

THE CARMICHAEL C MPASS

"WHEN THE TIDES OF TRADE SHIFT, WE'RE YOUR COMPASS."

SPECIAL MEMO

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Identifying Potential CAPE-Eligible Entries: Current Options for Clients

As we move towards the Phase 1 implementation for CAPE, clients have several options already at their disposal to help identify entries that may qualify for CAPE processing.

While each method provides useful data, it is important to understand their limitations and the level of manual review required. To start, clients can utilize the HTS-level report available on the Carmichael website. This option allows users to extract relevant entry data; however, it comes with notable limitations and will require manual review.

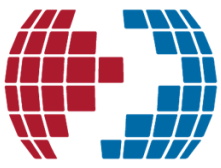
To run this report, clients can log in to their Carmichael portal account and navigate to the reports tab and then create/schedule a standard report. Here you will need to choose the HTS Level Entry Data Summary report. Once this report is chosen, fill in your customer code, choose entry date as your date type, and choose the date range you would like to generate a report for. To capture all relevant shipments, we recommend covering entry dates from 2/4/25 through 2/28/26. However, as a note, importers with larger shipment volumes should break this date range into smaller, more manageable date ranges to avoid exceeding the email report size limit. A range of two months at a time should suffice.

Another available option is to generate reports directly through the ACE Portal on the U.S. Customs and Border Protection (CBP) website. These reports are independent of Carmichael's internal systems and provide an additional source of entry data. Like the HTS report, however, ACE reports require manual filtering and detailed review to identify potentially eligible entries.

Regardless of the method used, it is important to note that none of the currently available reports offer a fully filtered, CAPE-ready dataset. Clients should expect to perform manual analysis and apply their own criteria when identifying eligible entries. Carmichael strongly recommends that clients carefully review the limitations of each reporting option before proceeding with any filing decisions.

Customers can also reach out to their CIS client representative and request that we run a report to capture your entries for you. This service does require a fee. Your client representative can provide you with the pricing structure for all our CAPE related services.

As additional tools and guidance become available, Carmichael will continue to provide updates to support a more efficient and accurate CAPE identification process.



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