CRM

Version 0.1

Technical Standards and Safety Authority

Owner/Operator Portal Training Documentation

Owner Portal Training Document

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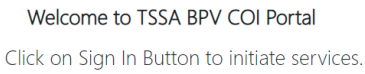
Overview

This training document will help users nagviate through the Owner Portal App and complete functionalites 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 regisrations form.

Step-by-step Instructions

Step	Task	Screen
	Signing into Portal	
1.	Open link to Owner Portal App: "https://ownerseservices.tssa.org "	
2.	Click on Sign In button	

3. Enter Log in information

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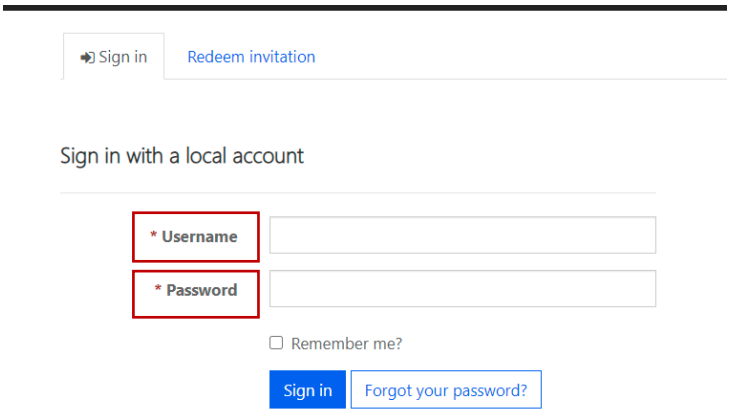
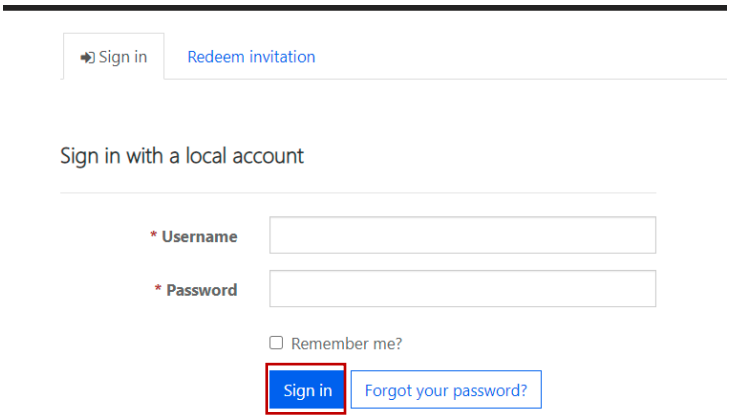
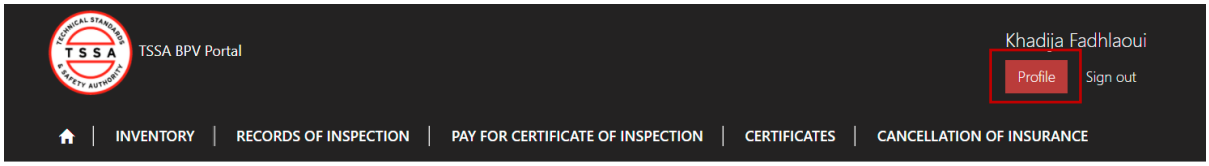


4. Click on Sign in Button



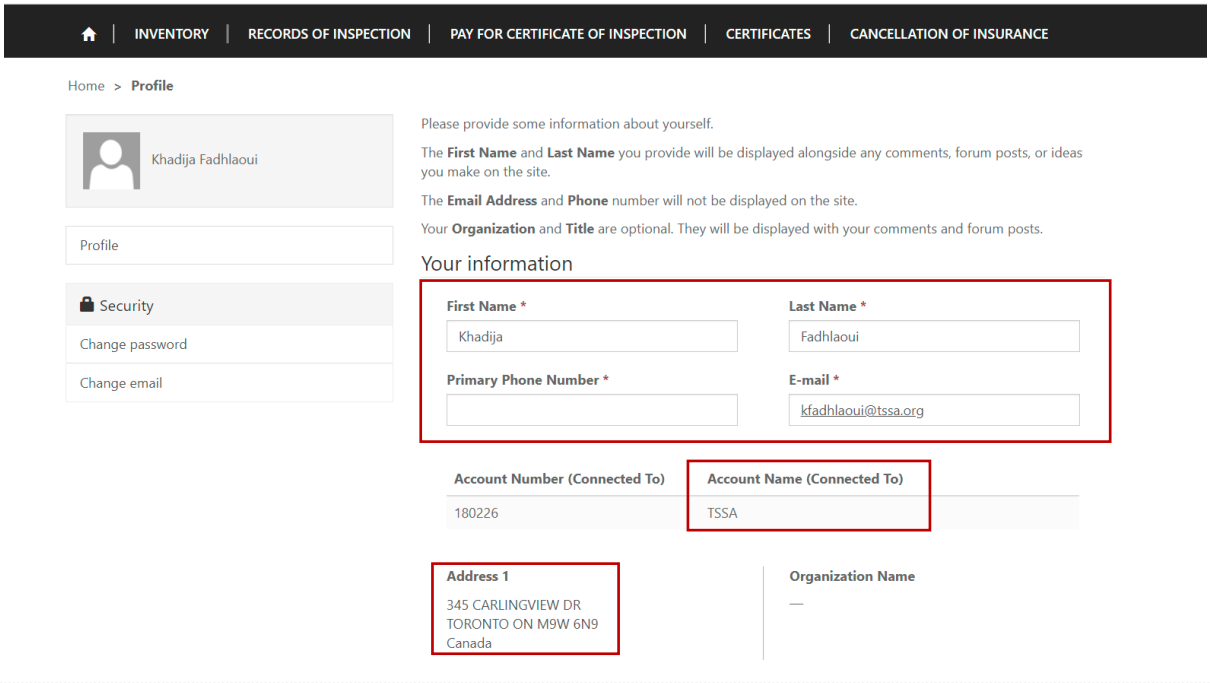
Profile Page

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.*



Home Page

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

> Home page diplays quick links to other pages on portal

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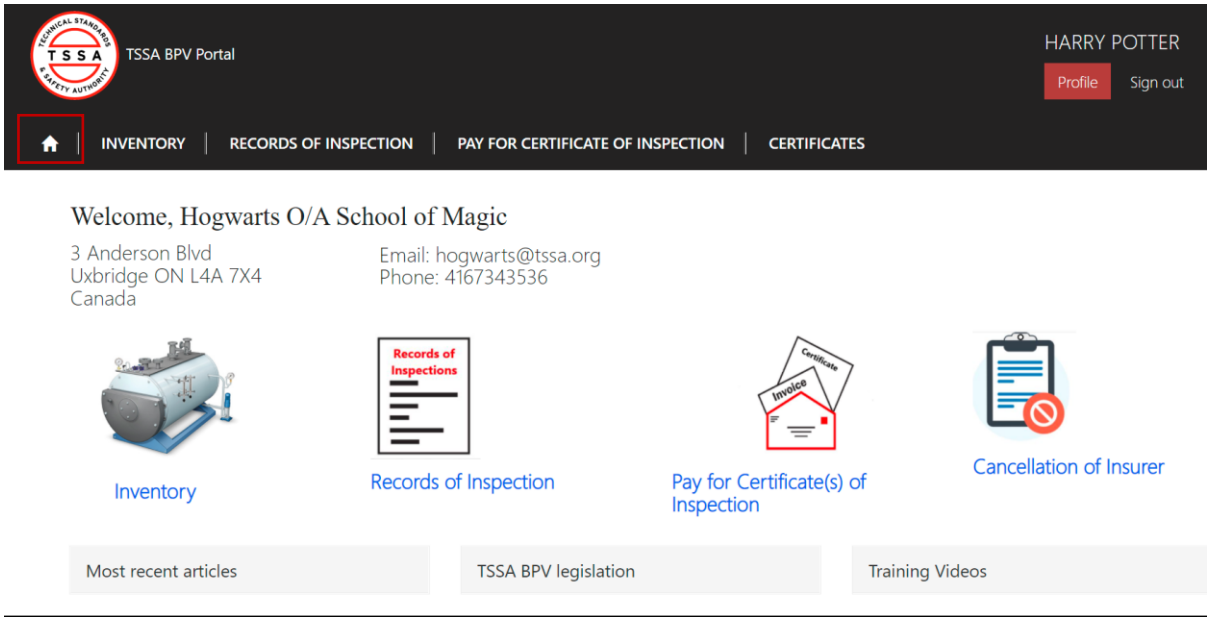
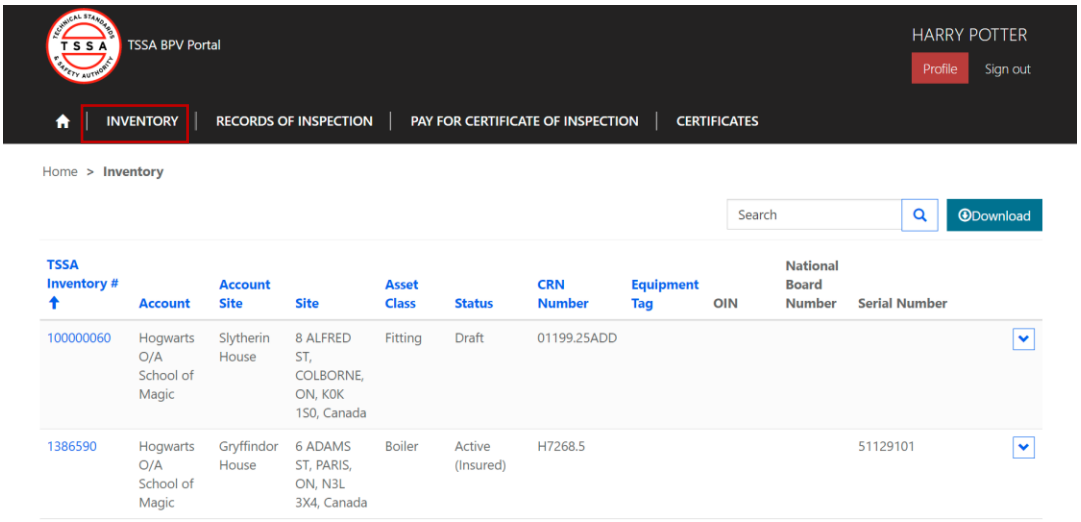


Inventory Page

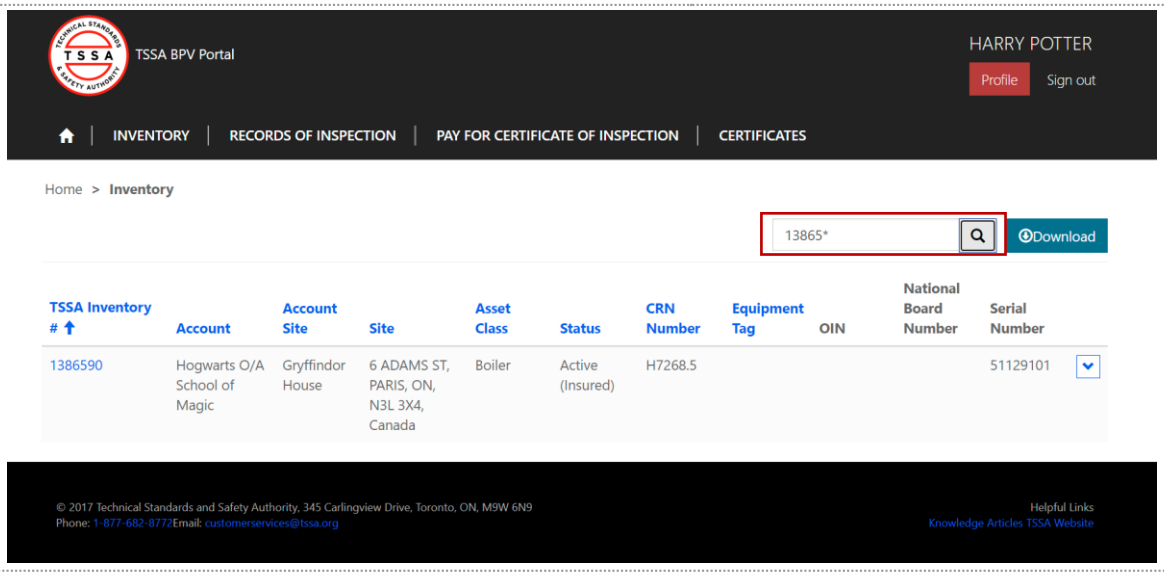
7. Inventory page displays a list of Inventories that the portal user is associated to in TSSA Database.



Searching for Inventories

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

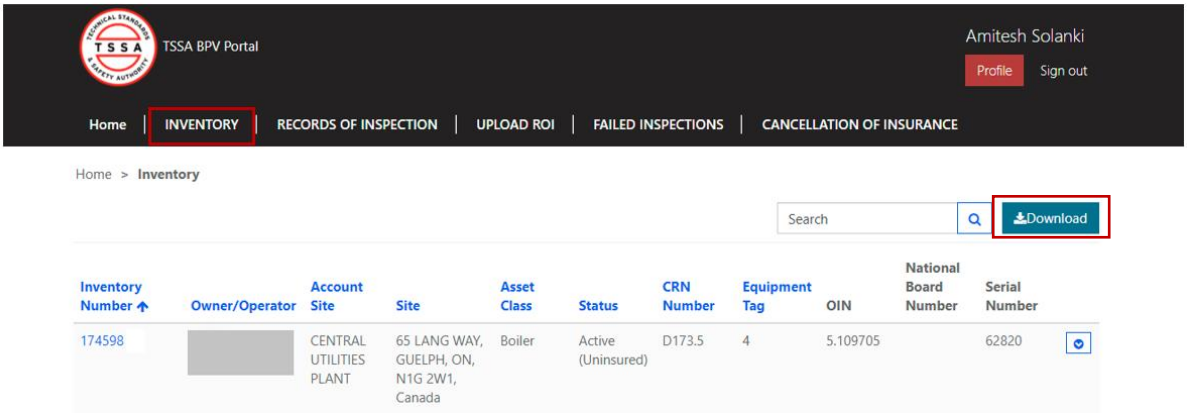
△ *Astrix symbol (*) is used as a wild card in Portal app.Use this to maxiums your search in the database.*



Downloading List of Inventories

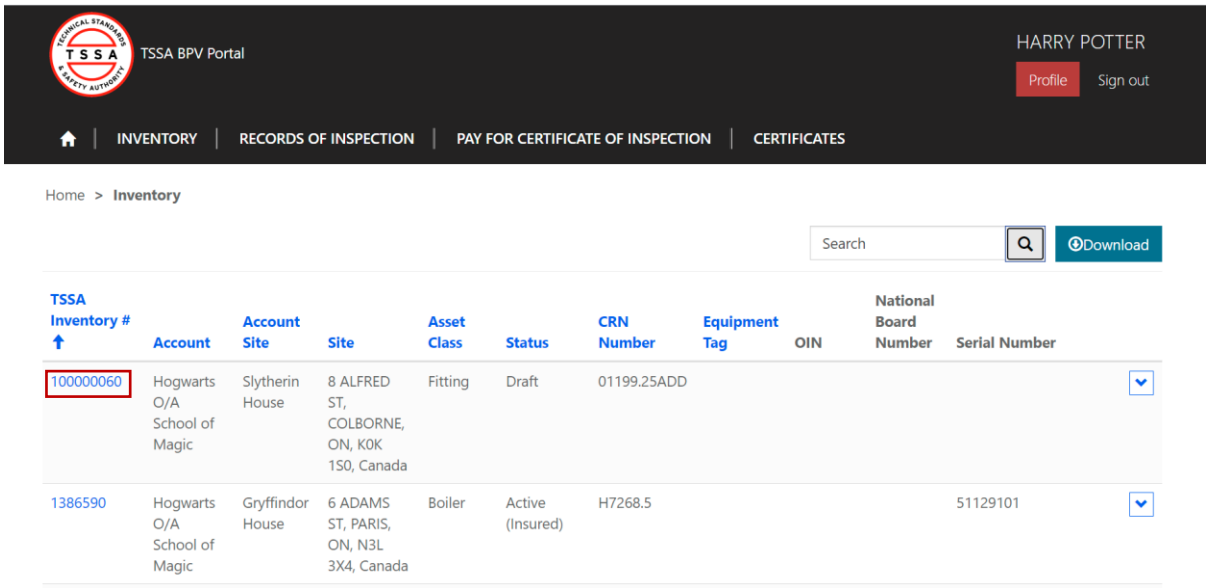
8. To view a full list of your inventories click on the Download button located on far right side of the screen.
   > System will download excel list of inventories
   △ *User can use the excel file to filter by site or owner/operator name*

9.

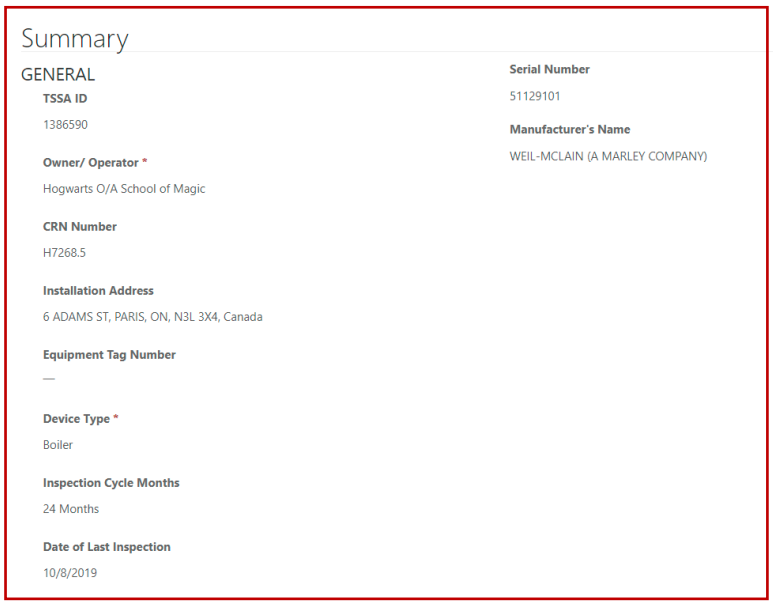


View Details of Inventory

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

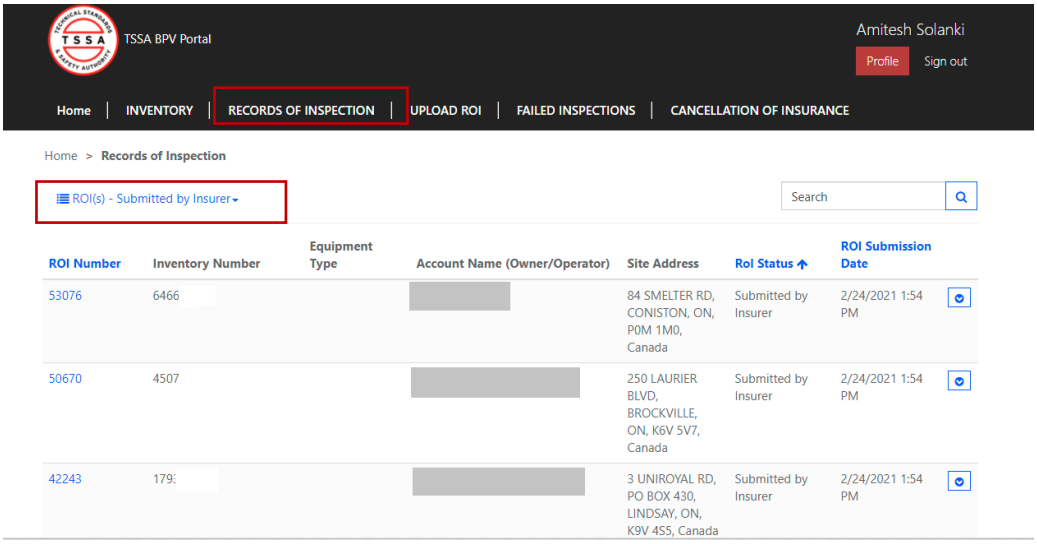


11. Review details of Inventory.



Records of Inspection Page

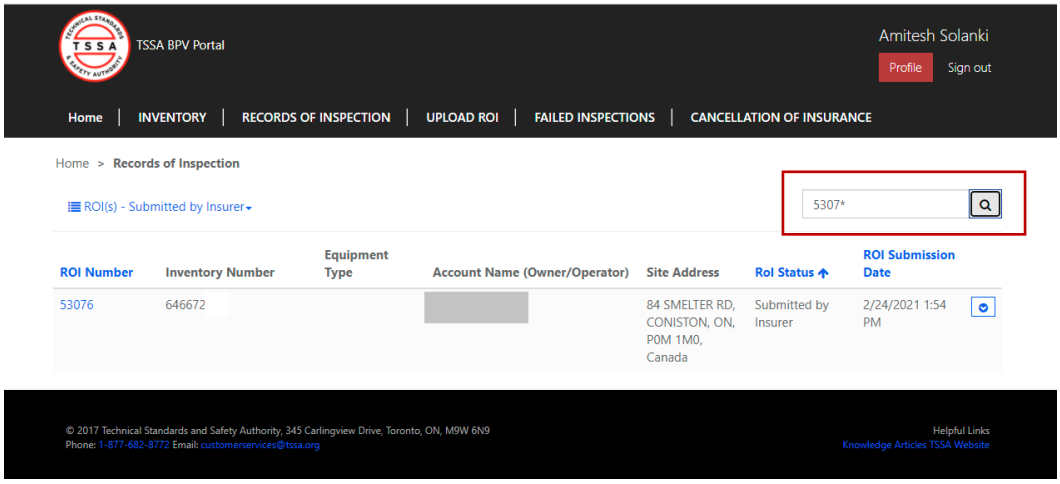
12. To view records inspections submitted click on Records of Inspection tab.
    > System will display records in “submitted by insurer” status on default page



Searching Records of Inspections

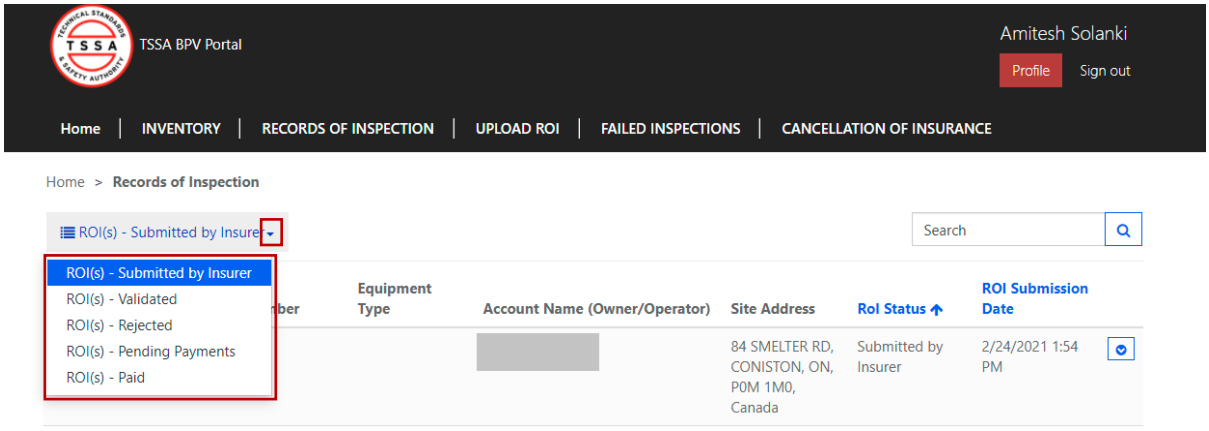
13. Use the quick search bar located at the top right side to find ROI’s.

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



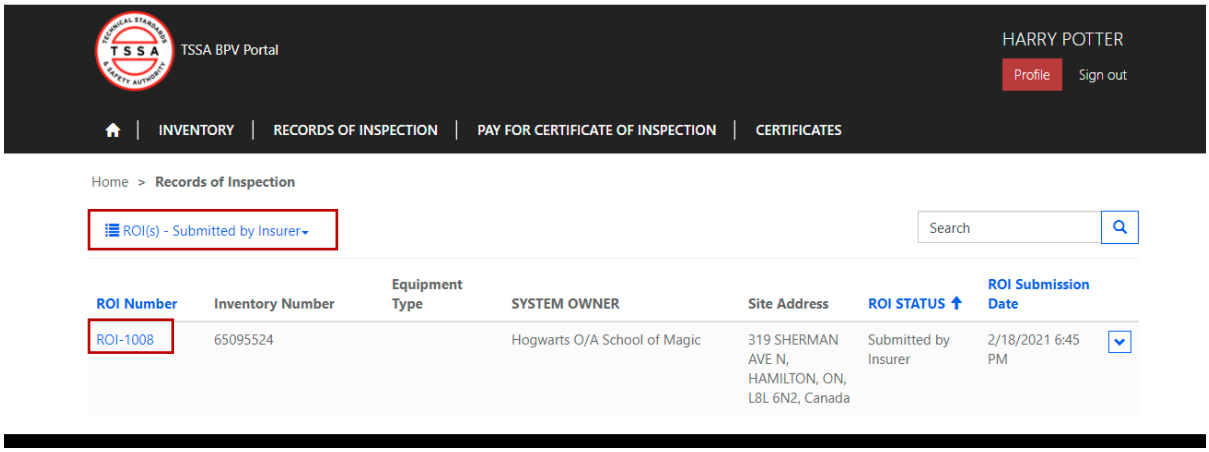
View Records of inspection in different status's

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.



Validate Records of Inspection

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



15.	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

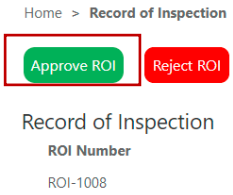
Asset Class *
Pressure Vessel

CRN Number
L4988.5

Serial Number
4014

OIN
—

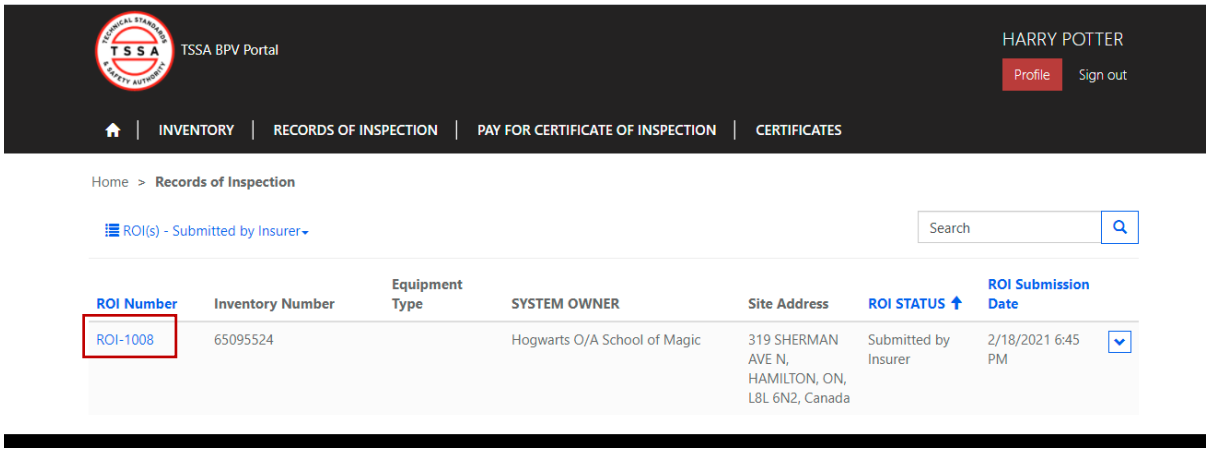
16. Click on the Approve ROI button located at the top of the form, if the information displayed on the form is correct.
    > System will auto update the status of the ROI to Validated and move the record to Validated view.
    > Within Minutes the system will move the Validated record to Pending Payment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



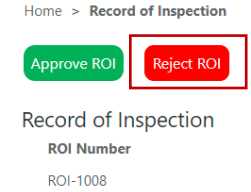
17.

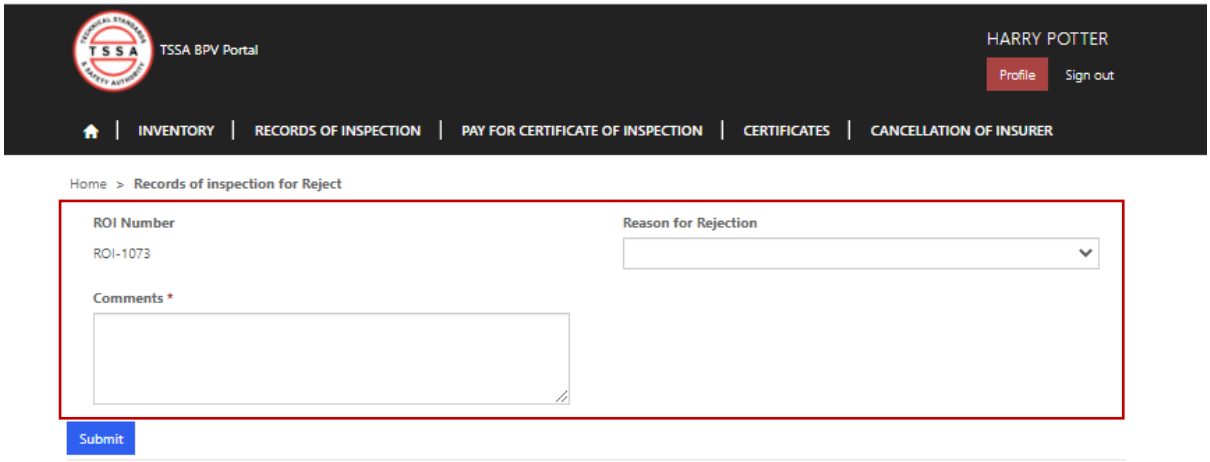
Rejecting Records of Inspection

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



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)





20. Complete the Fields on Form

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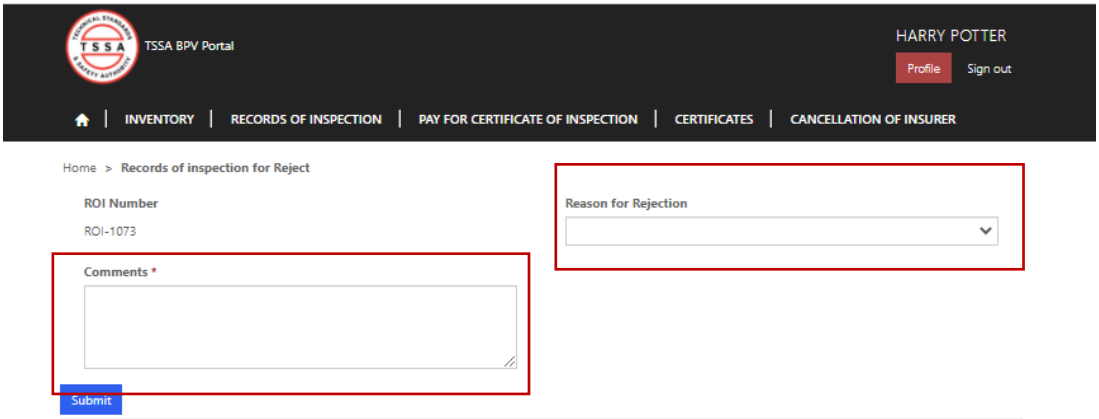
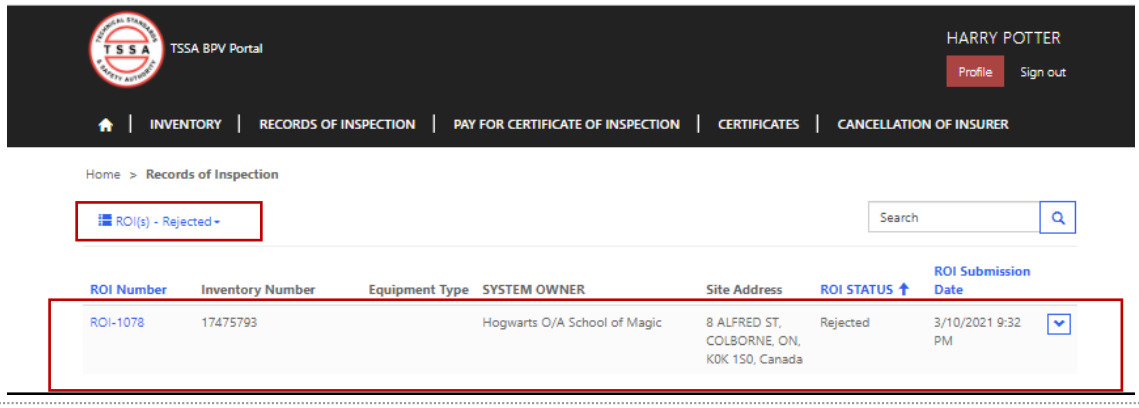
21.



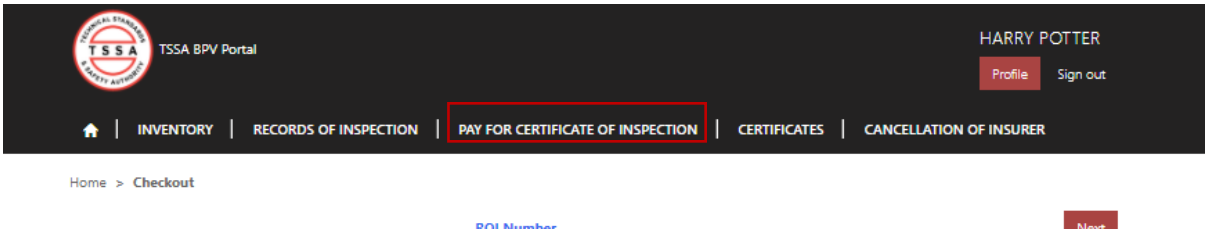
22. Click on Submit button when fields are completed.
> System will automatically updated the status on the Record

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

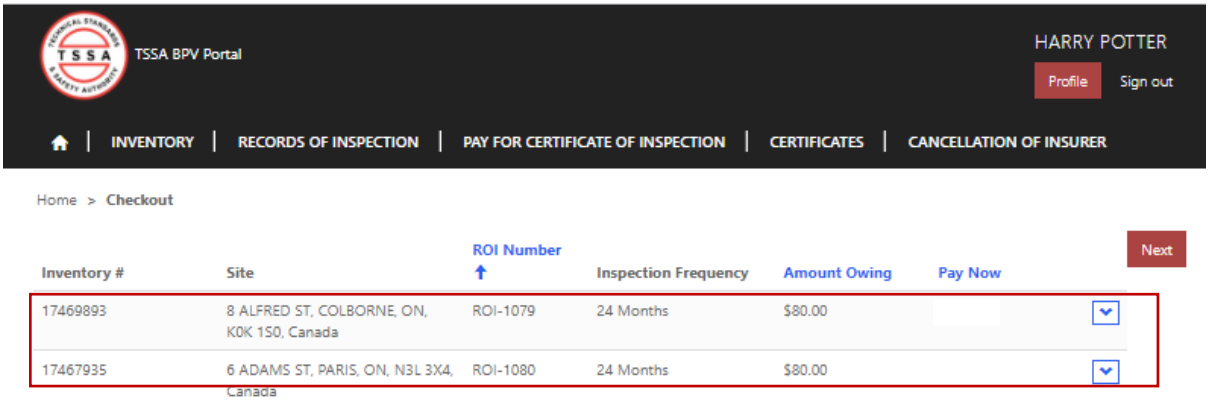


Pay for Certificate of Inspection

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

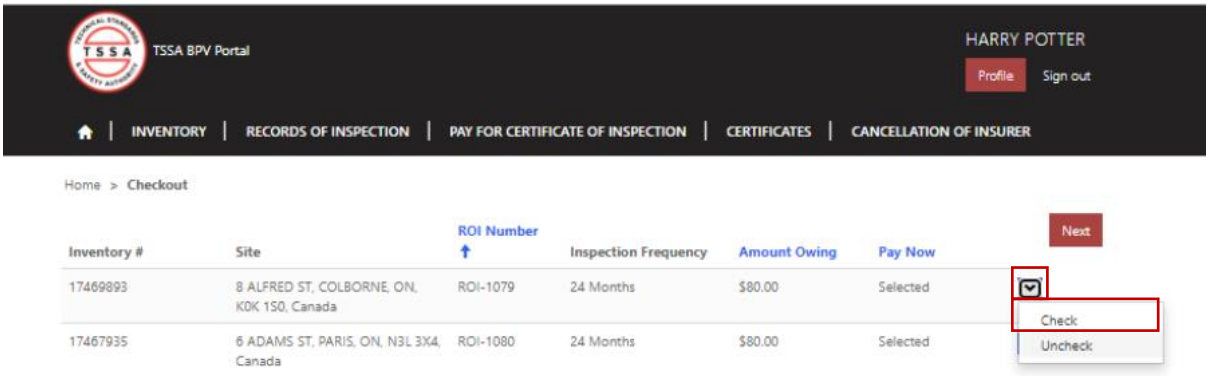


25. System displays records that are pending Payment

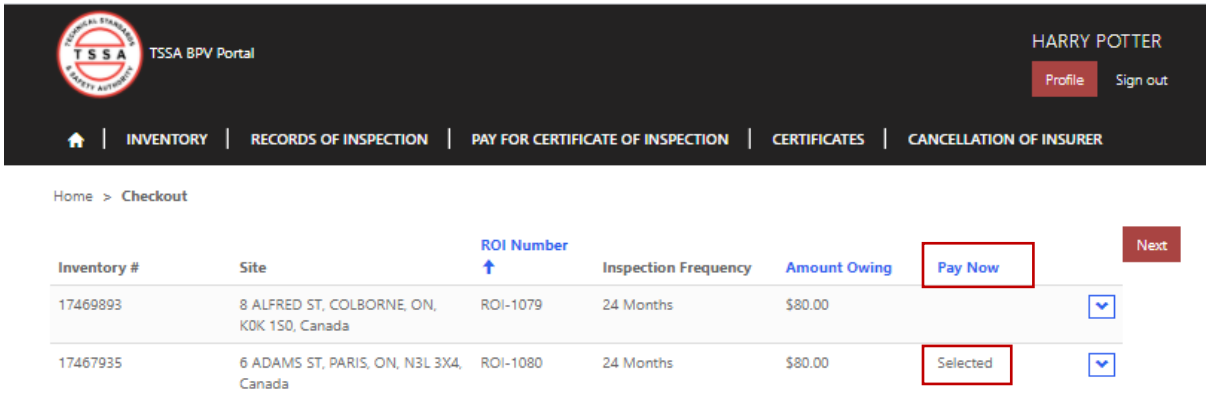


26. To add Checkout items click on the drop down arrow and select “check”

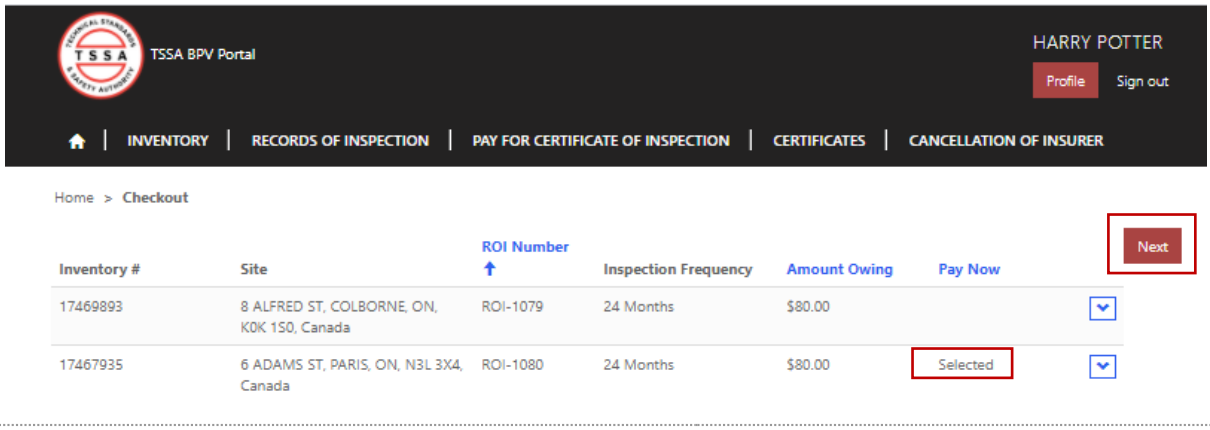
27.



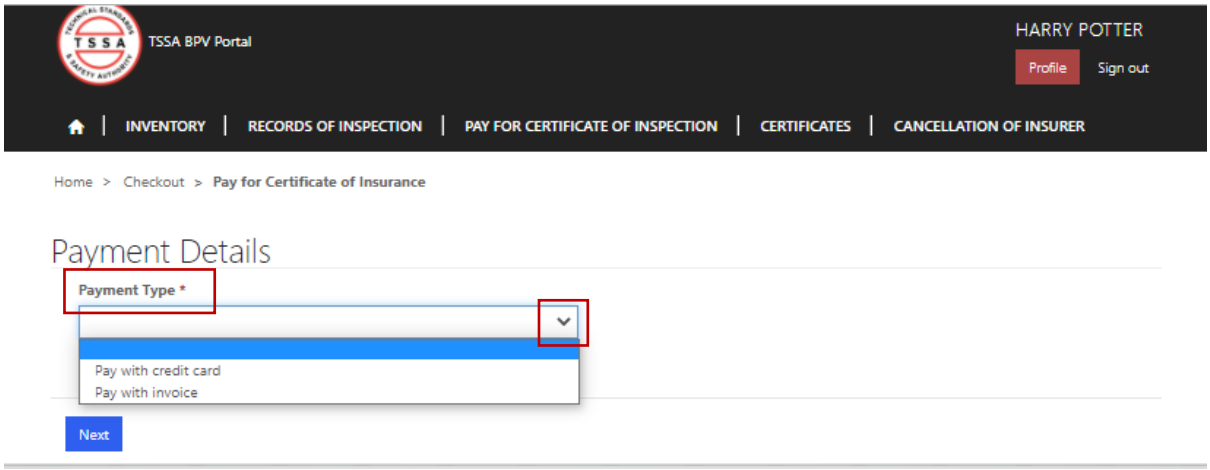
28. System will add value "Selected" under Pay Now column.



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



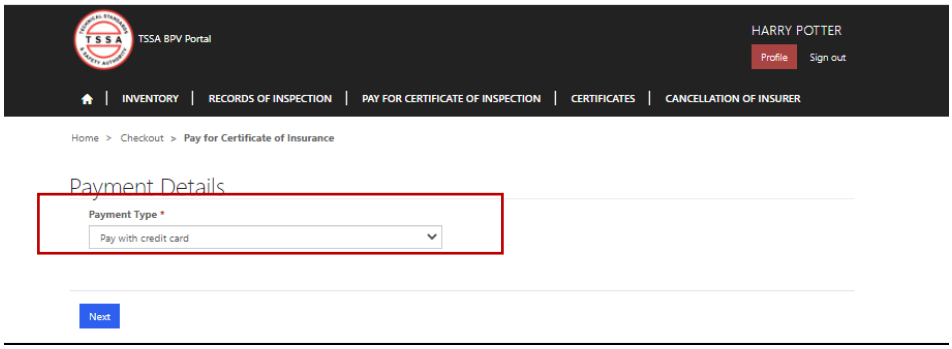
30. Select Payment Type by clicking on the drop down arrow displayed on the field



Pay with Credit Card

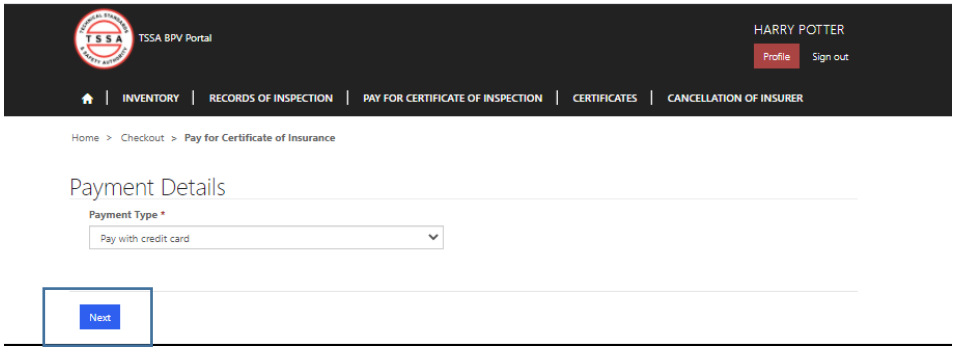
31. Select Pay with Credit Card as Payment Type

△ *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.*

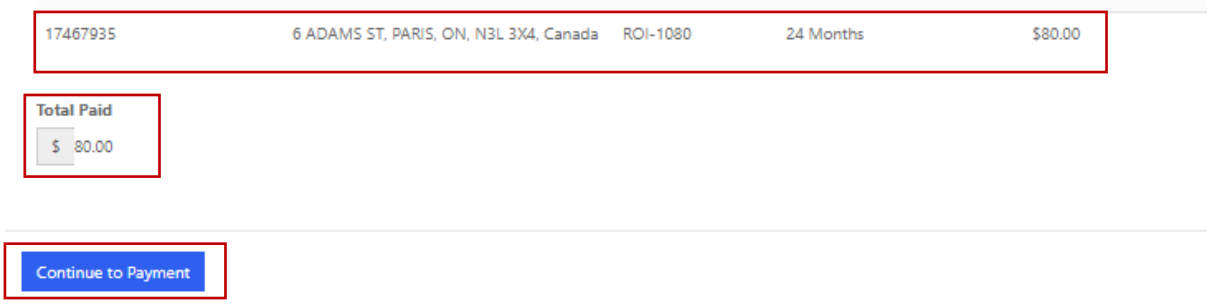


32. Click on "Next" button

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



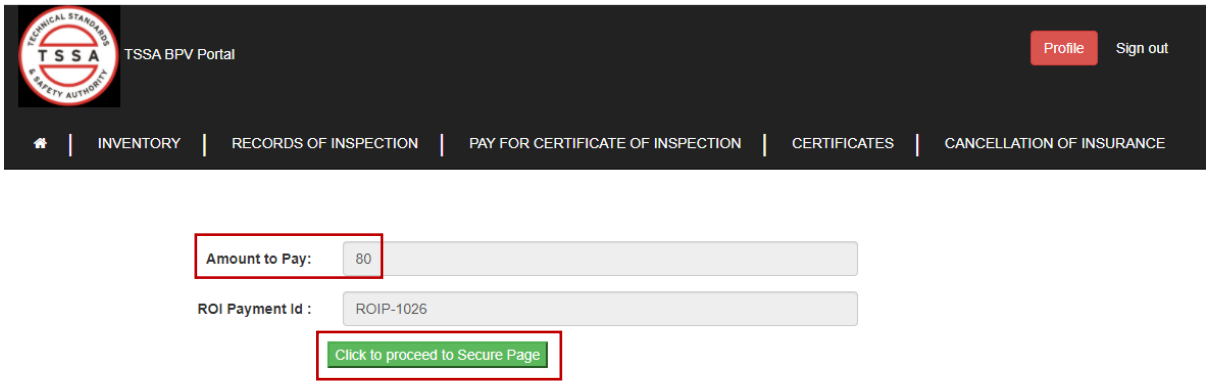
33. Review records displayed and total amount owing. Click on Continue to Payment button to proceed to the next page.



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

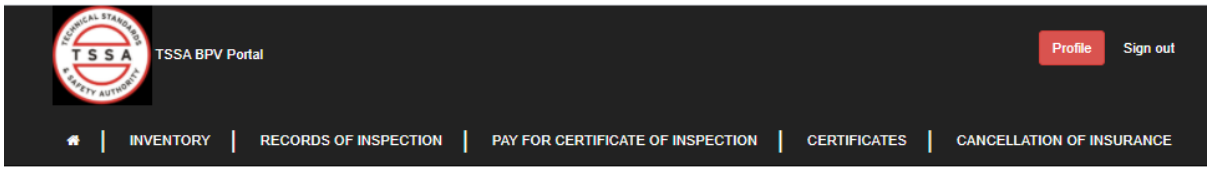
> System will direct users to the Moneris Credit Card Payment page

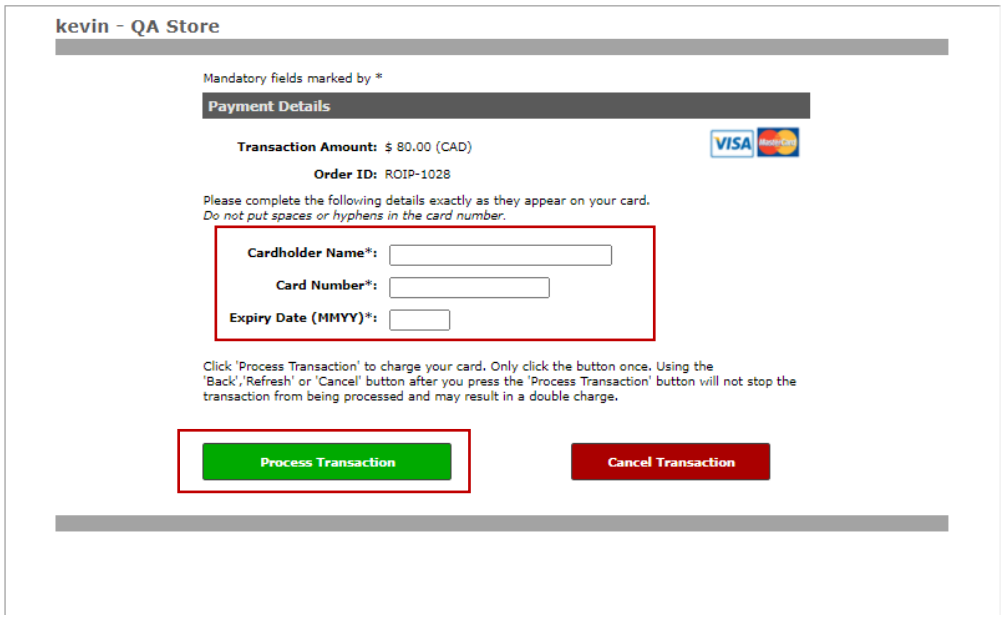
35.



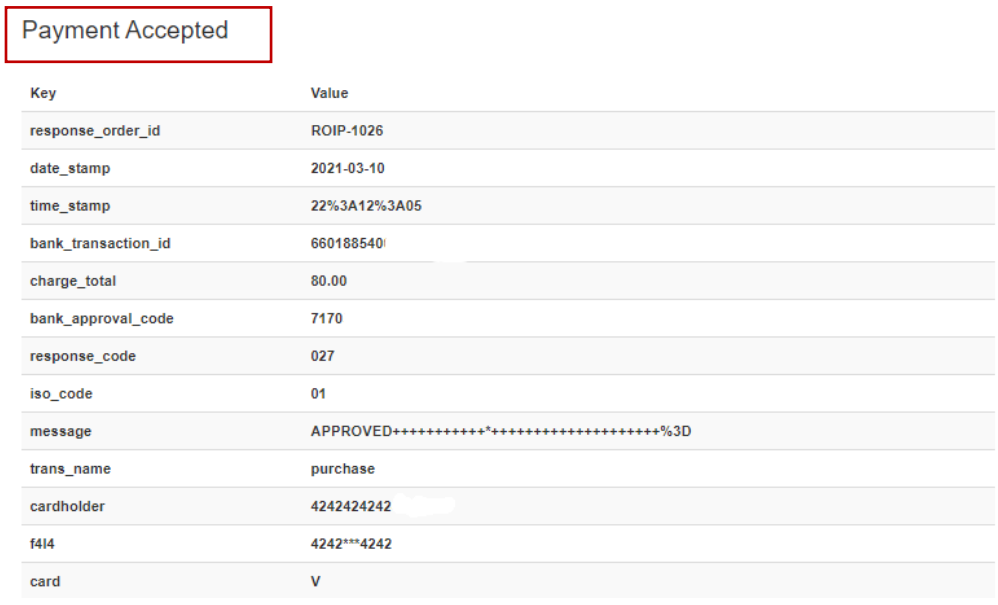
36. Enter your credit card information, and click on Process Transcation button.

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





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

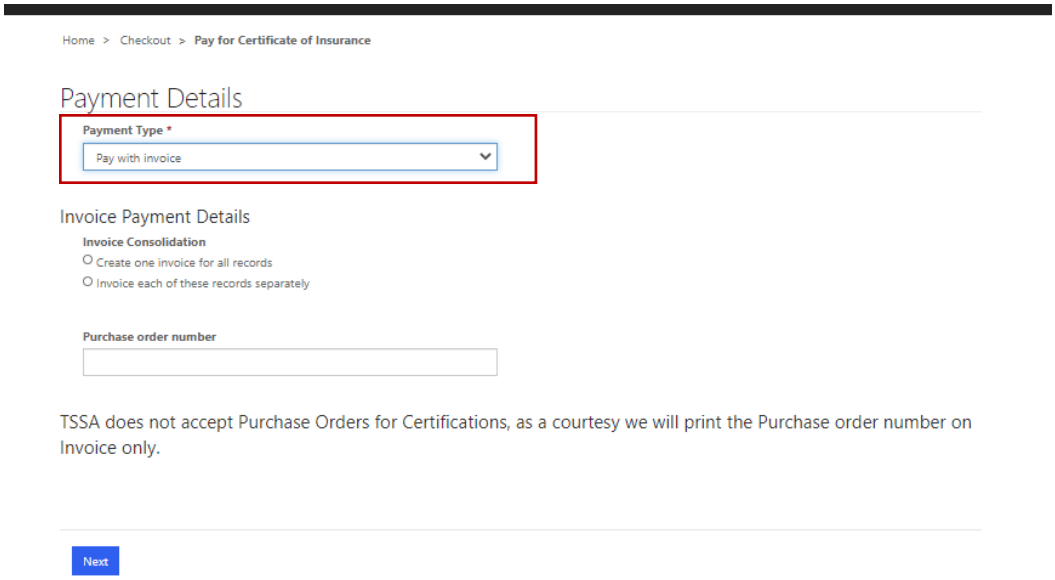


Payment Accepted

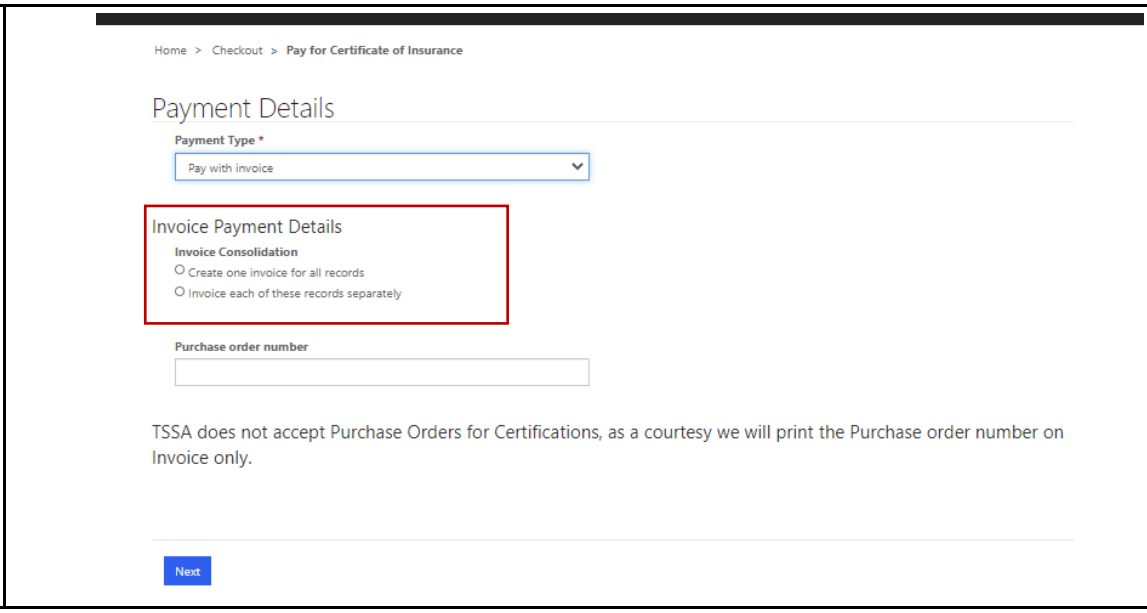
Key	Value
response_order_id	ROIP-1026
date_stamp	2021-03-10
time_stamp	22%3A12%3A05
bank_transaction_id	660188540
charge_total	80.00
bank_approval_code	7170
response_code	027
iso_code	01
message	APPROVED++++++++++*++++++++++++++++++%3D
trans_name	purchase
cardholder	4242424242
f4l4	4242***4242
card	V

38. # Pay with Invoice

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

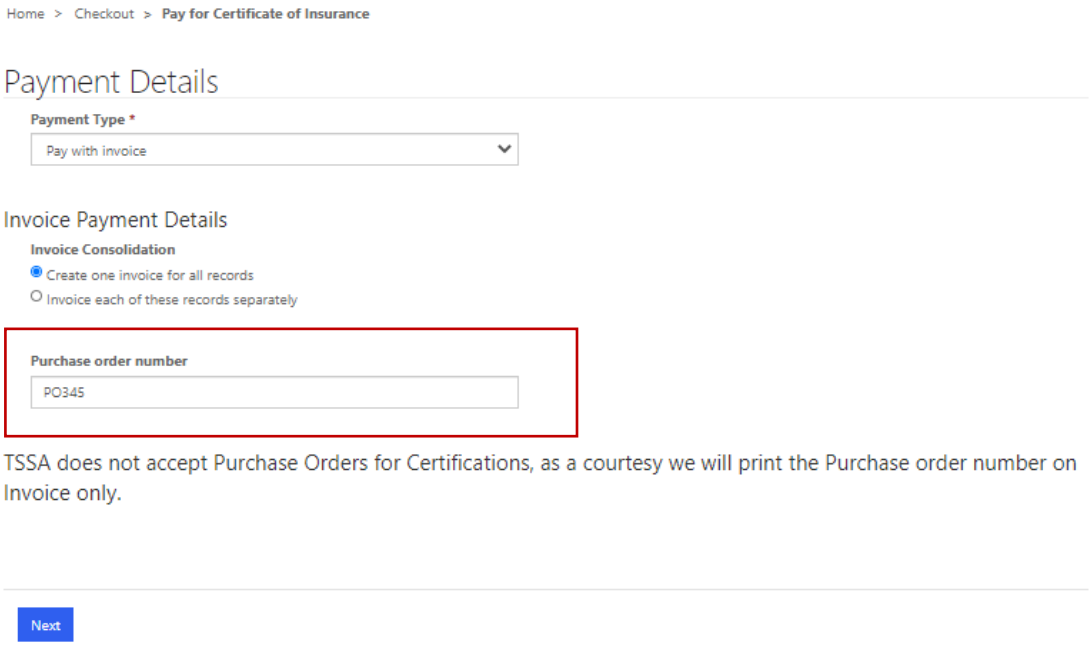


40. Select an option under Invoice Payment Details



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.*

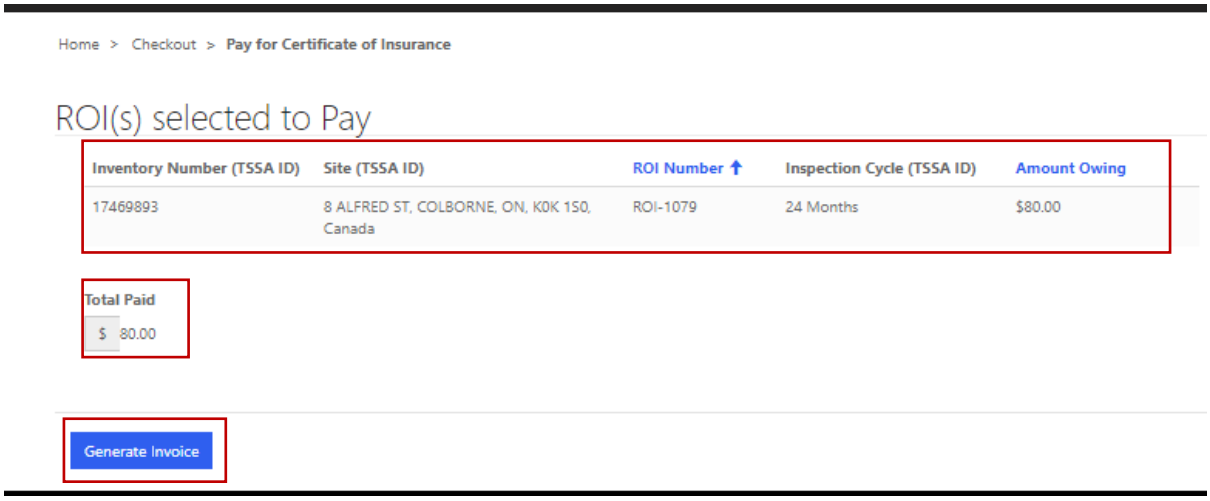


42. Click on Next button, at the bottom of the form.

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

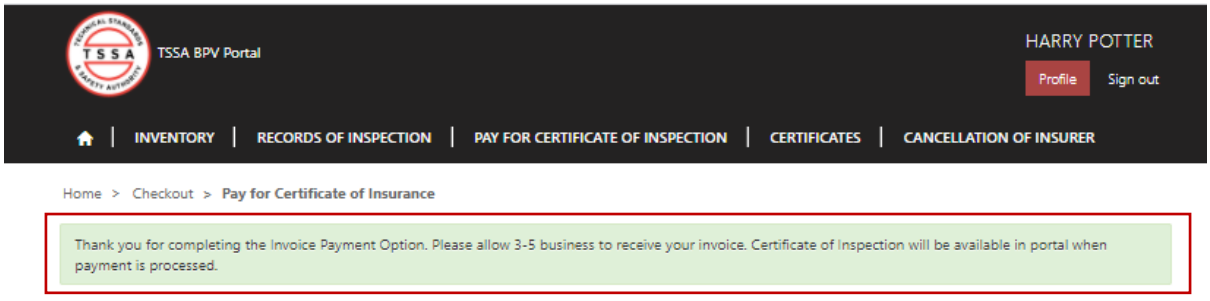
    Click on Generate Invoice button.

44.



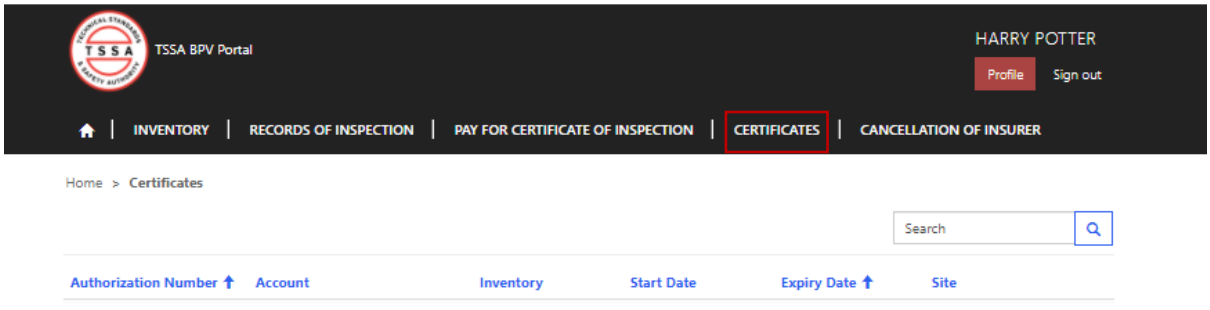
45. Confirmation Notice will be displayed.

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



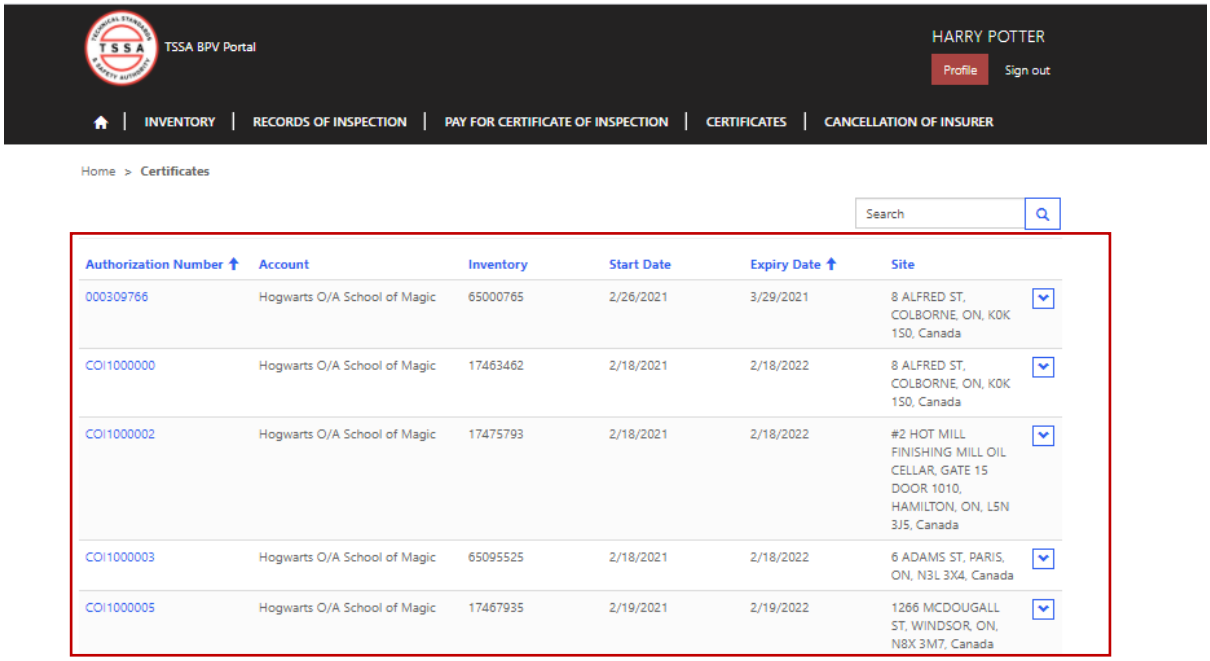
Certificates

46. Click on Certificates tab located on the menu bar

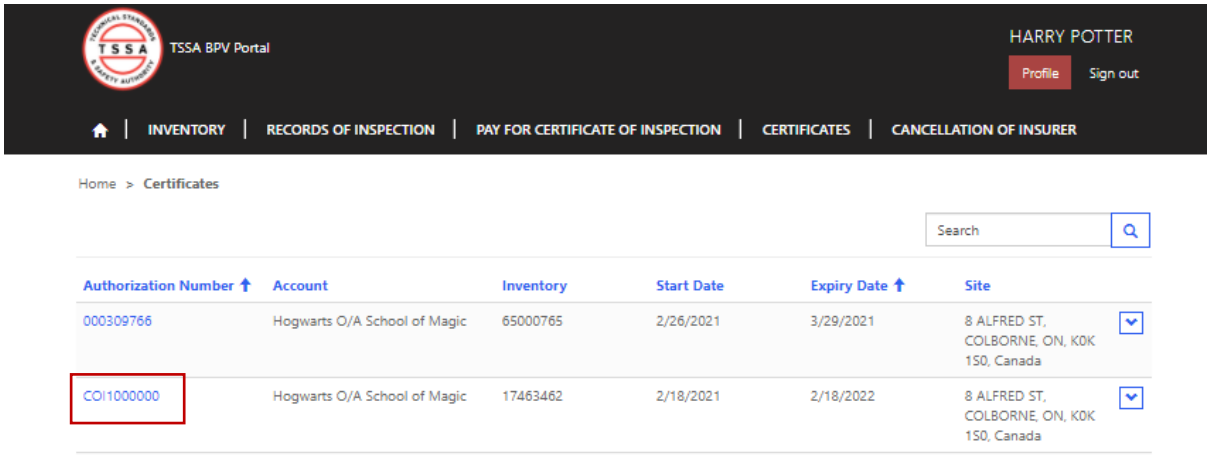


47.

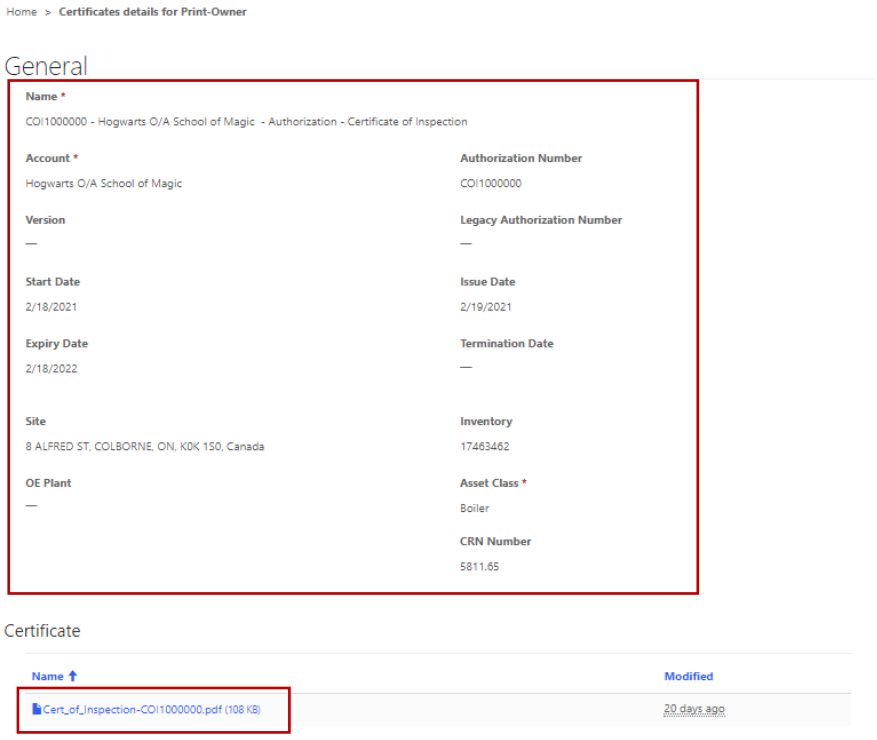
48. System displays list of all paid Certificates associated to the User



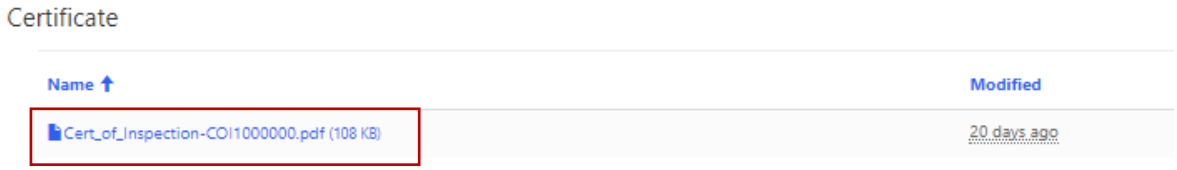
49. Click on the Authorization Number
> System will redirect user to Certificate detail page



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



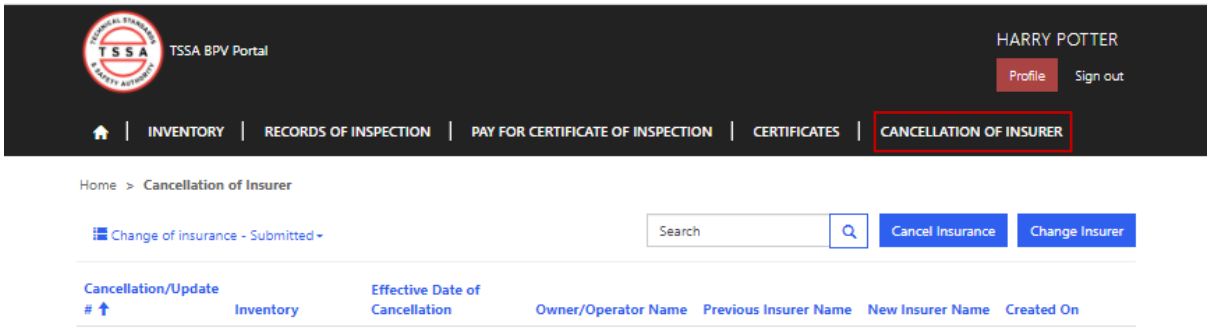
51. To download a copy click on the Cerifiacte link
> System will download a pdf copy to the computer



52. Click on the downloaded file to open the Certificate

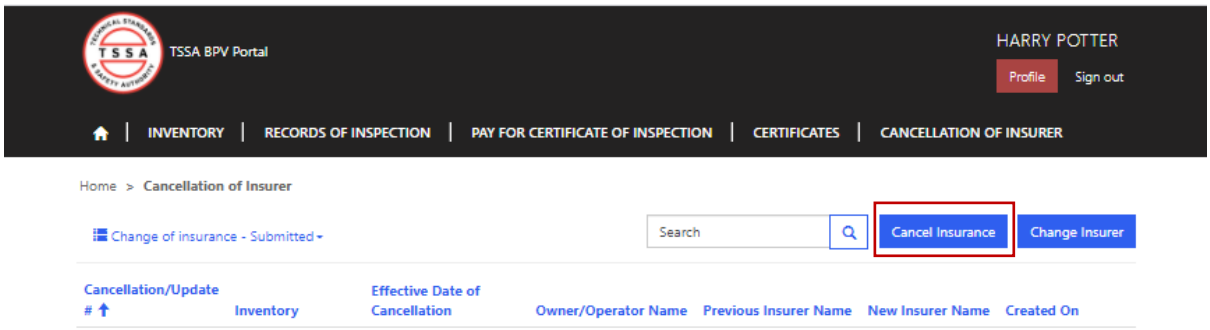
Cancellation of Insurer

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

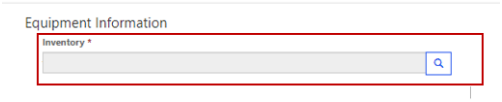


Cancel Insurance

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

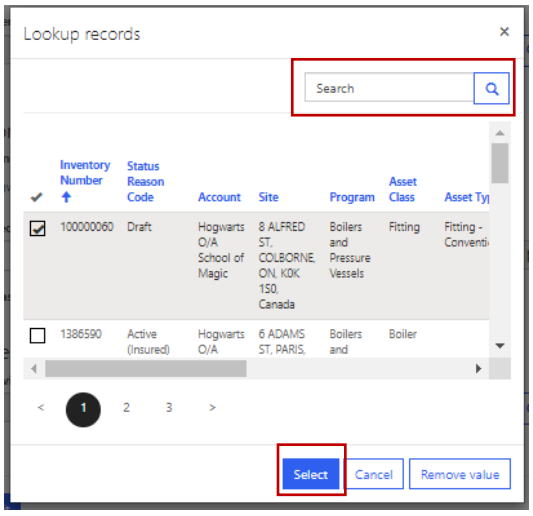


55. Click on the magnifying glass located on inventory field
> System will displays a window with a list of inventories that are associated to the user

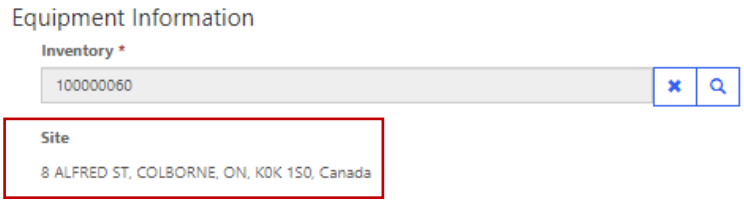


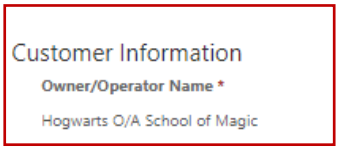
56. Use the search bar to find the inventory in our data base.
> System will displays a check mark next to the selected Inventory

Click on Select button located at the bottom of the window



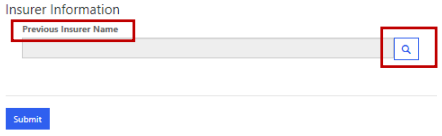
57. System auto displays Site Address and Owner/Operator of the device.





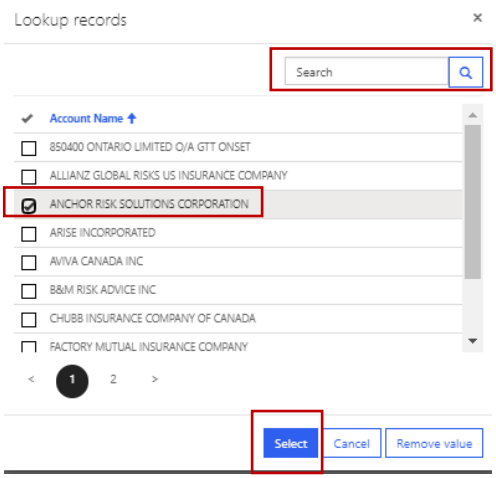
58. Complete the Effective Date of Cancellation Field.

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

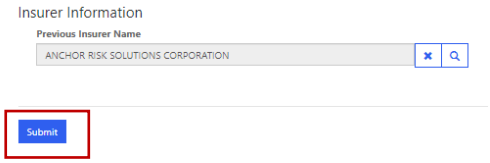


60. Use the search bar to find the insurer name in our data base.
    > System will displays a check mark next to the selected Inventory

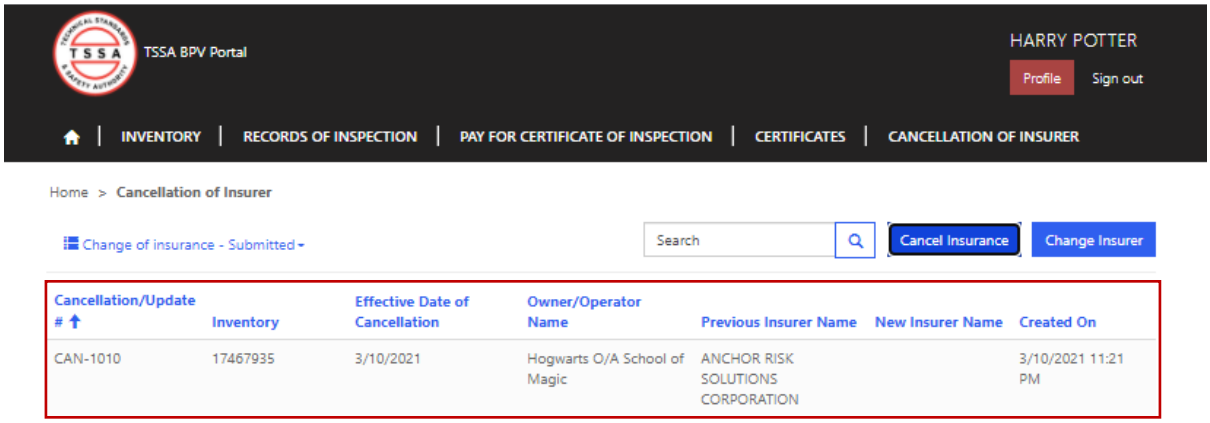
    Click on Select button located at the bottom of the window



61. Click on the Submit button located on the form

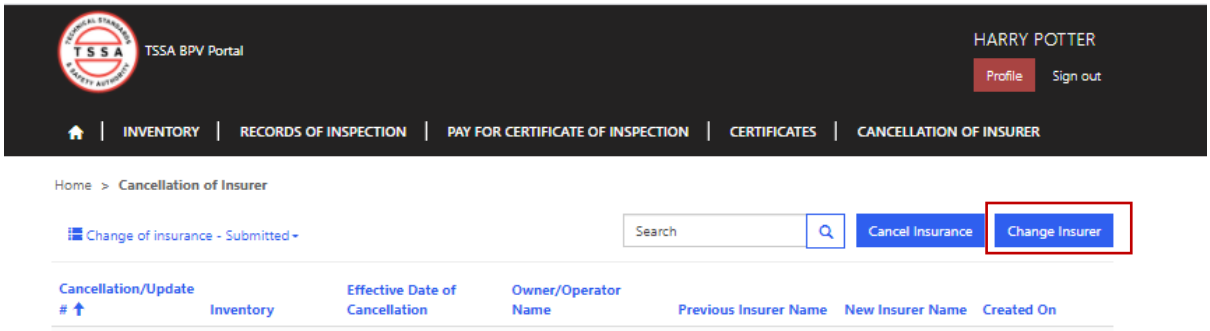


62. System will display the submitted record on Cancellation of Insurer Page



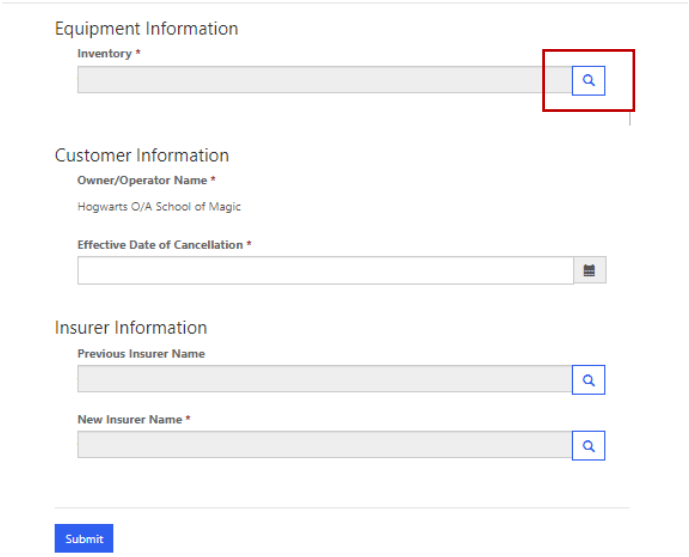
Change Insurer

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



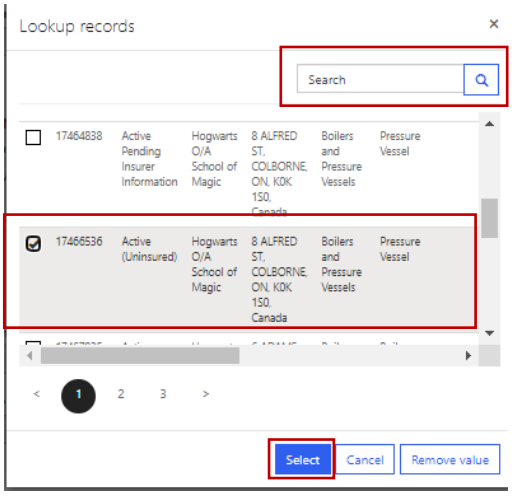
64. Click on the magnifying glass located on inventory field
    > System will displays a window with a list of inventories that are associated to the user

65.

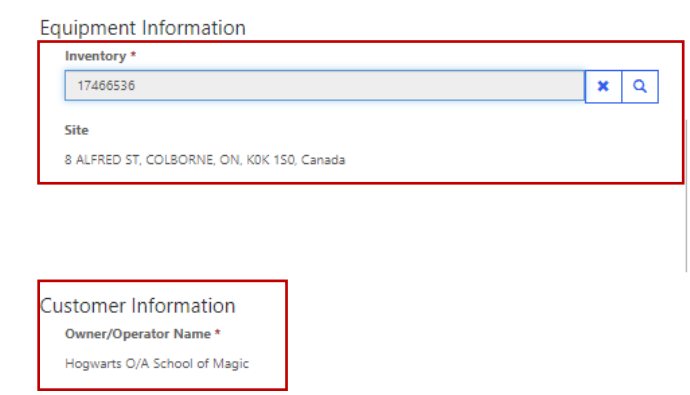


66. Use the search bar to find the inventory in our data base.
> System will displays a check mark next to the selected Inventory

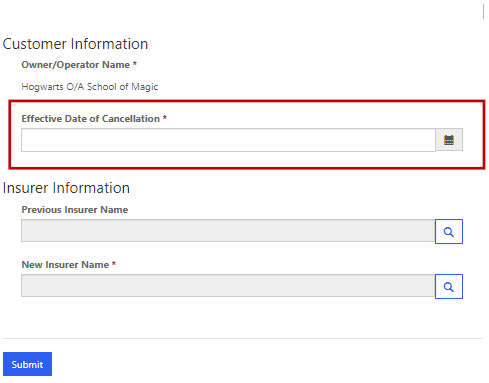
Click on Select button located at the bottom of the window



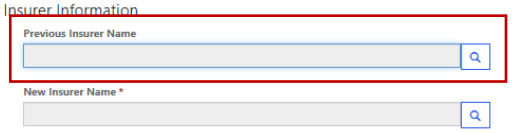
67. System auto populates Site Address and Owner/Operator of the device.



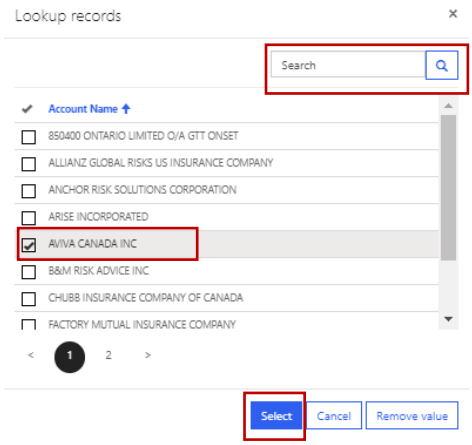
68. Complete the Effective date of Cancellation Field



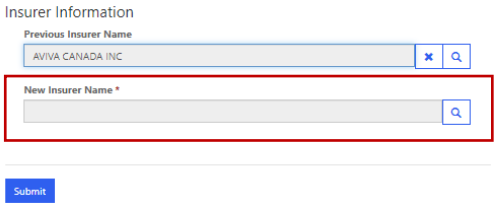
69. Click on the magnifying glass icon next to the Previous Insurer Name
> System will launch the lookup records of Insurer's listed in TSSA data base



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

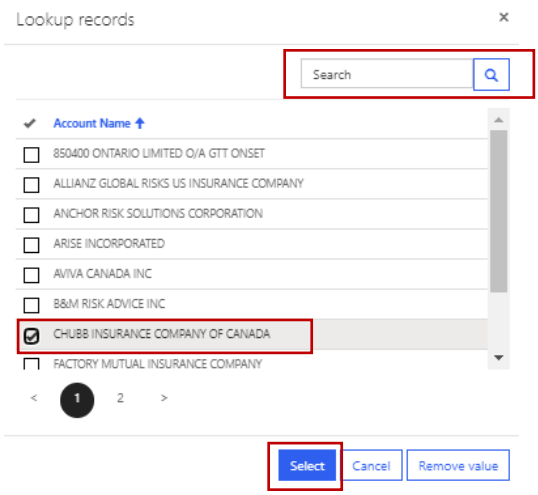


71. Click on magnifying glass located on the New Insurer Name field
> System will launch the lookup records of Insurer's listed in TSSA data base

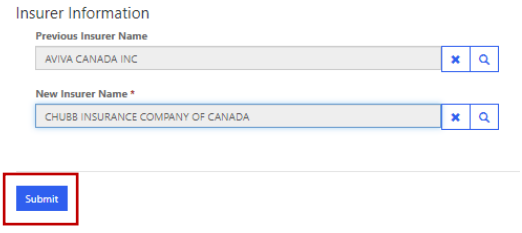


72. Use the search bar to find the insurer name in our data base.
> System will displays a check mark next to the selected Inventory

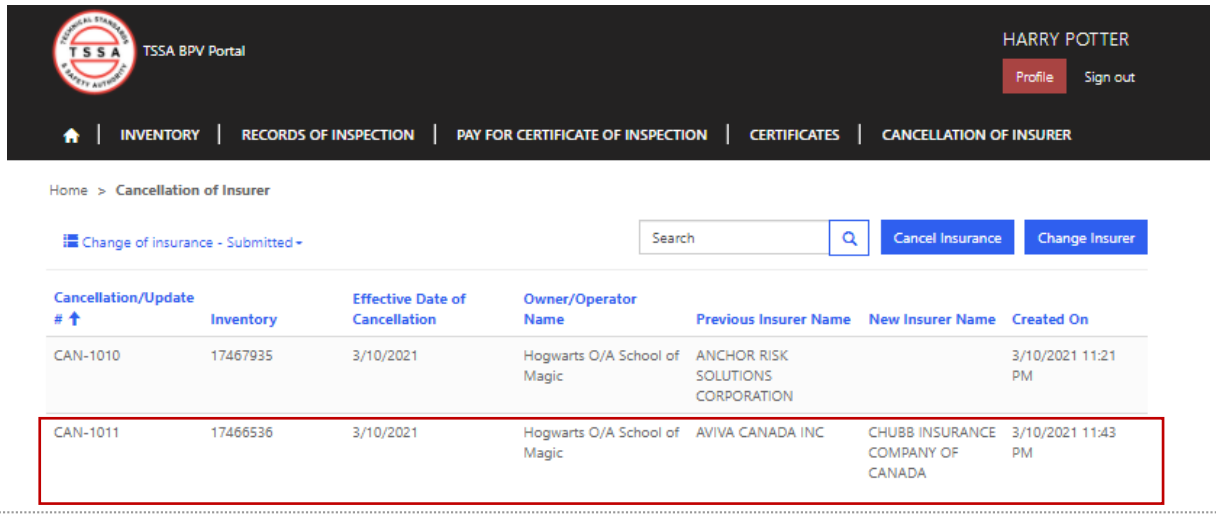
Click on Select button located at the bottom of the window



73. Click on the Submit button



74. System will display the submitted record on 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 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