TSSA PORTAL TRAINING GUIDE
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1.1 Redeem Invitation

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

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

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

2. Select the Register Button to redeem invitation

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

Validate your Profile

5. Review your profile to validate your following contact details to ensure the TSSA has the correct information:
   - Name
   - Phone
   - Email
   - Billing address

6. The system requires that you validate that you confirmed your email address. Select the Confirm Email button in the top right corner. See Screenshot below.

   **The system should have sent a Confirm your Account Email Notification**

7. Select the Complete Registration Link in the email to finish your account validation.

8. The system will display a confirmation message once your email has been confirmed successfully.
Email Validation Button

Email Validation Confirmation
1.2 Reset Password

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

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

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

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

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.
1.3 Manage Profile

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

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

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

3. Override or populate the phone and/or Billing Address fields that need to be updated.

4. Once complete select the “Update” button to save the changes.
2.1 View Your Record(s) of Inspection

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

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

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

<table>
<thead>
<tr>
<th>ROI Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
<td>Record of Inspection submitted and passed system validation</td>
</tr>
<tr>
<td>Validated</td>
<td>Record of Inspection submitted and validated by the owner</td>
</tr>
<tr>
<td>Paid</td>
<td>Record of Inspection submitted, validated, and the Certificate has been paid for by the owner</td>
</tr>
</tbody>
</table>

2. Select Submitted from the menu on the left to view all your submitted Records of Inspection.
3. To view a specific record, select the drop arrow, and select the “view” option to view each Record of Inspection.

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

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

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

Option A: Select a Single Record for Validation

5. Select the drop arrow at the end of the record to be validated. Then select the “Validate” button.
Option B: Select Multiple Records for Validation

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

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

Note: To de-select a record, select the record number, under the “Selected Records” list.
8. Confirm the list of records chosen, then select the “Execute” button to complete the update.

Option C: Select All Records for Validation

9. To update all your records of inspection that are in a “Submitted” status to a “Validated” status, select the “Validate All Submitted” button. Once this button is selected. All applicable records displayed will be updated to “Validated”.
3.1 Add your Record of Inspection to the Shopping Cart for Payment

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

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

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

![Record of Inspection](image-url)
3. Select the “Add to Cart” button from the drop arrow for each certificate you would like to pay for. Each record added to the cart will move forward for payment of the

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

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

- The system will then display all the records in your shopping cart.
5. Confirm your list of records for payment is correct, then select the “Request Certificate(s)” button to proceed to the checkout.
3.1 Payment Checkout

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

- Credit Card
- Invoice

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

Move to one of the following sections for payment instructions:

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

2. Select “Credit Card” as your payment method

How would you like to pay?

Select your payment method

3. Select the “Next” button to proceed.

4. Enter your Credit Card information in the secured payment window, then select the “Process Transaction” button. All transactions are in Canadian Dollars (CAD).

Note: To cancel a transaction select the “Cancel Transaction” button above
5. The system will display a payment record page. Review the transaction details and press the “Complete” button to complete the transaction.

6. The system will then take the user to the Payment History page. On this page, a user can view all their transactions that were paid or cancelled.

7. To view each transaction, select the order number link, or select “View Details” from the drop arrow menu.

8. For each transaction selected, the associated pdf. Invoice will be available to be viewed, saved, or printed.
   a. Select the “Reload Files” button if your pdf invoice is not displayed.
4.1 View Certificate of Inspection (COI)

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

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

2. The system will display all your previously issued certificates.

3. To view an electronic record of your certificate, select the order number link, or select “View Details” from the drop arrow menu.

4. To view the associated pdf. Of your Certificate, select the pdf from the list based on the Authorization number. A user will be able to be view, save, or print their COI.