



CARM Client Portal

User Guide

Onboarding to the CARM Client Portal

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Purpose of this guide

This guide will explain the process for setting up individual and business accounts in the CARM Client Portal. This includes the detailed steps to be followed for accessing the portal either through a GCKey or Sign-In Partner, registering for multi-factor authentication and setting up user profile.

Important note:

It is important that users log in to the portal on a regular basis. For security purposes, user accounts created in the portal will be deactivated after 180 days of inactivity.

Audience

This guide is for users of the CARM Client Portal. If you are a [non-resident business](#) you must obtain your 9 digit business number (BN9) from the Canada Revenue Agency before proceeding with onboarding to the CARM Client Portal.

Preamble

The portal is the site that everyone involved in importing goods into Canada uses to do business with the Canada Border Services Agency (CBSA). Every user needs to be connected to a business. Every business needs to be enrolled in at least one CBSA program.

This user guide has instructions for both new users who have never done business with the CBSA before and for existing users who are already in one or more CBSA programs.

Contact

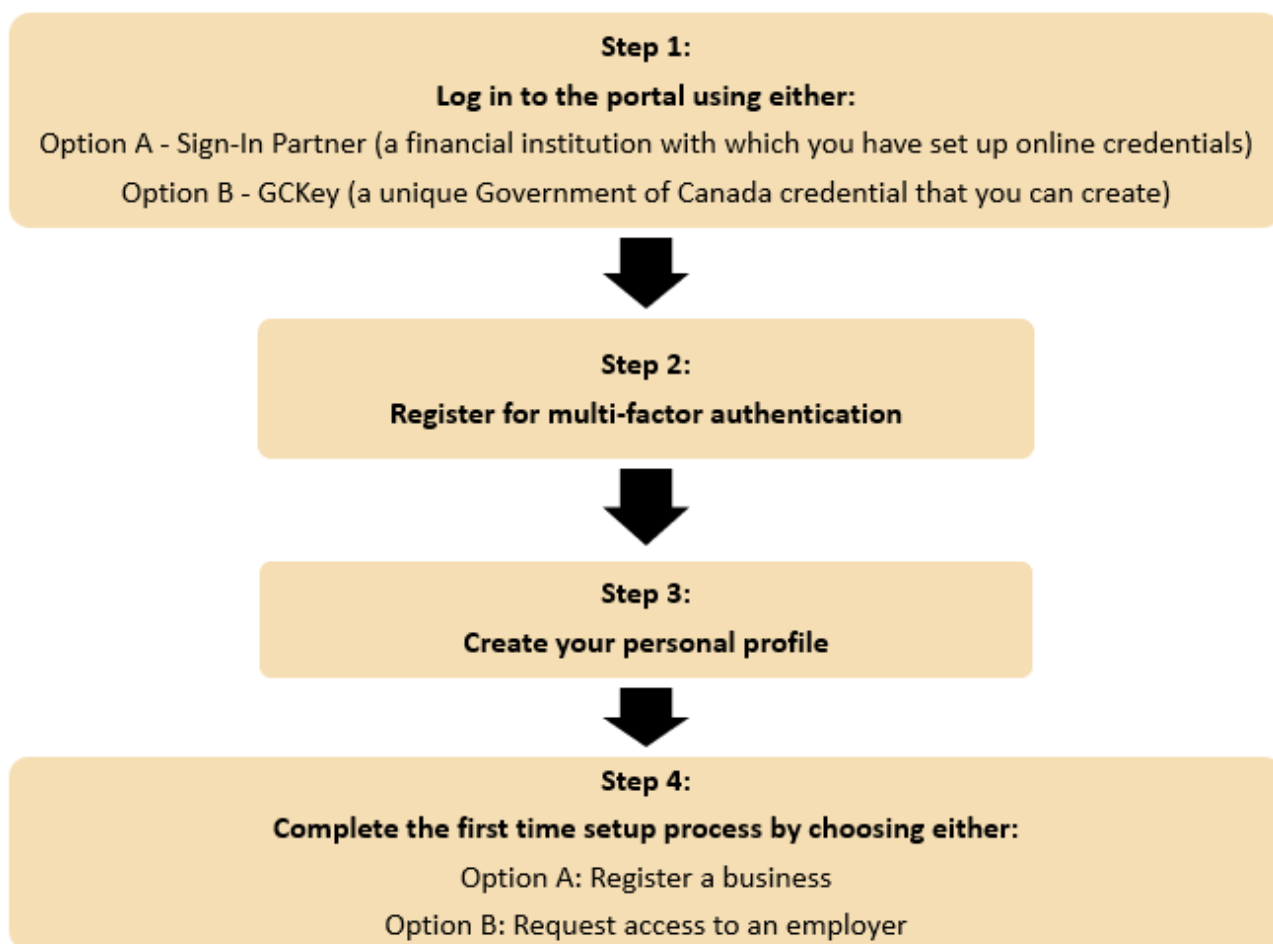
Contact the [CARM Client Support Helpdesk](#) if you need additional support.

1. Onboarding to the CARM Client Portal

1.1 Overview

The portal serves as the primary hub for accounting and revenue management with the CBSA.

To onboard to the portal, users will need to complete the following processes:



1.2 Accessing the CARM Client Portal

To access the portal, individuals must first open the CBSA webpage, the link to which can be found below:

[Click here to access the CARM Client Portal](#)

Upon launching the portal, you will see the homepage. This page has many resources available to you that do not require logging into your portal account.

Important note:

All trade chain partners (TCP) can begin onboarding to the portal by following the steps in this user guide. If you encounter problems, please contact the CBSA by filling out the [Client support contact form](#) or call 1-800-461-9999.

For **non-resident businesses** to obtain a 9 digit business number, you need to contact the Canada Revenue Agency's non-resident registration and security line by calling:

Within Canada: 519-252-4705

Toll free (Canada / United States): 1-866-453-0452

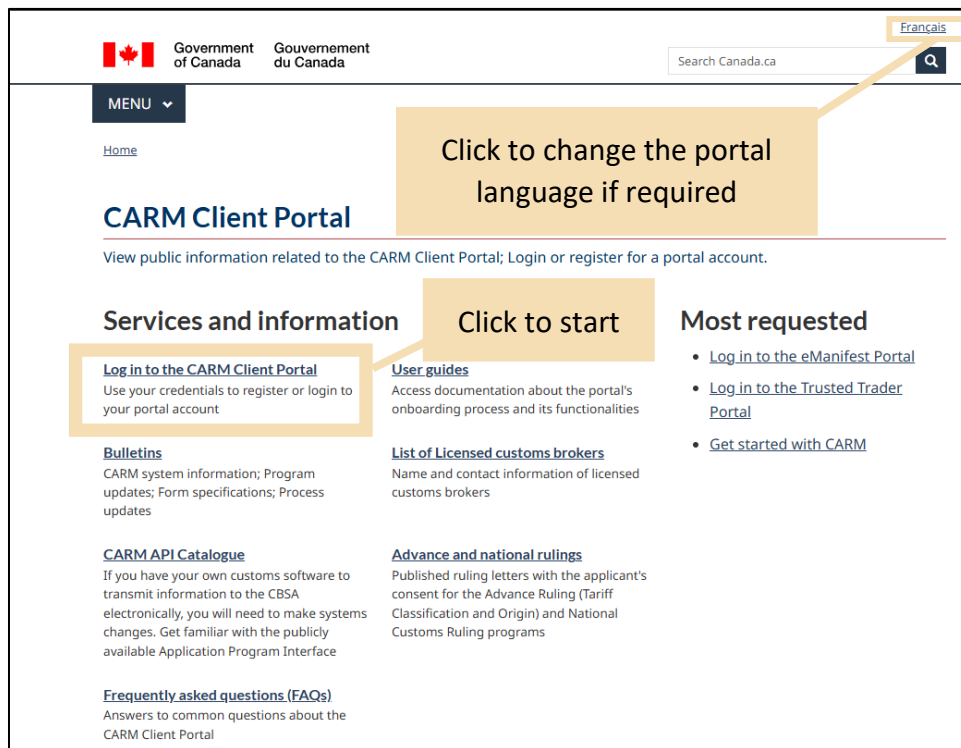
Outside Canada / United States call collect: 1-613-221-3039

Hours of service are Monday to Friday 8 am to 4:30 pm (EST).

Once you have obtained your business number you can refer to the First time set-up – Register my business user guide for guidance before registering your business on the CARM Client Portal and enrolling in a CBSA RM Program Account.

For more information, please visit [Register for or modify an import-export program account](#).

In order to create and/or access your portal account, go to the **Log in to the CARM Client Portal** link under **Services and Information**.



Note that in order to access all available features of the portal, individuals and businesses must first go through the initial setup process. Once you have selected the **Log in to the CARM Client Portal** link, you will be taken to the portal access page where you will be prompted to log in using one of the following options:

- Continue to Sign-In Partner
- Continue to GCKey

Steps for logging in using both methods are detailed on the following pages.

Curious to learn more about the CARM Client Portal Login process? Reference the following walkthrough video:

- [How to Create Login Credentials in the CARM Client Portal](#)



[Home](#) > [CARM Client Portal](#)

Access the CARM Client Portal

Option 1

[Continue to Sign-in Partner](#)

- Use the same sign-in information you use for other online services (for example, online banking).
- If you have a joint bank account, only one of the two people can register for CCP with the shared account. The second person must use a different Sign-In Partner account or create a GCKey account.
- None of your information (for example, financial, banking) will be shared with CBSA. Your Sign-In Partner will not know which government service you are using.
- You will temporarily leave the CBSA site to use your Sign-In Partner.

[▶ View list of Sign-In Partners](#)

Option 2

[Continue to GCKey](#)

- Sign-in with a GCKey user ID and password if you do not use one of the Sign-In Partners.
- Register for a GCKey user ID and password if you do not have one.
- Your GCKey user ID can be used to access other Government of Canada departments and agencies. GCKey user IDs created on other federal government sites can be used on CBSA.
- If you have forgotten an existing GCKey user ID you will need to create a new one.

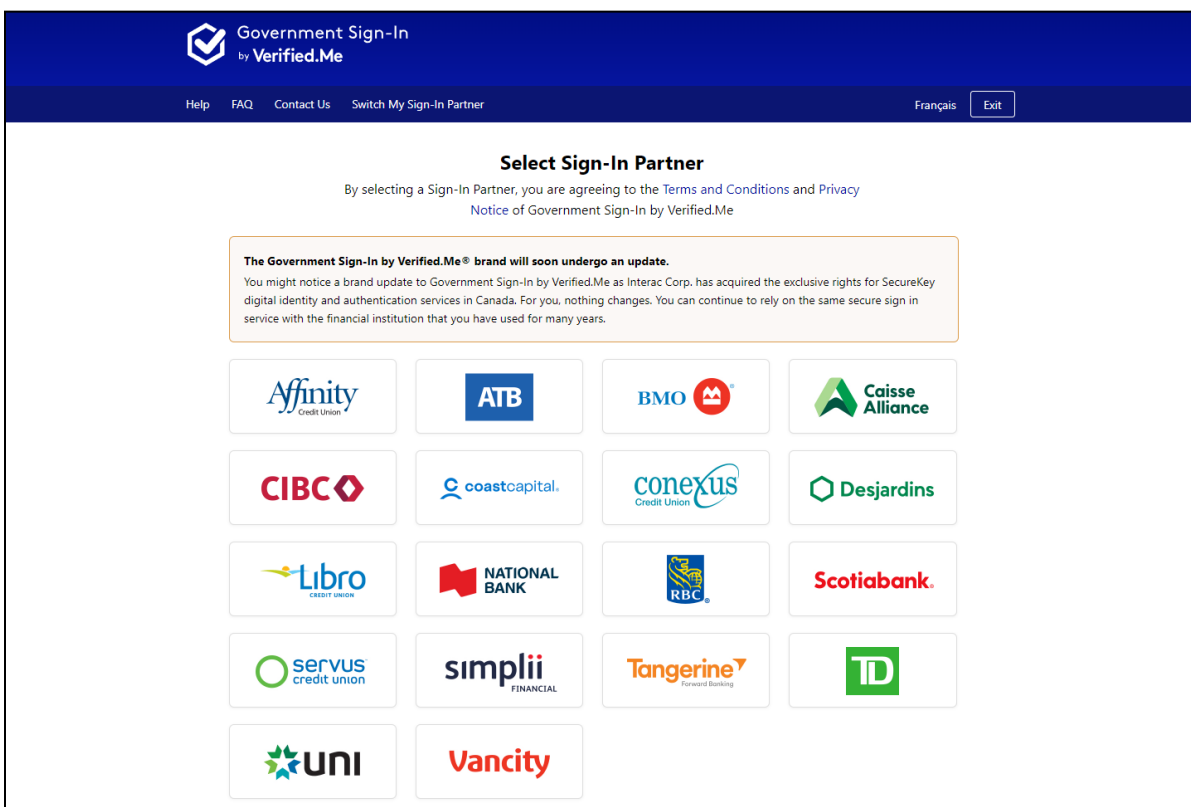
1.3 Logging in with a Sign-In Partner

The **Sign-In Partner** option allows users to log in through the web portal of their financial service provider. Sign-In Partners are financial institutions and banks that have partnered with SecureKey Technologies to enable their customers to use their online credentials to log in to other secure sites.

All individuals and businesses who use this option must have a pre-existing account with the selected partner.

After selecting your Sign-In Partner from the list of available institutions, you will be directed to the Partner's sign-in page to log in using your credentials.

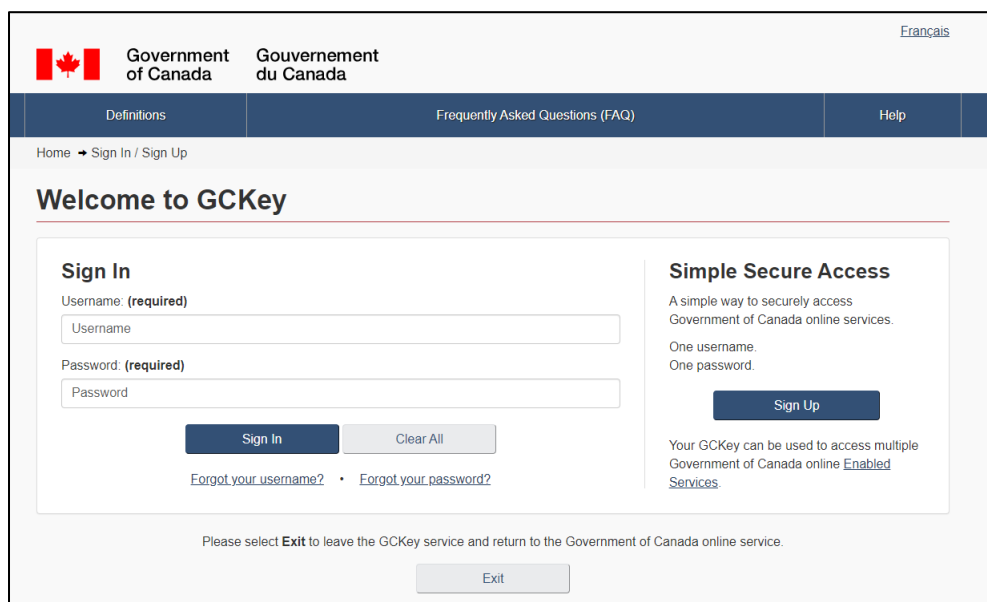
The full list of available Sign-In Partners can be found by clicking the following link: [List of Sign-In Partners](#)



1.4 Logging in using an existing GCKey

A GCKey is a unique credential that protects your communications with online Government programs and services.

On this page, you will have the option to sign in using an existing GCKey, or you may create a new one.



The screenshot shows the GCKey login interface. At the top, there is a header with the Government of Canada logo and name in English and French, a language toggle for 'Français', and navigation links for 'Definitions', 'Frequently Asked Questions (FAQ)', and 'Help'. Below the header, a breadcrumb trail reads 'Home → Sign In / Sign Up'. The main heading is 'Welcome to GCKey'. The 'Sign In' section contains fields for 'Username: (required)' and 'Password: (required)', each with a text input box. Below these fields are 'Sign In' and 'Clear All' buttons. Links for 'Forgot your username?' and 'Forgot your password?' are provided. To the right, the 'Simple Secure Access' section explains that GCKey is a simple way to securely access Government of Canada online services, requiring only one username and one password. It includes a 'Sign Up' button and a note that GCKey can be used to access multiple Government of Canada online services, with a link to 'Enabled Services'. At the bottom, a message states: 'Please select **Exit** to leave the GCKey service and return to the Government of Canada online service.' with an 'Exit' button.

Important note:

While you may use existing GCKey credentials from certain other Government of Canada portals, note that some exceptions (such as MyCRA) may apply. If this is the case, you will need to create a unique GCKey to access the CARM Client Portal.

1.5 Creating a new GCKey

To create a new GCKey, follow the steps below:

1. Click on the **Sign Up** button.

Home → Sign In / Sign Up

Welcome to GCKey

Sign In

Username: **(required)**

Password: **(required)**

[Forgot your username?](#) • [Forgot your password?](#)

[Sign In](#) [Clear All](#)

Simple Secure Access

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

One username.
One password.

[Sign Up](#)

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.

[Exit](#)

2. If you agree with the **Terms and Conditions of Use** after reading, click the **I accept** button to continue.

Home → GCKey Sign Up Step 1 of 5

[Terms and Conditions](#) [Username](#) [Password](#) [Questions and Answers](#) [Email](#)

Terms and Conditions of Use

In return for the Government of Canada providing you with a GCKey, you agree to abide by the [GCKey Terms and Conditions of Use](#) which includes the [Privacy Notice](#).

By selecting the **I accept** button, you have read and agree to the [GCKey Terms and Conditions of Use](#) which includes the [Privacy Notice](#). You can choose to not sign up for a GCKey by selecting **I decline** to end this process.

[I accept](#) [I decline](#)

3. Create your username as per the specifications provided in the **Username Checklist** and click the **Continue** button.

[Home](#) → GCKey Sign Up Step 2 of 5

Terms and Conditions Username Password Questions and Answers Email

Create Your Username

← Back

Your username must contain at least eight characters and be unique to you. 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.

Create Your Username: **(required)**

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

Continue Clear All Cancel

Privacy

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

Username Checklist

- Minimum 8 characters
- May contain:
 - Upper case letter(s)
 - Lower case letter(s)
 - French character(s)
 - Digit(s)
 - Special character(s)

4. Create your password as per the specifications provided in the **Password Checklist** and click the **Continue** button.

[Home](#) → GCKey Sign Up Step 3 of 5

Terms and Conditions Username Password Questions and Answers Email

Create Your Password

← Back

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.

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

Privacy

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

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

Important note:

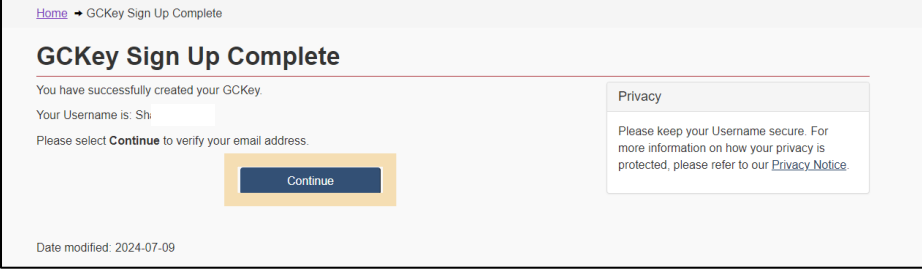
Throughout each step of this process, some indications will be provided at the right side of the screen (for example username and password checklists, recovery questions and answers guidance). It is important you pay attention to these.

5. Create your recovery questions and click the **Continue** button.

The screenshot shows a web form titled "Create Your Recovery Questions, Answers and Hints" with a "Back" link in the top right. The form is divided into two main sections. The left section contains several input fields: a dropdown menu for "Select a Recovery Question: (required)" with the placeholder "Please select a question..."; a text input for "My Recovery Answer: (required)"; a text input for "My Memorable Person: (required)"; a text input for "My Memorable Person Hint:"; a text input for "My Memorable Date (YYYY-MM-DD): (required)"; and a text input for "My Memorable Date Hint:". Below these fields is a note: "Please select **Continue** to proceed or click **Cancel** to end the Sign Up process." At the bottom of this section are three buttons: "Continue" (highlighted in blue), "Clear All", and "Cancel". The right section contains two informational boxes. The top box, titled "Privacy", states: "Please keep your Recovery Question, Answers and Hints secure. For more information on how your privacy is protected, please refer to our [Privacy Notice](#)." The bottom box, titled with an information icon, states: "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 (?)." The entire form is enclosed in a light gray border.

Next, there is an **Option Account Recovery** step which will help you with recovering your username and password, via your email. Either fill in your email and click the **Continue** button to receive a one-time code or click on **Skip**.

6. Click the **Continue** button on the confirmation page to finalize the process.



The screenshot shows a web page titled "GCKey Sign Up Complete". At the top left, there is a breadcrumb trail: "Home" followed by a right-pointing arrow and "GCKey Sign Up Complete". Below this, the main heading "GCKey Sign Up Complete" is displayed. The page content includes the message "You have successfully created your GCKey.", followed by "Your Username is: Sh" (where "Sh" is partially obscured by a grey box). Below that, it says "Please select **Continue** to verify your email address." A blue button with the text "Continue" is highlighted with a yellow rectangular border. To the right of the main content area, there is a "Privacy" section with the text: "Please keep your Username secure. For more information on how your privacy is protected, please refer to our [Privacy Notice](#)." At the bottom left of the page, it says "Date modified: 2024-07-09".

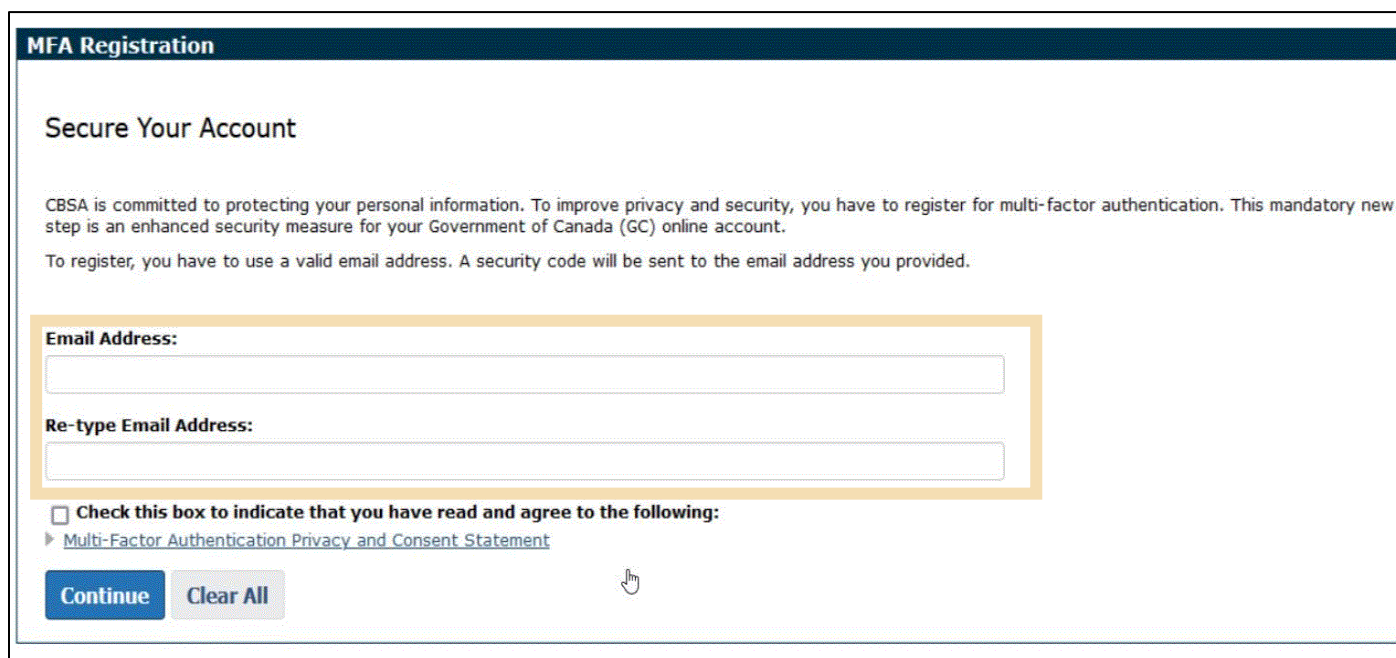
If you did fill in the email recovery option, you will see the **Email Recovery Complete** message and will need to click on **Continue**. Then you will see a **Welcome** page and will be asked to click on **Continue** to return to the Government of Canada online services.

1.6 Registering for 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.

To use the portal, you will automatically be prompted to register for multi-factor authentication if you have not previously completed the registration process.

1. On the multi-factor authentication registration page, enter your email address in the fields provided:

The screenshot shows the 'MFA Registration' page with the heading 'Secure Your Account'. It contains explanatory text about CBSA's commitment to security and a requirement to register for multi-factor authentication. Below this, there are two input fields for 'Email Address' and 'Re-type Email Address', which are highlighted with a yellow border. At the bottom, there is a checkbox for agreeing to the terms, a link to the 'Multi-Factor Authentication Privacy and Consent Statement', and two buttons: 'Continue' and 'Clear All'.

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**

Important note:

Multi-factor authentication for the portal only uses email at this time. Multi-factor authentication passcodes cannot be sent by text message.

2. Check the box to indicate that you have read and that you agree to the multi-factor authentication privacy and consent statement. It is recommended that you click the link below it to read it first. Then, click **Continue**.

☒ **Check this box to indicate that you have read and agree to the following:**

[Multi-Factor Authentication Privacy and Consent Statement](#)

CBSA is committed to protecting your personal information. To improve privacy and security, you have to register for a multi-factor authentication.

This mandatory new step is an enhanced security measure against an unauthorized access to your business account associated with the commercial portal(s).

You have to provide a valid email address, which will be shared with a third party (2Keys), so they can send you an email with a security code for the second factor authentication.

If you:

- have read the above statement completely,
- understand that Canada Border Services Agency will protect your personal information in accordance with the Privacy Act,
- understand that your personal email address will only be used for sending you the security code by 2Keys for in-transit data transmission,
- your email address will not be permanently stored by 2Keys once the security code is sent, rather your email address will be deleted permanently,
- allow Canada Border Services Agency to disclose your personal email information to 2Keys, and
- you would like to proceed with the MFA registration,

please check the box above.

Note: As a consequence of withholding the consent, you will not be able to access the commercial portal(s).

3. Check your email for a one-time passcode. The passcode is a **six-digit number**.

Verify Your Login

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

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>

4. Enter this passcode in the **Security Code** field. Then, click the **Submit** button.

Important note:

If you receive an email with a passcode and you did not try to log into the portal, it might mean that your GCKey or Sign-In Partner password has been compromised. You should investigate and if necessary, change your password.

Important note:

The multi-factor authentication passcode changes each time you try to log in to the portal, and each time you press the **Resend** button. Always use the most recent multi-factor authentication passcode that was sent to you.

Important note:

Some e-mail domains, especially company domain names, are taking longer to receive the email with the one-time passcode. This delay is causing the passcode to be received outside of the validity period which renders it invalid.

If you are receiving your passcode outside of the range of validity and then an expired passcode reject thereafter, please have your company IT department review this information and have the following email address be recognized as trusted if possible:

CBSA-ASFC@auth.canada.ca

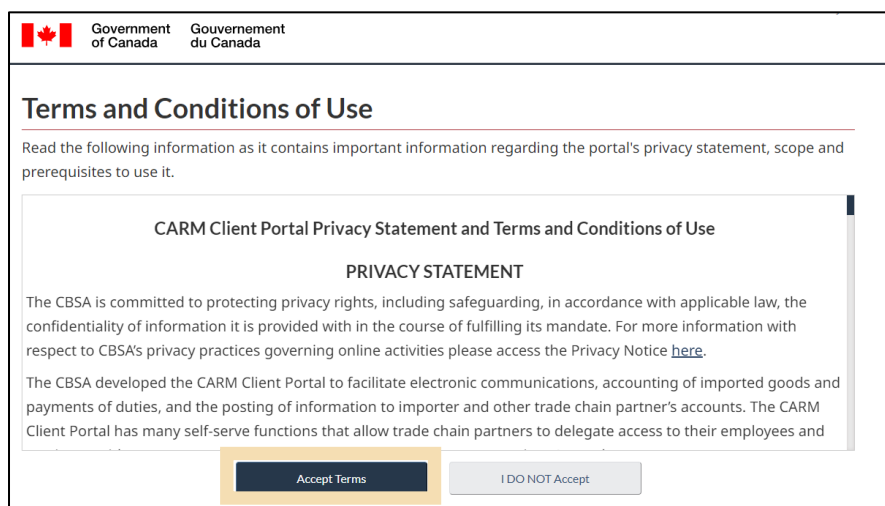
Otherwise, update the email address that you have registered with to a different email address (for example, an email address not linked to the company).

5. The registration screen will inform you of successful registration for multi-factor authentication.



If you click **Change MFA email**, you will need to repeat this process. If you click **Continue to CARM Client Portal**, you will be taken to the **Terms and conditions of use** page.

6. Click the **Accept Terms** button to continue.



Important note:

If you encounter challenges using the multi-factor authentication, review the [Multi-factor Authentication Help for Secure Online Services](#) page for more information.

If, after reviewing the information, you are still having issues, contact [CARM Client Support Helpdesk](#) using the **Client support** link on the CARM webpage.

1.7 Creating your personal profile

When you first log in to the CARM Client Portal (using either the **Sign-In Partner** or **GCKey** option), you will be prompted to create your personal profile. Your personal profile contains your contact details, as well as settings and preferences.

The screenshot shows a web form titled "Personal profile". Below the title is a subtitle: "Personal profile includes contact details and preferences for using the portal." There is a blue "Important" banner with a circular icon and the text: "Keep your personal profile up to date. Your contact details will be used to communicate important updates." The form is divided into two main sections: "User information" and "Contact Information". The "User information" section contains two required fields: "First Name (required)" and "Last Name (required)". The "Contact Information" section contains a "Telephone number (including area code) (required)" field with a dropdown menu, an "Extension" field, an "Email address (required)" field, and a "Confirm e-mail address (required)" field. The form is enclosed in a light orange border.

- To learn more about subscribing to email notifications, see [Section – Setup of notifications](#).
- While using this portal, you must fill in each line that has a red asterisk (*).
- Click on every drop down arrow that you see and select the best option for your situation.

Note that you will be able to update this information in your Account Settings at a later time if required.

Once you have added your personal information and have identified your preferences for notifications and preferred language, you will be prompted to create security questions and answers for subsequent identity verification attempts. Click **Save Changes**.

Security questions

Your selected questions and answers will be used for identity verification when calling the CBSA phone support in regards to activities on this account.

* Question 1 (required)

Select a question

* Answer 1 (required)

* Question 2 (required)

Select a question

* Answer 2 (required)

* Question 3 (required)

Select a question

* Answer 3 (required)

Save Changes

Cancel

1.8 Register my business

The business must be registered on the CARM Client Portal in order to continue.

Registering a business 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.

It is important to note that 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. A business account can only be registered once, but its Business Account Manager can assign other users a BAM role (or other user roles) through the employee management page.

See the user guide [First time set-up – Register my business scenarios](#) for explanations of the different situations that can occur for businesses when registering on the CARM Client Portal (CCP) for the first time.

The portal is very specific, depending on the various situations for both resident businesses and non-resident businesses. There are 5 general scenarios that are explained.

- Scenario 1 – Business has no BN9 and no CBSA program account
- Scenario 2 – Business has BN9 but no CBSA program account
- Scenario 3 – Business has BN9 and has an active RM
- Scenario 4 – Business has BN9, no RM, and has another CBSA program account
- Scenario 5 – Business has no BN9, no RM and has another CBSA program account

Finding the correct business scenario before registering the business on the CARM Client Portal is very important to avoid complications and delays with this registration process.

If you are an employee and want to find a business already registered on the CARM Client Portal, see section 1.9.

1.9 Employees requesting access to a business number

If you are accessing the CARM Client Portal for the first time, you must first complete Sections 1.2 to 1.7 listed above. In order to request access to your employer, you must type in the business number in **Find a business** then click on **Search**, under the **Request access to my employer** section.

If clicking on Search in the below screen presents an error *EC 1004: Business not found*, ask your employer to complete the **Register my business** process. Please refer to the user guide [First time set-up – Register my business scenarios](#).

First time setup

Important

Please choose option according to the action you require. Select **Create business portal account** if the business is not yet setup on the CARM Client Portal. Select **Request access to my employer** if the business portal account has been setup and you require access to the account. The business account manager is responsible to action your employee request.

Create business portal account

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](#)

Request access to my employer

Choose this option if your employer has created the business account and you require access to it. **Do not** select this option if you are attempting to create the business account.

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

Find a business

* Business number (BN9) (required)

Employees will be asked to enter the **Business Number (or BN9)**, provide a reason **why you need access** and click on **Request Access**.

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
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.

An **Access Request** message will popup to confirm that your request was successfully submitted.

Request access to my employer

You have submitted an access request to your employer. See the details below.

Request details

Business requested
THE I
(121)

Request date
2024-10-28

Request comments
testing for screenshots

Manager response

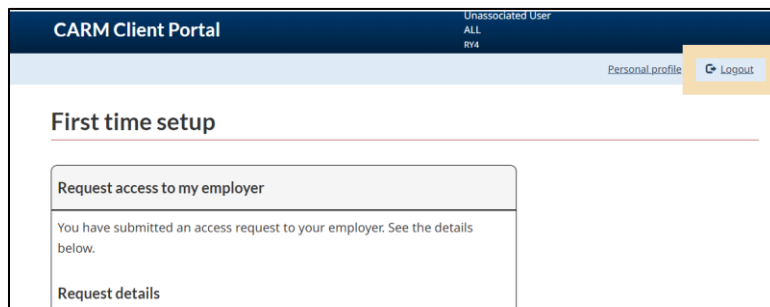
Status
Pending

Comments from manager
No comments

Access Request
×

Your access request has been successfully submitted.

Logout of the CARM system and inform your employer that this request is completed. After they accept your request, the next time you log into the CARM Client portal, you will be on your business homepage.



Curious to learn more about linking your Individual User Account with your Business Account? Click the link below to access the following step by step walkthrough video:

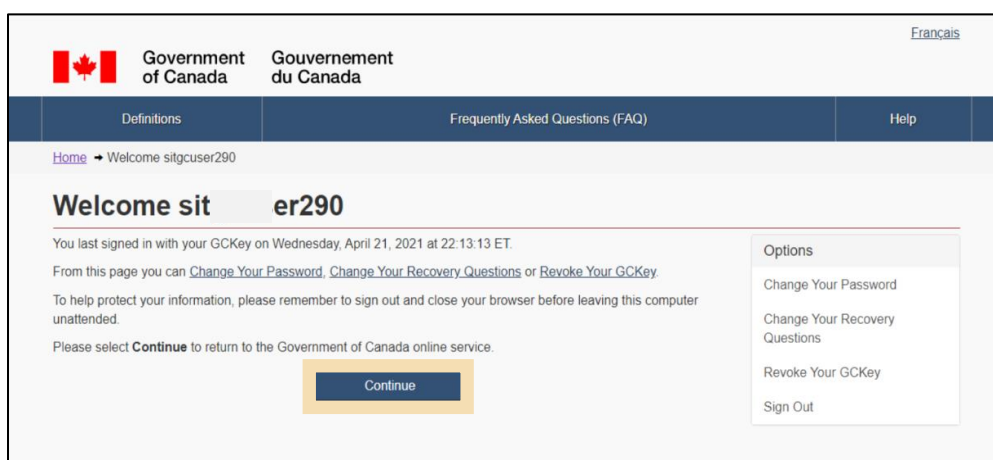
- [How to connect a user account to a business account](#)

If your employer would like to learn more about the role of the Business Account Manager as well as the Delegation of Authority process, please refer to the [User guide – Delegation of Authority](#).

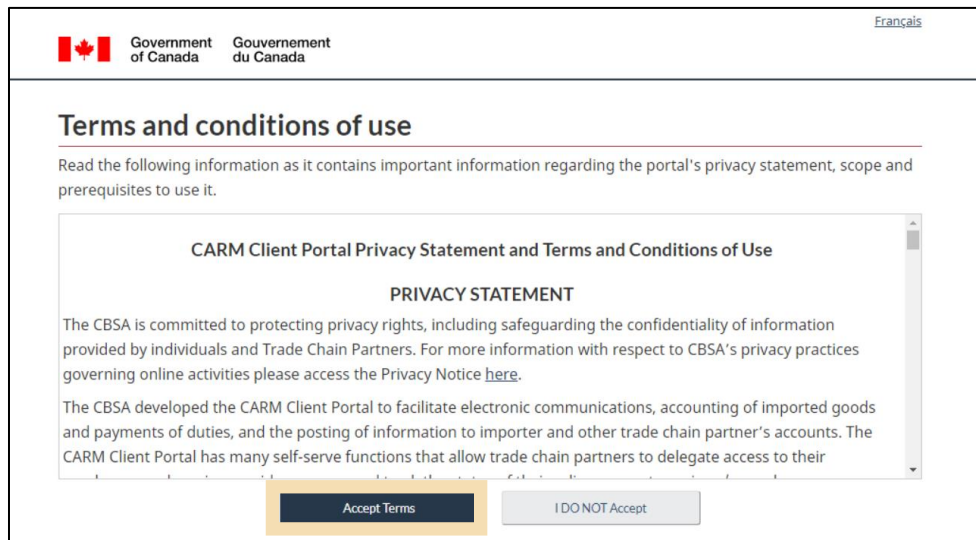
2. Basic navigation and features of the CARM Client Portal

2.1 Login navigation and features

For GCKey users, a successful login page is displayed prior to reaching the CARM Client Portal home page. As a GCKey user you will be shown a standard welcome message that details your last sign in date, as well as a few links through which you can change your password, change your recovery questions, or revoke your GCKey.



Once you click the **Continue** button on the GCKey welcome page, you will be directed to the **Terms and Conditions of Use** screen of the CARM Client Portal.

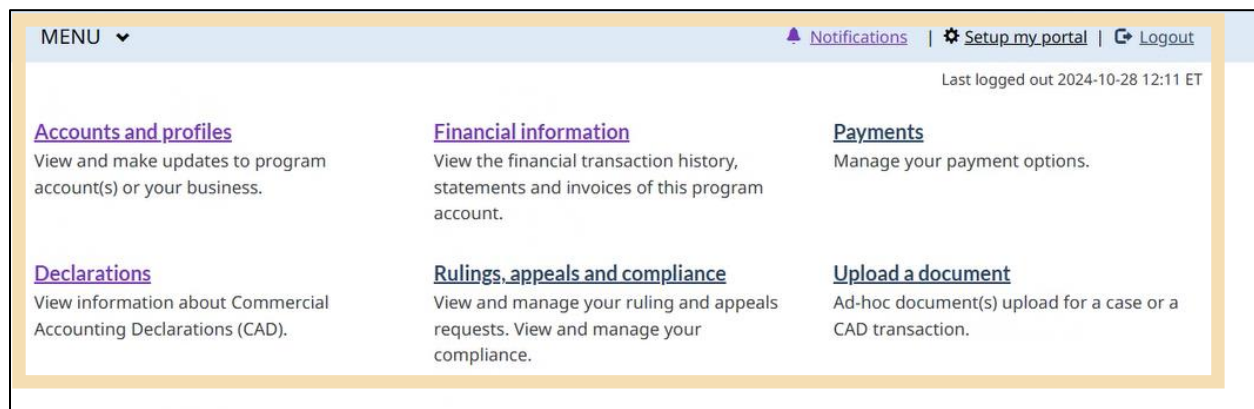


These terms and conditions of use will be displayed every time you log in to the CARM Client Portal. It is important that you read and understand these fully prior to proceeding.

- Selecting the **Accept Terms** button will take you to the CARM Client Portal home page.
- Selecting the **I DO NOT Accept** button will cancel the process.

2.2 Functions available on the home page

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.



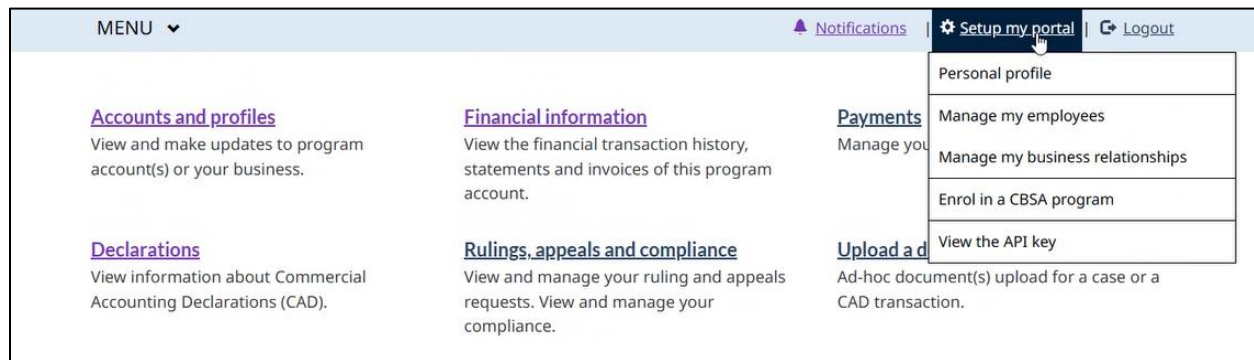
Alternatively, each of these pages can also be accessed by selecting them from the drop-down **MENU** located on the top left of the home page.

Additional information about these functions is outlined in further detail on the following pages.

1. Setup my portal

This link will direct you to the **Setup my portal** landing page. From this page, you will be able access the following options:

- **Personal profile**
- **Manage my employees**
- **Manage my business relationships**
- **Enrol in a CBSA program**
- **View the API key**



To learn more about the management of employees and clients, please reference the following guide:

- [User guide – Delegation of Authority](#)

2. Accounts and profiles

This link will direct you to the **Accounts and profiles** landing page. From this page you will have the ability to view and/or make updates to your profiles through the following links:

- **Business profile**
- **Program account profile**
- **List of program accounts**

[Home](#)

Accounts and profiles

View and make updates to program account(s) or your business.

Services and information

[Business Profile](#)

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

[Program account profile](#)

Program account profile includes your program RM number, program name and addresses.

[List of program accounts](#)

View and manage the list of program accounts for your business.

Version 3.0.2 - 5460 4126

3. Financial information

This link will direct you to the **Financial information** landing page. From this page you will have the ability to view detailed information about your account history, statements, and invoices through the following links:

- **Transaction History**
- **Statement of account**
- **CBSA Invoices**
- **Collection letter**
- **Financial security**
- **Late payment interest simulation**

[Home](#)

Financial information

View the financial transaction history, statements and invoices of this program account.

Services and information

Transaction history View a live history of transactions, review the account balance and make payments.	Statement of account Monthly summary of your business activities with the CBSA.	CBSA invoices Invoices billed to you by the CBSA.
Collection letters Notifications of overdue payments.	Financial security Post new bonds, view and monitor existing bonds.	Late payment interest simulation Simulate interest payments for a specified timeframe, review interest rates and interest calculations.

4. Payments

This link will direct you to the **Payments** landing page. From this page you will have the ability to view and make payments and payment arrangements through the following links:

- **Allocate credit as payment**
- **Pre-authorized debit**
- **Payment arrangement**
- **Online payment**

[Home](#)

Payments

View/make payments and payment arrangements.

Services and information

[Allocate credit as payment](#)

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

[Pre-authorized debit](#)

Set up pre-authorized deductions from your bank account on a monthly basis.

[Payment arrangement](#)

View or manage a promise to pay agreement

[Online payment](#)

Make an online payment using a credit card, Visa debit card, or Mastercard debit card.

To learn more about financial information, processes, and payments, please reference the following guide:

- [User guide – Financial information, payment processing and tariff tools in the CARM Client Portal](#)

5. Declarations

This link will direct you to the **Declarations** landing page. From this page you will have the ability to view, create, manage and make requests through the following links:

- **Duties and taxes calculator**
- **Create a declaration**
- **List of submitted declarations**
- **Manage my templates**
- **Statements of adjustment and appeals**
- **Request declaration report**
- **View list of requested declaration reports**

[Home](#)

Declarations

i Please note that this Landed-Cost Calculator does not consider the United Kingdom Tariff (UKT) that was recently introduced as part of the *Canada-United Kingdom Trade Continuity Agreement*, that came into force on April 1, 2021. This tool will be updated to include the UKT in the coming weeks.

View and create declarations.

Services and information

Duties and taxes calculator Tool to estimate duties and taxes.	Create a declaration Create a declaration; View the list of releases requiring your attention.	List of submitted declarations View your submitted Commercial Accounting Declarations (CAD), mass adjustments, records of intent, duty drawbacks and temporary importations.
Manage my templates Manage and view your saved templates for CAD, vendor and goods.	Statements of adjustment & appeals View all your statements of adjustment and initiate an appeal for a trade, SIMA or pre-CARM decision.	Request declaration report Request a custom report of your declarations (including B3s).
View list of requested declaration reports View and manage the list of declaration report requests.		

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



Government
of Canada

Gouvernement
du Canada

Français

CARM Client Portal

601880594RM0001-Importe... (RM0001)
ImporterCompany5788 (601880594)

MENU

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

[Home](#) > [Declarations](#)

Declarations

View and create declarations.

Services and information

[Duties and taxes calculator](#)
Tool to estimate duties and taxes.

Duties and taxes calculator

We offer this duties and taxes calculator as a self-help tool for your use. This tool does not replace professional advice. We cannot guarantee that this calculator will apply in your specific situation. For example, goods that are subject to various exceptions may require additional calculations beyond the scope of this tool to properly estimate for duties and taxes.

All results are given as examples only.

Customs

Summary

 How to use this tool

1. Customs

Provide the customs details of a single commodity (see classification number) for your simulated importation. All fields are based on today's available tariffs.

* Classification number (required) 

[Help me classify](#)

Validate my input

Selecting the **Help me classify** button within the **Duties and taxes calculator** will direct you to an embedded classification tool. This tool will allow you to input known information about your goods/products in order to receive a tariff classification number for the goods.

31

Help me classify

Describe Your Product

The more information you provide about your product, the better.

For best results, describe your item first, then insert a comma and add additional attributes. For example: "Peas, Frozen"

You can also search by HS code, by entering the number (or part of the number) directly into the product description field. For example: "6201.11"

Finally, chemical substances can be searched both by proper name (e.g. 'Calcium Perchlorate') and by CAS number. To search by CAS number, type 'CAS' followed by the number in the product description field. For example: "CAS 13477-36-6"

For additional hints, please consult the Help files.

eg: Frozen Durian

Cancel

Additional information about the Duties and taxes calculator, and the classification tool can be found in both the below document and the below video:

- [User guide – Financial information, payment processing and tariff tools in the CARM Client Portal](#)
- [Video – How to use the Duties and taxes calculator in the CARM Client Portal](#)

6. Rulings, appeals and compliance

This link will direct you to the **Rulings, Appeals and compliance** landing page. From this page, you will be able to view and manage all of your ruling requests within the following links:

- **Rulings**
- **Appeals**
- **Enforcement actions**
- **Disenrolment and compliance**

[Home](#)

Rulings, appeals and compliance

View and manage your ruling and appeals requests. View and manage your compliance.

Services and information

[Rulings](#)

View a list of your ruling requests; review their details, and request a new ruling or appeal

[Appeals](#)

View a list of your submitted appeals; review their details and status.

[Enforcement actions](#)

View a list of enforcement actions issued by the CBSA; read the letter; and request an appeal.

[Disenrolment and compliance](#)

View a list of compliance reports issued by the CBSA; read the report; and provide feedback

Additional information about rulings processes can be found in the below document and the below videos:

- [User guide – Managing Rulings](#)
- **Video – [Understanding Ruling statuses in the CARM Client Portal](#)**
- **Video – [How to submit a Ruling request in the CARM Client Portal](#)**

7. Upload a document

This link will direct you to the **Upload a document** landing page. From this page, you will be able upload and manage your files within the portal:

[Home](#)

Upload a document - Step 1 of 2

Select the category and type of document (if applicable) for upload, and enter the associated case number, transaction number or reference number.

* **Category (required)** ⓘ

Select a category ▼

* **Type (required)**

Select a type ▼

* **Case number (required)** ⓘ

Cancel

Next ➔

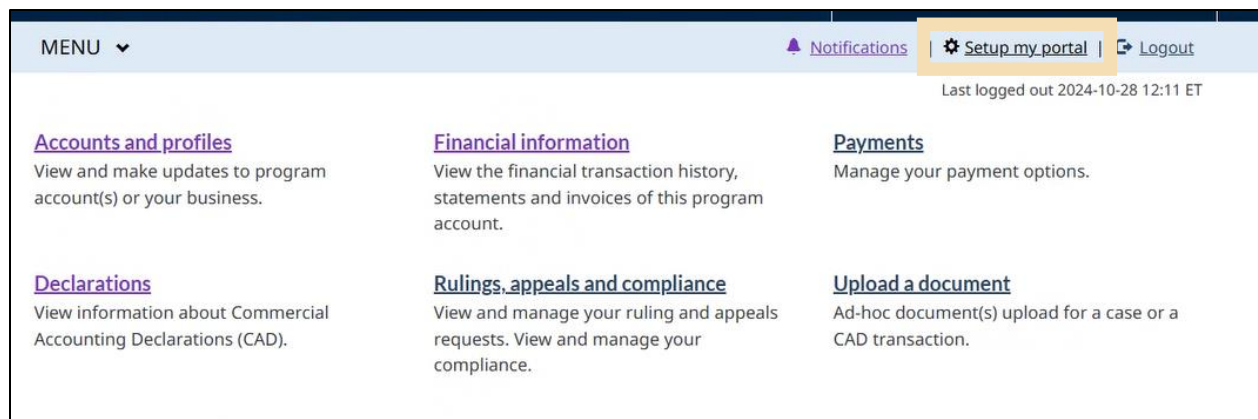
2.3 Setup of notifications

Setting up notifications within the CARM Client Portal is a useful way to ensure that you do not miss important communications from the CBSA.

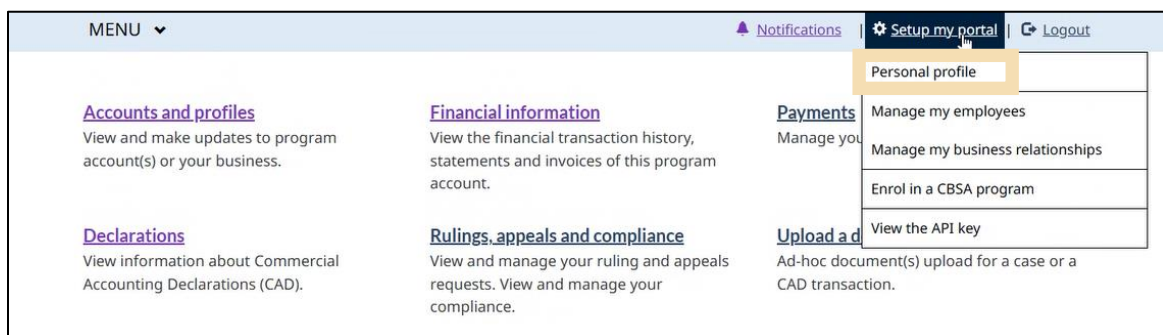
Note that even if you do not subscribe to all notifications, **you will still be notified if important communications that require timely action on your part are received.**

To setup notifications, follow the below steps:

1. Select **Setup my portal** from the home page.



2. Click on the **Personal profile** link.



3. From the **Personal profile** screen, scroll down to **Settings and Preferences** and complete the following:
- Read the **Terms and Conditions** in the drop-down menu, and confirm your acceptance by checking the box
 - Select the **Subscribed** button
 - Select **English** or **French** as your preferred language

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

Once notifications are set to **Subscribed**, you will begin receiving e-mail notifications from CBSA.

Important note:

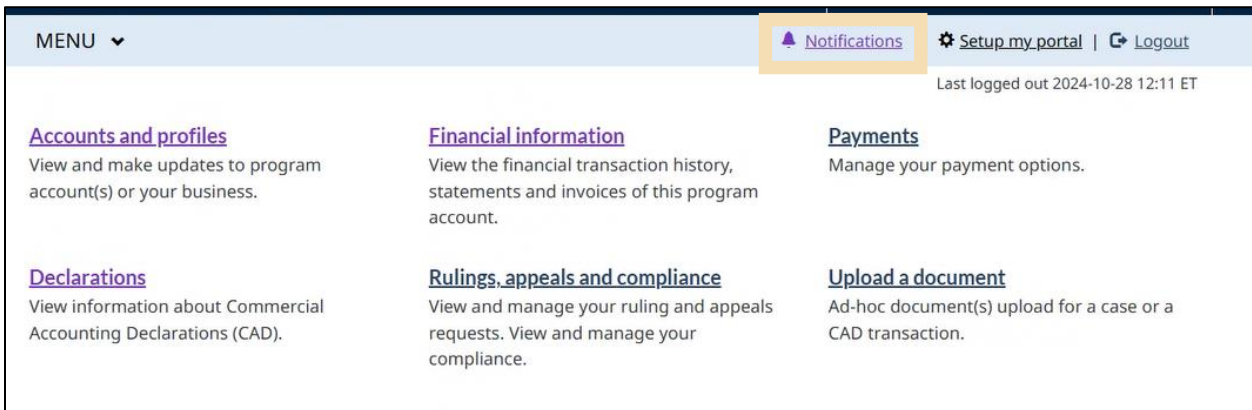
Notifications will be sent in bulk by CBSA. The only options available to users will be to either receive all notifications or to receive none. This option can be modified at any time following the above process.

Remember that urgent notifications will be sent to you regardless of the notification option selected.

2.4 Notifications (view)

To view your notifications in the CARM Client Portal, follow the below steps:

1. Click the **Notifications** link. A list of notifications will display.



- Click on the **Subject** link to view the details of a notification.

MENU

[Notifications](#) | [Setup my portal](#) | [Logout](#)

[Home](#)

Notifications

Search and read the notifications received from the CBSA.

Filter

Recipient

Account Number

Category

Type

Date range

CON

All

All

All

All

Apply

Clear

Date posted	Recipient	Account number	Type	Subject
2024-10-27	CONS...	8	IRM0001	RPP Limit Exceeded
2024-10-25	CONS...	8	IRM0001	Financial Security Che...
2024-10-25	CONS...	8	IRM0001	CAD Submission
2024-10-25	CONS...	8	IRM0001	Release submission
2024-10-25	CONS...	8	IRM0001	Statement of Account
2024-09-25	CONS...	8	IRM0001	Statement of Account
2024-08-25	CONS...	8	IRM0001	Statement of Account
2024-07-25	CONS...	8	IRM0001	Statement of Account
2024-06-25	CONS...	8	IRM0001	Statement of Account
2024-05-25	CONS...	8	IRM0001	Statement of Account

Items per page: 10

1 to 10 of 44

< >

Page 1 of 5

>

3. The notification details selected will then be displayed. Click the **Back** button to return to the notifications list once you are done reviewing the notification.

The screenshot displays the CARM Client Portal interface. At the top, there is a header with the Government of Canada logo and the text "Government of Canada" and "Gouvernement du Canada". On the right side of the header, there is a language selector for "Français". Below the header, there is a dark blue navigation bar with the text "CARM Client Portal" on the left and user information on the right: "Test Importer Name (RM0001)" and "ImporterCompany3084 (549132583)". Below the navigation bar, there is a light blue bar with a "MENU" dropdown on the left and links for "Notifications", "Setup my portal", and "Logout" on the right. The main content area has a breadcrumb trail "Home > Notifications" and a section titled "Notifications details". Inside this section, there is a grey box containing the following text: "Access permission(s) changes", "Recipient: ImporterCompany3084", "Type: Delegation changes - Client", and "Date posted: 2021-04-08". Below this box, there is a message: "Access for 227889992 to 549132583RM0001 has been successfully changed." At the bottom of the page, there is a yellow button labeled "Back".

2.5 Uploading documents

Including additional documents helps the CBSA with their rulings decisions. Where possible, documents that support a ruling request should always be included with the initial request. If the CBSA feels that they have insufficient information to render a decision, they may request that you provide additional information in order to proceed with your ruling request.

MENU ▾

[Notifications](#) | [Setup my portal](#) | [Logout](#)

Last logged out 2024-11-15 11:07 ET

[Accounts and profiles](#)
View and make updates to program account(s) or your business.

[Financial information](#)
View the financial transaction history, statements and invoices of this program account.

[Payments](#)
Manage your payment options.

[Declarations](#)
View information about Commercial Accounting Declarations (CAD).

[Rulings, appeals and compliance](#)
View and manage your ruling and appeals requests. View and manage your compliance.

[Upload a document](#)
Ad-hoc document(s) upload for a case or a CAD transaction.

Recent transactions ⓘ [View all transactions](#)

Transaction date	Description	Amount	Status
2024-11-13	Payment Lot	\$-693.37	Paid
2024-10-31	Payment Lot	\$-529.93	Paid
2024-10-23	Assessment (B3)	\$7,171.77	Open
2024-10-23	Assessment (B3)	\$7,048.24	Open
2024-10-07	Assessment (B3)	\$529.93	Paid

Most requested

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

Financial ⓘ

Declarations ⓘ

For the purposes of this guide, we are showing the page that will appear after selecting either of the **Upload a document** links.

From this page you may proceed with the following steps:

1. Select the **Category** and **Type** from the drop-down menu.
2. Enter the **Case number** of the document you are uploading for it to be associated with/attached to and then click on **Next**.

The screenshot shows a web form titled "Upload a document - Step 1 of 2". Below the title is a subtitle: "Select the category and type of document (if applicable) for upload, and enter the associated case number, transaction". The form contains three required fields, each with a red asterisk and a help icon: "Category (required)", "Type (required)", and "Case number (required)". The "Category" and "Type" fields are dropdown menus with "Select a category" and "Select a type" respectively. The "Case number" field is a text input. At the bottom left is a "Cancel" button, and at the bottom right is a "Next" button with a right-pointing arrow. A yellow rectangular box highlights the three required input fields.

3. Drag and drop the file from the specified location and click **Upload** to complete the upload process.

The screenshot shows a web page titled "Attachment(s): case #8000000167". Below the title is a subtitle: "Attach any files of producers or manufacturers product literature, drawings, photographs, or schematics." The page has a section titled "Upload files" with the text: "The maximum upload size per file is 15 MB and a maximum of 10 attachments per upload." Below this, it lists "Acceptable file types: .pdf, .doc, .docx, .xls, .xlsx, .rtf, .txt, .jpg, .jpeg, .tiff, .tif, .xps". A large yellow rectangular box contains a file upload icon (an upward arrow) and the text "Click or drag your file here". At the bottom of the page is an "Upload" button.

Important note:

You can only upload PDF, Word, Excel, RTF, JPG, TIFF and XPS documents to the CARM Client Portal.

3. Requesting a new business relationship

3.1 Account types

Within the CARM Client Portal, there are two types of accounts: **Individual accounts** and **Business accounts**.

Individual account:

In order to access a business account, it is mandatory to first have an individual account. This account requires users to complete their personal profile for the user to be granted access to the CARM Client Portal.

Create your personal profile

Your contact details will be used to communicate important updates.

User information

* First Name (required)

* Last Name (required)

Contact Information

* Telephone number(including area code) (required)

Extension

* Email address (required)

* Confirm e-mail address (required)

Settings and Preferences

* 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

To learn more about setting up your Individual account and Personal Profile, see **Section – [Creating your personal profile](#)** of this document.

To learn more about setting up your notifications, see **Section – [Setup of notifications](#)**.

Business account:

Accounts for businesses exist for:

- Organizations that provide services to clients – such as a Service Provider
- Business account that has at least one program account and performs activities as a customs broker or third party.
- Client organizations such as importers, carriers and warehouses.
- Any business account that has delegated their authority to a service provider.

3.2 Business relationships

Business relationships are established between a service provider and its client(s). A client (such as importer) can delegate access to the service provider (such as customs broker) for them to act on their behalf and manage their account(s) within the CBSA by establishing a relationship.

Service providers must first establish a business relationship with their clients to be able to transact with the CBSA on their behalf. Only then will the service provider be able to assign its employees to the clients' accounts to carry out the activities agreed upon in their service.

Important note:

The client determines the relationship type to grant to its service provider(s).

Within the CARM Client Portal, there are two business relationship access types that can be established between a service provider and a client.

These are:

- Business management relationship
- Program management relationship

This table shows the activities and access permissions associated with the Business management relationship and Program management relationship:

Activities	Allowed or Restricted	View as Read-only or View and Edit
View business account profile (general information, ownership, addresses, business activity, settings and contacts)	Allowed	Read-only
View all Program accounts profile (general information, addresses, contacts, owners and sub-programs)	Allowed	Read-only
View the list of programs	Allowed	Read-only
View financial security information	Allowed	View and Edit
View information regarding requests (e.g., Rulings) and transactions (e.g., CAD) on the client's behalf	Allowed	View and Edit
Commonly restricted actions	Allowed	Refer to below

1. **Business management relationship:** This relationship delegates access to all program accounts to the service provider, including any programs added in the future. Commonly restricted actions within a Business management relationship include the following:

- editing the Business account or Program account information
- viewing or editing pre-authorized debit authorizations
- viewing collection-related notifications and payment arrangements
- viewing or editing the client's access requests, and its employees' accesses
- viewing or editing the client's pending business relationship requests, and its list of active business relationship

2. **Program management relationship:** This relationship delegates access to only selected program accounts to the service provider. This table shows the activities and access permissions associated with the Program management relationship:

Activities	Allowed or Restricted	View as Read-only or View and Edit
View program account profile (general information, addresses, contacts, owners and sub-programs)	Allowed	Read-only
View information regarding requests (e.g., Rulings) and transactions (e.g., CAD) on the client's behalf	Allowed	View and Edit
View Business account profile	Restricted	Not available
View list of programs	Restricted	Not available
View financial security	Restricted	Not available
Commonly restricted actions (refer to previous page)	Restricted	Not available

To learn more about managing business relationships, please reference the following guide:

- [User guide – Delegation of Authority](#)

4. Resources

There are several resources that are available surrounding the CARM Client Portal to help support new users:

1. Instructional videos:

- Dedicated instructional videos for portal utilization including step-by-step videos on: Creating and linking individual and business accounts, Delegating authority, Financial information, and more.

2. FAQ:

- The CBSA has provided answers to frequently asked questions that clients may have regarding the portal.

3. User guides:

- These guides will help TCPs understand how to use the CARM Client Portal, with information on the key benefits and capabilities that the portal offers.