

TSSA PORTAL TRAINING GUIDE

Owner Processes



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1.1 Redeem Invitation

All Portal users will be required to register with TSSA Administrative Support. A Portal Contact Record will be created under your company's account with an invitation to the Portal emailed to user. To register a new user please contact customer Support (2) two business days in advance. To redeem your portal invitation, follow the instructions below:

1. Open Invitation Email sent from TSSA Administrative Support and select the "Redeem Invitation" Link to redeem your account invitation in the portal.

User should be re-directed to the portal Redeem Invitation Login Page

2. Select the [Register](#) Button to redeem invitation

The screenshot shows the 'Redeem Invitation' page of the TSSA portal. At the top left is the TSSA logo. Below it, there are two tabs: 'Sign In' and 'Redeem Invitation', with the latter being the active tab. The main heading is 'Sign up with an invitation code'. Below this is a text input field labeled 'Invitation Code' with a red asterisk indicating a required field. The field contains a long, complex URL. Below the input field is a blue 'Register' button.

Register a New Account

3. Enter a unique password in the Password field. All Passwords must be a minimum of (8) eight characters with an uppercase character. There must also include a numerical, or special character.
4. Re-enter your password in the Confirm Password field, then select the Register button.



[Sign In](#) [Redeem Invitation](#)

Redeeming code: **leEAPUhv2tywymrVjLdvx4-pAZr5yRy-zMFLYMy0x48uLDui9Q4fntmG8lpEziJKSYrXCmqM1XnujB3v3-hJYk2yC6A9zZaMMFNcRS4NFQnigvIVXIStBKCS4GWjniHzW6r8pCD2EkwOMg0s5mzC9KEy9oTowCyZvj6CdIfY-**

Register for a new local account

* Business Email

* Password

* Confirm Password

Once your password has been validated you will be redirected to your Profile page for Validation.

Validate your Profile

5. Review your profile to validate your following contact details to ensure the TSSA has the correct information:
 - Name
 - Phone
 - Email
 - Billing address
6. The system requires that you validate that you confirmed your email address. Select the Confirm Email button in the top right corner. See Screenshot below.


The system should have sent a Confirm your Account Email Notification

7. Select the Complete Registration Link in the email to finish your account validation.
8. The system will display a confirmation message once your email has been confirmed successfully.



Email Validation Button

Profile

 jessica myrie

Profile

Security

Change Password

Your email requires confirmation. [Confirm Email](#)

Your Information

General

First Name * jessica	Last Name * myrie
E-mail jmyrie@tssa.org	Business Phone
Company Name JESSICA TEST OWNER	


Billing Address

Street 1 100 King St W	Province ON
Street 2	Postal Code M5X 1C9
Street 3	Country Canada
City Ajax	

[Update](#)

Email Validation Confirmation

Profile

 jessica myrie

Profile

Security

Change Password

Your email has been confirmed successfully. [x](#)

Your Information

General

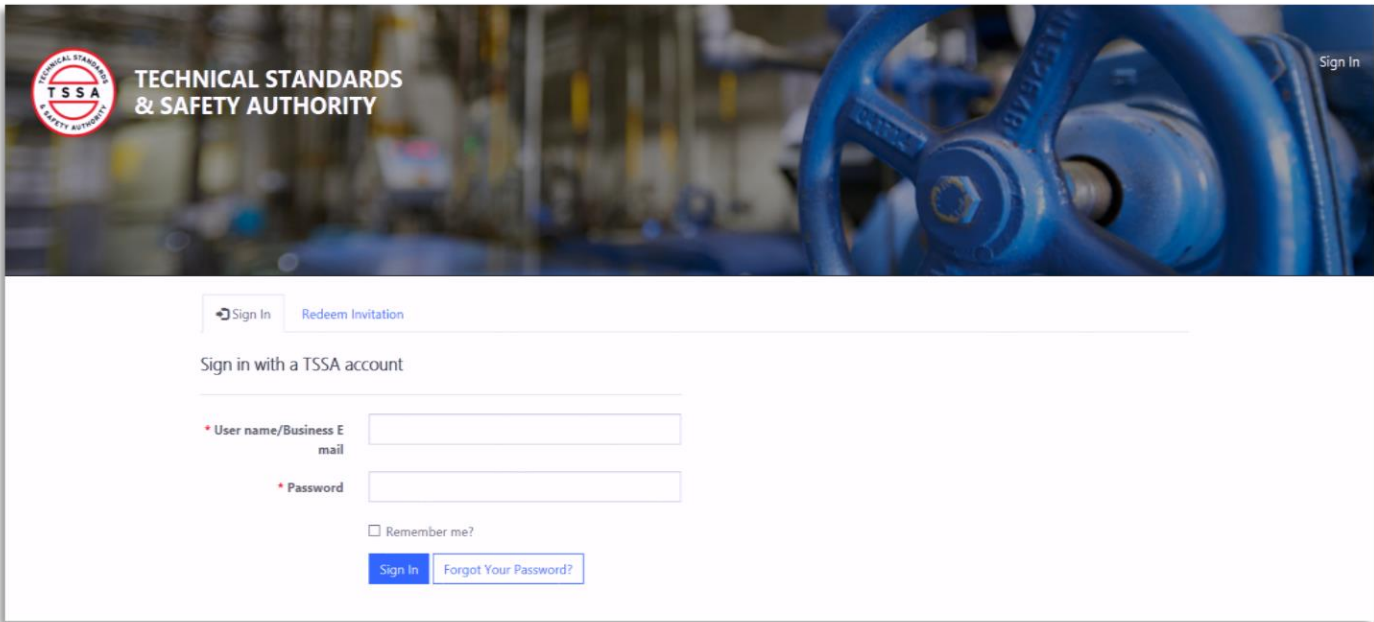
First Name * jessica	Last Name * myrie
E-mail jmyrie@tssa.org	Business Phone
Company Name JESSICA TEST OWNER	



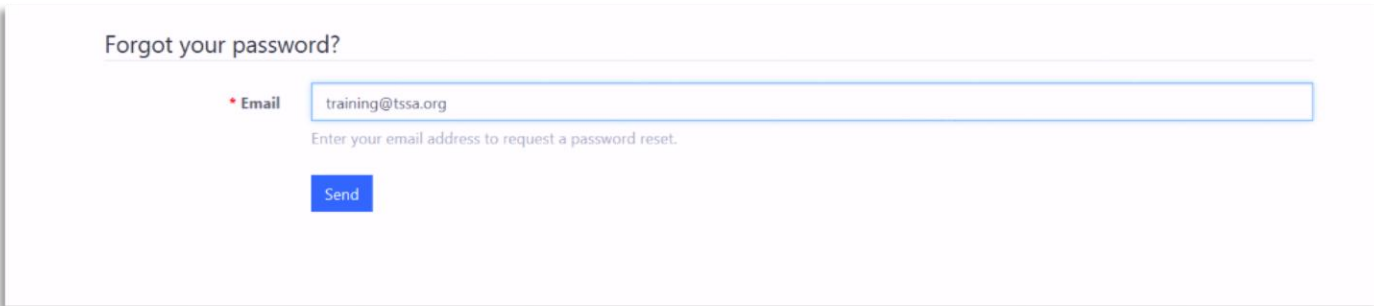
1.2 Reset Password

Resetting your password is a self-serve function within the portal. If you have forgotten your password, or would simply like to make a change you can initiate a password reset from the user login page. To reset your password, follow the instructions below:

1. Select the “Forgot your Password?” button from the portal Login Page.



2. Enter your user name/Business Email and select the send button.



The system should have sent a Reset Password Confirmation Email with the following message displayed



Forgot your password?

Please check your email to reset your password.

- 3. Retrieve the email confirmation and select the “Reset Password” link in the message to initiate your password reset.
- 4. Enter your new password, then confirm your new password as displayed below. Then select the “Reset” button to save your changes.

Reset Password

New Password

Confirm New Password

Once your password has been validated and saved by the system you will be directed back to the portal login page to login.

- 5. Enter your existing username/ business email and your new password to login. Then select the “Sign In” button.

[Redeem Invitation](#)

Sign in with a TSSA account

* User name/Business E mail

* Password

Remember me?



1.3 Manage Profile

Portal users can manage their contact phone number and business address through the Portal Profile page. On this page users can view their latest contact information, and make updates that will be captured and saved in the system. To view and perform profile updates, follow the steps below:

1. You will notice your name in the top right corner of the screen as a menu label. This is an indicator of the user which is logged into the portal. This is also the place where a user can select to view their profile or Sign out of the Portal.
2. Select the Profile option from your User Name Menu in the top right corner.



3. Override or populate the phone and/or Billing Address fields that need to be updated.
4. Once complete select the "Update" button to save the changes.

Profile

MALAHKAI GORDON

Profile

Security
[Change Password](#)

Your Information

General

First Name *	Last Name *
<input type="text" value="MALAHKAI"/>	<input type="text" value="GORDON"/>
E-mail	Business Phone
<input type="text" value="JESSICA_MYRIE@YAHOO.CA"/>	<input type="text" value="416-123-4567"/>
Company Name	
<input type="text" value="JESSICA'S TEST INSURER"/>	

Billing Address

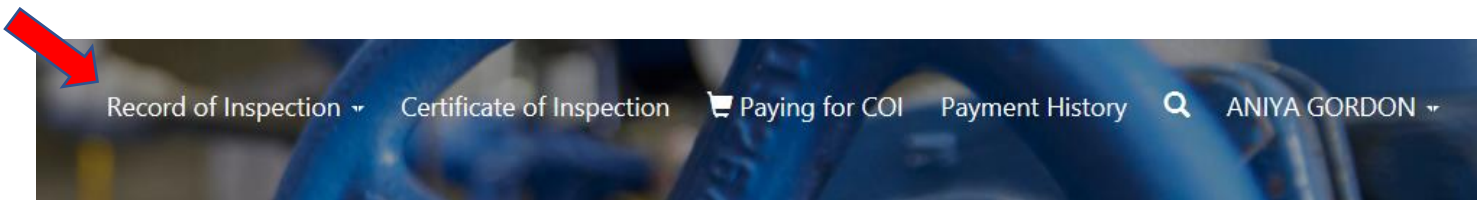
Street 1	Province
<input type="text" value="345 Carlingview Dr"/>	<input type="text" value="ON"/>
Street 2	Postal Code
<input type="text"/>	<input type="text" value="M9W 6N9"/>
Street 3	Country
<input type="text"/>	<input type="text" value="Canada"/>
City	
<input type="text" value="Toronto"/>	



2.1 View Your Record(s) of Inspection

When a Periodic Inspection is performed by an Insurer or Inspection Agency a copy of the Record of Inspection (ROI) is required to be submitted to the Technical Standards and Safety Authority (TSSA). When the record has been received the owner of the location will be notified by the TSSA. All Owners are then required to log into the portal to view and validate their ROIs. To view and validate your Records of Inspection follow the steps below:

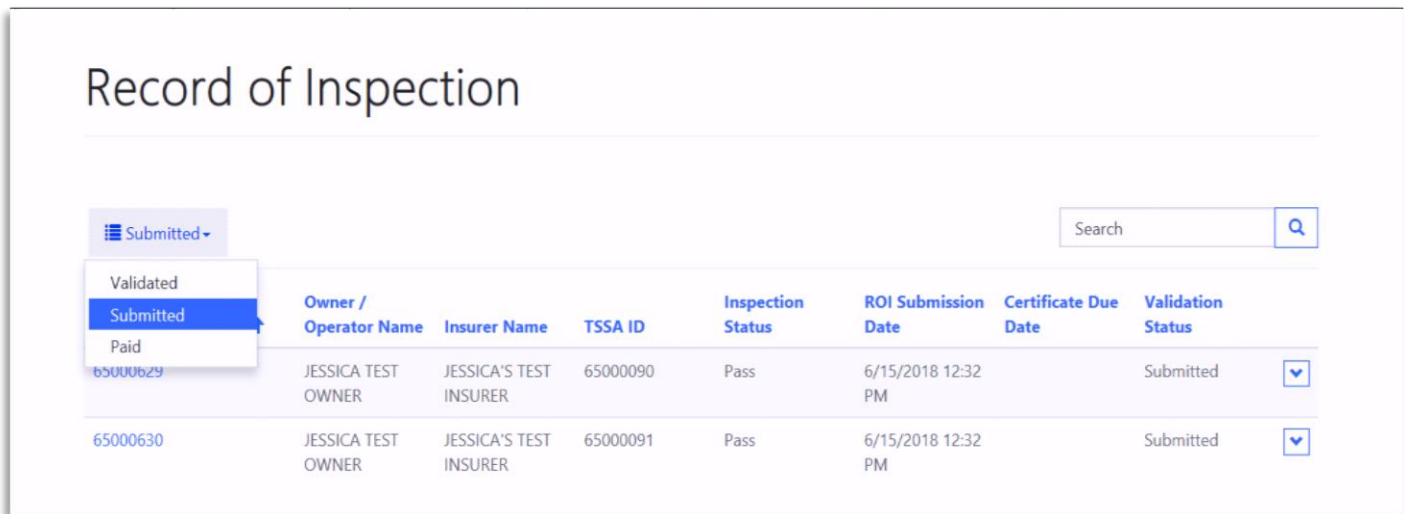
1. Select “Record of Inspection” from the “Record of Inspection” top menu to view your submitted records of Inspection.



All records have been categorized based on records status. Applicable statuses are defined below:

ROI Status	Definition
Submitted	Record of Inspection submitted and passed system validation
Validated	Record of Inspection submitted and validated by the owner
Paid	Record of Inspection submitted, validated, and the Certificate has been paid for by the owner

2. Select Submitted from the menu on the left to view all your submitted Records of Inspection.





3. To view a specific record, select the drop arrow, and select the “view” option to view each Record of Inspection.

Record of Inspection

Submitted ▾

Installation Address ↑	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	ROI Submission Date	Certificate Due Date	Validation Status
65000629	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000090	Pass	6/15/2018 12:32 PM		Submitted
65000630	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000091	Pass	6/15/2018 12:32 PM		Submitted

Dropdown menu for Validation Status: View, Validate

4. When your record opens, validate the information in the following sections, then select the “x” in the top right corner to close the record.
- Customer Information
 - Inspection Information
 - Equipment Information

Record of Inspection

View Details ✕

Customer Information

Owner / Operator Name *

Inspection Information

Insurer Name *

Inspector Name *

Inspection Agency Name

TSSA Issued Inspector Certificate Number (COC) *

Inspection Date *

5/12/2018

Inspection Type *

External



Inspection Status *
Pass

Code Violations

Equipment Information

TSSA ID *
65000090

Installation Address - Postal Code *
L1R 2H4

MAWP (psi) *
100.00

2.2 Validate Your Record of Inspection

In the Portal, a user has the option to validate a Record of Inspection one at a time, select a few as validated, or select all records in a submitted status as validated. Below are the three options to update your records as “Validated”. Move to one of the following sections for instructions:

- Option A: Select a Single Record for Validation
- Option B: Select Multiple Records for Validation
- Option C: Select All Records for Validation

Option A: Select a Single Record for Validation

5. Select the drop arrow at the end of the record to be validated. Then select the “Validate” button.

Record of Inspection

Submitted Search

Installation Address ↑	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	ROI Submission Date	Certificate Due Date	Validation Status
65000629	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000090	Pass	6/15/2018 12:32 PM		Submitted ▼
65000630	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000091	Pass	6/15/2018 12:32 PM		Submitted View Validate


Option B: Select Multiple Records for Validation

6. Select the “Bulk Validate” button to update multiple records as validated.

Record of Inspection

Submitted-

Installation Address ↑	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	ROI Submission Date	Certificate Due Date	Validation Status
65000629	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000090	Pass	6/15/2018 12:32 PM		Submitted <input type="button" value="v"/>
65000630	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000091	Pass	6/15/2018 12:32 PM		Submitted <input type="button" value="v"/>



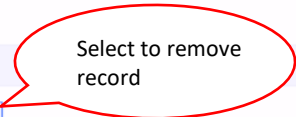
7. In the pop up window, select multiple records to update to a “Validated” status. Select the “Add” button to complete the update.

Lookup Records

Record of Inspection Number ↑	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	Created On	Authorization Expiry Date (Certificate of Inspection)	Status Reason
✓ 65000629	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000090	Pass	6/15/2018 12:32 PM		Submitted
✓ 65000630	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000091	Pass	6/15/2018 12:32 PM		Submitted

Selected Records

65000629 ✕ 65000630 ✕

 Select to remove record

Note: To de-select a record, select the record number, under the “Selected Records” list.



8. Confirm the list of records chosen, then select the “Execute” button to complete the update.

Bulk Validate

Records of Inspection(s)

Search

Record of Inspection Number ↑	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	Created On	Authorization Expiry Date (Certificate of Inspection)	Status Reason
65000629	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000090	Pass	6/15/2018 12:32 PM		Submitted <input type="button" value="v"/>
65000630	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000091	Pass	6/15/2018 12:32 PM		Submitted <input type="button" value="v"/>

Option C: *Select All Records for Validation*

9. To update all your records of inspection that are in a “Submitted” status to a “Validated” status, select the “Validate All Submitted” button. **Once this button is selected. All applicable records displayed will be updated to “Validated”.**

Record of Inspection

Search

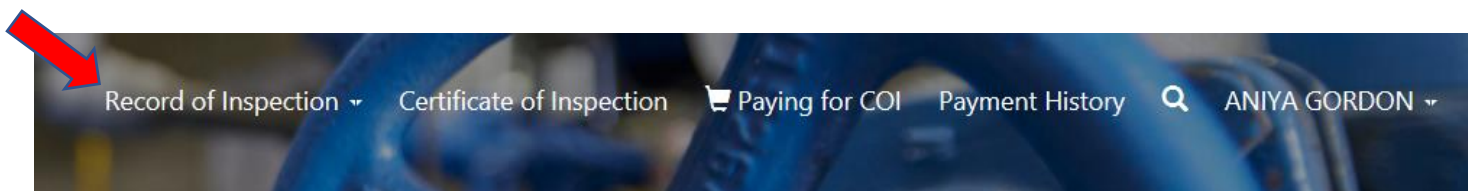
Installation Address ↑	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	ROI Submission Date	Certificate Due Date	Validation Status
65000629	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000090	Pass	6/15/2018 12:32 PM		Submitted <input type="button" value="v"/>
65000630	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000091	Pass	6/15/2018 12:32 PM		Submitted <input type="button" value="v"/>



3.1 Add your Record of Inspection to the Shopping Cart for Payment

The Portal provides the flexibility to pay for one, many or all your eligible Records of Inspection (ROI) in a single transaction through a selection process. For instructions on adding your ROIs to the shopping cart for payment, follow the steps below.

1. Select “Record of Inspection” from the “Record of Inspection” top menu to view your Validated records of Inspection.



2. To view your Records of Inspection that are eligible for payment select the “Validated” from the Status Menu on the left.

Record of Inspection

Validated
Submitted
Paid

Q

	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	ROI Submission Date	Certificate Due Date	Validation Status	Work Order	Work Order In Cart	
65000628	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000088	Pass	6/15/2018 12:32 PM		Valid	20326	Yes	▼
65000629	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000090	Pass	6/15/2018 12:32 PM		Valid	20331	No	▼
65000630	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000091	Pass	6/15/2018 12:32 PM		Valid	20330	No	▼



3. Select the “Add to Cart” button from the drop arrow for each certificate you would like to pay for. Each record added to the cart will move forward for payment of the

Record of Inspection

Validated

Installation Address	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	ROI Submission Date	Certificate Due Date	Validation Status	Work Order	Work Order In Cart
65000628	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000088	Pass	6/15/2018 12:32 PM		Valid	20326	Yes
65000629	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000090	Pass	6/15/2018 12:32 PM		Valid	20327	No
65000630	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000091	Pass	6/15/2018 12:32 PM		Valid	20330	No

All records selected for payment will have “Yes” displayed under the “Work Order In Cart” Column

4. Select the “Paying for COIs” button to proceed.

Record of Inspection

Validated

Installation Address	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	ROI Submission Date	Certificate Due Date	Validation Status	Work Order	Work Order In Cart
65000628	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000088	Pass	6/15/2018 12:32 PM		Valid	20326	Yes
65000629	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000090	Pass	6/15/2018 12:32 PM		Valid	20331	Yes
65000630	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000091	Pass	6/15/2018 12:32 PM		Valid	20330	No

[Paying for COI](#)

- The system will then display all the records in your shopping cart.



5. Confirm your list of records for payment is correct, then select the “Request Certificate(s)” button to proceed to the checkout.

Paying for COI

Work Orders

Search

Work Order Number	Record of Inspection	Asset ID	System Status	Work Order Type	Primary Job Type	Total Sales Tax	Total Amount	Created On ↑
20331	65000629	65000090	Open - Unscheduled	COI	Certification of Inspection - BPV - 1 Year	\$0.00	\$40.00	6/17/2018 9:22 AM
20326	65000628	65000088	Open - Unscheduled	COI	Certification of Inspection - BPV - 1 Year	\$0.00	\$40.00	6/15/2018 12:59 PM

[Cancel Shopping Cart](#)

[Request Certificate\(s\)](#)



3.1 Payment Checkout

In the Portal, a user has two payment methods for their Certificate of Inspection (COI):

- Credit Card
- Invoice

1. Validate your Total Amount Owning and proceed to the Payment option section under the “How would you like to pay?”.

Checkout

1 Welcome 2 Pay by Credit Card 3 Summary

Name
ORD-0001065J3W38

Status Reason
Unpaid

Currency
Canadian Dollar

Total HST
\$0.00

Total Amount
\$80.00

Work Orders

Search

Work Order Number	Record of Inspection ↑	Asset ID	System Status	Work Order Type	Primary Job Type	Total Sales Tax	Total Amount	Created On
20326	65000628	65000088	Open - Unscheduled	COI	Certification of Inspection - BPV - 1 Year	\$0.00	\$40.00	6/15/2018 12:59 PM
20331	65000629	65000090	Open - Unscheduled	COI	Certification of Inspection - BPV - 1 Year	\$0.00	\$40.00	6/17/2018 9:22 AM

Move to one of the following sections for payment instructions:

- Option A: Pay by Credit Card
- Option B: Invoice



TECHNICAL STANDARDS
& SAFETY AUTHORITY

Option A: Pay by Credit Card

2. Select "Credit Card" as your payment method

How would you like to pay?

Payment Method *

Credit Card Invoice



Next

3. Select the "Next" button to proceed.
4. Enter your Credit Card information in the secured payment window, then select the "Process Transaction" button. All transactions are in Canadian Dollars (CAD).

1 Welcome ✓ 2 Pay by Credit Card 3 Summary

Item Details				
Description	Product Code	Quantity	Price	Subtotal
65000088 COI - BPV - 1 Year	20326	1	\$40.0000	\$40.0000
65000090 COI - BPV - 1 Year	20331	1	\$40.0000	\$40.0000
				HST: \$0.0000
				Total: \$80.0000

Payment Details

Transaction Amount: \$80.0000 (USD)

Order ID: ORD-0001065J3W3B

Please complete the following details exactly as they appear on your card.
Do not put spaces or hyphens in the card number.

Cardholder Name*:

Card Number*:

Expiry Date (MMYY)*:

Card Security Code*:

Click 'Process Transaction' to charge your card. Only click the button once. Using the 'Back', 'Refresh' or 'Cancel' button after you press the 'Process Transaction' button will not stop the transaction from being processed and may result in a double charge.

Note: To cancel a transaction select the "Cancel Transaction" button above



5. The system will display a payment record page. Review the transaction details and press the “Complete” button to complete the transaction.
6. The system will then take the user to the Payment History page. On this page, a user can view all their transactions that were paid or cancelled.

Paid		Search				
	Total Amount	Payment Method	Date Stamp	Time Stamp	Modified On ↑	
ORD-0001065J3W3B	\$80.00	Credit Card	2018-06-17	10:09:52	6/17/2018 10:10 AM	▼
ORD-0001064N2B2N	\$320.00	Credit Card	2018-06-15	12:55:46	6/15/2018 12:56 PM	▼
ORD-0001037D4Z3H	\$45.20	Credit Card	2018-05-23	08:52:32	6/15/2018 12:13 PM	▼
ORD-0001041P4P6Y	\$180.80	Credit Card	2018-05-23	11:29:55	6/15/2018 12:13 PM	▼
ORD-0001044W6W6R	\$9,040.00	Credit Card	2018-05-24	10:47:22	6/15/2018 12:13 PM	▼
ORD-0001063V5F7M	\$120.00	Credit Card	2018-06-15	11:24:53	6/15/2018 11:25 AM	▼
ORD-0001060H6HOG	\$120.00	Credit Card	2018-06-14	09:51:37	6/14/2018 9:52 AM	▼
ORD-0001058Y0H9G	\$40.00	Credit Card	2018-06-13	19:41:16	6/13/2018 7:41 PM	▼
ORD-0001045F0R0K	\$90.40	Credit Card	2018-05-24	12:31:11	5/24/2018 12:31 PM	▼
ORD-0001043M9B0X	\$45.20	Credit Card	2018-05-23	14:36:07	5/23/2018 2:36 PM	▼

< 1 2 >

7. To view each transaction, select the order number link, or select “View Details” from the drop arrow menu.
8. For each transaction selected, the associated pdf. Invoice will be available to be viewed, saved, or printed.
 - a. Select the “Reload Files” button if your pdf invoice is not displayed.



4.1 View Certificate of Inspection (COI)

The Certificate of Inspection is generated once payment has been received. If you have completed a successful credit card transaction directly through the portal, your COI will be available right away. When an invoice has been issued, the COI will be available upon receipt and process of the payment in the Technical Standards and Safety Authority office. To view your Certificates of Inspection, follow the steps below:

1. Select the “Certificate of Inspection” button from the top menu to view your Certificates



2. The system will display all your previously issued certificates.
3. To view an electronic record of your certificate, select the order number link, or select “View Details” from the drop arrow menu.
4. To view the associated pdf. Of your Certificate, select the pdf from the list based on the Authorization number. A user will be able to view, save, or print their COI.

Certificate of Inspection

#	Download File	Last Modified On
1	65000004-4.pdf	2018-06-17 2:11:02 PM
2	65000020-1.pdf	2018-06-17 2:11:02 PM
3	65000007-6.pdf	2018-06-15 4:56:45 PM
4	65000010-6.pdf	2018-06-15 4:56:43 PM
5	65000015-5.pdf	2018-06-15 4:56:41 PM
6	65000004-3.pdf	2018-06-15 4:56:41 PM

[Reload Files](#)

Search

Auth #	Version Number ↑	TSSA ID	Installation Address	Payment Status	Modified On ↑
65000020	1	BPV-7	131 Timber Mill Ave Whitby ON L1R 2H4 Canada	Active	6/17/2018 10:11 AM ▼
65000004	4	BPV-5	131 Timber Mill Ave Whitby ON L1R 2H4 Canada	Active	6/17/2018 10:11 AM ▼
65000007	6	BPV-10	131 Timber Mill Ave Whitby ON L1R 2H4 Canada	Active	6/15/2018 12:56 PM ▼