



## Information Notice: Portal and Other ESAR A2.2 Changes (For All Account Types)

Effective April 12, 2009, U.S. Customs and Border Protection will be deploying enhanced ACE capabilities within the Entry Summary, Accounts and Revenue A2.2 release. The A2.2 release will:

1. Improve ACE portal navigation.
2. Provide new and enhanced ACE portal reports.
3. Allow importers to view and respond to CBP Forms 28, 29 and 4647 via the ACE portal for ACE entry summaries.
4. Allow importers to respond to certain post summary requests for documents via the ACE portal for ACE entry summaries.
5. Allow importers to create and maintain specific declaration records in ACE.
6. Allow Census warnings to be electronically overridden prior to or after receiving a Census warning message in ABI for ACE entry summaries.

### Navigation Changes

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1. There is no longer an “Action” drop down list in the portal. All functionality has been moved to the “Home,” “References” or “Tools” tab.



- “ACE News” is now located on the “Home” tab. 
  - “Manage Access” is now located on the “Tools” tab under “User Account Administration.”
  - “Manifest” is now located on the “Tools” tab under “Manifest Tools.”
  - “References” are now located on the “References” tab.
2. The “feedback” icon is no longer displayed. Users should contact the Technology Support Center for all issues.
  3. The “change password” icon is no longer displayed. The “change password” link can be found under the “Tools” tab.





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- The “*account switcher*” icon, that allows users with access to multiple ACE Portal accounts to change accounts without having to sign off, has changed. The user simply clicks the new “*account switcher*” icon and selects the account they want to access. 

These four tabs will be displayed when any trade user logs into their ACE portal account.



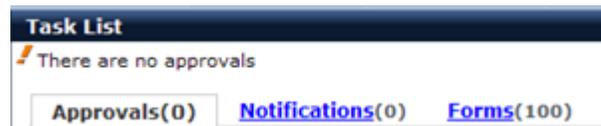
- With ESAR A2.2 and going forward, when a Trade Account Owner (TAO) or Proxy TAO grants access to a user, they are in effect granting that user access to the various links contained under each of the four tabs. The links are equivalent to the “*Authorized Tab Access*” privileges granted under “*User Access*.”
- TAOs will need to grant user access, on an as needed basis, to the three new links: “*CBP Forms*,” “*Declarations*” and “*Mode of Communication*.”

### Home Tab



- Task List**

The “*Home*” tab contains the “*Task List*” portlet with links for “*Approvals*,” “*Notifications and Forms*,” “*Phone Directory*,” “*Reminder*,” “*Quicklinks*” and “*ACE News*.” Only the TAO and Proxy will see the “*Task List*.” However, if a trade user is granted access to “*Forms*,” they will be able to view and respond to CBP Forms 28, 29 and 4647 through the “*Forms*” portlet on the “*Home*” tab.



- Forms Portlet**

The “*Forms*” portlet contains two hyperlinks.





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1. The “*Upload Documents*” link is for CBP generated post summary requests for documents. Additional information will follow on how to respond to documents requested via the ACE portal.
2. The “*Search Forms*” link allows authorized users to search for forms. Users must enter criteria in two of the data fields before clicking the “**Search**” button. Users may enter criteria in more than two fields to further define the search.



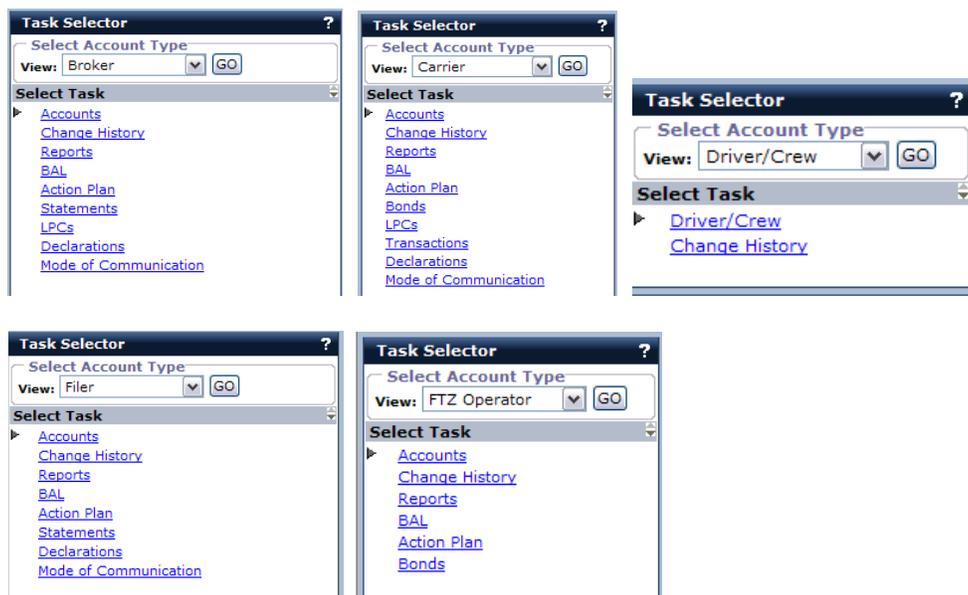
For “Forms,” the TAO can only grant “No Access” or “Full Access.” There is NO “Read Only” access option.

Additional information will follow on how to view and respond to CBP Forms. Users will be able to view and save the form in a PDF format as well as add an attachment.

### Accounts Tab

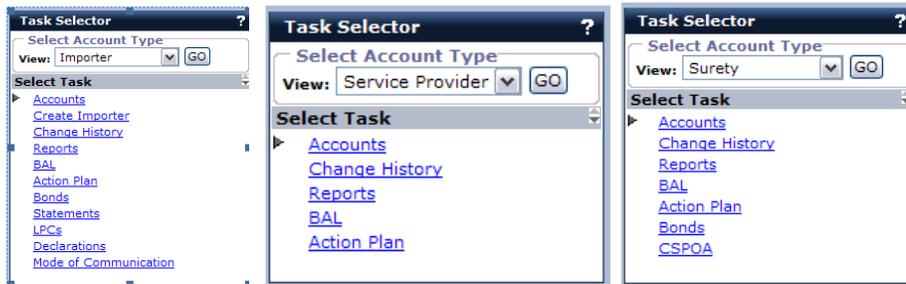


- **Task Selector (Select Account Type)**





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The “*Accounts*” tab houses the “Task Selector” where the user will go to change “*Account Types*” by following the steps below:

1. Select the appropriate view in the drop down under “*Select Account Type*.”
2. Click “**Go.**”

The links available will vary based on the Account Type selected.

- **Account Selector List**



The “*Account Selector List*” (currently the “*Account List*”) will be displayed in account name order. To view the account list by IR number, for example, the user will:

1. Select the radio button next to “*IR number*” under “*View Settings/View By.*”
2. Click “**Go.**”

The “*Edit*” and “*Print*” buttons previously located in the “*Account List*” have been replaced by the edit  and printer  icons. Select the



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 icon to add IR numbers or SCAC codes to your “*Account Selector List.*” Select the  icon to print your “*Account Selector List.*”

To view sub-account detail, simply click the link associated with the sub-account name and the sub-account information will be displayed.

- **Reports Link**



The “*Reports*” link will direct users to all ACE reports. There will be six new trade reports, three of which can be found within the “*Entry Summary*” folder:

1. “*ESM 7001 Entry Summary Census Warning and Override*”
2. “*ESM 7008 Entry Summary Line Detail Report*”
3. “*ESM 7068 Entry Summary Report*”

Within the “*Entry Summary*” folder, there will be a sub-folder called “*Trade Actions*” and it contains:

- “*ESM 7024 ACE Reject Report*”
- “*ESM 7025 CBP form 28, 29, 4647 Status Report*”

Another new sub-folder called “*Declarations*” can be found under the “*Account Management*” folder. The “*Declarations*” sub-folder contains:

- “*AM 7002 Trade Declarations*”



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The new Entry Summary reports mentioned above will only include data for ACE entry summaries. All current Account Management and Account Revenue reports will include data for all entries/entry summaries regardless of the system of record for the entry summary (ACE vs. ACS).

- **Declarations Link**

The “*Declarations*” link allows the user to create and maintain declaration records based on access privileges granted by the TAO. Declaration records that can be posted to the importer’s account at the IR level include:

- “*Affidavit of Manufacturer*”
- “*Importer Certifying Statement*”
- “*Non-Reimbursement Blanket Statement (AD/CVD)*”
- “*North American Free Trade Agreement Certificate of Origin.*”

Declaration records can be posted for all entry summaries. Users also have the ability to add attachments to the declaration records posted.

Importers, brokers, carriers and filers will be able to submit declaration records which are associated at the importer of record level in the account. Users also have the ability to search for declaration records within their account by clicking the “**Filter**” button. Users must enter criteria in two of the data fields before clicking the “*Filter*” button. Declaration records can be searched at the top account level or at the sub-account (importer of record) level.

Additional information will follow on how to create and view declaration records.



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- **Mode of Communication link**

The “*Mode of Communication*” link allows the user to set up, view and maintain the preferred mode(s) of communication for CBP forms, based on access privileges granted by the TAO.

Modes:  Mail  
 Portal

Apply these setting to all accounts under this account (for this account type)?  
 Yes  No

Save Cancel

- The mode of communication can be selected at the top account level or for each individual importer number. The user can elect to receive forms via mail, via the portal or both.
- While carriers, brokers and filers will see the “*Mode of Communication*” link, the functionality is only available to importers at this time.

### References Tab



The “*References*” tab contains all reference files available to the trade including “*HTS*,” “*Tariff History*,” “*Port*,” “*Gold Rate*,” “*Currency Exchange*,” “*Country Code*,” “*MID*” and “*UN Loc Code*.”



### Tools Tab

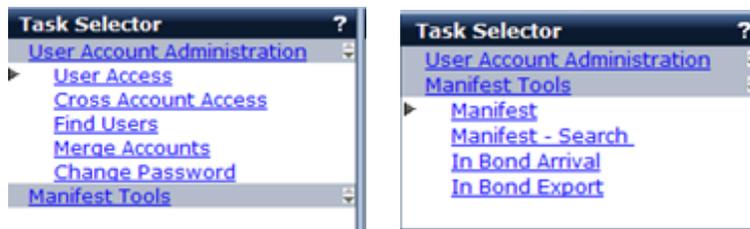


The “*Tools*” tab contains “*User Account Administration*” and “*Manifest Tools*.”



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- “*User Account Administration*” includes “*User Access*,” “*Cross Account Access*,” “*Find Users*,” “*Merge Accounts*” and “*Change Password*” links.
- “*Manifest Tools*” are only applicable to truck carrier accounts. “*Manifest Tools*” includes “*Manifest*,” “*Manifest Search*,” “*In-Bond Arrival*” and “*In-Bond Export*” links.
- All users will have access to the tab for “*Change Password*.” Other links are dependent on the user’s role as assigned by the TAO.



### Census Overrides

The trade community will have the ability to correct Census Warnings electronically on ACE entry summaries (type 01 or 11) through the transmission of an override code. (See 73 **FR** 50337, published August 26, 2008 and 74 **FR** 9826, published March 6, 2009 for additional information on the National Customs Automation Program Test Concerning Automated Commercial Environment (ACE) Entry Summary, Accounts and Revenue). Example scenarios for Census overrides are:

- If you know that a Census warning will be generated for the entry summary/line item, you will be able to do a preemptive Census override when filing the entry summary.
- If you receive a Census warning due to an error in reporting, you will be able to fix the entry summary/line item and then report the Census override code if needed.
- If you file the entry summary and receive a Census warning but you know the data is correct, you will be able to send the Census override code.



*Appendix H of the ACE Automated Broker Interface (ABI) Customs and Trade Automated Interface Requirement (CATAIR) posted on CBP.gov provides a list of Census warning messages, the reasons filers may receive the warning message, suggestions for resolving the warning and override codes which may be used to respond to the message.*