesk:** Access to the [online form](#).