UOMA EHC OneWindow

Remitter User Guide

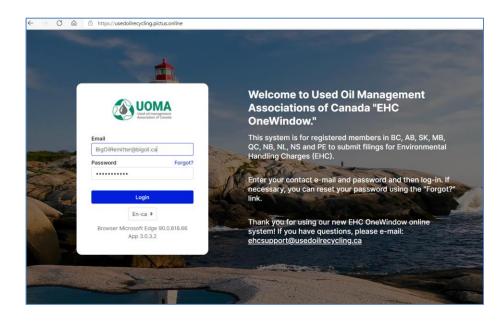


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Getting Started

- Use the latest version of Google Chrome, Mozilla Firefox or Microsoft Edge as your internet browser. <u>Note:</u> Internet Explorer is not supported.
- 2. The system link is: <u>usedoilrecycling.pictus.online</u>



- 3. Initially you will sign in with the **email address** that you normally use to make your EHC submissions.
- 4. Set your Password using the **Forgot?** function on the Log-in page.



- 5. You will receive an e-mail from "noreply@usedoilrecycling.ca" with a link to set (or reset) your password. Note that this link is only valid for 24 hours so a new password must be set during that timeframe.
- 6. Passwords must be at least **10 characters**, and contain at least: 1 upper case, 1 lower case and 1 number.
- 7. If you don't receive an e-mail in your Inbox, check your "Junk" folder in case your system does not recognise the e-mail ID (and mistakes it for junk).
- 8. You can choose English or French as your default **language**. Set it initially on the main page and then update your profile to set it permanently.
- 9. If your business is already registered with at least one Agency, we have already given you access to the system. If you want to apply to register in a new jurisdiction, contact the relevant Agency or send an email to ehcsupport@usedoilrecycling.ca.

- 11. An **Organization** is the parent company that contains one or more Remitters (also known as Businesses, Suppliers or Members). A **Remitter** is the provincial level that is responsible for the submission of EHC filings.
- 12. You can create data and invite users at both an Organization level or at a Remitter/Business level. The initial structure has been set up so that all addresses, contacts, notes and users are at the Organization level (so they relate across all Remitters belonging to the Organization).

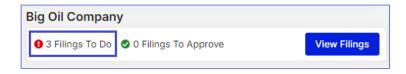
10. You should "bookmark" the EHC One Window website for future reference.

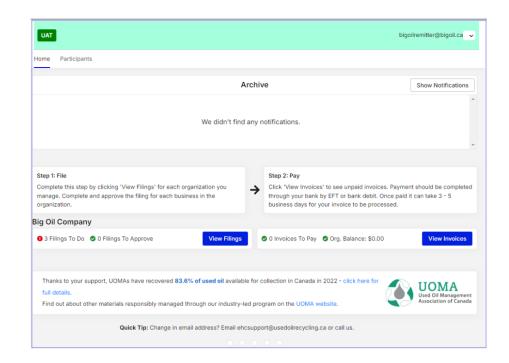


Home Page

Login > Home

- **Home** is the first page you'll see upon login.
- The Home page includes:
 - A **Notifications** section that will show you tailored communications relevant to the Associations you are registered with,
 - o Instructions for Filing and Paying as a Remitter,
 - A Summary section for Filings and Invoices, each with a blue navigation button to get you to where you need to be quickly,
 - An Informational Banner that will display UOMA news, links, and other information, and
 - o A carousel of **Quick Tips** about interacting with One Window.
- To submit your EHC Remittances, click on the blue View Filings button.
 The File page will be displayed showing a list of available filings you need to complete. (See Page 7)





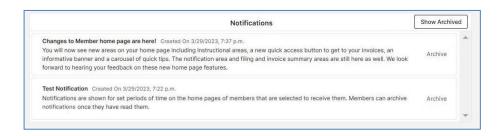
 To review your Remittance Invoices, click on the blue View Invoices button. The Open Invoices page will be displayed showing a list of approved filings. (See Page 8)

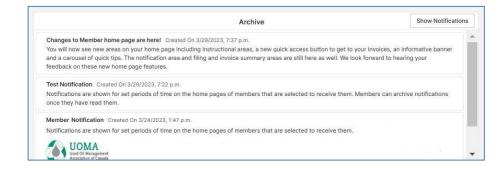




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- The Notifications section on the home page has an associated **Archive**.
- You can choose to archive notifications after reading them by clicking on the **Archive** option at the right side of the notification.
- Notifications have an expiry date; if you don't archive them prior to this
 date, they will automatically be moved to the archive when they expire.
- You can view your archived notifications by clicking the Show Archive button to the right of the Notification section heading.
- To return to your active notifications, click on the Show Notifications button to the right of the Archive section heading.







Filing Page

Login > Filing App

- **Note:** If your user ID is at the organization level, you will see filings for every province in your organization. If your user ID is at the provincial level, then you will only see filings for your province.
- Click the **File** button on a particular line to open an individual filing.
- Follow the next three steps:
 - 1. File
 - 2. Approve
 - 3. Review your Open and Closed Invoices

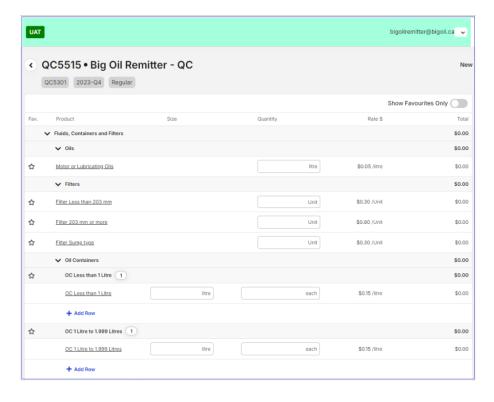


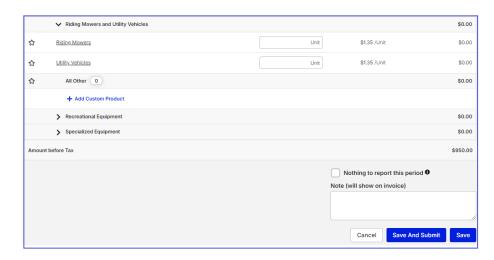
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1. File

Login > Filing > File

The **Filing** page shows the product catalog. Complete the quantity and/or size boxes with sales for the period. For instructions on how to customize the extensive Product Catalog, see **Customizing Filing Page** on page 12. For instructions on how to add custom OEM products (applicable in AB only currently), see **Customizing OEM** on page 11.





- If you need to come back and complete the filing later, click **Save** at the bottom of the page and it will still be available on the File page. If you are done, click **Save and Submit**. The filing will no longer be editable.
- If there is nothing to report for this period, click on the "Nothing to report this period" checkbox and select Save and Submit to file a Nil Return.
- You can add Notes to your filing that will show on the invoice that is generated.



2. Approve

Login > Filing > Approve

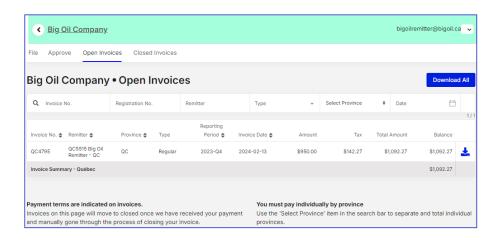


- A user with a Filing Approver role can approve or reject one or more filings.
- Select one or select all, click the Amount checkbox, the Certification checkbox, then click Approve.
- To reject a filing, select the Filing to open, and click Reject Filing.
- Note: This approval step MUST be completed to finish the filing.

3. Review Invoices

Login > Filing > Open Invoices

- Approved filings are displayed on the **Open Invoices** page and emailed to the approver.
- Invoices can also be downloaded to a file to be printed, saved, or emailed. Click on the blue arrow to the right of the invoice to open or save the invoice (in PDF format).
- The invoice can now be used to submit your payment to the applicable Association through your company's regular payment processes. Once the payment is received and processed it will appear in the Closed Invoices tab.





Managing Your Account

My Profile

- From Home, you can edit your Profile information by clicking on Profile in the drop-down menu (down arrow) in the upper right corner beside your e-mail ID. Your profile contains your Contact information.
- You can set your language preference here as well.
- <u>Note</u>: You cannot edit your e-mail ID as that is your Account name. If your e-mail has changed, you need to setup a new Contact. Contact <u>ehcsupport@usedoilrecycling.ca</u> for help with this.

Password

- You can change your Password at any time by selecting Change
 Password on the drop-down menu in the upper right-hand corner of the screen, or the Forgot? link on the login page.
- You will receive an email to reset your password. The link in the email is only valid for 24 hours, so a new password must be set during that timeframe.
- Passwords must be at least 10 characters, and contain at least: 1 upper case, 1 lower case and 1 number.

Logout

 For security reasons, when you are done, sign out of the system by going to the drop-down menu on the upper right corner of the screen, and Logout of your account. Automatic logout occurs after 2 hours.

Managing Your Organization

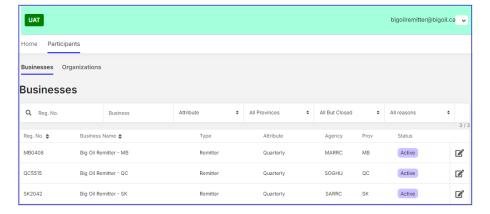
Participants – Businesses and Organizations

- From the Participants tab, you can edit the information about your
 Organization and Remitters. Please note that contacts are generally set
 up at the Organization level, so they receive information from all
 associations that your Organization is registered with.
- To do this make sure you are on the Organization tab as shown in the
 following screen then click on the edit icon
 on the right side. You
 can then update your company information including addresses and
 contacts.

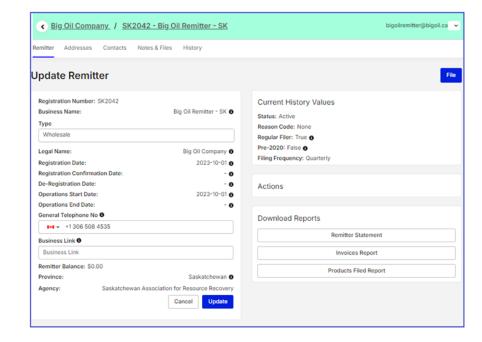


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• From the **Businesses** tab you will see all the associations you are registered with.



- You can access the Remitter tab showing business profile by clicking on the edit icon to the right of the business listing. The Remitter tab for the selected business will open.
- On the Remitter tab, you can view and update Remitter details, and view the current state of the Remitter in the system under the Current History Values section.

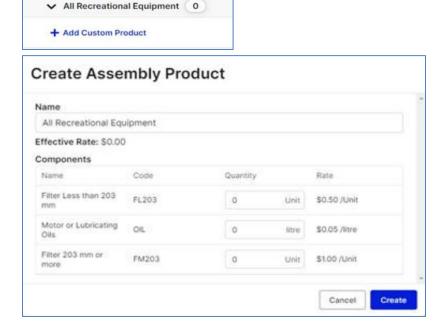


In the Actions section, by clicking on the associated button you will be
able to download a Remitter Statement which shows the current details
of your account with that Association, as well as an Invoices Report and
a Products Filed Report.

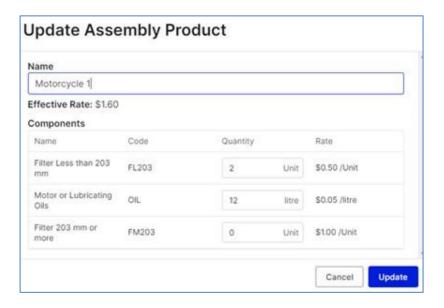


Customizing OEM

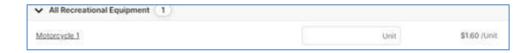
- Customizing is for any OEM product that is not currently setup on the standardized product catalogue list. You may have customized equipment, or the components do not correspond with ones already listed. Creating a customized assembly product will help you for future reporting.
- To add a custom OEM product, select Add Custom Product under the applicable category. For example, to add a type of Motorcycle select "Add Custom Product" under "All Recreational Equipment".



- Click Create to create your OEM product.
- Title the OEM as you see fit. And then you can enter the quantities of oil/filter types that are contained in one unit of your OEM product.



Enter the number of units sold.





Customizing Filing Page

There are two options to reduce the size of the Filing Page. Option 1 shows a longer list that just has Product Categories on it. Option 2 is the best option, as it shows only products your company remits on, and it can be changed from time to time.

Option 1

The **first option** is to click on the arrow beside the product category and it will either scroll the category up or scroll the whole category down.



By clicking on the **arrow** beside **Filters**, the whole category has now been rolled up and is not visible until the arrow is clicked again.



Option 2

The **second option** to make this Products List shorter is to use the Favourites Star to the left of each product for which that business files. If your business only files a few products, this is the best option. By ensuring that the "**Favourite Star**" is blue and the "**Show Favourites Only**" button is on; the Product List becomes more manageable, and the shorter list will be available for future filings after being set up.

If you add a new product to remit on; simply turn off the "Show Favourites Only" button, choose the additional item to "star" and then turn on the "Show Favourites Only" button again. You will find your newer item on the list.

