



**Canadian Stewardship
Services Alliance**

Ready to Report

Steward Webinar for 2020 Packaging and Paper Product Reports

Calla Farn, VP Corporate Affairs

Natalia Chornobay & Paolo Di Bartolomeo, NSS

Mike Terry, Project Management

February 26, 2020



**Canadian Stewardship
Services Alliance**

Welcome

- New reporter webinar yesterday
- Presentations and resources available
- Poll questions





Webcast Information

- ① Main screen displays slides, videos and polls
- ② Current speaker is identified
- ③ Submit your questions
- ④ Direct links to documents and resources

The screenshot shows a webcast interface with two main panels. The left panel is titled 'Media Player' and contains a video player showing a speaker, a 'Q&A' section with a text input field and a 'Submit' button, and a 'Resource List' with links to 'Report to Stewards', 'Today's Presentation', and 'Program Plan Consultation'. The right panel is titled 'Slides' and displays a presentation slide with the Canadian Stewardship Services Alliance logo, the title 'Ready to Report', the subtitle 'Webinar for New Stewards and Reporters', and the topics 'Packaging and Paper Product Reports' and 'Calla Farn, VP Corporate Affairs' and 'Natalia Chornobay & Paolo Di Bartolomeo, NSS'. A bottom navigation bar contains icons for a presentation, video, document, question mark, Q&A, document, and user profile. Red circles with numbers 1 through 4 are overlaid on the interface: 1 is on the 'Slides' panel, 2 is on the 'Media Player' panel, 3 is on the 'Q&A' section, and 4 is on the 'Resource List' section.

Technical issues? Send a note in the Q&A box



Agenda

1. Reporting Resources
2. Materials and Data Preparation
3. Upgraded WeRecycle Portal
4. Questions & Answers



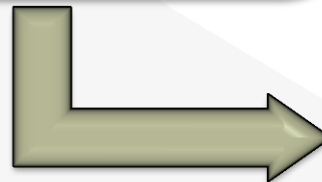
Reporting and Invoice Cycle

Annual Report by
May 31

- Contains data from previous year



Reports inform fee
setting process



Invoices issued
in January

- 2020 report is based on 2019 data;
- Informs 2021 invoices.



2020 Reporting Resources

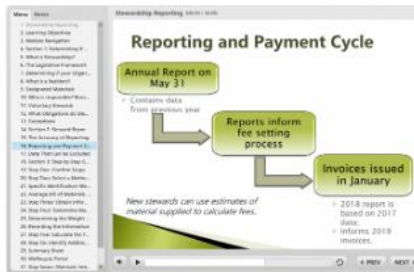
2020 Guidebook for Stewards



Materials Tool



Reporting Overview Tutorial



ABOM Tutorial



- ▶ Using the WeRecycle Portal
- ▶ Rules, Policies & Forms
- ▶ Preparing Your Report
- ▶ Ready to Report Webinars

Contact NSS: 1-888-980-9549 or stewards@cssalliance.ca



**Canadian Stewardship
Services Alliance**

Guidebook For Stewards



Helping Businesses Meet
Their Packaging & Paper
Product Recycling Obligations
in Canada

Updated January 2020

GUIDEBOOK FOR STEWARDS

The Canadian Stewardship Services Alliance:
Bringing better recycling options to consumers through
the delivery of harmonized services to industry stewards.

Part One:
Are you a steward?

Part Two:
*How to prepare your
steward report*

Part Three:
WeRecycle Material List



Using Steward Lists

- Steward Lists make it easier for retailers and other first importers to exclude suppliers' products from their reports
- If supplier not on list but resident in reporting province, do not include their material in your report
- National and program lists, change logs available



Deductions

- Stewards may deduct designated PPP from their report if:
 - Materials supplied to consumers are not managed in the residential waste stream
 - Product returns which are not resupplied
 - Packaging removed from customer's home
- **Substantiation required**
 - Completed Deduction Form
 - Copies of studies, research data and its application
 - Ensure data clearly demonstrates the % of PPP managed outside of the residential waste stream



2020 Terminology Updates

Previous Terminology	Revised Terminology	Definition
National material list	WeRecycle Material List	Harmonized list including all materials from program material lists, mapped to each program's material list.
Provincial material list	Program Material List	Program specific material list. Each program's list is different.
Reporting nationally	Multi Program Report	User sees more than one program on screen while entering data.
Reporting provincially	Single Program Report	User only sees one program on screen while entering data.



**Canadian Stewardship
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Materials Tool



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Is it packaging?



Is it paper product?

Not sure? 

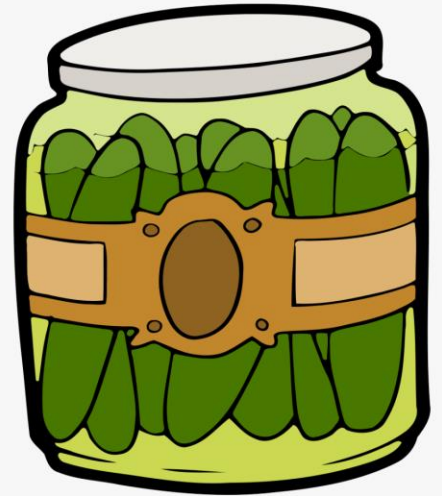
[WERECYCLE PORTAL](#) • [GUIDEBOOK FOR STEWARDS](#) • [GLOSSARY](#) • [USER AGREEMENT](#) • [CONTACT](#)



Component Threshold Rule

Can report under majority category if a packaging component:

- is less than 5% of the overall weight of all packaging components combined,
- remains attached to the packaging when the consumer discards the packaging, or
- will not remain connected to the packaging when the consumer disposes of it



See: **2.4.1 The component threshold rule** of the **Guidebook for Stewards**



Average Bill of Materials (ABOM) Method

- Gathering material and weight data
- SKUs with similar packaging - select a representative sample
- Move to weighted-average ABOM because it provides better accuracy with little additional work






ABOM Tutorial

Menu Notes




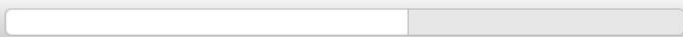


- 1. Calculating Weights Using the A...
- 2. Learning Objectives
- 3. Module Navigation
- 4. Reporting Weights
- 5. Methods for Determining Weights
- 6. When to Use the ABOM Method
- 7. Benefits of the ABOM Method
- 8. Using the ABOM Method
- 9. Identify Products with Like-Pack...
- 10. Choose a Representative Sample
- 11. Recording Sales Quantities & D...
- 12. Multiply Material Weight by Su...
- 13. Multiply the Weighted Average ...
- 14. Convert to Kilograms
- 15. Additional Resources
- 16. Optional Quiz

Calculating Weights Using the Average Bill of Materials Method (00:13 / 11:02)

Calculating Weights Using the Average Bill of Materials Method



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About the WeRecycle Portal upgrade...

- Proven and secure platform
- Extend value of significant technology investment
- Implement more modern interface, make easier to use
- Enable future enhancements

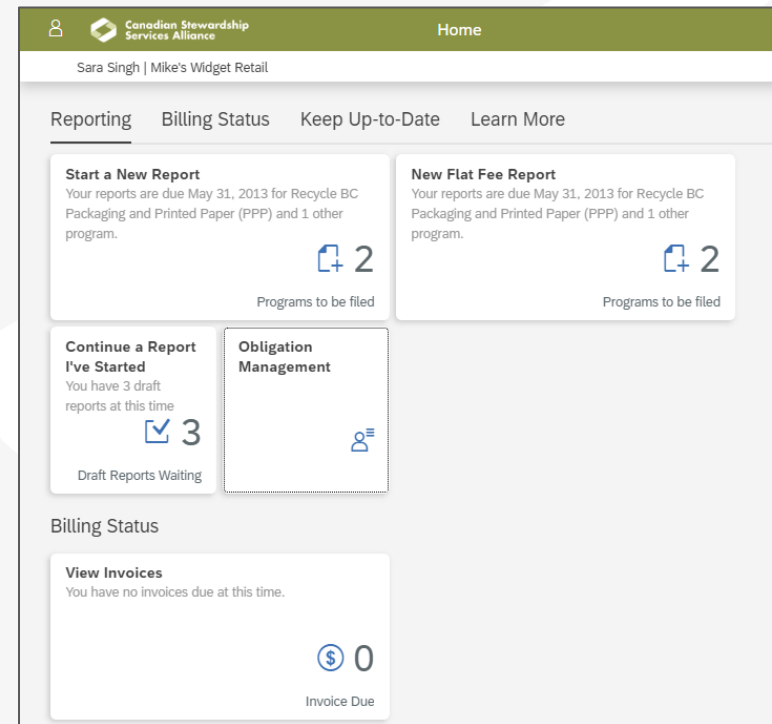
A screenshot of the WeRecycle Portal login interface. The header is green with the text "Welcome to the WeRecycle Portal!". Below this is the Canadian Stewardship Services Alliance logo. The login form includes a "User ID" field, a password field with a masked password "*****", and a "Forgot password?" link. A green "Login" button with a right arrow is positioned below the password field. At the bottom of the form, there is a link for "New to WeRecycle? Create Your WeRecycle Account >". The footer contains logos for RECYCLEBC, Multi-Material Stewardship Western, MMSM Multi-Material Stewardship Manitoba, Stewardship Ontario, and Automotive Materials Stewardship.

New password security requirements



Improved User Experience

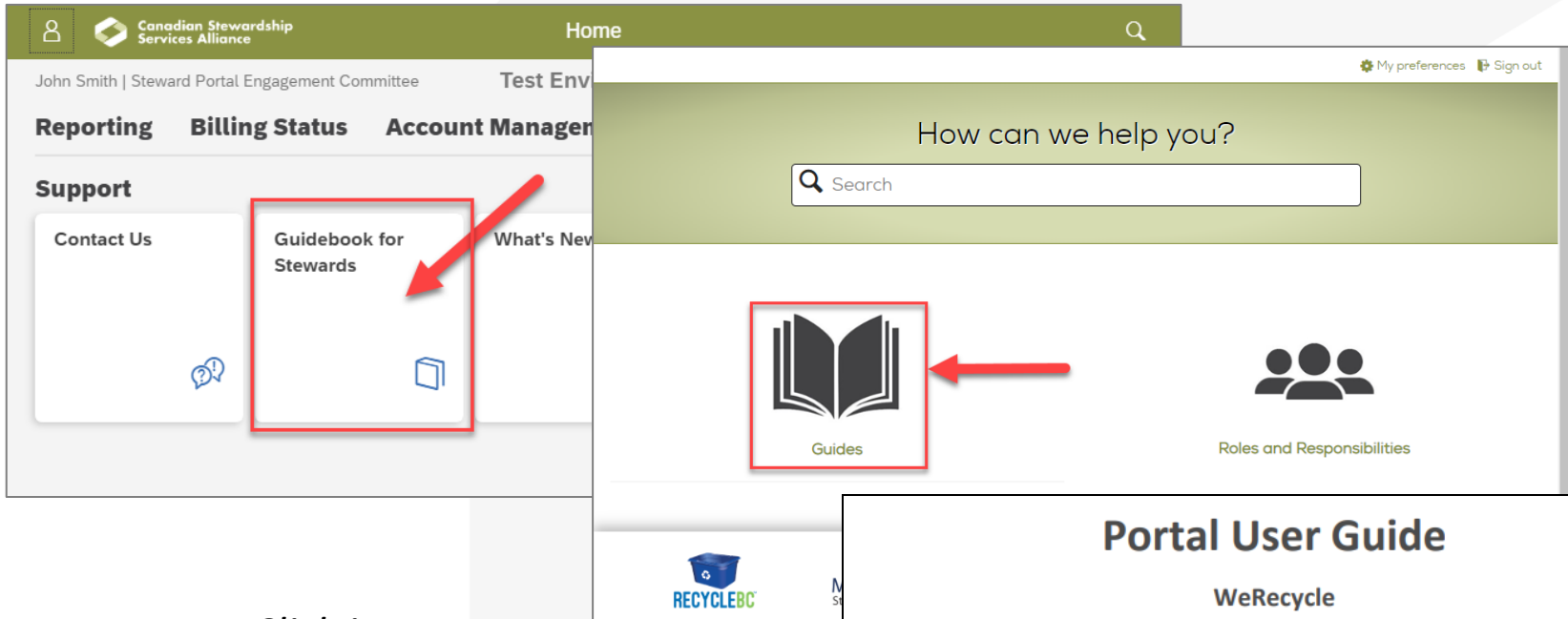
- Scrolling instead of tabbing
- Home page tiles
- Additional on screen guidance
- Fewer clicks for returning stewards to confirm obligation
- Quick access to reports in progress



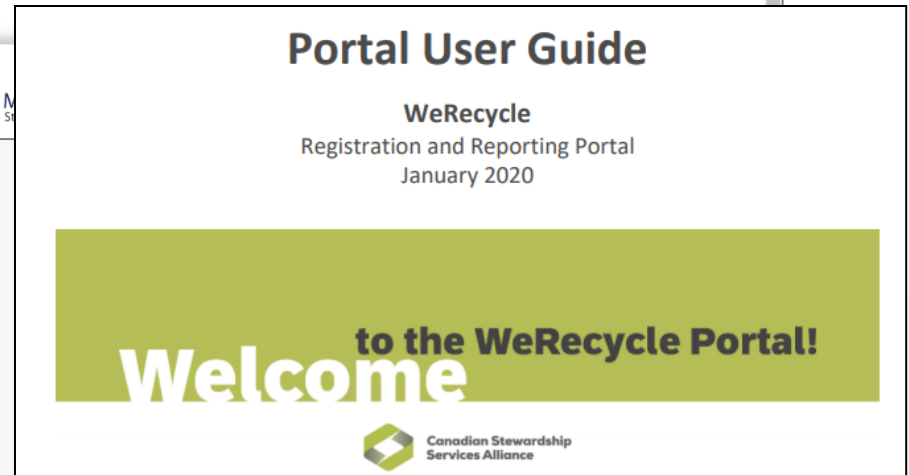


Canadian Stewardship
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Guidance and Assistance Available



*Click icon to
access
Guidebook
information*





Obligation

- Must confirm before reporting!
- Table indicates where confirmation is needed
- Last year's confirmation is presented for reference

The screenshot displays the 'Confirm your Obligation' section of the Canadian Stewardship Services Alliance portal. A red box highlights the 'Confirm your Obligation' button, with a red arrow pointing to it. The page shows the user's name, John Smith, and the role, Steward Portal Engagement Committee. The 'Test Environment' is indicated. The 'Reporting' tab is selected, showing a 'Start a New Report' button and a 'Continue a Report I've Started' button. A table titled 'Choose a Program' shows the obligation status for various programs. A modal window titled 'Questions to be Answered - Multi-Material Stewardship Manitoba 2021' is open, indicating that the user still needs to answer obligation questions for Multi-Material Stewardship Manitoba for 2021. The modal also includes a link to the 'Obligation Questions' and a 'Close' button.

John Smith | Steward Portal Engagement Committee

Test Environment

Reporting Billing Status Account Management Support

Confirm your Obligation

Start a New Report
You have 11 reports to file.

Continue a Report I've Started
You have 3 draft reports at this time

View Past Reports

1 Reports to be filed

Choose a Program

The check mark(s) in the table below shows the years your organization has indicated it is obligated to submit reports and the question marks indicate the years that are outstanding. Click on the icons to view the obligation questions and to determine your reporting requirement for the outstanding years. Please complete all obligation questions for the outstanding years.

Your Obligation Status	2020 Report (2019 data, 2021 invoice)	2019 Report (2018 data, 2020 invoice)	2018 Report (2017 data, 2019 invoice)	2017 Report (2016 data, 2018 invoice)	2016 Report (2015 data, 2017 invoice)
Recycle BC	✓	✓	✓	✓	✓
Multi-Material Stewardship Western	✓	✓	✓	✗	✗
Multi-Material Stewardship Manitoba	?	✓	✓	✗	✗
Stewardship C	✓	✓	✓	✓	✓

Questions to be Answered - Multi-Material Stewardship Manitoba 2021

You still need to answer your obligation questions for **Multi-Material Stewardship Manitoba** for 2021.

Did you make a mistake when answering the questions?
No problem, give us a call at 1-888-980-9549 and we can reset your answers for you

Close



Obligation Options

- Obligated: confirm resident and obligated
- Voluntary: confirm voluntary
- Not Obligated: indicate why not obligated
- Unsure: answer questions to determine obligation

    Canadian Stewardship
Services Alliance

Confirm your Obligation 



John Smith | Steward Portal Engagement Committee

Test Environment




Determining Your Obligation(s)

Multi-Material Stewardship Western • 2021 invoice, 2020 Report (2019 data)

Is your organization an Obligated Steward under the **Saskatchewan Multi-Material Stewardship Western** in the following period: **2021 invoice, 2020 report (2019 data)**?

Obligated Stewards will be invoiced in January **2021** based on their **2020** Annual Steward Report submitted by **May 31st, 2020** (based on **2019** data).

 [More Information](#)

☐ Yes, Resident Obligated Steward

☐ Yes, Approved Voluntary Steward

☐ Not Obligated

☐ I'm Unsure, Help Me Determine



Reporting

- Three options: Start New, Start Flat Fee (BC and SK), Continue
- Table shows where reports are needed, started, finished; choose a year, program

John Smith | Steward Portal Engagement Committee

Test Environment

Reporting Billing Status Account Management Support

Confirm your Obligation
You have 3 draft reports at this time

Start a New Report
You have 11 reports to file.

Start a New Flat Fee Report
You may be eligible to file flat fee reports.

Continue a Report I've Started
You have 3 draft reports at this time

View Past Reports

John Smith | Steward Portal Engagement Committee

Test Environment

Program

Program	2020 Report (2019 data, 2021 invoice)	2019 Report (2018 data, 2020 invoice)	2018 Report (2017 data, 2019 invoice)	2017 Report (2016 data, 2018 invoice)
Recycle BC		✓	✓	✓
Multi-Material Stewardship Western			✓	✗
Multi-Material Stewardship Manitoba	?	✓	✓	✗
Stewardship Ontario Blue Box	?	✓	✓	✓



Reporting Options

- Indicate up front if any apply to a report:
 - Report by percent
 - Program material list
 - Divisions
 - Calculators
- Streamlines experience for simple reports
- Drives presentation of screens later on

A screenshot of a web application interface for the Canadian Stewardship Services Alliance. The header bar is green and contains a user profile icon, navigation arrows, the organization's name, a dropdown menu labeled 'St...', and search and filter icons. Below the header, the user's name 'Michael Terry | Widget Retail Inc.' is displayed. The main content area is titled '1 Program' and contains a series of questions and options for reporting. Question 5 asks 'Do any of the following apply to your report:' with a list of options: 'Report by Percentage', 'Report using Provincial Material List', 'Report with Divisions', and 'Report with Product Calculators'. Below this list are 'Yes' and 'No' radio buttons. Question 6 is 'Report by Percentage' with two buttons: 'Report by Percentage' (selected) and 'Report by Kg'. Question 7 is 'Choose a Material List' with two buttons: 'National List' (selected) and 'Provincial List'. Question 8 is 'Report Using Divisions' with two buttons: 'Report Without Divisions' (selected) and 'Report With Multiple Divisions'. Question 9 is 'Report Using Product Calculators' with 'Yes' and 'No' radio buttons. At the bottom of the form is a green 'Save Preferences' button.



Enter Reporting Data





- Hover to highlight material row; selected cell is orange
- Click and drag to resize columns (like Excel)
- Prior year quantities hidden by default
- When data complete, must be submitted by Primary contact


Material Quantities: First Division					
Material		Total All programs	MMSM	BC	SO
▼ Printed Paper					
Newspaper-CNA/OCNA Members	KG				
Other Newsprint-Non-CNA/OCNA Members	KG				
Newspapers	KG		1000	1000	
Newsprint (inserts and circulars)	KG				
Magazines	KG				1000
Catalogues	KG		1000	1000	1000
Directories	KG		1000	1000	1000




Methodology

- Explain how you calculated your figures
- Detail is appreciated!


 Canadian Stewardship
Services Alliance


Steward Reporting 





John Smith | Steward Portal Engagement Committee

Test Environment

 Material
Quantities

 Methodology

 Brands &
Affiliates



Tell us About Your Methodology

2020 Report (2019 data, 2021 invoice)

Copy From Previous Report

Please take a few moments to complete the following sections as the information is very helpful when conducting report validations.

1. Preparation of Data

Please clearly describe the process you have used to calculate the data you reported.
How did you calculate your obligated sales? *(Did you use sold-to sales information, bill-to sales information, population percentage method, etc.).*
How did you calculate your weights? *(ABOM, supplemental calculator, vendor provided the information, used a scale to weigh packaging components, etc.)*

Conducted packaging audit for each SKU...



Submitting Report

- Make sure you are primary, all sections complete, & accept terms and conditions

Steward Reporting

John Smith | Steward Portal Engagement Committee

Test Environment

Material Quantities

Methodology

Brands & Affiliates

Report Submission

2020 Report (2019 data, 2021 invoice)

Your Organization's Annual Steward Report

Company: **Steward Portal Engagement Committee**

Name: **John Smith**

Steward No: **0001008837**

Title: **Analyst**

Canadian Stewardship Services Alliance 2020 Report (2019 data, 2021 invoice)

82,300 kg

2. Terms and Conditions

[Download Terms and conditions](#)

Terms and Conditions

By clicking on the button below, you confirm the following:

- You are either the Primary Contact for your company or are the authorized agent for the Steward that you are reporting on behalf of.
- You have read the program rules and/or have uploaded your signed membership agreement.
- The information and data contained in your report and any uploaded documents are complete and accurate.
- Where applicable, your deduction declaration form will be provided by the report submission deadline and you will provide documentation to support your deductions upon request.
- You understand and agree that your company must retain supporting documentation for five years from submission date and that your report may be subject to audit.

☒ I agree and confirm the above

Submit Report



Past Reports

- View pdfs of reports from any prior year
- Search, filter, download one or multiple pdfs

John Smith | Steward Portal Engagement Committee

Test Environment

Reporting Billing Status Account Management Support

Confirm your Obligation

Start a New Report

You have 12 reports to file.

Continue a Report I've Started

You have 3 draft reports at this time

Draft Reports Waiting

View Past Reports

Account Info

John Smith | Steward Portal Engagement Committee

Test Environment

Profile Programs Past Reports Invoices Shared Files Manage Contacts

Past Reports

Use the drop down menu to filter or search reports or select report(s) from the All Reports list below. Please note that Report Period reflects program reporting requirement (annual or quarterly).

Program: Report Period: Sales Order Report Status: X

All Reports (17)

Download All Reports

	Program	Invoice Period	Report Period	Data Period	Sales Order	Report Status	Report
<input type="checkbox"/>	Automotive Materials Stewardship	2019	2019	2019	0000057041	Q1 In Progress	View PDF
<input type="checkbox"/>	Canadian Stewardship Services Alliance	2021	2020	2019	0040004188	In Progress	View PDF
<input type="checkbox"/>	Canadian Stewardship Services Alliance	2020	2019	2018	0040004187	In Progress	View PDF
<input type="checkbox"/>	Canadian Stewardship Services Alliance	2019	2018	2017	0040004186	Report Submitted	View PDF
<input type="checkbox"/>	Multi-Material Stewardship Manitoba	2020	2019	2018	0040004176	Report Submitted	View PDF
<input type="checkbox"/>	Canadian Stewardship Services Alliance	2020	2019	2018	0040004154	Report Submitted	View PDF
<input type="checkbox"/>	Canadian Stewardship Services Alliance	2019	2018	2017	0040004151	Report Submitted	View PDF



Report Validation

- All reports are reviewed for accuracy – vital for accurate invoicing and fee setting
- Validation of submitted report
- Common issues include:
 - Updates to brands and methodology
 - Explanation of material tonnage variances $\pm 20\%$
 - Deduction review



**Canadian Stewardship
Services Alliance**

Q&A

Reporting deadline is May 31
Webinar presentation available online



**Canadian Stewardship
Services Alliance**

Thank You!

www.cssalliance.ca

1-888-980-9549

stewards@cssalliance.ca