



# Onboarding CBSA CARM Client Portal

## Why is this critical for your business?



As the initiative unfolds, remember we're here to help. Reach out to UPS to keep up with and prepare for CARM changes, from setting up a CCP user account or reconciliation of your accounts transactions, to obtaining surety bond.

Visit [UPS Navigating CARM](#) where a team of experts are ready to help you meet your importer obligations under CARM.

CBSA Assessment and Revenue Management (CARM) Release 2 will introduce the next major functionalities to the CARM Client Portal (CCP), transforming how CBSA will assess, collect, manage and report on Canada imports data, duties and taxes.

CARM Release 2, when live, will require all commercial importers to hold their own security bonds and transact with CBSA through the CCP in order to continue to import into Canada.

While proper delegation of authority and security will be required to conduct commercial import activities into Canada only next Spring, the CCP is now live and CBSA wants all commercial importers—resident and non-resident—to register in the portal now.

Initiating the registration process early will help you familiarize yourselves with the portal and the processes associated with CARM implementation.

**Here are the key onboarding steps you should expect to make:**

### Pre-registration

- Identify who will be responsible for all your activities in the CCP: your Business Account Manager (BAM)
- Select the sign-in options you will use to create a user profile in the portal
  - The two authentication processes that allows an individual access to the Government of Canada online portal accounts include a GCKey or the use of a Sign-In-Partner and banking credentials
- Ensure you have a BN9 business number from the Canada Revenue Agency, as well as an importer/exporter program account identifier
- Expect to answer 2 out of 3 of the following affinity questions to complete your registration:
  - What is the transaction number and total duties and taxes of one of your recent transactions?
  - What is the exact value of your most recent payment?
  - What is the balance of your last Statement of Account?

Click [here](#) to view CBSA complete registration instructions.

### Registration

As you register, you should see a request to delegate authority to your broker. Giving appropriate access to your broker ensures they continue to account for your shipments seamlessly when mandatory CARM Release 2 is fully implemented.

### Post-Registration

You will need to setup your profiles and notification preferences. At that point you will have full visibility to your statement of accounts (SOAs) that outlines the customs duties and taxes due to CBSA for all your accounts' transactions, including all potential credits or third-party provider customs payments.

You will also need to inform your employees to request access to the portal in order to be assigned a proper user role in the portal.

The CARM Client Portal is expected to undergo additional critical changes over the next months to enable benefits for businesses, including:

- Importers' ability for electronic commercial accounting declarations, corrections and adjustments
- Changes to Release Prior to Payment requirements for surety bonds
- Harmonized billing cycles
- New offsetting options
- Electronic management for appeals and compliance actions

It's important you prepare now for these changes by knowing CBSA's expectations for importers, learning how to navigate the online portal, and understanding the impact of key actions you need to take (including delegating authority and holding a surety bond) on your imported shipments declarations and releases.