Portal User Guide

WeRecycle Registration and Reporting Portal

Canadian Stewardship Services Alliance

Canadian Stewardship
Services Alliance

WeRecycle Registration and Reporting Portal

Welcome to the WeRecycle Registration and Reporting Portal

Canadian Stewardship Services Alliance (CSSA) offers the WeRecycle Registration and Reporting Portal (the Portal) as a place where Stewards can meet their reporting and payment obligations under Packaging and Printed Paper programs in British Columbia, Saskatchewan, Manitoba and Ontario. It also supports Ontario's Municipal Hazardous or Special Waste program.

Is my company or organization a Steward?

To be a Steward, a company or organization must:

- meet the residency requirements as defined for each province
- supply any packaging or printed paper into the province where
  the company or organization has residency and Steward obligations
- be responsible for the designated packaging and printed paper as a brand owner,
  first importer, or franchisor in the province where the Steward has residency

Get started

The Portal can be found online at https://werecycle.cssalliance.ca. This website is designed to work on common internet browsers including Apple Safari, Google Chrome, Firefox, and Microsoft Internet Explorer 9.0 or 10.0.

To use every available feature, configure your internet browser to allow pop-up windows from this website. If you need help configuring your internet browser to allow pop-up windows, visit one of the websites listed below.

- **Apple Safari**
  http://www.cssalliance.ca/wp-content/uploads/2013/10/SAFARI2.pdf

- **Google Chrome**
  http://www.cssalliance.ca/wp-content/uploads/2013/10/CHROME1.pdf

- **Firefox**
  http://www.cssalliance.ca/wp-content/uploads/2013/10/FIREFOX2.pdf

- **Microsoft Internet Explorer 9.0**
  http://www.cssalliance.ca/wp-content/uploads/2013/10/IE91.pdf

- **Microsoft Internet Explorer 10.0**
  http://www.cssalliance.ca/wp-content/uploads/2013/10/IE102.pdf

How to move around and enter information

Users of the WeRecycle Registration and Reporting Portal (the Portal) can move from page to page and enter data with ease.
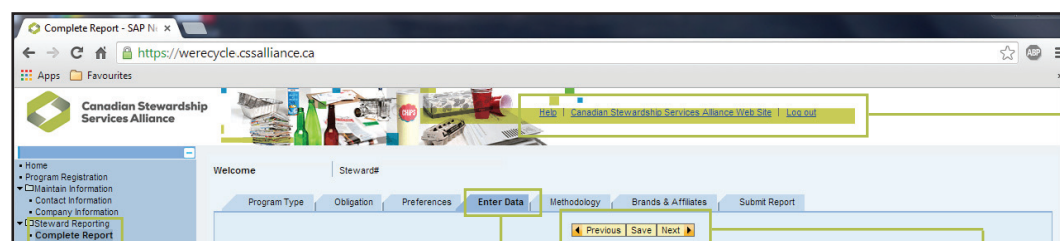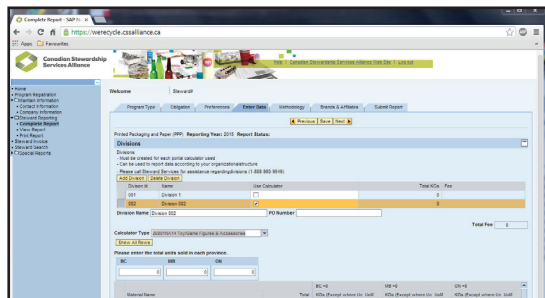
Home links
Ask for help with the Portal, visit the CSSA website, or log out of the Portal using the home links.

Navigation bar
The blue navigation bar lists every option in the Portal. The option you are viewing will be highlighted in a darker blue.

Tabs
A selected option might have several pages. Each page is labelled with a tab. The page you are viewing will be highlighted in a darker blue.

Navigation icons
Save data or move from one tab to the next by clicking a yellow navigation icon.

Radio buttons
Click a round radio button to select an option. A selected radio button will have a dot in the middle.

Text fields
Click any white text field to enter data. Text fields marked with * must be filled. Blue text fields are filled automatically.

Check boxes
Click any white check box to select an option. Blue check boxes are not available options. A selected check box will be filled with a check mark.

Expand or collapse a list
Click a ▶ icon to view a list.

Click a ▼ icon to hide a list.

Dropdown menus
Click a dropdown menu icon to display a list of options. The selected option will be yellow.

View pages
Shows a dropdown menu of pages within a selected option.

Scroll bars
Click and drag a scroll bar to move around a window.

Open tray
Display every row of data.

Jump to the last tab.

Jump to the first tab.

User ID and Password

Stewards must register to use the WeRecycle Registration and Reporting Portal (the Portal). Once you have a User ID and Password, you will be able to report and pay obligations under participating programs. Click the Register Now link to begin.

Create a User ID and Password

1 **Login information** – Create a User ID with no more than 12 characters (including spaces). Consider combining your first initial and surname. This unique User ID will be needed every time you use the Portal. Type your first name, last name and email address in the supplied text fields, and confirm your email address in the final text field. Once all this information is entered, click the **Next** icon.

2 **User type selection** – Click one of the round radio buttons to select a user type for your company or organization. You can identify as a Steward of Packaging and Printed Paper (PPP) and/or Municipal Hazardous or Special Waste (MHSW), or as a service provider for the Municipal Hazardous or Special Waste (MHSW) program. If you are both a Steward *and* a service provider, register first as a Steward. Once this registration is complete, you can repeat the Register Now process to create a second User ID and register as a service provider.

   A black dot will appear in the middle of a radio button that has been selected. Once you select a user type, click the **Proceed with Registration** icon to continue. Click the **Previous** icon to review or change text supplied in the Login Information page.

3 **Confirmation** – A Confirmation page will appear when the information has been submitted. Check your email inbox for a message from werecycle@cssalliance.ca, with a subject line of WeRecycle Password and System Information. This will include a temporary Password.

! If you copy and paste the temporary Password included in the email, be careful to highlight only the text. Do not copy any spaces which appear around the temporary Password.

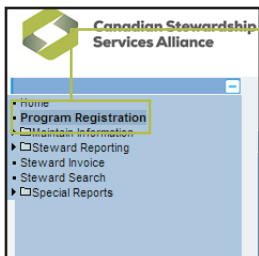## Log On with your User ID and Password

1. Go to the Portal at https://werecycle.cssalliance.ca.

2. Enter your User ID and Password into the supplied text fields.

3. Click the Log On icon.

Log On

Did you forget your Password?

Request a new Password by clicking the Get Support link. This link is below the **Log On** icon.

To register as a Steward, you must be authorized to confirm that your company or organization participates in a province's Packaging and Printed Paper program and/or Municipal Hazardous or Special Waste program. You will also need information about your company's residency for each program, as well as gross sales figures within each program's jurisdiction. Once you are ready to register, click the **Next** icon.

Register to use the Portal

1 Contact information – Enter contact details for you and your company. Data can be typed in the white text fields. Every text field marked with an * must be completed. Once your contact information is complete, click the **Submit Registration** icon.

2 Program selection – Choose the programs in which your company or organization will participate. The available programs are provided as a list. Click every check box that applies to your company or organization, and then click the **Next** icon.

3 Confirm provincial residency – A Provincial Residency Validation window will appear. Confirm that your company or organization has residency in a program's jurisdiction. Residency means an organization or company has a permanent establishment in a province where stewardship obligations have been regulated. A permanent establishment can include an office, workshop, factory, warehouse or some other type of fixed place of business such as an employee's home office. Refer to Section 1.7 of Canadian Stewardship Services Alliance's (CSSA's) National Guidebook for a complete definition of residency.

4 Obligation – A list of questions will appear for each program and year. Click every box that applies to your company or organization. To view the full list of questions for a specific program or obligation year, click its ▶ icon. Based on the answers, the obligation status column will show whether your company or organization is obliged to report. Some provinces allow a non-resident business to register as a Voluntary Steward. Refer to Section 1.8 of CSSA's National Guidebook for further clarification. You must **click the Confirm Answers icon for every program and year** to be able to enter data in your report before moving to the next page. Click and drag the scroll bar on the right side of the window to see the full list of programs and obligation years. Click the **Next** icon to continue.

5 Contact information – Assign a Primary Contact for each program. A Primary Contact can confirm obligation questions, enter data, and submit reports to CSSA. A Secondary Contact can confirm obligation questions and enter data, but cannot submit reports. Optional Environmental Leads will receive communications from CSSA, but cannot log on to the Portal. Billing Contacts will receive copies of invoices and financial statements relating to the Steward's account.

* The only way to move between program registration pages is to use the yellow navigation icons (such as Previous, Next, or Submit Registration).

! Warning: You will have 30 minutes to register once you begin. A session which takes any longer than this will "time out", and all the information you entered will be lost. All the information will also be lost if you do not complete a session, so be sure to assign a Primary Contact to all relevant programs.

How to enter information

a. Each page in Program Registration is identified with a tab. The page you are viewing will be shown as a dark blue tab.

b. Data in a blue text field is filled automatically, but data in a white text field can be changed. Point and click on a white text field to enter or change the field's data.

c. Information must be provided wherever you see a red asterisk (*).

d. To save your data and move to another step in the registration process, click the ◀ Previous or Next ▶ icon. These icons are near the top of the window, just below the tabs.

Maintain Contact Information

A company or organization can register multiple users on the WeRecycle Registration and Reporting Portal (the Portal). The Contact Information page offers a place to provide the contact information for each user and manage the roles each user will play in a program.

Add or change contact information
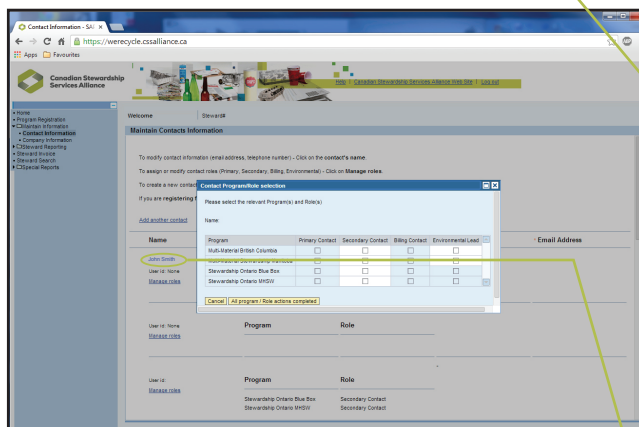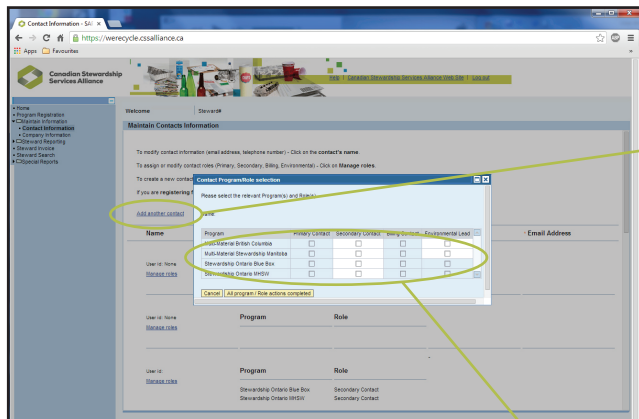
✱ A welcome message will appear at the top of the Maintain Contacts Information screen. It will show your User ID and 7-digit Steward Number. If this is not your User ID and Steward Number, log out using the link at the top of the screen. Then use your unique User ID and Password to log on to the Portal.

❗ When registering for any new program, one of the contacts must be listed as the Primary Contact.

❗ A contact must have a User ID to access the Portal.

1 **Create a new contact** – Click the Add Another Contact link on the left side of the window to create a new contact. Fill the white text fields with the contact's first name, last name, telephone number and email address. Optional data can include a job title, fax, extension, address, city, country, province/state, or postal/zip code. Click the icon next to the country or province/state fields to access a dropdown menu of options.

Once the contact information is complete, click the **Save** icon. To cancel changes, click the **Cancel** icon. To delete the contact, click the **Delete** icon.

2 **Manage roles** – To view or change a contact's roles, click the Manage Roles link under the contact's User ID. A Contact Program/Role Selection window will appear, showing a checklist of 4 potential roles for each program:

• **Primary Contacts** – can confirm obligation questions, enter data, and submit reports to Canadian Stewardship Services Alliance (CSSA). The Steward identifies this individual as the officer or agent under whose authority a Steward's report is filed or amended.

• **Secondary Contacts** – can confirm obligation questions and enter data, but cannot submit reports.

• **Environmental Leads** – will receive communications from CSSA, but cannot log on to the Portal. Environmental Leads are optional roles.

• **Billing Contacts** – will receive copies of invoices and financial statements relating to the Steward's account.

To assign a role to the contact, click a white check box. A check mark will appear in the box if a role is selected. The light blue check boxes are filled automatically by the Portal. It is possible to register the same person as both a Secondary Contact and an Environmental Lead, but there can be only one Primary Contact per program. Confirm choices by clicking the **All Program/Role Actions Completed** icon. Cancel choices by clicking the **Cancel** icon.

3 **Modify contact information** – To change a contact's information, click the contact's name. Fill the white text fields with the new telephone number and email address, job title, fax, extension, address, city, country, province/state, or postal/zip code. Click the icon next to the country or province/state field to access a dropdown menu of options.

Once the contact information is complete, click the **Save** icon. To cancel any changes, click the **Cancel** icon. To delete the contact, click the **Delete** icon.

Only Primary Contacts can delete Secondary, Environmental, or Billing Contacts. Primary Contacts can only be changed by contacting Steward Services and completing the Primary Contact Change form.

Add or change company information

1 **Choose a province** – Click the round radio button to choose the jurisdiction for which you are reporting as a Steward. The selected radio button will have a black dot in the middle.

2 Provide **company information** – Company information can be typed in any white text field. Every text field marked with a red asterisk (*) must be filled before continuing. Every blue text field is filled automatically.

3 **Choose a sector** – Use the dropdown list of options to choose the sector which best describes your company or organization.

4 **Click** the yellow **Save** icon when finished.

Complete Report

Once registered to use the WeRecycle Registration and Reporting Portal (the Portal), you can begin reporting data to complete obligations as a Steward.
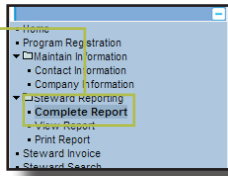
Complete a Steward Report in 7 steps

1 **Program type** – Click the round radio button to identify the program for which you are reporting. The options include Printed Packaging and Paper (PPP), or Municipal Hazardous or Special Waste (MHSW). Click the **Next** icon to continue.

2 **Obligation** – Click the ▶ icon next to the **obligation year** for which you are reporting. This will expand the list of programs for that year. As an example, your 2014 reporting year would contain 2013 data for which you will be billed in 2015.

The obligation status column will confirm if you are obligated or not obligated to report data. The report status column can also show if an existing report is in progress (BB Rpt in Progress), or if the year's data cannot be changed (Year Locked).
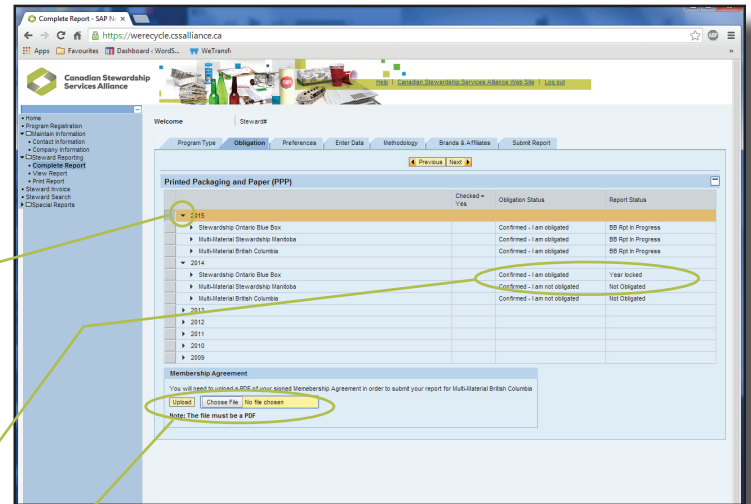
Membership agreement – For applicable programs, upload a completed .pdf of the membership agreement for your company or organization. Click the **Choose File** icon to search your computer for the document. After selecting the file from your hard drive or network, click the **Upload** icon.

3 **Preferences** – Identify how your company or organization wants to report and manage invoices.

- **Material lists** – Click the round radio buttons to identify whether you want to use a national material list or a provincial material list when reporting. The provincial material lists are displayed as per the rules for each specific program. But those who use the national material list will eliminate the need to consult multiple provincial lists.
- **National or provincial** – Click the round radio button to choose how you want to report. You have 3 reporting choices:
    1. Use the standardized national material list and report separately by province.
    2. Use the standardized national material list and report all provinces at once.
    3. Report one province at a time using the material list included in the rules of the membership agreement by province.
- **Invoicing** – Choose to receive:
    - one invoice every quarter
    - one annual invoice
    - all four quarterly invoices at once, with a separate due date for each quarter
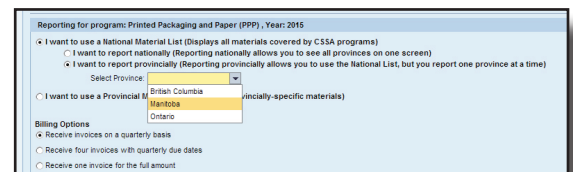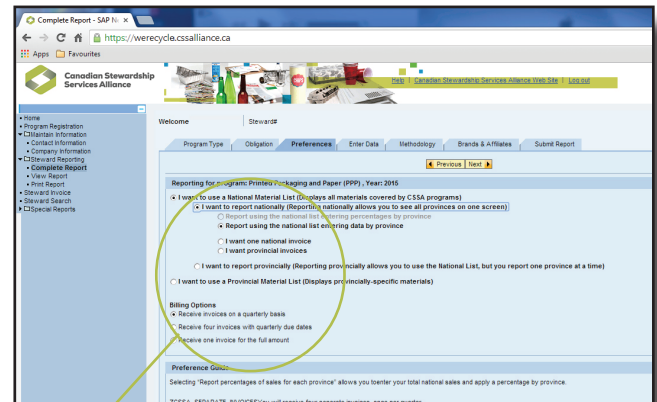
✳ If reporting data for an individual province, select that province from the dropdown menu.

✳ All reports are listed chronologically. The portal will automatically default to the earliest available time period.

4 **Enter data** – Click the white cell in the spreadsheet to enter the weight of material your company or organization supplies into the jurisdiction. Data should be in the form of kilograms unless another Unit of Measurement (UoM) has been identified.

If you have used portal calculators in the past, you will need to create a separate division for each calculator that is used.

Click the **Save** icon at any time to save entered data. To move to the next screen, click the **Next** icon.

5 **Methodology** – The white text fields in the Methodology page are used to clarify supplied data. Please be as clear as possible when providing details.

- **Data** – Describe how you arrived at supplied data. Refer to tools such as software, mathematical formulas, packaging weights, or Average Bill of Materials (ABOM).
- **Changes** – Explain methods that have changed since the previous report was submitted (e.g., a supplied calculator is no longer used).
- **Actual deductions** – Identify types of Packaging and Printed Paper materials that were not included in the report and why. Also explain how these deductions were determined or calculated (e.g., customer survey).
- **Increases/decreases** – Explain the reason for any significant changes in the data (e.g., higher sales volumes or lighter packaging).

* Data can only be entered in the spreadsheet's white cells.

Control what you see
- Click the ▶ icon to see every option within a main category.
- To see every available option when entering data, click the Expand All icon.
- To see only the main categories, click the Collapse All icon.
- To hide historical data, click the Hide Prior Report's Data icon.
- Click and drag the vertical scroll bar at the right edge of the window to view hidden content above or below. Click and drag the horizontal scroll bar across the bottom of the window to view content to the left or right.

Complete Report (Continued)

6 **Brands and affiliates** – List every brand name or trademark reflected in the data. This list will include all private labels and brands for which your company or organization is responsible. Limit one brand or affiliate to each cell in the chart. You can also follow the steps below to upload a spreadsheet including multiple brands and/or affiliates.

- **Brands** – To enter the list of brands and affiliates using a separate spreadsheet, click the **Download Template** icon. This template will be a .csv file that can be opened in spreadsheet software such as Microsoft Excel. Enter your data in the spreadsheet but do not change any formatting.

  When the spreadsheet is complete, save it as a .csv file. Return to the Brands and Affiliates page and click the **Upload Completed Spreadsheet** icon. Find the completed .csv file saved on your computer or network, and upload the information.

  To use the same list as a previous report, click the **Copy from Previous Report** icon.

- **Affiliates and/or franchisees** – List the names of affiliated companies and franchisee locations included in the submitted data. To enter the list of affiliates and/or franchisees using a separate spreadsheet, click the **Download Template** icon. This template will be a .csv file that can be opened in spreadsheet software such as Microsoft Excel. Enter your data in the spreadsheet but do not change any formatting. When the spreadsheet is complete, save it as a .csv file. Return to the Affiliates and/or Franchisees page and click the **Upload Completed Spreadsheet** icon. Find the completed .csv file saved on your computer or network, and upload the information.

- **Changes** – Identify any previous brands or private labels that were removed, and why the change was made (e.g., the sale or acquisition of a brand). Include the names of purchasers or sellers, and the dates of the related transactions. To copy a previous report's notes about changes, click the **Copy from Previous Report** icon. You can copy and edit text if you are using the same preferences when reporting.

Click the **Save** icon at the bottom of the window to save entered data. To move to the next screen, click the **Next** icon found just under the tabs.

7 **Submit report** – Once all the data has been entered, it is time to submit your report to Canadian Stewardship Services Alliance (CSSA). Review the terms and conditions published on the Portal before agreeing, and then click the **Submit** icon. Please note that the initial amount owing may be displayed as $0 until fees have been set.
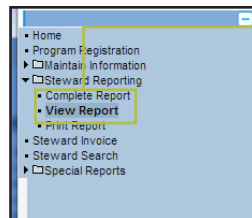
Terms and conditions – By clicking on the **Submit** icon, you confirm the following:

- You are either the Primary Contact for your company, or the authorized agent for the Steward on whose behalf you are reporting
- You have read the program rules and/or uploaded your signed membership agreement
- The information and data in your report and any uploaded documents are complete and accurate
- You understand and agree that your company must retain supporting documentation for 5 years from the submission date, and that your report may be subject to audit

Membership agreement – For applicable programs, upload a completed .pdf of the membership agreement for your company or organization. Click the **Choose File** icon to search your computer for the document. After selecting the file from your hard drive or network, click the **Upload** icon.
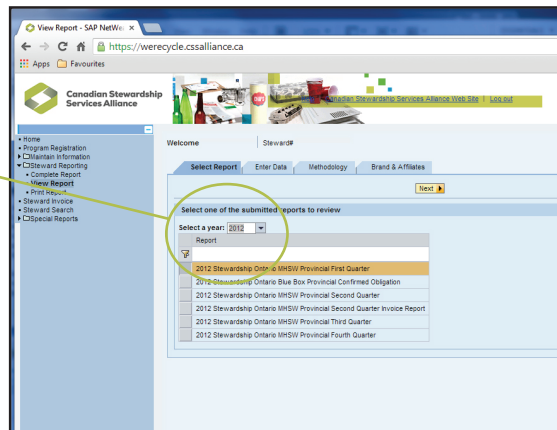
View or Print Reports

O nce data is submitted through the WeRecycle Registration and Reporting Portal (the Portal), you have the option to view or print the reports submitted in any year. A .pdf copy of a report can also be downloaded through the Print Report option.

View or print a report

View report

Select report – Choose an invoice year from the dropdown menu, or type a report name in the white search field and hit your keyboard's **Enter** key to narrow your search. Then click the name of the report to view. It will be highlighted in orange. Click the **Next** icon to continue.

The invoice year is the year in which invoices are generated, and it follows the reporting/obligation year. For example, a 2012 invoice year will reflect data reported in 2011 and identify materials supplied in 2010.


Print report

1 Select report – Review the list of available reports and click the name of the report you wish to view or download. The selected name will be highlighted. Click and drag the grey scroll bar to move up and down the list.

2 Review report status – The current status of each report is identified in the Report Status column. Submitted reports will be identified by fiscal quarter (i.e. Q1 RPT Submitted means the report for the first quarter has been submitted). Other options include Year Locked, Deficit Recovery, Q1 Transitional, and Annual True Up.

3 View report – Click the **View** icon next to the name of a report you wish to view with your internet browser.

4 Download report – Click the **Download** icon next to the name of the report you wish to save to as an Adobe .pdf.
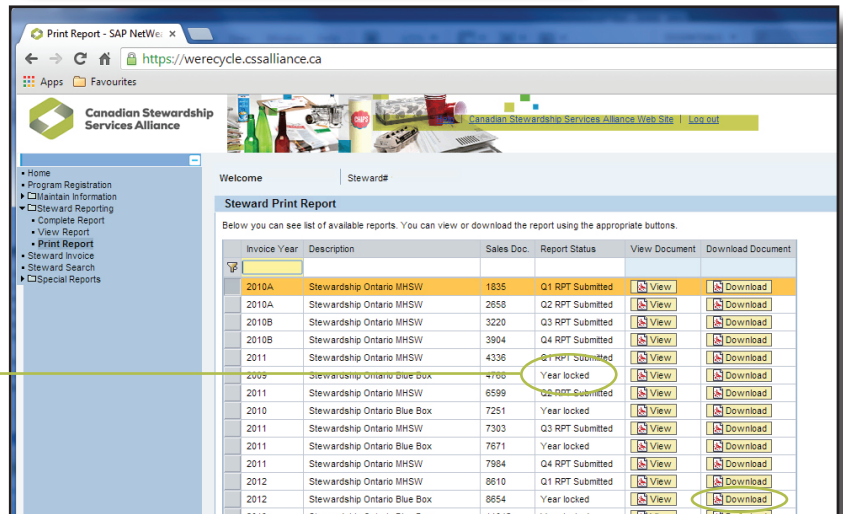
Reports can be filtered by categories including invoice year, description, sales document number, and report status. Enter a search query in the white cell at the top of any column to find matching results, and press **Enter**. Please note that any search queries will need to match the column's contents exactly. **To return to the full list, delete any search queries entered in the white cells and click the Filter icon**.

Steward Invoice

Steward invoices are published according to the timelines outlined in the Steward program rules or membership agreement and your billing preferences. All invoice amounts are in Canadian funds.

Review and pay invoices

1 **View invoice** – To review a published invoice, click the **View** icon in the same row as the Billing Document number.

2 **Review payment status** – Paid invoices will be marked with a green dot. Unpaid invoices will be marked with a red dot. A yellow dot indicates a payment is in process. A changing payment status will be updated within 72 hours.

3 **Pay invoice** – Invoices of $2,500 or less can be paid online through a secure online payment facility hosted by Moneris. Click the **Pay with Credit Card** icon to process the payment. Your payment status will be updated within 72 hours.


Definitions

Assignment – This is the invoice year. The invoice year is the year in which invoices are generated, and it follows the reporting/obligation year. For example, a 2012 assignment year will reflect your 2011 report containing 2010 data.

Billing Doc – An 8-digit invoice number unique to every invoice.

Originating Doc – A sales order number issued by Canadian Stewardship Services Alliance (CSSA).

✳ The list of invoices can be narrowed by typing an invoice year or program name in the white cell at the top of a column. Then press your keyboard's **Enter** key. Any search query must match the cell contents exactly. To return to a full list of invoices, delete any text entered in the white cell and press your keyboard's **Enter** key.

! For billing and Steward service inquiries, call 1-855-354-2772 or email Stewards@cssalliance.ca
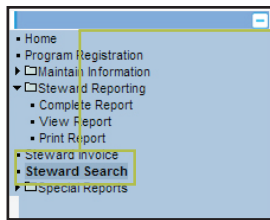
Search for registered Stewards

This search function displays Stewards who have registered on the WeRecycle Registration and Reporting Portal (the Portal). For a list of all members in good standing (who have reported and uploaded a signed, valid membership agreement) please refer to the Multi Material BC website: www.multimaterialbc.ca/stewards/registered-list.

There are 2 ways to search for a registered Steward.

1 **Search by program** – Use the dropdown menu in the Selection Criteria box to choose from the list of participating programs.

To view the selected list in your internet browser, click the **PDF Display** icon.
To save a copy of the selected list on your computer, click the **PDF Download** icon.

2 **Search by company name** – Type the Steward's name in the Name of Company text field. Define the maximum number of results you wish to view at a time in the Maximum Hits text field. Then click the **Search** icon.

Every result will include the name of the company, its registration date, and whether it registered voluntarily.

Canadian Stewardship
Services Alliance