National Broker Permit

Modernized ACE Portal

June 2023

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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.
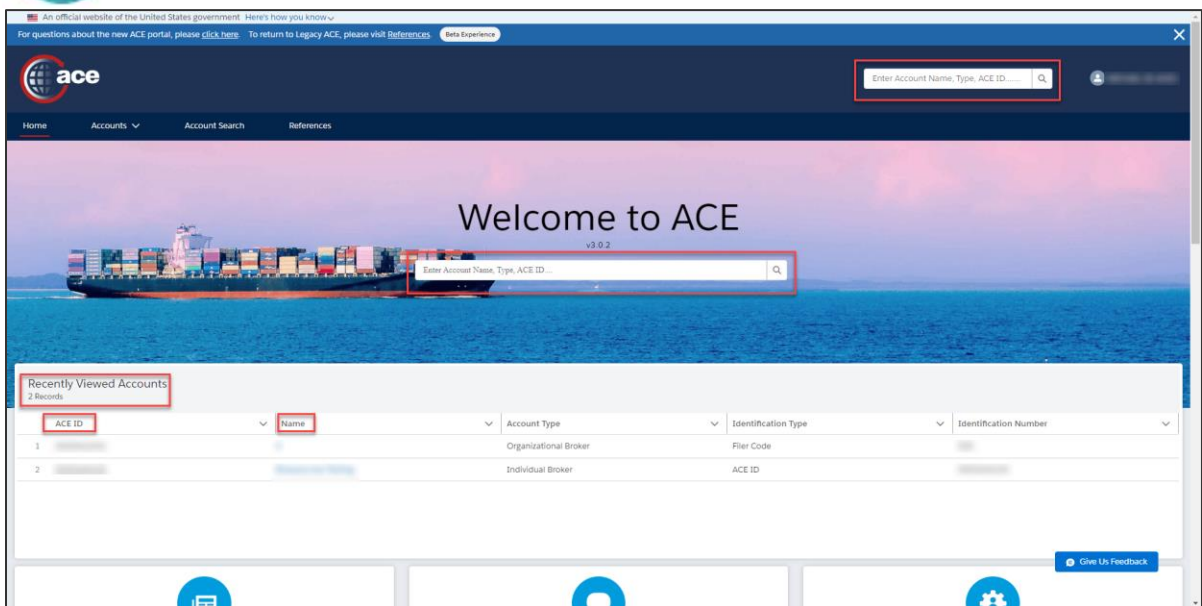
2. In the broker account, select the **National Permits** tab.
3. In the **National Permits** tab, select the **Permit** hyperlink.
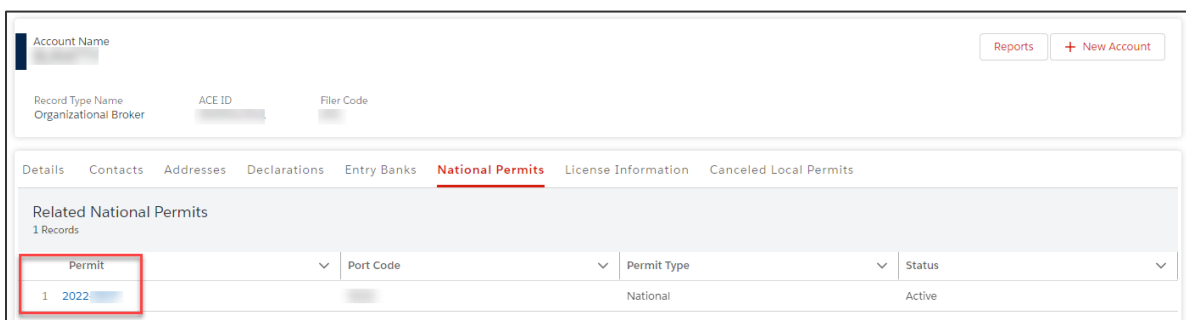
TOPIC 2: NATIONAL BROKER PERMIT

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.

The **Details** pane displays.

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.

Account Name					Reports	

Record Type Name	ACE ID	Filer Code				
Organizational Broker						

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

Related Broker Permits
2 Records

	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.

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.

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.

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.

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.