Online Claims Portal Training for Service Partners

Ontario Paint Industry Stewardship Program

June 18, 2015
June 25, 2015

Product Care Association
Patrick Chauvet – Ontario Program Director
Cherith Sinasac – Program Coordinator
Holly Lafontaine – Program Coordinator
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Online Claims Portal - Agenda

- Welcome, Introductions, and Paint Program Overview
- Transition Overview
- Portal Overview
  - Portal Log in
  - Basic Navigation
  - Account Information
  - Submitting Claims
  - History and Status of your Submissions
- Live Run-Through of the Portal
- Questions
  We will stop for questions as we go through the presentation

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Online Claims Portal – Paint Program Overview

Product Care Association

- Is a Federal Non-profit Product Stewardship Association

- Started 20 years ago in British Columbia

- Develops, implements and manages 14 product stewardship program in 9 provinces, on behalf of industry

Online Claims Portal – Paint Program Overview

Paint: BC, SK, MB, NB, NS, NL, PEI, ON (June 30 2015)

Flammable liquids (including solvents), pesticides and other HHW products: BC, MB

Lighting: BC, MB, QC

Smoke and CO Alarms: BC

Small Appliances: BC, contracted by CESA

Major Appliances: BC, contracted by MARR

Outdoor Power Equipment: BC, contracted by OPEIC

Online Claims Portal – Transition Overview

Summary of Key Dates

- September 2013 PCA submitted their Industry Stewardship Plan to Waste Diversion Ontario (WDO)
- Extensive consultation and stakeholder engagement
- December 10, 2014 WDO approved the ISP, no sooner than June 1, 2015
- March 25 the effective date of the ISP was announced by WDO as June 30, 2015
- Service Partner Training Webinars June 18, and June 25
- End of day June 30, 2015 the Portal goes live

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Online Claims Portal – Transition Overview

Information Request by PCA from Service Providers

- Payment & Contact Information – spread sheet
  - (Can't issue a password for the claims portal)

- Submit EFT/Cheque form to PCA
  - (Can't pay Service Providers for claims submitted)

- Service Providers to submit and example of their Company BOL
  - Please assure your BOL has the required information for claims validation

- Regulatory Info, Audit Check List, Compliance Letter
  - To be completed by June 30th for Service Provider final approval

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Online Claims Portal

Questions

- To pose questions please type them into the "Chat" function located on the left side of your screen

Online Claims Portal – Overview

The PCA Claim Portal

- PCA's Service Partner Portal is a convenient web-based tool for entering claim submission reports related to the Paints and Coatings

- All Service Partners, including Municipalities, Transporters and Processor, will be interacting with the portal

- PCA requires a unique portal to communicate directly with the database and accounting systems for ease of data management and to facilitate payments

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Online Claims Portal – Overview

The PCA Claim Portal

- What are you claiming for;
  - Service Providers – Transportation for depot collected non commingled paint and R2R paint collected and Processors for processing services of paint from the Ontario paint ISP program
  - Municipalities – Depot collected commingled aerosols & event paints
- All Service Partners who have submitted their payment and contact information will be issued their user names and passwords for logging in
- *submit your information asap, if you haven't yet, to prevent delays in payment*

Online Claims Portal – Overview

What is this training all about?

- The training today will give you instruction, including a live presentation, to familiarize you with the portal functions

- Each of the two scheduled training sessions for Service Providers will review the same detailed instruction

- Affords you an opportunity to ask questions, but of course questions are welcome at any time!

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Online Claims Portal – Overview

Available Resources

- **Product Care Staff** are available to assist you with any challenges you may have during the transition

- A **training manual** for use of the portal is available for download from our website

- A **copy of this presentation** will also be available for download and reference from our website

- http://www.regeneration.ca/service-partner-support/ontario/

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Online Claims Portal

Questions

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Online Claims Portal – Basic Overview

High Level Overview of Portal Functions

- **Account Information**
  - Summarizes your companies' information including portal users and mailing address
- **Submitting a Claim**
  - Upload Spreadsheet or manual entry of claims into the portal allows for PCA staff to validate, verify and remit payment
- **History and Submission Status Tracking**
  - Maintains your submission history in a searchable and exportable format, and indicates your submission status as it moves from pending to approved to paid

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Online Claims Portal – Logging Into the Portal

www.regeneration.ca/service-partner-support/ontario/

Online Claims Portal – Basic Overview

Logging into the Claims Portal

Online Claims Portal – Basic Navigation

- Moving from page to page is done through the navigation header, only those pages available to you based on your role will be visible

- Account information will be available to administrators only, and Finance users will not be able to complete submissions

- To log out of the system, close your browser tab

Online Claims Portal – Account Information

Product Care Association
Ontario Service Partner Portal

ACCOUNT   SUBMISSIONS   HISTORY   CONTACT

COMPANY/MUNICIPAL INFORMATION

Name:	Hotz
Street:	239 Lottridge Street
City:	Hamilton
Province:	ON
Country:	Canada
Postal Code:	L8L 6W1

Main Phone: 905-545-2665
Other Phone:
Fax: 905-545-7822

REGISTERED PORTAL USERS

Name	Email	Role	Active
Roman Lowy	Roman.Lowy@fakemail.com	Administrator, Finance	⊘
Basil Nathan	Basil.Nathan@fakemail.com	Data Entry	⊘

LOCATIONS

Name

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Online Claims Portal – Account Information

- The Account Page is available to Administrative level users only

- It provides the user with a quick reference to all of their company contact information

- A list of registered users for your company and level of access

Online Claims Portal – Account Information

- Information is not directly editable, contact PCA to make changes, examples include:
    - Change to Contacts or roles
    - Adding an additional contact

- Contacts listed for security and privacy

- Future changes on the account information page to include an updating feature

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Online Claims Portal

Questions

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Online Claims Portal – Submissions

Online Claims Portal – Submissions

- The core function of PCA's Service Partner Portal is the reporting of collection and post collection activities to PCA

- Who reports - Municipalities, Transporters and Processors

  - **Municipalities**

    - Depot commingled aerosols

    - Paint, including aerosols collected at events

  - **Transporters** – Paint collected from municipal depots and retail/commercial locations

  - **Processors** – Paint processed from all PCA paint collection sites

Online Claims Portal – Submissions

The submission page is where you will upload or directly enter your claims data, and this functionality will be available to Administrative and Data Entry portal users.

- Some vernacular:

  - Each **submission** will have one, or multiple claim lines on it.

  - A **claim** is a line within the submission, providing the details of the service for one site or event.

  - **Shipping documents** are electronic copies of the paper forms provided to you by the service providers, supporting your claims.

Online Claims Portal – Submissions

Submission Title, Excel File Location and Upload

- The submission will be given a title by the user, and will be assigned a number by PCA once submitted.

- Remaining consistent with title and names for each submissions will help with organization (Ex. Submission title could state ABC Co. depot June 18 2015)

- The most up to date excel Upload Spreadsheet is available for download directly from the portal
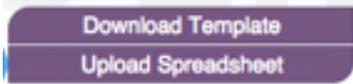
- Reminder to save your spreadsheets in the same location each time for quick reference

- You can also reuse a spreadsheet to save time on data entry by revising it, renaming it and uploading it to the portal

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Online Claims Portal – Submissions

Attaching Supporting Documentation to your Submission

- In order for your submission to be validated by PCA staff, supporting documents must accompany each claim submitted
- Easily attach them to the submission through the portal, and review them in the future if necessary
- If your submission is missing the necessary supporting documents approval of the claim will be delayed
- To make review of the documents easier, please note the document number in the file name
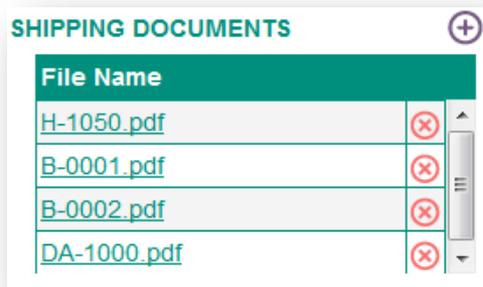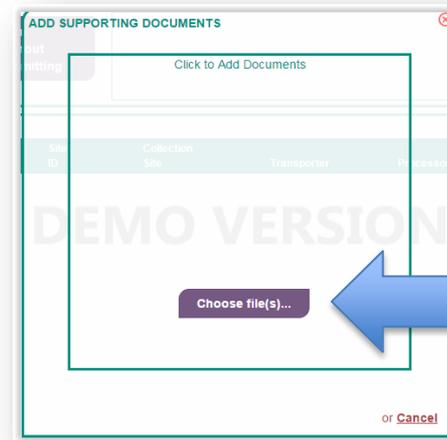
Online Claims Portal – Submissions

A Word on Supporting Documentation

- Product Care will accept Service Provider's BOLs and Manifests to validate claims. PCA has been working with Service Providers to assure their BOLs contain the following information, required for validating a claim;

  - ✓ Name of Generator
  - ✓ Transporter's Name
  - ✓ Processors Name
  - ✓ Document Number
  - ✓ Material Category

  - ✓ Container Type
  - ✓ Quantity of Containers
  - ✓ Net Weight
  - ✓ Unit of Measure

Online Claims Portal – Submissions

Features of the Claims Area

- To enter a claim manually, click on the **plus sign** ⊕ at the top right of the Claims area.
- You may add a claim line to an un-submitted submission at any time, including after uploading a spreadsheet into the portal

- To copy the claim line and revise just a few details, you can click on the **Copy** ⧉ button and a duplicate line will appear below
- To remove a line from the Claim area, click on the Red ⊗ to the right of the line you want to delete.

Online Claims Portal – Submissions

Upload Spreadsheet Introduction

- Must enable Macros within your Excel in order for the spreadsheet to operate properly
- Can copy and paste, use drop down lists, or press CTRL-F (for dates, Sites and Service Providers)

	A	B	C	D	E	F	G	I	K	L	M	N	O	P
1	Product Care		Product Care Association				Legend: Blank Row						Version: #.#	
2			Ontario Service Partner Claims Spreadsheet				Finished Row / Required Field							
3	Program	Service type	Document No.	Pickup Date DDMMYYYY	Delivery Date DDMMYYYY	Site ID	Collection Site	Transporter	Processor	Material Category	Shipping Container	Qty	Weight (kg)	Unit
4	Ontario Paint	Commingled Materials	B-1014	02062015	04062015	1160	Depot - Oshawa Waste Disposal Site	Buckham	Veolia	Aerosols	205L Drum	7	358	Kg
5	Ontario Paint	Commingled Materials	B-1015	04062015	04062015	1175	Depot - Pickering Waste Disposal Site	Buckham	Veolia	Aerosols	205L Drum	6	305	Kg
6	Ontario Paint	Commingled Materials	B-1016	02062015	06062015	1170	Depot - Brock Waste Disposal Site	Buckham	Veolia	Aerosols	205L Drum	8	417	Kg

- Save the file on your server for reference, and rename to something relevant to you
- No restrictions on naming convention

Online Claims Portal – Submissions

Manual Entry versus Spreadsheet Upload of Claims Data

- All of the <u>same fields</u> in the excel spreadsheet are also in the portal
- All of the drop down lists and <u>searchable menus</u> are the same in the portal, as in the excel template
- Once a submission is sent to PCA for validation, it is then <u>exportable to Excel</u> from the history page for your records
- The portal has some simple <u>validations</u> built in which will check to see if your weights seem unusual, if you are missing data, or if you have entered the dates incorrectly. If you use the spreadsheet, these will appear after you upload to the portal.

	Program	Service Type	Document No.	Pickup Date	Delivery Date	Site ID	Collection Site	Transporter	Processor	Material Category	Container Type	Qty	Weight (kg)	Unit	
	Ontario Paint	Event Co	DA-1003	Apr 7 2015	Apr 15 2015	1180	Event - Lake...	Drain-All	Drain-All	Aerosols	205L Dr	8	417	Kg	
	Ontario Paint	Event Co	DA-1004	Apr 11 2015	Apr 10 2015	1185	Event - Clar...	Drain-All	Drain-All	Aerosols	205L Dr	6	417	Kg	

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Online Claims Portal – Submissions

Data Entry Tips

- Both the spreadsheet and the portal have searchable site names, by pressing the SPACE bar or RETURN key in the portal, or CTRL-F in the spreadsheet
- The pop-up will search for the word that you type anywhere in the string of words

- You can also select from the drop down list, or type in the Site ID
- Lists are available for most fields, or a calendar for the date fields
- Must input a valid entry to all fields

Online Claims Portal – Submissions

Saving Your Submission for Later

- If you want to go into the portal and enter your data periodically you can save your submission and come back to it later
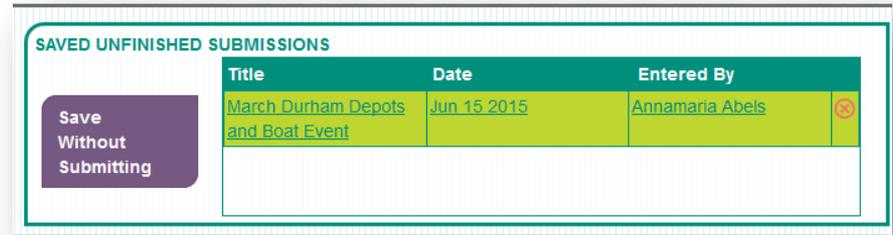
- Saved submissions are visible to other portal users within your organization
- Once a submission is sent to PCA (submitted) it is removed from the 'Saved Unfinished Submissions' area
- Supporting documents that have been uploaded are also saved with the submission

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Online Claims Portal

Questions

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Online Claims Portal – History

- The History page is where all of your submissions will be stored and can be searched for reference

- They can be exported to Excel or generated into a PDF file

Online Claims Portal – History

Features

- Using the advanced search feature you can search by many of the same fields found in the submission to find a particular one
- When the submission is clicked on, the header and claim details populate in the rest of the page
- The submission status is also tracked and updated as it is approved or rejected by PCA, and when the submission is paid
- Status includes
  - Pending
  - Rejected
  - Approved
  - Paid
  - Reversed

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Online Claims Portal – History

Status Changes and Notifications

- Supporting documents that you attach at the time of submitting are stored with the submission for reference

- When a submission is approved, the amount to be reimbursed will display from within the portal

- After you send your submission to PCA for review you will receive an email and pdf with the submission detailed.

Online Claims Portal – History

Status Changes and Notifications

- When your submission is approved by PCA, you will also be emailed with an additional pdf showing the amounts to be paid

- HST and the Fuel Surcharge (if applicable) will display as separate line items on the PDF or excel file

- The final email you will receive is confirming when your submission has been paid

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Online Claims Portal

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Online Claims Portal – Live Presentation

Online Claims Portal – Questions

Asked and Answered

- **How often can I submit a claim to PCA for payment?**
  - ✓ As often as you like, we recommend 1-4 times a month
- **How quickly after my materials are shipped must I make my claim?**
  - ✓ We ask that you submit your claim within 30 days of service
- **How long after I submit until I get paid by PCA?**
  - ✓ Assuming you have accurately completed your submission, and provided all the required supporting documentation, then PCA will aim to review your submission within **3-5 business days**, and will pay 30 days after the submission has been approved

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Online Claims Portal – Questions

Asked and Answered

- **How will I get Paid?**
  - ✓ Payment method is based on your chosen selection when the EFT/Cheque form was submitted

- **How will I get paid for Comingled Aerosols?**
  - ✓ Municipalities will continue to be responsible to pay Service providers for any services rendered in regards to comingled aerosols.

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Online Claims Portal – PCA Contacts

- ## *Training and Claims Questions*

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  416.775.1907

  Patrick Chauvet
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  1.877.592.2972 x356
  416.307.2886

- ## *Portal & System Questions*

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  778.331.1003

- ## *Finance Questions*

  - apayaccounting@productcare.org

Thank you!

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