

# TSSA PORTAL TRAINING GUIDE

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

Insurer Processes



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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

The screenshot shows the TSSA portal's registration interface. At the top, there is a header with the TSSA logo and the text 'TECHNICAL STANDARDS & SAFETY AUTHORITY'. Below the header, there are two tabs: 'Sign In' and 'Redeem Invitation'. The 'Redeem Invitation' tab is active. Underneath, the text 'Sign up with an invitation code' is displayed. A red asterisk is followed by the label 'Invitation Code'. The input field contains a long, complex 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: 'ieEAPUhv2tywyrVjLdxx4-pAZr5yRy-zMFLYMy0x48uLDui9Q4fntmG8lpEziJKSYrXCmqM1XnujbE3v3-hJYkZyC6A9zJZaMMfNnCRS4nFNQnigvIVXISTBKCS4GWjniHzW6r8pCD2EkwOMg0s5mzC9KEy9oTOwCyZvj6CdIfY-'. Below the code box, 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 currently filled with asterisks. 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**

<b>First Name *</b>	<input type="text" value="jessica"/>	<b>Last Name *</b>	<input type="text" value="myrie"/>
<b>E-mail</b>	<input type="text" value="jmyrie@tssa.org"/>	<b>Business Phone</b>	<input type="text"/>
<b>Company Name</b>	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 screenshot shows the top portion of the TSSA login page. It features the TSSA logo and name in the top left corner. In the top right corner, there is a 'Sign In' link. Below the header, there are two buttons: 'Sign In' and 'Redeem Invitation'. The main heading is 'Sign in with a TSSA account'. Below this, there are two input fields: one for 'User name/Business Email' and one for 'Password'. A 'Remember me?' checkbox is located below the password field. At the bottom of the form, there are two buttons: 'Sign In' and 'Forgot Your Password?'. The background of the page is the same industrial machinery image seen in the first image.

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

This screenshot shows the 'Forgot your password?' form. The heading '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, there is a small instruction: 'Enter your email address to request a password reset.' At the bottom of the form, there is a blue 'Send' button.



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

This is a screenshot of an email message. At the top, it says 'Forgot your password?'. Below this, there is a light blue rectangular box containing the text '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.

This is a screenshot of a web form titled 'Reset Password'. It contains two input fields: 'New Password' and 'Confirm New Password', both filled with asterisks. Below the second field is a blue button labeled 'Reset'.

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'. The form contains two input fields: 'User name/Business E mail' with the value 'test@tssa.org' and 'Password' with masked characters. 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

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

### Installation Address – Postal Code Only

- The postal code must be entered as “M9W 6N9”, no other format will be accepted by the system.
- It is important to note that full addresses will not be accepted by the system and will result in automatic rejection.

### MWAP (psi)

- This is a mandatory value and must be entered as a numerical value.

### 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.

#### **Insurer Name**

- The “Insurer Name” must reflect the Legal Name/Entity, short forms, acronyms, etc. will not be accepted by the system.

#### **Inspection Agency**

- The “Inspection Agency” must reflect the Legal Name/Entity, short forms, acronyms, etc. will not be accepted by the system.

#### **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.

#### **TSSA Issues Inspector Certificate Number (COC)**

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

#### **Inspection Date**

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

#### **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. For example: “1.1; 1.5”

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.

A screenshot of the 'Bulk Upload' web 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' containing a dropdown menu labeled 'File Type \*' with 'Record of Inspection' selected. 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 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



## 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



Create

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



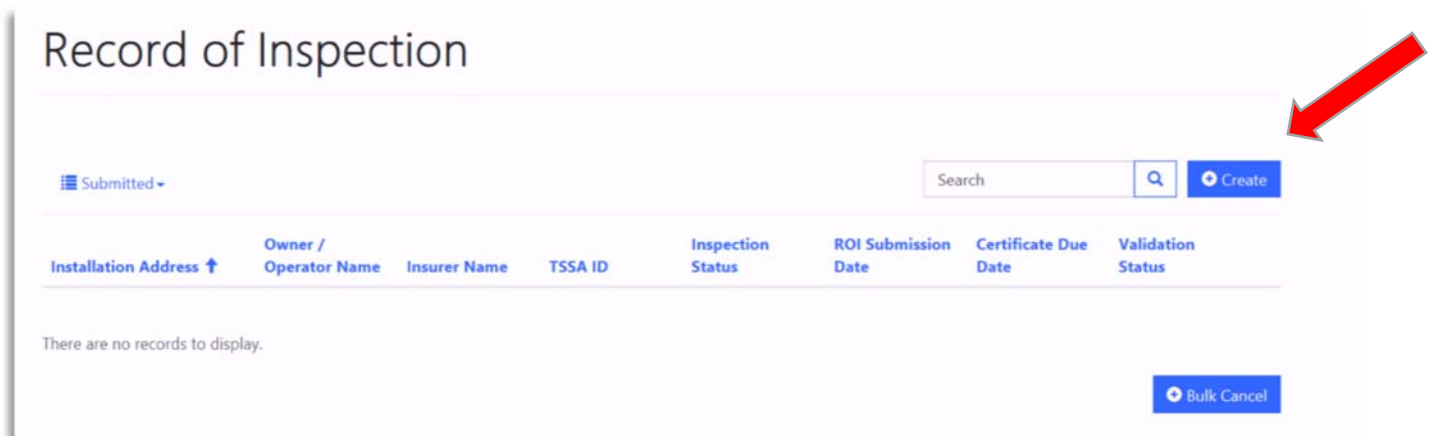
## 2.2 Submit Record of Inspection (ROI) – Populate Electronic Form

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.





### 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	<input type="button" value="View"/>
65000179	JESSICA TEST OWNER	JESSICA'S TEST INSURER	345678	Pass	5/16/2018 10:42 AM		Valid	20158	Yes	<input type="button" value="View"/>
65000183	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000087	Pass	5/17/2018 11:45 AM		Valid	20159	Yes	<input type="button" value="View"/>

### Record of Inspection Form

X

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#### 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) \*

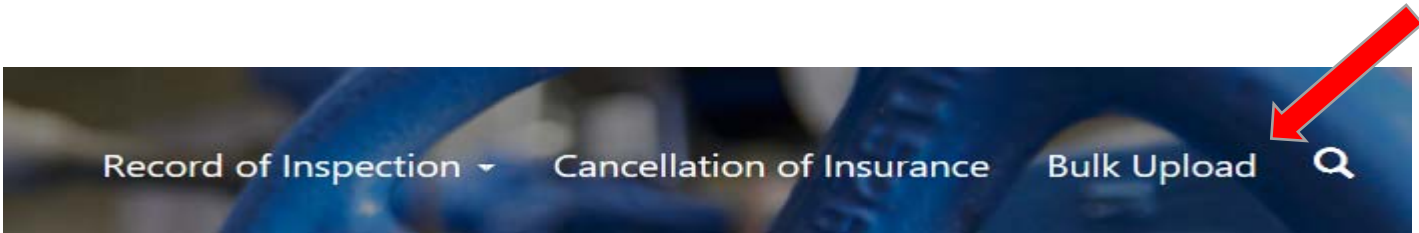
Submit



### 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.**

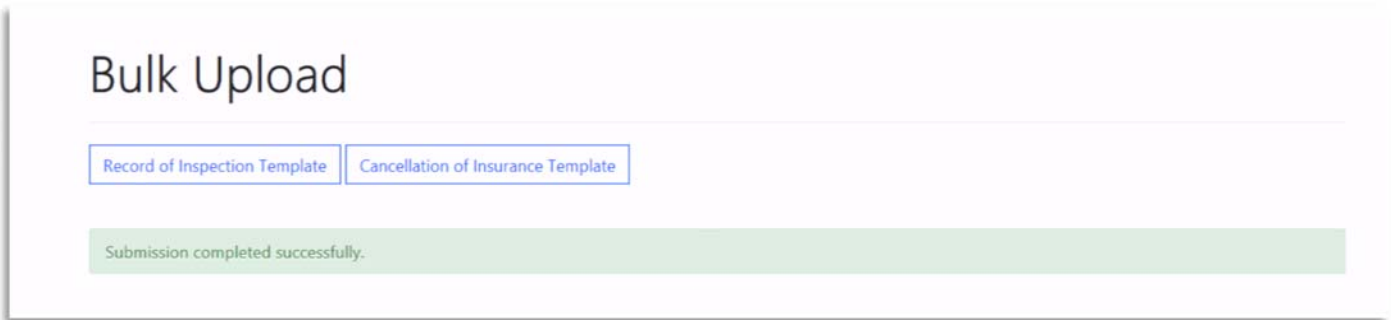
6. Select the File type “Cancellation of Insurance” from the drop-down menu.
7. Select the “Browse” button to add your bulk file for upload. Once your file has been added, select the “Submit” button.

The screenshot displays the 'Bulk Upload' form. At the top, the title 'Bulk Upload' is centered. Below the title are two buttons: 'Record of Inspection Template' and 'Cancellation of Insurance Template'. Underneath these is a section titled 'File Type' with a label 'File Type \*' 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



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.

### Cancellation of Insurance

Submitted

Search

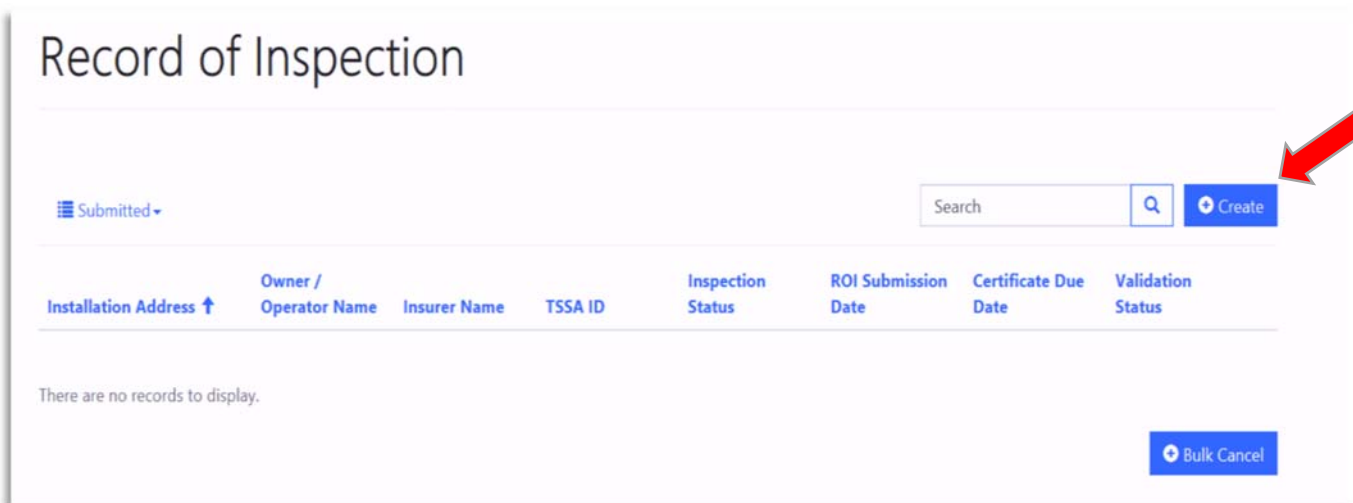
Cancellation Number ↑	Owner / Operator Name	Effective Date of Cancellation	TSSA ID	Installation Address Postal Code	Status Reason	Created On	
65000015	JESSICA TEST OWNER	5/11/2018	65000087	L1R 2H4	Submitted	5/23/2018 12:19 AM	⌵ View Details
65000017	JESSICA TEST OWNER	5/11/2018	65000088	L1R 2H4	Submitted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



### 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
✕

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### 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										
<span>Validated</span> <span style="float: right;">Search <input type="text"/></span> <span style="float: right;"><a href="#">Create</a></span>										
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