ACE Modernized Portal

Statements Calendar and Designation

May 2024

U.S. Customs and
Border Protection

INTRODUCTION

The Statements feature of the Modernized ACE Portal allows users with proper authorization to view and edit Periodic Monthly Statement (PMS) information in an importer, organizational broker, or filer account. Accounts must participate in PMS to edit statements.

The PMS pay date defaults to the 11th workday of each month. The PMS statement date defaults to the 15th workday of each month. Use the **Periodic Statement Calendar** section to request an earlier statement date for the following eleven months; the current month is locked and not editable.

ORGANIZATIONAL BROKER AND FILER ACCOUNTS

For an organizational broker or filer account, use the **Statement Designation** section to request separate PMS statements by port or consolidate entry summaries from each port onto a single national PMS statement. The organizational broker or filer account must participate in PMS and have a top account to edit statements.

INDICATE STATEMENT DESIGNATION FOR AN ORGANIZATIONAL BROKER OR FILER ACCOUNT

1. Locate and select the organizational broker or filer account.

2. Select the **Statements** tab.

> **NOTE**: If applicable, select the **More** tab and the **Statements** option in the drop-down menu.
>
> For accounts not participating in PMS, a not participating message displays at the top of the tab and the designation is not editable. `Broker is not participating in Statements.`

3. In the **Statement Designation** section, to the right of the **Type** field, select the **Edit** icon ✏.

> **NOTE**: The **Edit** icon does not display between the 1st and 11th workdays.
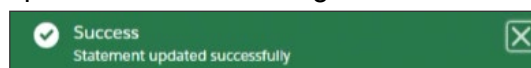
4. In the **Type** drop-down menu:

    a. Select the **Port** option to receive a separate statement for each port.
    OR

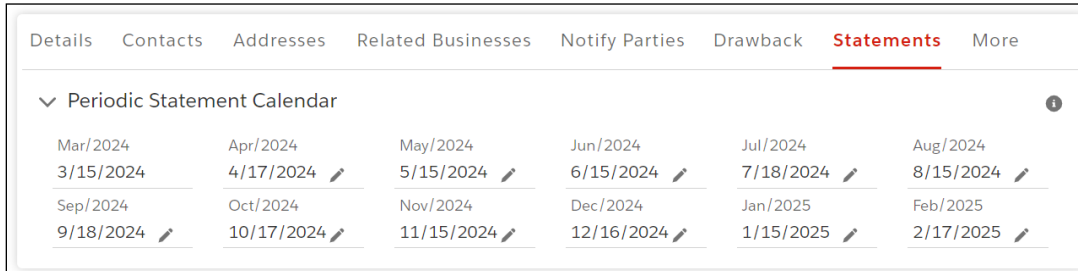   b. Select the **National** option to receive a consolidated statement to the national port.

    c. For the **National** option, in the **Port** field, type a *partial or complete port code or name* and select the national port from the drop-down menu.

5. Select the **Save** button to save the updated statement designation.

    The **Success** message displays.

EDIT THE STATEMENT CALENDAR

1. Locate and select the importer, organizational broker, or filer account.

2. Select the **Statements** tab.

Details	Contacts	Addresses	Related Businesses	Notify Parties	Drawback	**Statements**	More

∨ Periodic Statement Calendar

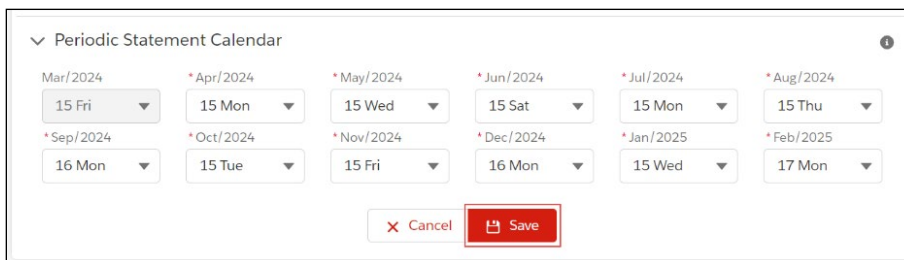| Mar/2024	Apr/2024	May/2024	Jun/2024	Jul/2024	Aug/2024
3/15/2024	4/17/2024 ✎	5/15/2024 ✎	6/15/2024 ✎	7/18/2024 ✎	8/15/2024 ✎
Sep/2024	Oct/2024	Nov/2024	Dec/2024	Jan/2025	Feb/2025
9/18/2024 ✎	10/17/2024 ✎	11/15/2024 ✎	12/16/2024 ✎	1/15/2025 ✎	2/17/2025 ✎

NOTE: If applicable, select the **More** tab and the **Statements** option in the drop-down menu.

For accounts participating in PMS, the **Periodic Statement Calendar** section expands automatically to display the statement dates for each month.

For accounts not participating in PMS, a not participating message displays at the top of the tab and no months display in the **Periodic Statement Calendar** section.

Importer is not participating in Statements.

3. In the **Periodic Statement Calendar** section, select an **Edit** icon ✎.

The **Periodic Statement Calendar** section displays in edit mode.

∨ Periodic Statement Calendar

Mar/2024	*Apr/2024	*May/2024	*Jun/2024	*Jul/2024	*Aug/2024
15 Fri ▾	15 Mon ▾	15 Wed ▾	15 Sat ▾	15 Mon ▾	15 Thu ▾
*Sep/2024	*Oct/2024	*Nov/2024	*Dec/2024	*Jan/2025	*Feb/2025
16 Mon ▾	15 Tue ▾	15 Fri ▾	16 Mon ▾	15 Wed ▾	17 Mon ▾

✕ Cancel   💾 Save

NOTE: The current month is not editable.

4. Select the month statement date drop-down menu for a specific month.

5. In the month drop-down menu, use the scroll bar if applicable and select the new date/day option for the PMS statement date.

6. If applicable, repeat steps 4 and 5 for each month.

7. Select the **Save** button to save the updated statement calendar.

The **Success** message displays.

✓ Success
Statement updated successfully ✕

*Apr/2024
15 Mon ▾

- 8 Mon
- 9 Tue
- 10 Wed
- 11 Thu
- 12 Fri
- 13 Sat
- 14 Sun
- ✓ 15 Mon