



**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 displays a webcast interface with several components:

- Media Player (2):** Shows a video of Calla Farn, Vice-President, Corporate Affairs, with the Canadian Stewardship Services Alliance logo.
- Q&A (3):** A text input field with the placeholder "Please enter a question" and a "Submit" button.
- Resource List (4):** A list of links: "Report to Stewards", "Today's Presentation", and "Program Plan Consultation".
- Slides (1):** The main presentation slide titled "Ready to Report" for a "Webinar for New Stewards and Reporters" on "Packaging and Paper Product Reports". The speakers listed are Calla Farn, VP Corporate Affairs; Natalia Chornobay & Paolo Di Bartolomeo, NSS.
- Navigation Bar:** A bottom 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. Reporting Resources
2. Materials and Data Preparation
3. Upgraded WeRecycle Portal
4. Questions & Answers



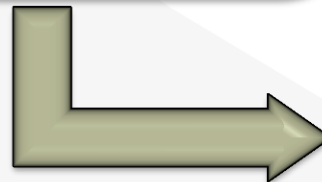
# Reporting and Invoice Cycle

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

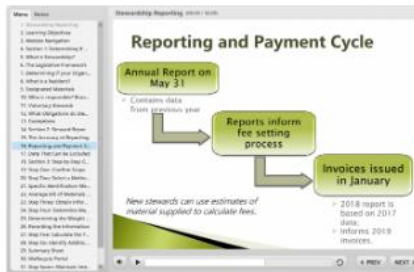
2020 Guidebook for Stewards



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](mailto:stewards@cssalliance.ca)



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# Guidebook For 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.



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# Materials Tool



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**Is it packaging?**



**Is it paper product?**

Not sure? 



## 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

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

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



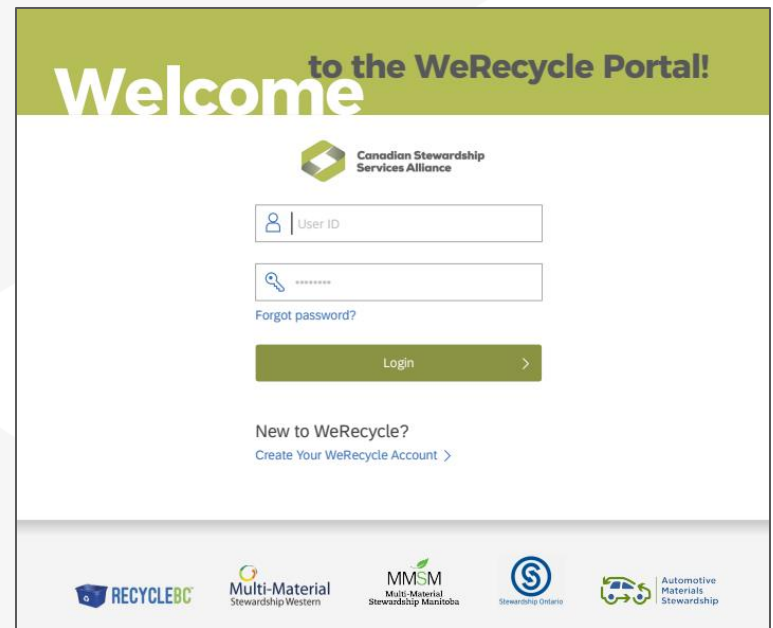
**Canadian Stewardship  
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Speaker icon, Play button, Progress bar, Refresh icon, < PREV, NEXT >



# 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

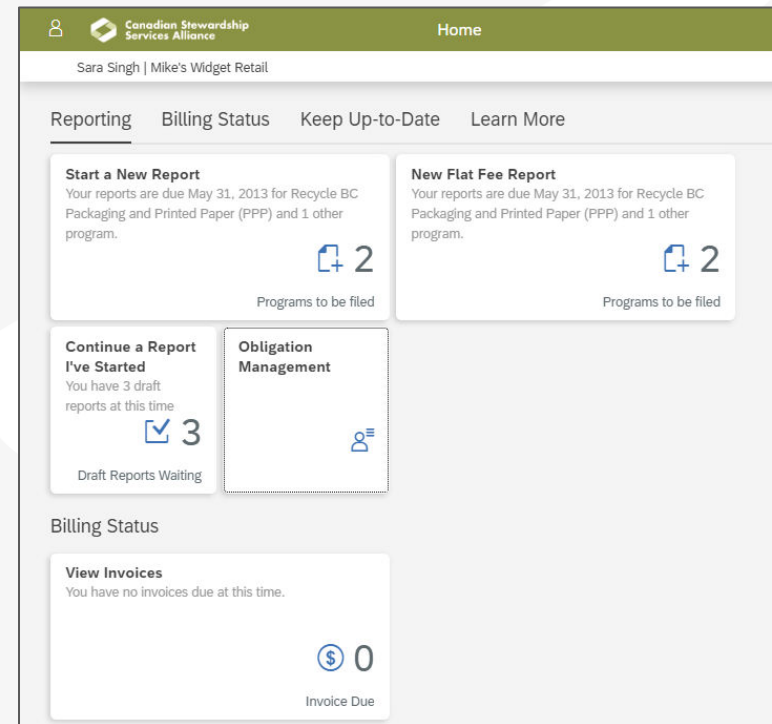


*New password security requirements*



# 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







# 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 and several navigation options: Reporting, Billing Status, Account Manager, Support, Contact Us, and Guidebook for Stewards. A red box highlights the Guidebook for Stewards icon, and a red arrow points to it. Another red box highlights the Guides icon, and a red arrow points to it. The bottom of the screenshot shows the RECYCLEBC logo.



*Click icon to  
access  
Guidebook  
information*

The cover of the Portal User Guide 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 word "Welcome" in white, followed by "to the WeRecycle Portal!" in black. The Canadian Stewardship Services Alliance logo is in the bottom right corner.



# Obligation

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

The screenshot shows the user interface of the Canadian Stewardship Services Alliance portal. The top navigation bar includes the logo and the text 'Canadian Stewardship Services Alliance' and 'Home'. Below this, the user is identified 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 highlighted, and a red box around the 'Confirm your Obligation' link has a red arrow pointing to it. Other options include 'Start a New Report' (11 reports to file), 'Continue a Report I've Started' (3 draft reports), and 'View Past Reports'. A '1 Reports to be filed' notification is also visible.

The 'Confirm your Obligation' page shows a table of reporting obligations. The table has columns for 'Your Obligation Status' and years from 2020 to 2016. A red question mark icon is present in the 2020 column for 'Multi-Material Stewardship Manitoba'. A tooltip is displayed over this icon, stating: '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.' A 'Close' button is at the bottom of the tooltip.

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			✓	✓	✓



# 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 interface for the Canadian Stewardship Services Alliance. The header includes the organization's name and a search icon. The user is identified as John Smith, a member of the Steward Portal Engagement Committee, in a Test Environment. The page title is "Confirm your Obligation". The main content area is titled "Determining Your Obligation(s)" and focuses on "Multi-Material Stewardship Western • 2021 invoice, 2020 Report (2019 data)". It asks the user if their organization is an Obligated Steward under the Saskatchewan Multi-Material Stewardship Western in the specified period. A note states that Obligated Stewards will be invoiced in January 2021 based on their 2020 Annual Steward Report submitted by May 31st, 2020 (based on 2019 data). A "More Information" link is provided. At the bottom, there are four radio button options: "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 the Canadian Stewardship Services Alliance. The user is Michael Terry at Widget Retail Inc. The screen displays a 'Program' section with a numbered list of reporting options. Option 5 asks if any of the following apply: Report by Percentage, Report using Provincial Material List, Report with Divisions, or Report with Product Calculators. Option 6 allows selecting between Report by Percentage and Report by Kg. Option 7 allows selecting between National List and Provincial List. Option 8 allows selecting between Report Without Divisions and Report With Multiple Divisions. Option 9 asks if Report Using Product Calculators apply, with Yes and No buttons. A 'Save Preferences' button is at the bottom.

Michael Terry | Widget Retail Inc.

1 Program

5. Do any of the following apply to your report:  
Report by Percentage  
Report using Provincial Material List  
Report with Divisions  
Report with Product Calculators  
 Yes  No

6. Report by Percentage  
 Report by Percentage  Report by Kg

7. Choose a Material List  
 National List  Provincial List

8. Report Using Divisions  
 Report Without Divisions  Report With Multiple Divisions

9. Report Using Product Calculators  
 Yes  No

[Save Preferences](#)



## 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: <b>First Division</b>		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' web application interface. At the top, there is a navigation bar with the Canadian Stewardship Services Alliance logo, a home icon, a back icon, and a search icon. The user is identified as 'John Smith | Steward Portal Engagement Committee' and the environment is 'Test Environment'. Below the navigation bar, there are four tabs: 'Material Quantities', 'Methodology' (which is selected and highlighted in green), 'Brands & Affiliates', and an unlabeled tab. 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.' Below this, there are two questions: '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...'



# Submitting Report

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

The screenshot shows the 'Steward Reporting' interface. At the top, there is a navigation bar with the Canadian Stewardship Services Alliance logo and the text 'Steward Reporting'. Below this, the user's name 'John Smith | Steward Portal Engagement Committee' and the environment 'Test Environment' are displayed. A progress indicator shows four steps: 'Material Quantities', 'Methodology', 'Brands & Affiliates', and 'Report Submission', with the last step being active. The main content area is titled '2020 Report (2019 data, 2021 invoice)' and contains the following information:

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

The screenshot displays the user interface of the Canadian Stewardship Services Alliance portal. The top navigation bar includes the logo, user name 'John Smith | Steward Portal Engagement Committee', and the environment 'Test Environment'. The main navigation menu has tabs for 'Reporting', 'Billing Status', 'Account Management', and 'Support'. The left sidebar contains four cards: 'Confirm your Obligation', 'Start a New Report' (with 12 reports to file), 'Continue a Report I've Started' (with 3 draft reports), and 'View Past Reports' (highlighted with a red box and arrow). The main content area shows the 'Past Reports' section with a search and filter interface. Below the filters is a table titled 'All Reports (17)' with columns for Program, Invoice Period, Report Period, Data Period, Sales Order, Report Status, and Report. A 'Download All Reports' link is also present.

	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	<a href="#">View PDF</a>
<input type="checkbox"/>	Canadian Stewardship Services Alliance	2021	2020	2019	0040004188	In Progress	<a href="#">View PDF</a>
<input type="checkbox"/>	Canadian Stewardship Services Alliance	2020	2019	2018	0040004187	In Progress	<a href="#">View PDF</a>
<input type="checkbox"/>	Canadian Stewardship Services Alliance	2019	2018	2017	0040004186	Report Submitted	<a href="#">View PDF</a>
<input type="checkbox"/>	Multi-Material Stewardship Manitoba	2020	2019	2018	0040004176	Report Submitted	<a href="#">View PDF</a>
<input type="checkbox"/>	Canadian Stewardship Services Alliance	2020	2019	2018	0040004154	Report Submitted	<a href="#">View PDF</a>
<input type="checkbox"/>	Canadian Stewardship Services Alliance	2019	2018	2017	0040004151	Report Submitted	<a href="#">View PDF</a>



## 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



# Q&A

Reporting deadline is May 31  
Webinar presentation available online



**Canadian Stewardship  
Services Alliance**

# **Thank You!**

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

**1-888-980-9549**

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