



# National Broker Permit

Modernized ACE Portal

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U.S. Customs and  
Border Protection





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## TOPIC 1: MODERNIZED ACE PORTAL

### INTRODUCTION

This QRG provides guidance on logging in and navigating to National Broker Permit on the Modernized ACE Portal.



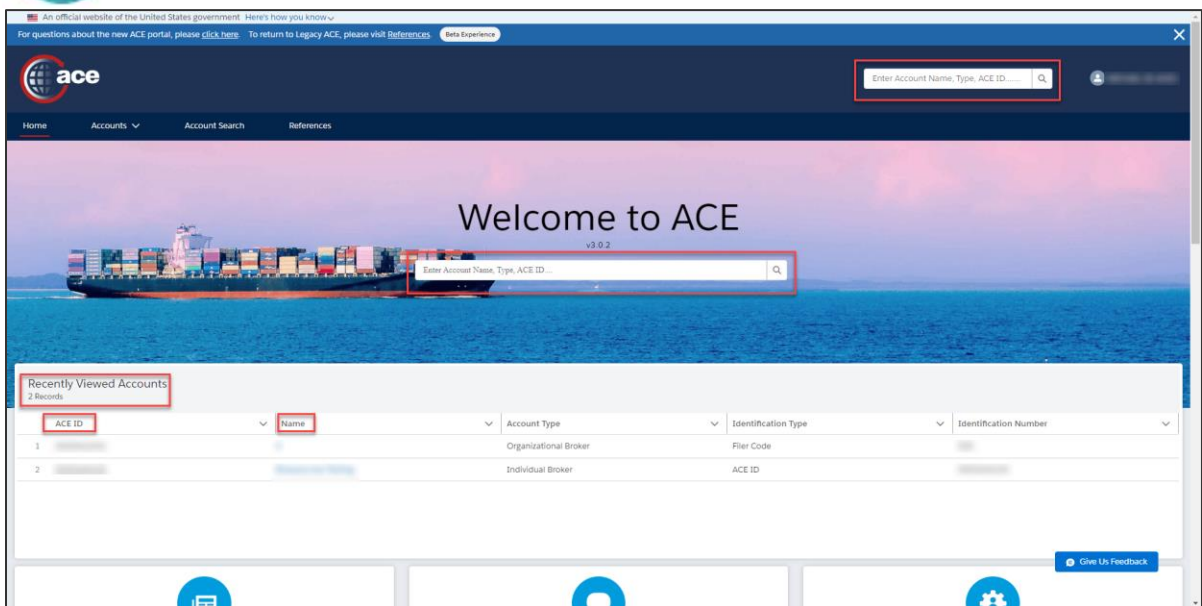
**IMPORTANT:** The first time you log in to the Modernized ACE Portal, you will link your Legacy ACE Portal to your Modernized ACE Portal. For more information, reference **Log into the Modernized ACE Portal** section in the [Modernized ACE Portal: Account Types](#) Quick Reference Guide (QRG).

### NAVIGATE TO AN ORGANIZATIONAL BROKER ACCOUNT

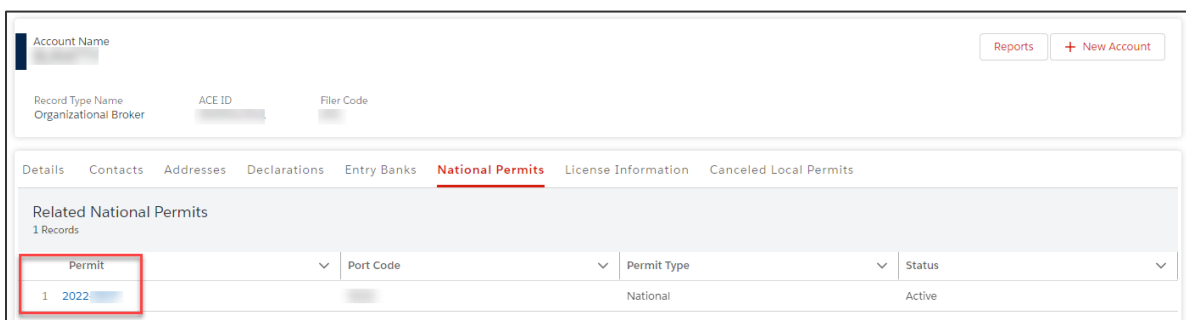
1. In the **Welcome to ACE** home page, in the **Search** field, type *search criteria for the broker account*.



**NOTE:** If you have recently viewed an account, you may also select the account in the **Recently Viewed Accounts** table.



2. In the broker account, select the **National Permits** tab.
3. In the **National Permits** tab, select the **Permit** hyperlink.





## TOPIC 2: NATIONAL BROKER PERMIT

### INTRODUCTION

CBP Broker Management Officers (BMO) now create and edit broker license national permit details in the modernized ACE Portal. On December 19, CBP transitioned all brokers (with district permits) to a national permit. CBP canceled all district permits, but they remain visible in the modernized ACE Portal. Specifically, for Organizational Broker accounts, a new **Canceled Local Permits** tab displays historical district permit information.

### HOW TO VIEW NATIONAL PERMITS

1. In an organizational broker account, select the **National Permits** tab.
2. Select the hyperlink of the permit you want to view.

Account Name: [Redacted] Reports + New Account

Record Type Name: Organizational Broker    ACE ID: [Redacted]    Filer Code: [Redacted]

Details    Contacts    Addresses    Declarations    Entry Banks    **National Permits**    License Information    Canceled Local Permits

Related National Permits  
1 Records

Permit	Port Code	Permit Type	Status
<a href="#">1 2022</a>	[Redacted]	National	Active

The **Details** pane displays.

Account Navigation: Port: National 2022

Account Name: [Redacted] Reports Print Permit + New Account

Record Type Name: Broker Permit    ACE ID: [Redacted]    Issuing Port Code: [Redacted]    Permit #: 2022-    Permit Type: National

**Details**    Addresses    Contacts    Licensed Brokers    Employees    Permit User Fees    Documents

Account Information

Account Name: [Redacted]    ACE ID: [Redacted]

Permit Information

DBA: [Redacted]    Permit #: 2022-0837

Permit Type: National    Status: Active

Issuing Port: [Redacted]    Issuing Date: 11/15/2022

Port of Application: [Redacted]    Authorized CBP Official: Executive Director, Trade Policy & Programs, Office of Trade

BMO Comments: [Redacted]

BMB Comments: [Redacted]

Permit Qualifier Information

Qualifier Name: [Redacted]    Qualifier ACE ID: [Redacted]

Qualifier License Number: [Redacted]    Qualifier Start Date: [Redacted]

Qualifier End Date: [Redacted]

Permit Documents Received Give Us Feedback

Permit Documents Received





## HOW TO VIEW A HISTORICAL PERMIT

1. In an organizational broker account, select the **Cancelled Local Permits** tab.
2. Select the hyperlink of the permit you want to view.

The screenshot displays the ACE system interface for an organizational broker account. At the top, there is a header with the account name and a 'Reports' button. Below this, there are fields for 'Record Type Name' (Organizational Broker), 'ACE ID', and 'Filer Code'. A navigation menu includes tabs for 'Details', 'Contacts', 'Addresses', 'Declarations', 'Entry Banks', 'National Permits', 'License Information', and 'Cancelled Local Permits'. The 'Cancelled Local Permits' tab is selected and highlighted in red. Below the navigation menu, there is a section titled 'Related Broker Permits' with a sub-header '2 Records'. A table lists two records with columns for 'Permit', 'Port Code', 'Permit Type', and 'Status'. Both records are of type 'Local' and have a status of 'Active'.

Permit	Port Code	Permit Type	Status
1		Local	Active
2		Local	Active





## TOPIC 3: VIEW LICENSE INFORMATION AND APPLICATION

### INTRODUCTION

You can access Licenses, License Applications, Triennial Fees, and Corporate Officers directly from the **License Information** tab of an Organizational Broker.

### VIEW AND ADD LICENSES

1. In an organizational broker account, select the **License Information** tab.

License #	Name on License	Date of Issue	Issuing Port	Status
1				

2. Select **Licenses**.
3. In the **License #** column, select the hyperlink to display information about the license.
4. If required, select the **Add License Info** button to add a license.



**IMPORTANT:** **Add License Information** only displays when there is an approved License Application and no other active License records.



**NOTE:** Required fields are indicated by an asterisk.

### VIEW AND ADD LICENSE APPLICATIONS

1. In an organizational broker account, select the **License Information** tab.

Date of Application	Status	CBPF 368#	Fee Amount	Date Paid	Withdrawal Date
1	Approved				

2. **Select License Applications.**
3. If required, select the **Add License Application** button to create a new license.





**NOTE:** Required fields are indicated by an asterisk.

## VIEW AND ADD TRIENNIAL FEES

1. In an organizational broker account, select the **License Information** tab.

The screenshot shows the 'License Information' tab selected in a web application. The navigation bar includes 'Details', 'Contacts', 'Addresses', 'Declarations', 'Entry Banks', 'National Permits', 'License Information' (highlighted), and 'Canceled Local Permits'. Below the navigation bar, there are sub-tabs: 'Licenses', 'License Applications', 'Triennial Fees' (highlighted), and 'Application Listed Officers'. The main content area is titled 'Related Triennial Fees' and shows '1 Records'. A table with columns 'License #', 'Port', 'Fee Year', 'Due Date', 'Fee Amount', 'Date Paid', and 'Receipt Number' is visible. A red button labeled 'Add Triennial Fee' is located in the top right corner of the table area.

2. Select **Triennial Fees** for information about Fees.
3. If required, select the **Add Triennial Fee** button to create a new triennial fee.



**NOTE:** Required fields are indicated by an asterisk.

## VIEW AND ADD APPLICATION LISTED OFFICERS

1. In an organizational broker account, select the **License Information** tab.

The screenshot shows the 'License Information' tab selected in a web application. The navigation bar includes 'Details', 'Contacts', 'Addresses', 'Declarations', 'Entry Banks', 'National Permits', 'License Information' (highlighted), and 'Canceled Local Permits'. Below the navigation bar, there are sub-tabs: 'Licenses', 'License Applications', 'Triennial Fees', and 'Application Listed Officers' (highlighted). The main content area is titled 'Application Listed Officers' and shows '2 Records'. A table with columns 'Name', 'DOB', 'Phone', and 'Email' is visible. A red button labeled 'Add Corporate Officer' is located in the top right corner of the table area.

2. Select **Application Listed Officers** for a listing of Officers.
3. If required, select the **Add Corporate Officer** button to add an Officer.



**NOTE:** Required fields are indicated by an asterisk.

