

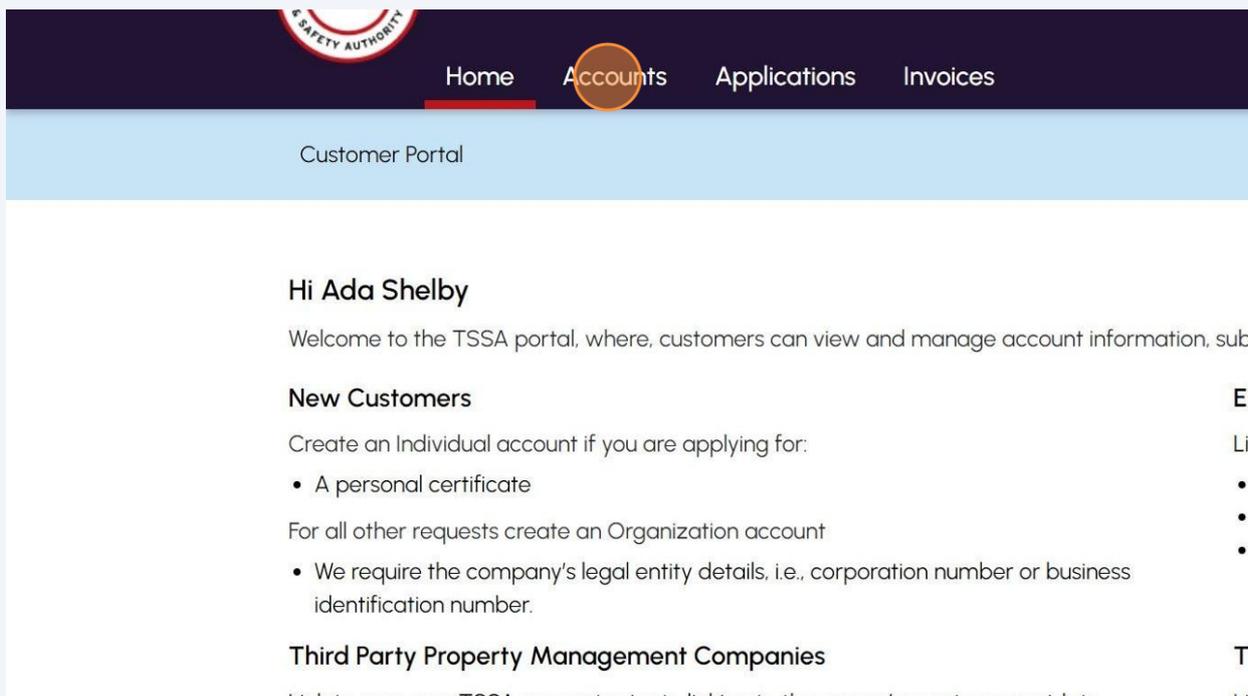
How to Create an Organization Account



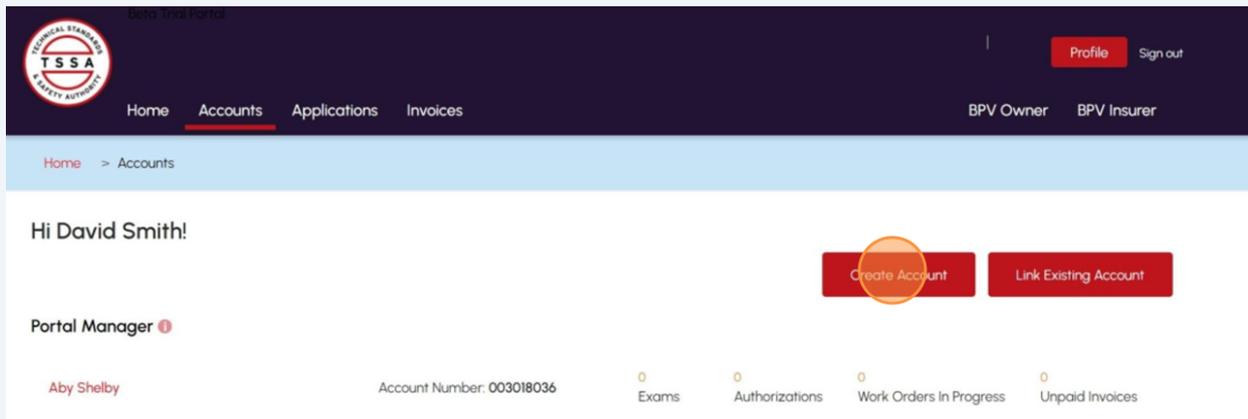
This guide will provide you with step-by-step instructions on how to create an "Organization Account" in the TSSA Client Portal

Important. If you are acting on behalf of an organization or as a Third-Party representative, a property management company or submitter account must be created.

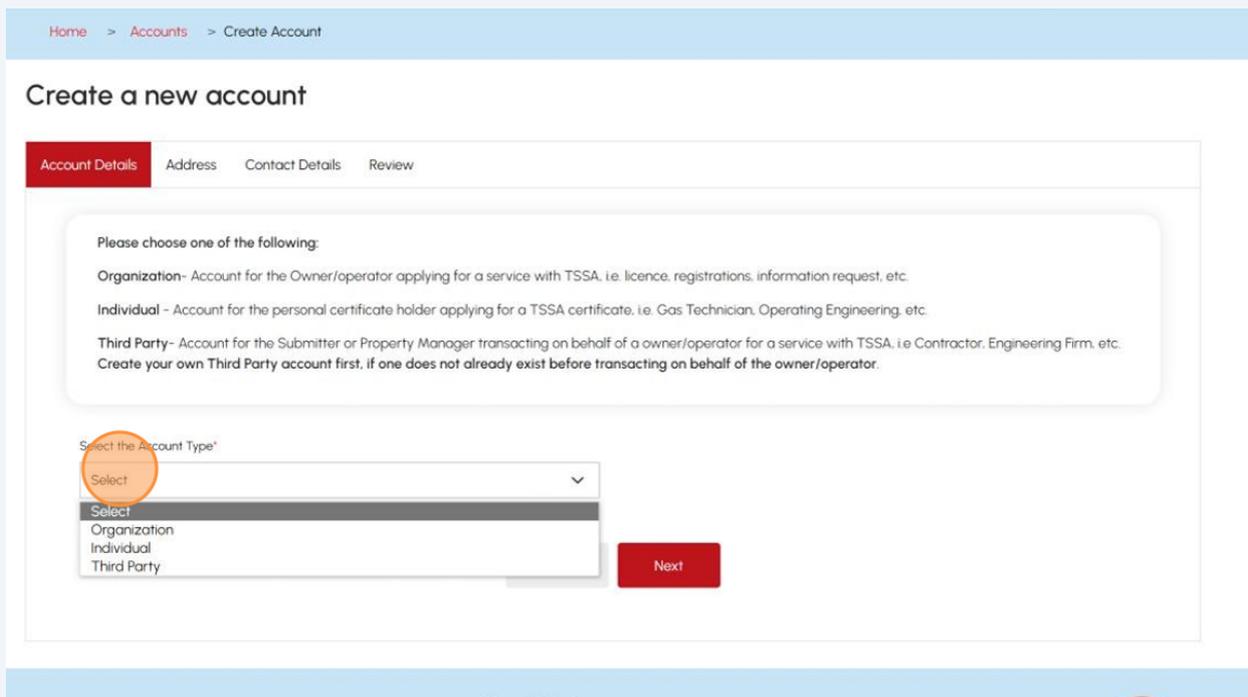
1 From the Client Portal homepage, click the "**Accounts**" tab.



2 Click the "Create Account" button.



3 Click "Account Type" field and select the "Organization" from the drop-down list.



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Answer, "Are you acting on behalf of the organization as a Third-Party representative?" Select "Yes" or "No".

choose one of the following:

Organization- Account for the Owner/operator applying for a service with TSSA, i.e. licence, registrations, information request, etc.

Individual - Account for the personal certificate holder applying for a TSSA certificate, i.e. Gas Technician, Operating Engineering, etc.

Third Party- Account for the Submitter or Property Manager transacting on behalf of a owner/operator for a service with TSSA, i.e Contractor, Engineering Firm, etc. **your own Third Party account first, if one does not already exist before transacting on behalf of the owner/operator.**

Account Type*

Organization

Organization Name* (The full legal name of a business/ organization as per the business registry or first name for a Sole Proprietor)

Organization Name

Account Type*

Individual

Business Identification Number (The number issued by the Province of Ontario for Master Licensee or small business.)

Business Identification Number

Are you acting on behalf of the organization as a Third Party representative?*

Select

- Select
- Yes
- No

Select

Other Name (The full legal other name of the business/organization as per the business registry)

Other Name

Business Identification Number Expiry Date

MM/DD/YYYY

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If you selected **"Yes"** that you are acting on behalf of an organization as a Third-Party representative, an additional field will appear, **"Are you acting as the"**. Select from the drop-down menu, **"Property Management Company"** or **"Submitter"**.

Important: A Property management company or Submitter account must be created before moving to the next step.

The screenshot shows a registration form with the following fields:

- Select the Account Type***: Organization
- Are you acting on behalf of the organization as a Third Party representative?***: Yes
- Are you acting as the:***: Property Management Company (highlighted with an orange circle), with a dropdown menu open showing options: Select, Property Management Company, Submitter, and Legal Name.
- TSSA account number of Third Party***: Select Your TSSA Account
- Organization Type***: Select
- Other Name/Type***: Select
- Other Name (The full legal other name of the business/organization as per the business registry)**: Other Name
- Business Identification Number (The number issued by the Province of Ontario for Master Business Licence or small business.)**: Business Identification number
- Business Identification Number Expiry Date**: MM/DD/YYYY
- Corporation Number (The number assigned to a corporation by the provincial designated authority.)**: Corporation Number
- Charity Number (The number assigned to a charity by the CRA when it is registered.)**: Charity Number
- GST/HST Number**: GST/HST Number

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Click the **"TSSA account number of the Third Party"** field and select the **TSSA Account** from the drop-down list.

The screenshot shows a registration form with the following fields:

- Select the Account Type***: Organization
- Are you acting on behalf of the organization as a Third Party representative?***: Yes
- Are you acting as the:***: Property Management Company (with a dropdown menu open showing "Select", "Property Management Company Submitter", and "Legal Name")
- TSSA account number of Third Party***: Select Your TSSA Account (highlighted with an orange circle)
- Organization Type***: Select
- Other Name/Type***: Select
- Other Name (The full legal other name of the business/organization as per the business registry)**: Other Name
- Business Identification Number (The number issued by the Province of Ontario for Master Business Licence or small business.)**: Business Identification number
- Business Identification Number Expiry Date**: MM/DD/YYYY
- Corporation Number (The number assigned to a corporation by the provincial designated authority.)**: Corporation Number
- Charity Number (The number assigned to a charity by the CRA when it is registered.)**: Charity Number
- GST/HST Number**: GST/HST Number

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Enter the name of your organization in the **"Legal Name"** field.

The screenshot shows a registration form with the following fields:

- Select the Account Type***: Organization
- Are you acting on behalf of the organization as a Third Party representative?***: Select
- Legal Name* (The full legal name of a business/ organization as per the business registry or first and last name for a Sole Proprietor)**: Legal Name (highlighted with an orange circle)
- Organization Type***: Select
- Other Name/Type***: Select
- Other Name (The full legal other name of the business/organization as per the business registry)**: Other Name
- Business Identification Number (The number issued by the Province of Ontario for Master Business Licence or small business.)**: Business Identification number
- Business Identification Number Expiry Date**: MM/DD/YYYY
- Corporation Number (The number assigned to a corporation by the provincial designated authority.)**: Corporation Number
- Charity Number (The number assigned to a charity by the CRA when it is registered.)**: Charity Number

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Click the "**Organization Type**" drop-down list. Select one of the following options:

- Sole Proprietor
- Limited Partnership/Limited Liability Partnership (LLP)
- Corporation
- General Partnership
- Charity
- Foreign Corporation Business
- Cooperative
- None of the Above

Important: Based on the "**Organization Type**" you select, certain fields will become mandatory.

Individual - Account for the owner/operator applying for a service with TSSA, i.e. license, registration, information request, etc.

Individual - Account for the personal certificate holder applying for a TSSA certificate, i.e. Gas Technician, Operating Engineering, etc.

Third Party - Account for the Submitter or Property Manager transacting on behalf of a owner/operator for a service with TSSA, i.e. Contractor, Engineering Firm, etc. Create your own Third Party account first, if one does not already exist before transacting on behalf of the owner/operator.

Account Type*

Individual

Are you acting on behalf of the organization as a Third Party representative?*

Select

Organization Name* (The full legal name of a business/ organization as per the business registry or first name for a Sole Proprietor)

Organization Name

Organization Type*

Select

Organization Name/Type*

Organization Name/Type

- Select
- Sole Proprietor
- Limited Partnership/ Limited Liability Partnership (LLP)
- Corporation
- General Partnership
- Charity
- Foreign Corporation/Business
- Cooperative
- None of the Above

Business Identification Number (The number issued by the Province of Ontario for Master Licences or small business.)

Business Identification number

MM/DD/YYYY

Corporation Number (The number assigned to a corporation by the provincial designated authority.)

Corporation Number

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Click the "**Other Name/Type**" field and select one option:

- **Operating as**
- **A Division of**
- **Doing Business as**
- **Not applicable**

If the organization has another name, click "**Other Name**" and enter it in the field.

Individual - Account for the personal certificate holder applying for a TSSA certificate, i.e. Gas Technician, Operating Engineering, etc.

Third Party- Account for the Submitter or Property Manager transacting on behalf of a owner/operator for a service with TSSA, i.e Contractor, Engineering Firm, etc. Create your own Third Party account first, if one does not already exist before transacting on behalf of the owner/operator.

Select the Account Type*

Organization

Are you acting on behalf of the organization as a Third Party representative?*

Select

Legal Name* (The full legal name of a business/ organization as per the business registry or first and last name for a Sole Proprietor)

Legal Name

Organization Type*

Select

Other Name/Type*

Select
Select
Operating as
A Division of
Doing Business as
Not applicable

Other Name (The full legal other name of the business/organization as per the business registry)

Other Name

Business Identification Number Expiry Date

MM/DD/YYYY

Corporation Number (The number assigned to a corporation by the provincial designated authority.)

Corporation Number

Charity Number (The number assigned to a charity by the CRA when it is registered.)

Charity Number

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Click "**Next**" to begin entering the "**Address**" details.

Third Party Account for the owner/operator, reporting manager, purchasing agent and/or other representative for a defined unit of work in Construction Engineering and the like. Create your own Third Party Account first, if one does not already exist before transacting on behalf of the owner/operator.

Select the Account Type*

Organization

Are you acting on behalf of the organization as a Third Party representative?*

No

Legal Name* (The full legal name of a business/ organization as per the business registry or first and last name for a Sole Proprietor)

Legal Name

Organization Type*

Sole Proprietor

Other Name/Type*

Operating as

Other Name* (The full legal other name of the business/organization as per the business registry)

XYZ

Business Identification Number* (The number issued by the Province of Ontario for Master Business Licence or small business)

231453

Business Identification Number Expiry Date

MM/DD/YYYY

GST/HST Number

GST/HST Number

Cancel **Next**

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Enter your address in the **"Search and Select Address"** field.

If your address cannot be found, manually enter your address in the following fields:

- Street Number or Name
- Country
- Province/State
- City
- Postal/Zip Code

Enter your email address in the **"Primary Account Email Address"** field.

Accounts Applications Invoices BPV Owner BPV Insurer

Accounts > Create Account

Create a new account

Account Details **Address** Contact Details Review

Primary Address (The primary location of the business/organization or for individual account type the primary address as it appears on Government issued ID)
Search and Select Address
Addresses can be searched and selected. Users also have the ability to edit the address directly on the fields.)

Street Number/Name* Unit/Suite

Floor Number Country*

Province/State* City*

Postal/Zip Code* Primary Account Email Address

Billing Address (Mailing address to receive invoices, statement of account, etc.)
 Same as Primary Address
Search and Select Address

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If your **Billing Address** is the same as the primary address, place a checkmark beside "**Same as Primary Address**" or manually enter a different address.

Select the "**Addressee**" option if applicable.

Billing Address (Mailing address to receive invoices, statement of account, etc)

Same as Primary Address

Search and Select Address

77 Shuter St, Toronto Ontario M5B 0B8

Addressee

Select

Street Number/Name*

77 Shuter St

Unit/Suite

Floor Number

PO Box ¹
P.O.Box

Country*

Canada

Province/State*

Ontario

City*

Toronto

Postal/Zip Code*

M5B 0B8

Preferred Delivery Method for Billing*

Select

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Click the "**Preferred Delivery Method for Billing**" field and select either "**Email**" or "**Mail**".

Billing Address (Mailing address to receive invoices, statement of account, etc)

Same as Primary Address

Search and Select Address

77 Shuter St, Toronto Ontario M5B 0B8

Addressee

Select

Street Number/Name*

77 Shuter St

Unit/Suite

Floor Number

PO Box ¹
P.O.Box

Country*

Canada

Province/State*

Ontario

City*

Toronto

Postal/Zip Code*

M5B 0B8

Preferred Delivery Method for Billing*

Select

Select

Mail

Email

14

If your **Shipping Address** is the same as the Billing Address, place a checkmark beside "**Same as Billing Address**" or enter a different address.

Select the "**Addressee**" option if applicable.

Shipping Address (Mailing address to receive licences/registrations, inspection reports)

Same as Billing Address

Search and Select Address

77 Shuter St. Toronto Ontario M5B 0B8

Addressee: Select

Attention To * (Individual recipient of correspondences)

Street Number/Name: 77 Shuter St

Unit/Suite

Floor Number

PO Box ⓘ
P.O.Box

Country*: Canada

Province/State*: Ontario

City*: Toronto

Postal/Zip Code*: M5B 0B8

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Click the "**Preferred Delivery Method for Shipping**" field and select either the "**Email**" or "**Mail**" option.

Click the "**Next**" button to enter your "**Contact**" details.

Addressee: Select

Attention To * (Individual recipient of correspondences)

Street Number/Name: 77 Shuter St

Unit/Suite

Floor Number

PO Box ⓘ
P.O.Box

Country*: Canada

Province/State*: Ontario

City*: Toronto

Postal/Zip Code*: M5B 0B8

Preferred Delivery Method for Shipping*

Select

Select

Mail

Email

Cancel Back Next

16 Complete the following fields for your "**Primary Contact Details**".

- Primary Account Phone Type
- Country Code
- Primary Account Phone Number

Click the "**Next**" button to review a summary of information.

Create a new account

Account Details	Address	Contact Details	Review
-----------------	---------	------------------------	--------

Primary Account Phone Type*

Business

Primary Account Phone Country Code*

Canada

Primary Account Phone Number*

Primary Account Phone Extention

Secondary Account Phone Type

Mobile

Secondary Account Phone Country Code

Canada

Secondary Account Phone Number

Secondary Account Phone Extention

Cancel Back **Next**

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If changes are required in your summary, click the edit button and make adjustments to your information.

Account Details Address Contact Details **Review**

Account Details

Account Type
Organization

Account Name
XYZ A Division of Ameila Brown Edit

Legal Name
Ameila Brown

Other Name Type
A Division of

Other Name
XYZ

Organization Type
Sole Proprietor

Are you acting on behalf of the organization as a Third Party representative?
Yes

Are you acting as the:
Property Management Company

TSSA account number of Third Party
IBM O/A IBM LTD - 003019135

GST/HST Number

Business Identification number
PO1234

Address

Primary Address

77 Mutual St Toronto ON Canada, M5B 0B9

Primary Account Email Address
abe@gmail.com Edit

Billing Address

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Scroll to the bottom of the page and place a checkbox beside, "I certify that the information I have provided in the form is true".

Primary Account Phone Country Code
Canada

Upload Document - Consent to Grant Third Party Access* Please [click here](#) for the form

Please upload a file
File Formats: JPEG, PNG, ZIP, PDF Browse

I certify that the information I have provided in this form is true.

Click the [Terms of Use](#) to read and accept the conditions for using the TSSA Customer Portal

I represent the Property Management Company
(I herby attest to my role of Property Management Company user and take all responsibility of the role in accordance with TSSA Portal Policy)

Legal Entity details will be validated.
In some cases, TSSA may update the Legal Name based on our verification process or contact you for additional details.

Account Details cannot be edited after you proceed to Save. Please review and confirm all details.

Cancel Back Save

19 Click the "Terms of Use" option. Terms of Use will appear.

Canada

Upload Document - Consent to Grant Third Party Access* Please [click here](#) for the form

Please upload a file
File Formats: JPEG, PNG, ZIP, PDF Browse

I certify that the information I have provided in this form is true.

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Legal Entity details will be validated.
In some cases, TSSA may update the Legal Name based on our verification process or contact you for additional details.

Account Details cannot be edited after you proceed to Save. Please review and confirm all details.

Cancel Back Save

20 Read and acknowledge the terms by clicking on the "Accept" button.

in these Terms were last revised. By continuing to use this Portal after that date, you agree to the changes.

Account. You will be required to register for an account to use the Portal. Your account username may not be the name of another person or entity in a manner that may cause confusion, or be offensive, vulgar or obscene. Your account username and password are personal to you or your business. You will be responsible for the creation and use of your username and password, and for all activities and transactions that are conducted through your account. You may not transfer or sell access to your account. We will not be liable for any harm related to the loss or compromise of your username or password or the use by anyone else of your username or password. You may not use the Portal or your account without that user's permission except as an authorized third party agent. You will promptly notify us in writing if you discover any unauthorized use of your account or other account-related breach. We may require you to change your username and/or password if we believe your account is no longer secure or if we receive a complaint that your username violates someone else's rights. You will have no liability for any account or your username. We may refuse registration, cancel an account or deny access to the Portal for any reason.

Intellectual Property. The Portal and all data, text, designs, pages, print screens, images, artwork, photographs, audio and video clips, and HTML code, source code, or software that reside or are viewable or otherwise accessible on the Portal (collectively, the "Content") are owned by us. We own a copyright and, in some instances, other intellectual property in the Portal and Content. We may change the Content and features of the Portal at any time. We grant you a limited, conditional, no-cost, non-exclusive, non-transferable, non-sublicensable license to view this Portal and its Content as permitted by these Terms.

Restrictions and uses. You agree that you will not: restrict or inhibit any other person from using the Portal;

Decline

Accept

Company

Company News



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If you are acting on behalf of the organization as a **"Property Management Company"** or a **"Submitter"** upload the **"Consent to Grant Third Party Access"** document.

Canada

Upload Document - Consent to Grant Third Party Access* Please [click here](#) for the form

 Please upload a file
File Formats: JPEG, PNG, ZIP, PDF Browse

I certify that the information I have provided in this form is true.

Click the [Terms of Use](#) to read and accept the conditions for using the TSSA Customer Portal

I represent the Property Management Company
(I hereby attest to my role of Property Management Company user and take all responsibility of the role in accordance with TSSA Portal Policy)

Legal Entity details will be validated.
In some cases, TSSA may update the Legal Name based on our verification process or contact you for additional details.

Account Details cannot be edited after you proceed to Save. Please review and confirm all details.

Cancel Back Save

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Click the **"Save"** button.

Click the [Terms of Use](#) to read and accept the conditions for using the TSSA Customer Portal

Application cannot be edited after you proceed to Next stage. Please review and confirm all details.

Cancel Back Save

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A green banner will display that the account was created successfully. The newly created account can be viewed under the "Accounts" tab on the portal homepage.

Primary Account Phone Type Business	Primary Account Phone Number 4377663862	Ed
Primary Account Phone Country Code Canada		
Portal Manager First Name David	Portal Manager Last Name Smith	
Portal Manager Email davidsmithtssa@gmail.com		

I certify that the information I have provided in this form is true.

Click the [Terms of Use](#) to read and accept the conditions for using the TSSA Customer Portal

Account Creation is successful. please allow 15 min before accessing account information via [Accounts](#) and to proceed with [Application](#).

Application cannot be edited after you proceed to Next stage. Please review and confirm all details.



Congratulations! You have successfully reviewed how to create an "Organization Account" in the TSSA Client Portal.

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Contact Customer Service at 1-877-682-TSSA (8772) or send an email to customerservices@tssa.org in case of any questions.