Linking Employees to Your Company's CARM Client Portal Account

Steps 1-11 review the steps each individual employee must take to create their CARM Client Portal individual account.

Steps 12-15 review how the employee requests access to the company's CARM Client Portal Account (I.e., link their individual account to the company's account).

Step 16-17 review what the Business Account Manager (BAM) for the company's CARM Client Portal account must do to link the employee to the account.

1. Log in to the Portal using either a Sign In Partner or a GC Key. CARM Client Portal website: https://ccp-pcc.cbsa-asfc.cloud-nuage.canada.ca/en/auth/login

2. **Sign In Partner:** If they have an active account with the any of the banks or credit unions on the list, they can choose this sign in method. They would simply use the same login credentials, but they will be logging into the CARM Portal and not the actual account with their financial institution. The accounts are completely separate.

3. **GC Key:** For anyone not wanting to or not able to use a Sign In Partner. Anyone that already has a GCKey can use the same login – except if it is for MyCRA. They cannot use a GCKey for MyCRA and would need to create a new GCKey for the CARM Portal.

4. Once logged in, they would create a Username, Password and Password Recovery Options

5. Then they have to further secure the account by creating a multi-factor authentication which is an additional email where a passcode will be sent each time they attempt to login.

6. Then a passcode will be sent to their MFA email and they would enter the 6-digit PIN into the CARM Portal screen

7. They should then click on 'Continue to CARM Client Portal'

8. Accept Terms and conditions

9. Since this is the first time they are logging in to the Portal, they will be prompted to create a Personal Profile.

10. They should enter the details and if they need to change in future they can do so in 'Account Settings'.

11. They then need to create 3 Security Questions

12. Next they can finally link their individual account to the company Business Account

13. **IMPORTANT**: They should click on **'Request Access to my Employer'.** Make sure they don't click on 'Register my Business'

14. **Note**: The company Business Account must already be created on the Portal to link employees.

15. The employee will then enter the 9 digit business number of the company and provide a reason for requesting access

16. The BAM for the business can then log in to the CARM Portal using their individual login credentials and they will find all the employee access requests under the link for: Pending Employee Requests

17. The BAM assigns a User Role to the employee: Business Account Manager, Program Account Manager, Editor or Reader. Refer to the chart below or the 'CARM R1 User Guide: Delegation of Authority for more information.

Employee User Roles for the CARM Client Portal

User groups / Resources	BAM	PAM	Editor	Reader
Organization (Business profile information, list of programs)	Edit	No access	No access	No access
Users access (Manage pending requests, manage list of users)	Edit (assign users to business and programs)	Edit (assign users to program)	No access	No access
Business relationships (Send a request, manage pending requests, manage existing relationships)	Edit	Edit (can only send a new request)	No access	No access
Upload documents (Upload a new document)	Edit	Edit	Edit	No access
Program (Program profile information)	Edit	Edit	No access	No access
Finance (Transaction history, Statement of Account (SOA), invoices)	Read	Read	Read	Read
Payment (Credit allocation, credit card payment and interact payment)	Edit	Edit	Edit	Read
Pre-Authorized Debit (Banking information)	Edit	No access	No access	No access
Rulings (Ruling requests and decisions)	Edit	Edit	Edit	Read