Technical Standards and Safety Authority

Owner/Operator Portal Training Documentation

Owner Portal Training Document

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Overview

This training document will help users navigate through the Owner Portal App and complete functionalities such as: Validating ROIs, paying for certificates of Inspections, and submitting cancellations of insurers.

Prerequisites:

- User has redeemed their code and completed their portal registration form.

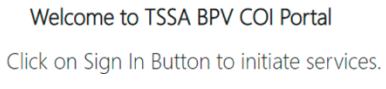
Step-by-step Instructions

Step	Task

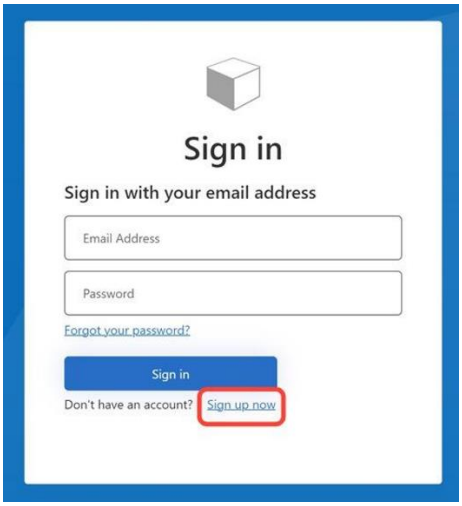
Signing into Portal

1. Open the link to the Owner Portal App: "https://ownerseservices.tssa.org "

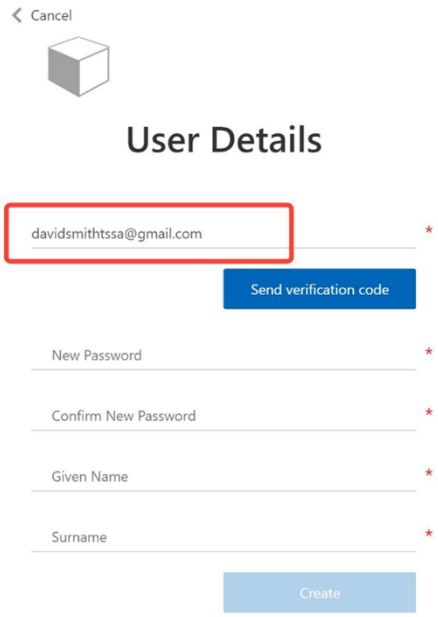
2. Click on the Sign- in button.



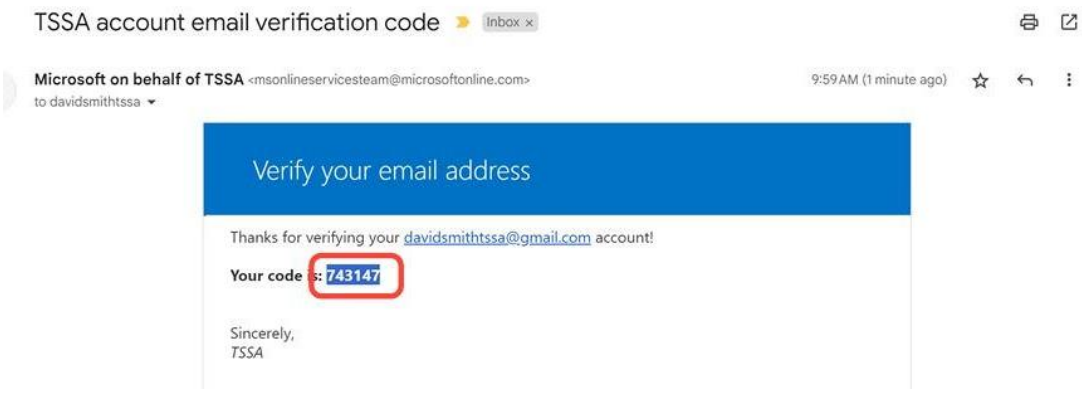
3. Click the “**Sign up now**” hyperlink.



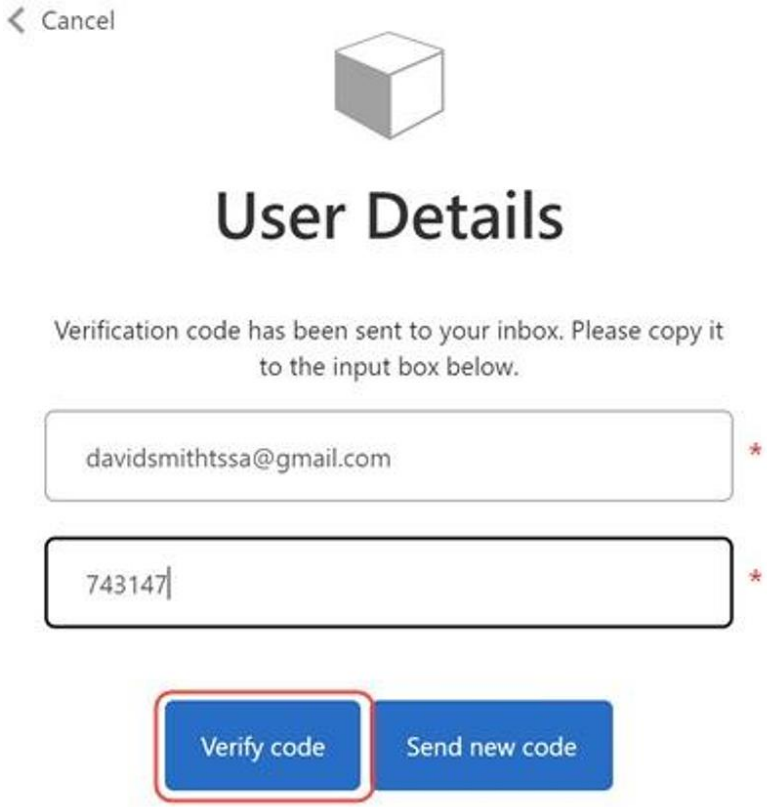
4. Enter the “Email Address” you want to use to register yourself and click the "Send Verification Code" button. You will receive a notification.



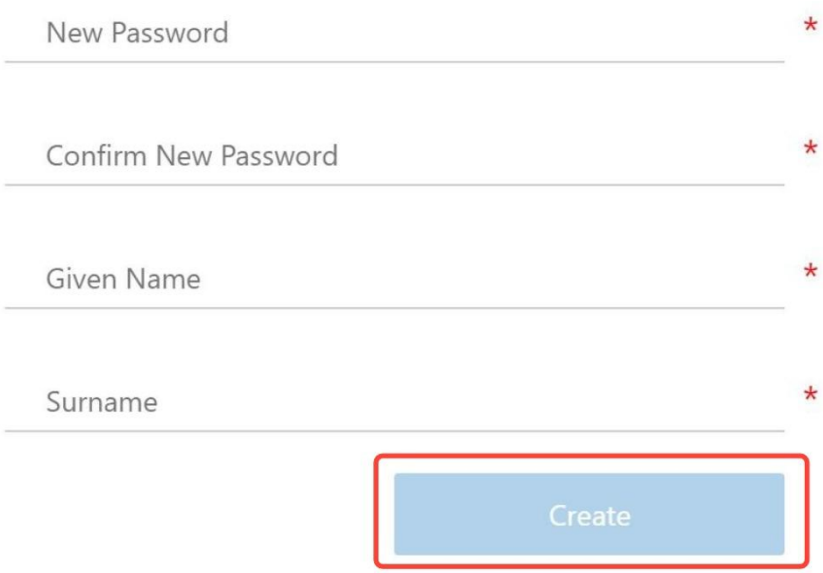
5. Check your email for the verification code and copy it.



6. Enter or paste the "**Verification Code**" and click the "**Verify Code**" button. A new screen will appear to help you continue with the registration process.



7. Complete the following fields by entering a password and given names. All fields with an asterisk (*) are mandatory. Click the "**Create**" button when you're done.

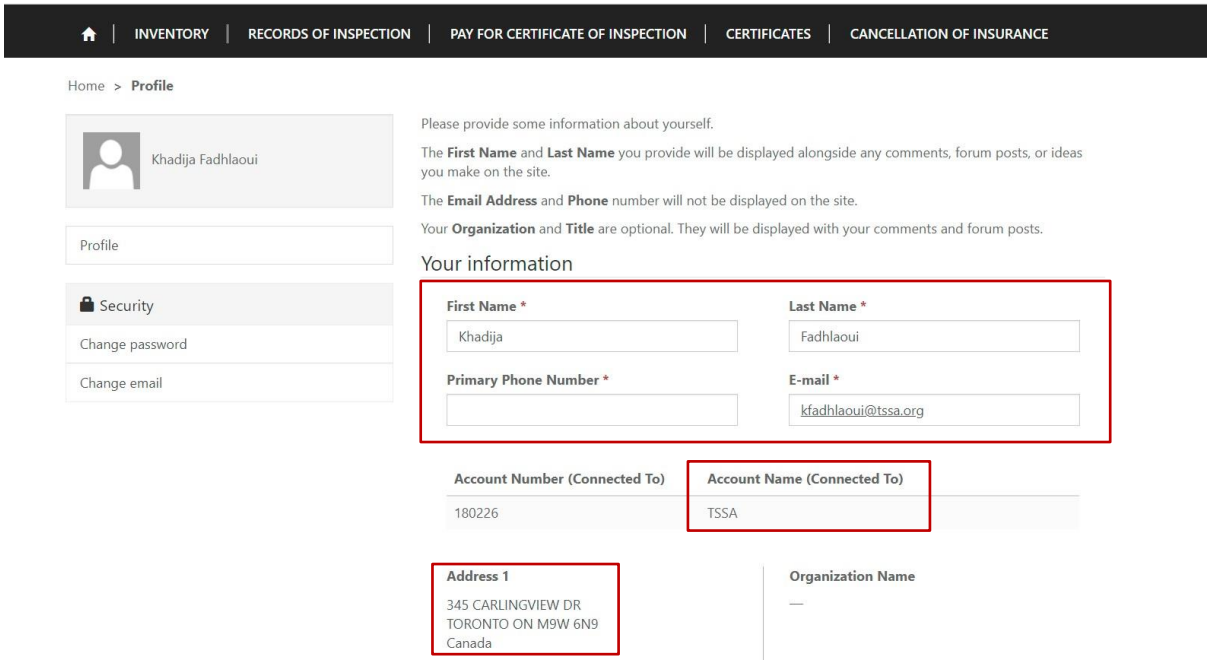


Profile Page

8. Select the Profile option from your Username Menu in the top right corner.

9. To ensure TSSA has the correct information review your profile page and validate the following contact details.

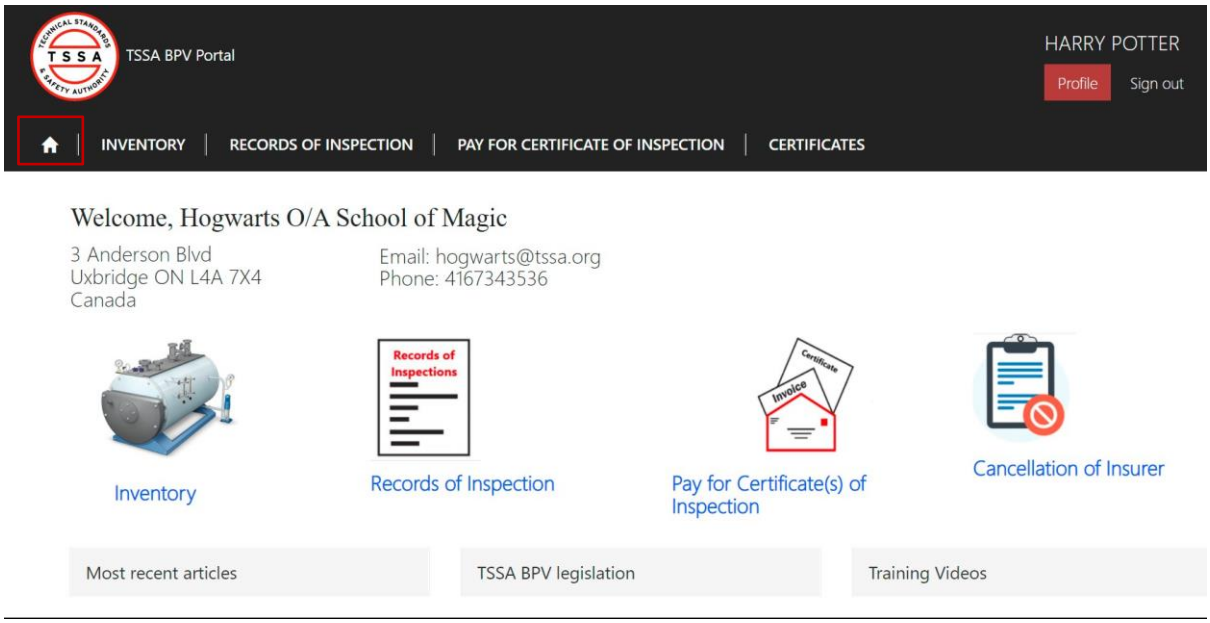
- *Name, Phone, and Email address fields are editable. Changes to these fields will automatically update the TSSA database.*



Home Page

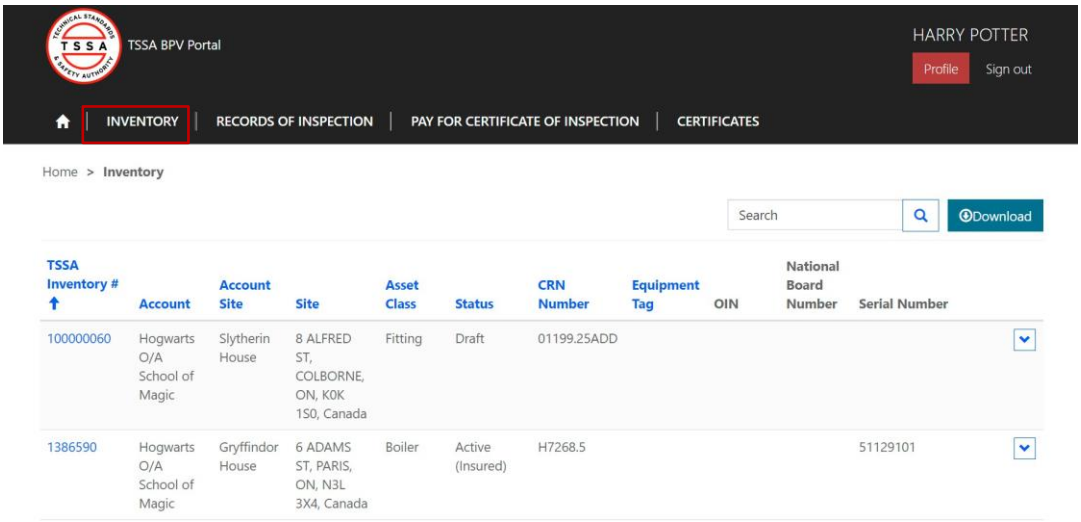
The home page will be displayed to users when clicking on the “Home” tab located at the top menu bar.

> The home page displays quick links to other pages on the portal



Inventory Page

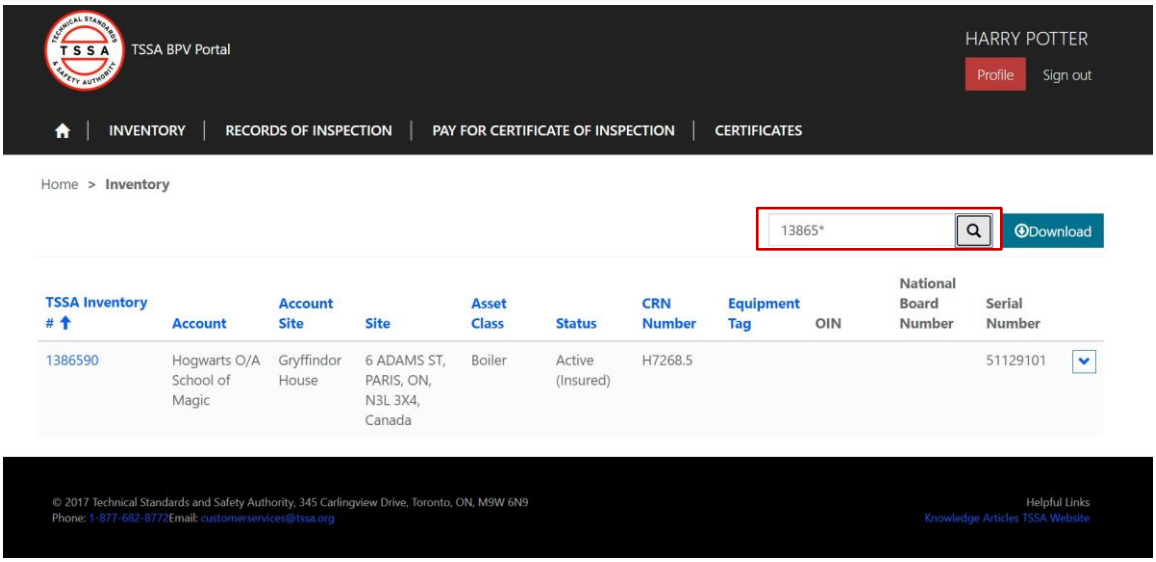
10. The inventory page displays a list of Inventories that the portal user is associated with in the TSSA Database.



Searching for Inventories

Use the quick search bar at the top right side to find inventories.

- The *Asterisk symbol (*) is used as a wild card in the Portal app. Use this to maximize your search in the database.*

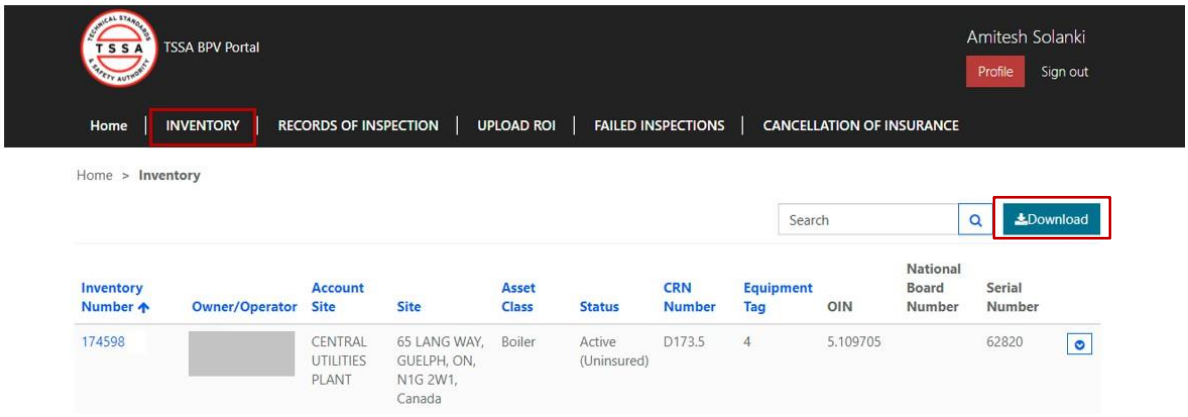


Downloading List of Inventories

11. To view a full list of your inventories, click on the Download button located on the far right side of the screen.
    > System will download an Excel list of inventories.

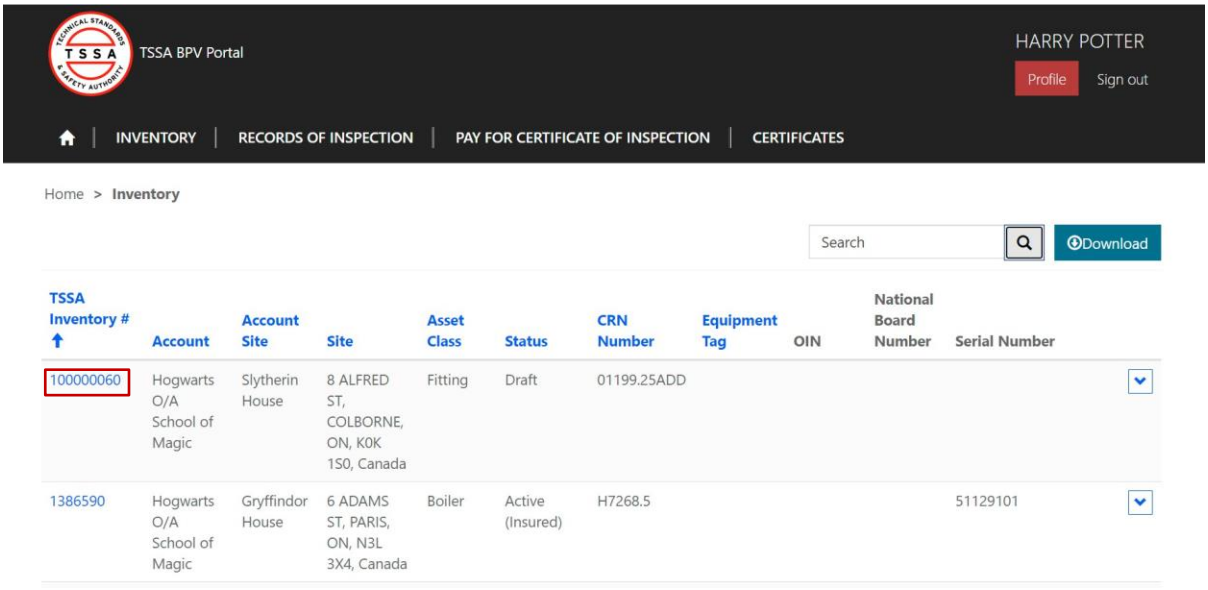
    Users can use the Excel file to filter by site or owner/operator name

12.

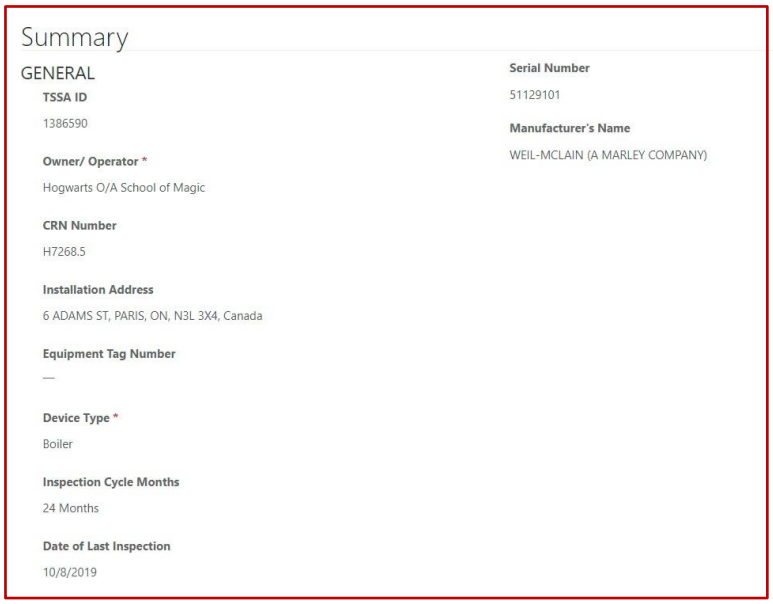


View Details of Inventory

13. Click on the inventory Number (TSSA UID) to see additional technical information on the device.
    > Portal will direct the user to the detail information page

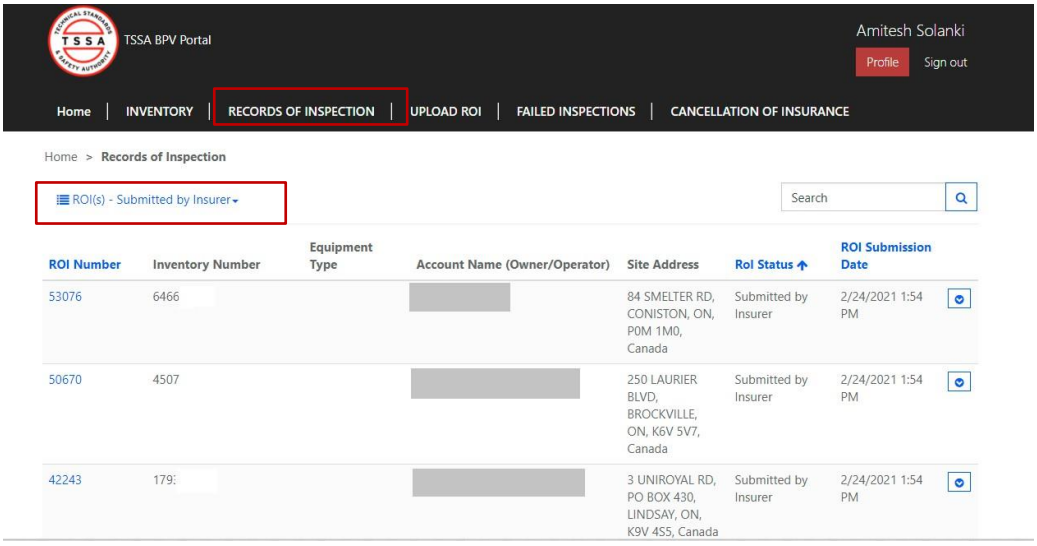


14. Review details of Inventory.



Records of Inspection Page

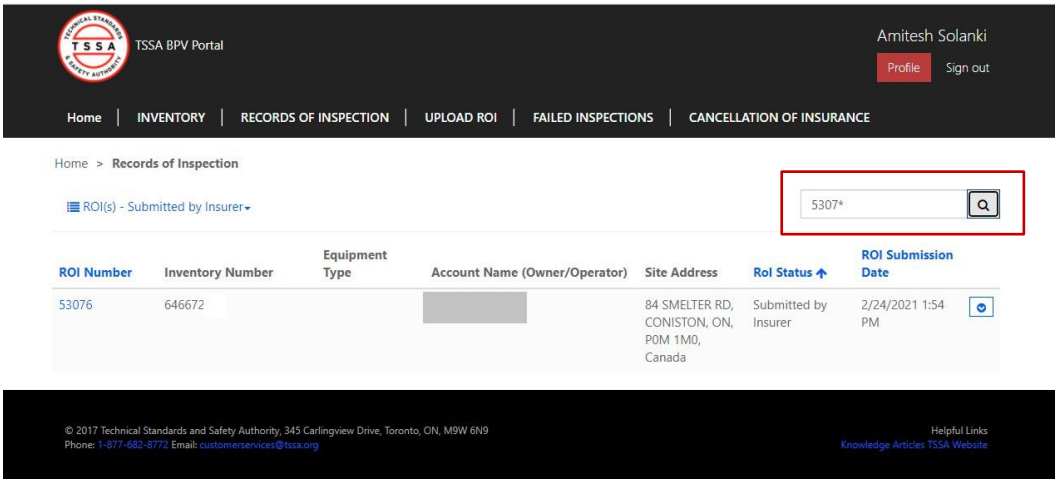
15. To view records of inspections submitted click on the Records of Inspection tab.
    > System will display records in “submitted by insurer” status on the default page



Searching Records of Inspections

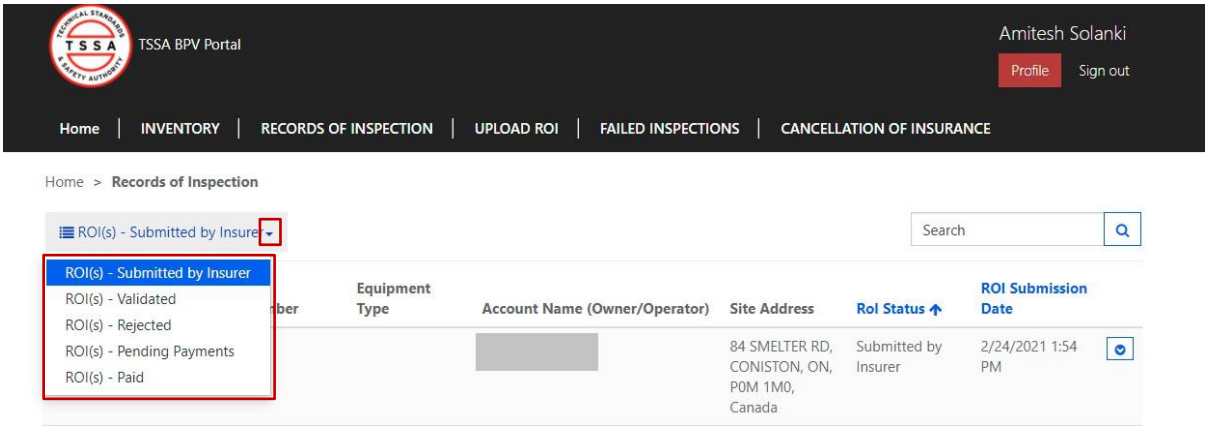
16. Use the quick search bar at the top right side to find ROI’s.

- The *Asterisk symbol (*) is used as a wild card in the Portal app. Use this to maximize your search in the database.*



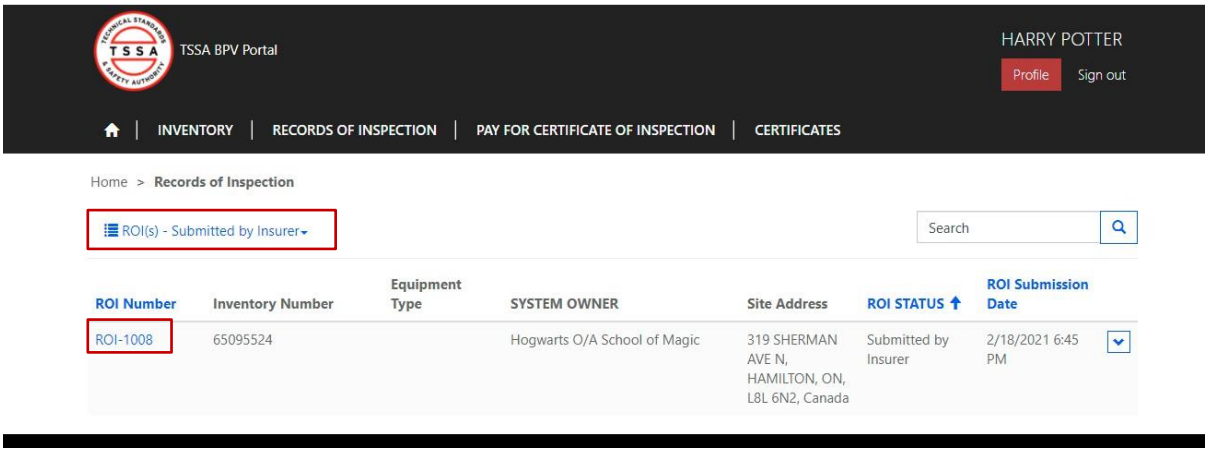
View Records of inspection in different statuses

17. To view different statuses of ROI, click on the drop-down arrow next to Submitted by Insurer and select the value from the list of values.



Validate Records of Inspection

Under Submitted by Insurer view, click on the ROI number to open the record.



18. Review the details of the ROI

Home > **Record of Inspection**

Approve ROI | Reject ROI

Record of Inspection

ROI Number
ROI-1008

ROI Status *
Submitted by Insurer

ROI Submission Date
2/18/2021 6:45 PM

Date of Validation
—

Authorization
—

Customer Information

ROI Submitter
Hogsmeade Insurance A Div Of All-wizarding Insurance

Owner/Operator
Hogwarts O/A School of Magic

Contact Name
harry potter

Contact Phone Number
—

Contact Email Address
hpotter@tssa.org

Inspection Information

Insurer : *
Hogsmeade Insurance A Div Of All-wizarding Insurance

Inspector Name
ISHTIAQ A TARAR

Inspection Type *
External

ROI Inspection Status
Pass

Inspection Agency
850400 ONTARIO LIMITED O/A GTT ONSET

TSSA Issued Inspector Certificate Number (CoC)
000266480

Inspection Date *
2/9/2021

Inventory Information

TSSA ID *
65095524

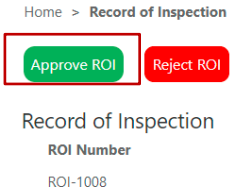
Asset Class *
Pressure Vessel

CRN Number
L4988.5

Serial Number
4014

OIN
—

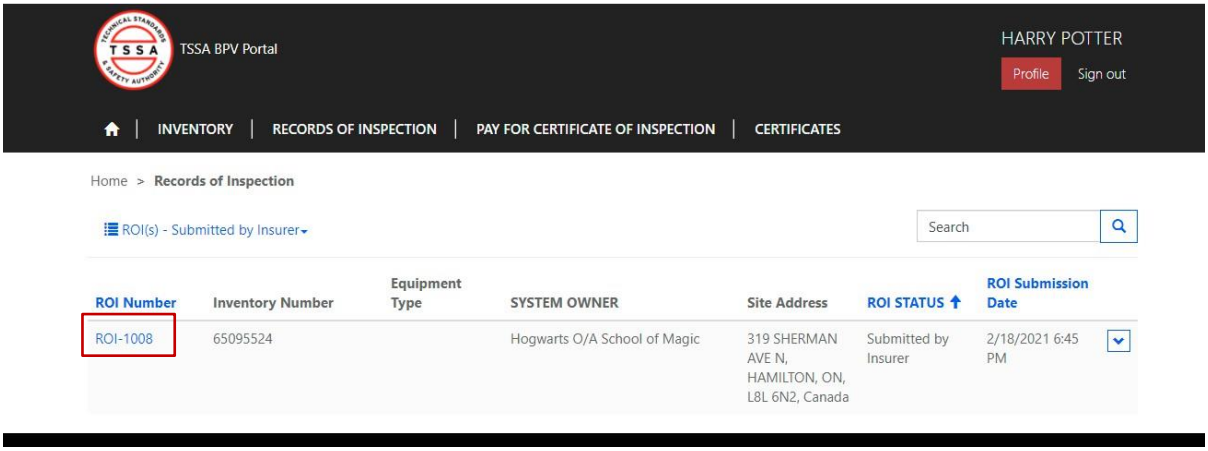
19. Click on the Approve ROI button located at the top of the form, if the information displayed on the form is correct.
    > System will auto-update the status of the ROI to Validated and move the record to Validated view.
    > Within Minutes the system will move the Validated record to Pending Payment View and will automatically move to the Pay for Certificate of Inspection page



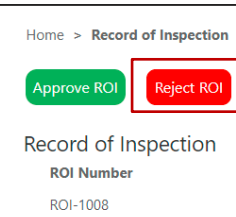
20.

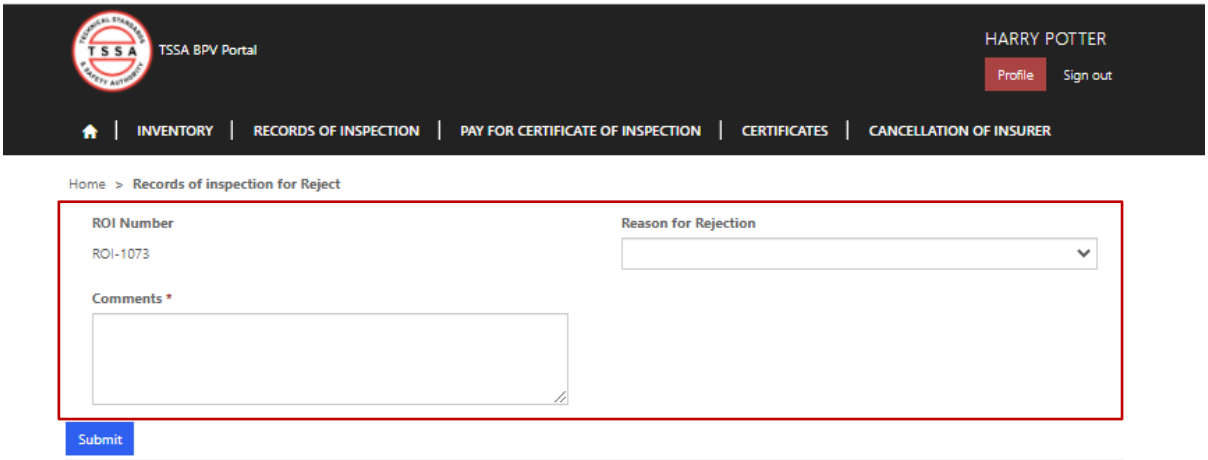
Rejecting Records of Inspection

21. Click on the ROI Number displayed under Submitted by Insurer view
    > System will open the ROI record

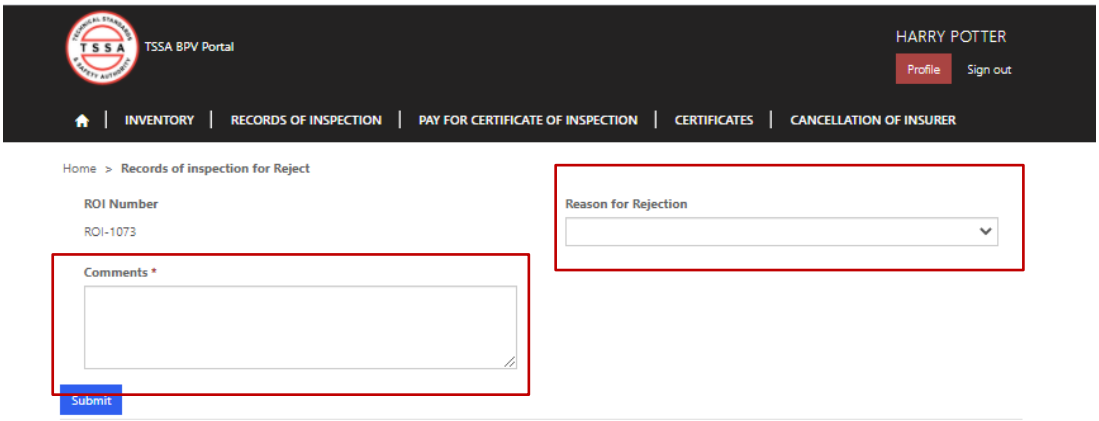


22. Review the information displayed on the record. Click on the Reject ROI button located at the top of the form.
    > System will trigger the Rejection Reason Form (screen below)



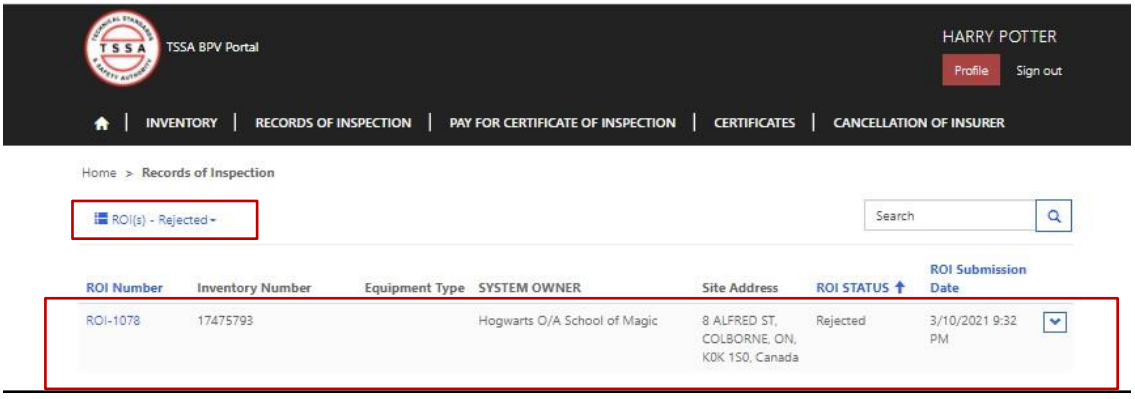


23. Complete the Fields on Form



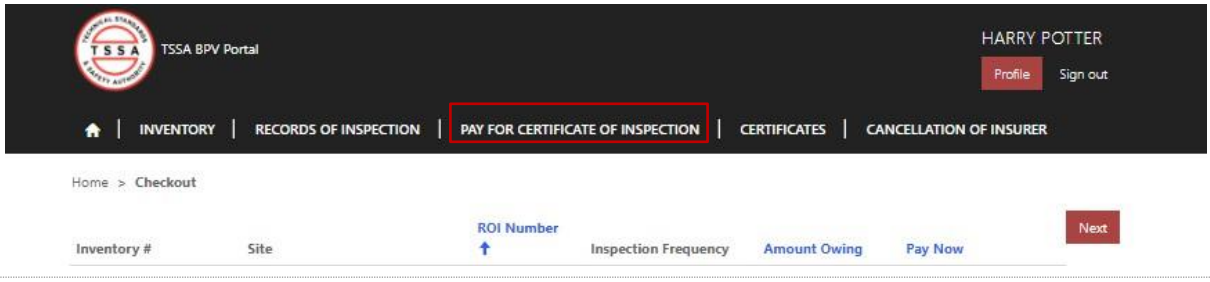
24. Click on the Submit button when fields are completed.
    > System will automatically update the status on the Record

25. Click on the ROI view and select “ROI(s) – Rejected”. The system will display the record in this view

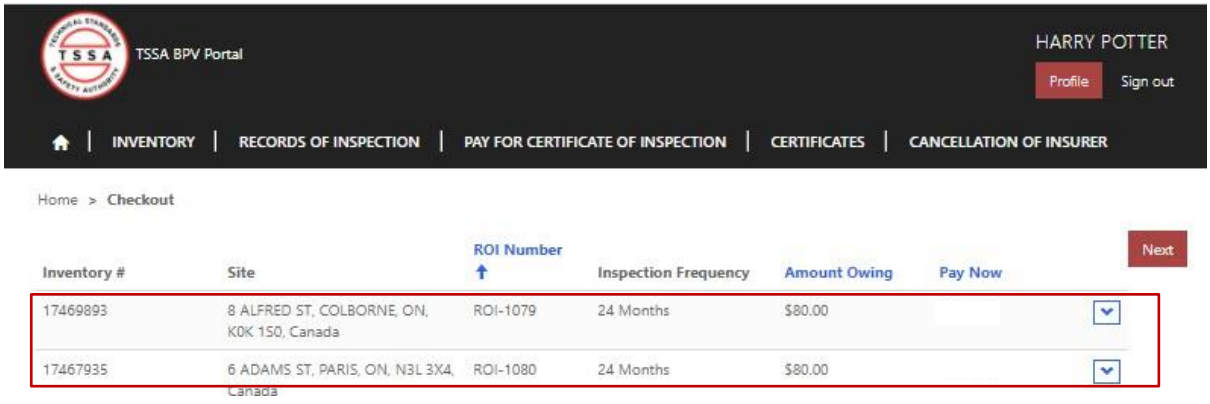


Pay for Certificate of Inspection

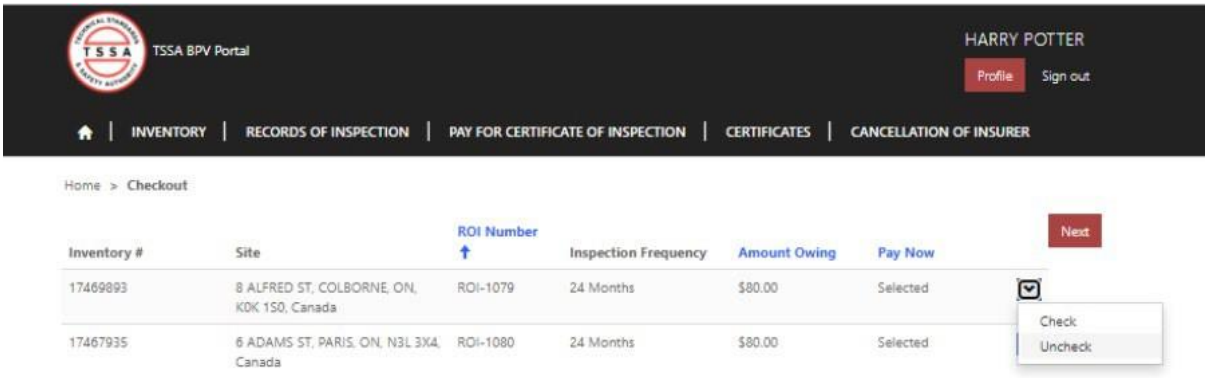
26. Click on the Pay for Certificate of Inspection tab on the menu bar



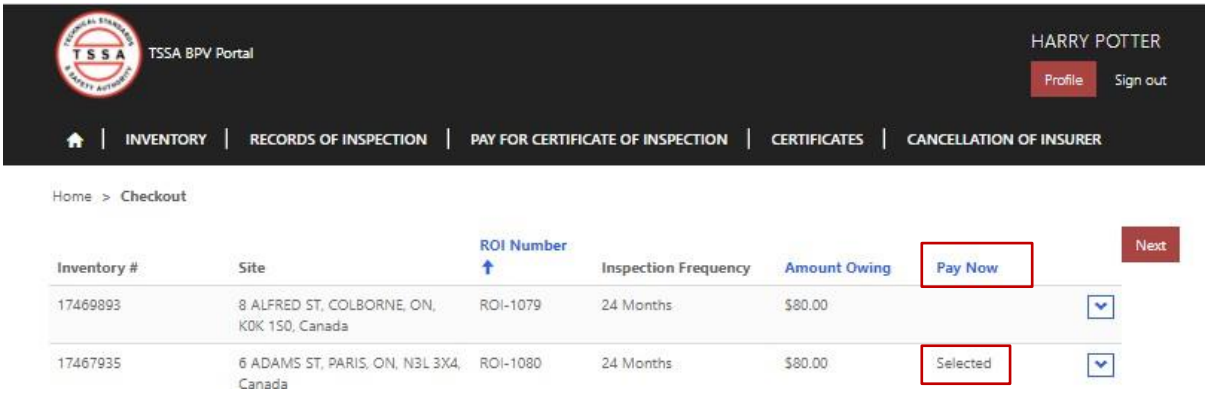
27. The system displays records that are pending Payment



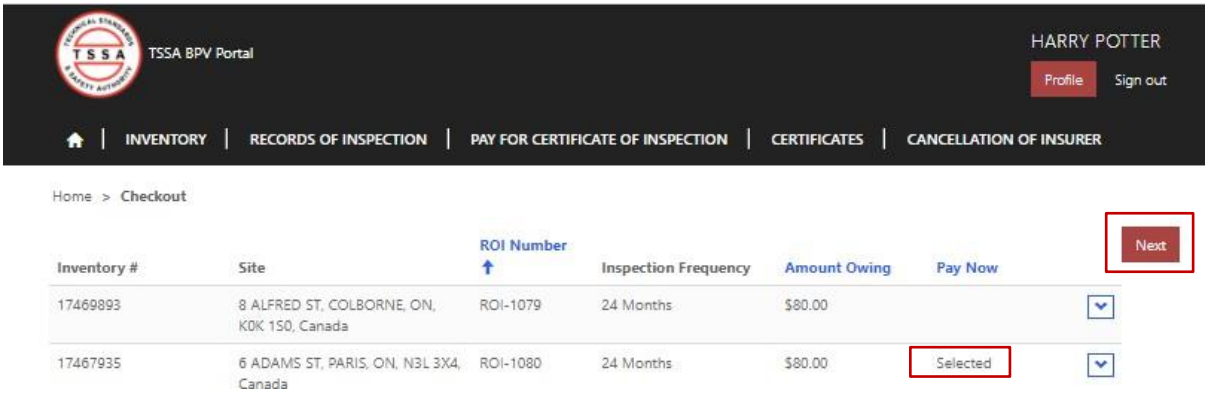
28. To add Checkout items, click on the drop-down arrow and select “check”



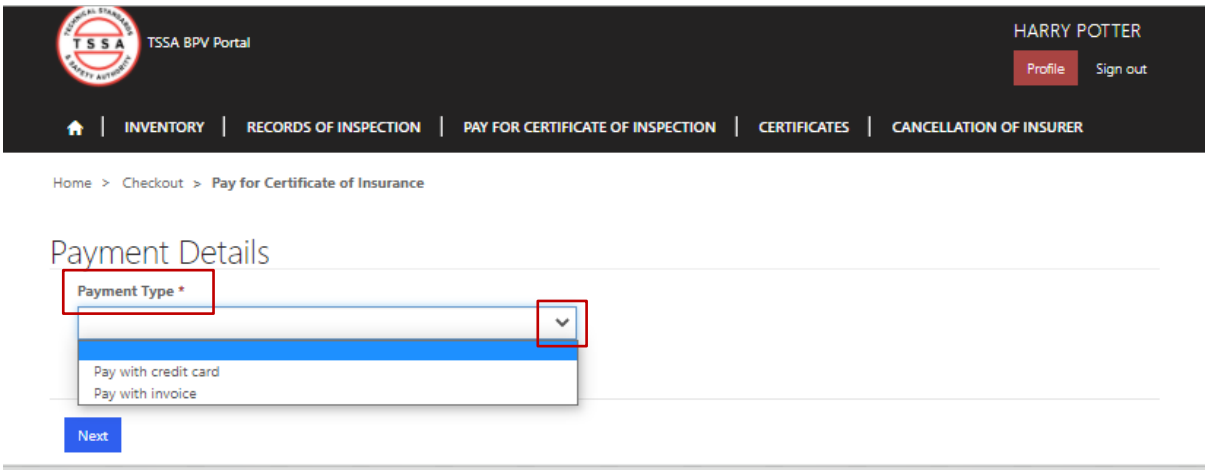
28. The system will add the value “Selected” under the Pay Now column.



29. Click on Next button to pay for the items selected.
> System will move to Payment Details Page



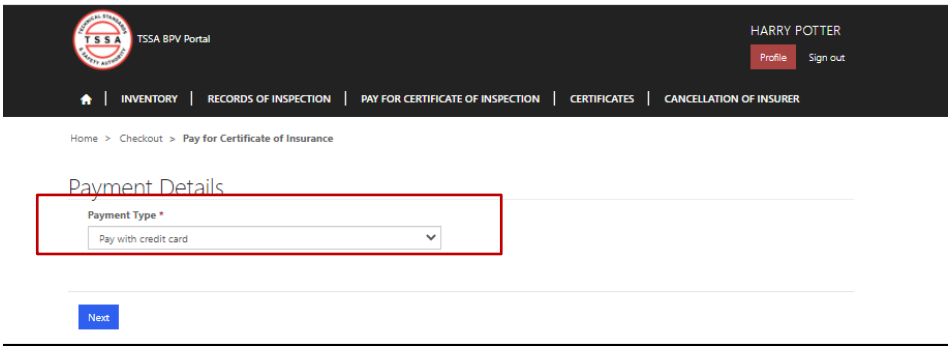
30. Select Payment Type by clicking on the drop-down arrow displayed on the field



Pay with a Credit Card

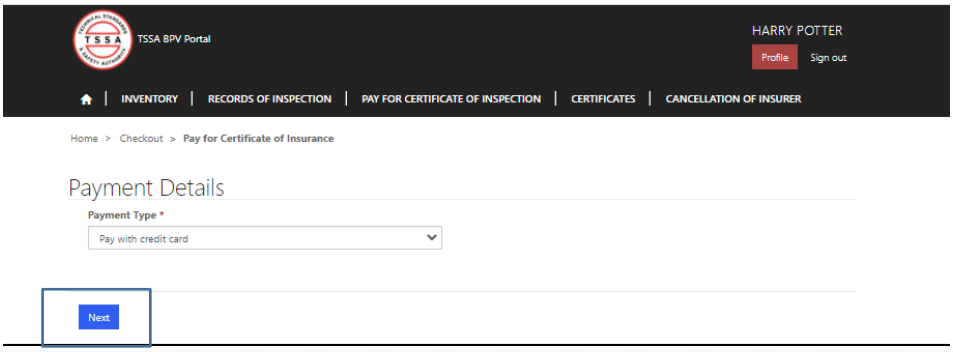
31. Select Pay with Credit Card as the Payment Type

- *All records selected to be paid by Credit Card must be paid by 10 pm that evening. Otherwise, the payment type will automatically default to the invoice option.*

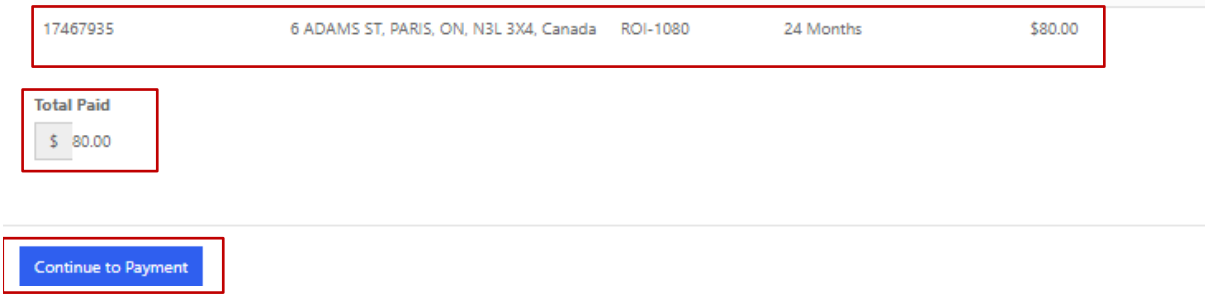


32. Click on the “Next” button.

> System will display record(s) selected with the Amount Owing

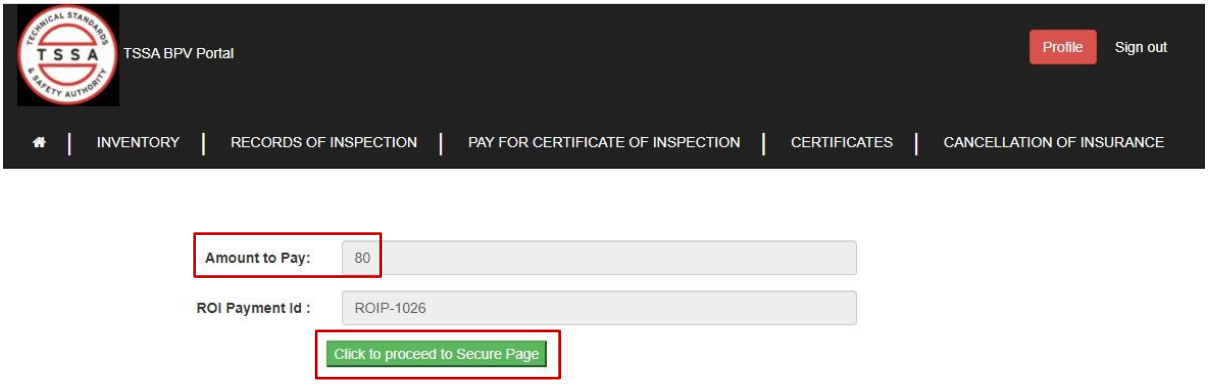


33. Review records displayed and the total amount owing. Click on the Continue to Payment button to proceed to the next page.



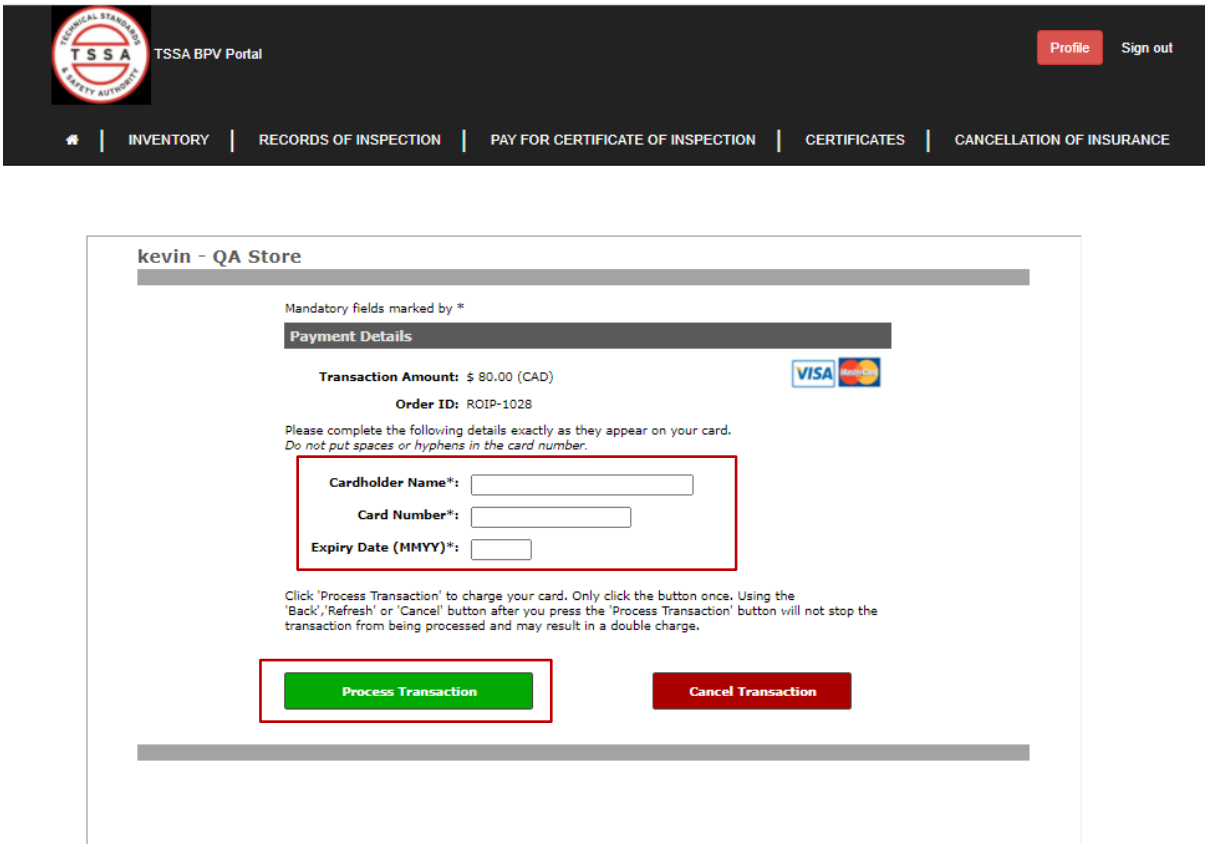
34. Validate system displays the correct Amount to Pay and click on the green button “click to proceed to Secure Page.”

> System will direct users to the Moneris Credit Card Payment page



35. Enter your credit card information and click on the Process Transaction button.

> System will process payment and direct the user to their confirmation page



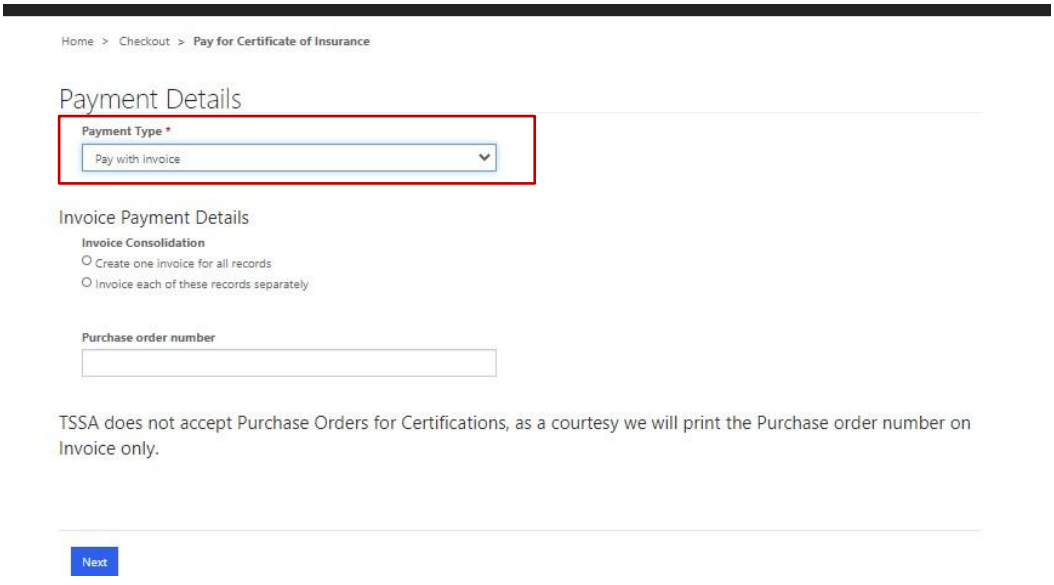
36. The system will display Payment Confirmation. You may save/print this page for reference.
    > System will automatically update the ROI status to Paid

Payment Accepted

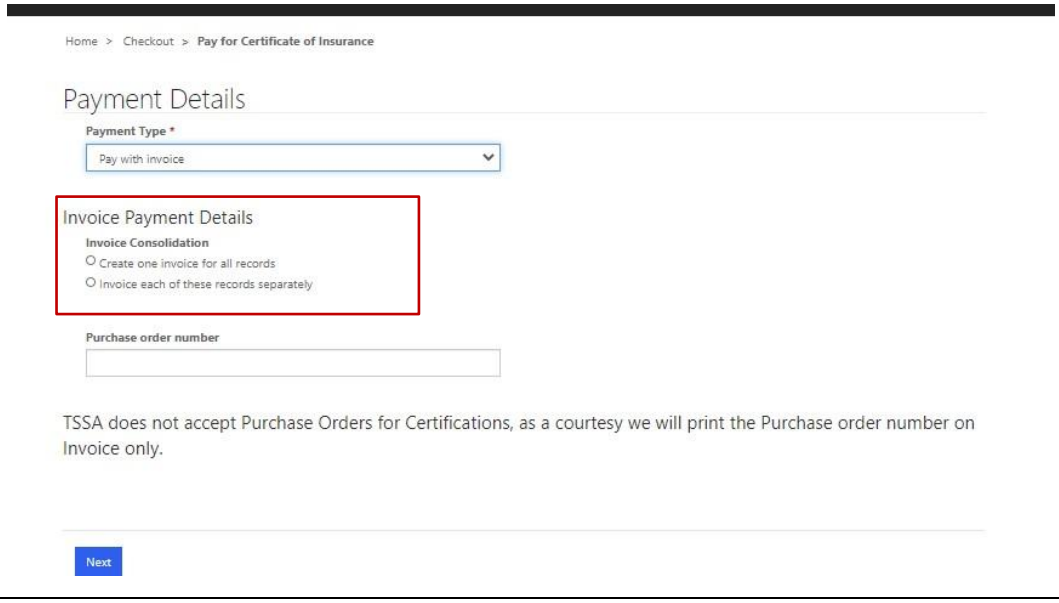
Key	Value
response_order_id	ROIP-1026
date_stamp	2021-03-10
time_stamp	22%3A12%3A05
bank_transaction_id	660188540
charge_total	80.00
bank_approval_code	7170
response_code	027
iso_code	01
message	APPROVED++++++++++*++++++++++++++++++%3D
trans_name	purchase
cardholder	4242424242
f4l4	4242***4242
card	V

Pay with Invoice

38. Select Payment Type “Pay with Invoice”
    > System will auto-display the Invoice payment Details field

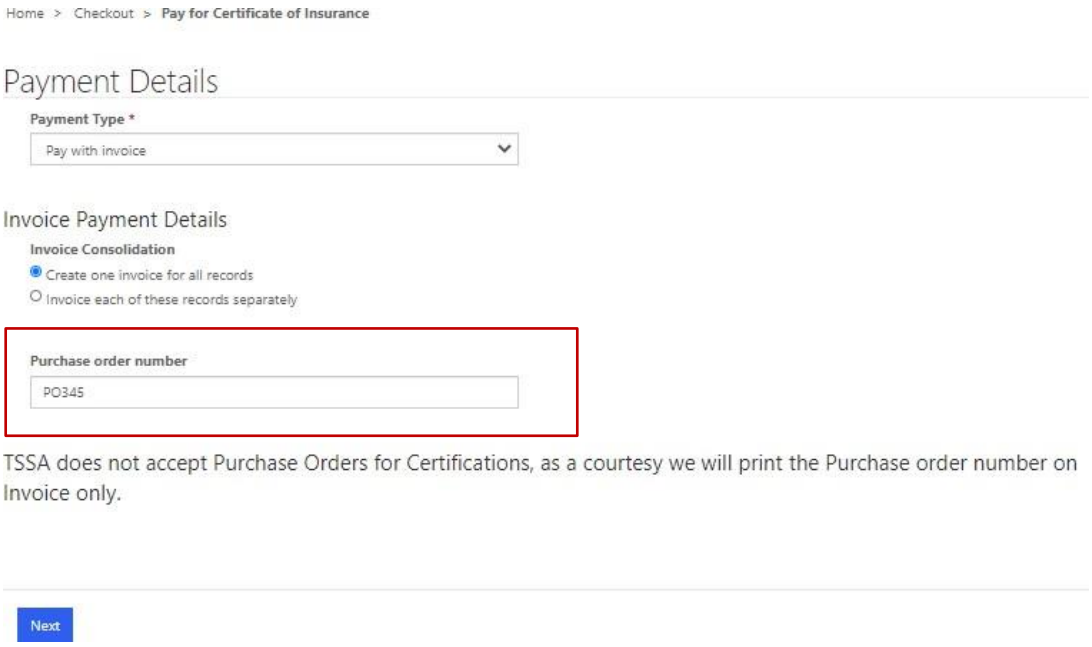


39. Select an option under Invoice Payment Details



40. If applicable, enter a Purchase Order Number

- *TSSA does not accept Purchase Orders for Certificates. This option is a courtesy that will be printed on invoices only.*

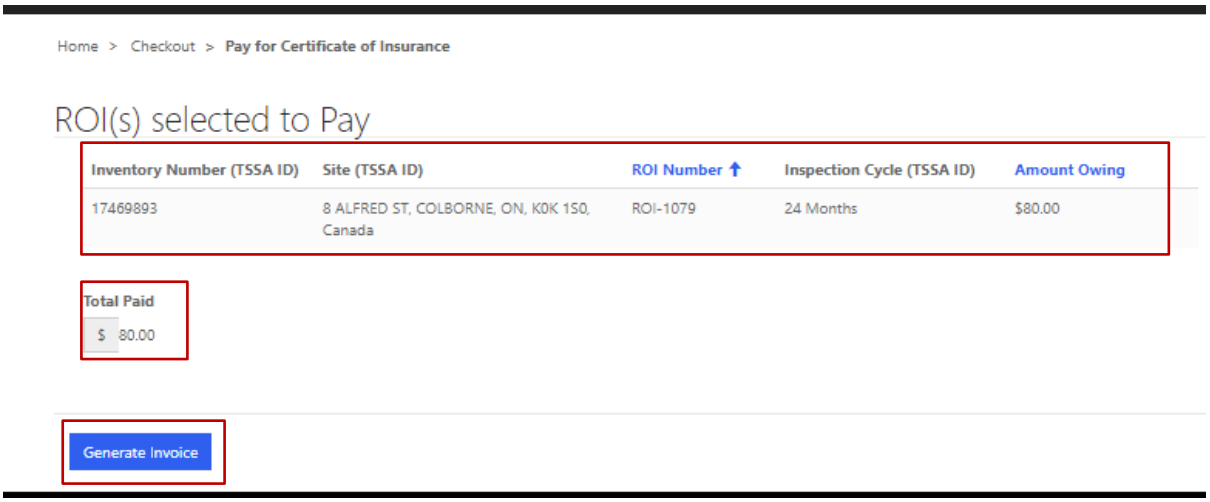


41. Click on the Next button, at the bottom of the form.

42. The validation system displays the Record(s) selected and the Total amount displayed.

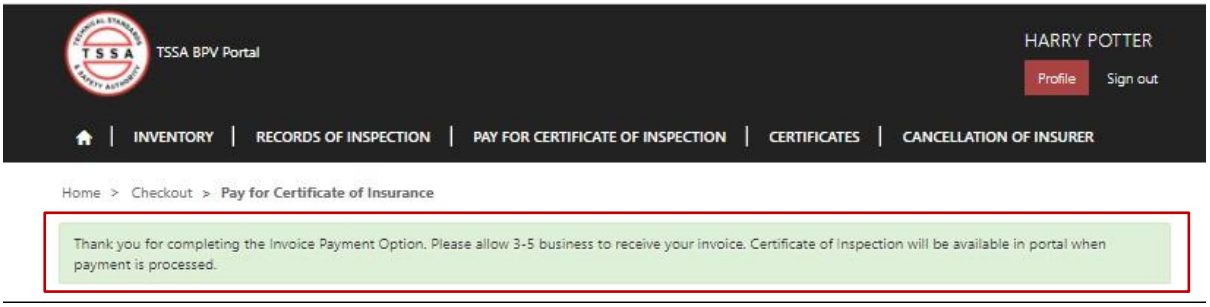
    Click on the Generate Invoice button.

43.



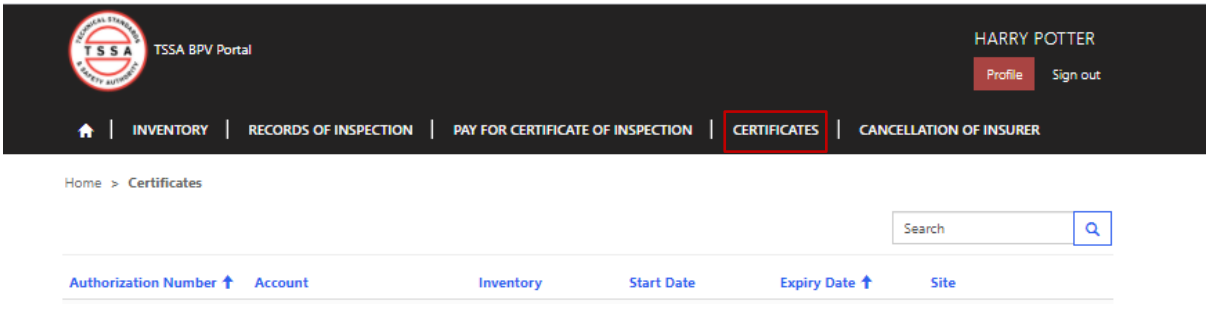
44. Confirmation Notice will be displayed.

- *Note it will take 3-5 business days to receive your invoice. Certificate of Inspection will be available in Portal once payment is processed.*

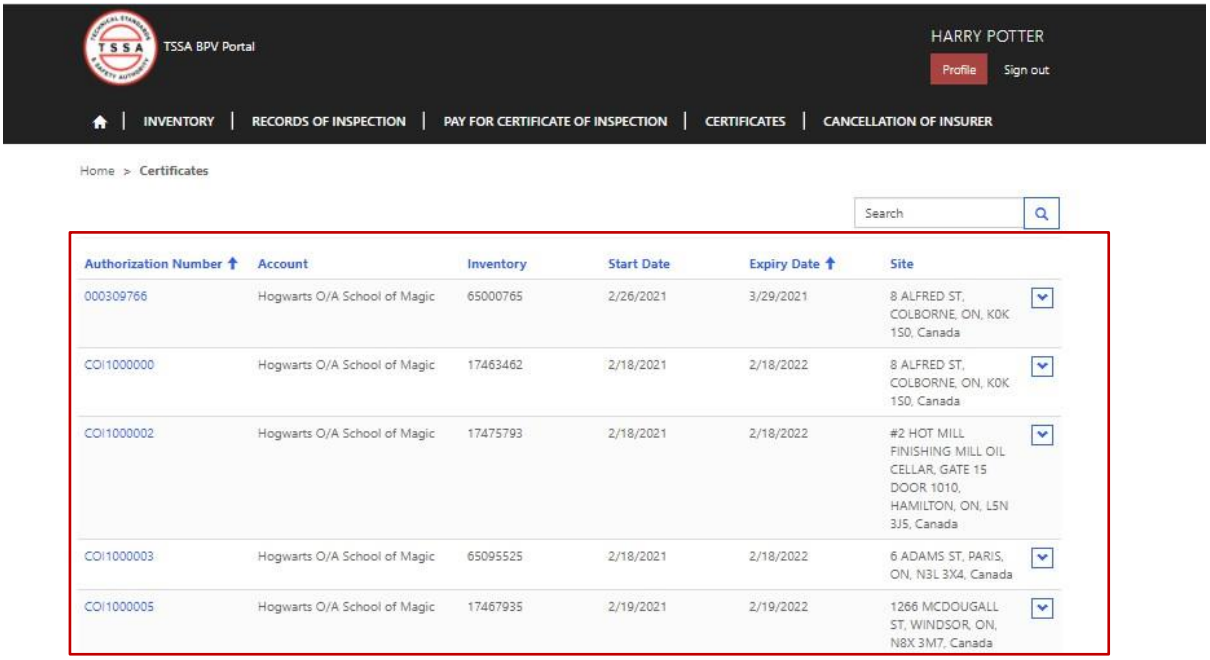


Certificates

45. Click on the Certificates tab located on the menu bar

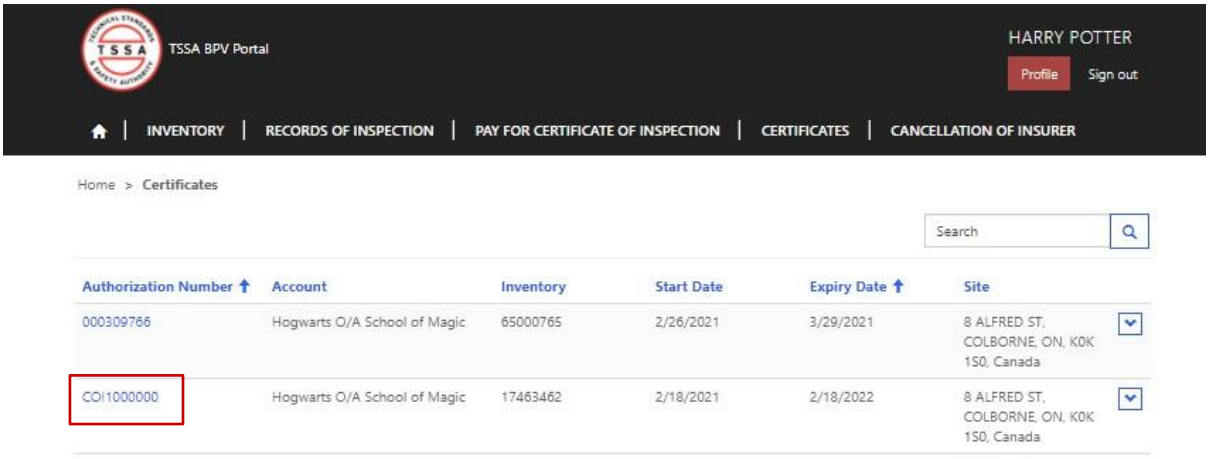


46. The system displays the list of all paid Certificates associated with the User



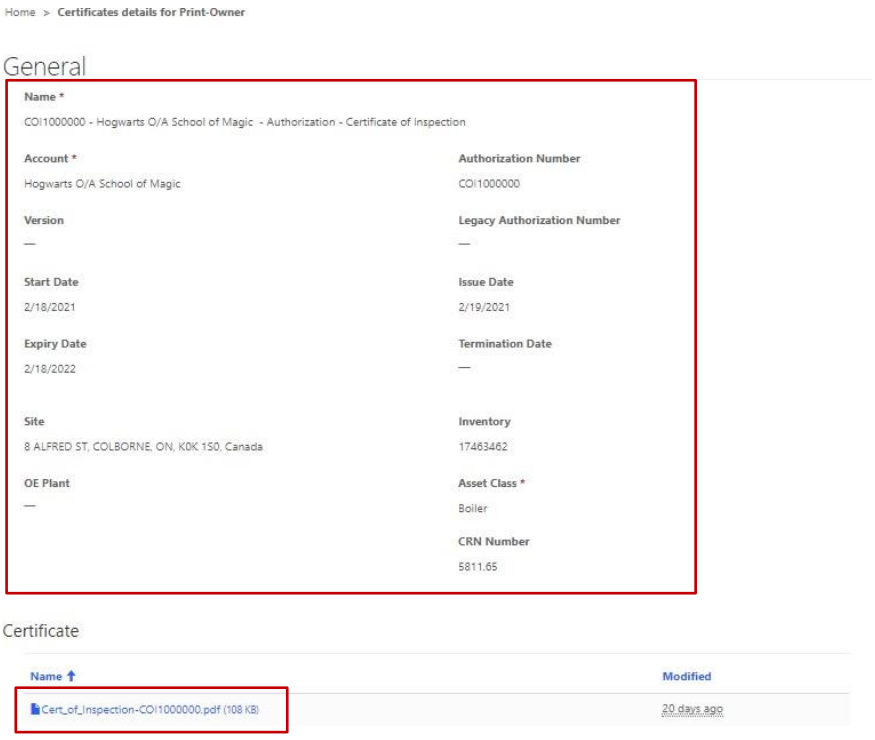
Authorization Number	Account	Inventory	Start Date	Expiry Date	Site
000309766	Hogwarts O/A School of Magic	65000765	2/26/2021	3/29/2021	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada
COI1000000	Hogwarts O/A School of Magic	17463462	2/18/2021	2/18/2022	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada
COI1000002	Hogwarts O/A School of Magic	17475793	2/18/2021	2/18/2022	#2 HOT MILL FINISHING MILL OIL CELLAR, GATE 15 DOOR 1010, HAMILTON, ON, L5N 3J5, Canada
COI1000003	Hogwarts O/A School of Magic	65095525	2/18/2021	2/18/2022	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada
COI1000005	Hogwarts O/A School of Magic	17467935	2/19/2021	2/19/2022	1266 MCDOUGALL ST, WINDSOR, ON, N8X 3M7, Canada

47. Click on the Authorization Number
> System will redirect user to Certificate detail page

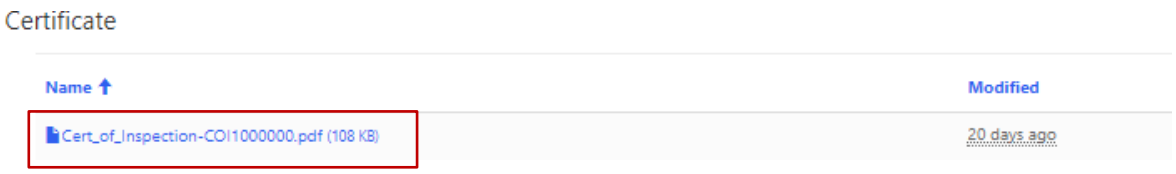


Authorization Number	Account	Inventory	Start Date	Expiry Date	Site
000309766	Hogwarts O/A School of Magic	65000765	2/26/2021	3/29/2021	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada
COI1000000	Hogwarts O/A School of Magic	17463462	2/18/2021	2/18/2022	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada

48. System displays details of the Certificate. The PDF copy of the COI is located at the bottom of the page.



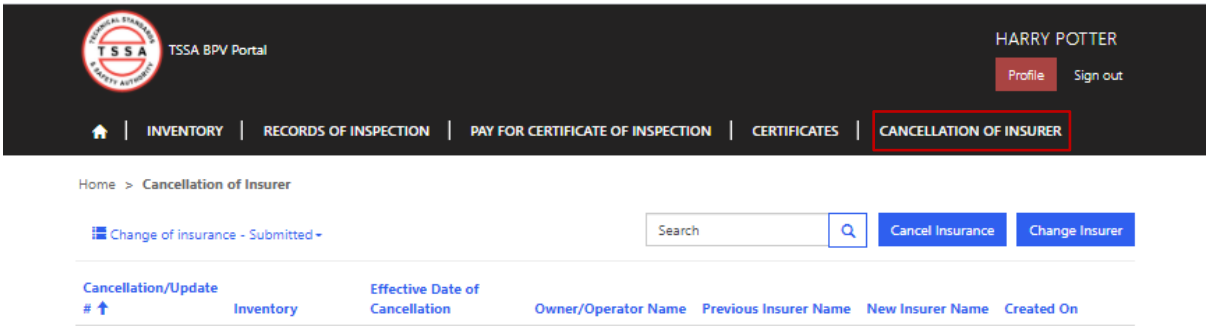
49. To download a copy, click on the Certificate link
    > System will download a pdf copy to the computer



50. Click on the downloaded file to open the Certificate

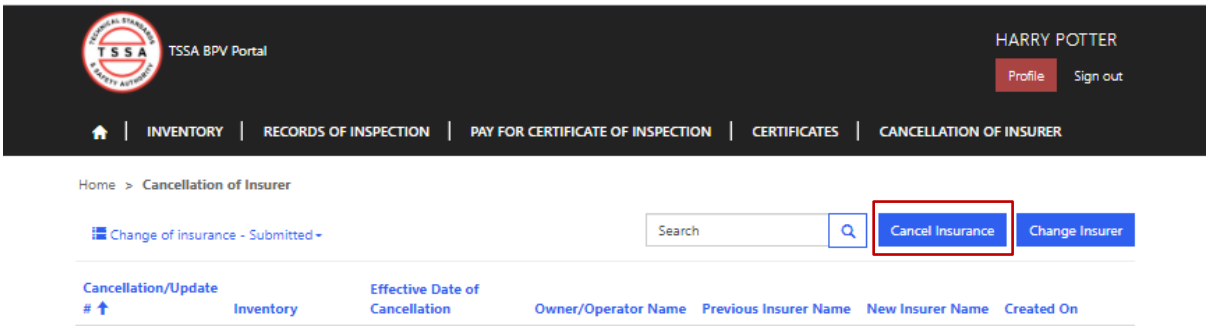
Cancellation of Insurer

51. Click on the Cancellation of Insurer tab located on the top menu bar.

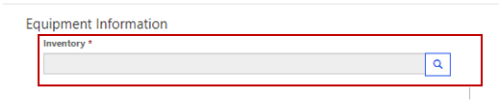


Cancel Insurance

52. Click on Cancel Insurance button if you permit TSSA to complete the Periodic Inspection of the Inventory.
    > System will launch the form

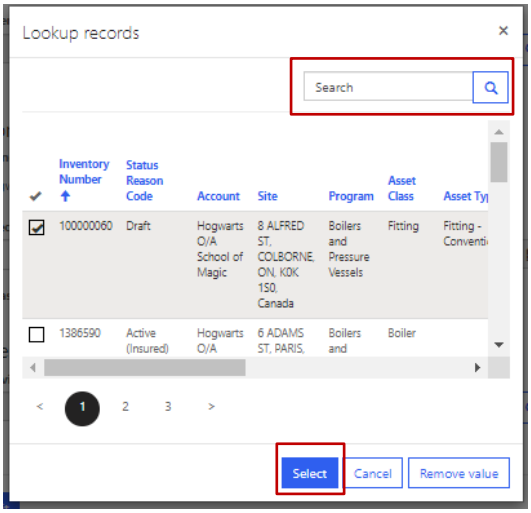


53. Click on the magnifying glass located in the inventory field.
    > System will display a window with a list of inventories that are associated with the user

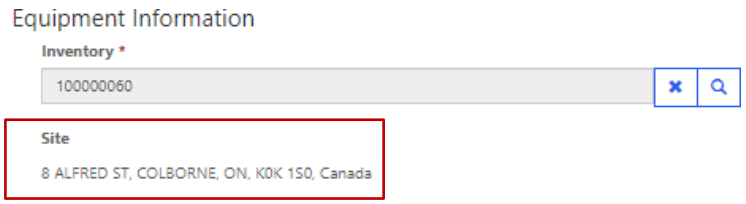


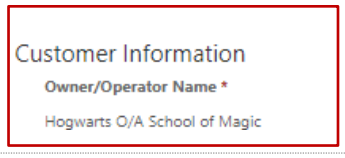
54. Use the search bar to find the inventory in our database.
    > The system will display a checkmark next to the selected Inventory.

Click on the Select button located at the bottom of the window

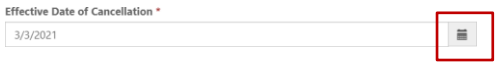


55. The system auto-displays Site Address and Owner/Operator of the device.

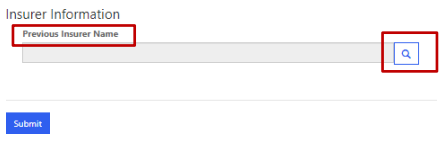




56. Complete the Effective Date of Cancellation Field.

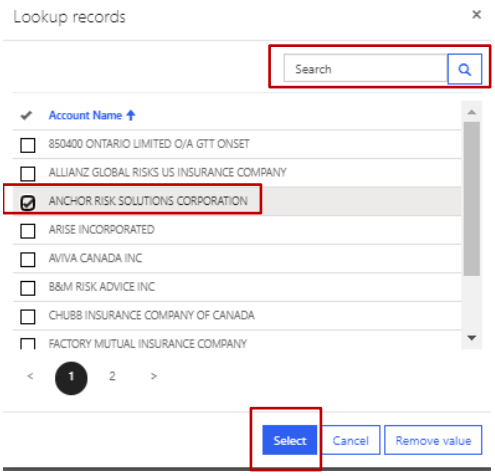


57. Click on the Magnifying Glass located on Previous Insurer Name field

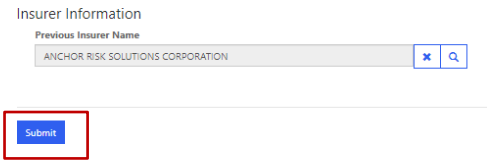


58. Use the search bar to find the insurer's name in our database.
    > The system will display a checkmark next to the selected Inventory.

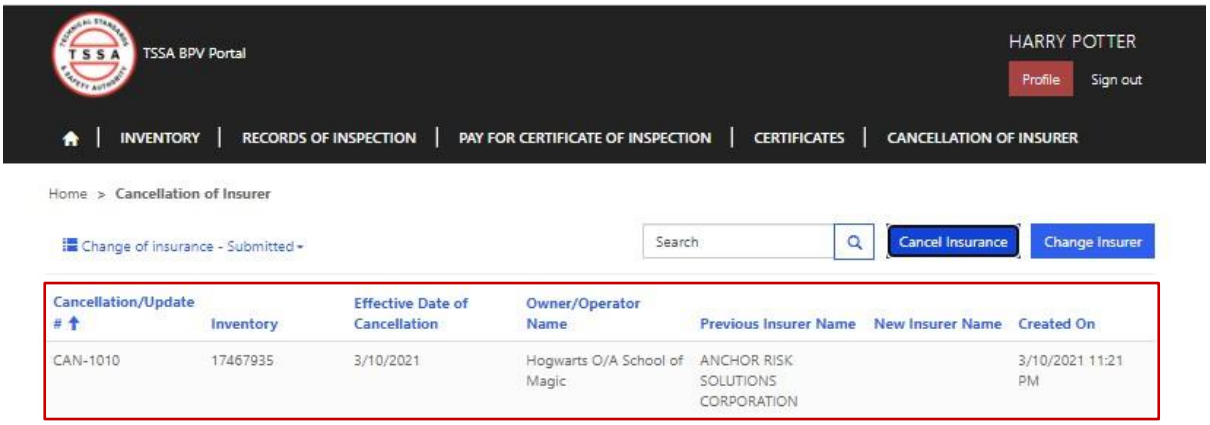
    Click on the Select button located at the bottom of the window



59. Click on the Submit button located on the form

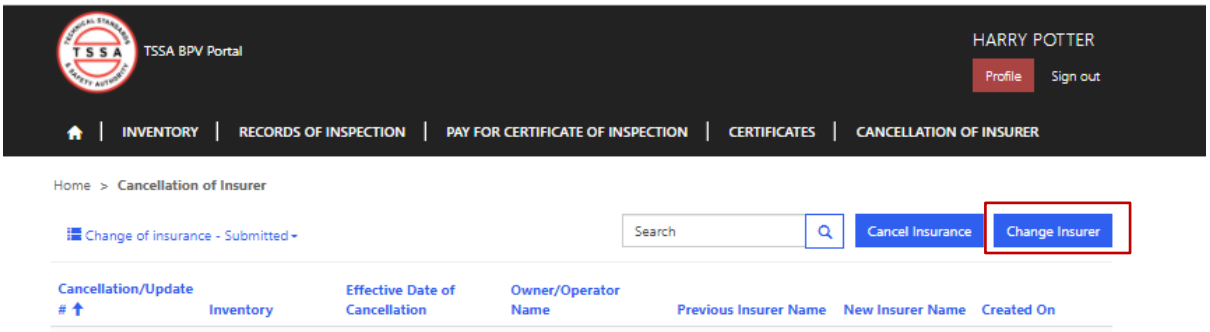


60. The system will display the submitted record on the Cancellation of Insurer Page.

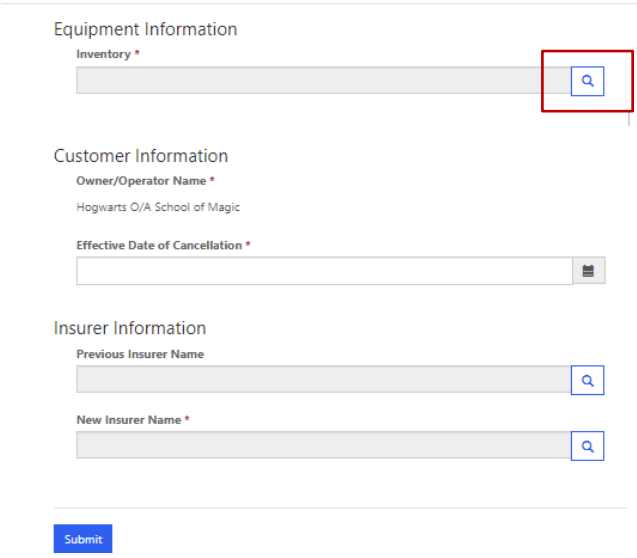


Change Insurer

61. Click on Change Insurer button when you want to notify TSSA of an Insurer that will be completing your Periodic Inspections

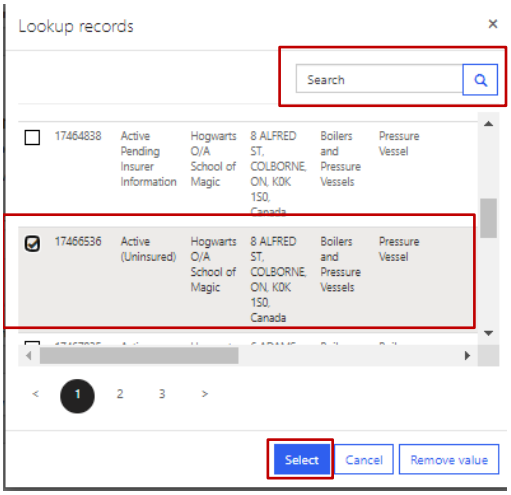


62. Click on the magnifying glass located in the inventory field.
    > System will display a window with a list of inventories that are associated with the user

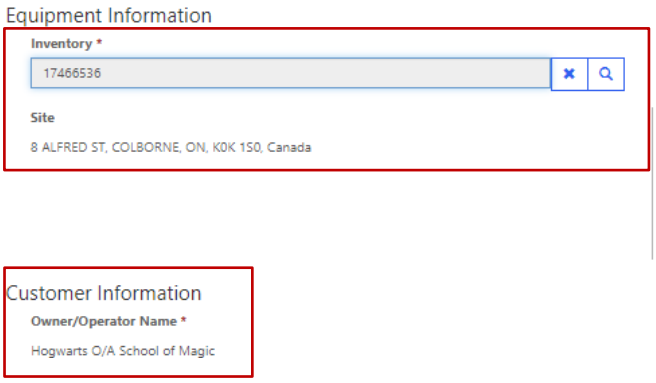


63. Use the search bar to find the inventory in our data base.
    > System will display a checkmark next to the selected Inventory

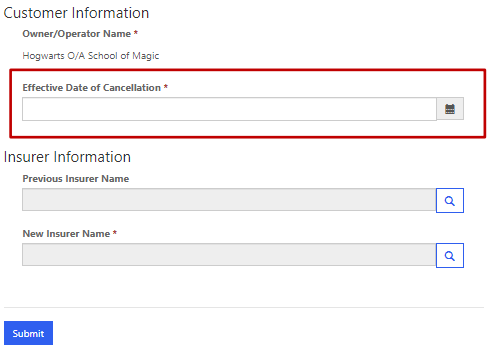
Click on the Select button located at the bottom of the window



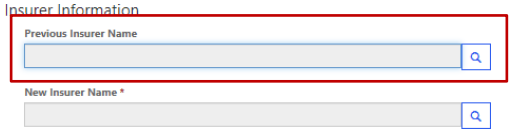
64. The system auto-populates the Site Address and Owner/Operator of the device.



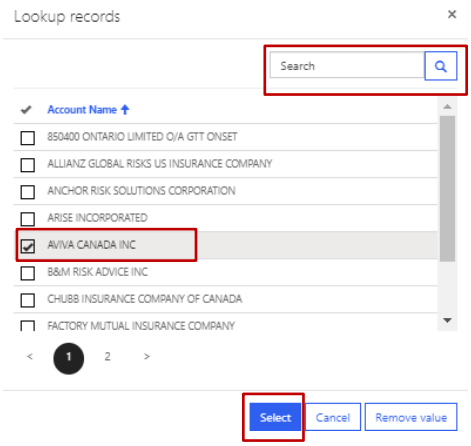
65. Complete the Effective date of Cancellation Field



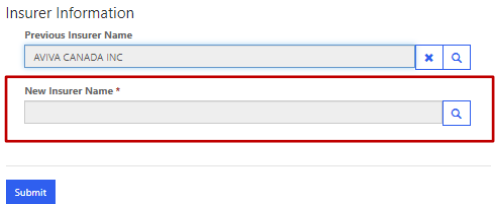
66. Click on the magnifying glass icon next to the Previous Insurer Name
    > System will launch the lookup records of the Insurer listed in the TSSA database



67. Use the search bar to find the insurer's name in our database.
    > The system will display a checkmark next to the selected Inventory.
    >
    Click on the Select button located at the bottom of the window

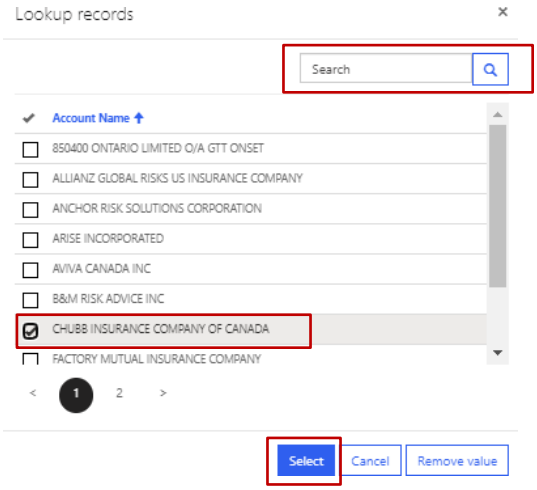


68. Click on the magnifying glass located in the New Insurer Name field.
    > System will launch the lookup records of the Insurer listed in the TSSA database

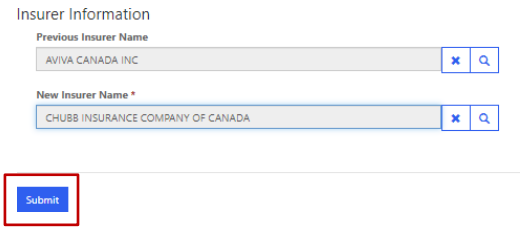


69. Use the search bar to find the insurer's name in our database.
    > System will display a checkmark next to the selected Inventory

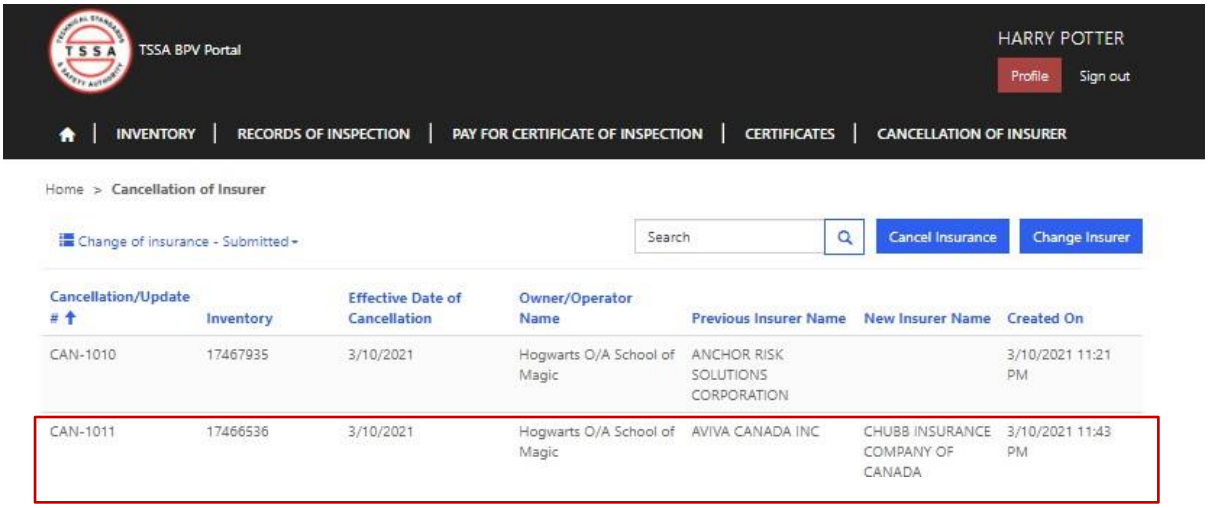
    Click on the Select button located at the bottom of the window



70. Click on the Submit button



71. The system will display the submitted record on the Cancellation of Insurer Page


TSSA BPV Portal
HARRY POTTER
Profile
Sign out
INVENTORY
RECORDS OF INSPECTION
PAY FOR CERTIFICATE OF INSPECTION
CERTIFICATES
CANCELLATION OF INSURER
Home > Cancellation of Insurer
Change of insurance - Submitted
Search
Cancel Insurance
Change Insurer
Cancellation/Update #
Inventory
Effective Date of Cancellation
Owner/Operator Name
Previous Insurer Name
New Insurer Name
Created On
CAN-1010
17467935
3/10/2021
Hogwarts O/A School of Magic
ANCHOR RISK SOLUTIONS CORPORATION
3/10/2021 11:21 PM
CAN-1011
17466536
3/10/2021
Hogwarts O/A School of Magic
AVIVA CANADA INC
CHUBB INSURANCE COMPANY OF CANADA
3/10/2021 11:43 PM

Appendix

ROI Status	Definition
Submitted by Insurer	Records of Inspections submitted by Insurer and pending validation from Owners/Operators
Validated	Records of Inspection submitted and validated by Owner/Operators
Pending Payment	Records of Inspections Validated by Owner/Operators and pending Payment for COI's
Paid	Records of Inspection validated, and the Certificate has been paid for by the owner
Rejected	Records of Inspection Submitted by Insurer and Owner/Operator has rejected the ROI due to Incorrect Information.

Frequently Asked Questions (FAQ)

1. Q. **I didn't receive an email to register for the Portal.**
   A. Please send an email to bpv_inquiries@tssa.org or call 416.734.3400.
2. Q. **My list of inventories is missing devices.**
   A. Please send an email to bpv_inquiries@tssa.org
3. Q. **The inventory details information presented in the portal is not correct, who can I contact?**
   A. Please contact our BPV technical team at bpvcustomerservice@tssa.org