



**Canadian Stewardship
Services Alliance**

Ready to Report

Webinar for New Steward Reporters

2020 Packaging and Paper Product Reports

Calla Farn, VP Corporate Affairs

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February 25, 2020



**Canadian Stewardship
Services Alliance**

Welcome

- Packaging and Paper Product (PPP) reporting basics
- Resources available to stewards
- Poll questions



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



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 displays a webcast interface with four numbered callouts:

- 1**: Points to the main slide area on the right, which shows the Canadian Stewardship Services Alliance logo and the text: "Ready to Report", "Webinar for New Stewards and Reporters", "Packaging and Paper Product Reports", "Calla Farn, VP Corporate Affairs", and "Natalia Chornobay & Paolo Di Bartolomeo, NSS".
- 2**: Points to the Media Player window on the left, which displays a video of Calla Farn, Vice-President, Corporate Affairs.
- 3**: Points to the Q&A box on the left, which contains a text input field labeled "Please enter a question" and a "Submit" button.
- 4**: Points to the Resource List on the left, which includes links for "Report to Stewards", "Today's Presentation", and "Program Plan Consultation".

At the bottom of the interface is a navigation bar with icons for chat, video, document, help, Q&A, and user profile.

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



Agenda

1. Steward Obligation and Onboarding
2. Reporting Resources
3. Data Preparation
4. WeRecycle Portal
5. Report Validation
6. Questions & Answers



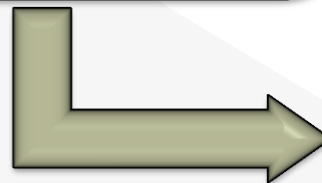
Reporting and Invoice Cycle

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.



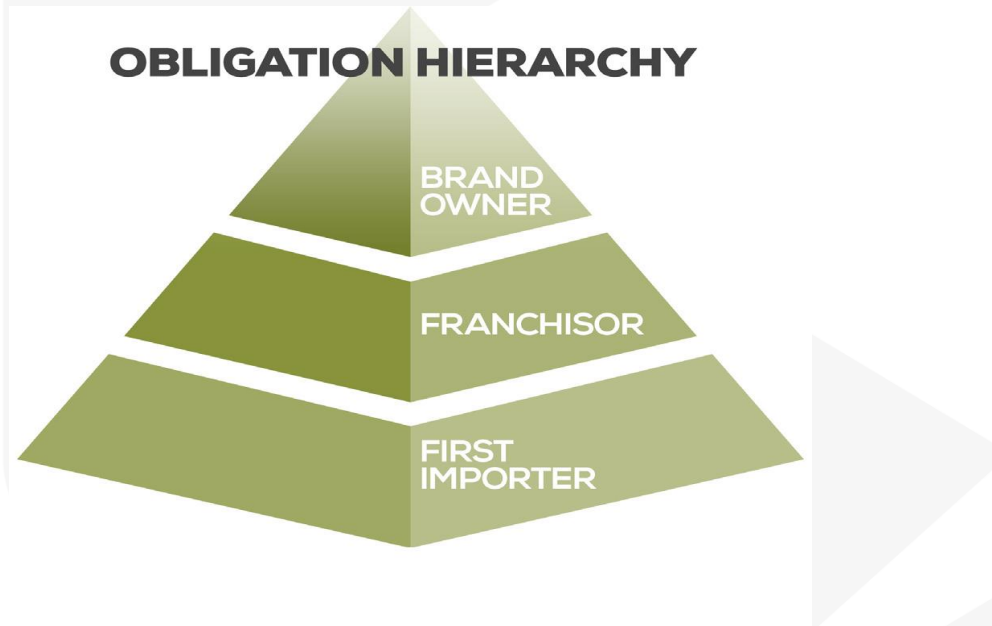
Overview

- Determining and understanding your obligation
- Exemptions from reporting
- Voluntary Stewards
- Onboarding
- Preparing Your Report – 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
- Onboarding as a newly registered Steward
 - Stewards have a financial responsibility to fund PPP programs
 - Invoice for each year that they supply PPP into the market



Program Exemptions

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



Voluntary Stewards

- Voluntary stewards are organizations that 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



Onboarding Principles

- Fairness
 - Ensures stewards pay fees in all periods they supply obligated PPP
 - Subject to Penalty and Interest Policy
- Cost effective program operation
- Estimates or data extrapolation may be required



Onboarding Example

New Steward that began operations on Oct 17, 2018

	Invoice	Report	Data	Due
1 st	2018	2017	Oct-Dec 2018 * as a proxy for 2016 data	Register: Dec 16, 2018 Report: Feb 14, 2019
2 nd	2019	2018	Oct-Dec 2018 Extrapolated (12 months) * as a proxy for 2017 data	Feb 14, 2019
3 rd	2020	2019	Oct-Dec 2018 Extrapolated (12 months)* as a proxy for 2018 data	May 31, 2019
4 th	2021	2020	2019	May 31, 2020



2020 Reporting Resources

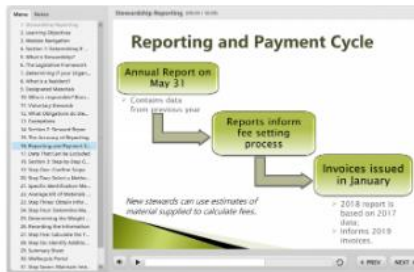
2020 Guidebook for Stewards



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



Part One:
Are you a steward?

Part Two:
*How to prepare your
steward report*

Part Three:
WeRecycle Material List




Reporting Overview Tutorial

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



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 ...

PREV NEXT



Accurate Reporting

- Reports must be accurate to ensure fair material rates
- When considering scope, remember to only include PPP:
 - 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





Canadian Stewardship
Services Alliance

Materials Tool



Canadian Stewardship
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Is it packaging?



Is it paper product?

Not sure? 



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
					TOTAL	150.0	260.0	200.0	500.0



Your Methodology

- Outline preparation of data
- Changes to process or method
- Increases and decreases?
- Maintain records





WeRecycle Portal

- 2020 upgrade!
- User ID and password
- Manage contacts
- Register for programs
- Membership Agreements
- Confirm obligation
- Submit reports
- Review reports/invoices

The screenshot shows the WeRecycle Portal login interface. At the top, a green banner contains the text "Welcome to the WeRecycle Portal!". Below this is the Canadian Stewardship Services Alliance logo and name. The login form includes a "User ID" input field, a "Password" input field with a toggle eye icon, and a "Did you forget your password?" link. A green "Login" button is positioned below the password field. At the bottom of the form, there is a link for "New to the WeRecycle Portal? Create an Account". The footer of the page features logos for RECYCLEBC, Multi-Material Stewardship Western, MMSM Multi-Material Stewardship Manitoba, Stewardship Ontario, and Automotive Materials Stewardship.



Annual Portal Actions

1. Make sure contacts are up to date
2. Confirm obligation
3. Submit reports
4. Invoices
\$5000 or less payable via Portal

The screenshot shows a user dashboard for John Smith, a member of the Steward Portal Engagement Committee. The dashboard is organized into several sections:

- Reporting**:
 - Confirm your Obligation**: A card with a magnifying glass icon.
 - Start a New Report**: A card stating "You have 11 reports to file." with a large "+ 11" icon and "Reports to be filed" below it.
 - Start a New Flat Fee Report**: A card stating "You may be eligible to file flat fee reports." with a large "+ 0" icon.
 - Continue a Report I've Started**: A card stating "You have 3 draft reports at this time" with a large "3" icon and "Draft Reports Waiting" below it.
 - View Past Reports**: A card with a magnifying glass icon.
- Billing Status**:
 - View Invoices**: A card stating "You have 9 Invoices due." with a large "\$ 9" icon and "Invoices Due" below it.



Guidance and Assistance Available

The screenshot shows the top navigation bar with the Canadian Stewardship Services Alliance logo and a search icon. Below the navigation bar, the user's name and role are displayed. The main content area features a search bar with the text "How can we help you?". Below the search bar, there are three main sections: "Guides" (represented by an open book icon), "Roles and Responsibilities" (represented by a group of people icon), and "Support" (represented by a speech bubble icon). A red box highlights the "Guides" icon, and a red arrow points to it from the "Guidebook for Stewards" link in the "Support" section.



*Click icon to
access
Guidebook
information*

The cover of the "Portal User Guide" document features the title "Portal User Guide" in a large, bold font. Below the title, it says "WeRecycle Registration and Reporting Portal January 2020". A large green banner at the bottom contains the text "Welcome to the WeRecycle Portal!" in white. The Canadian Stewardship Services Alliance logo is located at the bottom right corner of the cover.



Manage Contacts

The screenshot shows the user interface of the Canadian Stewardship Services Alliance portal. The user is logged in as John Smith, a member of the Steward Portal Engagement Committee, in a Test Environment. The navigation menu includes Reporting, Billing Status, Account Management (which is the active section), and Support. Under Account Management, there are two cards: 'Register for Another Program' and 'View/Edit Account'. The 'View/Edit Account' card displays the text 'We have 2 Contacts for your Company. Any changes?' and a red arrow points to the '2' in the '2 Contacts' indicator.

- Manage separately for each program;
- Must have Primary Contact (prepare and submit reports, manage contacts, obligation)
- Secondary, Billing and Environmental Lead Contacts



Obligation

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

The screenshot displays the user interface of the Canadian Stewardship Services Alliance portal. The top navigation bar includes the logo and the text 'Canadian Stewardship Services Alliance'. The user is logged in as 'John Smith | Steward Portal Engagement Committee' in a 'Test Environment'. The main navigation menu includes 'Reporting', 'Billing Status', 'Account Management', and 'Support'. The 'Reporting' section is active, showing options like 'Confirm your Obligation', 'Start a New Report', 'Continue a Report I've Started', and 'View Past Reports'. A red box highlights the 'Confirm your Obligation' button, with a red arrow pointing to it.

The 'Confirm your Obligation' page shows a table of reporting obligations. The table has columns for '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)', and '2016 Report (2015 data, 2017 invoice)'. The rows represent different programs: 'Recycle BC', 'Multi-Material Stewardship Western', 'Multi-Material Stewardship Manitoba', and 'Stewardship C'. The 'Multi-Material Stewardship Manitoba' row has a red question mark icon in the 2020 column, indicating that confirmation is needed for that year.

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			✓	✓	

A modal window titled 'Questions to be Answered - Multi-Material Stewardship Manitoba 2021' is displayed over the table. It contains the following text: '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'. There is a 'Close' button at the bottom right of the modal.



Obligation Options

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

The screenshot shows a web portal interface for the Canadian Stewardship Services Alliance. The header includes the organization's name and logo, a navigation menu with icons for user profile, home, and search, and the current page title "Confirm your Obligation". Below the header, the user is identified as "John Smith | Steward Portal Engagement Committee" and the environment is noted as "Test Environment". The main content area is titled "Determining Your Obligation(s)" and features a specific heading: "Multi-Material Stewardship Western • 2021 invoice, 2020 Report (2019 data)". The primary question is: "Is your organization an Obligated Steward under the Saskatchewan Multi-Material Stewardship Western in the following period: 2021 invoice, 2020 report (2019 data)?". A sub-note states: "Obligated Stewards will be invoiced in January 2021 based on their 2020 Annual Steward Report submitted by May 31st, 2020 (based on 2019 data)." There is a link for "More Information". At the bottom, four radio button options are provided: "Yes, Resident Obligated Steward", "Yes, Approved Voluntary Steward", "Not Obligated", and "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

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

Draft Reports Waiting

John Smith | Steward Portal Engagement Committee

Steward Reporting

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

The screenshot shows a mobile application interface for reporting options. At the top, there is a header bar with a user profile icon, a back arrow, the Canadian Stewardship Services Alliance logo, the text "Canadian Stewardship Services Alliance", a dropdown menu labeled "St...", a search icon, and a refresh icon. Below the header, the user's name "Michael Terry" and company "Widget Retail Inc." are displayed. A green circle with the number "1" indicates the current step, labeled "Program". The main content area contains a question: "5. Do any of the following apply to your report:" followed by a list of options: "Report by Percentage", "Report using Provincial Material List", "Report with Divisions", and "Report with Product Calculators". Below this list are two radio buttons, "Yes" and "No", with "No" selected. The next section is "6. Report by Percentage", with two radio buttons: "Report by Percentage" (selected) and "Report by Kg". The third section is "7. Choose a Material List", with two radio buttons: "National List" (selected) and "Provincial List". The fourth section is "8. Report Using Divisions", with two radio buttons: "Report Without Divisions" (selected) and "Report With Multiple Divisions". The fifth section is "9. Report Using Product Calculators", with two radio buttons: "Yes" and "No", with "No" selected. At the bottom of the form is a green button labeled "Save Preferences".



Enter Reporting Data

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

Material Quantities: First Division		Total All programs	MMSM	BC	SO
Material					
▼ Printed Paper					
Newspaper-CNA/OCNA Members	KG				<input type="text"/>
Other Newsprint-Non-CNA/OCNA Members	KG				<input type="text"/>
Newspapers	KG		<input type="text" value="1000"/>	<input type="text" value="1000"/>	
Newsprint (inserts and circulars)	KG		<input type="text" value="1"/>	<input type="text"/>	
Magazines	KG		<input type="text"/>	<input type="text"/>	<input type="text" value="1000"/>
Catalogues	KG		<input type="text" value="1000"/>	<input type="text" value="1000"/>	<input type="text" value="1000"/>
Directories	KG		<input type="text" value="1000"/>	<input type="text" value="1000"/>	<input type="text" value="1000"/>



Methodology

- Explain how you calculated your figures
- Detail is appreciated

The screenshot displays the 'Steward Reporting' portal interface. At the top, there is a navigation bar with a user profile icon, a home icon, the Canadian Stewardship Services Alliance logo, the text 'Steward Reporting', and a search icon. Below the navigation bar, the user is identified as 'John Smith | Steward Portal Engagement Committee' and the environment is 'Test Environment'. A progress indicator shows four steps: 'Material Quantities', 'Methodology' (which is the active step and highlighted with a green circle), 'Brands & Affiliates', and an unlabeled step. The main content area is titled 'Tell us About Your Methodology' and '2020 Report (2019 data, 2021 invoice)'. A green button labeled 'Copy From Previous Report' is visible. Below this, a message states: 'Please take a few moments to complete the following sections as the information is very helpful when conducting report validations.' The first section is '1. Preparation of Data', which includes the instruction: 'Please clearly describe the process you have used to calculate the data you reported.' Two questions are listed: 'How did you calculate your obligated sales? (Did you use sold-to sales information, bill-to sales information, population percentage method, etc.)' and 'How did you calculate your weights? (ABOM, supplemental calculator, vendor provided the information, used a scale to weigh packaging components, etc.)'. A text input field contains the text 'Conducted packaging audit for each SKU...'. The bottom of the page shows a vertical scrollbar on the right side.



Submitting Completed Report

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

The screenshot displays the 'Steward Reporting' interface. At the top, the user is identified as 'John Smith | Steward Portal Engagement Committee' in a 'Test Environment'. A progress bar shows four stages: 'Material Quantities', 'Methodology', 'Brands & Affiliates', and 'Report Submission', with the last stage being active. The main content area is titled '2020 Report (2019 data, 2021 invoice)' and 'Your Organization's Annual Steward Report'. It lists the company as 'Steward Portal Engagement Committee' and the user as 'John Smith', an 'Analyst' with Steward No. '0001008837'. A table entry shows the report title 'Canadian Stewardship Services Alliance 2020 Report (2019 data, 2021 invoice)' with a value of '82,300 kg'. Below this is a section for '2. Terms and Conditions' with a 'Download Terms and conditions' link. The 'Terms and Conditions' section includes a list of confirmation points and a checked checkbox for 'I agree and confirm the above'. A 'Submit Report' button is located at the bottom of the form.



Report Validation

- All reports are reviewed for accuracy – vital step in fee setting
- Validation process begins with submitted report
- Common issues include:
 - Updates to brands and methodology.
 - Explanation of material tonnage variances
 - Deduction methodology review



**Canadian Stewardship
Services Alliance**

Q&A

Reporting deadline is May 31

Webinar presentation available online

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**Canadian Stewardship
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Thank You!

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