



**Canadian Stewardship  
Services Alliance**

# **Ready to Report**

## **Webinar for New Steward Reporters**

### **2021 Packaging and Paper Product Reports**

*Natalia Chornobay*

*Paolo Di Bartolomeo*

*David West*

National Steward Services

February 24, 2021





**Canadian Stewardship  
Services Alliance**

# Welcome

- Thank you!
- Reporting basics for packaging and paper programs
- Resources available to stewards
- Poll questions



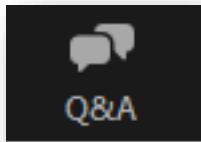




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# Webcast Information

- ① Main screen displays slides and polls
- ② Current speaker will be on video
- ③ Submit your questions using the Q&A button in toggle bar



The screenshot shows a webinar interface. At the top left is the Canadian Stewardship Services Alliance logo (callout 1). The main title is 'Ready to Report' (callout 2), followed by 'Webinar for New Steward Reporters' and '2021 Packaging and Paper Product Reports'. Below this are the names 'Natalia Chornobay', 'Paolo Di Bartolomeo', and 'David West', followed by 'National Steward Services' and the date 'February 24, 2021'. On the right side, there is a video feed of a woman (callout 2). At the bottom, there is a toggle bar with a 'Q&A' button (callout 3) and a 'Leave' button.

**Technical issues? Send a note using  
the Q&A button**





# Agenda

1. Reporting Overview
2. Resources Available
3. Onboarding
4. Using the WeRecycle Portal
5. Questions & Answers





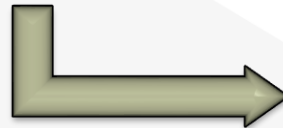
# Reporting and Invoice Cycle

Annual Report  
Filed by May 31

- Contains data from previous year



Reports inform fee  
setting process



Invoices issued in  
January

- 2021 report is based on 2020 data;
- Informs 2022 invoices.





# Reporting Overview

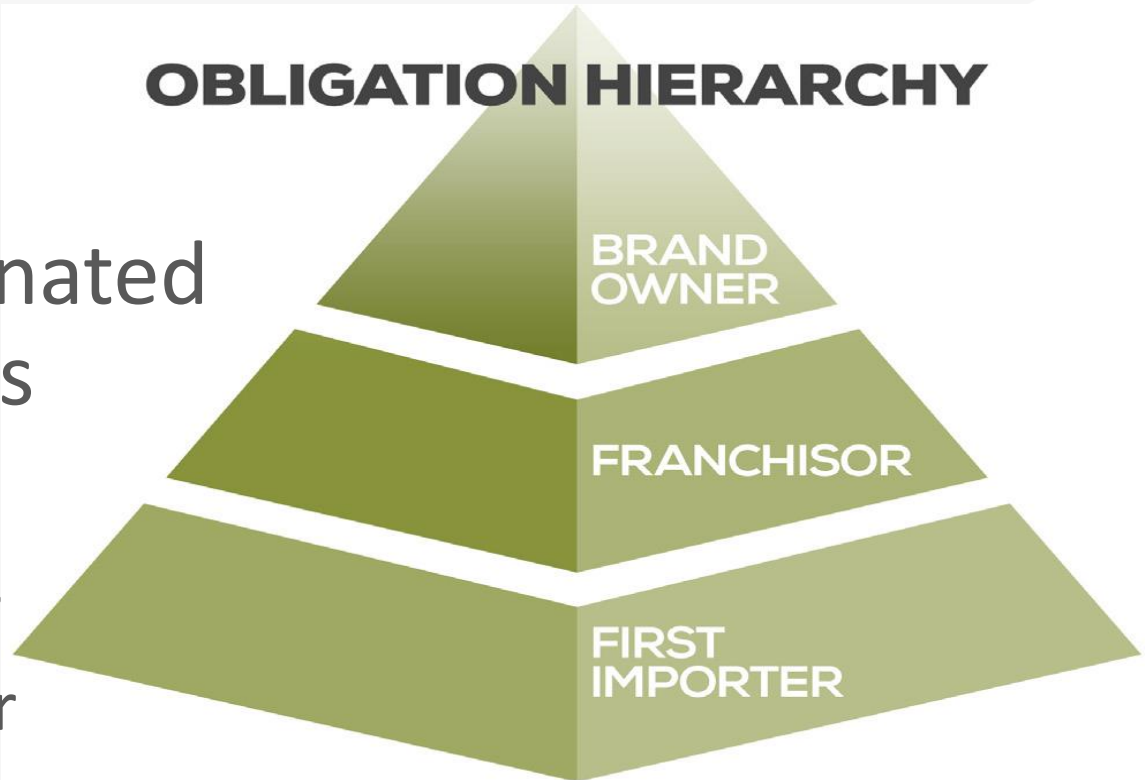
- Determining and understanding your obligation
- Exemptions from reporting
- Voluntary Stewards
- Reporting Resources





# PPP Reporting Obligation

- ✓ Resident
- ✓ Supply designated PPP materials
- ✓ Hierarchy
  - Brand Owner
  - First Importer
  - Franchisor







# Understanding Your Obligation

- Determining which organization reports
  - Program specific exemptions
  - Voluntary Stewards







# Program Exemptions

	Recycle BC	MMSW	MMSM	Stewardship Ontario
<b>Implementation &amp; Industry Share of Obligation</b>	2014 100%	2016 75%	2010 80%	2004 50%
<b>Gross Annual Revenue Exemption</b>	<\$1 Million	<\$2 Million	<\$750,000	<\$2 Million
<b>Tonnage Exemption</b>	<1,000kg	< 1,000kg	No exemption	<15,000 kg
<b>Other Exemptions</b>	Single point of retail (only applicable to retailers)	Single point of retail (only applicable to retailers)	No exemption	No exemption

*Revenue-based thresholds are calculated on the steward, its affiliates, and franchisees combined gross revenue from the combined sale of all products and services in the province during a calendar year.*





# Voluntary Stewards

- Voluntary stewards have assumed responsibility for their PPP in jurisdictions where they do not have residency
  - Policy available
  - Exemption thresholds related to revenue and kilograms do not apply
- Steward Lists
  - Identify resident suppliers and voluntary stewards
  - Avoid double reporting of material





# 2021 Reporting Resources

- CSSA website provides tools and information that help stewards collect and accurately report packaging and paper data
- NSS welcomes feedback and is ready to assist with reporting questions:  
[stewards@cssalliance.ca](mailto:stewards@cssalliance.ca) or 1-888-980-9549

The screenshot shows the CSSA website's '2021 Reporting Resources' page. At the top is the CSSA logo and navigation links: ABOUT, PROGRAMS, INFORMATION SESSIONS, REPORTING RESOURCES, NEWS, and CAREERS. A search bar and 'Contact Us' link are also present. The main content area features four resource cards: '2021 Guidebook for Stewards' (Helping Businesses Meet Their Packaging & Paper Product Recycling Obligations in Canada, Updated January 2021), 'Materials Tool' (Interactive tool to determine if a product is packaging or paper), 'Reporting Overview Tutorial' (Flowchart of the reporting and payment cycle), and 'ABOM Tutorial' (Benefits of the ABOM Method). Below these cards is a list of links: 'Using the WeRecycle Portal', 'Rules, Policies & Forms', 'Preparing Your Report', and 'Ready to Report Webinars'.

[cssalliance.ca/2021reporting/](https://cssalliance.ca/2021reporting/)





**Canadian Stewardship  
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# 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.

The definitive resource for  
steward information and our  
primary reference document

### ***Part One:***

*Are you a steward?*

### ***Part Two:***

*How to prepare your  
steward report*

### ***Part Three:***

*WeRecycle Material List*





# Reporting Overview Tutorial

This online learning tool summarizes the key elements of stewardship reporting in less than 20 minutes. It's a great place to start for new stewards and a useful review for more experienced reporters.

Menu

Notes

1. Stewardship Reporting
2. Learning Objectives
3. Module Navigation
4. Section 1: Determining If You...
5. What is Stewardship?
6. The Legislative Framework
7. Determining if your Organiza...
8. What Is a Resident?
9. Designated Materials
10. Who is responsible? Brand O...
11. Voluntary Stewards
12. What Obligations do Stewar...
13. Exemptions
14. Section 2: Steward Reportin...
15. The Accuracy of Reporting
16. Reporting and Payment Cycle
17. Data That Can be Excluded
18. Section 3: Step-by-Step Guid...
19. Step One: Confirm Scope
20. Step Two: Select a Methodol...
21. Specific Identification Method
22. Average Bill of Materials Me...
23. Step Three: Obtain Informat...
24. Step Four: Determine Materi...
25. Determining the Weight of ...
26. Recording the Information
27. Step Five: Calculate the Tota...
28. Step Six: Identify Additional ...

Stewardship Reporting (01:09 / 18:34)

## Learning Objectives

- Preparing and filing annual steward reports
- PPP = Packaging and Paper Product
- Overview of reporting concepts and process
- Resources:
  - Guidebook
  - National Steward Services

The cover of the 'GUIDEBOOK FOR STEWARDS' by The Canadian Stewardship Services Alliance. It features a green and white design with a circular diagram showing the reporting process.

A small speaker icon indicating audio content.

A play button icon for video or audio playback.

A horizontal progress bar showing the current position in the tutorial.

A circular arrow icon for refreshing the content.

A button labeled 'PREV' with a left-pointing arrow.

A button labeled 'NEXT' with a right-pointing arrow.





# About Onboarding

- How CSSA introduces new companies to reporting and determines their obligations
- Fairness principle
  - Ensures stewards pay fees in all periods they supply obligated PPP
  - Penalty and Interest Policy
- Cost effective program operation
- Estimates or data extrapolation may be required





# Onboarding Example

*New Steward that began operations on July 1, 2020*

Invoice	Report	Data	Due
2020	2019	01Jul-Dec 2020 * as a proxy for 2018 data	Register: Aug 29, 2020 Report: Oct 28, 2020
2021	2020	Jul-Dec 2020 Extrapolated (12 months) * as a proxy for 2019 data	Report: Oct 28, 2020
2022	2021	Jul-Dec 2020 Extrapolated (12 months) * as a proxy for 2020 data	May 31, 2021
2023	2022	2021	May 31, 2022





# Accurate Reporting

**Reports must be accurate to ensure fair material rates**

- When considering scope, remember to only include packaging and paper:
  - Supplied to consumers in the applicable province;
  - Associated with brands for which you are the brand owner, the first importer, or the franchisor; and
  - Only include designated PPP







# Materials Overview

- Report only designated PPP supplied to consumers
- Exclusions: IC&I, Transportation/Distribution, Durable
- Deductions: form required
- PPP material categories and sub-categories:
  - Paper Products
  - Packaging: Paper, Plastic, Steel, Aluminum, Glass
- Components

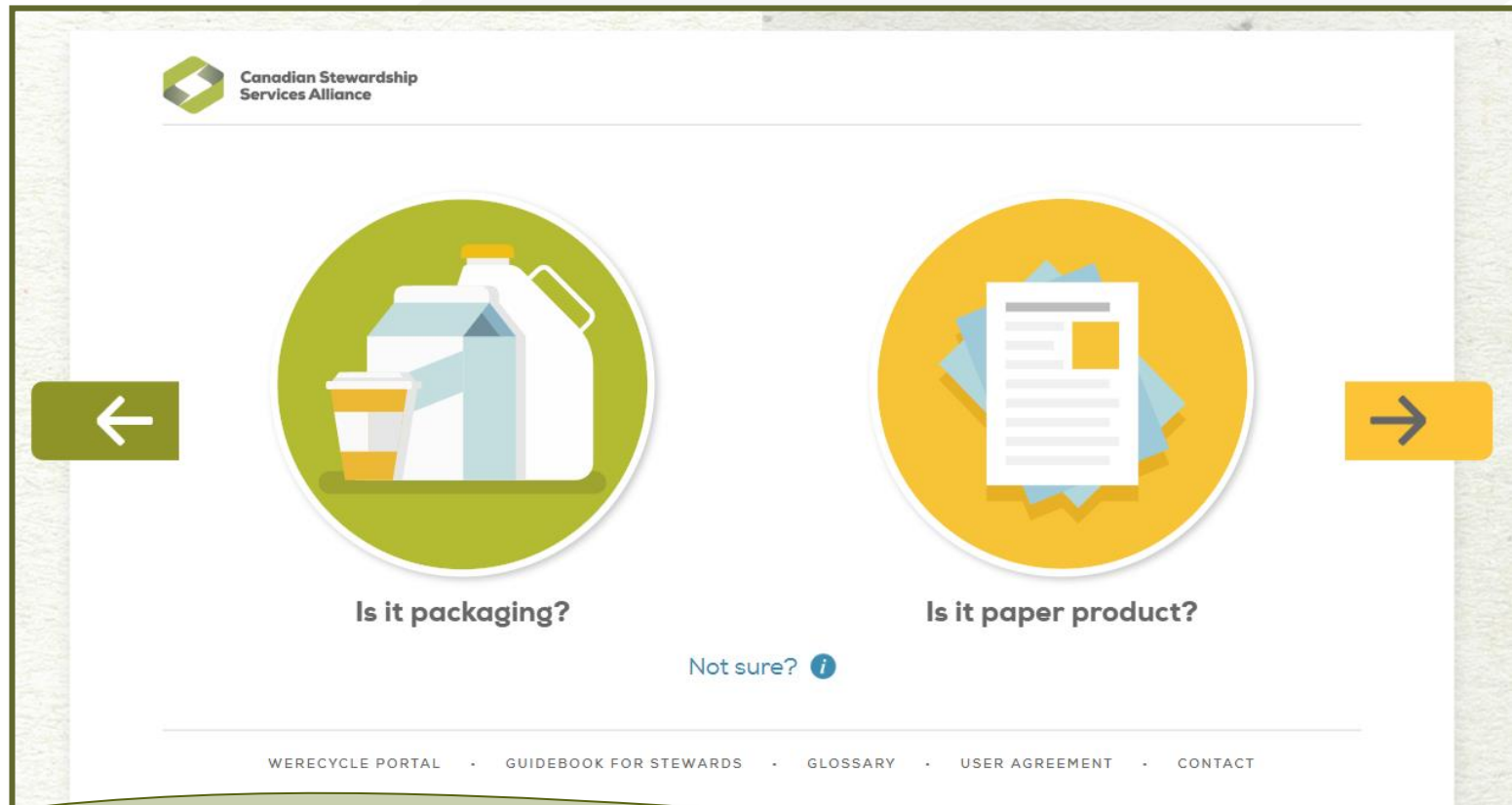






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# Materials Tool



This interactive tool helps stewards correctly identify the designated materials supplied to consumers and supports more accurate reporting.





# Data Preparation

- Calculate total weights for each material category
- Set up spreadsheet(s)
- Obtain sales data
- Workbook xls file

Per Product					Total				
Product	Other Printed Paper (kg)	Plastic – PET (kg)	Glass – Clear (kg)	Steel – Cans (kg)	SALES QUANTITY	Other Printed Paper (kg)	Plastic – PET (kg)	Glass – Clear (kg)	Steel – Cans (kg)
Product A	--	0.01	0.2	---	1,000	--	10.0	200.0	--
Product B	0.03	0.05	--	0.1	5,000	150.0	250.0	--	500.0
					<b>TOTAL</b>	<b>150.0</b>	<b>260.0</b>	<b>200.0</b>	<b>500.0</b>





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# WeRecycle Portal

- Portal login page
- Create new account
- Reset password

*Use the login page to access your account, where you can manage your contact information, confirm obligation, submit reports, view past reports and invoices, and more.*



The screenshot shows the WeRecycle Portal login interface. At the top, a green banner reads "Welcome to the WeRecycle Portal!". Below this is the Canadian Stewardship Services Alliance logo. The login form consists of two input fields: "User ID" and "Password". The "Password" field has a toggle icon (an eye) to the right. Below the password field is a link that says "Did you forget your password?". A green "Login" button is positioned below the links. At the bottom of the form, there is a link that says "New to the WeRecycle Portal? Create an Account". The footer of the page features logos for four organizations: RECYCLEBC, Multi-Material Stewardship Western, MMSM Multi-Material Stewardship Manitoba, and Automotive Materials Stewardship.

[werecycle.cssalliance.ca/irj/portal](http://werecycle.cssalliance.ca/irj/portal)







# Portal Overview

 Canadian Stewardship  
Services Alliance

Home


Contact us

**Reporting** **Billing Status** **Account Management** **Support**

**Confirm your Obligation**

**Start a New Report**


Obligation must be confirmed before you can start reporting.

 0

Reports to be filed


**Start a New Flat Fee Report**

You may be eligible to file flat fee reports.


 0

**Continue a Report I've Started**

You have no draft reports at this time

 0


Draft Report Waiting

**View Past Reports**

**Billing Status**


**View Invoices**

You have no invoices due at this time.

 0


Invoice Due

**Account Management**


**Register for Another Program**

**View/Edit Account**

We have 1 Contact for your Company. Any changes?

 1

Contact

**Steward Search**





# Portal Guidance and Assistance

**1**

How can we help you?

Home > Reporting > Stewards

## Guidebook and Reporting Resources

Last updated: Dec 10, 2020

The resources below help stewards determine the materials to include in their report and how to report them.


The **Guidebook** is a definitive source for steward information.

The **Reporting Hub** brings together FAQs, sector-specific reporting information and lists of common products and how to report them. You can browse the Hub or use the search bar above for help with specific queries.

The **Portal User Guide** provides details about navigating the WeRecycle Portal and using its modern interface to submit your data and complete administrative tasks.

- ii Guidebook for Stewards (Packaging and Paper Product)
  - 2021 Updates to the Guidebook
  - Part One: Are you a steward?
  - Part Two: How to prepare your steward report
  - Part Three: WeRecycle Material List
- ii Reporting Hub
  - Product Information
  - Sector Tips
  - FAQ

**2**

 Click icon to access Guidebook information

**3**

Chat with us!

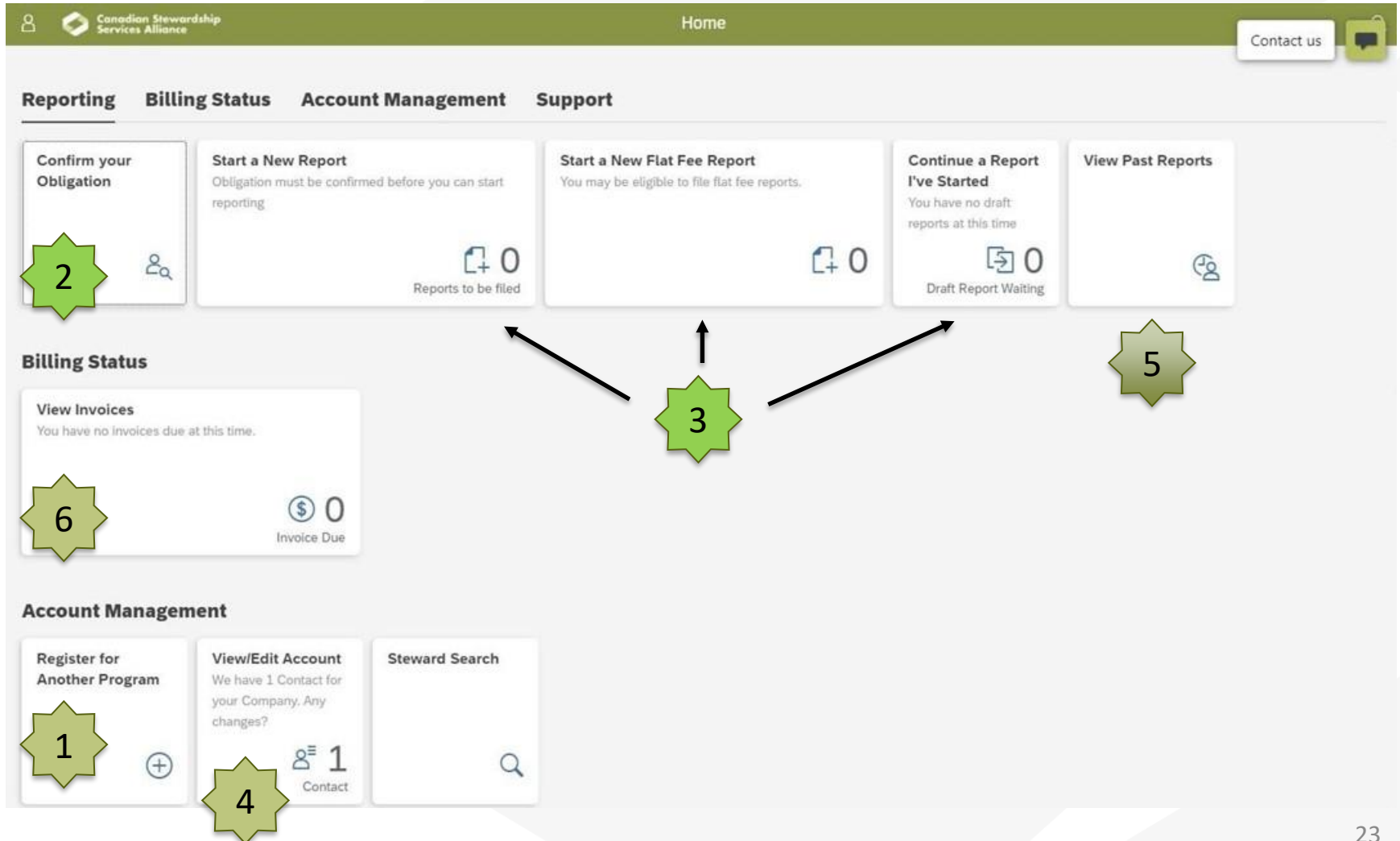
Hello, and thank you for using the WeRecycle Portal's live chat service. How can I help you today?

Type your message...





# Portal Overview







# Obligation Update

- Must confirm before reporting!
- Table indicates where confirmation is needed

Confirm your Obligation

Contact us

### Choose a Program

Which type of program do you wish to answer obligation questions for at this time?

Packaging and Printed Paper (PPP)

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	2021 Report (2020 data, 2022 invoice)	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)	2015 Report (2014 data, 2016 invoice)	2014 Report (2013 data, 2015 invoice)
Multi-Material Stewardship Western	?	?	?	?	?	?	?	?
Multi-Material Stewardship Manitoba	?	?	?	?	?	?	?	?
Stewardship Ontario Blue Box	?	?	?	?	?	?	?	?

Select a year:

2021 Report (2020 data, 2022 invoice)

Select the program you wish to answer obligation questions for.

☐ Multi-Material Stewardship Western

☐ Multi-Material Stewardship Manitoba

☐ Stewardship Ontario Blue Box



Continue





# Confirm Your Obligation


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



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Confirm your Obligation ▾





Multi-Material  
Stewardship Western

Determining Your Obligation(s)

**Multi-Material Stewardship Western • 2022 invoice, 2021 Report (2020 data)**

Is your organization an Obligated Steward under the **Saskatchewan Multi-Material Stewardship Western** in the following period: **2022 invoice, 2021 report (2020 data)**?

Obligated Stewards will be invoiced in January **2022** based on their **2021** Annual Steward Report submitted by **May 31st, 2021** (based on **2020** 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, SK & MB), Continue

Canadian Stewardship Services Alliance Home Contact us

**Reporting** Billing Status Account Management Support Admin

**Confirm your Obligation**

**Start a New Report**  
Obligation must be confirmed before you can start reporting  
0 Reports to be filed

**Start a New Flat Fee Report**  
You may be eligible to file flat fee reports.  
0

**Continue a Report I've Started**  
You have no draft reports at this time  
0 Draft Report Waiting

**View Past Reports**





# Detailed Reporting

- Table shows where reports are needed, started, finished; choose a year, program

Steward Reporting

Program

2. Hover over the icons in the table below to determine report status or click for details. Please complete all outstanding reports.

Program	2021 Report (2020 data, 2022 invoice)	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	!	!	!	!	✓
Stewardship Ontario Blue Box	!	✓	✓	✓	✓

Select which year you would like to report for. Note that you will only be able to select years where one or more programs are available for reporting.  
A program is available for reporting in a year where:

- You have confirmed your obligation as **obligated** or **voluntary**
- You have not confirmed **not obligated**
- You do not already have a report **in progress**

2021 Report (2020 data, 2022 invoice)

3. Which program would you like to file a report for?

Select the program below

☐ Recycle BC

☐ Stewardship Ontario Blue Box

☐ All of the above

Continue





# Reporting Options

- Indicate if any apply to a report:

- Report by percent
- Program material list
- Divisions
- Calculators

- Drives presentation of screens later on

4. For your selected programs, are you submitting one multi program

**Multi Program Report:** Select multiple programs to include them all in one report, using

**Single Program Report:** Select one program to report at this time. You will be able to use

[More Information](#)

☒ Multi Program Report ☐ Single Program Report

5. Do any of the following apply to your report:

Report by Percentage [More Information](#)

Report using Program Material List [More Information](#)

Report with Divisions [More Information](#)

Report with Product Calculators [More Information](#)

☐ Yes ☐ No





# Enter Reporting Data

Canadian Stewardship Services Alliance

Steward Reporting

Contact us

Product Calculators Material Quantities Methodology Brands & Affiliates

Material Quantities Total weight: 20,425,500 kg

**2021 Report (2020 data, 2022 invoice)**

Choose a Division

Division : Steward Testing Inc 20,425,500 kg

Material Quantities: Steward Testing Inc

Material		Total All programs	BC	MMSW	MMSM	SO
▼ Printed Paper		20,425,500	2,180,000	850,000	905,500	16,490,000
Newspaper-CNA/OCNA Members	Kg					
Other Newsprint-Non-CNA/OCNA Members	Kg	15,675,000				15,675,000
Newspapers	Kg		0	0	0	
Newsprint (inserts and circulars)	Kg	3,480,000	1,900,000	775,000	805,000	
Magazines	Kg					
Catalogues	Kg					
Directories	Kg					
Other Printed Materials	Kg	1,270,500	280,000	75,000	100,500	815,000
Purchased Posters, Calendars, Greeting Cards and Envelopes	Kg					

Save Continue

- Use the cells to enter your quantities for the applicable materials.
- Columns for each program quantities. When reporting for multiple programs, the total kg for All - Programs will be calculated.
- The total kg for all materials and programs appears in the top right.





## Data Entry Tips

- Round to the nearest unit of measure, page does not accept decimals.
- Scroll down to view entire list of material categories.
- Bolded text identifies material headers, which total the material categories below.
  - As a result, the totals for material headers sum to the top.
  - Click the chevron next to a material header to collapse or expand it.
- Once data has been entered **remember to hit the save button which will be on bottom right of your screen** and then continue to methodology.
- You will be able to come back to this report at any time by clicking the *'Continue a Report I have started'* tile on the home page.





# Methodology

- Explain how you calculated your figures
- Detail is appreciated

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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 Completed Report

- Make sure logged in as Primary, all sections complete, accept terms and conditions




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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**





# 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
- Deduction review
- Explanation of material tonnage variances  $\pm 20\%$

The screenshot displays the 'Steward Reporting' web application interface. The top navigation bar includes the Canadian Stewardship Services Alliance logo and the text 'Steward Reporting'. Below the navigation bar, a progress bar shows the current step: 'Methodology' (highlighted in green), with other steps like 'Calculator Selection', 'Product Calculators', 'Material Quantities', 'Brands & Affiliates', and 'Report Submission' shown as inactive. The main content area is titled '3. Deductions' and contains the following instructions:

- If you do NOT claim any deductions in your report, please write **NONE** in the box below (A)
- If you claim any deductions in your report:
  - Please write **YES** in the box below (A) ;
  - Click the check box (B) ;
  - Download the deduction declaration form (C);
  - and upload your completed form (D)

Below these instructions, there is a large text input box labeled (A). To the right of the input box, there is a checkbox labeled (B). Below the checkbox, there is a text input box labeled (C) with a 'Download template' button next to it. Below the text input box, there is a text input box labeled (D) with an 'Upload' button and a 'Browse...' button next to it. At the bottom of the form, there is a section titled '4. Increases and Decreases' with the following text: 'Have you reported 20% more or less of any material? If so, please provide an explanation. If you are reporting different materials from your last report, please explain why.' Below this text is a large text input box.





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# Q&A

Reporting deadline is May 31  
Webinar presentation available online





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# **Thank You!**

**[www.cssalliance.ca](http://www.cssalliance.ca)**

**1-888-980-9549**

**[stewards@cssalliance.ca](mailto:stewards@cssalliance.ca)**