



Supporting Colorado Service Providers

June 2, 2026

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Consequently, competitors must avoid discussing certain topics when they are together, meeting virtually, or at any other time:

- Prices, fees, rates, profit margins, discounts, promotions, rebates, or other terms or conditions of sale;
- Pricing strategies, methods, trends, plans, or timing of price changes;
- Salaries, costs, and other factors that affect pricing; the hiring or recruitment of other members' employees;
- Allocation of markets or customers or division of territories;
- Topics that may lead participants to not deal with or to boycott a particular supplier, customer, or third party;
- Reductions of output; bid-rigging;
- Or any other anti-competitive topics or actions.

Failure to comply with these antitrust laws will not be accepted.

Meet the Presenters



KEVIN HELLESTAD

Manager

Service Provider Data
Analytics & Claims



CHRIS ARMENI

Director

Service Provider Data
Analytics & Claims



DAN LANTZ

Senior Manager

Service Provider Data
Analytics & Claims



ROB WRITZ

Director of Operations

Circular Action Alliance
Colorado

Agenda

1. About Data and Analytics
2. Reporting Overview
3. Data Transformation
4. Report Process
5. Help and support

Chris Armeni

Who is Data & Analytics (D&A)

Who is D&A?

- Official Team Title: **Service Provider Data & Analytics**
- We are the guardians of the supply chain data and responsible for the system set up
- Unofficial Title: **Your go-to team for Service Provider Reporting!**

Kevin Hellestad

Kevin Hellestad Reporting Overview

Reporting @ 10,000 Feet

- Activity Reports are how we know how much and what type of material Service Providers collected or processed
- These reports ensure we have all the necessary information to issue payments
- These reports are submitted on the Service Provider Portal based on each Service Provider's preference (can upload at any time, but uploading frequently is preferred)

Guide to CAA portals

Service Provider Portal

- Used by service providers including local governments, haulers, processors to submit reports, request reimbursements and other tasks.
- Producers will not use this portal.

Education & Outreach (E&O) Portal

- The E&O Portal is used by local governments and service providers to access and edit educational materials.

Producer Portal

- The Producer Portal is used by producers for registering and reporting with CAA.
- Local governments and service providers will not use this portal.

SP Portal – Two Main Functions

Activity Reporting

- Submit activity reports
- Review status of activity reports
- Receive and review monthly summaries
- Access reporting templates and documents

Invoicing

- Extra security: only available to billing contact
- Enter and update bank information
- Submit invoices
- Review invoice status

Who Submits Activity Reports?

- Processors (MRFs, IPMRFs)
 - Inbound & Outbound scale tickets
 - Monthly inventory summary
 - Transportation activity
 - Electronic sample log
 - Blended value report
 - Contaminated and rejected load details
- Local Government Collection Fleets and Collection Contracts
 - Collection tons
 - Service addresses
 - Route information
- Local Government Drop-offs
 - Outbound hauling report

Activity Reports
(Recommend daily or weekly
depending on transaction volume)

- Each activity report type will have a template to be filled out
- Activity reports will reference standard lists provided by CAA for facilities, communities, haulers and materials
- Activity reports will be uploaded to the Service Provider Portal and validated

Who Submits Invoices?

- All Service Providers requesting reimbursement will submit an invoice
- For invoices related to **Activity Reports**, CAA will create a Monthly Summary of all submitted data for the previous month.
 - Invoices must match data on the Monthly Summary.
- Invoices for education & outreach or compost funding are reported separately through annual or semi-annual reports.

Invoices (Frequency as indicated in contract)

- MRF, IPMRF
- Transfer Facility
- Local Government Collection
- Local Government Drop-off
- Local Government Community Education & Outreach
- Open Market Collection (future)
- Compost Funding (future)

Kevin Hellestad

Kevin Hellestad Activity Report Overview

Reporting Overview

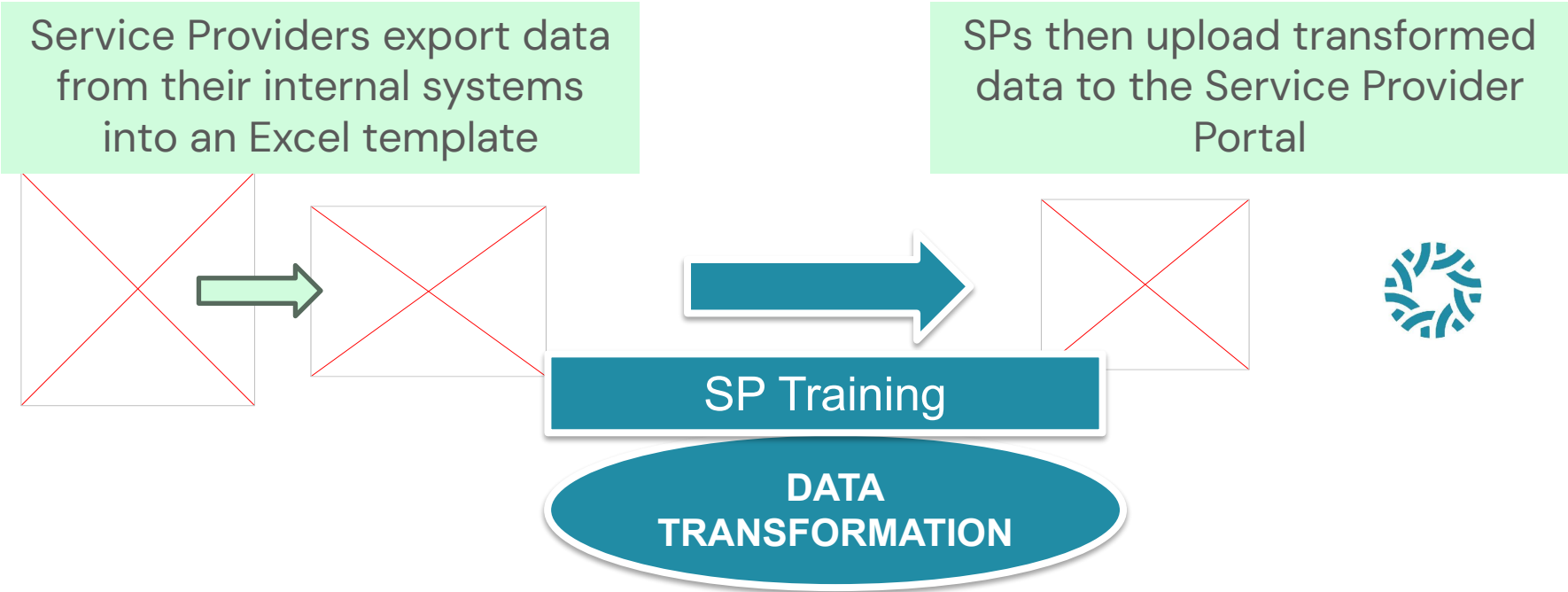
- Data required for Activity Reports is sourced from Service Provider records
- Each Service Provider has their own unique record keeping system
- CAA systems must be able to read data from all Service Providers
- A certain amount of data transformation is required

Dan Lantz

Dan Lantz

Data Mapping & Transformation

Data Mapping



TS, IPMRF and MRF Inbound Reporting

- All inbound transactions from residential routes must be included in the report
 - Must include the following:
 - Date and Time
 - Weigh scale Ticket Number
 - Originating Community and ID# (both provided by CAA)
 - Only for direct from curb routes
 - Hauler Name and ID# (both provided by CAA)
 - Originating Facility Name and ID# (both provided by CAA)
 - Only for transfer hauls from TS to IPMRF or MRF
 - Destination Facility Name and ID# (both provided by CAA)
 - Route # (for residential routes only)
 - Material Name and ID# (both provided by CAA)
- Gross, Tare and Net Weight

TS, IPMRF and MRF Outbound Reporting

- All outbound transactions from all post-collection facilities must be included in the report
- Must include the following:
- Date and Time
- Scale Ticket Number
- Originating Facility Name and ID# (both provided by CAA)
- Destination Facility Name and ID# (both provided by CAA)
- End Market Name and ID# (both provided by CAA)
- Material Name and ID# (both provided by CAA)
- Gross, Tare and Net Weight

Making it Match!

- CAA will provide you with an excel template that includes CAA REFERENCE DATA
- These “mapping keys” enable a conversion process to ensure your scale program output matches the CAA format
- One-on-one sessions will be conducted with each Service Provider
- We will walk you through the process of mapping your unique set of data so that your reports are seamlessly accepted in the Service Provider Portal
- And we’re always available for questions

Kevin Hellestad Activity Report Submission Process

Portal Experience

- Submit Activity Reports
- View & Download Monthly Summaries
- View Validated Reference Data
- Receive Documents from CAA
- Submit Support Cases & Adjustment Requests
- View Knowledge Articles as well as FAQs
- Submit Service Applications
 - Which many Service Providers have already done.

Logging into Service Provider Portal

- If you already submitted service applications into the portal:
 - Continue to use that login, as you will have all this functionality.
- If you need to add someone with access to Service Provider Portal
 - Email: serviceproviders.support@circularaction.org
 - Organization Name/Account Name
 - Contact Name
 - Contact Email
 - Contact Phone #
 - A notification email to set up their account will be sent from CAA
- <https://www.circularactionportal.org/serviceproviders/>

Activity Reporting Process

- You will only be able to submit activity reports agreed upon in individual service provider service agreements.
 - Ex. MRF operators will only be able to submit activity pertaining to their MRF
 - Haulers will only be able to submit activity pertaining to hauling in the program plan
 - If a service provider operates a MRF and is a Hauler, they will be able to submit activity for both.
- Successfully submitted, validated, and accepted activity reports will be used to determine reimbursement level on monthly summaries

Submitting Activity Reports

- Log into Service Provider Portal
 - <https://www.circularactionportal.org/serviceproviders/>
- Select "Activity Report" in Banner Menu
- Select "+ New Submission" to open new submission

Activity Report Submissions

[+ New Submission](#)

#	Activity Report Submission Number	Activity Report Type	Status	Submitted Date	Submitted By
1	ARS-0000526	Processor Inbound Report	In Progress	5/26/2026	Joe Hendry
2	ARS-0000525	Transportation Activity	Accepted	5/26/2026	Joe Hendry
3	ARS-0000524	Processor Actual Blended Value	Accepted	5/26/2026	Joe Hendry
4	ARS-0000523	Processor Actual Blended Value	In Progress	5/26/2026	Joe Hendry
5	ARS-0000522	Processor Outbound Report	Accepted	5/26/2026	Joe Hendry
6	ARS-0000521	Processor Outbound Report	Other	5/26/2026	Joe Hendry
7	ARS-0000520	Processor Inbound Report	Accepted	5/26/2026	Joe Hendry
8	ARS-0000519	Processor Inbound Report	In Progress	5/22/2026	Joe Hendry
9	ARS-0000518	Processor Inbound Report	Rejected	5/22/2026	Joe Hendry
10	ARS-0000514	Processor Inbound Report	In Progress	5/18/2026	Joe Hendry

Records per Page: 10 | Search: Enter search term ...

Navigation: < First | < Prev | Showing Page 1 of 11 Pages | 1 | Next > | Last >

Submitting Activity Reports

- Select Activity Report Type from Dropdown
 - Will only be able to see activity reports assigned from service agreement
 - Downloadable Excel template with directions for all activity reports available
- Enter comment on submission
 - Typical comment includes date range, facility, & any additional notes
- Upload activity report file
 - Can be uploaded, or dragged & dropped
- Select "Submit Report"
 - Page will return you back to main Activity Report table once file has been uploaded to CAA



New Activity Report Submission

Complete all required fields and attach your completed template file (.XLSX only).

STEP 1 — REPORT DETAILS

Activity Report Type *

Processor Inbound Report

PROCESSOR INBOUND REPORT RELATED DOCUMENTS



Processor Inbound Activity Report
Template

13.9 KB



Comments *

Test

4 / 3,000

STEP 2 — ATTACH FILE *



[Click to upload](#) or drag & drop

Only .XLSX file allowed.



Processor Inbound Activity Report working template_V3 (1) (1).xlsx

11.4 KB



Cancel

Submit Report

Viewing Activity Report Status

- Activity Report Submission table
- Status meanings:
 - In Progress: Automated Validation has been performed, awaiting CAA review.
 - Accepted: CAA validated file and data has been accepted.
 - Rejected: Validation failed and new submission needs to be uploaded
 - Other: File was previously accepted, but now rejected
- If Status = Rejected
 - Click on Submission ID # will allow view of Validation Details explaining error by line.
 - CAA will also be willing to provide help understanding any validation fails and advise on fixes.

Activity Report Submissions

Records per Page

10

Enter search term ...

#	Activity Report Submission Number	Activity Report Type	Status	Submitted Date	Submitted By
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3	ARS-0000524	Processor Actual Blended Value	Accepted	5/26/2026	Joe Hendry
4	ARS-0000523	Processor Actual Blended Value	In Progress	5/26/2026	Joe Hendry
5	ARS-0000522	Processor Outbound Report	Accepted	5/26/2026	Joe Hendry
6	ARS-0000521	Processor Outbound Report	Other	5/26/2026	Joe Hendry
7	ARS-0000520	Processor Inbound Report	Accepted	5/26/2026	Joe Hendry
8	ARS-0000519	Processor Inbound Report	In Progress	5/22/2026	Joe Hendry
9	ARS-0000518	Processor Inbound Report	Rejected	5/22/2026	Joe Hendry

Activity Report Submission
ARS-0000518

Activity Report Submission Number
ARS-0000518

Activity Report Type
ARTI-000023

Submitted By
Joe Hendry

Submitted Date
5/22/2026, 2:20 PM

State of Operation
SQOID-000090

Created By
Joe Hendry, 5/22/2026, 2:20 PM

Status
Rejected

Rejected Reason Details
please check validated report for more detailed errors

Rejected Reason
Activity information invalid

Last Modified By
Kevin Hellestad, 5/22/2026, 2:24 PM

Related Documents

Processor Inbound Activity Report Test Data.xlsx
EXCEL_X - 22.1 KB - 05/26/2026

Validation_Details_a0xOu00000AYBJFIAX.xlsx
EXCEL_X - 12.7 KB - 05/26/2026

Notes (1)

Title	Text Preview	Created By	Last Modifi...
Processor ...	For Monthly...	Joe Hendry	5/22/2026, ...

View All

Monthly Summaries

- Monthly Summaries will be Delivered on the Monthly Summary tab
 - If Report Status = Approved, can be used to invoice for reimbursement
 - Summary can be found by selecting Monthly Report number
- If Monthly Summaries need custom creation
 - Shared via "Related Documents" in Service Provider Information Tab
 - Emailed to you
 - Emailed monthly summaries will be password protected.

Monthly Reports

#	Monthly Report Number	Service Provider	Reporting Month	Reporting Year	Status
1	MR-0000023	TNA Recycling	March	2026	Approved

Records per Page: 10 Search: Enter search term ...

Navigation: First, Prev, Showing Page 1 of 1 Pages, 1, Next, Last

Monthly Report MR-0000023

Monthly Report Number
MR-0000023

Service Provider
[TNA Recycling](#)

Created By
[DataFoundation Integration](#), 5/14/2026, 10:19 PM

Reporting Month
March

Reporting Year
2,026

Last Modified By
[Kevin Hellestad](#), 5/26/2026, 1:45 PM

Related Documents

[Monthly_summary_transportation_activity_monthly_summary_...](#)
EXCEL_X - 5.3 KB - 05/26/2026

Notes (0)

Change Management

- Routes and vehicles may change after you've completed data transformation
- If any of the following changes occur, updates will be needed to your Reference Data tables
 - New originating & destination facilities
 - New materials
 - New communities
 - New haulers
- Outdated data does NOT need to be removed
- CAA can simply add new data to your Reference Data tables

Account Name TNA Recycling	Phone (+1) 3034445555
Parent Account	Website
DBA Name/Trade Name	Tax Exemption Status No

Related Documents

- [OR-Zip-Codes-Urban-Rural-Designations](#)
PDF - 404.5 KB - 05/18/2026
- [Glass Hauler Activity Report \(21\)](#)
EXCEL_X - 42.4 KB - 04/29/2026
- [SP_Communities_2026-04-16](#)
EXCEL_X - 19.8 KB - 04/22/2026
- [Validation_Details_a0xPU000005OwnxYAC](#)
EXCEL_X - 12.1 KB - 04/20/2026
- [Test File Sharing WCAR](#)
EXCEL_X - 9.2 KB - 04/20/2026

Facilities Reference Data Records per Page [Download Facilities](#)

[Facilities](#)
[Haulers](#)
[Materials](#)
[Communities](#)

#	Facility ID	Facility Name	Facility Type
1	CRPF_Test1	Test CRPF	MRF
2	REM_TestCO	CO Test REM	REM
3	RF_TestCO	CO Test TS	TS
4	MRF_8XXXX	Test MRF 10.12 Fill In	MRF
5	MRF_8XXOO	CO Retest MRF	MRF

Next Steps

Service Provider Timeline

- After Service Agreements are completed:
 - Kick-off meeting with CAA Colorado
 - Access to Service Provider Portal
 - Access to Accounts Payable
- **June 9** – Service Provider Portal Training for Local Governments
- **June 12** – Service Provider Portal Training for Processors
- More engagement & support to come!



Upcoming
Colorado
Webinars

Tip for Success

To ensure you receive email from CAA:
Please whitelist circularaction.org
domain name on your email platform



Questions?

Thank You



Summit for Recycling - Westminster, Colorado - June 1st-3rd, 2026