



GETTING READY FOR CARM: PREPARE TO BE ONBOARDED

Identifying a CARM Project Lead

Why do I need a CARM Project Lead?

The implementation of the CBSA Assessment and Revenue Management (CARM) Client Portal constitutes a major shift in how importers and their service providers will manage their accounting activities with CBSA, and places greater onus on importers to be engaged in, have oversight of, these activities. **CPMA strongly recommends that businesses identify someone within their operation who will be responsible for getting the company set up in the CARM portal.**

What tasks will my CARM Project Lead need to perform?

Setting up your business in the CARM Portal and putting a system in place to ensure your accounting runs smoothly when the Portal goes live will require dedicated resources. An effective CARM Project Lead will need to perform a variety of tasks, including:

- Registering your business in the CARM Portal and setting up your profile;
- Working with your customs broker or other service provider to determine how active you want to be within the Portal as the importer and what level of access and responsibility you want to delegate to them;
- Identifying which employees and/or service providers should have access to company information or be able to perform actions on the company's behalf within the Portal, including who should act as Business Account Manager(s), and delegating authority within the Portal accordingly;
- On an ongoing basis, perform general Portal administration and keep your business' information up to date; and
- Auditing the activities of those who have been delegated authority to work on your business' behalf.

Key Points for Consideration

- **Involve your service providers in your planning for CARM.** If you work with a customs broker or other service provider, and are going to continue to do so, we strongly recommend that you work with them on your plan for CARM implementation to ensure they are set up in the Portal before you proceed with onboarding your company.
- **Don't wait until the last minute!** Being onboarded into CARM and putting the necessary systems in place to manage your ongoing activities in the Portal will require thoughtful consideration of your company's needs. Start planning now!
- **Ensure that your CARM Project Lead has access to all the information they need to be able to perform their tasks effectively.** This includes the data points and company information required to complete the registration and delegation of authority processes. For example, they must be able to enter the company's legal name and legal address, which must match exactly what is on file with the Canada Revenue Agency. See CBSA's [*Information Sheet – Registering a Business on the CARM Client Portal*](#) for more details.

This document was prepared in consultation with the Canada Border Services Agency (CBSA) to provide a practical resource to support CARM implementation