How to submit "BPV Inspection" application



This guide will provide you with step-by-step instructions on how to submit an application for "BPV Inspection" in the TSSA Client Portal.



Important: Contracting individuals/ companies will submit the inspection requests on behalf of the business owner as **"Third Party Submitters"**.



Click **"Create Account"** if you do not have a TSSA individual or organization account.

Click **"Link Existing Account"** if either you or your company already possesses an account with TSSA. Proceed to establish the connection with that existing account. You will then be associated with your personal or company account as either a **Portal Manager** or a **Portal User**.

Customer Portal

Hi Ada Shelby

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

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.
- The [Consent to Grant Third Party Access] form will need to be completed.

Existing Customers

Link to your TSSA account with,

- Invoice or inspection report or
- Valid authorization (licence/certificate/registration, etc.) or
- 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 account first,
- Then proceed to linking to the owner/operator you wish to submit an application request for.
- The [Consent to Grant Third Party Access] form will need to be completed

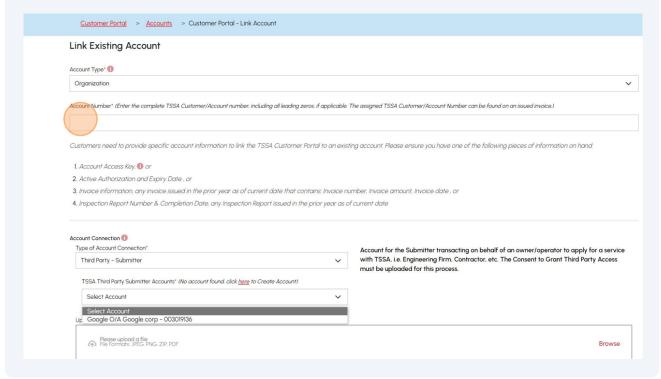


Link Existing Account

After your account has been linked and visible under **Portal Manager / Portal User**, you can link to your **customer's account** as a **Third-Party Submitter**.

From the "Link Existing Account" page, select "Account Type" as "Organization".

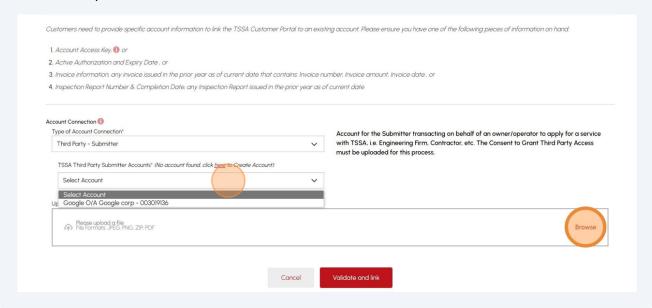
Enter your "Customer's TSSA Account Number" and select "Third Party Submitter" from the drop-down list.



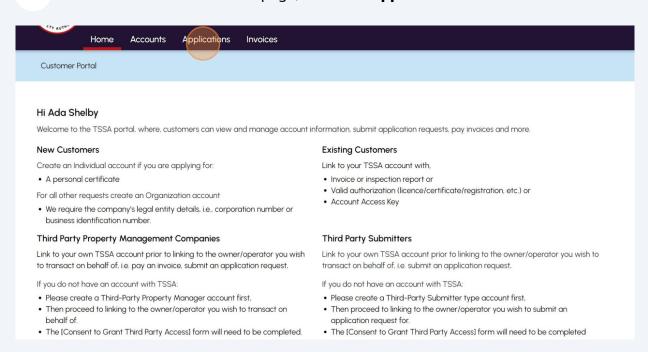
Your account should be visible in the TSSA Third Party Submitter Accounts dropdown list. If you don't see it, please contact 1-877-682-8772 or email customerservices@tssa.org with your TSSA Account number and name.

Click the **Browse** button to upload **"Consent to Grant Third Party Access".** Click the **"Validate and Link"** button to link the **Customer Account.**

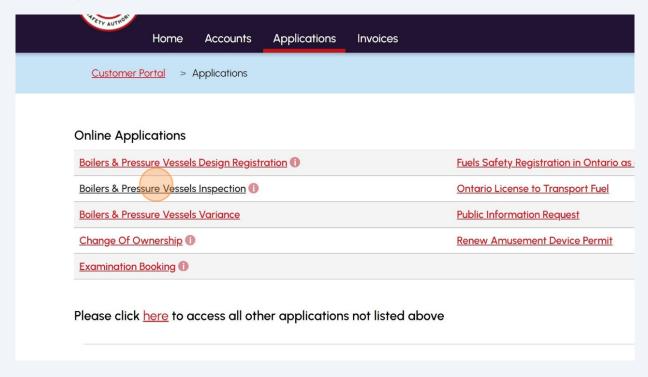
Once your customer's account has been validated and linked to your account, you'll see it listed under **"Submitter Client Account"** on the **"Accounts"** page of the portal.



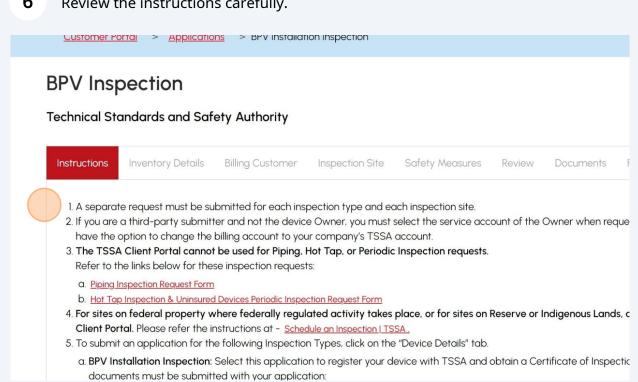
4 From the Client Portal homepage, click the "Applications" tab.



Click "Boilers & Pressure Vessels Inspection" link under "Online Applications".

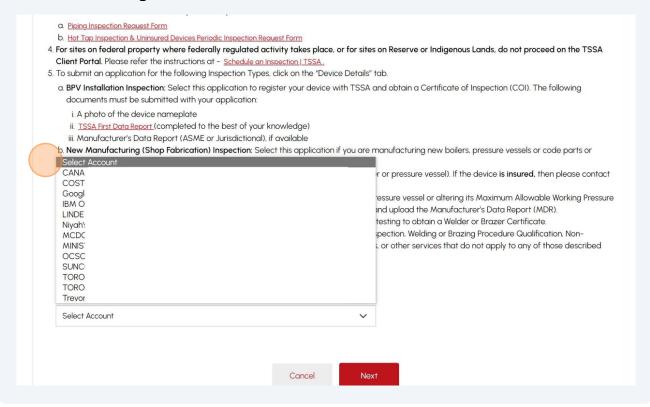


Review the instructions carefully.



Select a "TSSA Customer Account". Click "Next" to begin entering the "Inventory Details".

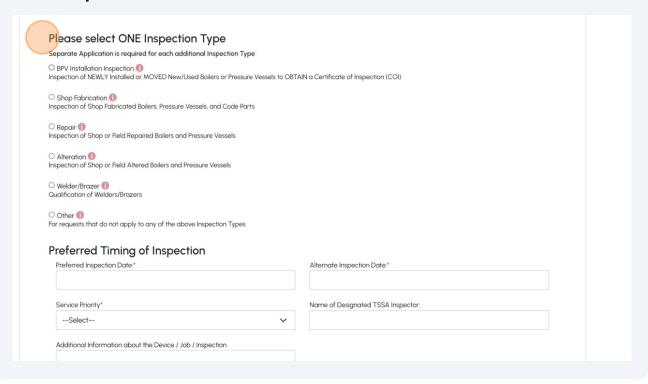
Note: For Installation inspection, if you are a **third-party submitter/contractor**, select the **account of the device owner**, since the **Certificate of Inspection** will be issued in the name of the device owner. You can change the billing account in the **"Billing Customer"** tab.



8 Select one of the following "Inspection Type":

- BPV Installation Inspection
- Shop Fabrication
- Repair
- Alteration
- Welders/Brazers
- Other/ Special

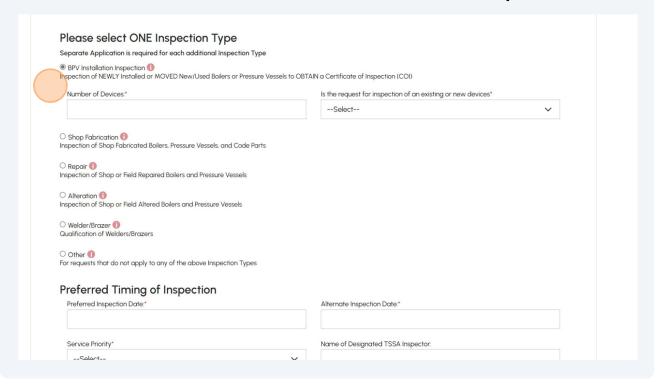
Note: A separate request must be submitted for each **inspection type** and each **inspection site.**



If you selected "BPV Installation Inspection", then enter the total "Number of Devices".

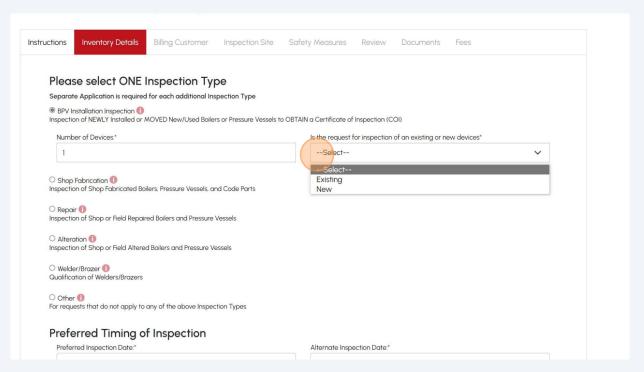
Note: Installation Inspections must be prepaid before we can schedule an inspection.

The **prepayment amount** is per device and will be calculated and shown under the **"Fees"** tab and includes the fees for the **"Certificate of Inspection" (COI).**



Answer, "Is the request for inspection of existing or new devices?" Select "Existing" or "New".

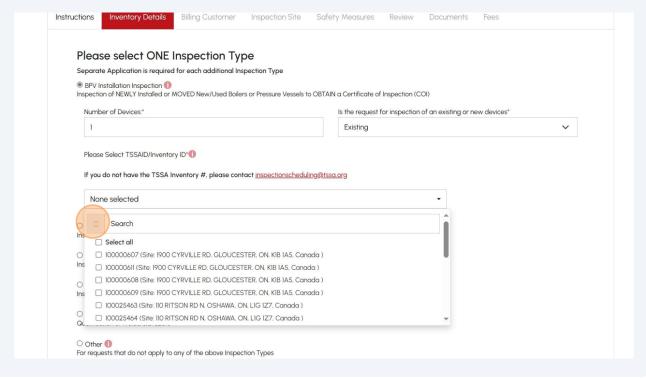
Note: Select "Existing" only if you have the "TSSA Inventory Number / UID".



If you click the **"Existing"** option from the dropdown menu, then select **"TSSAID/Inventory ID"** from the dropdown list.

Tip: You can even search by the **site location/address** of the Inventory and start by typing the number or **location/city/address** of the device.

Note: For multiple devices, only select the **Inventory Number** of devices that are located at the same site. If devices are located at different sites, then request a separate application for each site.

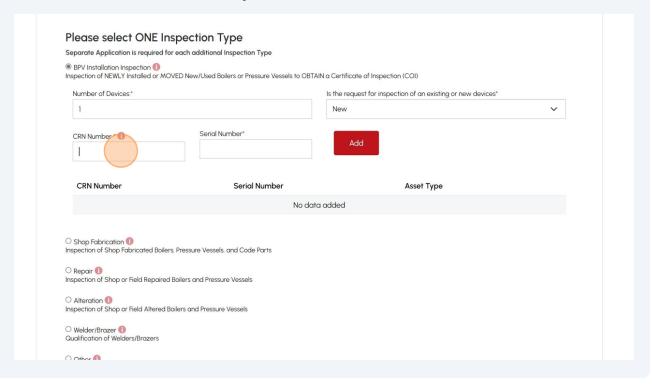


12 If you selected "New", then enter the "CRN Number" and "Serial Number".

Note: Select "New" if:

- This is the installation of a new boiler(s) or pressure vessel(s)
- The Device is moving to **another site location** (even within the same building)
- The Device was never registered with TSSA and does not have a TSSA Inventory UID

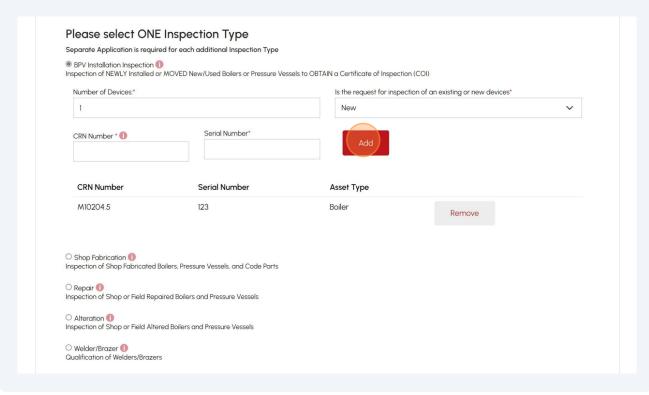
Enter the **Serial Number** as per the **nameplate** or as mentioned in the **Manufacturer's Data Report.**



13 Click the "Add" button.

Note: Select the "Add" button again to add more Device CRN Numbers.

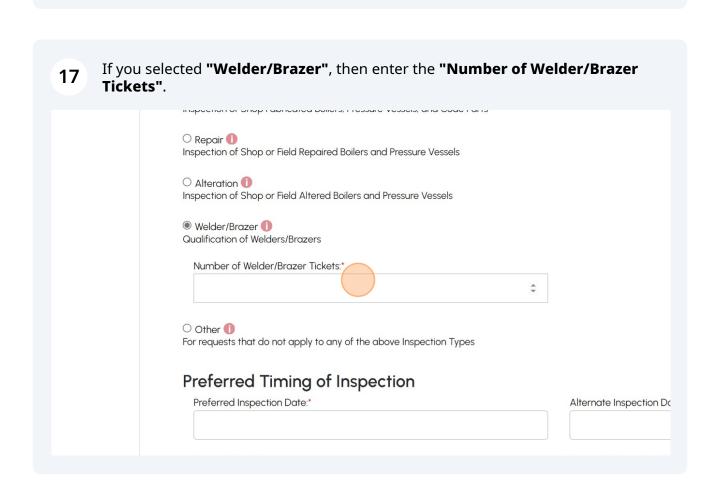
Tip: If the **CRN Number** cannot be added, then please send an email to - **"inspectionscheduling@tssa.org"** with the **CRN Number** and the **photo of the device nameplate. Subject Line:** BPV Install Inspection - Portal - Unable to add CRN.



If you selected "Shop Fabrication", then select either the "Conventional" or the 14 "Nuclear" option. Please select ONE Inspection Type Separate Application is required for each additional Inspection Type O BPV Installation Inspection (1) Inspection of NEWLY Installed or MOVED New/Used Boilers or Pressure Vessels to OBTAIN a Certificate of Ir Shop Fabrication (1) Inspection of Shop Fabricated Boilers, Pressure Vessels, and Code Parts Conventional O Nuclear O Repair 1 Inspection of Shop or Field Repaired Boilers and Pressure Vessels O Alteration 1 Inspection of Shop or Field Altered Boilers and Pressure Vessels O Welder/Brazer 1 Qualification of Welders/Brazers O Other (1) For real lests that do not apply to any of the above Inspection Types

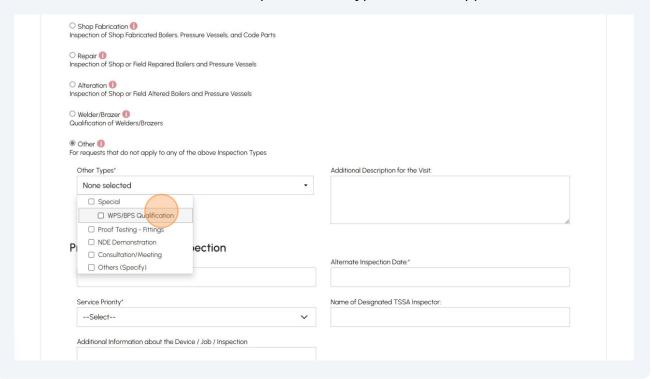
15	If you colorted "Donnie" then colort the "Field Dovice Information"			
13	If you selected "Repair", then select the "Field Device Information".			
	Tip: Alternatively, you can start typing the Inventory Number or CRN .			
	BPV Installation Inspection BPV Installation Inspection of NEWLY Installed or MOVED New/Used Boilers or Pressure Vessels to OBTAIN a Certificate of Inspection			
	Shop Fabrication			
	Repair (1) Inspection of Shop or Field Repaired Boilers and Pressure Vessels			
	If the Inventory ID is not available or is not visible in the list, please contact TSSA Workforce Planning at inspection			
	Field Device Information (Example, TSSA ID or Inventory Number/ CRN Number)* Please Select			
	InsPlease Select 1000°			
	Qualification of Welders/Brazers			
	Other 1 For requests that do not apply to any of the above Inspection Types			

If you selected "Alteration", then select the "TSSAID or Inventory ID/CRN 16 Number". **Tip:** Alternatively, you can start typing the **Inventory Number** or **CRN.** Inspection of Shop Fabricated Boilers, Pressure Vessels, and Code Parts Repair
 Repair
 Repair
 Repaired Boilers and Pressure Vessels Alteration (1)
 Inspection of Shop or Field Altered Boilers and Pressure Vessels If the Inventory ID is not available or is not visible in the list, please contact TSSA Workforce Planning at $\underline{inspectionscheduling@tssa.org}$. Please Select TSSAID or Inventory ID/CRN Number (or 5AN CRN, if available)* Qu --Please Select--Preferred Timing of Inspection Preferred Inspection Date:* Alternate Inspection Date:* Service Priority* Name of Designated TSSA Inspector: --Select--Additional Information about the Device / Job / Inspection

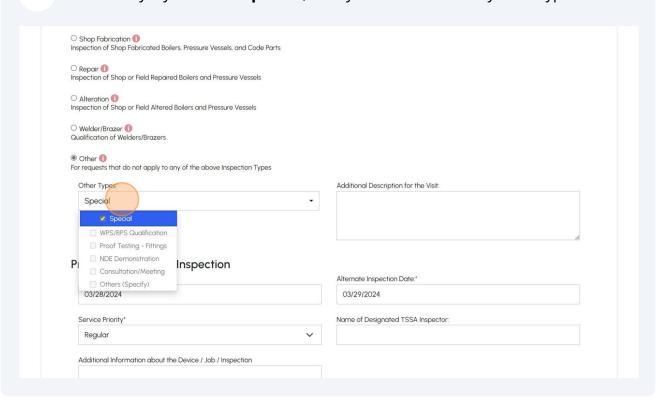


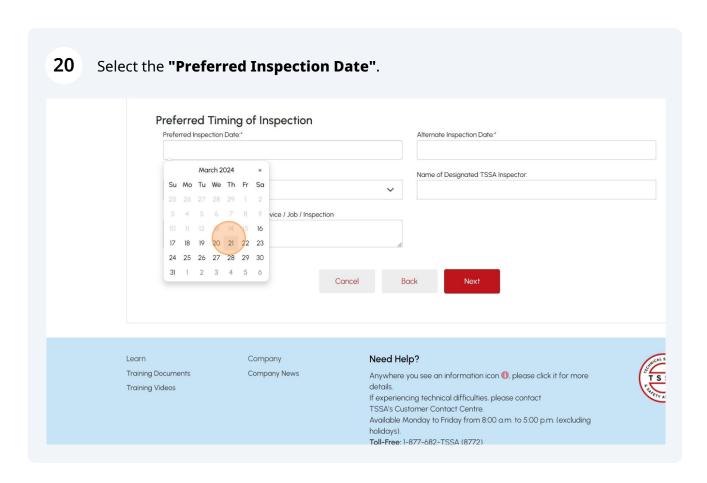
If you select **"Other"** and choose the types from the dropdown list, then you will be able to select multiple options.

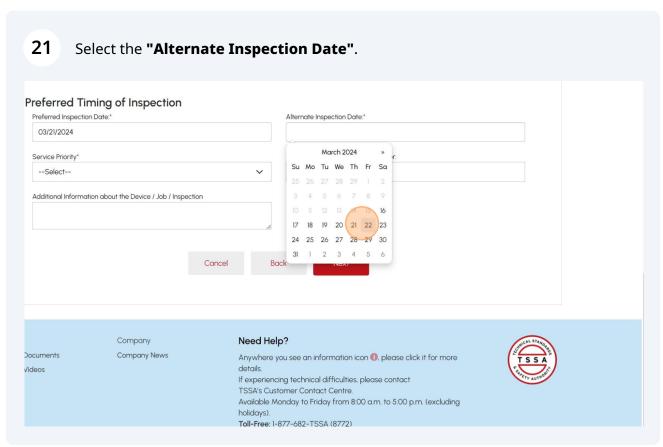
Note: Provide further description for the type of work, if applicable.



19 **Note:** Only if you select **"Special"**, then you cannot select any other types.







22 Select the **Priority** as **"Regular"** or **"Expedited/Rush".** Click the **"Next"** button. **Note: Expedited/Rush** requests will have an additional charge. Preferred Timing of Inspection Preferred Inspection Date:* Alternate Inspection Date:* 03/21/2024 03/22/2024 Name of Designated TSSA Inspector: Service Priority* --Select--Additional Information about the Device / Job / Inspection Need Help? Learn Company Training Documents Company News Anywhere you see an information icon (1), 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).

23 The "Billing Customer" tab will appear. Answer, "Is Billing Customer Same as Device Owner?" Select "Yes" or "No". Note: Select "Yes" if invoices have to be issued in the name of the Device Owner. <u>Customer Portal</u> > <u>Applications</u> > BPV Installation Inspection **BPV** Inspection Technical Standards and Safety Authority Instructions Inventory Details Billing Customer Inspection Site Safety Measures Review Documents Fees Is Billing Customer Same as Device Owner?* ○ Yes ○ No Billing Account Number *1 Purchase Order Number (if applicable) Billing To Account Address* Cancel Back

If you selected, Yes-is Billing Customer Same as Device Owner, then the "Billing Account Number" will appear.

BPV Inspection

Technical Standards and Safety Authority

Instructions Inventory Details Billing Customer Inspection Site Safety Measures Review Documents Fees

Billing Customer Same as Device Owner?*

Billing Customer Same as Device Owner?*

Billing To Account Number **

Billing To Account Address*

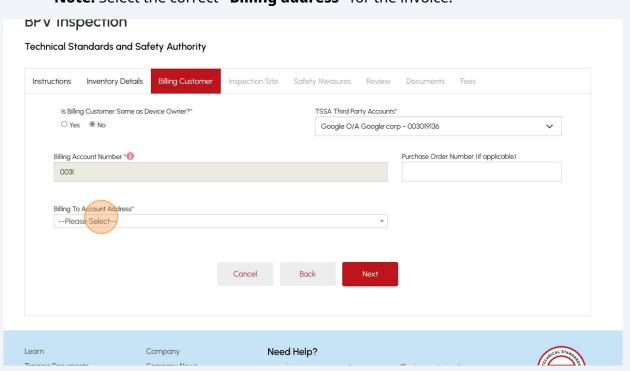
--Please Select--
Cancel Back Next

If you select "No", then select the "TSSA Third Party Accounts" from the 25 dropdown list. **Note:** Select "No" if invoices should be issued in the name of the **Third Party Submitter/Contractor.** <u>ustomer Portal</u> > <u>Applications</u> > BPV Installation Inspection V Inspection nnical Standards and Safety Authority Billing Customer Inspection Site Safety Measures Review Documents Fees tructions Inventory Details TSSA Third Party Accounts* Is Billing Customer Same as Device Owner?* ○ Yes

No --Please Select--Billing Account Number *10 Purchase Order Number (if applicable) Billing To Account Address*

Select the "Billing To Account Address" and click "Next" to move to the "Inspection Site" tab.

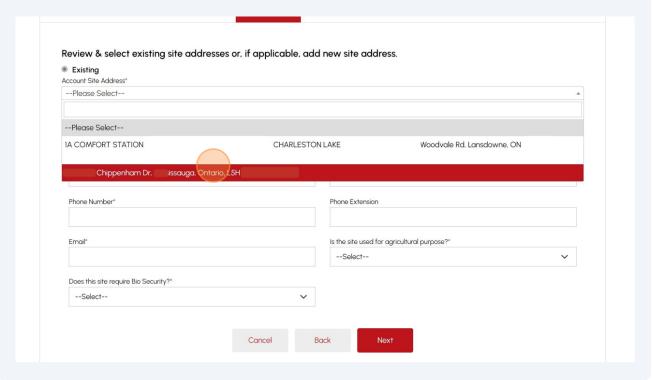
Note: Select the correct "Billing address" for the invoice.



27 Select either "Existing" or "New".

If you select "Existing", then select "Account Site Address".

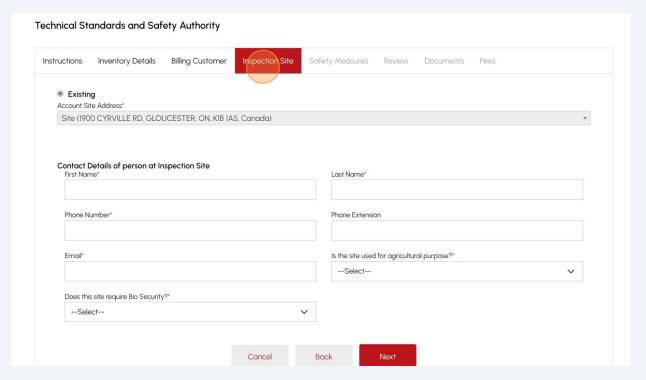
Note: The **"Existing"** option indicates that the site address exists in the **device owner/your account.** Check or search the addresses here before adding a new site address.

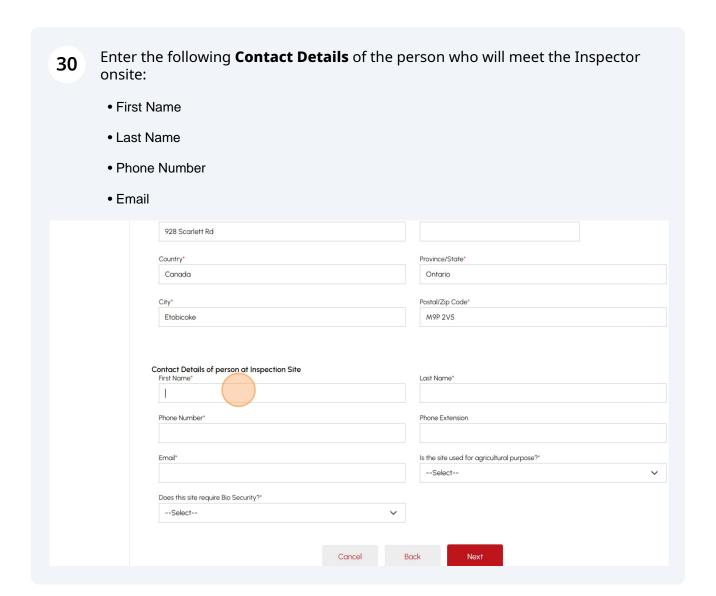


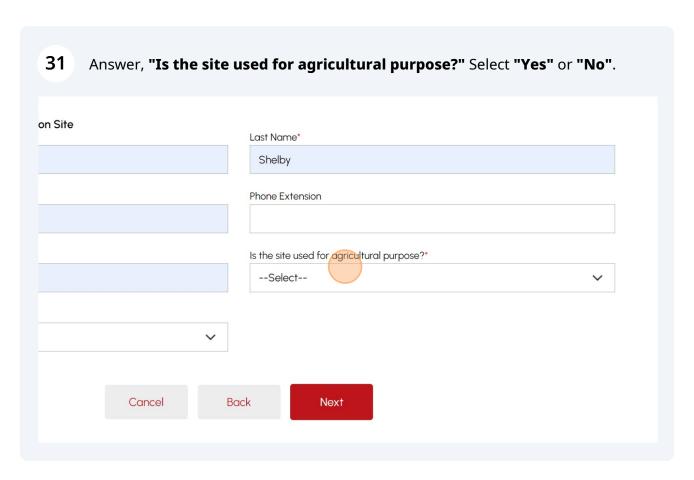
select "New", then enter the "Site Add	
Review & select existing site addresses or, if applicable, add Existing New Site Address Search and Select Address (Addresses can be searched and selected. You may also edit or directly enter the address)	d new site address. Site Name
Street Number/Name* Country*	Unit/Suite Province/State*
City*	Postal/Zip Code*
Contact Details of person at Inspection Site First Name* Phone Number*	Last Name* Phone Extension

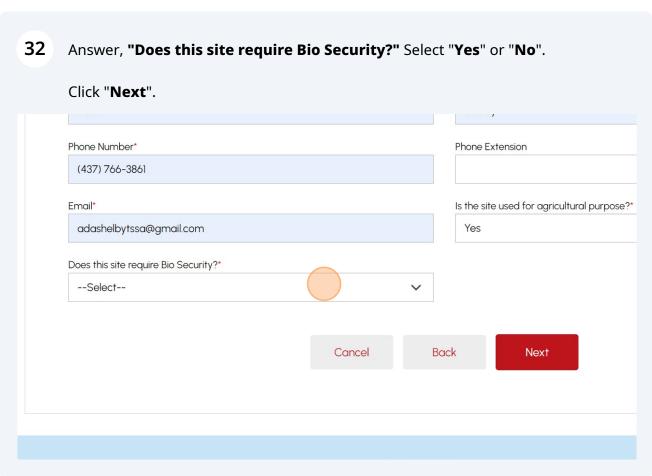
Note: For the "Repair" and "Alteration" inspection types, the "Inspection Site" tab will be displayed differently.

The **Site Address** will be the current location of the selected inventory and cannot be changed.

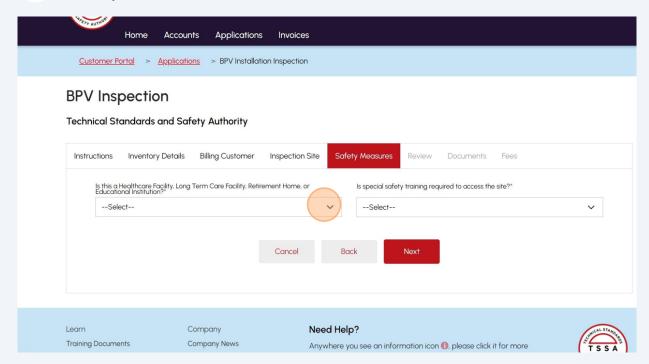


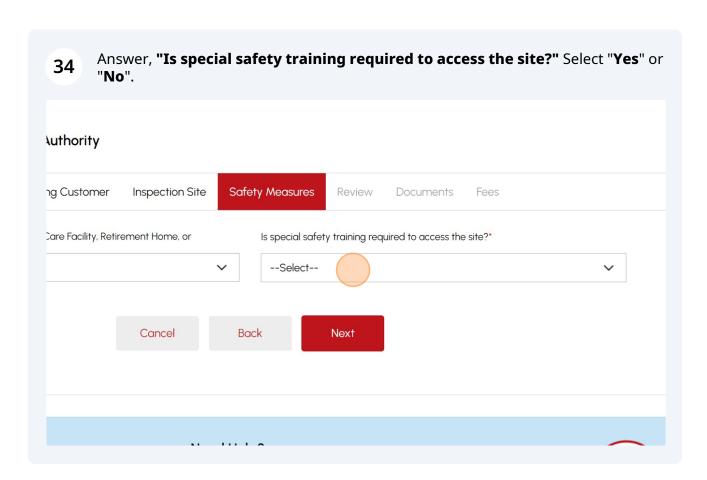




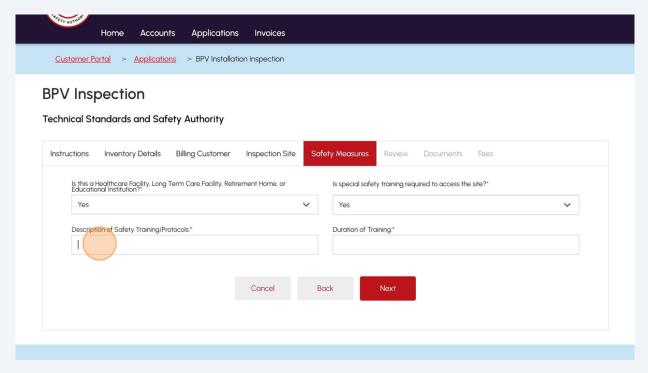


Answer, "Is this a Healthcare Facility, Long Term Care Facility, Retirement Home, or Educational Institution?" Select "Yes" or "No".

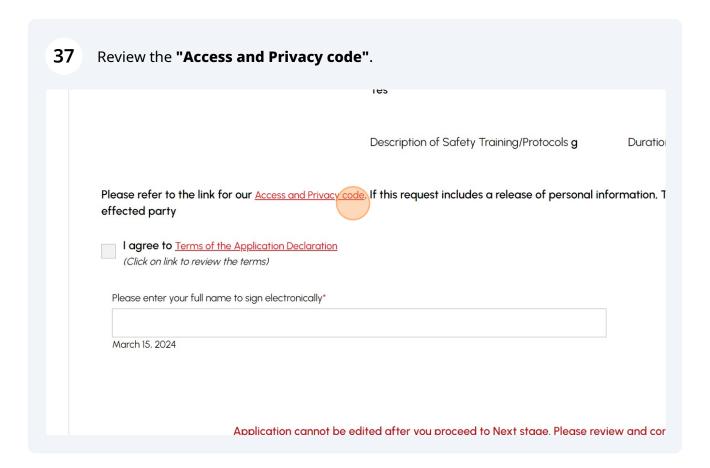




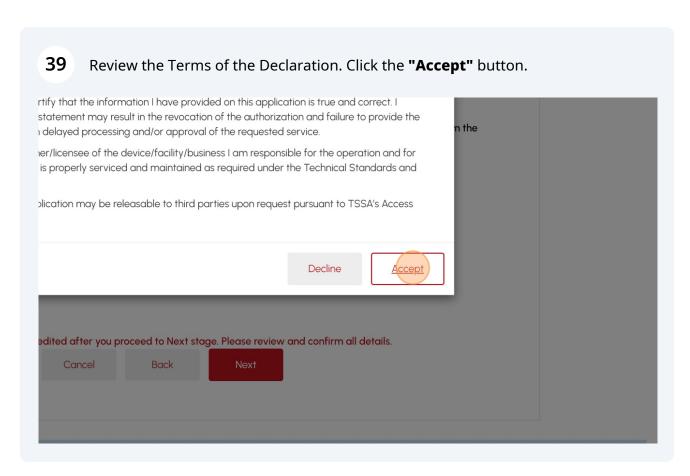
If you selected "Yes", enter the "Description of Safety Training/Protocols" and "Duration of Training". Click "Next" to review the summary of information you entered.

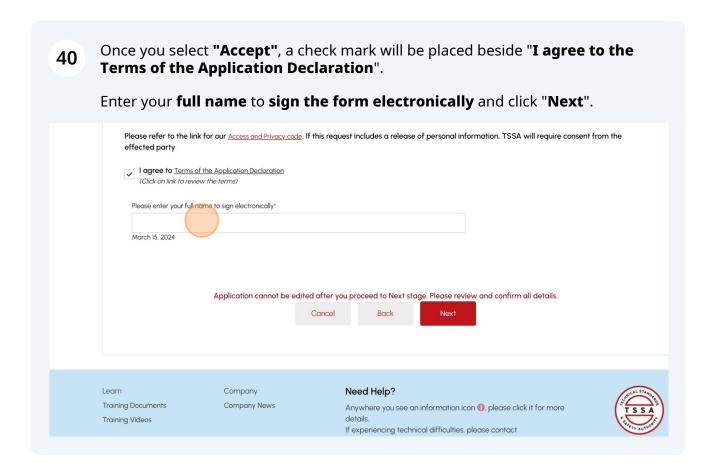


36 **Review** the entered information. Click "Print Form" to print a copy. Note: You will not be able to edit any submitted information once you click "Next". al Standards and Safety Authority Inventory Details Billing Customer Inspection Site Safety Measures Documents Fees Print Form ventory Details Inspection Type BPV Installation Inspection Service Priority Regular Preferred Inspection Date 03/21/2024 Name of Designated TSSA Inspector Ada Shelby Additional Information about the Device / Job / Inspection Number Of Devices 1 Is the request for inspection of an existing or new devices Existing Selected TSSAID/Inventory ID 100025465 (Site: 148 Woodvale Rd, Lansdowne, ON, KOE 1LO, Canada)



Click the "Terms of the Application Declaration". Description of Safety Training/Protocols g Duration of Training h Please refer to the link for our Access and Privacy code. If this request includes a release of personal information, TSSA will require consent from the effected party I agree to Terms of the Application Declaration (Click on link to review the Berta) Please enter your full name to sign electronically. March 15, 2024 Application cannot be edited after you proceed to Next stage. Please review and confirm all details. Cancel Book Noxt Learn Company Training Documents Company News Need Help? Anywhere you see an information icon ① please click it for more

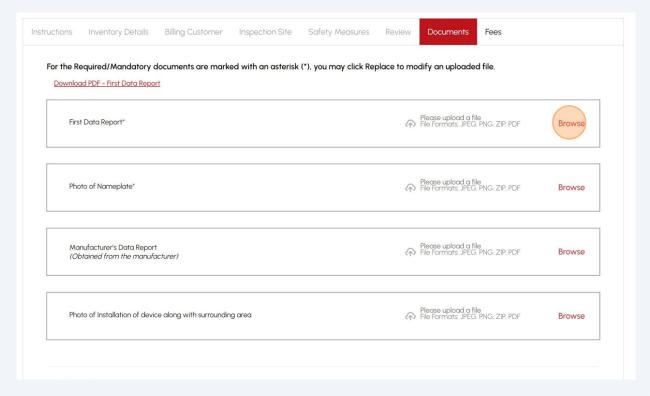




41 Click "Browse" to upload the required documents.

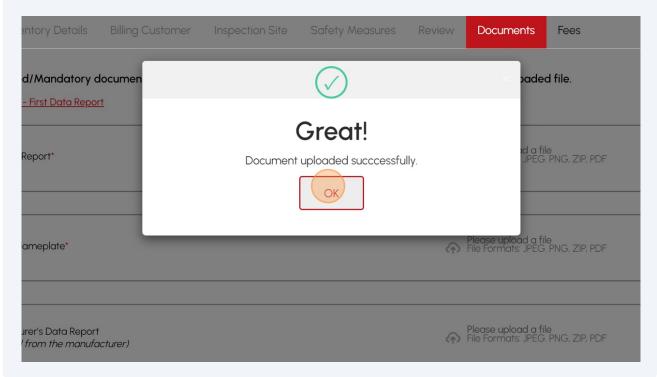
Acceptable document formats include JPEG, PNG, ZIP, and PDF. Otherwise, an error will be displayed.

Note: For **Installation Inspections**, upload the mandatory documents for each device to be inspected. Documents are optional for all other types of inspection requests.



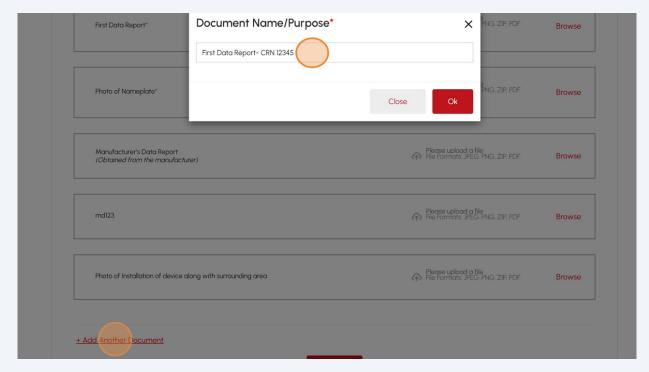
A notification will appear the document has been uploaded successfully. Click "OK" to close the window.

Note: To replace an incorrect **document/file** already uploaded, click **"Replace"** and then select the correct **"document/file".**



43 To add additional documents, click the "Add Another Document".

Enter the "**Document Name/Purpose"** and click the **"Ok"** button to proceed to upload the document/file.



The document name will appear on the "Documents" tab. Select "Browse" to 44 upload the required document. Once you upload all the documents, click "Next" to begin the payment process. Please upload a file File Formats: JPEG. PNG, ZIP, PDF Photo of Installation of device along with surrounding area Please upload a file File Formats: JPEG. PNG, ZIP, PDF Remove First Data Report- CRN 12345 Browse + Add Another Document Need Help? Training Documents Company News Anywhere you see an information icon \P 0, 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).

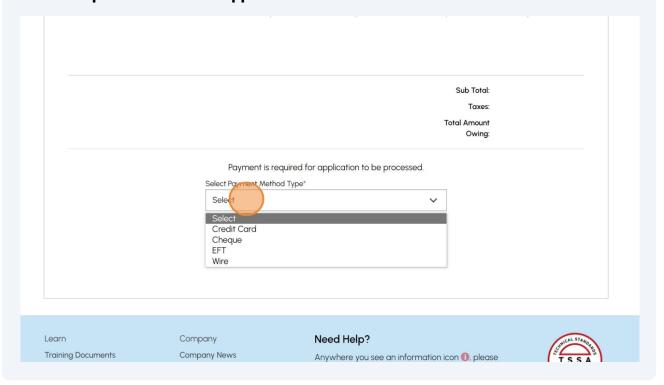
The detailed **prepayment fees** for the application will appear. **Review** the details.

Select one of the payment methods:

- Credit Card
- Cheque
- EFT
- Wire

Note: Prepayment is applicable only for **Installation inspections.** For all other inspection requests, click on the **"Submit"** button. Inspection will be scheduled based on **urgency/nature of the job / Inspector's availability** and a confirmation **notification** will be sent.

Important: Note the **Application Number** for future reference.



If you selected "Cheque", then click on the "Payment Details" hyperlink. The payment details will appear.

Taxes: \$50.57
Total Amount Owing: \$541.07

Payment is required for application to be processed.

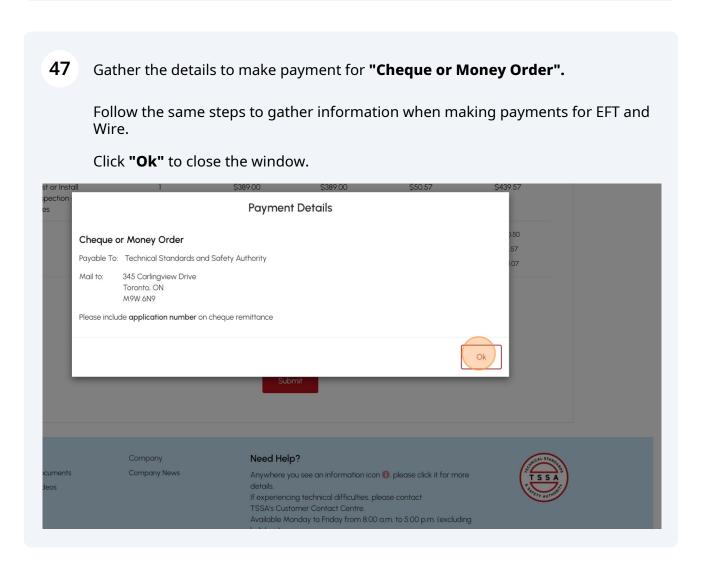
Select Payment Method Type*

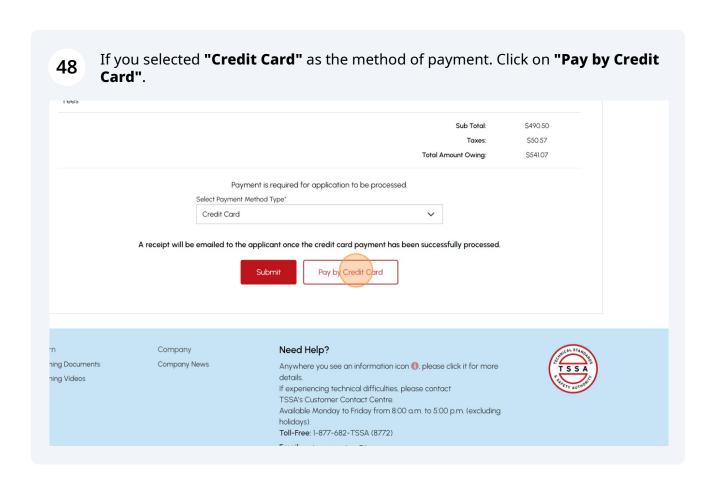
Cheque

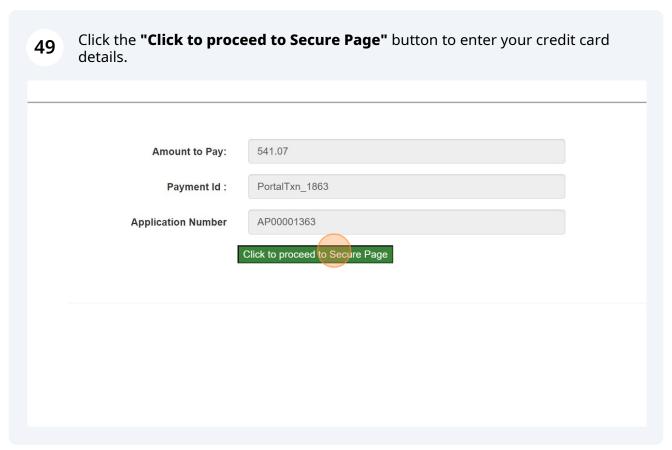
Click to see Payment Details

Submit

Need Help?

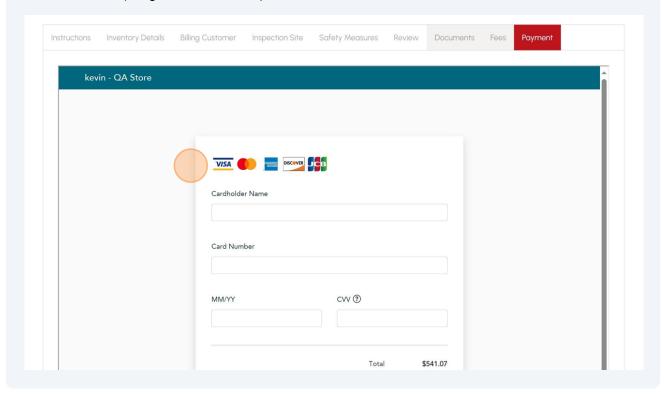






50 Enter the Credit Card details:

- Cardholder Name
- Card Number
- MM/YY (Month and Year)
- CVV (3-digit number on card)



Cardholder Name
Ada Shelby

Card Number

S454 5454 5454

MM/YY

CVV ①

09/29

| Total \$541.07

The **Transaction receipt** will appear. "**Print**" a copy of the **Transaction Receipt** for your records.

You will receive an email confirmation and an official receipt once the payment has been completed.

Transaction Approved



Transaction Approved

Order Number: PortalTxn_1863

Amount: \$541.07

Last 4 Digit of Card Number: *****5454

Transaction Type: 200

Approval Code: KN2

53

Reference Number: 66018854001

Transaction Number: 9264-(

Transaction Datetime: 2024-03-15 07:35:28



Contact Customer Service at 1-877-682-TSSA (8772) or send an email to customerservices@tssa.org in case of any questions and provide the Application Number received, with your query.