



**Canadian Stewardship
Services Alliance**

Ready to Report

Webinar for New Steward Reporters

2021 Packaging and Paper Product Reports

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National Steward Services

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**Canadian Stewardship
Services Alliance**

Welcome

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

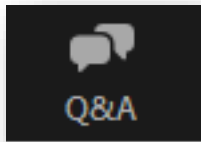




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Webcast Information

- 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



**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



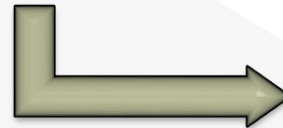
Reporting and Invoice Cycle

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.



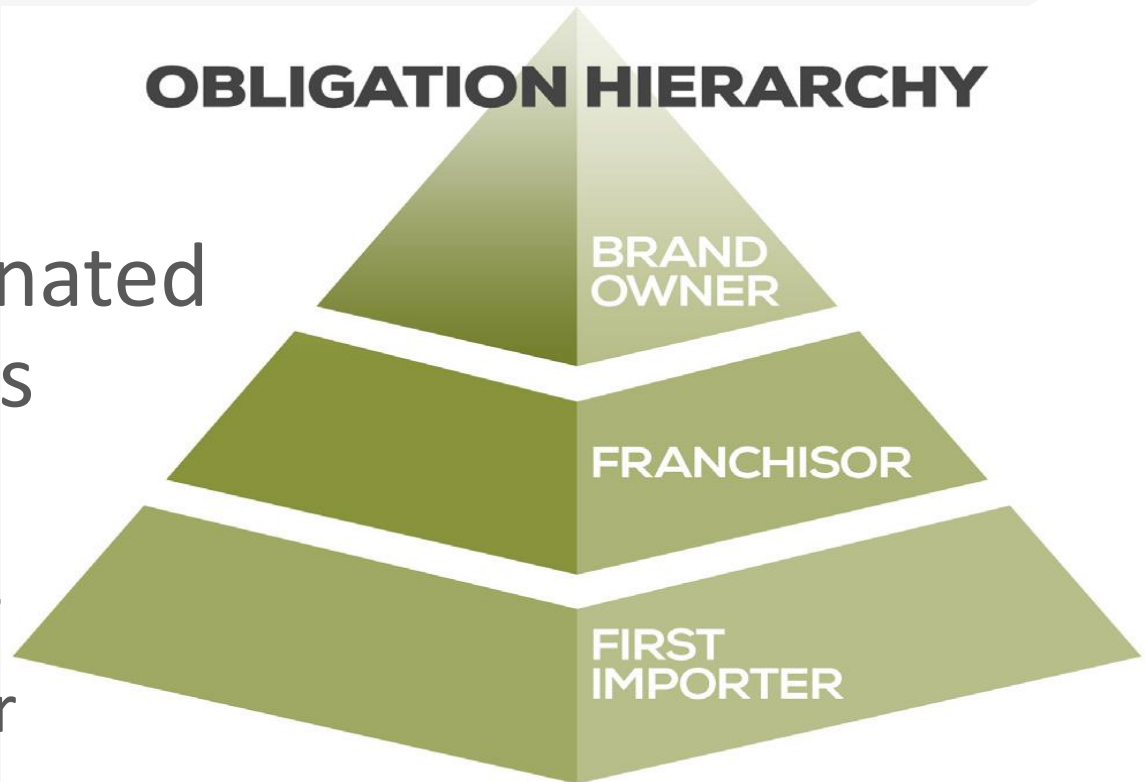
Reporting Overview

- 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
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

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 or 1-888-980-9549

Canadian Stewardship Services Alliance

Search here... [Contact Us](#)

[ABOUT](#) [PROGRAMS](#) [INFORMATION SESSIONS](#) [REPORTING RESOURCES](#) [NEWS](#) [CAREERS](#)

2021 Reporting Resources

2021 Guidebook for Stewards

Helping Businesses Meet Their Packaging & Paper Product Recycling Obligations in Canada
Updated January 2021

GUIDEBOOK FOR STEWARDS

Materials Tool

Is it packaging? Is it paper product?

Reporting Overview Tutorial

Reporting and Payment Cycle

Annual Report on May 31

Reports submit for setting process

Provinces issued in January

ABOM Tutorial

Benefits of the ABOM Method

Stewards can determine the material weight loads for a group of products by calculating the average weights of various materials.

ABOM method assumes the same quantities of each product within the group are known.

This allows for a distribution of packaging and paper product proportion to be weighted relative to its percentage of total sales.

- ▶ [Using the WeRecycle Portal](#)
- ▶ [Rules, Policies & Forms](#)
- ▶ [Preparing Your Report](#)
- ▶ [Ready to Report Webinars](#)

cssalliance.ca/2021reporting/



**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.

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

PREV

NEXT



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

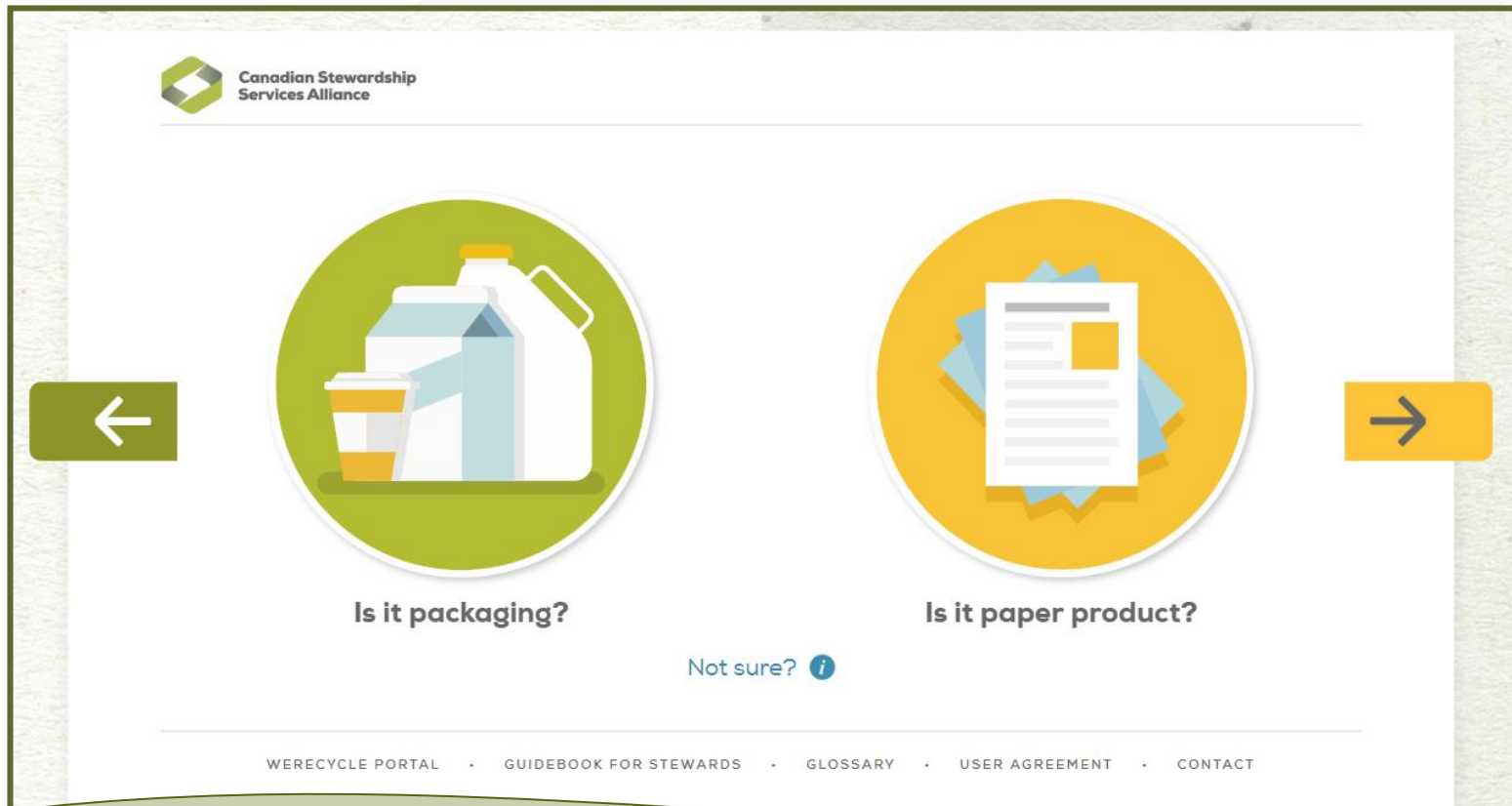
- Report only designated PPP supplied to consumers
- Exclusions: IC&I, Transportation/Distribution, Durable
- Deductions: form required
- PPP material categories and sub-categories:
 - Paper Products
 - Packaging: Paper, Plastic, Steel, Aluminum, Glass
- Components





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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
					TOTAL	150.0	260.0	200.0	500.0



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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.

A screenshot of the WeRecycle Portal login page. The page has a green header with the text "Welcome to the WeRecycle Portal!". Below the header is the Canadian Stewardship Services Alliance logo. There are two input fields: "User ID" and "Password". Below the password field is a link "Did you forget your password?". A green "Login" button is below the links. At the bottom, there is a link "New to the WeRecycle Portal? Create an Account". The footer contains logos for RECYCLEBC, Multi-Material Stewardship Western, MMSM Multi-Material Stewardship Manitoba, Stewardship Ontario, and Automotive Materials Stewardship.

to the WeRecycle Portal!

Welcome

Canadian Stewardship Services Alliance

User ID

Password

[Did you forget your password?](#)

Login

New to the WeRecycle Portal?
[Create an Account](#)

RECYCLEBC Multi-Material Stewardship Western MMSM Multi-Material Stewardship Manitoba Stewardship Ontario Automotive Materials Stewardship

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

The screenshot shows the WeRecycle Portal interface. At the top is a green header with the Canadian Stewardship Services Alliance logo, a 'Home' link, and a 'Contact us' button. Below the header is a navigation bar with links for 'Reporting', 'Billing Status', 'Account Management', and 'Support'. The 'Support' section is active, showing a 'Support' heading and three cards: 'Contact Us', 'Guidebook and Reporting Resources' (highlighted with a red box and a green star with the number 1), and 'What's New'. Below these cards is a search bar with the text 'How can we help you?'. At the bottom of the page, there are two columns of links. The left column is titled 'Guidebook for Stewards (Packaging and Paper Product)' and includes links for '2021 Updates to the Guidebook', 'Part One: Are you a steward?', 'Part Two: How to prepare your steward report', and 'Part Three: WeRecycle Material List'. The right column is titled 'Reporting Hub' and includes links for 'Product Information', 'Sector Tips', and 'FAQ'. A green star with the number 2 is placed next to the 'i' icon in the bottom right corner. A green star with the number 3 is placed next to a chat window on the right side of the page. The chat window has a green header with the text 'Chat with us!' and a search icon. The main area of the chat window is white and contains a message: 'Hello, and thank you for using the WeRecycle Portal's live chat service. How can I help you today?'. Below the message is a text input field with the placeholder text 'Type your message...' and a send icon.

1

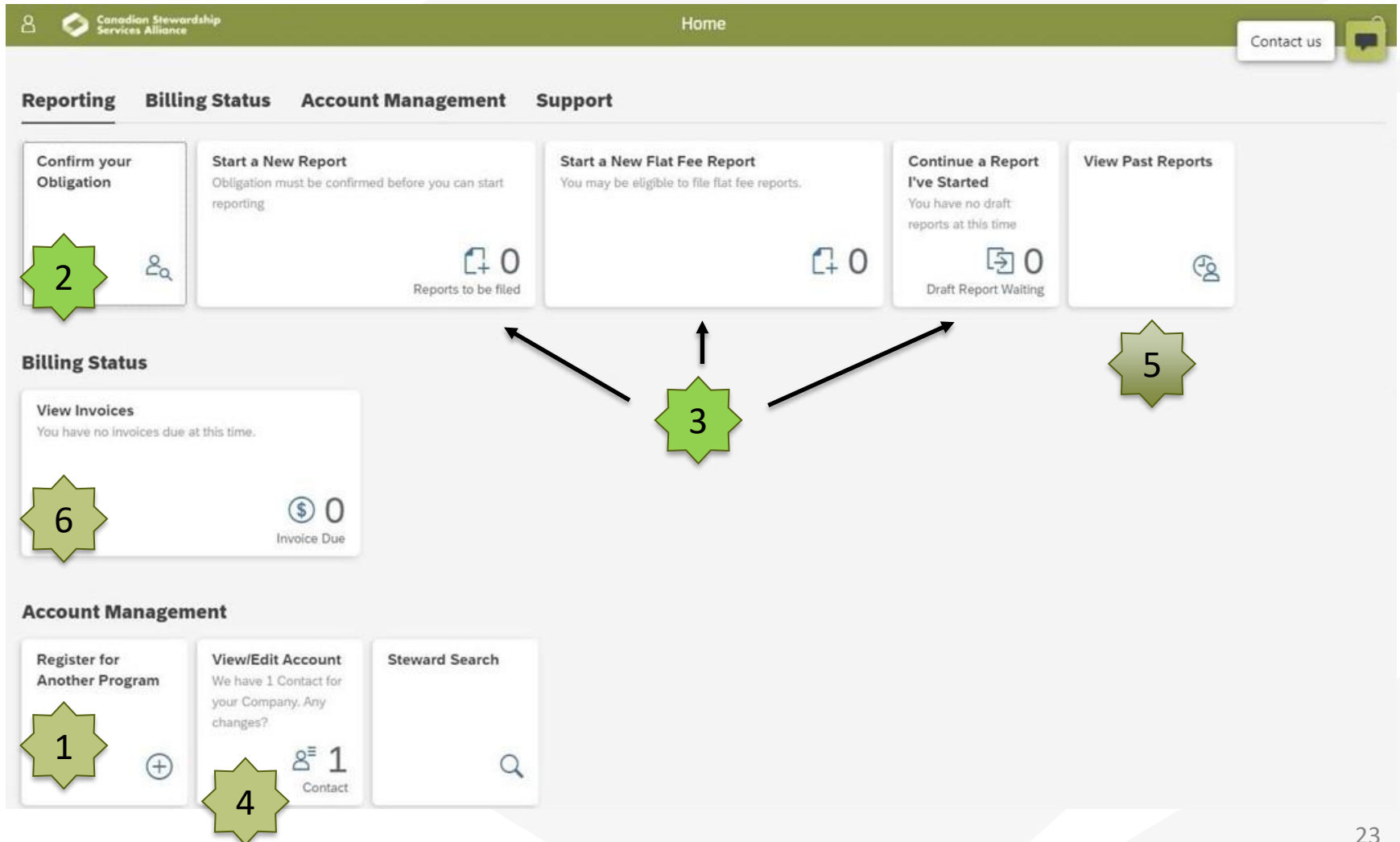
2

3

Click icon to access
Guidebook information



Portal Overview





Obligation Update

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




Confirm your Obligation

Contact us



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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Services Alliance

Confirm your Obligation ▾





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

The screenshot shows the 'Reporting' section of the Canadian Stewardship Services Alliance dashboard. The dashboard has a green header with the logo, 'Home' link, and 'Contact us' button. Below the header is a navigation bar with links: Reporting, Billing Status, Account Management, Support, and Admin. The main content area displays four cards. The first card is 'Confirm your Obligation' with a magnifying glass icon. The second card is 'Start a New Report' with the text 'Obligation must be confirmed before you can start reporting' and a report icon with '0' and 'Reports to be filed'. The third card is 'Start a New Flat Fee Report' with the text 'You may be eligible to file flat fee reports.' and a report icon with '0'. The fourth card is 'Continue a Report I've Started' with the text 'You have no draft reports at this time' and a report icon with '0' and 'Draft Report Waiting'. A fifth card 'View Past Reports' with a magnifying glass icon is partially visible on the right. A red rectangle highlights the three report-related cards.

Reporting	Billing Status	Account Management	Support	Admin
Confirm your Obligation Magnifying glass icon	Start a New Report Obligation must be confirmed before you can start reporting Report icon + 0 Reports to be filed	Start a New Flat Fee Report You may be eligible to file flat fee reports. Report icon + 0	Continue a Report I've Started You have no draft reports at this time Report icon + 0 Draft Report Waiting	View Past Reports Magnifying glass icon



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

2021 Report (2020 data, 2022 invoice)

Total weight: 20,425,500 kg

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 a user profile icon, navigation arrows, the 'Canadian Stewardship Services Alliance' logo, and a 'Steward Reporting' dropdown menu. Below the navigation bar is a progress bar with five steps: 'Calculator Selection', 'Product Calculators', 'Material Quantities', 'Methodology' (which is the active step, highlighted in green), and 'Brands & Affiliates'. 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 are four sections:

- (A) A large text input box for writing 'NONE' or 'YES'.
- (B) A checkbox labeled 'Please check the box if you claimed a deduction in your report'.
- (C) A section titled 'If you have claimed deductions, please download and complete the deduction declaration form.' containing a 'Download template' button.
- (D) A section titled 'Please upload your completed deduction declaration form.' containing an 'Upload' button, a text input field, and a 'Browse...' button.

At the bottom, there is a section titled '4. Increases and Decreases' with the 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.' followed by a large text input box.



**Canadian Stewardship
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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