



Canada Border
Services Agency

Agence des services
frontaliers du Canada

What You Need to Know with CARM Release 2 Webinar

Canada

CARM | CBSA Assessment and
Revenue Management

Today's Webinar

Purpose

An overview of upcoming changes at Release 2 of the CARM Client Portal to help Importers prepare.

Agenda

1. What is CARM, What is the CARM Client Portal (CCP)?
2. Key Changes
3. Next Steps / Additional Resources
4. Q&A

Coming soon

Step by step instructions of R2 portal functionalities will be covered in the next series of webinars.

The CARM Vision

*Deliver a **globally-leading** customs experience that is client-centric, facilitates legitimate trade, improves compliance and revenue collection, and contributes to securing the borders of Canada.*



CARM Phased Approach to Support Adoption

Release 1: **NOW LIVE**

Basic portal introduction



Access

Available to Importers, Customs Brokers and trade consultants



Account Data

Ability to manage account data and delegate authority to Customs Brokers



Payments

Ability to view statements of account and make electronic payments (pre-authorized debit, credit card, etc.)



Self Service

Tool to help classify goods



Rulings

Ability to request advance rulings

Release 2: To Be Announced

All CARM functionality



Access

Available to all CBSA clients



Enrollment

Ability register and enroll in CBSA programs



CAD NEW!

Ability to submit new commercial accounting declarations, ability to make corrections and adjustments



Notifications

Customizable electronic notification options



Billing Cycle

Harmonized billing cycle that aligns payment due dates and provides more time to make interest-free corrections



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Key Change: Commercial Accounting Declaration (CAD)

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The B3/B2 Will be Replaced by the Electronic CAD

- Today, the B3 and B2 forms are how the goods are accounted for.
 - This might be done directly by the Importer or the Customs Broker if they work with one.
- In the future, a Commercial Account Declaration (CAD) form will account for the goods imported.

The image shows a paper form titled 'CANADA CUSTOMS CODING FORM' and 'DOUANES CANADA - FORMULE DE CODAGE'. It includes fields for 'IMPORTER NAME', 'COMMODITY', 'TOTAL NET WEIGHT', and 'TOTAL NET VALUE'. The form is divided into several sections for data entry.

Create declaration

Overview

Status: Draft
Type: V
Transaction #: 32121231311111

- ✔ Step 1: General Details
- ✔ Step 2: Invoices & Commodities
- Step 3: Review & Submit

Estimated Duties and Taxes
103.43 CAD

Step 2: Invoices & Commodities

After adding invoice, click commodity action button to add product information

Add invoice

Line #	Invoice #	Vendor name	Actions
1	2131	Vendor 1	+ Commodity, ✎ Invoice, ✎ Vendor, ✕ Delete
Comm. line number	Classification number	Narrative description	Actions
1	2309.10.00.10	Biscuits	✎ Edit, ✕ Delete
2	0808.10.10.13	Pears	✎ Edit, ✕ Delete

The CAD can be Submitted to the CBSA in Multiple Ways

CARM Client Portal

Importer can access the CARM Client Portal to submit the CAD by visiting the CBSA website.

Webservice

Webservice allows Importer to submit the CAD via an Application Programming Interface (API).

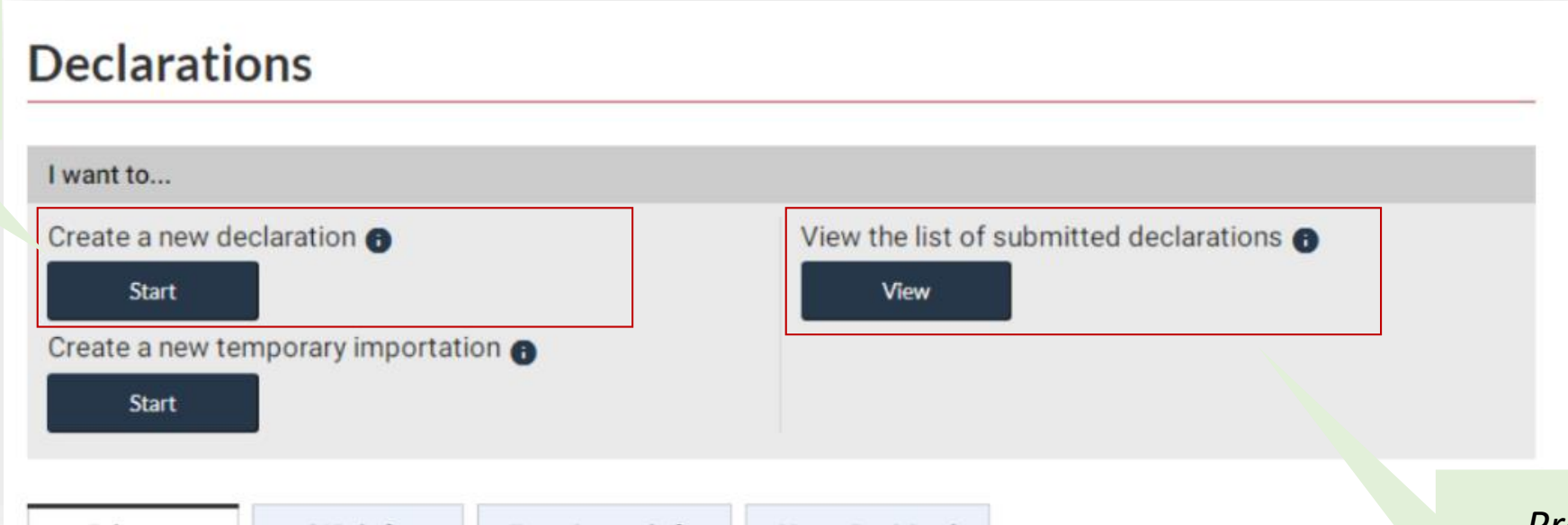
Electronic Data Interchange

Many Brokers use this method to transmit information on behalf of their clients (Importers).

CAD Will Simplify the Process of Submitting Accounting

CAD will increase flexibility and convenience for cash entries

CAD can be submitted on the Portal.



Previously submitted CADs can also be viewed.

Portal Allows the Importer to Leverage CAD Templates and Existing Information

Create declaration

Overview

Status: Draft
Type: V
Transaction #: 32121231311111

✓ Step 1: General Details
✓ Step 2: Invoices & Commodities
○ Step 3: Review & Submit

Estimated Duties and Taxes
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Step 2: Invoices & Commodities

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1	2309.10.00.10	Biscuits	✎ Edit ✕ Delete
2	0808.10.10.13	Pears	✎ Edit ✕ Delete
3	0808.10.10.16	Red Delicious ...	✎ Edit ✕ Delete

Items per page: 10 1 to 2 of 2 Page 1 of 1

← Previous Save draft Next →

Certain fields are prepopulated to expedite submission of CAD.

CAD can be saved and resumed at a later time.

CAD Will Result in Efficiencies and Convenience to TCPs

B3/B2

CAD



Limited ability to make corrections



Corrections supported by CCP and EDI



Duties and Taxes calculated by the TCP and validated by CBSA



Duties and Taxes calculated by CBSA, results transmitted to the TCP



Adjustment process using paper



Electronic Adjustment process



B2 process duration is 3 – 6 months



CAD adjustment process duration could be minutes



To communicate with a CBSA officer, would need to send in documents



Have the ability to upload PDF and communicate directly through portal



Need to call in to learn about status



Can check status directly through portal

At Release 2, Changes to a CAD can be Made Before and After the Payment Due Date

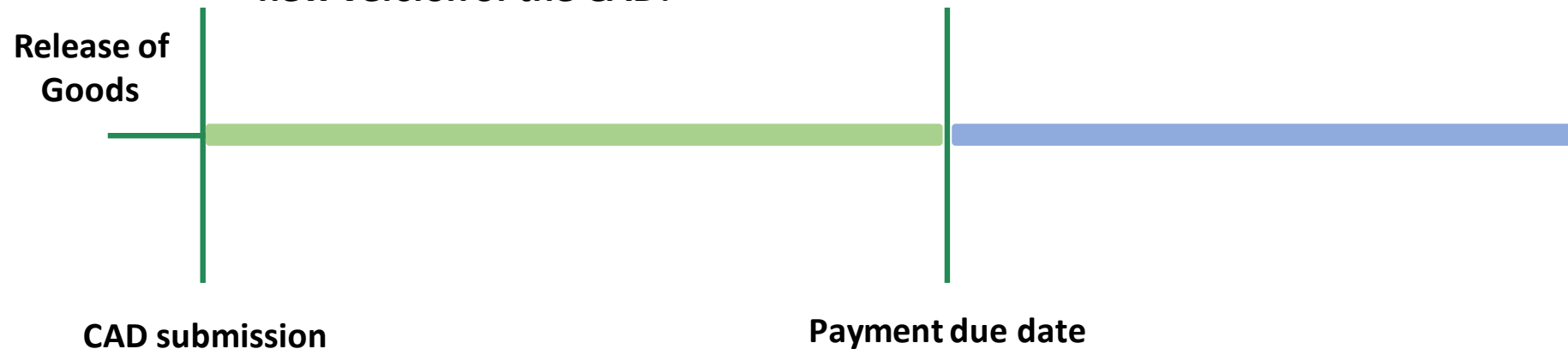
NEW

Correction Period

Importers can make interest-free electronic changes (corrections) to their CADs – which will **create a new version of the CAD.**

Adjustment Period

Importers can make electronic changes (adjustments) to their CAD, which may incur interest.



CARM Client Portal Keeps Track of All Versions of a CAD

Declarations | Mass Adjustments | Temporary Imports | Duty Drawbacks | ROI

View drafts **4**

Advanced search

Date range 2022-03-01 – 2022-06-01

Payment due date	Status	Form type	Version	Filer	Actions
2022-05-31	Approved	AB	00001	ACL IMPORTER 2...	View Withdraw Edit Upload
2022-07-01	Approved	20	00001	ACL IMPORTER 2...	View Withdraw Edit Upload
2022-05-31	In Process	AB	00001	ACL IMPORTER 2...	View Withdraw Edit Upload
2022-07-01	Approved	10	00001	ACL IMPORTER 2...	View Withdraw Edit Upload
2022-05-31	Approved	AB	00004	ACL IMPORTER 2...	View Withdraw Edit Upload
2022-03-31	Approved	AB	00003	ACL IMPORTER 2...	View Withdraw Edit Upload
2022-04-29	Approved	F	00001	ACL IMPORTER 2...	View Withdraw Edit Upload
2022-05-31	Rejected	V	00002	ACL IMPORTER 2...	View Withdraw Edit Upload

Previous versions of CAD can be viewed in the CARM Client Portal.

CAD can be corrected/adjusted.



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Key Change: Release Prior to Payment Program

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What is the Release Prior to Payment (RPP) Program?

- The RPP program entitles Importers to:
 - obtain the release of goods from the CBSA before paying duties and taxes,
 - defer accounting for goods, and
 - defer payment of duties and taxes
- All Importers who wish to participate in the RPP program will be required to enroll in RPP and post financial security.
- Importers will **no longer be allowed to use their Broker's financial security** to participate in RPP.
- Importers that are **not RPP participants** would continue to have the option to pay full duties at the time of release at a port of entry (CASH Entry).

Financial Security for RPP Participants

Cash Security

A Cash Security is a **one-time deposit** that sits in a CBSA account to act as a guarantee against an Importer's account.

Customs Bond

A Customs Bond is provided **by a financial security provider** to guarantee an Importer's account.

Legacy Security forms

Additional forms of security (beyond Cash Security and Customs Bond) that **were used pre-CARM may be available** at Release 2. More information to come.

More information to come on the available providers for Customs Bond.

- The CBSA is developing a plan to help Importers transition to the new requirements, which will include instructions on how to calculate their security, post a Customs Bond and post a Cash Security.
- Details will be shared with Importers and their service providers as soon as the plan is finalized.

How to Calculate the Customs Bond Requirement

If proceeding with a Customs Bond, an Importer will need to post for **50% of the highest monthly Accounts Receivable (AR)** (min of \$25,000/ Importer RM)

January	\$25,000
February	\$25,000
March	\$26,000
April	\$27,000
May	\$23,000
June	\$29,000
July	\$29,000
August	\$58,000
September	\$44,000
October	\$25,000
November	\$42,000
December	\$43,000

Highest AR value

\$58,000

X 50%

\$29,000

Financial security required

How to Calculate a Cash Security Requirement

If proceeding with a Cash Security, an Importer will need to post a Cash Security for **100% of the highest monthly Accounts Receivable value**

January	\$500
February	\$400
March	\$600
April	\$700
May	\$900
June	\$400
July	\$400
August	\$800
September	\$400
October	\$500
November	\$200
December	\$300

Highest AR value

\$900

X 100%

\$900

Cash Security required

The Portal Will Identify the Highest AR Value for the Importer

Calculated security requirement
Program account name Account Name ABC, Inc.
Program account number 123456789RM0001
System calculated security requirement CAN\$ 42,394.28

The Portal will automatically identify the highest monthly AR value.

Based on this value and the type of financial security chosen, an Importer will calculate their financial security coverage needs.

(50% of Highest A/R for a Customs Bond or 100% for a Cash Security).

For example:

Using a Customs Bond:

$\$42,394.28 \times 50\% = \$21,197.14$

Financial security required: \$25,000.00 (minimum Customs Bond requirement)

Using a Cash Security.

$\$42,394.28 \times 100\% = \$42,394.28$

Financial security required: \$42,394.28

Process to Post Financial Security

The RPP program allows the Importer to obtain the release of goods from the CBSA **before payment of duties and taxes**.

Cash Security

Cash Security is a **one-time cash deposit** that the Importer makes using their money to guarantee their account. Upon withdrawal from RPP, the **Cash Security will be refunded** to the Importer account.

Customs Bond

CARM will facilitate the process for capturing financial security via the CARM Client Portal (CCP) and an Application Programming Interface (API) connection with CBSA (for Financial Security providers).

Legacy Security forms

Not supported by the core functionalities of the CARM solution and would require a manual processing.

Financial Security Monitoring

- Notifications or alerts will be sent to Importers on the CARM Client Portal when their account is approaching their financial security limit.
- Importers can monitor their financial security utilization rate through the portal.
- CBSA will continue to holistically review compliance.



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Key Change: Billing Cycles

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Introduction of Harmonized Billing Cycles

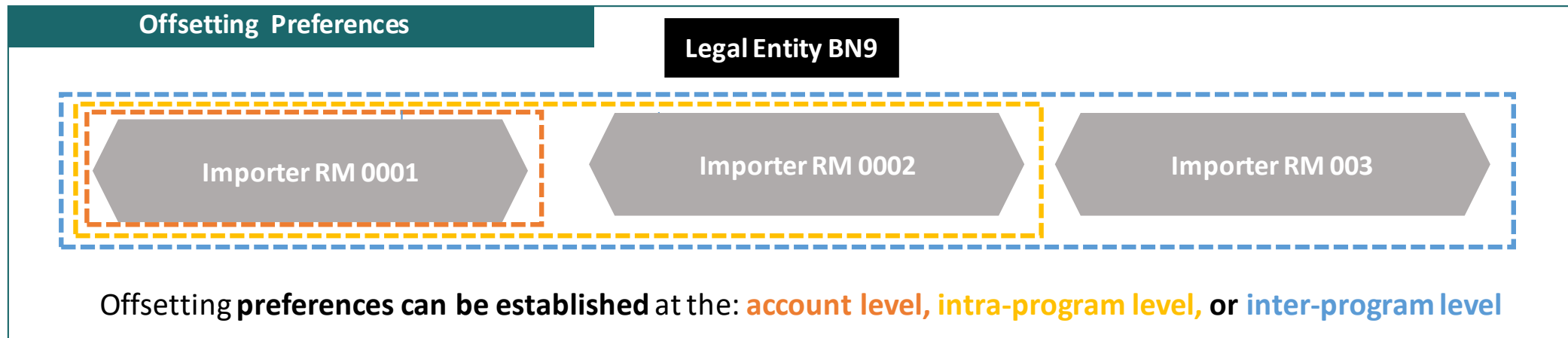
	Cash Clients	Release Prior to Payment Program Participants				
		Regular Commercial Stream	CLVS (Courier Low Value Shipment)	CSA Option A (CSA: Customs Self-Assessment Program)	CSA Option B (CSA: Customs Self-Assessment Program)	CTC (Continuous Transmission Commodity)
Commercial Accounting Declaration (CAD)	Time of release	5 business days after release	24 th of month 2	Until payment due date	Until payment due date	24 th of month 2
Statement of Account (SOA)	25 th of month 2 for all goods released between the 18 th of month 1 to the 17 th of month 2*	25 th of month 2 for all goods released between the 18 th of month 1 to the 17 th of month 2*	25 th of month 2 for all goods released in month 1*	25 th of month 2 for all goods released in month 1*	25 th of month 2 for all goods released between the 18 th of month 1 to the 17 th of month 2*	25 th of month 2 for all goods released in month 1*
Payment Due Date	Time of release	10 weekdays** after the 17 th of month 2				
Correction Period	No Correction period	From CAD submission date to payment due date				
Adjustment Period	From payment period	After payment due date onward				

CARM Billing Cycles and Account Based Clearing

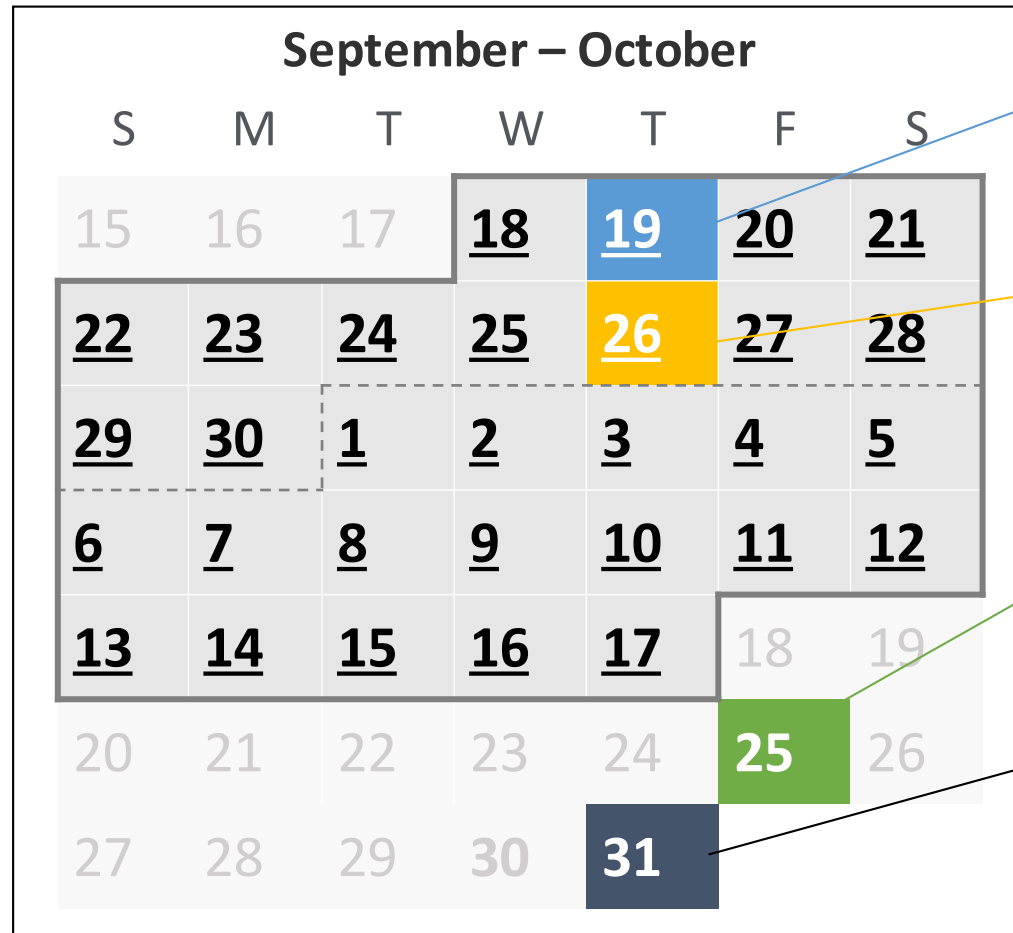
The alignment of the payment due date, and transition to account based clearing will eliminate current accounting complexities

Account Based Clearing:

- CARM R2 simplifies the clearing process for Importers by moving to an account-based model.
- Clearing will run nightly on all due debt according to the offsetting preferences established by the account holder.
- If desired, Importer can choose to allocate and clear a credit against a specific transaction via the CCP.



Billing Cycle Overview for Regular Commercial Stream



Goods Released



CAD Due



SOA

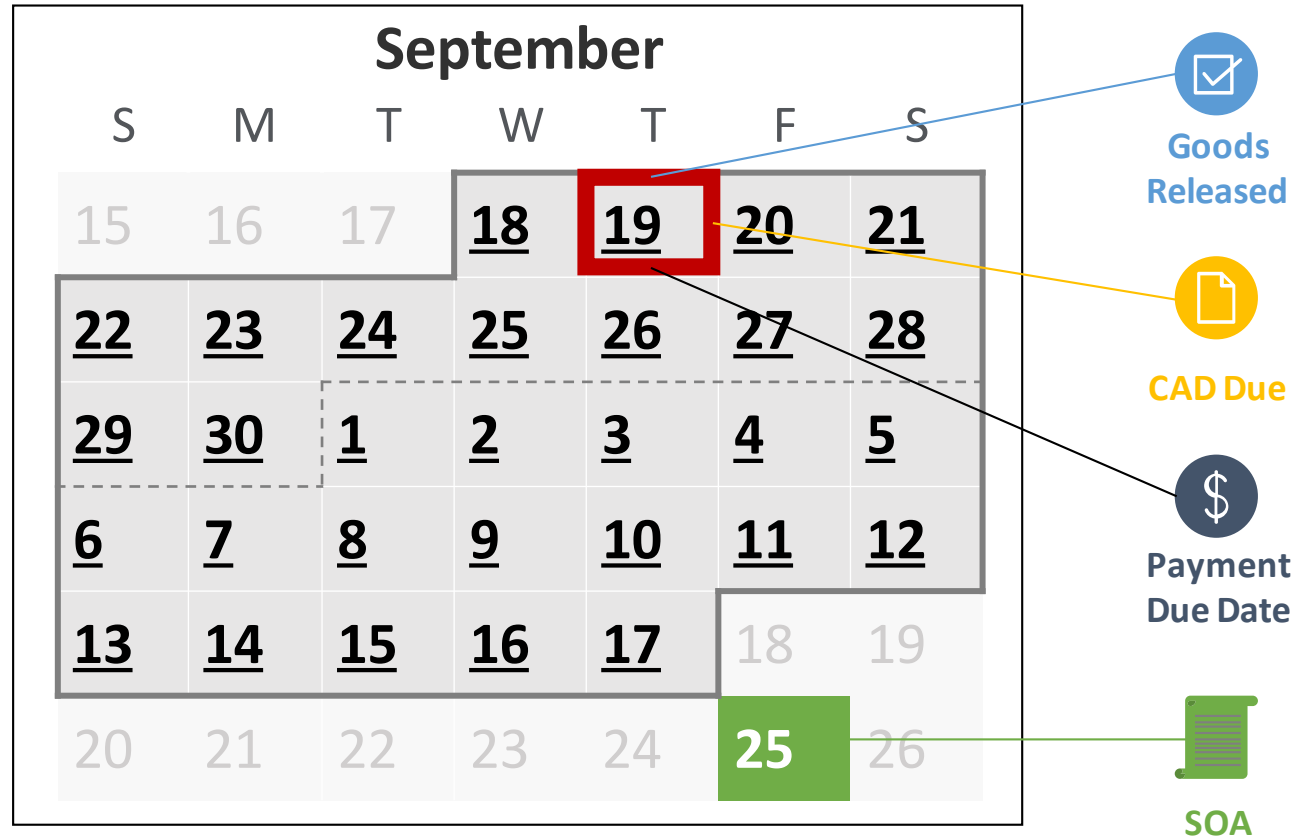


Payment Due Date

Interest-free correction period
(Between CAD submission date and payment due date)

It is the Importer's responsibility to pay the full amount due, including any corrections made after the SOA is generated.

Billing Cycle Overview for Cash Client



C-type (Cash) entry process:

- Importer prepares CAD via the CCP and includes printed version as part of release package (replacing the B3 form) presented to customs office.
- Current CCEPS kiosks to be replaced by access to CCP via new terminal (workstation) at the Ports of Entry



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Key Change: Payments

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Two Types of Payment Options at CARM Release 2

Release Prior to Payment (RPP) (Deferred Payments)

- ✓ Payments made by Importers with RPP privileges who pay the duties and taxes owed post-release
- ✓ Importers have the option to pay via online banking, credit card or Interac® Online, Electronic Data Interchange (EDI), or Pre-Authorized Debit (PAD)

Cash Clients (Non-Deferred Payments)

- ✓ Importers without RPP privileges must pay applicable duties and taxes owing on assessments at the time of release
- ✓ Importers have the option to pay via online banking, credit card or Interac® Online or to pay at a Point of Entry (POE) using the point of sale (POS) system (credit, debit, cash, or cheque)

Account Overview Increases Visibility

Importers have an online view of transactions and Statement of Accounts (SOAs) increasing visibility to account information.

The screenshot displays the CARM Client Portal interface. At the top, it features the Government of Canada logo and the text "Government of Canada" and "Gouvernement du Canada". The main header includes "CARM Client Portal" and "Business Account Manager" with user details "IMP" and "QA". On the right, there are two importer company identifiers: "ImporterCompany4453789... (RM0001)" and "ImporterCompany1247 (445378961)". A "Français" link is in the top right corner. Below the header is a "MENU" dropdown and utility links for "Notifications", "Setup my portal", and "Logout". The main content area is titled "Home" and "Financial information", with a sub-header "View the financial transaction history, statements and invoices of this program account." Below this, there is a section "Services and information" containing six items: "Transaction History" (view live history, review balance, make payments), "Statement of Account" (monthly summary of business activities), "CBSA Invoices" (invoices billed by CBSA), "Collection Letters" (notifications of overdue payments), "Financial Security" (post new bonds, view existing bonds), and "Late Payment Interest Simulation" (simulate interest payments for a timeframe).

A live history of transactions can be viewed.

A static document generated monthly, containing business activities with CBSA can be viewed.

Transaction History

Access is limited to authorized users or via delegation of authority

Transaction history will provide:

- **Account balance** will include all open debits and credits
- **Payable balance** will include open debits and credits based on release date and billing and accounting periods
- Payable balance in an event corrections are submitted after SOA but before payment due date

Transaction History
View a live history of transactions, review the account balance and make payments.

Account details

Account balance	\$ 760,314.26
Payable balance	\$ 760,314.26
Payable balance due by	2022-04-04
Most recent payment posted	\$ 0.00
Most recent payment date	-
Total net open balance (CAD)	\$ 760,314.26

Account credit information

Financial security coverage limit	\$ 0.00
Credit available	\$ 0.00

Allocate credit

Enter the amount you would like to pay

Make payment

Financial transactions | Statistical transactions

Advanced search

Important
Please note that legacy transactions are not displayed on this page. A legacy transaction is any transaction that has been created prior to the availability of the CARM Client Portal.

Ability to filter transactions

Date range: 2021-05-23 - 2022-04-05

Transaction date	Document number	CAD Transaction number	Reference number	Description	Detailed Description
2022-03-01	24500000033	99920220328000	26000001038	Assessment (B3)	Customs C
2022-03-01	24500000033	99920220328000	26000001038	Assessment (B3)	GST Reven
2022-03-01	255000000305	99920220321005	26000000937	Assessment (B3)	Customs C
2022-03-01	255000000305	99920220321005	26000000937	Assessment (B3)	GST Reven
2022-03-01	256000000088	99920220321004	26000000934	Assessment (B3)	Customs C
2022-03-01	256000000088	99920220321004	26000000934	Assessment (B3)	GST Reven
2022-03-01	256000000089	99920220321000	26000000935	Assessment (B3)	Customs C
2022-03-01	256000000089	99920220321000	26000000935	Assessment (B3)	GST Reven

Items per page: 10 | 1 to 10 of 49 | Page 1 of 5

Export to CSV

Option to export to XML or CSV

SOA Allows Importer to View Monthly Transactions

SOA combines multiple transaction types and payment due dates into one statement.

The SOA contains:

- Payments made
- Interest owing
- Credits on accounts
- Disbursements issued
- CAD
- Adjustments
- Corrections (before SOA generation date)

Canada Border Services Agency / Agence des services frontaliers du Canada		Statement of Account (Program Account/ Relevé de compte (Compte de programme))									
Statement summary / Sommaire du RC											
Statement date / Date du RC		18-MAR-2022									
Payment due date / Date d'échéance du paiement		31-MAR-2022									
Payable balance as of Statement date / Total à payer		1587426.83									
Summary of transactions in billing period / Sommaire des transactions 2022-02-18 to / à 2022-03-17											
A. Previous statement balance / Solde d'ouverture			0.00								
B. Corrections to previous statement balance / Corrections au solde d'ouverture			0.00								
C. Payments received after previous SOA / Paiements reçus depuis le dernier RC			4,000.00-								
D. Disbursements / Décaissements			0.00								
E. Late payment interest and all penalties / Total des intérêts et pénalités pour paiement en retard			7.47-								
F. Current period debt (total of all open debits items) / Dette de la période actuelle (total de tous les débits ouverts)			1,591,434.30								
G. Current period credits (total of all open credit items) / Crédits de la période actuelle (total de tous les crédits ouverts)			0.00								
H. Current statement balance / Solde à la date d'échéance			<u>1,587,426.83</u>								
I. Charge breakdown:											
Charge Type / Types de frais											
Customs duty / Droit de douane			429,216.96								
Excise tax / Taxe d'accise			144,387.50								
Excise duties / Droits d'accise			1,242.03								
SIMA / LMSI			383,819.93								
GST / TPS			672,811.62								
HST / TVH			1,000.00								
PST / TVP			0.00								
Payments / Paiements			4,000.00-								
Others / Autres			26,500.00								
Summary by Day during Billing period / Sommaire quotidien, période de facturation 2022-02-18 to / à 2022-03-17											
For BN15 / Pour le NE15 445378961RM0001											
Release Date / Date de la mainlevée	Accounting Date / Date comptable	Custom Duty / Droit de douane	Excise Tax / Taxe d'accise	Excise Duties / Droits d'accise	SIMA / LMSI	GST / TPS	HST / TVH	PST / TVP	Payments / Paiements	Others / Autres	Daily Total / Total quotidien
31-DEC-2018	06-DEC-2021	0.00	0.00	0.00	0.00	125.00	0.00	0.00	0.00	0.00	125.00

Statement Summary will detail payment due date and payable balance.

Multiple transaction types are displayed.

Available Methods for Making a Payment in CARM

Payment Channel	Payment Method	Limit (in \$CAD)	CBSA Approved Bank Required?
Electronic Payment	Online via CCP (Credit Card and Interac)	5K for Credit Card 100K for Interac	N/A
	Online Banking	Unlimited	Yes
	Electronic Data Interchange (EDI)	Unlimited	Yes
	Pre-Authorized Debit (PAD) (One-time and On-going)	100M	Yes

Online via CARM Client Portal

Credit Cards Accepted:

- Visa
- MasterCard
- American Express
- Visa Debit
- Debit MasterCard

Debit Cards Accepted:

Financial Institutions
that are signed up for
Interac payments
through Moneris

CARM Online Banking

Online banking is currently offered by:

- Royal Bank of Canada (RBC)
- Scotiabank
- TD Canada Trust
- Bank of Montreal (BMO)
- Canadian Imperial Bank of Commerce (CIBC)
- National Bank
- HSBC
- Desjardins
- Citibank
- Laurentian Bank
- Central One Credit Union
- ATB Financial
- Bank of America
- JP Morgan Chase
- Shinhan Bank of Canada
- Tangerine
- Meridian

The CBSA is currently in discussions with other Financial Institutions regarding EDI and online banking. Please refer to the Payment Page on [CBSA website](#) for more details



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Key Change: Reporting

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Importers Have Access to Multiple Types of Reports

Financial Transactions
Transaction History Transaction number, description and values of the posted financial transactions on your account

Declarations Submitted	
CAD Reporting Header, vendor and item data of the submitted declarations including calculated duties and taxes	Pre-CARM Report B3/B2 Submitted to CBSA pre-CARM

Financial Transactions can be Exported Instantly

The screenshot shows a web interface for 'Financial transactions'. At the top, there are two tabs: 'Financial transactions' (selected) and 'Statistical transactions'. Below the tabs is an 'Advanced search' dropdown menu. A light blue 'Important' notice states: 'Please note that legacy transactions are not displayed on this page. A legacy transaction is any transaction that has been created prior to the availability of the CARM Client Portal.' Below the notice is a 'Date range' filter set to '2021-05-23 - 2022-04-05'. The main content is a table with the following columns: Transaction date, Document number, CAD Transaction number, Reference number, Description, and Detailed Description. The table contains 8 rows of transaction data. At the bottom of the table, there is a pagination control showing '1 to 10 of 49' and 'Page 1 of 5'. An 'Export to CSV' button is located at the bottom left of the interface.

Transaction date	Document number	CAD Transaction number	Reference number	Description	Detailed Description
2022-03-01	24500000033	99920220328000	26000001038	Assessment (B3)	Customs D
2022-03-01	24500000033	99920220328000	26000001038	Assessment (B3)	GST Reven
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2022-03-01	256000000089	99920220321000	26000000935	Assessment (B3)	GST Reven

Export can be modified to include transactions you need

Ability to filter transactions by date

Fields required can be modified

All entries will be included in CSV export

CAD Reports will be Available in Downloadable Format

Home > Declarations > List of submitted declarations

Reporting

Access data related to the activities of the program under which you are currently working. Customize the report you want to download using the available search parameters and field filters.

I want to...

View a report of my financial transactions

View the list of requested declarations reports

View my Transaction History

View

1. Choose a report

* Report Type (required)

CAD report

Report type description
Detailed information on submitted CADs, including calculated duties and taxes.

* Accounting date (required)

2022-01-05 - 2022-04-05

* Declaration type (required)

Select an option

Add additional

AB - With Release X C - To Obtain Release of Goods X V - Voluntary X

Advanced filter

Fields

Place of Export Code

Value

United States of America

Add criteria

Show only most recent version

Search

Clear

CAD Report can be customized to export data you need.

Declaration No.	Importer Address	Importer City	Importer Country	Importer Postal Code	Importer Region	CAD Transaction No.	Declaration Type	Place of Export	Accepted Date	Release Date	Cargo Control No.	Customs Code	Vendor No.
1140403010002	7140403010002	Victoria Street	City2448	US	90000	9990202021000	V	US	2022-03-21	2022-03-01	500	500	Vendor 1
						9990202021001	V	US	2022-03-21	2022-03-01	500	500	Vendor 1
						9990202021003	V	US	2022-03-21	2022-03-01	500	500	Vendor 1
						9990202021004	V	US	2022-03-21	2022-03-01	500	500	Vendor 1
						9990202021005	V	US	2022-03-21	2022-03-01	500	500	Vendor 1
						9990202021006	V	US	2022-03-21	2022-03-01	500	500	Vendor 1
						9990202021007	V	US	2022-03-21	2022-03-01	500	500	Vendor 1
						9990202021008	V	US	2022-03-21	2022-03-01	500	500	Vendor 1
						9990202021009	V	US	2022-03-21	2022-03-01	500	500	Vendor 1
						9990202021010	V	US	2022-03-21	2022-03-01	500	500	Vendor 1

- Importers can customize fields then submit a request for the report to CBSA. Service standards will be shared at a future date.
- CBSA will generate the report and make available in the Importer's CARM Client Portal account for download into a CSV format.

Pre-CARM Report Can Be Requested

Reporting

Access data related to the activities of the program under which you are currently working. Customize the report you want to download using the available search parameters and field filters.

Importers can easily request historical information

I want to...

View a report of my financial transactions ⓘ View the list of requested declarations reports ⓘ

[View my Transaction History](#) [View](#)

1. Choose a report

*** Report Type (required)**
Pre-CARM report

Report type description
Historical Report for any B3 declarations submitted prior to the transition to the CAD form

How to proceed
To request a historical report for your Pre-CARM declarations (B3), you must send an email to CBSA-ASFC_FIRM-SREG@cbsa-asfc.gc.ca.

Please note that you must provide the following information within that email:

- The 15 digit business number(s) (BN15) you are requesting a historical report for
- A date range on imports you would like the report to reflect
- If the request is sent by your service provider, ensure that they have an approved business relationship for the BN15s listed above on the CARM Client Portal (CCP).

Once you have completed the above, you can request your historical report via email to CBSA-ASFC_FIRM-SREG@cbsa-asfc.gc.ca.

You can monitor the progress of your request by navigating to the list of requested declarations reports. A shortcut is available at the top of this screen.



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Next Steps & Additional Resources

Canada

CARM | CBSA Assessment and
Revenue Management

Next Steps – Preparing for the CARM Client Portal



If you haven't registered your business to the CARM Client Portal, you can register today!

- Attend an onboarding webinar to learn step by step instructions on how to register to the CARM Client Portal.



More information is coming to help Importers understand and prepare for the Release 2 of the CARM Client Portal.

- A new webinar series will be launched in advance of Release 2 go-live. The series will showcase portal functionalities in more detail.
- User guides with visuals and instructions will be released a few months prior to Release 2. These user guides can be accessed through the CARM Google Drive and the CARM website.

Sign up to the email distribution list to get project **updates, resources** and **key dates**.

Available Resources (Current and Future)

	Resource	Description
Current	Registering your Business on the CARM Client Portal	Reference sheet to assist in gathering the required information before starting the business registration process.
	User Guides	Detailed information on specific functionality, incl. screenshots and step-by-step guided information.
	Educational Videos	Step by step videos are available on the CBSA Website (video gallery) and the CBSA YouTube Channel.
Future New resources to come out:	Short materials (1-pager)	Basic R2 functionality to quickly understand how they work.
	Recordings	What You Need to Know with CARM Release 2 Webinar will be recorded and posted.
	Educational Videos	Step by step videos on R2 functionalities will be available on the CBSA Website (video gallery) and the CBSA YouTube Channel.

Access the [Onboarding Documentation](#) on the CARM Client Portal and YouTube Videos from the [CBSA Website](#) or [CBSA YouTube Channel \(CARM Playlist\)](#)

CARM Client Support Help Desk (CCSH)

Dedicated client service support that will work with ARL, BIS and the TCCU helpdesks.

Available NOW:

Web Contact Form

- Form will prompt requestor for information, allowing the CBSA to address the request in a targeted and expedited manner (Click here for [Web Contact Form](#))
- CCSH will return a reply email with a ticket number to acknowledge receipt of the request
- Client Service Representative will provide a written response to the request

Telephone

- Telephone service will be provided through the Border Information Services telephone line: 1-800-461-9999, menu Option 2 – CBSA Assessment and Revenue Management

All methods of contact will result in a follow-up email response.



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Questions & Answers Period

Canada

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Thank You!

For more information:

- Visit the [CARM CBSA website](#)
- Link to the [CARM Client Portal](#)
- Visit the [CARM Google Drive](#) for resources
- Join the [CARM LinkedIn Group](#) for the latest news
- Questions? Email: CBSA.CARM_Engagement-Engagement_de_la_GCRA.ASFC@cbsa-asfc.gc.ca
- Join the email distribution list by emailing CBSA.CARM_Engagement-Engagement_de_la_GCRA.ASFC@cbsa-asfc.gc.ca