

# How to link an Existing Account to an Individual Account



This guide will provide you with step-by-step instructions on how to link an "Existing Account" to an "Individual Account" in the TSSA Client Portal.

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

Customer Portal > Accounts

Hi Ada Shelby!

Create Account Link Existing Account

Portal Manager ⓘ

<a href="#">Adam Shelby</a>	Account Number: 003019149	0 Exams	0 Authorizations	0 Work Orders In Progress	0 Unpaid Invoices
<a href="#">Google O/A Google corp</a>	Account Number: 003019136	0 Inventory	0 Authorizations	0 Work Orders In Progress	0 Unpaid Invoices
<a href="#">IBM O/A IBM LTD</a>	Account Number: 003019135	0 Inventory	0 Authorizations	0 Work Orders In Progress	0 Unpaid Invoices
<a href="#">Ray Shelby</a>	Account Number: 003019150	0 Exams	0 Authorizations	1 Work Orders In Progress	0 Unpaid Invoices

Portal User ⓘ

<a href="#">CANADAS</a>	Account Number: 35	Inventory	Authorizations	Work Orders In Progress	Unpaid Invoices
<a href="#">COST</a>	Account Number: 47	Inventory	Authorizations	Work Orders In Progress	Unpaid Invoices

2 Click the "Link Existing Account" button.

The screenshot shows the TSSA Accounts page. At the top, there is a navigation bar with 'Home', 'Accounts', 'Applications', and 'Invoices'. On the right, it says 'BPV Owner' and 'BPV Insurer'. Below the navigation bar, there is a breadcrumb trail: 'Home > Accounts'. The main content area starts with a greeting: 'Hi David Smith!'. To the right of the greeting are two buttons: 'Create Account' and 'Link Existing Account'. The 'Link Existing Account' button is circled in orange. Below the greeting is a 'Portal Manager' section with an information icon. It lists two accounts: 'Aby Shelby' and 'David Smith O/A Dell Enterprises'. Each account entry includes an 'Account Number' and several status indicators: 'Exams', 'Authorizations', 'Work Orders In Progress', and 'Unpaid Invoices'.

3 Select an "Individual" account from the dropdown list.

The screenshot shows the 'Link Existing Account' form. At the top, there is a breadcrumb trail: 'Customer Portal > Accounts > Customer Portal - Link Account'. The main heading is 'Link Existing Account'. Below the heading is a form with a label 'Account Type\*' and an information icon. The dropdown menu is open, showing 'Select' as the current selection, with 'Individual' and 'Organization' as options. The 'Individual' option is highlighted. Below the dropdown is an empty text input field. At the bottom of the form are two buttons: 'Cancel' and 'Validate and link'. The footer of the page contains a 'Need Help?' section with contact information for TSSA's Customer Contact Centre. There is also a logo for 'TECHNICAL SUPPORT & SAFETY' in the bottom right corner.

## 4 Enter the "Account Number".

**TECHNICAL STANDARDS & SAFETY AUTHORITY**  
TSSA

Accounts Applications Invoices

Accounts > Customer Portal - Link Account

### Link Existing Account

Account Type\* ⓘ  
Individual

Account Number\* (Enter the complete TSSA Account number, including all leading zeros, if applicable. This is the assigned TSSA Customer Number and can be four digits long.)  
00301

Customers need to provide specific account information to link the TSSA Customer Portal to an existing account. Please ensure you have the following information on hand:

- Account Access Key, ⓘ

## 5 Select the "Validation Type" as "Account Access Key".

Account Number\* (Enter the complete TSSA Customer/Account number, including all leading zeros, if applicable. The assigned TSSA Customer/Account Number can be found on an issued invoice.)  
100

Customers need to provide specific account information to link the TSSA Customer Portal to an existing account. Please ensure you have the following information on hand:

- Account Access Key, ⓘ

Select Validation Type

Validation Type\*  
Validation Type  
Account Access Key

Cancel Validate and link

## 6 Enter the "Account Access Key".

### Link Existing Account

Account Type\* 

Individual

Account Number\* (Enter the complete TSSA Account number, including all leading zeros, if applicable. This is the assigned TSSA Customer Number and can be found on your invoice.)

00301

Customers need to provide specific account information to link the TSSA Customer Portal to an existing account. Please ensure you have the following information on hand:

1. Account Access Key; 

Select Validation Type

Validation Type\*

Account Access Key

Enter Account Access Key

T6J

OR

Request Account Access Key

Cancel

Validate and link



If you do not have an "Account Access Key", click "Request Account Access Key" to receive it.

Customers need to provide specific account information to link the TSSA Customer Portal to an existing account. Please ensure you have the following information on hand:

1. Account Access Key; 

Select Validation Type

Validation Type\*

Account Access Key

Enter Account Access Key

OR

Request Account Access Key

Cancel

Validate and link

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Need Help?

Anywhere you see an information icon , please click it for more details.

If experiencing technical difficulties, please contact





"Request Account Access Key": This will send an email to the account contact, as they're responsible for providing the key. TSSA is not liable to share the confidential information.

## 8 Select the "Validate and link" option to link the individual account.

Customers need to provide specific account information to link the TSSA Customer Portal to an existing account. Please ensure you have the following information on hand:

1. Account Access Key, 

Select Validation Type

Validation Type\*

Account Access Key 

Enter Account Access Key

OR

Request Account Access Key

Cancel

Validate and link

## 9 A green banner will display that the account connection is successful.

Account connection is successful, please allow 15 minutes for connection to appear. Click [here](#) to return to the Accounts page. 

Cancel

Validate and link

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### Need Help?

Anywhere you see an information icon , please click it for more details.

If experiencing technical difficulties, please contact TSSA's Customer Contact Centre.





Congratulations! You have successfully linked an "Existing Account" to an "Individual Account" in the TSSA Client Portal. It can be viewed under the "Accounts" tab.

If a linked account has a relationship with another account then it will be placed under "**Portal User**" or if not then it will remain under "**Portal Manager**".

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