How to link to an "Existing Organization Account" as the Account Holder

This guide will provide you with step-by-step instructions on how to link to an Existing TSSA Organization account as the Account Holder in the TSSA Client Portal.

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

Home   Accounts   Applications   Invoices

Customer Portal

Hi Ada Shelby

Welcome to the TSSA portal, where, customers can view and manage account information, submit application requests, pay invoices and

New Customers

Create an Individual account if you are applying for:

- A personal certificate

For all other requests create an Organization account

- We require the company's legal entity details, i.e., corporation number or business identification number.

Third Party Property Management Companies

Link to your own TSSA account prior to linking to the owner/operator you wish to transact on behalf of, i.e. pay an invoice, submit an application request,

If you do not have an account with TSSA:

- Please create a Third-Party Property Manager account first,
- Then proceed to linking to the owner/operator you wish to transact on behalf of.

Existing Customers

Link to your TSSA account with,

- Invoice or inspection report or
- Valid authorization (licence/certificate/reg
- Account Access Key

Third Party Submitters

Link to your own TSSA account prior to linkir on behalf of, i.e. submit an application reque

If you do not have an account with TSSA:

- Please create a Third-Party Submitter typ
- Then proceed to linking to the owner/ope

2 Click the **"Link Existing Account"** button.

3 Select an **"Organization"** account type from the dropdown list.

4 Enter the **"Account Number"**.

Link Existing Account

Account Type* ⓘ

Organization

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*

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Customers need to provide specific account information to link the TSSA Customer Portal to an existing account. Please ensure you have one of t

1. *Account Access Key,* ⓘ *or*
2. *Active Authorization and Expiry Date , or*
3. *Invoice information, any invoice issued in the prior year that contains: Invoice number, Invoice amount, Invoice date , or*
4. *Inspection Report Number & Completion Date*

5 Select **"As the Account Holder"** from the dropdown list.

Account Connection ⓘ

Type of Account Connection*

Select ⌄
Select
Third Party - Property Management Company
Third Party - Submitter
As the Account Holder

Validation Type ⌄

Cancel　　Validate and link

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Training Documents	Company News	Anywhere you see an information icon ⓘ, please click it for more details.
Training Videos		If experiencing technical difficulties, please contact TSSA's Customer Contact Centre.

Available Monday to Friday from 8:00 a.m. to 5:00 p.m. (excluding holidays).
Toll-Free: 1-877-682-TSSA (8772)
Email: customerservices@tssa.org

6 Select one of the following **"Validation Type"**:

- Account Access Key

- Active Authorization

- Inspection Report

- Invoice Data

Account Connection ⓘ

Type of Account Connection*

| As the Account Holder | ⌄ |

Select Validation Type

Validation Type*

| Validation Type | ⌄ |

Validation Type
Account Access Key
Active Authorization
Inspection Report
Invoice Data

Validate and link

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7 If you select **"Account Access Key",** enter the **"Account Access Key".**

Account Connection ⓘ

Type of Account Connection*

| As the Account Holder | ⌄ |

Select Validation Type

Validation Type*

| Account Access Key | ⌄ |

Enter Account Access Key

| | OR | Request Account Access Key |

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TSSA

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

Account Connection ⓘ

Type of Account Connection*

| As the Account Holder | ⌄ |

Select Validation Type

Validation Type*

| Account Access Key | ⌄ |

Enter Account Access Key

| | OR | Request Account Access Key |

Cancel   Validate and link

⚠ "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.

9 If you select **"Active Authorization",** enter the following information:

- Authorization Number
- Authorization Expiry Date

Account Connection ⓘ

Type of Account Connection*

As the Account Holder ▾

Select Validation Type

Validation Type*

Active Authorization ▾

Authorization Number* *(A Licence/Registration/Certificate Number Issued by TSSA in the past year as of current date. Enter all the prefix, special characters, spaces and alpha numeric details)*

Authorization Expiry Date* *(Expiry Date noted on a Licence/Registration/Certificate Number Issued by TSSA in the past year as of current date.)*

Cancel   Validate and link

10 If you select **"Inspection Report",** enter the following information:

- Inspection Report Number
- Inspection Completion Date

Account Connection ⓘ

Type of Account Connection*

As the Account Holder ▾

Select Validation Type

Validation Type*

Inspection Report ▾

Inspection Report Number* *(This information is located at the top right side of your report. Please ensure the inspection report was issued in the prior year as of current date.)*

Inspection Completion Date* *(This information is located at the top right side of your report)*

Cancel   Validate and link

11 If you select **"Invoice Data"**, enter the following information:

- Invoice Number
- Invoice Amount
- Invoice Date

Account Connection ⓘ

Type of Account Connection*

As the Account Holder ⌄

Select Validation Type

Validation Type*

Invoice Data ⌄

Invoice Number* *(This information is located at the top right side of your invoice. Please ensure the invoice was issued in the prior year as of current date.)*

Invoice Amount* *(This information is located in the "Total Amount" field at the bottom of your invoice. Please ensure the invoice was issued in the prior as of current date. Format example: 250.00)*

Invoice Date* *(This information is located at the top right side of your invoice. Please ensure the invoice was issued in the prior year as of current date.)*

Cancel   Validate and link

12 Select the **"Validate and link"** option to link the organization account.

As the Account Holder ▾

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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13 A green banner will display that the account connection was 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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                                         Toll-Free: 1-877-682-TSSA (8772)
                                         Email: customerservices@tssa.org

> **ⓘ** Congratulations! You have successfully linked an "Existing Account" to an "Organization 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 **"Portal Manager".**

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