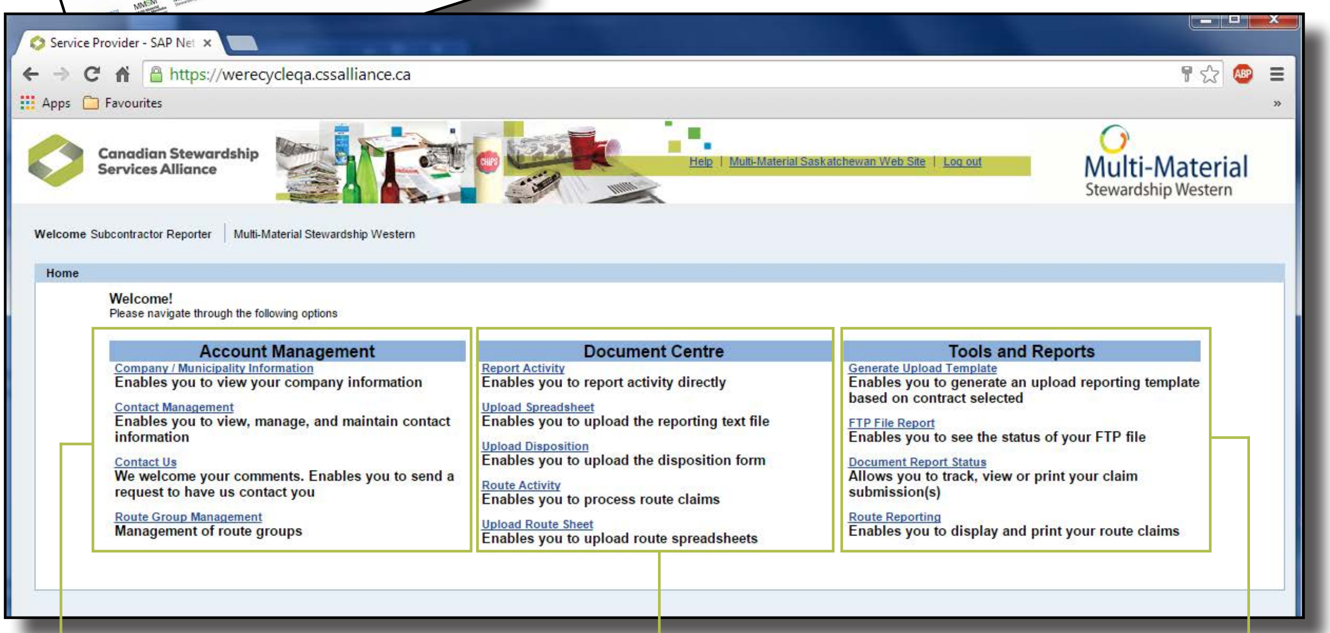
MMSW
Reporting Portal
Tip Sheets

A **User ID** and **Password** to access this portal is supplied by Multi-Material Stewardship Western (MMSW). Users can include municipalities or a Regional Waste Authority (RWA) acting on behalf of member municipalities.



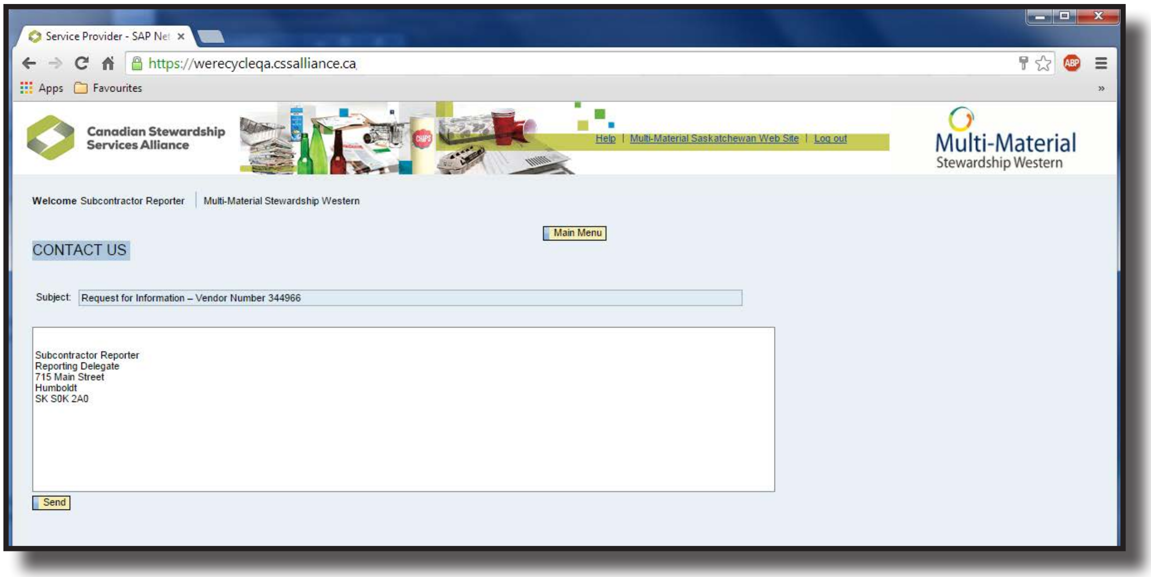
1 **Account Management Centre** – Click Company/Municipality Information to review information about your company or municipal program. Click Contact Management to manage the roles of individual contacts. Click Contact Us to speak to someone at Multi-Material Stewardship Western.

2 **Document Centre** – Click Report Activity to enter activity data directly, Upload Spreadsheet to upload the data generated from a pre-formatted spreadsheet, or Upload Disposition to enter data using an online disposition form.

3 **Tools and Reports Centre** – Generate an Upload Template to enter data using Microsoft Excel, review the status of an FTP File Report, or view and print a claim summary through Document Report Status.

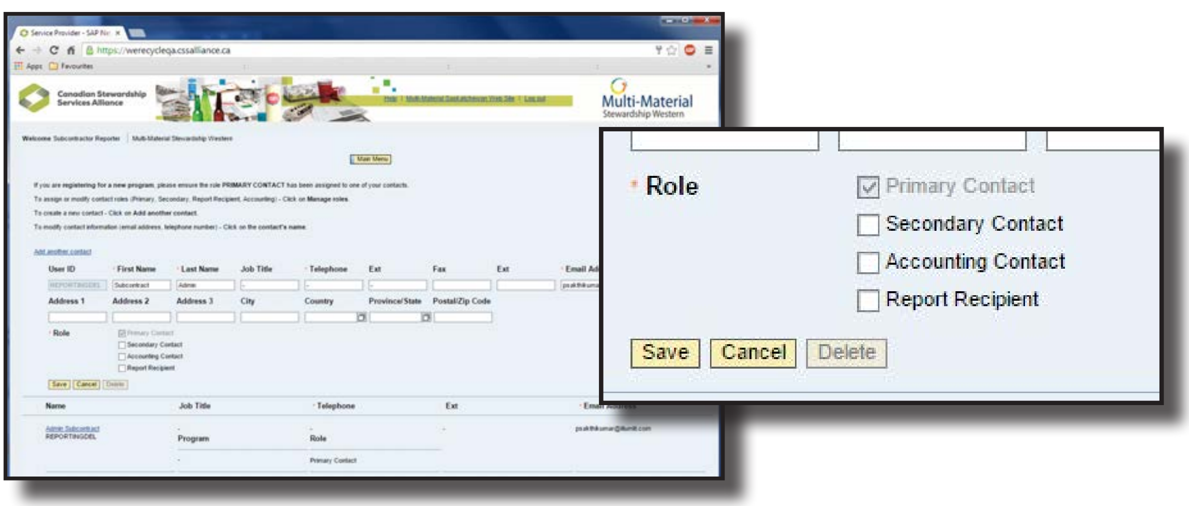
Manage your account

The **Account Management Centre** is where you review company or municipal program information, manage and maintain company or municipal program contacts, or contact Supply Chain Program administrators with any questions you have.



Contact Us

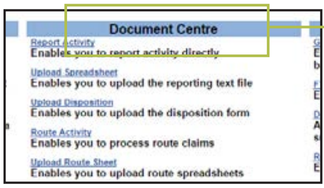
The **Contact Us** text field offers a place to ask any questions you may have. After you have typed a message above your name, click the yellow **Send** icon. The message will be delivered to the Supply Chain Program administrator who is best able to answer your question. A Confirmation window will appear when the message is delivered. Click the **OK** icon to close the Confirmation window.



Contact Management

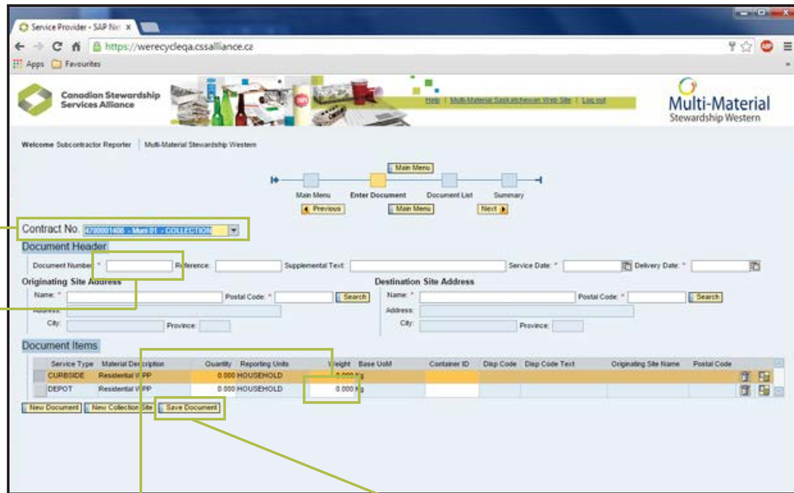
If you are a **Primary Contact** and want to change someone's contact information, click the person's **name.** Enter new information in the white text fields. Assign a role to this contact person by checking the appropriate box.

A **Primary Contact** can review account status, submit reports, and manage the roles of other users. A **Secondary Contact** can review account status and submit reports. The **Billing Contact** is responsible for accounts payable or receivable and can review the account status. A **Report Recipient** receives reports submitted by other users, but cannot submit reports or data. Pre-populated company information matches the information in your funding agreement.



Enter data

The **Document Centre** is where you can enter activity data, upload a pre-formatted spreadsheet, and upload a disposition form. Save data frequently. If you do not enter new data for 20 minutes, unsaved changes will be lost!

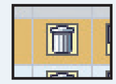


1 **Select a Contract Number** – Use the dropdown menu to select the contract for which you are reporting.

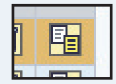
2 **Enter Information** – Click a white text field to enter information. Text fields marked with * must be completed. Blue text fields are automatically filled.

3 **Report Data** – Click a white cell to enter the quantity, date, or other data for identified material. Blue cells are filled automatically.

4 **Save Data** – Click the **Save Document** icon after you enter data. The Primary and Secondary Contacts, and identified Report Recipients, will all receive a Claim Summary by email.

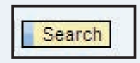


Deletes the line in orange.

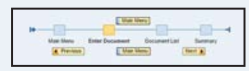


Duplicates the line in orange, but not its data.

Opens a report for a **New Collection Site.**



To search a list of available postal codes or names, enter * in the white text field and click the **Search** icon.



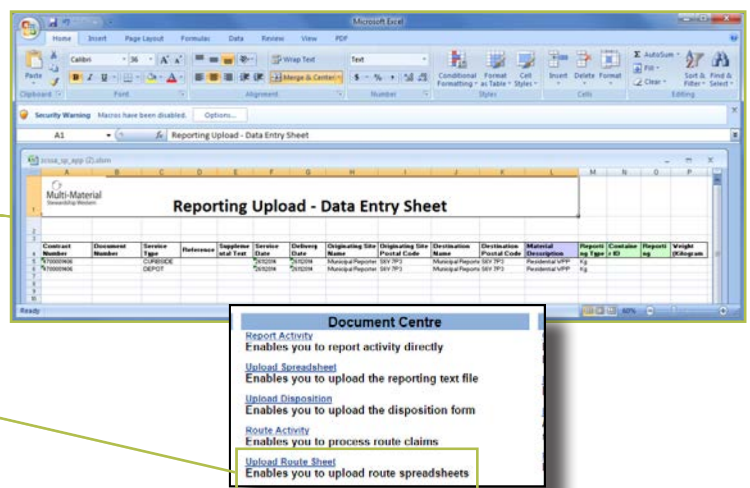
Click the **Previous**, **Main Menu**, or **Next** icons to move between the Main Menu, Enter Document, Document List, or Summary pages.

Upload claim data using a spreadsheet

Program data can be reported using Microsoft Excel spreadsheets rather than using the portal's online forms.

1 Click **Generate Upload Template** under the **Tools and Reports** Centre. Use the **Select Contract** dropdown menu to generate the newest version of that contract's Upload Spreadsheet. Sample data will show how a column's data must be entered.

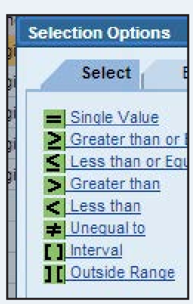
2 **Save the completed spreadsheet as a text file (.txt)** before uploading data into the program portal. Select **Upload Spreadsheet** under the Document Centre, and follow the instructions to upload your completed spreadsheet.



Advanced search options

Advanced Search Options make it possible to define search parameters. Click a grey Diamond icon or a green Parameter icon to show the available options.

Select a date using a monthly calendar.

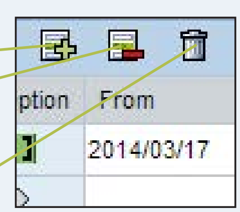


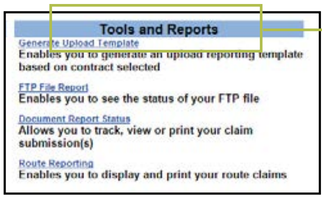
Click on a yellow arrow next to a date, status, or claim number to include more than one range in a search.

Add a line

Delete a line

Delete an entire section



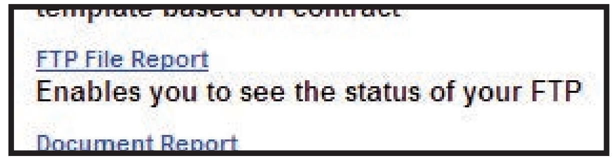


Access tools and reports

The **Tools and Reports Centre** is where you download a reporting spreadsheet that can be completed offline, view the status of FTP data, or view and print claim details.

View data submitted through an FTP

High-volume users of this portal can supply information through an FTP (File Transfer Protocol) interface. This data is saved as a secure file located in the cloud, and then automatically downloaded by Multi-Material Stewardship Western. File details can be viewed by selecting **FTP File Report**.



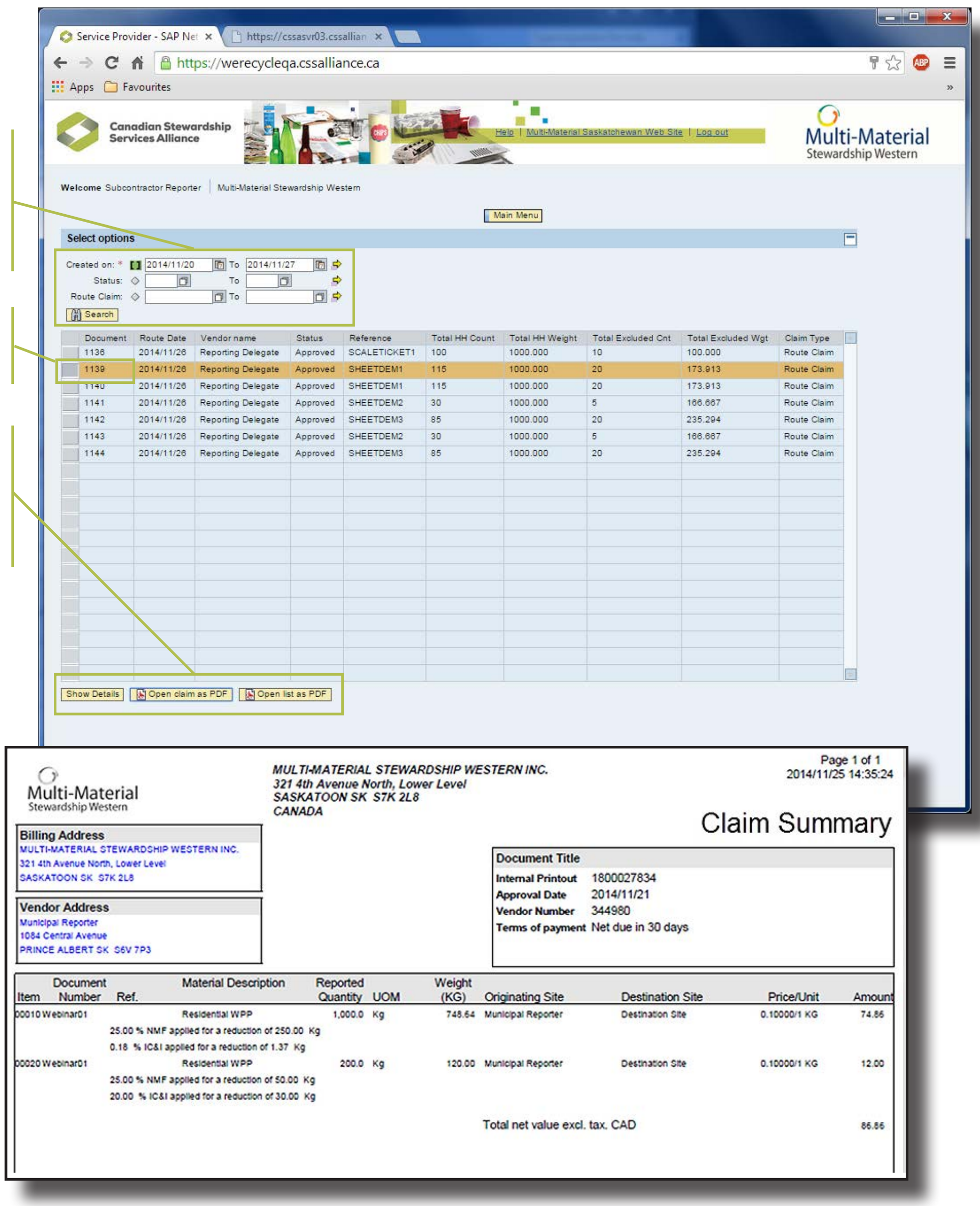
Track, view or print submitted claims

Click **Document Report Status** to search for specific reports or to view a report's current status.

1 **Search for a completed report** – Searches can include a date range, identified status, or range of claim numbers. Click the **Search** icon once range data is entered.

2 **Click on a document to review** – Selected documents will be highlighted in orange.

3 **View the document** – View a selected document's data online by clicking the **Show Details** icon. You can also download a .pdf copy of an individual claim or an entire list.



Status Definitions

Not yet approved: The Service Provider Reporting team is reviewing the claim.

Claim approved: The claim has been reviewed and approved by the Service Provider Reporting team. A purchase order has been generated and issued.

Payment in process: The Finance Department is reviewing the purchase order and invoice.

Payment processed: The Finance Department has processed the invoice. Funds have been transferred electronically, or a cheque has been issued.

Multi-Material
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