



Canada Border  
Services Agency

Agence des services  
frontaliers du Canada

# Onboarding to the CARM Client Portal

Canada

CARM

CBSA Assessment and  
Revenue Management

R1

# CARM phased approach to support adoption



Release 1

Basic portal introduction



## Key Functionality for External Clients

- CARM Client Portal is accessible to Importers, Customs Brokers, and Trade Consultants
- Ability to manage account data and delegate authority to customs brokers
- Ability to view statements of account and make electronic payments (pre-authorized debit, credit card, etc.)
- Tool to help classify goods
- Ability to request advance rulings



Release 2

All CARM functionality



## Key Functionality for External Clients

- Ability to register and enroll in CBSA programs
- Portal is accessible to all existing CBSA clients
- Customizable electronic notification options
- Ability to submit new commercial accounting declarations, ability to make corrections and adjustments
- Harmonized billing cycle that aligns payment due dates and provides more time to make interest-free corrections

# CARM Client Portal Onboarding

Onboarding process once CARM Client Portal is available with Release 1

*This step will **only** be required if an importer has not previously transacted business with the CBSA.*



## 2. Create Individual User Portal Account

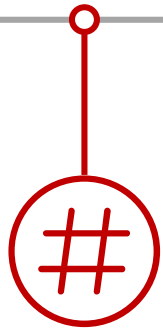
Login to the CARM Client Portal (available only once Release 1 is live) using one of the following login credentials and create your individual user account:

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



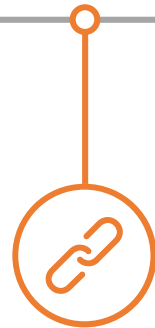
## 4. Grant Access to Employees or Representatives

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.



## 1. Obtain Business Number and RM

Follow the current process to obtain a Business Number (BN) and RM account through the Canada Revenue Agency (CRA)



## 3. Link User Account with Business Account

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

**The Business Account Manager (BAM) in your company must complete this process.**



## 5. Conduct Business with the CBSA

**You are now set up to conduct business with the CBSA on the CARM Client Portal** (e.g. request a ruling, view transaction history, view your statement of account, make payments, use self-service tools)

# Accessing the CARM Client Portal

To access the CARM Client Portal all individuals and businesses must first open the CBSA public web page.

On the Home page, under **Services and information**, you will see the **Log in to the CARM Client Portal** link.

The screenshot shows the top navigation bar of the CBSA website, including the Canadian flag, the text 'Government of Canada / Gouvernement du Canada', and a search bar. Below the navigation bar is a 'MENU' dropdown. The main content area features the heading 'CARM Client Portal' and a sub-heading 'View public information related to the Commercial Client Portal; Login or register for a portal account.' Under the heading 'Services and information', the link '[Log in to the CARM Client Portal](#)' is highlighted with a red box. Below this link is the text 'Use your credentials to register or login to your portal account'. Other links in the 'Services and information' section include 'Bulletins', 'Onboarding documentation', 'List of Licensed customs brokers', and 'CARM Open API Catalog'. The 'Other resources' section contains links to 'Log in to the eManifest Portal' and 'Log in to the Trusted Trader Portal'. A green callout box points to the 'Log in to the CARM Client Portal' link with the text 'Click to access the CARM Client Portal (CCP)'. Another green callout box points to the 'Français' language selector in the top right corner with the text 'Click to change the portal language'.

Click to access the CARM Client Portal (CCP)

Click to change the portal language

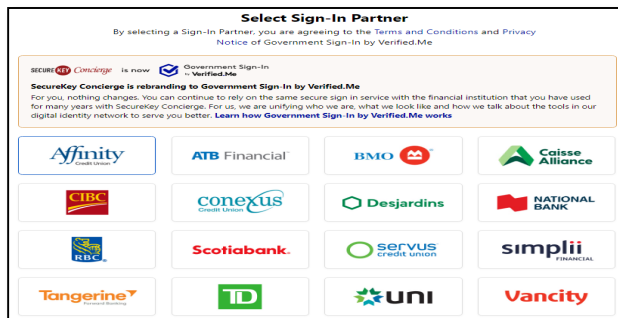
# Initial Setup

All individuals and businesses must first go through the initial setup prior to using the CARM Client Portal's main functionalities.

To log in to the CARM Client Portal, you must select either **Sign-In Partners** or **GCKey**.

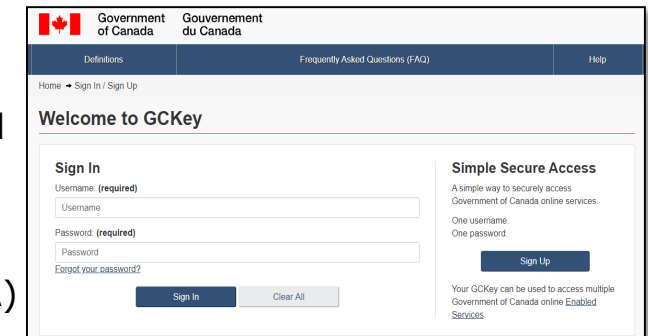
## Sign-In Partners

The **Sign-In Partner** allows you to log in through the web portals of an existing set of financial services.



## GCKey

The **GCKey** allows you to reuse existing credentials used on other Government of Canada portals (such as MyCRA) or create a new one.



# Login Through Sign-In Partners


All individuals and businesses who use the Sign-In Partners option to login into the portal must have an account with the selected partner.

## Sign-In Partners

On selecting a Sign-In Partner you will be directed to the Partner's sign-in page where you need to follow the steps provided for logging in.

















### Select Sign-In Partner

By selecting a Sign-In Partner, you are agreeing to the [Terms and Conditions](#) and [Privacy Notice](#) of Government Sign-In by Verified.Me

SECURE KEY Concierge is now  Government Sign-In by Verified.Me

**SecureKey Concierge is rebranding to Government Sign-In by Verified.Me**

For you, nothing changes. You can continue to rely on the same secure sign in service with the financial institution that you have used for many years with SecureKey Concierge. For us, we are unifying who we are, what we look like and how we talk about the tools in our digital identity network to serve you better. [Learn how Government Sign-In by Verified.Me works](#)

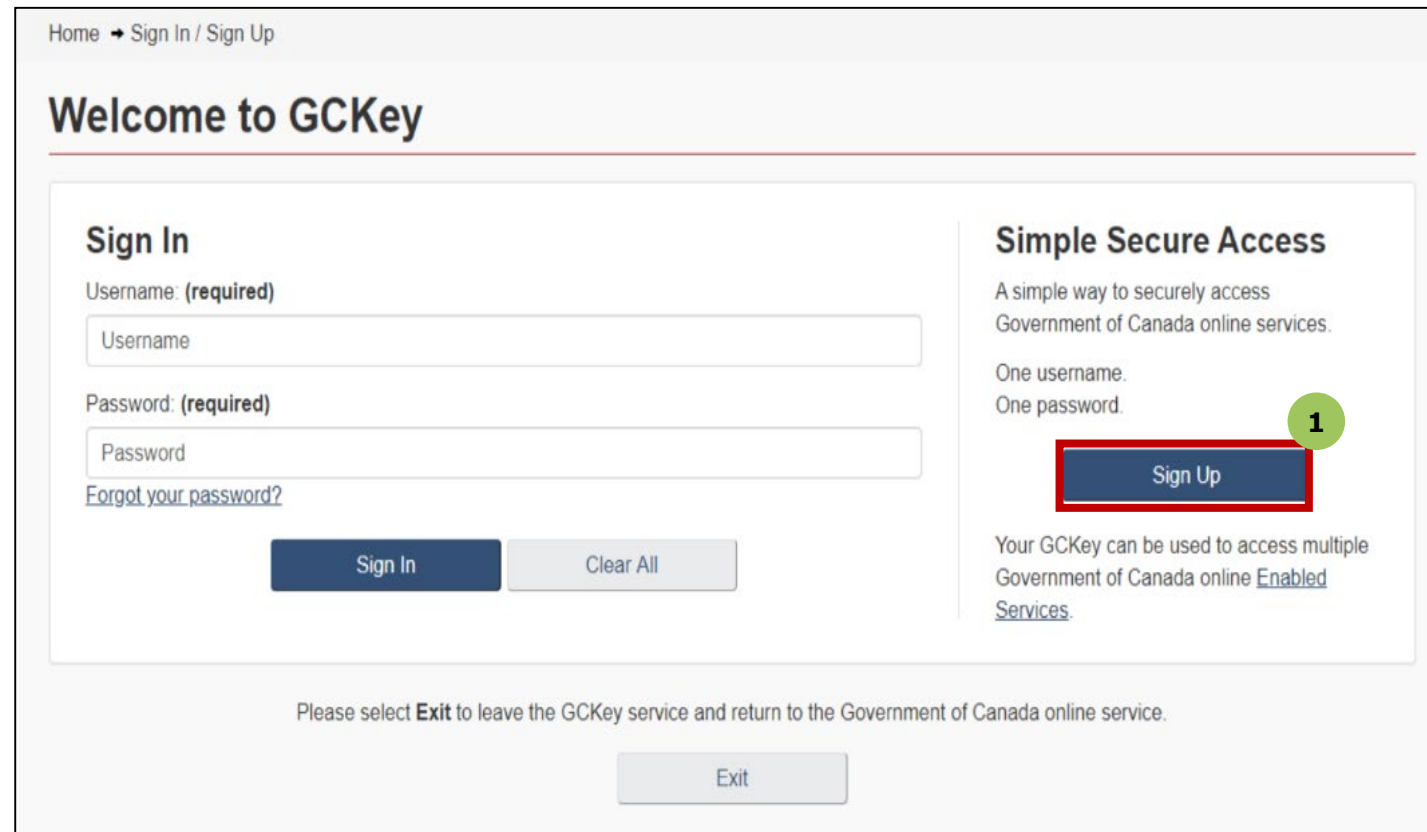
			
			
			
			

# Login Through GCKey

All individuals and businesses who use the GCKey option to login into the portal must create a GCKey if they do not already have an active GCKey. The following is the process for signing up for a GCKey:

If you have a GCKey – select sign-in, if not, follow steps to create a GCKey

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



Home → Sign In / Sign Up

## Welcome to GCKey

### Sign In

Username: **(required)**

Password: **(required)**

[Forgot your password?](#)

### Simple Secure Access

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

One username.  
One password.

**1**

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.

# Login Through GCKey

2. Click the **I accept** button to accept the terms and conditions.

The screenshot shows the 'GCKey Sign Up Step 1 of 4' page. At the top, there are navigation links for 'Definitions', 'Frequently Asked Questions (FAQ)', and 'Help'. Below these is a breadcrumb trail: 'Home → GCKey Sign Up Step 1 of 4'. A progress bar indicates the current step: 'Terms and Conditions' (highlighted in blue), 'Username', 'Password', and 'Questions and Answers'. The main heading is 'Terms and Conditions of Use'. The text states: 'In return for the Government of Canada providing you with a GCKey, you agree to abide by the following Terms and Conditions of Use:'. A bulleted list contains three items: 1. You understand and accept that you are at all times responsible for your GCKey Username, Password and Recovery Questions, Answers and Hints. If you suspect that others have obtained them, you are responsible for revoking your GCKey and obtaining a new one with a new Username and Password. 2. You understand and accept that the Government of Canada can revoke your GCKey for security or administrative reasons. 3. You understand and accept that the Government of Canada disclaims all liability (except in cases of gross negligence or willful misconduct) in relation to the use of, delivery of or reliance upon the GCKey service. More details can be found in our [Disclaimers](#). Below the list, it says: 'By selecting the **I accept** button, you are accepting the GCKey Terms and Conditions as stated above. You can choose to not sign up for a GCKey by selecting **I decline** to end this process.' At the bottom, there are two buttons: 'I accept' (highlighted with a red box) and 'I decline'. A green circle with the number '2' is placed over the 'I accept' button.



# Login Through GCKey

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

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

Definitions Frequently Asked Questions (FAQ) Help

Home → GCKey Sign Up Step 2 of 4

Terms and Conditions Username Password Questions and Answers

## Create Your Username

Your Username must contain between eight and sixteen characters, no special characters (for example: %, #, @) and may contain up to seven digits. 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, address or email address;
- always keep your Username secure and do not share it with anyone.

Privacy

3

Create Your Username: (required)

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

Continue Clear All

Home → GCKey Sign Up Step 3 of 4

Terms and Conditions Username Password Questions and Answers

## Create Your Password

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 name.

Privacy

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

### 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

4

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

# Login Through GCKey

5. Select your preferred **Recovery Questions**.
6. Click the **Continue** button.
7. Click the **Continue** button on the Sign Up Complete page.

### Create Your Recovery Questions, Answers and Hints

Your Recovery Question, Answers and Hints are used to help you if you forget your Password. Please complete all the required fields below to continue the Sign Up process.

**5**

Select a Recovery Question: **(required)**  
Please select a question...

My Recovery Answer: **(required)**

My Memorable Person: **(required)**

My Memorable Person Hint:

My Memorable Date (YYYY-MM-DD): **(required)**

My Memorable Date Hint:

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

**6**

**Privacy**

Please keep your Recovery Question, Answers and Hints secure. For more information on how your privacy is protected, please refer to our [Personal Information Collection Statement](#).

**i**

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 (?).

[Home](#) → GCKey Sign Up Complete

### GCKey Sign Up Complete

You have successfully created your GCKey.  
Your Username is: CDCTest1

Please select **Continue** to leave the GCKey service and return to the Government of Canada online service.

**7**

**Privacy**

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

# CARM Client Portal: Landing Page

On successful log in, the CARM Client Portal landing page displays a standard welcome message and few links through which you can change your password or recovery questions or revoke your GCKey.

The screenshot shows the CARM Client Portal landing page. At the top, there is a header with the Government of Canada logo and the text "Government of Canada" and "Gouvernement du Canada". A language selector "Français" is in the top right. Below the header is a navigation bar with "Definitions", "Frequently Asked Questions (FAQ)", and "Help". The main content area starts with a breadcrumb "Home → Welcome sitgcuser270" and a large "Welcome" heading. Below this, it says "You last signed in with your GCKey on Friday, September 18, 2020 at 11:52:58 ET." and provides links for "Change Your Password", "Change Your Recovery Questions", and "Revoke Your GCKey". A security notice follows: "To help protect your information, please remember to sign out and close your browser before leaving this computer unattended." Below this is a "Continue" button. On the right side, there is an "Options" menu with links for "Change Your Password", "Change Your Recovery Questions", "Revoke Your GCKey", and "Sign Out".

# Profile Creation

When a user log in to the CARM Client Portal for the first time, they will be prompted to create a personal profile.

To setup personal profile, follow the steps below:

1. Click on the **Accounts and profiles** link.
2. Click on **Personal profile**.

Government of Canada / Gouvernement du Canada

CARM Client Portal

543454996RM0002(543454996RM0002)  
ImporterCompany7322 (543454996)

MENU

Upload a document | Notifications | Logout

Last logged in 2020-09-18 14:16 ET

[Setup my portal](#)  
Manage the access of employees and third party businesses.

**1** [Accounts and profiles](#)  
View information about your personal profile, program account(s) or business.

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

**Accounts and profiles**  
View and make updates to your personal and business profiles

**2** [Personal profile](#)  
Maintain individual profile information and portal preferences.

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

[List of program accounts](#)  
A list of all the program accounts associated to your business.

[Program account profile](#)  
Program account profile includes your program RM number, program name and addresses.

# Profile Creation

## CARM Client Portal

MENU ▼ [Personal profile](#) | [Logout](#)

[Home](#) > [Accounts and Profiles](#)

### 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

### 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)

\* Answer 1 (required)

\* Question 2 (required)

\* Answer 2 (required)

\* Question 3 (required)

\* Answer 3 (required)

# First Time Set

After your profile creation, you will be greeted with the First time setup page where two options are available:

## 1. Create an access request

Used for employees requesting access to a business account already registered on the portal.

### 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)

Search

## 2. Register a business

Used by an authorized user with access to privileged information in order to successfully complete the business registration on the portal.

#### Register my business

Are you a **business account manager** who wants to use the commercial client portal for your business?

You will need to have access to privileged information for this process.

Register my business



# Register a Business – Business Account Manager

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- Business Account Manager: this role possesses the highest level of management access over a business account, with complete read, write, and edit privileges.
- Businesses should determine who their Business Account Manager (BAM) is prior to business account set up.
- BAM will need to have the required legal information to link their business account in the portal
- It is highly recommended that businesses assign at least two Business Account Managers.

# Business Account Management - Demonstration



# Profile Creation

After your profile creation, you will be greeted with the First time setup page where two options are available:

## 1. Create an access request

Used for employees requesting access to a business account already registered on the portal.

### 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)

Search

## 2. Register a business

Used by an authorized user with access to privileged information in order to successfully complete the business registration on the portal.

#### Register my business

Are you a **business account manager** who wants to use the commercial client portal for your business?

You will need to have access to privileged information for this process.

Register my business

# Employee Request – Demonstration

# Important Points for Initial Setup

As of Release 1, Customs Brokers, Importers and Trade Consultants will be able to request access to the new CARM Client Portal to view and verify their client and financial information.

## Login Credentials

- Each user should have their own set of credentials and personal profile.
- Only 1 set of credentials can be used on a user's account (GCKey or Sign-In Partner).
- The CBSA can't retrieve lost credentials (username or password), the user must follow the credential provider's process.

## Register a business

- The user who completes the registration of the business on the CCP automatically becomes a Business Account Manager (BAM).



- A business account can only be registered once, but it's BAM can assign other users as a BAM (or other user roles) through the Employee management page

# Thank You!

## For more information:

- Visit the [CARM CBSA website](#)
- Questions? 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)
- Join the [CARM LinkedIn Group](#)
- Join the CARM [GCcollab](#) Forum
- Join our distribution list, reach out to the [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)