

# How to Register for the CARM Client Portal

## WHAT IS CARM?

The Canada Border Services Agency (CBSA) requires all commercial importers to establish a CBSA Assessment and Revenue Management (CARM) account. CARM allows importers to post financial security and pay duties and taxes on imports.

## TABLE OF CONTENTS

CARM Client Portal Pre-Registration Checklist	2
Step 1: Choose Your Sign-in Option	3
Step 2: Register Your Business	3
Step 3: Delegate Access to Customs Broker	5
Step 4: Delegate access to your team	7
Step 5: Release Prior to Payment (RPP):	8
Step 6: Financial Security	10
Step 7: Verify successful enrollment in RPP	11
Troubleshooting	13

# CARM Client Portal

## Pre-registration Checklist

HOW TO REGISTER | CARM



Before registering in the CARM Client Portal, either independently or with our Portal Set-up Assistance, ensure you have key details ready to facilitate a smooth registration. Missing this information can prolong the process.

**Legal Company name and address as recorded with the Canada Revenue Agency (CRA).** If you're unsure of your registered names and locations with the CRA, here are a few ways to find out.

- Log in to your CRA Portal to see what address is being used there.
- Call the CRA Business Enquiry Line at 800-959-5525.
- Review the address on any mail correspondence that the CRA has sent you.
- Check if the original company set up with the CRA used the owner's home address.
- Check and see if the company's lawyers' or accountants' addresses have been used.
- If your company has moved and has not updated the address with the CRA, you may have to try the old addresses.

**Business Number(s)**  
A Business Number (BN) is a nine-digit number the CRA uses to identify your company for its various "Program Accounts."

- If your company operates in Canada, you already have a Business Number. Your GST/HST number's first nine digits are your 'Business Number.'
- If you do not have a Business or GST/HST number and your company resides in Canada, you can obtain one through the [CARM Client Portal registration process](#).
- If your company lacks a Business Number and is NOT in Canada, you are a Non-Resident Importer. Obtain a Business Number from the CRA by completing the [Non-Resident Business Number and Account Registration Web Form](#). Follow up on your registration by calling the [Non-Resident Registration and Security line](#).

*If your company needs to make changes to an existing Business Number, you can do so by contacting one of the following:*

- **Resident Importers:** CRA's Business Enquiries line at 1-800-959-5525.
- **Non-Resident Importers:** Non-Resident Registration and Security line at 1-866-453-0452 or call collect at 1-613-221-3039 if you are outside of Canada/U.S.
- Note: If your company only has a nine-digit BN with the CRA and no other CRA program accounts (such as GST/HST [RT] or Payroll [RP]), only the owner of the business can make changes to the BN account.

**Import/Export Number(s)**  
An Import/Export Program Account Number (RM) is a requirement of the Canada Border Services Agency (CBSA).

- If you do not have an RM number and have already obtained your BN, you can obtain one through the CARM Client Portal registration process.
- If you need to make changes to your RM, you can do so within the CARM Client Portal.

**Identify Your Business Account Manager (BAM)**  
The first person to link a personal profile to a business account becomes the BAM, who has the highest access level in the CARM Client Portal, authorized to read, write, and edit all business information. We recommend designating at least two people in your organization as BAMs:

1. **A person responsible for your payments to CBSA**
2. **A person responsible for your customs processes**

*Once you have all of the above, you are ready to begin the CARM Client Portal Registration process that follows.*

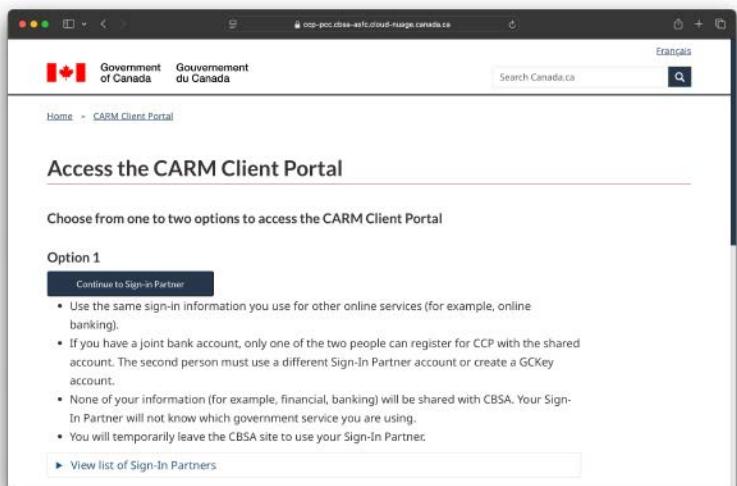
# CARM Client Portal Registration Steps

Visit the [CBSA Assessment and Revenue Management project](#).

## STEP 1

### Choose Your Option

- **Option 1:** Sign-in Partner: Use the same sign-in information you use for other online services (for example, online banking).
- **Option 2:** GCKey: Anyone can create a GCKey, whether in Canada or not. You may already have a GCKey if you are part of the Trusted Trader, CERS, or Emanifest Portal and can use this to register on the CARM Client portal. You cannot use the same GCKey that you have with CRA. If you need a GCKey, click Sign Up on the right-hand side and follow the instructions.



Access the CARM Client Portal

Choose from one to two options to access the CARM Client Portal

Option 1

Continue to Sign-in Partner

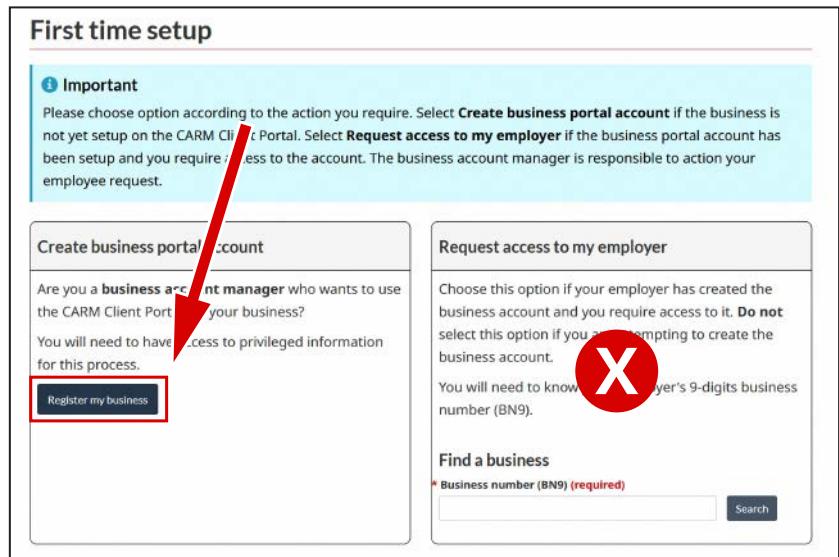
- Use the same sign-in information you use for other online services (for example, online banking).
- If you have a joint bank account, only one of the two people can register for CCP with the shared account. The second person must use a different Sign-In Partner account or create a GCKey account.
- 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](#)

## STEP 2

### Register Your Business

Once you have your Sign-in Partner or GCKey, you can continue to the CARM Client Portal and click on “Register My Business”, which is found on the side of the page. You will need your 9-digit Business Number (BN) and 4-digit Importer Program Number (RM).



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)



It is very important that the business name and address that you register are the same as on file with the CRA. Formatting matters for this (unit numbers, etc). For more troubleshooting tips, visit our blog [How to Manage Common CARM Portal Difficulties](#).

Generally, you will be asked to select two of the three questions below to answer. In cases where information does not exist on the account, you will only be presented with options where information exists, and may only be required to answer one question:

**Question 1:** The total amount of duties and taxes of an import accounting transaction accepted by the CBSA from the past six years to the present.

**Question 2:** The exact value of a payment: You will be asked to select a date and enter the value of a payment to CBSA. Zero-dollar (\$0.00) amounts are not accepted. You can decide which payment to provide.

**Question 3:** Statement of Account Balance: You will be asked to select a date and enter the statement of account balance for the chosen date. Zero-dollar (\$0.00) amounts are not accepted. You can decide which Statement of Account balance to provide.



*If you have imported into Canada before, the Customs broker you used for these imports will have this information. If you have imported with PCB, we would have shared the answer to these security questions in our email titled "**Importing into Canada - Rate & Instructions.**"*



You have ten attempts before being locked out. If you get to nine, log out and go back in again. This will reset your ten attempts. Should these answers not work, you may need to reach out to the CARM Help Desk (contact details can be found in the Troubleshooting area at the end of this document).

Next, you have to add the contact information of an authorized officer who has financial control over the business. This person's name and title will be affixed to the electronic surety bond.

## Authorized officials

CBSA requires the details of company officials as a matter of financial control. You must provide the details of at least one authorized company official.

### ④ Requirements

Authorized company official(s) are required for financial control when obtaining and posting surety bonds for the purpose of transacting in bonded operations (e.g. bonded transporter or Release Prior to Payment). The designated official's title and name will be affixed to all surety bond submissions.

The Portal will then ask for generic contact information. If you are a Non-Resident, you will be prompted to input the address where your books and records are kept. If this is outside of Canada but still in North America, you will be required to submit form BSF900. Books and records cannot be kept outside of North America.



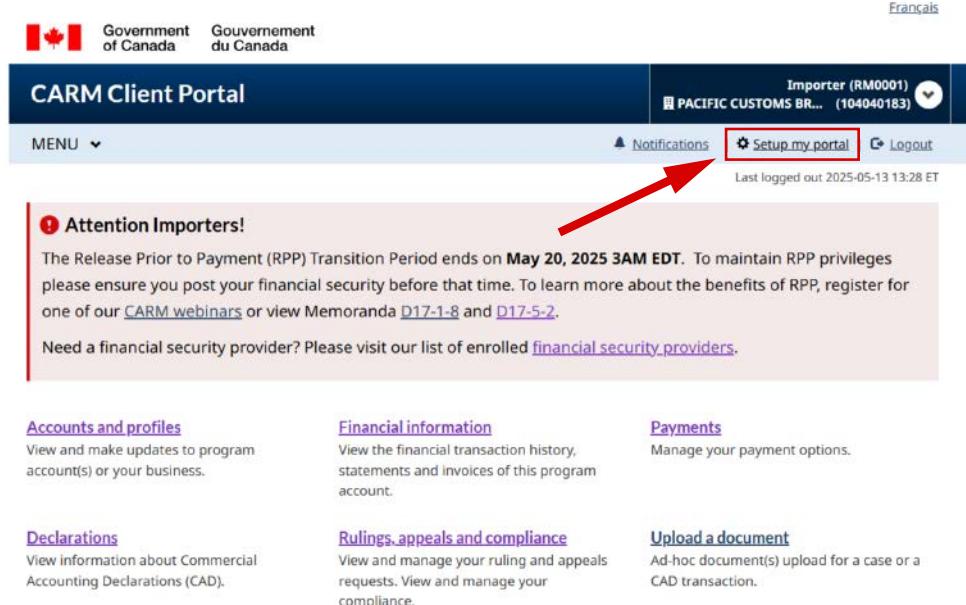
## STEP 3

### Delegate Access to Customs Broker

Once registered on the portal, you will want to assign access to your Customs Broker.

#### To do so:

- click **Set Up My Portal** (in the upper right corner)
- click **Manage my Business Relationships**
- click **Receive requests**



The screenshot shows the CARM Client Portal interface. At the top, there is a Canadian flag and the text "Government of Canada" and "Gouvernement du Canada". On the right, it shows "Importer (RM0001)" and "PACIFIC CUSTOMS BR... (104040183)". Below this is a "Notifications" button, which is highlighted with a red arrow. The "Setup my portal" button is also highlighted with a red box. The status bar at the bottom right shows "Last logged out 2025-05-13 13:28 ET".

**Attention Importers!**  
The Release Prior to Payment (RPP) Transition Period ends on **May 20, 2025 3AM EDT**. To maintain RPP privileges please ensure you post your financial security before that time. To learn more about the benefits of RPP, register for one of our [CARM webinars](#) or view Memoranda [D17-1-8](#) and [D17-5-2](#).

Need a financial security provider? Please visit our list of enrolled [financial security providers](#).

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

**Declarations**  
View information about Commercial Accounting Declarations (CAD).

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

**Rulings, appeals and compliance**  
View and manage your ruling and appeals requests. View and manage your compliance.

**Payments**  
Manage your payment options.

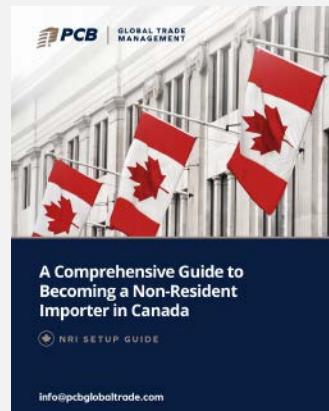
**Upload a document**  
Ad-hoc document(s) upload for a case or a CAD transaction.



### NON-RESIDENT IMPORTER GUIDE

For more information about keeping records as a Non-Resident Importer, please download our comprehensive guide, which includes record-keeping requirements as well as tax implications of importing into Canada.

 [Download the Guide](#)



**A Comprehensive Guide to Becoming a Non-Resident Importer in Canada**

NR1 SETUP GUIDE

info@pcbglobaltrade.com

You will see your broker's request there waiting for approval.

CARM Client Portal

Manage business relationships

Pending third party access requests

Status	Business name	Request date	Actions
Pending		2020-12-04	<input type="checkbox"/> Approve <input checked="" type="checkbox"/> Decline <input type="checkbox"/> Report

We recommend the following when delegating access to Pacific Customs Brokers and ABC:

**1. 'Select Access to Programs: All Programs'**  
(this is your RM Importer Program Account/ Accounts)

Request details

Indicate which programs the third party should have access to by selecting either All programs, or Specific programs

I would like to receive access to be able to create declarations.

Select access to programs

All Programs  Specific programs

Program name: \_\_\_\_\_ Account number (RM): \_\_\_\_\_  
RM0001

**2. Access - 'Business Management.' Select Proxy Business Manager from the drop-down menu.**

This visibility level will give us access to all functionality except for seeing and accessing your sensitive business information, such as financials, employees, and business relationships. This access level is required by the Customs Broker who will be applying for your binding rulings and other aspects of managing your obligations with Customs.

Approve business relationship: 1. Select access

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

1. Select access  2. Confirm

Request details

Third party business name: \_\_\_\_\_

Requestor's name: \_\_\_\_\_ Requestor's email: \_\_\_\_\_

Telephone: \_\_\_\_\_ Request date: 2020-12-04

Request comments: I would like to receive access to be able to create declarations.

Select access to programs

All Programs  Specific programs

Access:

Program name: \_\_\_\_\_ Account number (RM): \_\_\_\_\_  
RM0001

Select the type of access that this third party should be granted

### 3. Transaction Visibility

#### Rules: All Three

This access level is required by a Customs Broker who will be applying for your binding ruling, as well as other aspects of managing your obligations with Customs.

▶ Please see this [instructional video](#) if you require more direction.

Requestor's name: [REDACTED] Requestor's email: [REDACTED]

Telephone: [REDACTED] Request date: 2020-12-04

Request comments: I would like to receive access to be able to create declarations.

Select access to programs:

All Programs  Specific programs

Access: Business management

Program name: [REDACTED] Account number (RM): RM0001

Transaction visibility rules:

Submitted by [REDACTED]  
 Submitted by [REDACTED]  
 Submitted by other businesses [REDACTED]

Cancel

Indicate the transaction visibility attributes for the third party here. Transaction visibility rules control what the third-party service provider and its employees can see when working on this account. By default, visibility is set to only those transactions submitted by the third party's employees.

Version 0.1.55

Next →

## STEP 4

### Delegate access to your team

You may also want your employees to have access to your portal. CBSA strongly recommends that at least two people in your organization have BAM (Business Account Manager) authority. The person responsible for your payments to CBSA, and also the person responsible for your customs process.

Employees will need to go to the CARM Client portal and create their own GCKey or Sign-in Partner. Once they do this, they can continue to the CARM Client Portal and then click on '**Request Access to My Employer**'. They will need your 9-digit business number to do this. As a Business Account Manager on the portal, you can access these requests in '**Set up my Portal**' and then '**Manage My Employees**'.



*Once registered, you will see all of your transactions from all brokers back to May of 2021, and you will receive your CBSA statement of account in the portal each month. Please ensure to access your portal each month to keep it active.*

*Your statement of account will be available in the CARM Portal on the 25th of the month. You are responsible for remitting all duties and taxes owed directly to the CBSA.*



## STEP 5

### Release Prior to Payment (RPP)

The RPP Program allows importers to obtain the release of goods from the CBSA prior to the submission of the final accounting documents (CAD) and payment of duties and taxes owed. Without RPP, you would be required to pay upon importation. This area of CARM will also indicate the amount of financial security that needs to be posted in the portal.

1. Click on “Accounts and Profiles”
2. Click on “Program Account Profile”
3. Click on the “Sub-Programs” tab
4. Click on the blue “Enroll in Sub-Program” button
5. Select “Release Prior to Payment (RPP)” and click “Enroll in Sub-Program”



*In Step 5, if you cannot select “Release Prior to Payment” or it is not displayed, you have likely:*

- *Selected an incorrect RM number in Step 1 above.; OR*
- *You have already successfully enrolled, OR*
- *You have a pending enrollment (see ‘Step 7: Verify Successful Enrollment in RPP’)*

6. Scroll down until you see the “System Calculated Security Requirement”. CBSA has calculated the amount shown based on your highest monthly duties and taxes owed in the last 12 months. Please write this amount down, you will need it later.
7. Select “NO” to the prompt “Are you requesting a modification to the security requirement calculated by the CBSA?”

*Continued on pg. 9*



Security requirement  
self-assessment  
**Do not click “Yes”**

If you select “Yes” to the question “Are you requesting a modification to the security requirement calculated by the CBSA?” you cannot import until CBSA has reviewed your case (currently a 25 business day wait time). To cancel this request, you must call CBSA and ask them to cancel your RPP case number

Security requirement guidelines

Release Prior to Payment security requirements

Security requirement is calculated in real-time based on the highest amount of accounts receivable from the previous 12 months. Should you not have transaction history, you need to post security in the amount of the highest monthly account receivables expected. Regardless of the amount posted, you need to monitor and maintain security based on your importation activities.

Calculated security requirement

Program account name: Not available

Program account number: 755437540RM4830

System calculated security requirement: CANS 30,000.00

Security requirement self-assessment

Are you requesting a modification to the security requirement calculated by the CBSA? (required)

Yes

No

← Previous

Start



8. Select "Start"
9. Click "Add bond" under the bond list. Stop here, and read through your bond options below.



Understand the pros and cons of each bond type

## Continuous Surety Bond vs Cash Bond

Continuous Surety Bond	\$	Cash Bond	\$ - \$\$\$\$
<ul style="list-style-type: none"> <li>• Only 50% of the highest monthly duty and tax payout must be covered by a surety bond.</li> <li>• \$650 purchase price on the surety bond covers up to \$50,000 in monthly duty and tax payouts.</li> <li>• Allows for greater fluctuations in duty and tax costs throughout the year.</li> <li>• The bond setup is completed by PCB in under an hour and loaded into your CARM Client Portal on your behalf.</li> <li>• PCB will manage the renewal process each year on your behalf.</li> </ul>		<ul style="list-style-type: none"> <li>• 100% of the highest monthly duty and tax payout must be covered by a cash deposit.</li> <li>• Cash deposits can be made in the form of Credit Card payments, effectively tying up your purchasing power.</li> <li>• As duty and tax payouts fluctuate throughout the year, the cash amount posted may no longer cover the amount due, prompting CBSA to notify the importer through the CARM Client portal (an email will not be sent to the importer directly) to add more cash. Should the nudge be missed, future shipments will be denied entry at the port of crossing.</li> <li>• Once posted, getting a reimbursement of a cash bond can take time, as three government agencies are involved.</li> <li>• The importer is responsible for the loading of the cash bond as well as making the payments (there is a detailed process in which all steps must be followed to ensure correct set up.)</li> </ul>	



## STEP 6

### Financial Security

Posting a form of financial security is a requirement for importing commercially into Canada and to continue to enjoy Release Prior To Payment (RPP) privileges at the port of crossing, meaning that their goods will be released into Canada prior to paying the duties and taxes (which will instead be paid after importation).

We recommend that importers purchase a continuous surety bond if they import more than once per year.

#### Post a continual surety bond - \*\$650

- Quick and easy set up in under an hour.
- Best for frequent importers.
- \*\$650 bond provides you coverage for monthly duty and tax payouts up to \$50,000. (For a minimum of \$5000 and up to \$25000 in coverage. Importers must purchase a bond equal to or greater than 50% of the highest monthly accounts payable to the CBSA within the most recent 12-month period. Importers without a 12-month history will need to estimate the amount of duties and taxes. Renews annually.)



#### PURCHASE A SURETY BOND

To purchase a Surety bond, please fill out our **Bond Authorization form** and email it to [carm@pcb.ca](mailto:carm@pcb.ca).

 <b>GLOBAL TRADE MANAGEMENT</b>		WEBSITE <a href="http://pctglobaltrade.com">pctglobaltrade.com</a>	TELEPHONE Ph: 604.538.1565 Fax: 604.576.2192	ADDRESS 101-10327 1st Avenue Surrey, BC V3Z 9S1
<b>Importer Bond Authorization</b>				
<small>Pacific Customs Brokers Ltd. is a privately held company and recommends a bond on your behalf, allowing for the release of goods prior to payment of duties. Designated Client Name: Pacific Customs Brokers Ltd. and authorized to act on behalf of the Importer (Importer) as defined below, under the Importer's account security number, but against your own bond. As Importer, you are liable for all duties, taxes and charges on imported goods. You are required to verify the accuracy of all information contained on Customs documents or you may be penalized by Canada Border Services Agency.</small>				
<b>Applicant</b>				
Applicant's Full Legal Company Name		Doing Business As		
Years in Business		Type of Business / Industry	Canadian Business GST / HST #	
<b>Mandatory Q &amp; A for Surety</b>				
<small>1. Has any insurance company / surety refused to issue or continue a bond with the applicant? <input type="radio"/> Yes <input type="radio"/> No 2. Has the applicant or his owners ever failed in business or compromised with creditors? <input type="radio"/> Yes <input type="radio"/> No 3. Are any lawsuits, judgments or liens pending against the applicant or any of his dependents? <input type="radio"/> Yes <input type="radio"/> No 4. Has the applicant and / or shareholders or owners produced losses to a surety company or have some unpaid amounts with a surety? <input type="radio"/> Yes <input type="radio"/> No 5. Has owners / officers or directors of the applicant been principals in another organization with uninsured AP's or personal?</small>				
<b>Third Party Security Required</b>				
<small>This can be found in your CBSA Client Portal. Please note that you must choose either Financial Security or Surety Bond. You can not have a surety bond and financial security at the same time.</small>				
<b>Optional Service: \$10 monthly fee for a statement of account duty &amp; tax reconciliation of duty and taxes owed.</b>				
<small>To ensure your good financial standing with CBSA Accounts Receivable Ledger (AR), a monthly statement can be provided to you on the 20th of each month indicating the amount of GST owed on your imports with Pacific Customs Brokers. This service is at no cost and will highlight any errors incurred in the reconciliation process. This information is also available in your own CBSA Client Portal.</small>				
<input type="radio"/> Yes		I understand the monthly statement of account		
<input type="radio"/> No		I understand it is my responsibility to maintain our financial standing with the CBSA Statement of Accounts Receivable Ledger. We will refer to our CBSA Client Portal for the CBSA Statement of Account moving forward to ensure prompt payment of duty and tax owed.		



If you are only importing once per calendar year, posting a cash bond may be a good option for you, depending on the duty and tax payout on your goods. Should your duty and tax payout be more than \$650 (the purchase price of a continual surety bond), a constant surety bond offers greater value:

- **Post a cash bond** that is equal to or greater than 100% of your highest monthly accounts payable to the CBSA within the most recent 12-month period. The cash bond can be posted to the account by making a deposit through the CARM Client Portal (CCP). This form of security is recommended for infrequent, low-duty, and tax-value importers only. To post a cash bond in your CCP, use this [CBSA guide, starting on Page 10 and following through to Page 16.](#)

## STEP 7

### Verify successful enrollment in RPP

1. Return to the CARM homescreen
2. Click on "Accounts and Profiles"
3. Click on the "Sub-Program" tab
  - a. If you have successfully enrolled in RPP, it will appear in the "Active" section
  - b. If you have not successfully enrolled in RPP, it will appear in the "Requests" section. To activate, follow these steps:
    - i. Look for "Deposit \$" and click on "\$"
    - ii. Scroll down, click "Next"
    - iii. Scroll down and click on "Submit Security." The screen should reload and say "Confirmation of successful enrolment". To ensure the CBSA has received this request, on the same screen, click "List of Requests," and "Release Prior to Payment" should appear under the "Active" tab.



*If you cannot click on "Submit Security" in step 3b, i the amount of Financial Security posted is insufficient for participation in the RPP subprogram. CBSA will require additional security to be posted. Once completed, please complete the rest of the steps.*





## CARM MONTHLY REPORT

Should you require a more detailed report than what is available in the CARM Client Portal (CPP), PCB provides a robust monthly report, making it easier for you to understand the amount owed to CBSA for each transaction.

## Monthly Transaction Report - \$150

*Detailed listing of all transactions imported under your business number. Email [carm@pcb.ca](mailto:carm@pcb.ca) to enroll.*



**PCB Global Trade Management**  
Monthly Transaction Report  
Your Import Company Ltd. - 12345678RM0001  
From: 18-April-2025 To: 17-May-2025

Date	Transaction	PCB Invoice	Vendor / Port	PO	Duty	Excise	SIMA	GST	Total
21-- Apr-2025	12356789123	<a href="#">176375</a>	ATLANTIS AUTOMOTIVE 813, PACIFIC HWY/SURREY	66779	\$783.99	\$0.00	\$0.00	\$41.26	\$825.25
23-- Apr-2025	12358789989	<a href="#">176972</a>	COASTAL COLLECTABLES 841, ALDEGROVE BC	66888	\$2,217.11	\$0.00	\$0.00	\$116.69	\$2,333.80



## CARM PAYMENTS

### Need Help Making Your Duty & Tax Payments in CARM? We Can help!

For some importers, the additional knowledge and effort required to do so pose a significant challenge and a considerable risk. For this reason, we have decided to introduce one of our newest services CARM Payments. These services grant PCB full access to your CARM account and allow us to handle the additional complexities and challenges posed by CARM on your behalf while you continue operating in the same way you always have.

### CARM Payments - \$450 per month (min) or \*1%

- Monthly payment of duties and taxes owed within your CARM client Portal
- Easy to understand Monthly Transaction Report (\$150 value)

**Enroll in the CARM Payments Service by emailing [carm@pcb.ca](mailto:carm@pcb.ca).**

*\*1% of total monthly duty and tax owed, based on the statement of Account balance as shown in the CARM Client Portal. CBSA processing times may impact the amount owed, and this is out of our control.*



HOW TO REGISTER | CARM



# Troubleshooting:

Should you run into any trouble setting up your CARM Client Portal, you are invited to utilize the following tools:

- [CBSA User Guides](#)
- [How to Manage Common CARM Portal Difficulties.](#)

## **CBSA CARM Client Support Helpdesk - Free**

### **Hours of Operation**

Monday to Friday, 7am to 5pm ET.

**Telephone - 1-800-461-9999.**

### **Portal Set-up Assistance - \$425**

This is a one-on-one virtual walk-through of the setup process. At the conclusion of this process, importers will have completed the CARM registration process.

### **CARM Consulting - \$195 - \$425 / hour**

Speak to one of our CARM Specialists and receive independent focus on the issue at hand. This can cover payment options and troubleshooting tips. A CARM account specialist can assist with reconciliation, provide an overview of your Commercial Accounting Declaration, financial security, adding additional delegations/employees to an account, and much more.