Online Claims Portal Training for Municipal Partners

Ontario Paint Industry Stewardship Program
June 17, 2015, June 24, 2015 & July 8, 2015

Product Care Association
Patrick Chauvet – Ontario Program Director
Cherith Sinasac – Program Coordinator
Holly Lafontaine – Program Coordinator
Sarah Willie – Manager, Technical Services
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*
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
- Municipal Training Webinars June 17, 24 and July 8
- June 30, 2015 Portal goes live
Online Claims Portal – Transition Overview

Information Request by PCA from Municipalities

• Contact & Service Information – complete the survey
  • (Can’t issue a password for the claims portal)

• Submit EFT/Cheque form to PCA
  • (Can’t pay municipalities for claims submitted)

• Municipalities to submit their commingled aerosol lab pack pricing to PCA
  • latest invoice from service provider
  • SO purchase order
    • (Municipalities cannot submit claims for commingled materials)
Online Claims Portal – Transition Overview

*Information Request by PCA from Municipalities*

- Signed PCA-Municipal ISP Materials Service Agreement back to PCA on or before June 30, 2015
- Municipalities to submit to PCA as soon as possible, events that were not previously submitted to SO by March 30
- Certificate of Insurance to PCA on or before June 30
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 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.
Online Claims Portal – Overview

The PCA Claim Portal

• What are you claiming for;
  • Municipalities – Depot collected commingled aerosols & event collected paint (including aerosols)
  • Service Providers – Transportation for depot collected non commingled paint and R2R collected paint and Processors for processing services of paint from the Ontario paint ISP program
• All Service Partners who have completed the survey and provided updated information will be issued their user names and passwords for logging in
• Update 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 three scheduled training sessions for Municipalities will provide the same detailed instruction

• Affords you an opportunity to ask questions, but of course questions are welcome at any time!
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/](http://www.regeneration.ca/service-partner-support/ontario/)
Online Claims Portal

Questions

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Online Claims Portal – Basic Overview

High Level Overview of Portal Functions

• Account Information
  • Summarizes your Municipalities' information including approved Depots and Events, 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
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

### COMPANY/MUNICIPAL INFORMATION

<table>
<thead>
<tr>
<th>Name</th>
<th>DURHAM, MUNICIPALITY OF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Street</td>
<td>605 Rossland Road East</td>
</tr>
<tr>
<td>City</td>
<td>Whitby</td>
</tr>
<tr>
<td>Province</td>
<td>ON</td>
</tr>
<tr>
<td>Country</td>
<td>Canada</td>
</tr>
<tr>
<td>Postal Code</td>
<td>L1N 6A3</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Main Phone</th>
<th>(905) 668-7711 x</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Phone</td>
<td></td>
</tr>
<tr>
<td>Fax</td>
<td>(905) 666-6206</td>
</tr>
</tbody>
</table>

### LOCATIONS

- Depot - Oshawa Waste Disposal Site
- Depot - Scugog Transfer Station
- Depot - Brock Waste Disposal Site
- Depot - Pickering Waste Disposal Site
- Event - Lakeview Park
- Event - Clarington Operations Depot
- Event - Municipal Boat Launch
- Event - Pickering Recreation Complex

### REGISTERED PORTAL USERS

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Role</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annamaria Abels</td>
<td><a href="mailto:Annamaria.Abelis@fakemail.com">Annamaria.Abelis@fakemail.com</a></td>
<td>Administrator, Finance</td>
<td></td>
</tr>
<tr>
<td>Jaimie Weatherman</td>
<td><a href="mailto:Jaimie.Weatherman@fakemail.com">Jaimie.Weatherman@fakemail.com</a></td>
<td>Data Entry</td>
<td></td>
</tr>
</tbody>
</table>
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 the company or Municipal contact information
- A list of registered users for the company or Municipality and level of access
- Municipalities will view a list of associated collection sites and events (currently cannot be changed by the user)
Online Claims Portal – Account Information

• Information is not directly editable, contact PCA to make changes, examples include:
  • Adding an Event Site
  • Change to Contacts or roles
• Includes only approved Events and Depots, will update regularly from our database
• Contacts listed for security and privacy
• Future changes on the account information page to include an updating feature
Online Claims Portal

Questions

• Reminder: To pose questions please type them into the “Chat” function located on the left side of your screen
### Online Claims Portal – Submissions

#### Submissions

**Submission Title:** March Durham Depots and Boat Event

**File Name:**
- H-1050.pdf
- B-0001.pdf
- B-0002.pdf
- DA-1000.pdf

**Shipping Documents**

**Saved Unfinished Submissions**

<table>
<thead>
<tr>
<th>Title</th>
<th>Date</th>
<th>Entered By</th>
</tr>
</thead>
<tbody>
<tr>
<td>March Durham Depots and Boat Event</td>
<td>Jun 15 2015</td>
<td>Anamaria Abels</td>
</tr>
</tbody>
</table>

#### Claims Table

<table>
<thead>
<tr>
<th>Program</th>
<th>Document No.</th>
<th>Pickup Date</th>
<th>Delivery Date</th>
<th>Site ID</th>
<th>Collection Site</th>
<th>Transporter</th>
<th>Processor</th>
<th>Material Category</th>
<th>Container Type</th>
<th>Qty</th>
<th>Weight (kg)</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ontario Paint</td>
<td>H-1050</td>
<td>Mar 18 2015</td>
<td>Mar 18 2015</td>
<td>1165</td>
<td>Depot - Scug</td>
<td>Hotz</td>
<td>Drain-All</td>
<td>Aerosol</td>
<td>205L Drum</td>
<td>2</td>
<td>97</td>
<td>Kg</td>
</tr>
<tr>
<td>Ontario Paint</td>
<td>B-0001</td>
<td>Mar 18 2015</td>
<td>Mar 20 2015</td>
<td>1170</td>
<td>Depot - Broc</td>
<td>Buckham</td>
<td>Drain-All</td>
<td>Aerosol</td>
<td>205L Drum</td>
<td>4</td>
<td>204</td>
<td>Kg</td>
</tr>
<tr>
<td>Ontario Paint</td>
<td>B-0002</td>
<td>Mar 8 2015</td>
<td>Mar 8 2015</td>
<td>1175</td>
<td>Depot - Pick</td>
<td>Buckham</td>
<td>Drain-All</td>
<td>Aerosol</td>
<td>205L Drum</td>
<td>6</td>
<td>278</td>
<td>Kg</td>
</tr>
<tr>
<td>Ontario Paint</td>
<td>DA-1000</td>
<td>Mar 8 2015</td>
<td>Mar 9 2015</td>
<td>1190</td>
<td>Event - Munil</td>
<td>Drain-All</td>
<td>Hotz</td>
<td>Paints &amp;</td>
<td>20L Pail</td>
<td>4</td>
<td>1589</td>
<td>Kg</td>
</tr>
</tbody>
</table>

**Submit Claims**
Online Claims Portal – Submissions

- The core function of the PCA 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 you, 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 Municipal Name and submitting date)

• 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
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.

![ADD SUPPORTING DOCUMENTS](image)

**Shipping Documents**

<table>
<thead>
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</tr>
</tbody>
</table>
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

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

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)

• 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 **same fields** in the excel spreadsheet are also in the portal
- All of the drop down lists and **searchable menus** are the same in the portal, as in the excel template
- Once a submission is sent to PCA for validation, it is then **exportable to Excel** from the history page for your records
- The portal has some simple **validations** 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.
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
Online Claims Portal

Questions

• Reminder: To pose questions please type them into the “Chat” function located on the left side of your screen
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

*History Page 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
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.
Online Claims Portal

Questions

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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
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

- **Do I use the portal to submit for my reimbursable depot hours?**
  - ✓ You do not have to use the portal, or provide an invoice to PCA to receive your payment for depot hours. You will be paid by automatically on a monthly basis
Online Claims Portal – PCA Contacts

- **Training and Claims Questions**
  
  Cherith Sinasac  
  Ontario Program Coordinator  
  cherith@productcare.org  
  1.877.592.2972 x237  
  416.775.1907

  Patrick Chauvet  
  Ontario Program Director  
  patrick@productcare.org  
  1.877.592.2972 x356  
  416.307.2886

- **Portal & System Questions**
  
  Sarah Willie  
  Manager, Technical Services  
  sarah@productcare.org  
  1.877.592.2972 x231  
  778.331.1003

- **Finance Questions**
  
  - apayaccounting@productcare.org
Thank you!

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Ontario Program Coordinator
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416.775.1907

Holly Lafontaine
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