

TSSA PORTAL TRAINING GUIDE

Work Instructions and Screenshots to Manage Logins, Submit a
Record of Inspection and a Cancellation of Insurance Notification

Insurer Processes
Version April 2019



Table of Contents

Contents

1.1 Redeem Invitation	2
1.2 Reset Password	5
1.3 Manage Profile	7
2.1 Submit Record of Inspection (ROI) – Bulk Upload.....	8
2.2 Submit Record of Inspection (ROI) – Populate Electronic Form	12
3.1 Submit Cancellation of Insurance Notification – Bulk Upload	15
3.2 Cancellation of Insurance Notification – Populate Electronic Form	17
Record of Inspection List of Values	19



1.1 Redeem Invitation

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

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

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

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

A screenshot of the TSSA portal's 'Redeem Invitation' page. The top of the page features the TSSA logo and the text 'TECHNICAL STANDARDS & SAFETY AUTHORITY'. Below this, there are two tabs: 'Sign In' and 'Redeem Invitation', with the latter being the active tab. The main heading is 'Sign up with an invitation code'. There is a red asterisk followed by the label 'Invitation Code' and a text input field containing a long URL: 'nUrl=%2Fcertificate-of-inspection%2FRegister?returnUrl=%2Fcertificate-of-inspection%2FRegister?returnUrl=%2Fcertificate-of-inspection%2F'. Below the input field is a blue 'Register' button.

Register a New Account

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

This is a screenshot of a web application's registration page. At the top left, there are two links: 'Sign In' and 'Redeem Invitation'. Below these links, a light blue box contains a long alphanumeric redemption code: 'ieEAPUhv2tywyrVjLdvx4-pAZr5yRy-zMFLYMy0x48uLDui9Q4fntmG8lpEziJKSYrXCmqM1XnujbE3v3-hJYk2yC6A9zJZaMMfNnCRS4NFQNi9vIVXISTBKCS4GWjniHzW6r8pCD2EkwOMg0s5mzC9KEy9oTOwCyZvj6CdIfY-'. Below the code, the text 'Register for a new local account' is displayed. The registration form includes three input fields: 'Business Email' with the value 'test@tssa.org', 'Password', and 'Confirm Password', all of which are masked with dots. A blue 'Register' button is positioned below the 'Confirm Password' field.

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

Validate your Profile

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

The system should have sent a Confirm your Account Email Notification

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




TECHNICAL STANDARDS
& SAFETY AUTHORITY

Email Validation Button

Email Validation Confirmation

Profile

 jessica myrie

Profile

Security

Change Password

Your Information

General

First Name *

Last Name *

E-mail

Business Phone

Company Name
JESSICA TEST OWNER

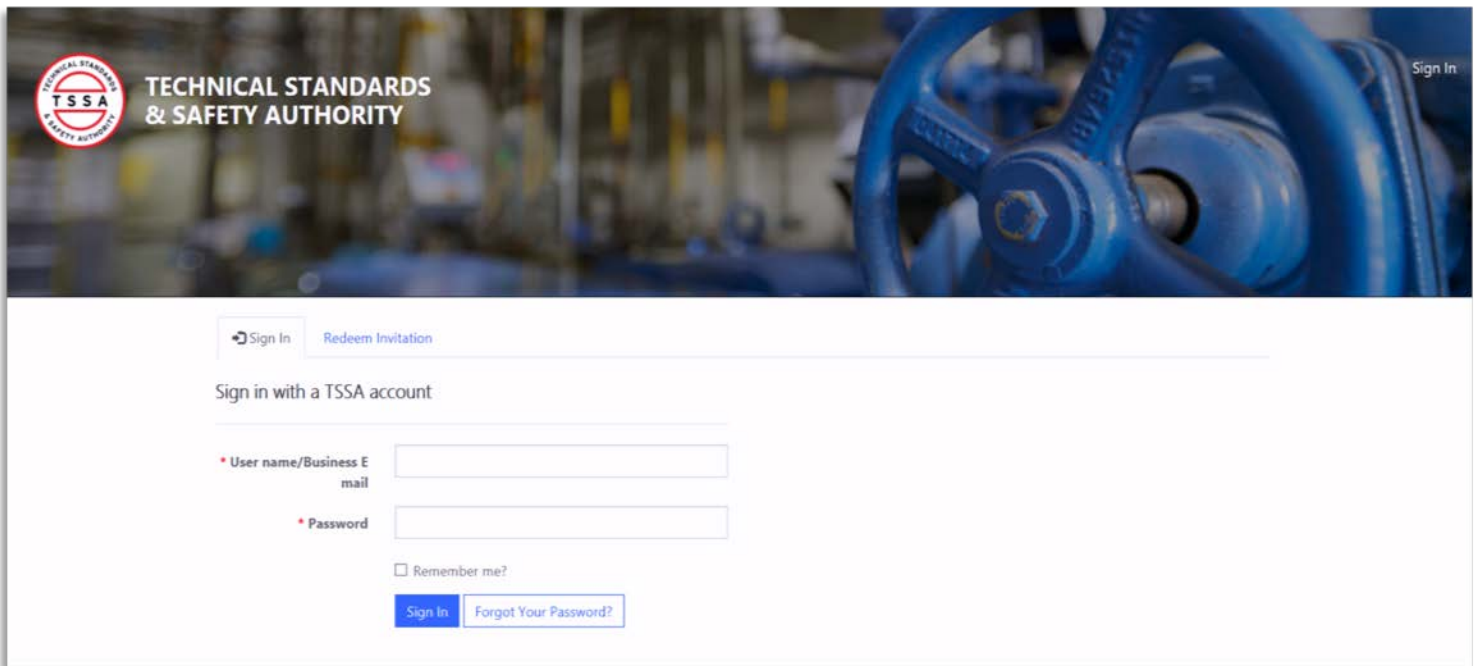
Your email has been confirmed successfully. ✕



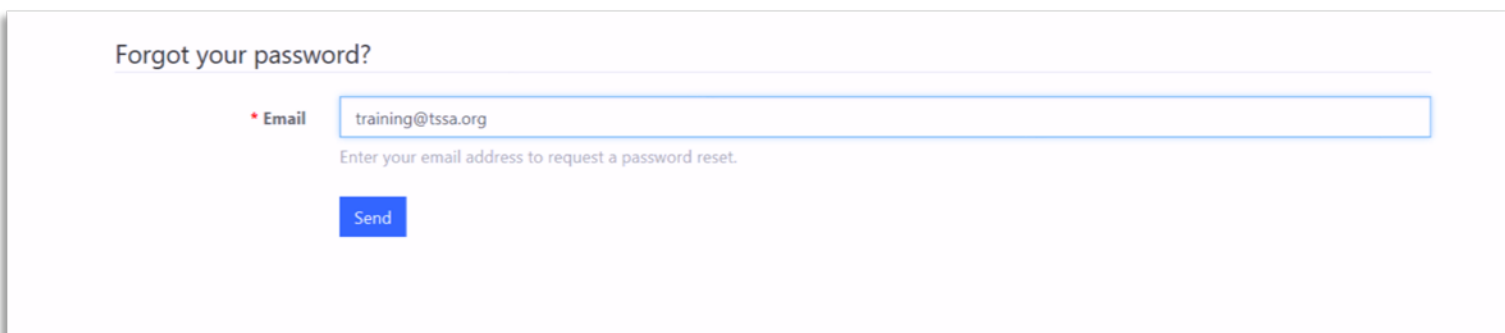
1.2 Reset Password

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

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

This is a screenshot of the TSSA login page. At the top left is the TSSA logo. To its right, the text 'TECHNICAL STANDARDS & SAFETY AUTHORITY' is displayed. In the top right corner, there is a 'Sign In' link. Below the header, there are two buttons: 'Sign In' and 'Redeem Invitation'. Underneath, the text 'Sign in with a TSSA account' is shown. There are two input fields: one for 'User name/Business Email' and one for 'Password'. Below the password field is a 'Remember me?' checkbox. At the bottom of the form are two buttons: 'Sign In' and 'Forgot Your Password?'.

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

This is a screenshot of the 'Forgot your password?' form. The title 'Forgot your password?' is at the top. Below it is a single input field for 'Email' with the text 'training@tssa.org' entered. Below the input field is the instruction 'Enter your email address to request a password reset.' At the bottom of the form is a blue 'Send' button.



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

Forgot your password?

Please check your email to reset your password.

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

Reset Password

New Password

Confirm New Password

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

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

This is a screenshot of the TSSA sign-in page. At the top left, there are two buttons: 'Sign In' with a left-pointing arrow and 'Redeem Invitation'. Below these is the heading 'Sign in with a TSSA account'. There are two input fields: the first is labeled 'User name/Business E mail' and contains the text 'test@tssa.org'; the second is labeled 'Password' and contains a series of dots. Below the password field is a checkbox labeled 'Remember me?'. At the bottom of the form are two buttons: 'Sign In' and 'Forgot Your Password?'. The entire form is enclosed in a light gray border.

1.3 Manage Profile

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


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



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



Profile



Khadija Fadhlouli

Profile

Security

Change Password

Your Information

General

First Name *	<input type="text" value="Khadija"/>	Last Name *	<input type="text" value="Fadhlouli"/>
E-mail	<input type="text" value="kfadhlouli@tssa.org"/>	Business Phone	<input type="text" value="416-734-3536"/>
Company Name	<input type="text" value=""/>		

2.1 Submit Record of Inspection (ROI) – Bulk Upload

1. If you wish to submit a “Bulk Upload” please ensure that you are using the established template, “Record of Inspection Template”, which is available on the Portal.
2. When completing the “Bulk Upload” template, please ensure that you are following the established formats below, prior to moving to Step #3.

TSSA ID

- The TSSA ID assigned to the equipment must be entered as it was provided by TSSA, no other format will be accepted by the system.
- Example of format: “65050831”, “65050831”, “65050831”

Installation Address – Full Canada Post Address (Street, City, Province, Postal Code)

- The complete installation address postal code must be entered as a recognized Canada Post Address, no other format will be accepted.
- Example of format: “345 CARLINGVIEW DR ETOBICOKE ON M9W 6N9”, “1 BLUE JAYS WAY TORONTO ON M5V 1J3”

MAWP (psi)

- This is a mandatory value and must be entered as a numerical value.
- Example of format: “100”, “200”, “350”



Owner / Operator Name

- The “Owner / Operator Name” name must be exactly as it was provided to TSSA, short forms, acronyms, etc. will not be accepted by the system.
- It is important to note that special characters, i.e. “,”, will not be accepted by the system.
- Example of format: “Technical Standards and Safety Authority “2380178 Ontario Limited”

Insurer Name

- The “Insurer Name” must reflect the Legal Name/Entity, short forms, acronyms, etc. will not be accepted by the system.
- Example of format: “BI&I”, “Aviva Canada Inc.”, “Intact Insurance”, “TSSA”

Inspection Agency

- The “Inspection Agency” must reflect the Legal Name/Entity, short forms, acronyms, etc. will not be accepted by the system.
- Example of format: “GTTOOnSET”, “Intact Insurance”, “TSSA”

Inspector Name

- The inspector name must be entered exactly as it is written on the certificate issued by TSSA, short forms, etc. will not be accepted by the system.
- Example of format: As defined on the Inspectors Ontario Certificate of Qualification

TSSA Issued Inspector Certificate Number (COC)

- The COC number must be entered exactly as it is written on the certificate issued by TSSA.
- Example of format: “CC123”, “CC00123”, “000315452”

Inspection Date

- The date format must be entered as YYYY-MM-DD, for example: All other formats will not be accepted by the system.
- Example of format: “2018-09-04”, “2019-04-30”

Inspection Type

- The inspection type must be entered as eight (8) characters, either “Internal” or “External”, no other special characters, spaces, cursor returns, or characters that exceed the total allowable will be accepted by the system.
- For example: “Internal ” or “External ” will not be accepted by the system as there is space entered after the inspection type (as highlighted in red).

Inspection Status

- The inspection status must be entered as “Pass” or “Conditional Pass”, no other special characters, spaces, cursor returns, etc. will be accepted by the system.
- For example: “Pass ” or “Conditional Pass ” will not be accepted by the system as there is a space entered after the inspection status (as highlighted in red).

NB Violation Category

- If multiple violations will be entered, they must be separated by a semi-colon (;) to be accepted by the system.
- Example of format: “1.1; 1.5”

CRN #

- The CRN number must be submitted as a complete and valid CRN.
- Example of format: “M0487.5”, “F0378.5”, “K4096.5”

Serial Number

- The serial number for the equipment must be submitted as it is outlined on the equipment.



- Example of format: “7745191800023100”, “385024”, “051520966”

Contact Name

- This must be submitted as a complete First/Last Name for the responsible party of the Owner/Operator.
- Example of format: “John Smith”, “Jane Doe”

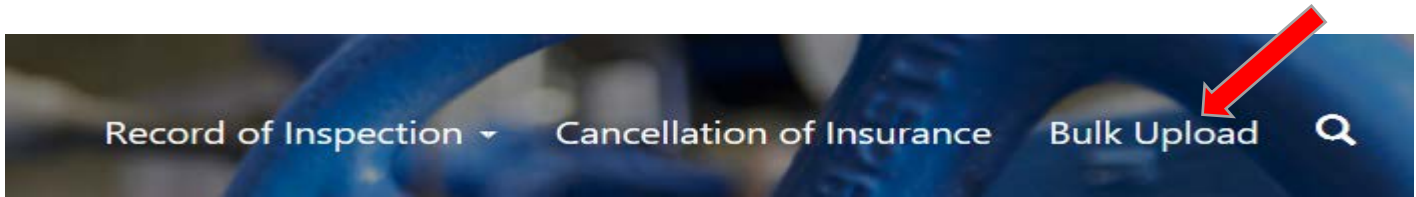
Contact Phone Number

- This must be submitted as a complete and valid telephone number for the responsible party of the Owner/Operator (include the extension if applicable).
- Example of format: “416-734-3300 ext. 234”, “905-699-0101”

Contact Email Address

- This must be submitted as a complete and valid email address for the responsible party of the Owner/Operator.
- Example of format: “testemail@tssa.org”, “johnsmith@emailaddress.com”

3. Select the “Bulk Upload” button from the top menu.



The Bulk Upload page is where you can upload either your Record of Inspection or your Cancellation Notifications in Bulk. Links to download both templates are available on this page.

4. Select the File type “Record of Inspection” from the drop-down menu.

5. Select the “Browse” button to add your bulk file for upload. Once your file has been added, select the “Submit” button.



Bulk Upload

[Record of Inspection Template](#) [Cancellation of Insurance Template](#)

File Type

File Type *

Record of Inspection

Attach a File *

C:\Users\jmyrie\Desktop\BPV

If the file was submitted successfully you the system will display a confirmation message and send both the Insurer and the Owner a summary notification.

Bulk Upload Confirmation

Bulk Upload

[Record of Inspection Template](#) [Cancellation of Insurance Template](#)

Submission completed successfully.

4. Select "Record of Inspection" from the "Record of Inspection" top menu to view your submitted records of Inspection.
5. Select the drop arrow and select the "view" option to view each Record of Inspection.



Record of Inspection

Validated ▾ Search

Installation Address ↑	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	ROI Submission Date	Certificate Due Date	Validation Status	Work Order	Work Order In Cart	
65000178	JESSICA TEST OWNER	JESSICA'S TEST INSURER	865704	Pass	5/16/2018 10:42 AM		Valid	20157	Yes	▾ View
65000179	JESSICA TEST OWNER	JESSICA'S TEST INSURER	345678	Pass	5/16/2018 10:42 AM		Valid	20158	Yes	▾
65000183	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000087	Pass	5/17/2018 11:45 AM		Valid	20159	Yes	▾

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

ROI Status	Definition
Pending	Record of Inspection submitted and failed system validation.
Submitted	Record of Inspection submitted and passed system validation
Validated	Record of Inspection submitted and validated by the owner
Paid	Record of Inspection submitted, validated, and the Certificate has been paid for by the owner
Rejected	Record of Inspection submitted, and rejected by the system due to an error
Cancelled	Record of Inspection submitted, then cancelled by the Insurer or TSSA

2.2 Submit Record of Inspection (ROI) – Populate Electronic Form

If you prefer to fill in a form instead of uploading a batch file, there is an option to fill out a Record of Inspection form in the Portal. This allows a user to submit a single Record of Inspection at a time. The electronic form and bulk file have the same fields and the same requirements apply.

1. Select “Record of Inspection” from the “Record of Inspection” top menu to view populate the form.





2. Select the “Create” button to fill in the Record of Inspection form.

3. Fill in the following fields and select the “Submit” Button

- Customer Information
- Inspection Information
- Equipment Information

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

5. Select the drop arrow and select the “view” option to view each Record of Inspection.

Installation Address	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	ROI Submission Date	Certificate Due Date	Validation Status	Work Order	Work Order In Cart	
65000178	JESSICA TEST OWNER	JESSICA'S TEST INSURER	865704	Pass	5/16/2018 10:42 AM		Valid	20157	Yes	View
65000179	JESSICA TEST OWNER	JESSICA'S TEST INSURER	345678	Pass	5/16/2018 10:42 AM		Valid	20158	Yes	View
65000183	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000087	Pass	5/17/2018 11:45 AM		Valid	20159	Yes	View

Record of Inspection Form



Create

×

Customer Information

Owner / Operator Name *

Inspection Information

Insurer Name *

Inspector Name *

Inspection Agency Name

TSSA Issued Inspector Certificate Number (COC) *

Inspection Date *



Inspection Type *

Inspection Status *

NB Code Violation Category Text

Equipment Information

TSSA ID *

Installation Address - Postal Code *

MAWP (psi) *

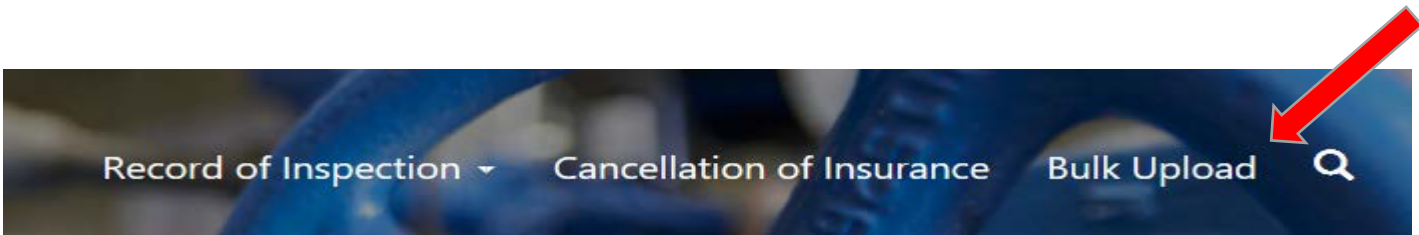
Submit



3.1 Submit Cancellation of Insurance Notification – Bulk Upload

When an Insurer is no longer providing insurance or performing inspections on a qualified boiler or pressure vessel they are required to notify the TSSA. In the portal, you will have the option to perform a Bulk Upload to notify the TSSA of each device impacted by the cancellation of insurance. To perform a cancellation bulk upload, follow the steps below:

1. Select the “Bulk Upload” button from the top menu.



The Bulk Upload page is where you can upload either your Record of Inspection or your Cancellation Notifications in Bulk. Links to download both templates are available on this page.

6. Select the File type “Cancellation of Insurance” from the drop-down menu.
7. Select the “Browse” button to add your bulk file for upload. Once your file has been added, select the “Submit” button.

The screenshot shows the 'Bulk Upload' form. At the top, the title 'Bulk Upload' is displayed. Below the title are two buttons: 'Record of Inspection Template' and 'Cancellation of Insurance Template'. Underneath is a section titled 'File Type' with a 'File Type *' label and a dropdown menu currently set to 'Cancellation of Insurance'. Below that is an 'Attach a File *' section with a text input field containing the file path 'C:\Users\jmyrie\Desktop\BPV' and a 'Browse...' button. At the bottom left of the form is a blue 'Submit' button.



If the file was submitted successfully you the system will display a confirmation message and send both the Insurer and the Owner a summary notification.

Bulk Upload Confirmation

The screenshot shows a web interface for 'Bulk Upload'. At the top, the title 'Bulk Upload' is displayed in a large, dark font. Below the title, there are two buttons: 'Record of Inspection Template' and 'Cancellation of Insurance Template'. A green horizontal bar at the bottom of the interface contains the text 'Submission completed successfully.'

Bulk Upload

Record of Inspection Template Cancellation of Insurance Template

Submission completed successfully.

4. Select "Cancellation of Insurance" button from the top menu to view your submitted cancellation notification.
5. Select the drop arrow and select the "View" option to view each record.

The screenshot shows a table titled 'Cancellation of Insurance'. The table has a header row with columns: Cancellation Number (with an upward arrow), Owner / Operator Name, Effective Date of Cancellation, TSSA ID, Installation Address Postal Code, Status Reason, and Created On. There are three data rows. The first row has a dropdown arrow on the right, which is open, showing a 'View Details' option. Above the table, there is a search bar and a 'Create' button.

Cancellation of Insurance

Submitted Search Create

Cancellation Number ↑	Owner / Operator Name	Effective Date of Cancellation	TSSA ID	Installation Address Postal Code	Status Reason	Created On
65000015	JESSICA TEST OWNER	5/11/2018	65000087	L1R 2H4	Submitted	5/23/2018 12:19 AM
65000017	JESSICA TEST OWNER	5/11/2018	65000088	L1R 2H4	Submitted	5/23/2018 12:19 AM
65000019	Jessica Test Owner	5/1/2018	865704	L1R 2H4	Submitted	5/23/2018 11:29 AM

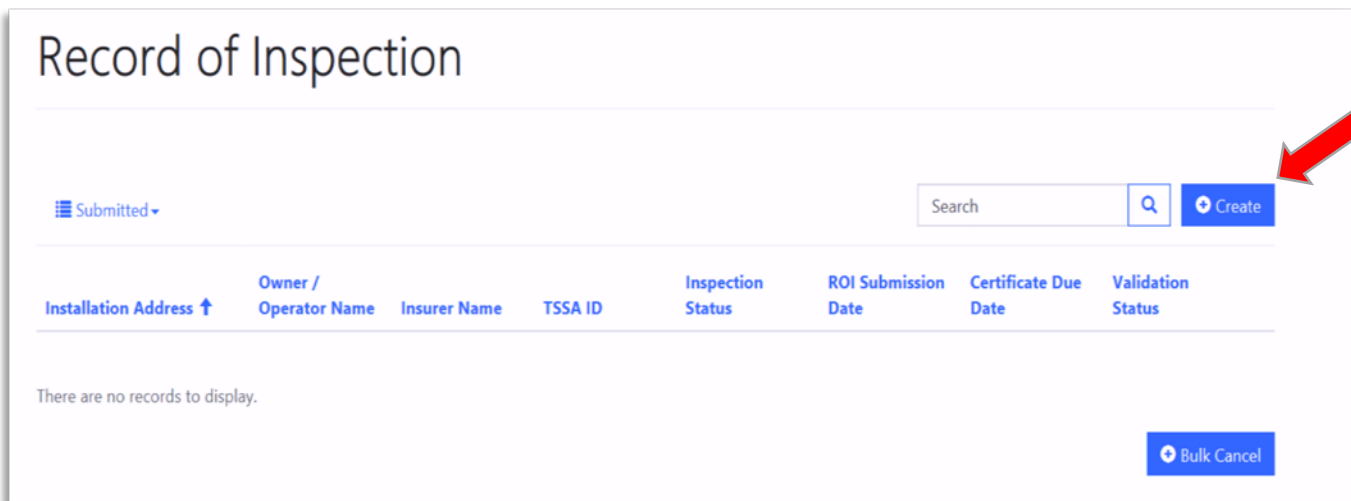
View Details



3.2 Cancellation of Insurance Notification – Populate Electronic Form

If you prefer to fill in a form instead of uploading a batch file, there is an option to fill out a Cancellation Notification form in the Portal. This allows a user to submit a single notification at a time. The electronic form and bulk file have the same fields and the same requirements apply.

1. Select the “Cancellation of Insurance” button from the top menu to populate the form.
2. Select the “Create” button to fill in the Cancellation of Insurance form.



3. Fill in the following fields and select the “Submit” Button
 - Customer Information
 - Equipment Information
4. Select “Cancellation of Insurance” button from the top menu to view your submitted notifications.



Cancellation of Insurance Form

✎ Create
✕

Customer Information

Owner / Operator Name *

Effective Date of Cancellation *

Equipment Information

TSSA ID *

Installation Address Postal Code *

5. Select the drop arrow and select the “view” option to view each Record of Inspection.

Record of Inspection										
Installation Address	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	ROI Submission Date	Certificate Due Date	Validation Status	Work Order	Work Order In Cart	
65000178	JESSICA TEST OWNER	JESSICA'S TEST INSURER	865704	Pass	5/16/2018 10:42 AM		Valid	20157	Yes	View
65000179	JESSICA TEST OWNER	JESSICA'S TEST INSURER	345678	Pass	5/16/2018 10:42 AM		Valid	20158	Yes	View
65000183	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000087	Pass	5/17/2018 11:45 AM		Valid	20159	Yes	View



Appendix

Record of Inspection List of Values

Type of Business	Inspection Type	Inspection Status	Inspection Frequency	NB Violation Category
01 - Power Producers/Utilities	Internal	Pass	1-Year	1.1) Safety Relief Devices Inoperable
02 - Petro/Chemical	External	Conditional Pass	2-Year	1.2) Safety Relief Devices Device Missing - Not Installed
03 - Production Industries			3-Year	1.3) Safety Relief Devices Improper Installation
04 - Manufacturing Industries				1.4) Safety Relief Devices Leaking
05 - Medical				1.5) Safety Relief Devices Incorrect Capacity
06 - Academic				1.6) Safety Relief Devices Missing Nameplate
07 - Food Process				1.7) Safety Relief Devices Incorrect Set Pressure
08 - Public Services				2.1) Low Water Cutoffs / Flow Sensing Devices Inoperable
09 - Commercial				2.2) Low Water Cutoffs / Flow Sensing Devices Device Missing - Not Installed
10 - Residential				2.3) Low Water Cutoffs / Flow Sensing Devices Improper Installation
11 - Agriculture				2.4) Low Water Cutoffs / Flow Sensing Devices No Manual Reset
				2.5) Low Water Cutoffs / Flow Sensing Devices Sediment / Dirty / Leaking
				3.1) Pressure Controls Inoperable
				3.2) Pressure Controls Device Missing - Not Installed
				3.3) Pressure Controls Improper Installation
				3.4) Pressure Controls No Manual Reset
				4.1) Temperature Controls - Operator or High Limit Inoperable
				4.2) Temperature Controls - Operator or High Limit Device Missing - Not Installed
				4.3) Temperature Controls - Operator or High Limit Improper Installation
				4.4) Temperature Controls - Operator or High Limit No Manual Reset
				5.1) Burner Management Flame Failure – Operating, Management System
				5.2) Burner Management Electrical Power Disconnect – Missing / Not Functioning
				5.3) Burner Management Improper Installation
				5.4) Burner Management Fuel Leaks
				5.5) Burner Management Emergency Shut Down Switch– Missing / Not Functioning
				5.6) Burner Management Fuel Train Damaged
				5.7) Burner Management Flame Impingement
				5.8) Burner Management Improper Combustion Air
				6.1) Level Indicators - Gage Glasses, Bulls Eyes and Fiber Opticals Inoperable
				6.2) Level Indicators - Gage Glasses, Bulls Eyes and Fiber Opticals Device Missing - Not Installed
				6.3) Level Indicators - Gage Glasses, Bulls Eyes and Fiber Opticals Improper Installation
				6.4) Level Indicators - Gage Glasses, Bulls Eyes and Fiber Opticals Leaking
				6.5) Level Indicators - Gage Glasses, Bulls Eyes and Fiber Opticals Internal Deposits
				7.1) Pressure / Temperature Indicators Damaged - Inoperable
				7.2) Pressure / Temperature Indicators Device Missing - Not Installed
				7.3) Pressure / Temperature Indicators Improper Installation
				7.4) Pressure / Temperature Indicators Leaking
				7.5) Pressure / Temperature Indicators Improper Size / Range
				8.1) Pressure - Retaining Items (PRI) Misc Inoperable
				8.2) Pressure - Retaining Items (PRI) Misc Item Missing – Not Installed
				8.3) Pressure - Retaining Items (PRI) Misc Improper Installation
				8.4) Pressure - Retaining Items (PRI) Misc Item Leaking
				8.5) Pressure - Retaining Items (PRI) Misc Improper Repair / Alteration
				8.6) Pressure - Retaining Items (PRI) Misc Materials Deficiencies
				8.7) Pressure - Retaining Items (PRI) Misc Required documentation, nameplate-missing or damaged
				8.8) Pressure - Retaining Items (PRI) Misc Non-ASME Code Construction
				8.9) Pressure - Retaining Items (PRI) Misc Inspection Certificate-missing or expired
				8.10) Pressure - Retaining Items (PRI) Misc Testing required



TECHNICAL STANDARDS
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