



CRM  
Version 0.1



# Technical Standards and Safety Authority

*Insurer Portal Training Documentation*





# Insurer Portal Training Document

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## Overview

This training document will help users navigate through the Insurer Portal App, and complete functionalities such as: Uploading ROI's, Failed Inspections form and cancellation of Insurer.

### Prerequisites:

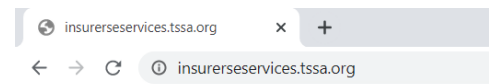
- User has redeemed their code and completed their portal registrations form.

## Step-by-step Instructions

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

### Signing into Portal

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



2. Click on Sign In button



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



CRM  
Version 0.1



### 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

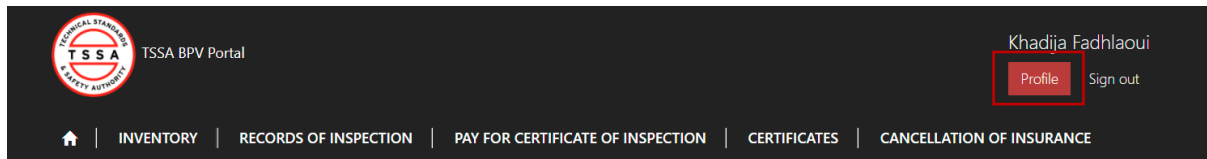
☐ Remember me?

[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.*

Home > Profile

Please provide some information about yourself.

The **First Name** and **Last Name** you provide will be displayed alongside any comments, forum posts, or ideas you make on the site.

The **Email Address** and **Phone** number will not be displayed on the site.

Your **Organization** and **Title** are optional. They will be displayed with your comments and forum posts.

Your information

|                                      |  |
|--------------------------------------|--|
| <b>First Name *</b>                  | <b>Last Name *</b>                               |
| <input type="text" value="Khadija"/> | <input type="text" value="Fadhlouli"/>           |
| <b>Primary Phone Number *</b>        | <b>E-mail *</b>                                  |
| <input type="text"/>                 | <input type="text" value="kfadhlouli@tssa.org"/> |

|                                      |                                    |
|--------------------------------------|------------------------------------|
| <b>Account Number (Connected To)</b> | <b>Account Name (Connected To)</b> |
| <input type="text" value="180226"/>  | <input type="text" value="TSSA"/>  |

|   |                          |
|---|--------------------------|
| <b>Address 1</b>  | <b>Organization Name</b> |
| <input type="text" value="345 CARLINGVIEW DR&lt;br/&gt;TORONTO ON M9W 6N9&lt;br/&gt;Canada"/> | <input type="text"/>     |




## 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 Portal


Amitesh Solanki  
[Profile](#) [Sign out](#)


[Home](#) | [INVENTORY](#) | [RECORDS OF INSPECTION](#) | [UPLOAD ROI](#) | [FAILED INSPECTIONS](#) | [CANCELLATION OF INSURANCE](#)


Welcome ROYAL & SUN ALLIANCE INSURANCE COMPANY OF CANADA


1000 SHEPPARD AVENUE EAST - SUITE 800  
TORONTO, ONTARIO M2N 6L8  
Canada


Email: [KPolgar@Bentall.com](mailto:KPolgar@Bentall.com)  
Phone: 1-(416) 360-0540 x221

  
[Inventory](#)

  
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[Cancellation of Insurance](#)

  
[Failed Inspections](#)

  
[Upload ROI](#)

[BPV Portal FAQs](#)

[TSSA BPV legislation](#)

[Training Videos](#)


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Phone: 1-877-682-8772 Email: [customerservices@tssa.org](mailto:customerservices@tssa.org)

[Helpful Links](#)  
[Knowledge Articles](#) [TSSA Website](#)



## Inventory Page

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

 TSSA BPV Portal

Armitesh Solanki  
[Profile](#) [Sign out](#)

[Home](#) | **[INVENTORY](#)** | [RECORDS OF INSPECTION](#) | [UPLOAD ROI](#) | [FAILED INSPECTIONS](#) | [CANCELLATION OF INSURANCE](#)

Home > Inventory


[Download](#)

| 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         |
| 175564             |                |                         | 872 TASHMOO AVE, SARNIA, ON, N7T 7M1, Canada | Pressure Vessel | Active (Insured)   | SAN6157    | Alteration CRN# SAN6157, Original CRN# E4638.5              | 5.353312 |                       | E751          |
| 175564             |                |                         | 872 TASHMOO AVE, SARNIA, ON, N7T 7M1, Canada | Pressure Vessel | Active (Insured)   | SAN6155    | ITEM TT117 - Alteration CRN# SAN6155, Original CRN# E4966.5 | 5.353316 |                       | E752          |

## 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.*

 TSSA BPV Portal

Armitesh Solanki  
[Profile](#) [Sign out](#)

[Home](#) | **[INVENTORY](#)** | [RECORDS OF INSPECTION](#) | [UPLOAD ROI](#) | [FAILED INSPECTIONS](#) | [CANCELLATION OF INSURANCE](#)

Home > Inventory

[Download](#)

| Inventory Number ↑ | Owner/Operator | Account Site            | Site         | Asset Class | Status | CRN Number | Equipment Tag | OIN      | National Board Number | Serial Number |
|--------------------|----------------|-------------------------|--------------|-------------|--------|------------|---------------|----------|-----------------------|---------------|
| 17459              | GUELPH         | CENTRAL UTILITIES PLANT | 65 LANG WAY, | Boiler      | Active | D173.5     | 4             | 5.109705 |                       | 62820         |

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Phone: 1-877-682-8772 Email: [customerservices@tssa.org](mailto:customerservices@tssa.org)

[Helpful Links](#)  
[Knowledge Articles](#) [TSSA Website](#)



## 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.

The screenshot shows the TSSA BPV Portal interface. The user is logged in as Amitesh Solanki. The navigation bar includes Home, INVENTORY (highlighted), RECORDS OF INSPECTION, UPLOAD ROI, FAILED INSPECTIONS, and CANCELLATION OF INSURANCE. Below the navigation bar, 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

10. 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 Amitesh Solanki. The navigation bar includes Home, INVENTORY (highlighted), RECORDS OF INSPECTION, UPLOAD ROI, FAILED INSPECTIONS, and CANCELLATION OF INSURANCE. Below the navigation bar, there is a search bar and a Download button. The main content area displays a table of inventory items. The first item, with Inventory Number 174598, is highlighted with a red box.

| 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         |
| 175564             |                |                         | 872 TASHMOO AVE, SARNIA, ON, N7T 7M1, Canada | Pressure Vessel | Active (Insured)   | SAN6157    | Alteration CRN# SAN6157 , Original CRN# E4638.5              | 5.353312 |                       | E751          |
| 175564             |                |                         | 872 TASHMOO AVE, SARNIA, ON, N7T 7M1, Canada | Pressure Vessel | Active (Insured)   | SAN6155    | ITEM TT117 - Alteration CRN# SAN6155 , Original CRN# E4966.5 | 5.353316 |                       | E752          |





11. Review details of Inventory.


View details

### Summary

|                                |                            |
|--------------------------------|----------------------------|
| <b>GENERAL</b>                 | <b>Serial Number</b>       |
| <b>TSSA ID</b>                 | 62820                      |
| 174598                         | <b>Manufacturer's Name</b> |
| <b>Owner/ Operator *</b>       | BWXT CANADA LTD            |
| GUELPH                         | <b>Shell MAWP</b>          |
| —                              | <b>Year Built</b>          |
| <b>CRN Number</b>              | 1967                       |
| D173.5                         |                            |
| <b>Installation Address</b>    |                            |
| 65 LANG WAY,                   |                            |
| <b>Equipment Tag Number</b>    |                            |
| 4                              |                            |
| <b>Device Type *</b>           |                            |
| Boiler                         |                            |
| <b>Inspection Cycle Months</b> |                            |
| 12 Months                      |                            |

## Records of Inspection Page

12. To view records inspections previously 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

Search

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



## 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.*

The screenshot shows the TSSA BPV Portal interface. At the top, there's a navigation bar with links: Home, INVENTORY, RECORDS OF INSPECTION, UPLOAD ROI, FAILED INSPECTIONS, and CANCELLATION OF INSURANCE. The user is logged in as Amitesh Solanki. Below the navigation bar, there's a breadcrumb trail: Home > Records of Inspection. A search bar on the right contains the text "5307\*" and a search icon. Below the search bar, a table displays the search results. The table has columns: ROI Number, Inventory Number, Equipment Type, Account Name (Owner/Operator), Site Address, Rol Status, and ROI Submission Date. The first row shows ROI Number 53076, Inventory Number 646672, and Site Address 84 SMELTER RD, CONISTON, ON, P0M 1M0, Canada. The Rol Status is "Submitted by Insurer" and the ROI Submission Date is "2/24/2021 1:54 PM".

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

## 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.

The screenshot shows the TSSA BPV Portal interface. At the top, there's a navigation bar with links: Home, INVENTORY, RECORDS OF INSPECTION, UPLOAD ROI, FAILED INSPECTIONS, and CANCELLATION OF INSURANCE. The user is logged in as Amitesh Solanki. Below the navigation bar, there's a breadcrumb trail: Home > Records of Inspection. A dropdown menu is open next to the "ROI(s) - Submitted by Insurer" filter. The dropdown menu lists the following options: ROI(s) - Submitted by Insurer, ROI(s) - Validated, ROI(s) - Rejected, ROI(s) - Pending Payments, and ROI(s) - Paid. Below the dropdown menu, a table displays the search results. The table has columns: ROI Number, Inventory Number, Equipment Type, Account Name (Owner/Operator), Site Address, Rol Status, and ROI Submission Date. The first row shows ROI Number 53076, Inventory Number 646672, and Site Address 84 SMELTER RD, CONISTON, ON, P0M 1M0, Canada. The Rol Status is "Submitted by Insurer" and the ROI Submission Date is "2/24/2021 1:54 PM".


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



## Upload Records of Inspections

The Upload ROI page is where you can upload either your bulk or complete a single form records of ROI's.

△ Bulk upload template can be downloaded when user clicks on "here" icon located at the bottom of the Upload xls button.

 TSSA BPV Portal

Sevres Snape  
[Profile](#) [Sign out](#)

[Home](#) | [INVENTORY](#) | [RECORDS OF INSPECTION](#) | [UPLOAD ROI](#) | [FAILED INSPECTIONS](#) | [CANCELLATION OF INSURANCE](#)

Home > Upload ROI > Index

### Bulk upload multiple ROIs (Excel File)

Upload ROIs from Microsoft Excel file(.xls or .xlsx only).

Upload xls

Click [here](#) to download Records of Inspection excel Template

### Single ROI

Add(Create) a Single ROI.

ADD ROI



## Bulk upload Records of Inspections

15. Click on **Upload xls** button on the Upload ROI page

Bulk upload multiple ROIs (Excel File)

Upload ROIs from Microsoft Excel file(.xls or .xlsx only).

Upload xls

16. Select **Choose File** button

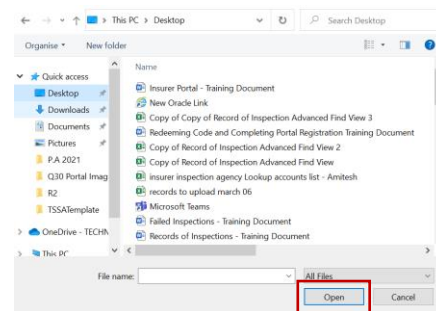
Bulk upload multiple ROIs (Excel File)

Upload ROIs from Microsoft Excel file(.xls or .xlsx only).

Choose File No file chosen

Upload xls

17. Find & Select file to upload. Click on Open button displayed in the dialog box.  
> System will direct users to the ROI Validation page (image below)



### Excel File Details

| File Name  | Created On          | Created By   |  |
|--|---------------------|--------------|--|
| Bulk ROI Upload_Demo to Insurers_March 4 2021.xlsx | 3/4/2021 4:43:15 PM | Sevres Snape | <a href="#">Details</a>   <a href="#">Delete</a> |

Insurers are expected to review all unvalidated ROIs and work with TSSA to resolve the error messages. Please email [bpv\\_inquiries@tssa.org](mailto:bpv_inquiries@tssa.org) for assistance.

### Unvalidated Records

| TSSAID   | Owner/Operator               | Failure Reason  | Action  |
|----------|------------------------------|---|---|
| 17475793 | HOGWARTS O/A SCHOOL OF MAGIC | Insurer Does NOT Exist   Not a Valid Inspector                          | <a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a> |
| 17475793 | HOGWARTS O/A SCHOOL OF MAGIC | Serial Number Mismatch   Insurer Does NOT Exist   Not a Valid Inspector | <a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a> |

### Validated Records

| TSSAID | Owner/Operator | Action |
|--------|----------------|--------|
|--------|----------------|--------|



## Editing & Resubmitting Unvalidated Records

18. ROI's that fail validation will be displayed under unvalidated records section. Reason for failure is displayed adjacent to the record.

*Insurers are expected to review all unvalidated ROIs and work with TSSA to resolve the error messages. Please email [bpv\\_inquiries@tssa.org](mailto:bpv_inquiries@tssa.org) for assistance.*

### Unvalidated Records

| TSSAID   | Owner/Operator               | Failure Reason  | Action  |
|----------|------------------------------|---|---|
| 17475793 | HOGWARTS O/A SCHOOL OF MAGIC | Insurer Does NOT Exist   Not a Valid Inspector                          | <a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a> |
| 17475793 | HOGWARTS O/A SCHOOL OF MAGIC | Serial Number Mismatch   Insurer Does NOT Exist   Not a Valid Inspector | <a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a> |

19. Click on Edit button to modify the record

*Insurers are expected to review all unvalidated ROIs and work with TSSA to resolve the error messages. Please email [bpv\\_inquiries@tssa.org](mailto:bpv_inquiries@tssa.org) for assistance.*

### Unvalidated Records

| TSSAID   | Owner/Operator               | Failure Reason  | Action  |
|----------|------------------------------|---|---|
| 17475793 | HOGWARTS O/A SCHOOL OF MAGIC | Insurer Does NOT Exist   Not a Valid Inspector                          | <a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a> |
| 17475793 | HOGWARTS O/A SCHOOL OF MAGIC | Serial Number Mismatch   Insurer Does NOT Exist   Not a Valid Inspector | <a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a> |



20. Modify fields on the form that require corrections. Click on Re-submit button.

Home > Upload ROI > Index

EDIT

Insurer Does NOT Exist | Not a Valid Inspector |

### Customer Information

|                              |                      |
|------------------------------|----------------------|
| Owner/Operator Name*         | Contact Phone Number |
| HOGWARTS CIA SCHOOL OF MAGIC | 416-734-3453         |
| Contact Name*                | MICHELLE WILLIAMSON  |
| Contact Email Address        | MWILLIAMSON@TSSA.ORG |

### Inspection Information

|                        |  |
|------------------------|--|
| Insurer Name*          | Inspector Name*                                  |
| HOGSMEADIE INSURANCE   |  |
| Inspection Agency Name | TSSA Issued Inspector Certificate Number (COC) * |
| GTT ONSET              |  |
| Inspection Date*       | Inspection Type                                  |
| 2021-03-01             | External   |
| Inspection Status*     | NB Code Violation Category Text                  |
| Pass                   |  |

### Inventory Information

|                              |                                    |
|------------------------------|------------------------------------|
| TSSA ID*                     | CRN#                               |
| 17475793                     | D6858.5                            |
| Serial Number                | Installed Address                  |
| 10020                        | 8 ALFRED ST, COLBORNE, ON, K0K 1S0 |
| NB                           | Year Built                         |
|                              |                                    |
| OIN                          | MAWP (psi)                         |
| 5.167545                     | 150.00                             |
| Maximum Inspection Frequency | Manufacturer Name                  |
|                              |                                    |
| Equipment Tag Number         | Device Type                        |
| CH-82                        |                                    |
| <b>Re-Submit</b>             |                                    |

[Back to List](#)



21. System will re-process the record and validate the information modified. When record passes validation it will be displayed under the Validated Records section. Click on Submit to TSSA button.

- > System will send the information to TSSA data base and create an ROI record.

#### Excel File Details

| File Name  | Created On          | Created By   |  |
|--|---------------------|--------------|--|
| Bulk ROI Upload_Demo to Insurers_March 4 2021.xlsx | 3/4/2021 4:43:15 PM | Sevres Snape | <a href="#">Details</a>   <a href="#">Delete</a> |

Insurers are expected to review all unvalidated ROIs and work with TSSA to resolve the error messages. Please email [bpv\\_inquiries@tssa.org](mailto:bpv_inquiries@tssa.org) for assistance.

#### Unvalidated Records

| TSSAID   | Owner/Operator               | Failure Reason  | Action  |
|----------|------------------------------|---|---|
| 17475793 | HOGWARTS O/A SCHOOL OF MAGIC | Serial Number Mismatch   Insurer Does NOT Exist   Not a Valid Inspector | <a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a> |

#### Validated Records

| TSSAID   | Owner/Operator               | Action  |
|----------|------------------------------|---|
| 17475793 | HOGWARTS O/A SCHOOL OF MAGIC | <a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a> |

I have reviewed the ROIs submitted and attest to their completeness and accuracy.

[Submit To TSSA](#)

## Single Form ROI

22. Click on Add ROI

### Single ROI

Add(Create) a Single ROI.

[ADD ROI](#)

23. Complete Fields on Form. Mandatory fields are marked in red astrix symbol (\*).

- △ System will autopopulate Inventory technical information also the owner/operator name of the device.
- △ System will auto populate COC number value when inspector name is selected & vise versa.



## ROI Submission

### Inventory Information

|                              |                   |
|------------------------------|-------------------|
| TSSA ID*                     | CRN#              |
| Serial Number                | Installed Address |
| NB                           | Year Built        |
| OIN                          | MAWP (psi)        |
| Maximum Inspection Frequency | Manufacturer Name |
| Equipment Tag Number         | Device Type       |

### Customer Information

One of Contact Phone Number or Contact Email Address Should be populated!

|                      |                       |
|----------------------|-----------------------|
| Owner/Operator Name* | Contact Name*         |
| Contact Phone Number | Contact Email Address |

### Inspection Information

|                        |  |
|------------------------|--|
| Insurer Name*          | Inspector Name*                                  |
| Inspection Agency Name | TSSA Issued Inspector Certificate Number (COC) * |
| Inspection Date*       | Inspection Type                                  |
| yyyy-mm-dd             | Internal   |
| Inspection Status*     | NB Code Violation Category Text                  |
| Pass                   |  |

Create

24. Click on Create button located at the bottom of form to process.
- > Information provided on form will be pushed through validation process. User will be directed to the Unvalidated Triage page.



[Back to List](#)

25. Information that passes validation will be displayed under Validated Records section. If the record Failed, it will be displayed under the Unvalidated Records section. User will have the ability to edit and resubmit the form for processing.

Click on **Submit to TSSA** button for records displayed under Validated Records section.

△ See section "Editing & Resubmitting Records of Inspection" for detailed steps.





26.

#### Excel File Details

| File Name  | Created On          | Created By   |  |
|--|---------------------|--------------|--|
| Bulk ROI Upload_Demo to Insurers_March 4 2021.xlsx | 3/4/2021 4:43:15 PM | Sevres Snape | <a href="#">Details</a>   <a href="#">Delete</a> |

*Insurers are expected to review all unvalidated ROIs and work with TSSA to resolve the error messages. Please email [bpv\\_inquiries@tssa.org](mailto:bpv_inquiries@tssa.org) for assistance.*

#### Unvalidated Records

| TSSAID   | Owner/Operator               | Failure Reason  | Action  |
|----------|------------------------------|---|---|
| 17475793 | HOGWARTS O/A SCHOOL OF MAGIC | Serial Number Mismatch   Insurer Does NOT Exist   Not a Valid Inspector | <a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a> |

#### Validated Records


| TSSAID   | Owner/Operator               | Action  |
|----------|------------------------------|---|
| 17475793 | HOGWARTS O/A SCHOOL OF MAGIC | <a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a> |

*I have reviewed the ROIs submitted and attest to their completeness and accuracy.*

[Submit To TSSA](#)

## Failed Inspections Page

27. Click on Failed inspection Tab
- > System will open the Failed Inspection page
  - > System will display any previously submitted Failed Inspections forms in the table on this page

TSSA BPV PortalSevres Snape

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Home > FAILED INSPECTIONS

[Failed Inspections - Submitted](#)

[Q](#) [Create Failed Inspection](#)

| ROI Number | Inventory Number | Equipment Type | Account Name (Owner/Operator) | Site Address | ROI Status <a href="#">↑</a> | ROI Submission Date |
|------------|------------------|----------------|-------------------------------|--------------|------------------------------|---------------------|
|------------|------------------|----------------|-------------------------------|--------------|------------------------------|---------------------|

## Submitting a Failed Inspection Form

28. Click on "Create Failed Inspection" button located on the far right side of the page
- > System will open failed Inspection form



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

Home > FAILED INSPECTIONS

Failed Inspections - Submitted

Search

ROI Number Inventory Number Equipment Type Account Name (Owner/Operator) Site Address ROI Status ROI Submission Date

29. Click on the magnifying glass icon next to the field name "Inventory number"

ROI Detail

Inventory Number \*

30. Using the Search bar, insert the inventory number. This will help narrow down the search in the data base. Once record is found a check mark icon will be displayed on the left side, this means the system has selected the record. Click on the Select button located at the bottom of the window.

Lookup records

Search

| Inventory Number                            | Status Reason Code | Account                      | Site                                       | Program                      | Asset Class | Asset Type |
|---|--------------------|------------------------------|--|------------------------------|-------------|------------|
| <input checked="" type="checkbox"/> 1386590 | Active (Insured)   | Hogwarts O/A School of Magic | 6 ADAMS ST, PARIS, ON, N3L 3Y4, Canada     | Boilers and Pressure Vessels | Boiler      |            |
| <input type="checkbox"/> 17463462           | Active (Insured)   | Hogwarts O/A School of Magic | 8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada | Boilers and Pressure Vessels | Boiler      |            |

< 1 2 >

31. System displays inventory record selected and auto populated the following fields on the form:

✓

ROI Detail

Inventory Number \* 1386590

Asset Class \* Boiler

CRN Number H7268.5

Customer Information

Owner/Operator Hogwarts O/A School of Magic

Insurer \* Hogmeade Insurance A Div Of All-wizarding Insurance

32. Complete the remaing fields on the form  
Click on Submit button upon completion



**Insurer \***

Hogsmeade Insurance A Div Of All-wizarding Insurance ✕ 🔍

**Inspector Name**

**Inspection Date \***

**Inspection Type \***

**Contact Name**

**Contact Email Address**

**Contact Phone Number**

**Description for Failure & History of Equipment**

**Submit**

33. System will return to Failed Inspection page and display the submitted record on screen.

Home > FAILED INSPECTIONS

Failed Inspections - Submitted

Search



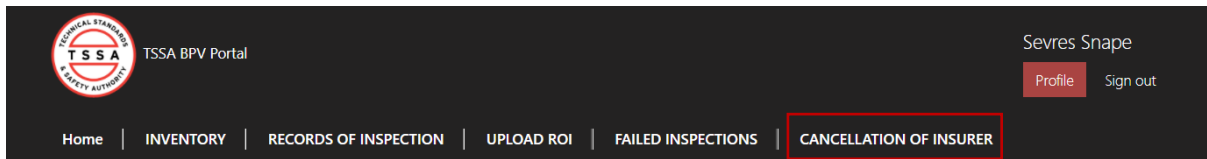
Create Failed Inspection

| ROI Number | Inventory Number | Equipment Type | Account Name (Owner/Operator) | Site Address                                     | ROI Status              | ROI Submission Date  |
|------------|------------------|----------------|-------------------------------|--|-------------------------|----------------------|
| ROI-1061   | 17475793         |                | Hogwarts O/A School of Magic  | 8 ALFRED ST,<br>COLBORNE, ON,<br>K0K 1S0, Canada | Submitted by<br>Insurer | 3/4/2021 12:03<br>PM |



## Cancellation of Insurer Page

34. Click on Cancellation of Insurer Tab located on the top menu bar.



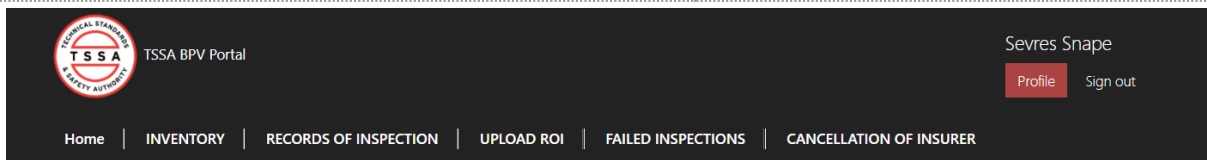
Home > Cancellation of Insurer

Change of insurance - Submitted

Search

| Cancellation/Update<br># ↑ | Inventory | Effective Date of<br>Cancellation | Owner/Operator<br>Name | Previous Insurer Name | New Insurer Name | Created On |
|----------------------------|-----------|-----------------------------------|------------------------|-----------------------|------------------|------------|
|----------------------------|-----------|-----------------------------------|------------------------|-----------------------|------------------|------------|

35. Select on Create button located on the far left side  
> System will trigger the Cancellation form



Home > Cancellation of Insurer

Change of insurance - Submitted

Search

36. 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

Equipment Information  
Inventory



37. 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

Lookup records ×

|                          |           |                     |                                       |   |                                       |
|--------------------------|-----------|---------------------|---------------------------------------|---|---------------------------------------|
|                          | (Insured) | O/A                 | PARIS, ON,                            | and   |                                       |
|                          |           | School of           | N3L 3X4,                              | Pressure  |                                       |
|                          |           | Magic               | Canada                                | Vessels   |                                       |
| <input type="checkbox"/> | 17463462  | Active<br>(Insured) | Hogwarts<br>O/A<br>School of<br>Magic | 8 ALFRED ST,<br>COLBORNE,<br>ON, K0K 1S0,<br>Canada | Boilers<br>and<br>Pressure<br>Vessels |
| <input type="checkbox"/> | 17464838  | Active<br>(Insured) | Hogwarts<br>O/A<br>School of<br>Magic | 8 ALFRED ST,<br>COLBORNE,<br>ON, K0K 1S0,<br>Canada | Boilers<br>and<br>Pressure<br>Vessel  |
| <input type="checkbox"/> | 17466536  | Active<br>(Insured) | Hogwarts<br>O/A                       | 8 ALFRED ST,<br>COLBORNE,                           | Boilers<br>and<br>Pressure<br>Vessel  |

< 1 2 >

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

Equipment Information

Inventory \*

17464838

Site

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

Customer Information

Owner/Operator Name \*

Hogwarts O/A School of Magic

Effective Date of Cancellation \*



39. Complete the Effective Date of Cancellation Field.

Effective Date of Cancellation \*  
3/3/2021

40. Click on Submit button located at the bottom of the form

### Equipment Information

Inventory \*

17464838

Site

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

### Customer Information

Owner/Operator Name \*


Hogwarts O/A School of Magic

Effective Date of Cancellation \*

3/3/2021

Submit

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

 TSSA BPV Portal

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Profile Sign out

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

Home > Cancellation of Insurer

Change of insurance - Submitted

Search Create

| Cancellation/Update # | Inventory | Effective Date of Cancellation | Owner/Operator Name          | Previous Insurer Name                                | New Insurer Name | Created On        |
|-----------------------|-----------|--------------------------------|------------------------------|--|------------------|-------------------|
| CAN-1008              | 17475793  | 3/31/2021                      | Hogwarts O/A School of Magic | Hogsmeade Insurance A Div Of All-wizarding Insurance |                  | 3/4/2021 11:52 AM |
| CAN-1009              | 17464838  | 3/3/2021                       | Hogwarts O/A School of Magic | Hogsmeade Insurance A Div Of All-wizarding Insurance |                  | 3/9/2021 7:20 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. |

| ROI Error Message  | Definition   |
|--|--|
| TSSA UID Length is less then 8 digits  | The inventory number noted on ROI is less then the mandatory length of 8 digits or greater.  |
| TSSA UID is not found in database  | The inventory number noted on ROI does nt exist in our database.   |
| TSSA UID is Exempt   | The inventory number noted on ROI is exempt as per regulations.  |
| CRN Format is not Valid. Please edit or contact TSSA BPV Technical Services to Confirm CRN registration" | The CRN number noted on the ROI' contains " FITG or 0H" these are exempt. Please contact BPV technical services to confirm the CRN registered for that device. |
| Owner/Operator Name does not Match existing records.   | The Owner/Operator name noted on the ROI does not match the information in TSSA data base.   |
| Contact Name Incorrect Format  | Contact Name noted on ROI contains a numeric or character ex. \$%&   |
| Contact Phone Number Incorrect Format  | Contact Phone number noted on ROI contains a non numeric value ex. \$%&  |
| Contact Email Address Incorrect Format   | Contact Email address noted on ROI has no domain   |



CRM  
Version 0.1



|                     |  |
|---------------------|--|
| Duplicate Detection | Another ROI with the inspection date and inspection type has already been submitted. |
|---------------------|--|

## 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](mailto: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](mailto: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](mailto:bpvcustomerservice@tssa.org)