



CRM
Version 0.1



Technical Standards and Safety Authority

Owner/Operator Portal Training Documentation





Owner Portal Training Document

Contents

- Overview** 2
 - Prerequisites:..... 2
 - Step-by-step Instructions..... 2
- Signing into Portal** 2
- Profile Page** 4
- Home Page**..... 5
- Inventory Page** 6
 - Searching for Inventories 6
 - Downloading List of Inventories..... 7
 - View Details of Inventory..... 7
- Records of Inspection Page** 9
 - Searching Records of Inspections..... 9
 - View Records of inspection in different status's 10
- Validate Records of Inspection** 10
 - Rejecting Records of Inspection..... 12
 - Pay for Certificate of Inspection..... 14
 - Pay with Credit Card..... 16
 - Pay with Invoice..... 18
- Certificates** 20
- Cancellation of Insurer** 23
 - Cancel Insurance..... 23
 - Change Insurer..... 26
- Appendix**..... 30
- Frequently Asked Questions (FAQ)**..... 30



Overview

This training document will help users navigate through the Owner Portal App and complete functionalities such as: Validating ROI's, Pay for Certificate of Inspections and submit cancellation of Insurer.

Prerequisites:

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

Step-by-step Instructions

Step	Task	Screen
------	------	--------

Signing into Portal

1. Open link to Owner Portal App:
“<https://ownerservices.tssa.org>”



2. Click on Sign In button



Welcome to TSSA BPV COI Portal
Click on Sign In Button to initiate services.



3. Enter Log in information

√

[Sign in](#) [Redeem invitation](#)

Sign in with a local account

* Username

* Password

Remember me?

[Sign in](#) [Forgot your password?](#)

4. Click on Sign in Button

[Sign in](#) [Redeem invitation](#)

Sign in with a local account

* Username

* Password

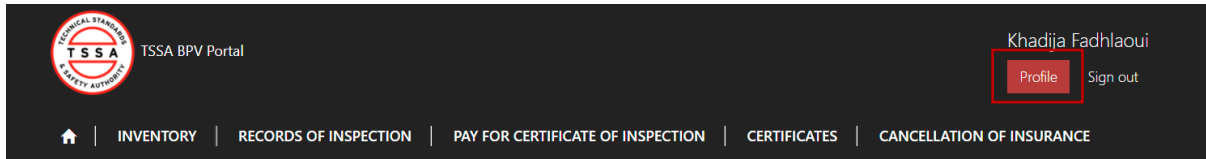
Remember me?

[Sign in](#) [Forgot your password?](#)



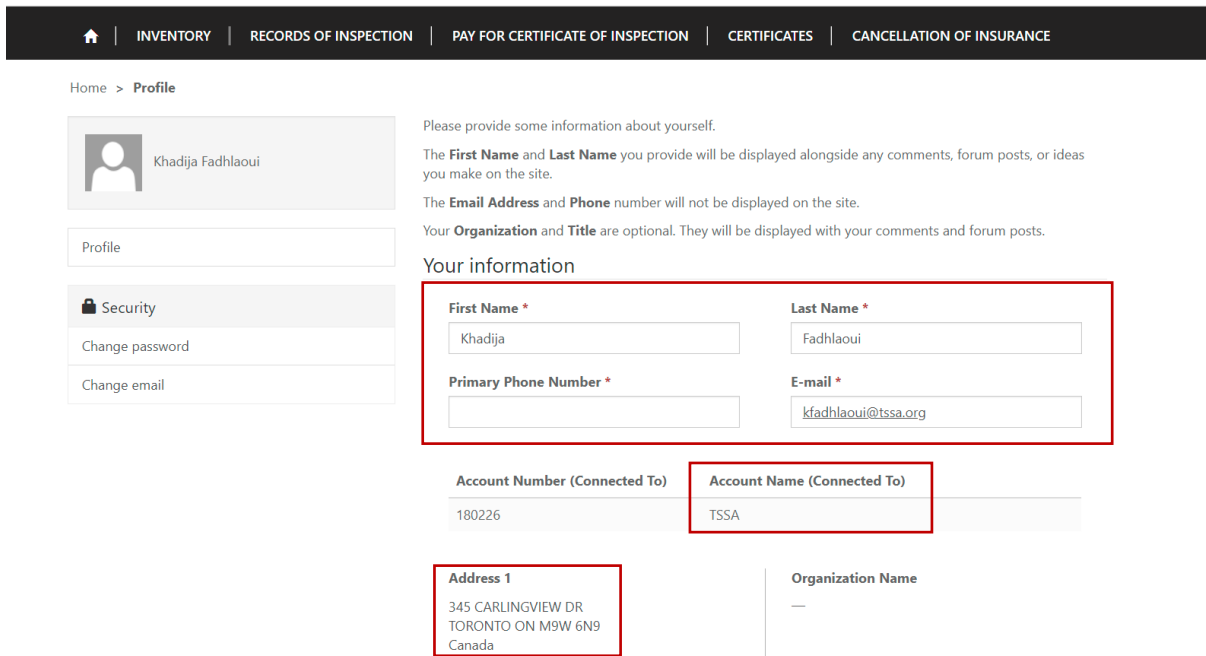
Profile Page

5. Select the Profile option from your User Name Menu in the top right corner.



6. 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 TSSA database.*





CRM
Version 0.1




Home Page

Home page will be displayed to users when clicking on the "Home" tab located at the top menu bar.

- > Home page displays quick links to other pages on portal




TSSA BPV PortalHARRY POTTER
[Profile](#) [Sign out](#)

[Home](#) | [INVENTORY](#) | [RECORDS OF INSPECTION](#) | [PAY FOR CERTIFICATE OF INSPECTION](#) | [CERTIFICATES](#)


Welcome, Hogwarts O/A School of Magic

3 Anderson Blvd
Uxbridge ON L4A 7X4
Canada


Email: hogwarts@tssa.org
Phone: 4167343536




Inventory



Records of Inspection



Pay for Certificate(s) of Inspection



Cancellation of Insurer

[Most recent articles](#) | [TSSA BPV legislation](#) | [Training Videos](#)



Inventory Page

7. Inventory page displays a list of Inventories that the portal user is associated to in TSSA Database.

The screenshot shows the TSSA BPV Portal interface. The user is logged in as HARRY POTTER. The navigation menu includes INVENTORY, RECORDS OF INSPECTION, PAY FOR CERTIFICATE OF INSPECTION, and CERTIFICATES. The INVENTORY page is active, showing a search bar and a Download button. Below the search bar is a table with the following data:

TSSA Inventory #	Account	Account Site	Site	Asset Class	Status	CRN Number	Equipment Tag	OIN	National Board Number	Serial Number
10000060	Hogwarts O/A School of Magic	Slytherin House	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	Fitting	Draft	01199.25ADD				
1386590	Hogwarts O/A School of Magic	Gryffindor House	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	Boiler	Active (Insured)	H7268.5				51129101

Searching for Inventories

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

- △ *Astrix symbol (*) is used as a wild card in Portal app. Use this to maxiums your search in the database.*

The screenshot shows the TSSA BPV Portal interface with a search filter applied. The search bar contains the text "13865*" and is highlighted with a red box. The table below shows the results of the search:

TSSA Inventory #	Account	Account Site	Site	Asset Class	Status	CRN Number	Equipment Tag	OIN	National Board Number	Serial Number
1386590	Hogwarts O/A School of Magic	Gryffindor House	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	Boiler	Active (Insured)	H7268.5				51129101



Downloading List of Inventories

- To view a full list of your inventories click on the Download button located on far right side of the screen.
 - > System will download excel list of inventories
 - △ User can use the excel file to filter by site or owner/operator name

9.

The screenshot shows the TSSA BPV Portal interface. The user is logged in as Armitesh Solanki. The navigation menu includes Home, INVENTORY (highlighted), RECORDS OF INSPECTION, UPLOAD ROI, FAILED INSPECTIONS, and CANCELLATION OF INSURANCE. Below the navigation, there is a search bar and a Download button (highlighted with a red box). The main content area displays a table of inventory items.

Inventory Number ↑	Owner/Operator	Account Site	Site	Asset Class	Status	CRN Number	Equipment Tag	OIN	National Board Number	Serial Number
174598		CENTRAL UTILITIES PLANT	65 LANG WAY, GUELPH, ON, N1G 2W1, Canada	Boiler	Active (Uninsured)	D173.5	4	5.109705		62820

View Details of Inventory

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

The screenshot shows the TSSA BPV Portal interface. The user is logged in as HARRY POTTER. The navigation menu includes Home, INVENTORY (highlighted), RECORDS OF INSPECTION, PAY FOR CERTIFICATE OF INSPECTION, and CERTIFICATES. Below the navigation, there is a search bar and a Download button. The main content area displays a table of inventory items.

TSSA Inventory # ↑	Account	Account Site	Site	Asset Class	Status	CRN Number	Equipment Tag	OIN	National Board Number	Serial Number
10000060	Hogwarts O/A School of Magic	Slytherin House	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	Fitting	Draft	01199.25ADD				
1386590	Hogwarts O/A School of Magic	Gryffindor House	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	Boiler	Active (Insured)	H7268.5				51129101



11. Review details of Inventory.

Summary	
GENERAL	Serial Number
TSSA ID 1386590	51129101
Owner/ Operator * Hogwarts O/A School of Magic	Manufacturer's Name WEIL-MCLAIN (A MARLEY COMPANY)
CRN Number H7268.5	
Installation Address 6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	
Equipment Tag Number —	
Device Type * Boiler	
Inspection Cycle Months 24 Months	
Date of Last Inspection 10/8/2019	



Records of Inspection Page

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

TSSA BPV Portal | Amitesh Solanki | Profile | Sign out

Home | INVENTORY | **RECORDS OF INSPECTION** | UPLOAD ROI | FAILED INSPECTIONS | CANCELLATION OF INSURANCE

Home > Records of Inspection

ROI(s) - Submitted by Insurer

ROI Number	Inventory Number	Equipment Type	Account Name (Owner/Operator)	Site Address	ROI Status	ROI Submission Date
53076	6466			84 SMELTER RD, CONISTON, ON, P0M 1M0, Canada	Submitted by Insurer	2/24/2021 1:54 PM
50670	4507			250 LAURIER BLVD, BROCKVILLE, ON, K6V 5V7, Canada	Submitted by Insurer	2/24/2021 1:54 PM
42243	179:			3 UNIROYAL RD, PO BOX 430, LINDSAY, ON, K9V 4S5, Canada	Submitted by Insurer	2/24/2021 1:54 PM

Searching Records of Inspections

- Use the quick search bar located at the top right side to find ROI's.
 - △ *Astrix symbol (*) is used as a wild card in Portal app. Use this to maxiums your search in the database.*

TSSA BPV Portal | Amitesh Solanki | Profile | Sign out

Home | INVENTORY | **RECORDS OF INSPECTION** | UPLOAD ROI | FAILED INSPECTIONS | CANCELLATION OF INSURANCE

Home > Records of Inspection

ROI(s) - Submitted by Insurer

5307*

ROI Number	Inventory Number	Equipment Type	Account Name (Owner/Operator)	Site Address	ROI Status	ROI Submission Date
53076	646672			84 SMELTER RD, CONISTON, ON, P0M 1M0, Canada	Submitted by Insurer	2/24/2021 1:54 PM

© 2017 Technical Standards and Safety Authority, 345 Carlingview Drive, Toronto, ON, M9W 6N9
Phone: 1-877-682-8772 Email: customerservices@tssa.org

Helpful Links
Knowledge Articles TSSA Website



View Records of inspection in different status's

14. To view different status's of ROI's click on the drop down arrow next to Submitted by Insurer and select value from the list of values.

TSSA BPV Portal | Amitesh Solanki | Profile | Sign out

Home | INVENTORY | RECORDS OF INSPECTION | UPLOAD ROI | FAILED INSPECTIONS | CANCELLATION OF INSURANCE

Home > Records of Inspection

ROI(s) - Submitted by Insurer

ROI Number	Equipment Type	Account Name (Owner/Operator)	Site Address	ROI Status	ROI Submission Date
			84 SMELTER RD, CONISTON, ON, POM 1M0, Canada	Submitted by Insurer	2/24/2021 1:54 PM

Validate Records of Inspection

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

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

Home | INVENTORY | RECORDS OF INSPECTION | PAY FOR CERTIFICATE OF INSPECTION | CERTIFICATES

Home > Records of Inspection

ROI(s) - Submitted by Insurer

ROI Number	Inventory Number	Equipment Type	SYSTEM OWNER	Site Address	ROI STATUS	ROI Submission Date
ROI-1008	65095524		Hogwarts O/A School of Magic	319 SHERMAN AVE N, HAMILTON, ON, L8L 6N2, Canada	Submitted by Insurer	2/18/2021 6:45 PM



15. Review the details of the ROI

Home > Record of Inspection

[Approve ROI](#) [Reject ROI](#)

Record of Inspection

ROI Number	ROI-1008	Date of Validation	—
ROI Status *	Submitted by Insurer	Authorization	—
ROI Submission Date	2/18/2021 6:45 PM		

Customer Information

ROI Submitter	Hogsmeade Insurance A Div Of All-wizarding Insurance	Contact Name	harry potter
Owner/Operator	Hogwarts O/A School of Magic	Contact Phone Number	—
		Contact Email Address	hpotter@tssa.org

Inspection Information

Insurer : *	Hogsmeade Insurance A Div Of All-wizarding Insurance	Inspection Agency	850400 ONTARIO LIMITED O/A GTT ONSET
Inspector Name	ISHTIAQ A TARAR	TSSA Issued Inspector Certificate Number (CoC)	000266480
Inspection Type *	External	Inspection Date *	2/9/2021
ROI Inspection Status	Pass		

Inventory Information

TSSA ID *	65095524	Serial Number	4014
Asset Class *	Pressure Vessel	OIN	—
CRN Number	L4988.5		



- 16. 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 Pay for Certificate of Inspection page

Home > Record of Inspection



Record of Inspection
ROI Number
ROI-1008

17. Rejecting Records of Inspection

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

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

INVENTORY | RECORDS OF INSPECTION | PAY FOR CERTIFICATE OF INSPECTION | CERTIFICATES

Home > Records of Inspection

ROI(s) - Submitted by Insurer

ROI Number	Inventory Number	Equipment Type	SYSTEM OWNER	Site Address	ROI STATUS ↑	ROI Submission Date
ROI-1008	65095524		Hogwarts O/A School of Magic	319 SHERMAN AVE N, HAMILTON, ON, L8L 6N2, Canada	Submitted by Insurer	2/18/2021 6:45 PM

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

Home > Record of Inspection



Record of Inspection
ROI Number
ROI-1008

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

INVENTORY | RECORDS OF INSPECTION | PAY FOR CERTIFICATE OF INSPECTION | CERTIFICATES | CANCELLATION OF INSURER

Home > Records of inspection for Reject

ROI Number
ROI-1073

Reason for Rejection

Comments *

Submit



20. Complete the Fields on Form



21.

The screenshot shows the TSSA BPV Portal interface. The user is logged in as HARRY POTTER. The navigation menu includes: INVENTORY, RECORDS OF INSPECTION, PAY FOR CERTIFICATE OF INSPECTION, CERTIFICATES, and CANCELLATION OF INSURER. The current page is "Records of inspection for Reject". The form contains the following fields:

- ROI Number: ROI-1073
- Reason for Rejection: A dropdown menu.
- Comments *: A text area.
- Submit: A blue button.

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

The screenshot shows the form after submission. The "Reason for Rejection" dropdown is now populated with "Incorrect Inspection Information". The "Comments" text area contains the text: "It was not external inspection it was an internal inspection." The "Submit" button is highlighted with a red border.

23. Click on the ROI view and select "ROI(s) – Rejected". System will display the record in this view

The screenshot shows the "Records of Inspection" view with the "ROI(s) - Rejected" filter selected. A table displays the following record:

ROI Number	Inventory Number	Equipment Type	SYSTEM OWNER	Site Address	ROI STATUS ↑	ROI Submission Date
ROI-1078	17475793		Hogwarts O/A School of Magic	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	Rejected	3/10/2021 9:32 PM



Pay for Certificate of Inspection

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

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

INVENTORY | RECORDS OF INSPECTION | **PAY FOR CERTIFICATE OF INSPECTION** | CERTIFICATES | CANCELLATION OF INSURER

Home > Checkout

Inventory #	Site	ROI Number	Inspection Frequency	Amount Owing	Pay Now	Next
-------------	------	------------	----------------------	--------------	---------	------

25. System displays records that are pending Payment

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

INVENTORY | RECORDS OF INSPECTION | **PAY FOR CERTIFICATE OF INSPECTION** | CERTIFICATES | CANCELLATION OF INSURER

Home > Checkout

Inventory #	Site	ROI Number	Inspection Frequency	Amount Owing	Pay Now	Next
17469893	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	ROI-1079	24 Months	\$80.00		
17467935	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	ROI-1080	24 Months	\$80.00		

26. To add Checkout items click on the drop down arrow and select "check"

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

INVENTORY | RECORDS OF INSPECTION | **PAY FOR CERTIFICATE OF INSPECTION** | CERTIFICATES | CANCELLATION OF INSURER

Home > Checkout

Inventory #	Site	ROI Number	Inspection Frequency	Amount Owing	Pay Now	Next
17469893	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	ROI-1079	24 Months	\$80.00	Selected	
17467935	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	ROI-1080	24 Months	\$80.00	Selected	



28. System will add value "Selected" under Pay Now column.

Home > Checkout

Inventory #	Site	ROI Number	Inspection Frequency	Amount Owing	Pay Now	Next
17469893	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	ROI-1079	24 Months	\$80.00		
17467935	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	ROI-1080	24 Months	\$80.00	Selected	

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

Home > Checkout

Inventory #	Site	ROI Number	Inspection Frequency	Amount Owing	Pay Now	Next
17469893	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	ROI-1079	24 Months	\$80.00		
17467935	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	ROI-1080	24 Months	\$80.00	Selected	

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

Home > Checkout > Pay for Certificate of Insurance

Payment Details

Payment Type *

- Pay with credit card
- Pay with invoice

Next



Pay with Credit Card

31. Select Pay with Credit Card as Payment Type
- △ *All records selected to be paid by Credit Card must be paid by 10pm that evening. Otherwise payment type will automatically default to invoice option.*

TSSA BPV Portal HARRY POTTER Profile Sign out

INVENTORY | RECORDS OF INSPECTION | PAY FOR CERTIFICATE OF INSPECTION | CERTIFICATES | CANCELLATION OF INSURER

Home > Checkout > Pay for Certificate of Insurance

Payment Details

Payment Type *
Pay with credit card

Next

32. Click on "Next" button
- > System will display record(s) selected with the Amount Owing

TSSA BPV Portal HARRY POTTER Profile Sign out

INVENTORY | RECORDS OF INSPECTION | PAY FOR CERTIFICATE OF INSPECTION | CERTIFICATES | CANCELLATION OF INSURER

Home > Checkout > Pay for Certificate of Insurance

Payment Details

Payment Type *
Pay with credit card

Next

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

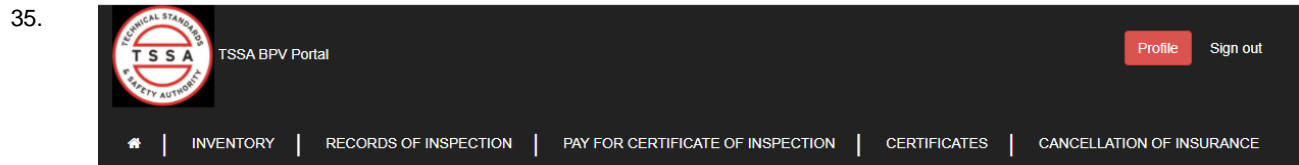
17467935	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	ROI-1080	24 Months	\$80.00
----------	--	----------	-----------	---------

Total Paid
\$ 80.00

Continue to Payment

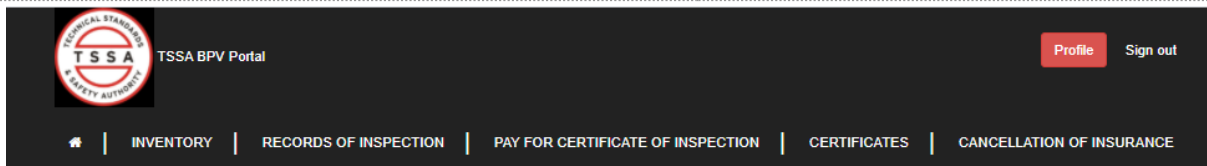


34. Validate system displays the correct Amount to Pay and click on the green button "click to proceed to Secure Page"
- > System will direct users to the Moneris Credit Card Payment page



A snippet of a payment form. It features two input fields: "Amount to Pay:" with the value "80" and "ROI Payment Id:" with the value "ROIP-1026". Below these fields is a green button labeled "Click to proceed to Secure Page".

36. Enter your credit card information, and click on Process Transaction button.
- > System will process payment and direct the user to their confirmation page



The screenshot shows a payment form titled "kevin - QA Store". It includes the following elements:

- Mandatory fields marked by *
- Section header: **Payment Details**
- Transaction Amount: \$ 80.00 (CAD) with VISA and MasterCard logos.
- Order ID: ROIP-1028
- Instruction: "Please complete the following details exactly as they appear on your card. Do not put spaces or hyphens in the card number."
- Form fields (highlighted with a red box):
 - Cardholder Name*:
 - Card Number*:
 - Expiry Date (MMYY)*:
- Instructions: "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."
- Buttons: "Process Transaction" (green) and "Cancel Transaction" (red).



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

Key	Value
response_order_id	ROIIP-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
f4i4	4242***4242
card	V

38. **Pay with Invoice**

- 39. Select Payment Type "Pay with Invoice"
 - > System will auto display Invoice payment Details field

Home > Checkout > Pay for Certificate of Insurance

Payment Details

Payment Type *
Pay with invoice

Invoice Payment Details

Invoice Consolidation

Create one invoice for all records

Invoice each of these records separately

Purchase order number

TSSA does not accept Purchase Orders for Certifications, as a courtesy we will print the Purchase order number on Invoice only.

[Next](#)

- 40. Select an option under Invoice Payment Details



Home > Checkout > Pay for Certificate of Insurance

Payment Details

Payment Type *

Pay with invoice

Invoice Payment Details

Invoice Consolidation

Create one invoice for all records

Invoice each of these records separately

Purchase order number

TSSA does not accept Purchase Orders for Certifications, as a courtesy we will print the Purchase order number on Invoice only.

Next

41. 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.

Home > Checkout > Pay for Certificate of Insurance

Payment Details

Payment Type *

Pay with invoice

Invoice Payment Details

Invoice Consolidation

Create one invoice for all records

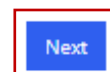
Invoice each of these records separately

Purchase order number

TSSA does not accept Purchase Orders for Certifications, as a courtesy we will print the Purchase order number on Invoice only.

Next

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





43. Validate system displays Record(s) selected and the Total amount displayed.

Click on Generate Invoice button.

44.

Home > Checkout > Pay for Certificate of Insurance

ROI(s) selected to Pay

Inventory Number (TSSA ID)	Site (TSSA ID)	ROI Number ↑	Inspection Cycle (TSSA ID)	Amount Owning
17469893	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	ROI-1079	24 Months	\$80.00

Total Paid
\$ 80.00

Generate Invoice

45. 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.*

TSSA BPV Portal HARRY POTTER Profile Sign out

Home > Checkout > Pay for Certificate of Insurance

Thank you for completing the Invoice Payment Option. Please allow 3-5 business to receive your invoice. Certificate of Inspection will be available in portal when payment is processed.

Certificates

46. Click on Certificates tab located on the menu bar

TSSA BPV Portal HARRY POTTER Profile Sign out

Home > Certificates

Search

Authorization Number ↑ Account Inventory Start Date Expiry Date ↑ Site

47.



48. System displays list of all paid Certificates associated to the User

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

Home > Certificates

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

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

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

Home > Certificates

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



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

Home > Certificates details for Print-Owner

General

Name * COI1000000 - Hogwarts O/A School of Magic - Authorization - Certificate of Inspection	
Account * Hogwarts O/A School of Magic	Authorization Number COI1000000
Version —	Legacy Authorization Number —
Start Date 2/18/2021	Issue Date 2/19/2021
Expiry Date 2/18/2022	Termination Date —
Site 8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	Inventory 17463462
OE Plant —	Asset Class * Boiler
	CRN Number 5811.65

Certificate

Name ↑	Modified
Cert_of_Inspection-COI1000000.pdf (108 KB)	20 days ago

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

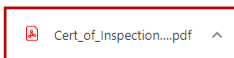
Certificate

Name ↑	Modified
Cert_of_Inspection-COI1000000.pdf (108 KB)	20 days ago

52. Click on the downloaded file to open the Certificate

Certificate

Name ↑	Modified
Cert_of_Inspection-COI1000000.pdf (108 KB)	20 days ago





Cancellation of Insurer

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

The screenshot shows the TSSA BPV Portal interface. The top navigation bar is dark with the TSSA logo on the left and the user name 'HARRY POTTER' on the right. The 'CANCELLATION OF INSURER' tab is highlighted with a red box. Below the navigation bar, the breadcrumb 'Home > Cancellation of Insurer' is visible. A search bar and two buttons, 'Cancel Insurance' and 'Change Insurer', are present. Below these is a table header with columns: 'Cancellation/Update # ↑', 'Inventory', 'Effective Date of Cancellation', 'Owner/Operator Name', 'Previous Insurer Name', 'New Insurer Name', and 'Created On'.

Cancel Insurance

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

This screenshot is similar to the previous one, but the 'Cancel Insurance' button is highlighted with a red box. The rest of the interface, including the navigation bar, breadcrumb, search bar, and table header, remains the same.

55. Click on the magnifying glass located on inventory field
> System will displays a window with a list of inventories that are associated to the user

The screenshot shows a form titled 'Equipment Information'. It contains a text input field labeled 'Inventory *' with a magnifying glass icon to its right, which is highlighted with a red box.



56. Use the search bar to find the inventory in our data base.
> System will displays a check mark next to the selected Inventory
Click on Select button located at the bottom of the window

Inventory Number	Status Reason Code	Account	Site	Program	Asset Class	Asset Ty
<input checked="" type="checkbox"/>	100000060	Draft	Hogwarts O/A School of Magic	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	Boilers and Pressure Vessels	Fitting - Conventi
<input type="checkbox"/>	1386590	Active (Insured)	Hogwarts O/A	6 ADAMS ST, PARIS,	Boilers and	Boiler

57. System auto displays Site Address and Owner/Operator of the device.

Equipment Information

Inventory *

100000060

Site

8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada

Customer Information

Owner/Operator Name *

Hogwarts O/A School of Magic

58. Complete the Effective Date of Cancellation Field.

Effective Date of Cancellation *

3/3/2021

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

Insurer Information

Previous Insurer Name

Submit



- 60. Use the search bar to find the insurer name in our data base.
 - > System will displays a check mark next to the selected Inventory

Lookup records

- Account Name ↑
- 850400 ONTARIO LIMITED O/A GTT ONSET
- ALLIANZ GLOBAL RISKS US INSURANCE COMPANY
- ANCHOR RISK SOLUTIONS CORPORATION
- ARISE INCORPORATED
- AVIVA CANADA INC
- B&M RISK ADVICE INC
- CHUBB INSURANCE COMPANY OF CANADA
- FACTORY MUTUAL INSURANCE COMPANY

- 61. Click on the Submit button located on the form

Insurer Information

Previous Insurer Name

ANCHOR RISK SOLUTIONS CORPORATION

- 62. System will display the submitted record on Cancellation of Insurer Page

TSSA BPV Portal

HARRY POTTER
Profile Sign out

Home
INVENTORY
RECORDS OF INSPECTION
PAY FOR CERTIFICATE OF INSPECTION
CERTIFICATES
CANCELLATION OF INSURER

Home > Cancellation of Insurer

Change of insurance - Submitted

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



Change Insurer

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

The screenshot shows the TSSA BPV Portal interface. At the top left is the TSSA logo and the text 'TSSA BPV Portal'. At the top right, the user name 'HARRY POTTER' is displayed with 'Profile' and 'Sign out' links. A navigation bar contains: INVENTORY, RECORDS OF INSPECTION, PAY FOR CERTIFICATE OF INSPECTION, CERTIFICATES, and CANCELLATION OF INSURER. Below the navigation bar, the breadcrumb 'Home > Cancellation of Insurer' is shown. A search bar is present with a magnifying glass icon. To the right of the search bar are two buttons: 'Cancel Insurance' and 'Change Insurer', with the latter highlighted by a red box. Below the search bar is a table header with columns: Cancellation/Update # ↑, Inventory, Effective Date of Cancellation, Owner/Operator Name, Previous Insurer Name, New Insurer Name, and Created On.

64. Click on the magnifying glass located on inventory field
> System will displays a window with a list of inventories that are associated to the user

65.

The screenshot shows the 'Change Insurer' form. It is divided into three sections: Equipment Information, Customer Information, and Insurer Information. The 'Equipment Information' section has a field for 'Inventory *' with a magnifying glass icon highlighted by a red box. The 'Customer Information' section has fields for 'Owner/Operator Name *' (with the value 'Hogwarts O/A School of Magic') and 'Effective Date of Cancellation *'. The 'Insurer Information' section has fields for 'Previous Insurer Name' and 'New Insurer Name *', both with magnifying glass icons. A 'Submit' button is located at the bottom of the form.



66. Use the search bar to find the inventory in our data base.
> System will displays a check mark next to the selected Inventory
Click on Select button located at the bottom of the window

Inventory #	Status	Owner/Operator	Site	Equipment
<input type="checkbox"/> 17464838	Active Pending Insurer Information	Hogwarts O/A School of Magic	8 ALFRED ST, COLBORNE ON, K0K 1S0, Canada	Boilers and Pressure Vessels
<input checked="" type="checkbox"/> 17466536	Active (Uninsured)	Hogwarts O/A School of Magic	8 ALFRED ST, COLBORNE ON, K0K 1S0, Canada	Boilers and Pressure Vessels

67. System auto populates Site Address and Owner/Operator of the device.

Equipment Information

Inventory *
17466536

Site
8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada

Customer Information

Owner/Operator Name *
Hogwarts O/A School of Magic

68. Complete the Effective date of Cancellation Field

Customer Information

Owner/Operator Name *
Hogwarts O/A School of Magic

Effective Date of Cancellation *

Insurer Information

Previous Insurer Name

New Insurer Name *

Submit

69. Click on the magnifying glass icon next to the Previous Insurer Name
> System will launch the lookup records of Insurer's listed in TSSA data base

Insurer Information

Previous Insurer Name

New Insurer Name *



70. Use the search bar to find the insurer name in our data base.
- > System will displays a check mark next to the selected Inventory
 - > Click on Select button located at the bottom of the window

Lookup records

Search

Account Name ↑

- 850400 ONTARIO LIMITED Q/A GTT ONSET
- ALLIANZ GLOBAL RISKS US INSURANCE COMPANY
- ANCHOR RISK SOLUTIONS CORPORATION
- ARISE INCORPORATED
- AVIVA CANADA INC
- B&M RISK ADVICE INC
- CHUBB INSURANCE COMPANY OF CANADA
- FACTORY MUTUAL INSURANCE COMPANY

1 2 >

Select Cancel Remove value

71. Click on magnifying glass located on the New Insurer Name field
- > System will launch the lookup records of Insurer's listed in TSSA data base

Insurer Information

Previous Insurer Name

AVIVA CANADA INC

New Insurer Name *

Submit

72. Use the search bar to find the insurer name in our data base.
- > System will displays a check mark next to the selected Inventory
- Click on Select button located at the bottom of the window

Lookup records

Search

Account Name ↑

- 850400 ONTARIO LIMITED Q/A GTT ONSET
- ALLIANZ GLOBAL RISKS US INSURANCE COMPANY
- ANCHOR RISK SOLUTIONS CORPORATION
- ARISE INCORPORATED
- AVIVA CANADA INC
- B&M RISK ADVICE INC
- CHUBB INSURANCE COMPANY OF CANADA
- FACTORY MUTUAL INSURANCE COMPANY

1 2 >

Select Cancel Remove value

73. Click on the Submit button

Insurer Information

Previous Insurer Name

AVIVA CANADA INC

New Insurer Name *

CHUBB INSURANCE COMPANY OF CANADA

Submit

74. System will display the submitted record on Cancellation of Insurer Page



CRM
Version 0.1



TSSA BPV Portal HARRY POTTER
[Profile](#) [Sign out](#)

[Home](#) | [INVENTORY](#) | [RECORDS OF INSPECTION](#) | [PAY FOR CERTIFICATE OF INSPECTION](#) | [CERTIFICATES](#) | [CANCELLATION OF INSURER](#)

Home > Cancellation of Insurer

Change of insurance - Submitted ▾ [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 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 email to customerservices@tssa.org or call 416.734.3400.
- 2. Q. My list of inventories is missing devices?**
A. Please send an email to customerservices@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