Product Care Association Ontario Service Partner Portal

User Guidance Manual

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Program Overview

Product Care Association of Canada (PCA) is a federally incorporated, not-for-profit organization that creates, implements and leads successful waste diversion programs across Canada and in the United States. Product Care has been in the business of paint recycling programs since 1994 when the first extended producer responsibility regulation for paint in Canada was passed in British Columbia. For over 20 years now we have been responsibly managing regulated materials, and have continued to expand our roster of accepted materials on behalf of our stewards as new Extended Producer Responsibility (EPR) regulations come into force.

Waste Diversion Ontario (WDO) approved both the Paints and Coatings Industry Stewardship Plan (ISP) and the Pesticide, Solvent and Fertilizer (PSF) ISP with effective dates of June 30, 2015 and April 1, 2016 respectively. The final ISP plans are available for review by following the links: Paint ISP and PSF ISP.

Product Care will be responsible for the ISP material supply chain including Service Partner claims. We have designed and developed our own online portal for the tracking and management of the collection, transportation and processing of paints and coatings, including commingled aerosols as well as pesticides, solvents and fertilizers.

Portal Overview

Product Care's Service Partner Portal is a convenient web-based tool for entering claim submission reports related to ISP materials. Currently paints and coatings as well as commingled aerosols, pesticides, solvents and fertilizers are the product categories that PCA is managing through this portal, and only for products collected in Ontario. If PCA begins managing additional products in Ontario in the future, then it is anticipated that PCA would continue to use this portal to manage and report on those product categories.

There are 3 key elements to the reporting portal interface:

Account - Information	Submissions - Claim	History - Submission Status Tracking
Summarizes your companies' information including portal users and mailing address.	Upload Spreadsheet or manual entry of claims into the portal enables PCA staff to validate, verify and remit payment.	Maintains your submission history in a searchable and exportable format, and indicates your submission status (e.g. pending, approved, rejected, paid.)

Getting to the Login Page

①   If you have been approved as a transporter or processor within our service network, or if you are a participating Municipality with a collection site or event then you will be using this portal.

The portal can be accessed through our Service Partner Support Webpage at:
www.productcare.org/service-partner-support/ontario/

OR

Create a bookmark directly to the online portal at:
https://servicepartners.ca/#/login

Logging Into the Portal
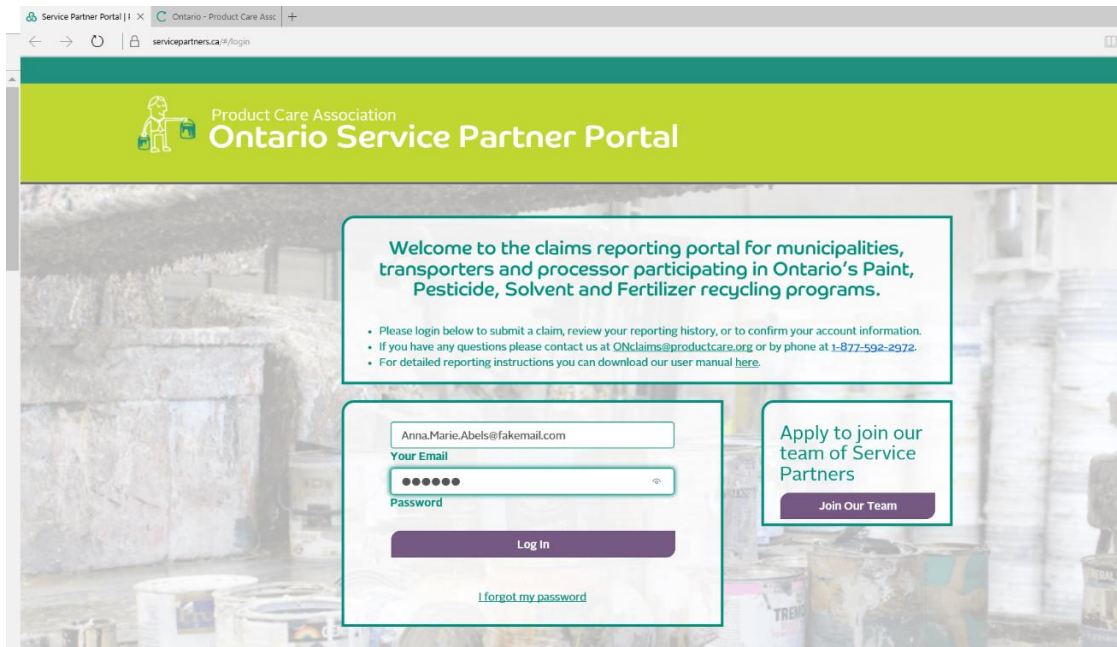
If You Have an Account

If you have an account, use your email and the password provided to you to login. The **Log In** button will not become active unless a valid email address is entered and until both fields have been completed.

> If you have not received your password then you can contact the Product Care team for assistance at ONClaims@productcare.org

You Do Not Have an Account

If your company is an approved service partner with PCA but you are not yet set up as a contact within the portal then please contact our staff directly at ONClaims@productcare.org or 1-877-592-2972 ext. 361.

If your company does not already have an account then you will first need to review our requirements for becoming a collector, transporter or processor. Click on the **Join Our Team** button to be directed to our website for additional information.

Forgot or Change Password

If you cannot remember your password, click on the **I forgot my password** link. You will be prompted to enter your email and if there is an existing account, an email containing a link instructing you to reset your password will be sent to that email address. Click on the link and follow the steps.

User Level Access

Once logged in, you will have access to various parts of the portal based on the feedback you provided during the account set up. If your access needs to be updated, please have your company's Administrator contact our staff. The pages that will be available to the different users of the system are as follows:

Admin: *Account, Submissions, History and Contact*
Data Entry: *Submissions, History and Contact*
Finance: *History and Contact*

Screen Navigation
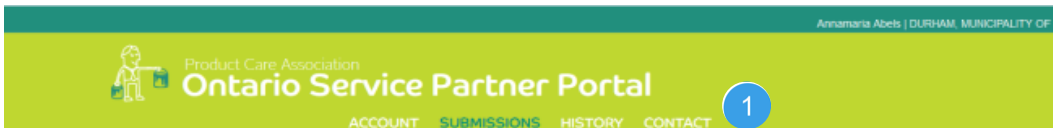
To navigate from page to page simply use your cursor and click on any one of the following selections as shown above.

> *Account*
> *Submissions*
> *History*
> *Contact*

General Tips for Portal Use

- The portal has a navigation bar at the top which allows you to navigate between pages. Portal users will only be able to view various parts of the portal based on their level of access.

- **Your data will be lost if you close your browser before saving your submission.** You must save and name your submission for the data to be available in the '*Saved Unfinished Submissions*' area when you return to the portal.

- The portal is designed to function with the latest versions of the most commonly used web browsers.

- The portal user's name and company will appear in the top right corner of the portal to indicate which user is logged in.

- The Collection Site, Transporter and Processor and their associated ID's must be valid entries selected from the lists or menus. The portal does not check that the site you have selected is a valid site for your company or municipality. This will occur later on through the claims review process and the selection of invalid entries will delay your payment so be diligent in your data entry.

- Just close the browser tab to log out of the portal. There is no logout button.

The Account Page

The Account Page is available to Administrative level users only and provides the user with a quick reference to all of their company or Municipal contact information, a list of registered users for your company or Municipality, and for Municipalities a list of association collection sites and events. Currently, this information cannot be changed by any user.

Note: Transporters and Processors will not see the collection sites that they service listed here, only Municipalities will see their collection sites listed.

If any of the information on the Account Page appears incorrectly or requires updating please contact our PCA staff at **ONClaims@productcare.org** or 1-877-592-2972 ext. 361.

Examples include:

- An employee starting at, or leaving, your company or Municipality;
- A change in the role of your employee;
- A change of address or phone number for a contact, or for your place of business; or
- If you are a Municipality and need to add a Municipal collection site or event to the approved collection site list.

Submission Page

The core function of the PCA Service Partner Portal is the reporting of collection data to PCA from Municipalities, Transporters and Processors as a means of tracking the movement of materials, managing payments and to compile and analyze the data for regulatory commitments. 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.

Submission Page Features

Here is a high level overview of the main features of the submission page:

Submission Title

1. Each submission must be given a title, or name. This is a free form field that will be set by you and will aid you in associating the submission contents with a place or time (e.g. "All Event and Depot Claims July 2015").

Download Template / Upload Spreadsheet Function

2 A blank spreadsheet template is available to all Service Partners and can be downloaded by clicking the **Download Template** button. You will be asked to save the excel file to your computer in a location where you can easily find it to upload into the online portal, after the claims information has been entered.

The **Upload Spreadsheet** function allows users to upload the populated spreadsheet template into the **Claims** area of the submission screen.

Claim Detail Area

3 Once your data has successfully uploaded from the spreadsheet to the portal, it will automatically fill in the claims data for each claim line. You may also choose to manually enter your claims data here.

Highlighted Cells

4 Some of the data fields have validations that the system will check. It will check for dates, and weights that seem unusual, or incorrect combinations of materials and containers.

Attaching Supporting Documents

5 Here is where you will attach your supporting documents such as copies of bills of lading, shipping manifests, invoices, etc. It is anticipated that most files will be in a PDF file format (.pdf), but many other file formats are supported for upload. Once all files are selected they will be automatically uploaded.

Adding a Claim Line

6 You can manually add a claim line when starting a new claim or you may add a claim line to an existing claim. To enter a claim manually, click on the ⊕ icon at the top right of the **Claims** area. A new line will appear and you can tab through each field to complete the form.

Copy a Claim Line

7 If you are entering a claim that has information largely the same as another claim line above, you can click on the **Copy** 🗗 button and then adjust the information on that entry as required.

Removing a Claim Line

8 To remove a line from the Claim area, click on the ⊗ icon to the right of the line you want to delete.

Saving without Submitting

9   You may want to enter your submission data periodically, and return to it at a later date or time to submit. Use the **Save without Submitting** button to save your data. You can return to a submission at a later time by clicking on the submission name and the claims information will populate below.
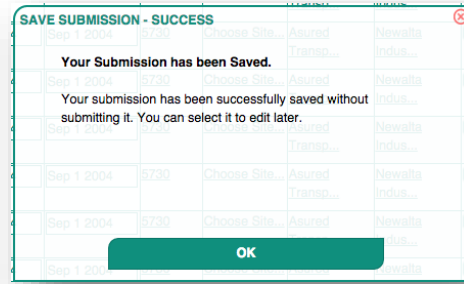
Any submission that you save will be stored according to your company or municipality so if another user within your company needs to complete the submission, the saved submission will be available for that user as well.

Submitting a Claim

10   To successfully submit a claim, you need to have entered all of the correct information completely then click on the **Submit Claims** button.

When it submits successfully, the claim lines will be cleared and a pop-up message will appear notifying you that your submission was submitted successfully.

However, if there are any errors in the claim data caught by the system, there will be an error message pop-up and your claims will remain populated in the claims area to await any further updates and resubmission. The cells with errors that require your attention before you can attempt to resubmit a submission will be highlighted in red.

Table 1: Claim Data Fields	
Service Type	Transportation; Processing; Commingled Materials; Event Collection; ReUse
Shipping Document Number	Free form field (Bill of Lading Number/Shipping Manifest Number, Invoice, etc.) For ReUse claims only: this field will auto populate to "Not Applicable."
Pickup Date	The date that the materials were picked up from the collection site For ReUse claims only: this field will be the first day of the month that the ReUse claim is for

Delivery Date	The date that the materials were delivered to the processor For ReUse claims only: this field will be the last day of the month that the ReUse claim is for
Collection Site	Collection Site name is the location where the materials were collected.
Transporter	The company who picked up the materials from the collection site. For ReUse claims only: this field will auto populate to "ReUse"
Processor	The company who received the materials for proper end of life management. For ReUse claims only: this field will auto populate to "ReUse"
Material Category	Paints & Coatings; Aerosols; Pesticides; Misc. Organics; Fertilizers
Container Type	Gaylord Box; 205L Drum; 20L Pail; Paint Can (for ReUse claims only)
Quantity	Number of containers shipped. This must be a positive whole number in order to validate the claim. For ReUse claims only: this field will be the number of eligible paint containers reused in the month
Weight (kg)	Weight of material shipped. This must be a positive whole number in order to validate the claim. For ReUse claims only: this field will be the weight of eligible paint and coatings reused in the month
Unit	Kilograms (kg)

How to Submit a Claim

After you have logged into the Service Partner Portal and are ready to populate a submission with claim lines, you have two different ways that you can get data into the portal:

- *Using the Upload Spreadsheet; or*
- *Manual entry into the portal fields online.*

The following pages will describe how to submit claims using either method.

Using the Upload Spreadsheet

1. Once you have the spreadsheet downloaded and open on your computer you must ensure that your macros are enabled within Excel to allow you, the user, to enter claim information in the spreadsheet.

2. Select from the drop down menu the **Service Type** you are claiming for.
Note: You cannot claim for transportation and processing on the same claim line, you must have a separate claim line for each type of service.

3. Input the document number of the supporting shipping document associated with this claim line. Enter the BOL number or manifest number. This value can be repeated on multiple claim lines if you moved materials on the same shipping document.

4. Enter the dates that the materials were picked up and delivered in columns D and E. The date format in the spreadsheet is DDMMYYYY. The restrictions for these cells appear as a pop up beneath the cell. It cannot be in the future but can be today, and it must not be greater than one year old. The **Pickup Date** and **Delivery Date** can be the same date.

5. The **Collection Site** can be populated by pressing ***Ctrl F*** to have a search menu appear from this field, or you can select from the drop down list.

6. The **Transporter** and **Processor** fields (columns I and K) have much shorter lists, and offer both a drop down list to select from, or the option to press ***Ctrl F*** to have a search menu appear.

7. The **Material Category**, **Shipping Container** and **Unit** fields also have drop down lists to select from. Once you have selected 'Paints & Coatings' for example, you can just type 'p' in the subsequent rows and 'Paints & Coatings' will auto populate.

8. The **Weight** and **Quantity** fields should be entered as provided in the shipping documents supporting your claim. The weight must be the *actual net weights* of the contents, excluding the weight of the shipping containers or pallets. The weight and quantity must be positive whole numbers.

9. Once all of your claim data is entered into your upload spreadsheet you can save it and upload it to the portal using the **Upload Spreadsheet** button.

Note: Only one (1) spreadsheet at a time may be uploaded. Uploading another spreadsheet will over-write your data.

Note: The Upload Spreadsheet has the same fields, drop down menus and search features as the online portal. All of these fields are described above in Table 1.

Once the file is uploaded, the **Claims** area of the screen will be populated with the data from the file.
- If the template does not match the portal's expected format (fields need to be in the right order), an error message is generated and the upload fails.
- It is important to note that changes made to the claims in the portal <u>after they have been uploaded</u> will NOT be reflected in the spreadsheet that was uploaded originally. The changes are made within the system, not in the uploaded spreadsheet.
- The **submitted** version of the information is considered the official version.

Note: The upload does NOT mean that the Submission was submitted. You must then click on the **Submit Claims** button in the online portal at the bottom of the **Submissions** page.

Manual Claim Entry

If you elect to enter the data directly into the portal, you may do so and not use the excel upload spreadsheet. The portal has all the same fields, drop down menus and search features as the upload spreadsheet. All of these fields are described above in Table 1.

The steps for entering your data are almost exactly the same as described above for using the spreadsheet. The differences are highlighted below:
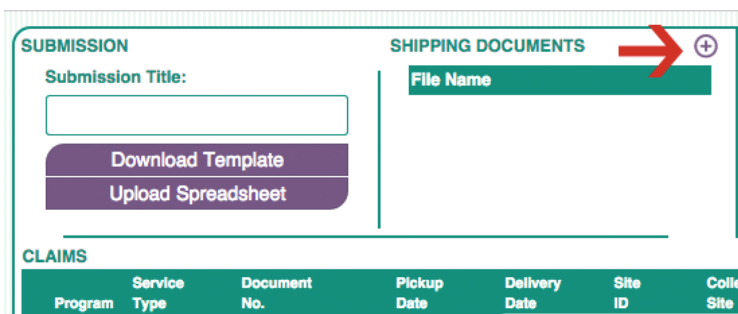
1. Using your mouse click on the ⊕ icon located on the right side of the screen. This will add a line for inputting the first claim line. If more claim lines are required, click the ⊕ icon each time to add a new line.

2. If you are entering a claim that has information largely the same as another claim line above, you can click on the **Copy** ⧉ button and then adjust the information on that entry as required.

3. Fill-in each cell on the claim line using the drop down menus provided.

4. Select the Pickup and Delivery dates using the calendars provided in the drop-down function.

5. To see the search function for the Collection Site, Transporter and Processor, press the **_SPACE_** button or **_ENTER_** button on your keyboard, or click on the word "**Choose…**" using your mouse.

Name your Submission

In the portal, on the submissions page, type in a **Submission Title**

Adding Supporting Documentation

In order for your submission to be validated by PCA staff, supporting documents must accompany every claim submitted. To make the review of your submission more efficient, it is a best practice to label documents in a manner that easily links each document to the associated claim lines under review (e.g. document number, date the service was provided, and/or collection site name referenced in the related claim lines). The approval of your claim will be delayed if your submission is missing the necessary supporting documents. To add a shipping document, click on the ⊕ icon.

A pop-up window will be displayed, asking you to choose the file to upload.
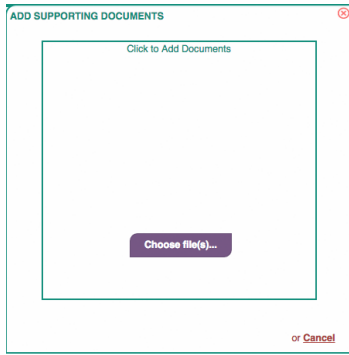
- Click on the **Choose Files** button. You may then browse your computer to find the supporting document(s) you wish to attach to the submission.

- Select the shipping document(s) you wish to upload to the online portal and click on the open button. This action will upload and automatically save the selected file(s) into the claims portal. You can also select and upload multiple documents at the same time.

Submitting the Claim

- Once you have reviewed all the information on the **Submission** page and there are no "errors" (i.e. no cells highlighted in red) then you may submit your claim.

- Click on the **Submit Claims** button at the bottom of the page. The claims will disappear and a pop-up window will let you know that it was successfully sent to PCA.
- You will then be able to review your submitted claim on the **History** page and track the status of your claim.

Paint Reuse Reporting

Any municipality participating in the Paint Reuse (PR) program will report their monthly PR claims through the portal by entering data directly in the portal or by using the upload spreadsheet just like any other claim. For guidance on completing Paint Reuse claim lines, please review Table 1: Claim Data Fields above.

Paint Reuse Supporting Documentation

A municipality must submit both:

1. the on-site tracking information which accurately tracks the amount of eligible paints and coatings that have been reused in the month that the claim is being made for (this may be in kilograms or containers based on the municipalities' operation and tracking method), and

2. the PR Reporting Form which summarizes the PR claim information and assists the municipality in converting their on-site PR tracking data into the information required for the PCA portal claim.

Paint Reuse Reporting Form

The **PR Reporting Form** must be **completed, saved as a pdf and attached** to any submission that contains PR claim lines.

As shown below, the PR Reporting Form summarizes the PR data tracked at a site for a given month. If a municipality provides PR services at more than one depot in a month, then the municipality must complete one form for all depots. The municipality may input the number of eligible paint containers or kilograms reused at a depot in a month and the reporting form will automatically calculate the corresponding kilograms or containers respectively.

Once the PR Reporting Form is complete, the municipality must then enter the container quantities and kilograms on the PR Reporting Form into the corresponding portal claim line(s). This documentation must be accurate and support each claim line in the portal.

The municipality **must save the PR Reporting Form as a pdf** and attach the form to the submission in the online portal using the same steps as described in the **Adding Supporting Documentation** under the **How to Submit a Claim** section in this guide.

The PR Reporting Form can be downloaded here:
http://www.productcare.org/wp-content/uploads/2017/03/Paint-Reuse-Monthly-Reporting-Form.xlsx

	A	B	C	D	E	F
B17						
1	MONTHLY PAINT REUSE REPORTING FORM					
2						
3	Complete this form by entering the monthly totals of eligible reused quantities which were reused in the reporting month at each of your participating HHW depots. If you track containers reused at your depot then this form will automatically determine the kilograms that you report in the portal If you track kilograms reused at your depot then this form will automatically determine the containers that you report in the portal Note: you must report both the container quantities and kilograms in the portal just like any other claim made to PCA. This form as well as supporting PR documentation must be attached to your submission.					
4	INPUT	INPUT	INPUT	SELECT	AUTOMATIC	AUTOMATIC
5	MONTH	COLLECTION SITE	QUANTITY OF ELIGIBLE PAINTS & COATINGS REUSED	UNITS	CONVERTED QUANTITY	UNITS
6	November	HHW Depot Name 1	50	Containers	287	Kgs
7	November	HHW Depot Name 2	100	Containers	575	Kgs
8	November	HHW Depot Name 3	1000	Kgs	174	Containers
9						
10						
11						
12						
13						
14						
15						
16						

Paint Reuse Reporting Form

Below is an example of the PR claim lines that would correspond to the PR Reporting Form example above. Municipalities may submit PR claim lines with other claims made for other material services which took place in the same month.

Note that for PR claims the Pickup Date is the first of the month and the Delivery Date is the last day of the month.

History Page

The History page is where you will be able to review your previous submissions and check the status of those submissions. When you arrive on the History page, the last ten submissions your company or municipality completed are automatically listed in the **Submission List** area to the left. Just click on the submission to open it and the details will populate the other sections of the screen under **Submission Details** and **Claims**.

You can search for previous submissions by title, document number or date directly from the search box in the **Submission List** area.

The history page has three main areas:

1 Submission List;

2 Submission Details; and

3 Claim Details.

Submission List

This section of the window, the top left corner, is where you will find the most recent claim submissions or you may do a quick search by entering the submission title, submission number, or the date that the submission was submitted to retrieve all the relevant submission entries to review.

You may select one of the claims listed by clicking on the submission. Once selected, the submission information will appear in the **Submission Details** and **Claims** portion of the screen.

This portion of the screen shows the following fields;

- **Title, No. Date -** Enter part of the submission title, the submission number or the date that the submission was sent to retrieve the applicable submissions
- **Sub No. -** Submission number assigned by PCA
- **Title -** Free form description of the submission, as provided by the user
- **Date -** The date that the submission was sent to PCA
- **Status –** Status of the Submission [pending; approved; paid; rejected; reversed]
- **Amount -** The value of the submission

Advanced Search Function

For more precise searching capabilities, click on the **Advanced Search** button. A window will pop-up and you can enter information into any of the fields on this page and click on **Search** to retrieve the submission(s) that matches the search criteria.

You are not required to select more than one search criteria, but you can increasingly narrow your search results by choosing to include more fields in your search criteria.

After you click **Search** the window will close and the list of submissions that appears in the **Submission List** will reflect your search results. Click on any submission to open the details in the window.

The advanced search pop-up window will show the fields below;

- **Submission Title** - Submission Title
- **Submission Number** - Submission Number – a fixed value assigned by the portal
- **Pickup Date Range** - Pickup Date Range
- **Delivery Date Range** - Delivery Date Range
- **Status** - Pending; approved; paid; rejected; reversed
- **Collection Site Name** - Collection Site Name
- **Service Type** - Type of Service [Processing; Transportation; Commingled Materials; Event Collection; ReUse]
- **Shipping Number -** Shipping Document Number from your BOL or other supporting documents such as a movement manifest.
- **Material Category -** Material Category [Paints & Coatings; Aerosols; Pesticides; Misc. Organics; Fertilizers]

Submission Details

Once a submission is selected, the high level details of the submission appear in the top right area of the window. Any submission that is prepared by your company or municipality, and completed by any user within your organization, will be available to you.

These are the fields that are retrieved from a search;

- **Sub No.** - Submission number
- **Submission Title -** The title provided by the user at time of submission
- **Date -** Date submitted
- **Submitted By –** The name of the portal user who submitted the claim
- **Status –** Pending, Approved, Rejected, Paid, Reversed
- **Amount** - Expected payment amount
- **Shipping Documents** -Associated shipping documents (Bill of Lading, Shipping Manifest)

You may also perform the following actions
- **Print Submission –** Print a copy of the current submission being displayed
- **Save Submission as PDF –** Save the submission as a PDF file
- **Export Submission as Excel –** Exports the submission into an excel worksheet

Claim Details

The claims details of the selected submission will appear in the section of the screen below the **Submission List** and **Submission Details** area. *It is important to note that the Claims details on the History page cannot be changed as they have already been submitted to PCA*. The fields are the same as in the Submission page, with the exception of the Amount field. This will populate once the value of the claim line has been determined and the submission has been approved by PCA. Otherwise it will appear as $0.00 while the submission is still pending approval.

Contact Page

This page provides you with the contact information of the Product Care staff members that can assist you with any support or answer any questions that you may have. Please do not hesitate to contact us at any time.

Common Data Entry Errors

A Claim Will Not Successfully Submit if:

- Any of the fields are missing when the **Submit** button is clicked. The field will be highlighted red and the submission will not proceed.
- The weight or quantity fields are a negative number.
- The weight or quantity fields are not a whole number.
- The date fields are in the future, or if the delivery date is earlier than the pickup date.
- The delivery date or the pickup date is more than one year old.

Your spreadsheet should not be altered from its original format, with the exception of entering data and renaming the file. Any attempts to override the functionality will result in an inability to upload the spreadsheet into the portal.

Reporting and Payment Timelines

The frequency that you report will determine the frequency in which payment is issued. Product Care recommends that you report at least once a month, and would prefer every two weeks for those with higher volumes of services to claim.

Once a submission is sent to PCA for review and approval, we will strive to have your submission reviewed within 3-5 business days and would have either approved your submission or contacted you to discuss any question(s) that we may have about your claim.

When a submission is approved it will be pushed to the accounts payable department. The payment method is based on your chosen selection when your company or municipality submitted the EFT/Cheque form to Product Care. The submission will be paid within 30 days after approval.

How to Read Your Remittance Notice

Submission Remittance Notice

REMITTANCE ADVICE

Product Care

Date of payment

Remittance Advice Number:

Settlement Date:

Page:

To:

Deposit Amount: ◄— Total including HST

Deposited In:
Bank Transit No: ◄— Banking information
Bank Account No:

Document Type	Document No.	Document Date	Amount Due	Discount Taken	Amount Paid
Invoice	ONP-10242	9/18/2015	13,249.51		13,249.51
Invoice	ONP-10243	9/18/2015	25,808.92		25,808.92

This "ONP" number refers to a submission number. This number was assigned to your submission in the reporting portal when the claims were submitted. To see more details on what you were paid, log-in to the portal and download the PDF summary of your approved submission.

This is the amount you are receiving payment for which includes HST.

Depot Hour Remittance

Product Care

ONTARIO PaintRecycle PROGRAM
MUNICIPAL DEPOT PAYMENT
November 2015 Payment

Month and Year the payment is for.

PAYABLE TO: Municipality Name
ATTENTION TO: Municipal Contact
VENDOR No.: PCA's assigned Identification

PAYABLE BY: On or after December 31, 2015

Payment Terms

Total Annual Reimbursable Hours: Annual_Hours
Hourly Rate for Paints and Coatings: $Hourly_Rate
Number of Payments Annually: No_Payments

SUB-TOTAL for this Month: Subtotal
HST AMOUNT: $HST
TOTAL with HST: **$Total**

This is the monthly amount you are receiving payment for which includes HST.