

CARM Client Portal (CCP)

The CARM Client Portal (CCP) is the central feature of the CARM project which, once fully functional, will become the main communications interface between the CBSA and trade chain partners. Through the portal, users will have online self-service access to manage their customs transactions, including electronic submission of corrections and adjustments, applying for classification rulings, and the accounting and payment of any applicable duties, taxes and fees on their imported goods.

Although the CCP will be the new interface for communicating with the CBSA, it will still be possible to transmit data via EDI. Furthermore, the release process in the IID and ACROSS systems will not change with the implementation of CARM.

All trade chain partners that conduct commercial business with the CBSA will be required to register their business on the CARM Client Portal. With CARM Release 1, only customs brokers, importers, and authorized trade consultants will have access to the CCP in order to create their individual user accounts and link their business account(s).

There are several steps for importers to follow in order to register on the CCP and delegate access to their account(s), internally to their employees and externally to their customs broker.

Business Number (BN) / Import-Export Number (RM)

Your CRA assigned 9-digit business number will identify your business account on the CCP, and any RM extensions registered to your BN, will identify your import-export program accounts.

- **CARM Release 1:**

If you do not already have an RM extension set up, contact carm@farrow.com and we will apply for an importer/exporter extension on your behalf;

- **CARM Release 2:**

If you do not already have an importer RM extension set up, access the CCP, create your account, and apply for an importer RM extension directly through the CCP.

CARM Client Portal (CCP) User Roles

Prior to accessing the CARM Client Portal (CCP), please review the below user profile definitions and roles, and determine the list of CCP users and account administrators for your business.

- **Business Account Manager (BAM)** manages the daily customs operations and has full access to all business and program accounts. They are responsible for approving any access requests, from either employees or their customs broker, and for assigning user roles to each new user. Business accounts can only be set up by a Business Account Manager (BAM). *It is **HIGHLY recommended to set up more than one BAM with complete management access to cover any absences, and to share in the administration of your business account(s).***
- **Program Account Manager (PAM)** has the ability to create, edit and view all program account information, and is responsible for approving and granting program access to employees. For example: If ABC Windows & Doors (the 9-digit legal entity) has two import divisions, RM 0001 ABC Windows and RM0002 ABC Doors, the BAM could assign a different PAM to each of the divisions /program accounts, or conversely the BAM could be the sole person responsible for all RM accounts.

The BAM may assign a different PAM for each RM account linked to the 9-digit business account, or conversely, the BAM may serve as the PAM for any and all RM program accounts. What this means is that you do not need to assign a PAM if you choose not to; the BAM could be the sole account manager at both the business and program level.

- **Editor** is able to create, view and edit all transaction information within a program.
- **Reader** is able only to view all transaction information within a program.
- **Expired User** allows the customs broker to be able to view information they submitted on behalf of a client, after the business relationship has expired.
- **Orphan User** has registered on the CCP, but has not been accepted or linked to any accounts.

CARM Client Portal Registration

ALL CCP users must first create their Personal Profile before setting up any business or program profile accounts.

If you are a First-time User – Business Account Manager(s) and all Employees

- Go to the Government of Canada website at <https://www.canada.ca/>;
- Login to the CARM Client Portal via your [GC Key](#) or [Sign-in Partner](#);
- Create your personal profile.

If you are the BAM and would like to register your business, choose “Register My Business.”

- Enter your 9-digit BN and the importer RM extension to link to the business and program account(s);
- Provide your legal entity information - the corporate name and address registered with the CRA;
- Answer the set of infinity/security questions to validate your identity;
- Read and accept the Terms & Conditions covering the delegation of authority between importers and customs brokers;
- Review your business information to ensure accuracy.

If you are an Employee, choose “Request access to my employer.”

- Enter your employer’s 9-digit business number to link to your employer’s account;
- Add a justification note to request access to your employer’s business account. Example: “Hi, I need access to make corrections and adjustments,” or “Hi, I need access to view the monthly payables for our clients,” and then choose **Request Access**.
- Once approved, the BAM will designate a user role for each program account assigned to you.

If you are a BAM or PAM and would like to delegate access to your customs broker or service provider

- From the CCP Home Dashboard, choose “Manage My Business Relationships” to review and approve (or reject) any pending requests listed under “Received requests.” This is where you will see any pending access requests from your customs broker or other service providers.
- If approved, designate access to your customs broker at the business or program account level;
- Set the Business Relationship Details to include an expiry date;
- Set the Visibility Rules to control how much information your customs broker can view or edit. The three visibility options are: Submitted by the Customs Broker; Submitted by you (the importer); and/or Submitted by Other Business (which could include another customs broker).

Only a licensed customs broker with delegated access or the importer can submit the CAD and/or make corrections to the CAD up until the payment due date. *To be clear, even if the customs broker submits the CAD, the importer can still edit and make corrections up until the due date, and adjustments after the due date.*

If you are a BAM or PAM and would like to delegate access to your employees...

- From the CCP Home Dashboard, choose Manage My Employees to review and approve (or reject) any pending employee requests listed under Access requests;
- If approved, select and designate access to any applicable program accounts, and assign the employee their CCP user role ie. BAM, PAM, Editor or Reader, for each program;
- Create Employee groups, based on their user profiles, to facilitate assigning groups of employees to either individual or grouped program accounts.

You are now set up to begin conducting business with the CBSA!

What you, the importer, can do to be ready for CARM:

- If you are a new user planning to use a GCKey to login to the portal, apply online for your GCKey at <https://clegc-gckey.gc.ca/>
- Familiarize yourself with the CCP user definitions and roles – BAM, PAM, Editor and Reader;
- Determine the list of CCP users and account managers for your business;
- If you are the BAM for your 9-digit business account, be sure to have a complete list with all of your active RM program accounts to know the employees responsible for each account. A current list will prepare you for receiving any access requests to know which program account(s) and user roles to assign to each employee. Prior to Release 1, if you are federally incorporated, you can view a list of the RM extensions for your 9-digit business entity here: <https://www.ic.gc.ca/app/scr/cc/CorporationsCanada/fdrlCrpSrch.html>. After Release 1, you can view your list of RM accounts directly on the CCP.
- Make sure your employees have a set of login instructions to register on the CCP;
- Register your business on the CCP as soon as it's available to do so.

For more information, please contact your Farrow Client Partnering Representative.