

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.

The screenshot shows the TSSA Client Portal interface. At the top, there is a dark blue navigation bar with the TSSA logo on the left and four menu items: "Home", "Accounts", "Applications", and "Invoices". The "Accounts" tab is highlighted with an orange circle. Below the navigation bar is a light blue banner that says "Customer Portal". The main content area is white and contains a personalized greeting: "Hi Ada Shelby". Below the greeting, there is a welcome message: "Welcome to the TSSA portal, where, customers can view and manage account information, submit application requests, pay invoices and...". The page is divided into two columns. The left column has three sections: "New Customers" (with a sub-section for "Individual" and "Organization" accounts), "Third Party Property Management Companies", and "If you do not have an account with TSSA:". The right column has two sections: "Existing Customers" and "Third Party Submitters", both with sub-sections for "Link to your TSSA account" and "If you do not have an account with TSSA:". Each section contains a list of requirements or steps.

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/req
- Account Access Key

Third Party Submitters

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

If you do not have an account with TSSA:

- Please create a Third-Party Submitter type
- Then proceed to linking to the owner/operator

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

The screenshot shows the TSSA Accounts page. At the top, there is a navigation bar with the TSSA logo, 'Home', 'Accounts', 'Applications', and 'Invoices'. On the right, there are links for 'Profile' and 'Sign out', and roles 'BPV Owner' and 'BPV Insurer'. Below the navigation bar, the page title is 'me > Accounts'. The main content area displays a greeting 'David Smith!' and a 'Manager' role. Two buttons are visible: 'Create Account' and 'Link Existing Account', with the latter circled in orange. Below the buttons, there is a table of accounts:

Account Name	Account Number	Exams	Authorizations	Work Orders In Progress	Unpaid Invoices
by Shelby	003018036	0	0	0	0
David Smith O/A Dell Enterprises	003018017	0	0	0	0
ne Lee	003018003	0	0	0	0

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

The screenshot shows the 'Link Existing Account' form. The breadcrumb trail is 'Customer Portal > Accounts > Customer Portal - Link Account'. The form title is 'Link Existing Account'. There is a label 'Account Type*' with an information icon. A dropdown menu is open, showing 'Select' as the selected option, with 'Individual' and 'Organization' as other options. Below the dropdown is an empty text input field. At the bottom of the form, there are two buttons: 'Cancel' and 'Validate and link'. The footer contains links for 'Documents' and 'Videos', a 'Company' section with 'Company' and 'Company News' links, a 'Need Help?' section with a message and contact information, and the TSSA logo.

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 the following:

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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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.

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

Cancel

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



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

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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

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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.

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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**".

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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.