

# TSSA PORTAL TRAINING GUIDE

Work Instructions and Screenshots to Manage Logins, Submit a Record of Inspection and a Cancellation of Insurance Notification

Insurer Processes



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## 1.1 Redeem Invitation

All Portal users will be required to register with TSSA Administrative Support. A Portal Contact Record will be created under your company's account with an invitation to the Portal emailed to user. To register a new user please contact customer Support (2) two business days in advance. To redeem your portal invitation, follow the instructions below:

1. Open Invitation Email sent from TSSA Administrative Support and select the "Redeem Invitation" Link to redeem your account invitation in the portal.

User should be re-directed to the portal Redeem Invitation Login Page

2. Select the [Register](#) Button to redeem invitation

TECHNICAL STANDARDS & SAFETY AUTHORITY

Sign In Redeem Invitation

Sign up with an invitation code

\* Invitation Code

Register

### Register a New Account

3. Enter a unique password in the Password field. All Passwords must be a minimum of (8) eight characters with an uppercase character. There must also include a numerical, or special character.
4. Re-enter your password in the Confirm Password field, then select the Register button.



[Sign In](#) [Redeem Invitation](#)

Redeeming code: **leEAPUhv2tywimrVjLdvx4-pAZr5yRy-zMFLYMy0x48uLDul9Q4fntmG8lpEzjJKSYrXCmqM1XnubE3v3-hJYk2yC6A9zJZaMMfNnCRS4NFQNgivlVXIStBKCS4GWjniHzW6r8pCD2EkwoMg0s5mzC9KEy9oTowCyZvj6CdlfY-**

Register for a new local account

\* Business Email

\* Password

\* Confirm Password

Once your password has been validated you will be redirected to your Profile page for Validation.

### Validate your Profile

5. Review your profile to validate your following contact details to ensure the TSSA has the correct information:
  - Name
  - Phone
  - Email
  - Billing address
6. The system requires that you validate that you confirmed your email address. Select the Confirm Email button in the top right corner. See Screenshot below.


### The system should have sent a Confirm your Account Email Notification

7. Select the Complete Registration Link in the email to finish your account validation.
8. The system will display a confirmation message once your email has been confirmed successfully.



## Email Validation Button

### Profile

 jessica myrie

Profile

Security

Change Password

**Your email requires confirmation.** [Confirm Email](#)

#### Your Information

##### General

**First Name \***  
jessica

**Last Name \***  
myrie

**E-mail**  
jmyrie@tssa.org

**Business Phone**

**Company Name**  
JESSICA TEST OWNER

##### Billing Address

**Street 1**  
100 King St W

**Province**  
ON

**Street 2**

**Postal Code**  
M5X 1C9

**Street 3**


**Country**  
Canada

**City**  
Ajax

[Update](#)

## Email Validation Confirmation

### Profile

 jessica myrie

Profile

Security

Change Password

**Your email has been confirmed successfully.** [x](#)

#### Your Information

##### General

**First Name \***  
jessica

**Last Name \***  
myrie

**E-mail**  
jmyrie@tssa.org

**Business Phone**

**Company Name**  
JESSICA TEST OWNER



## 1.2 Reset Password

Resetting your password is a self-serve function within the portal. If you have forgotten your password, or would simply like to make a change you can initiate a password reset from the user login page. To reset your password, follow the instructions below:

1. Select the “Forgot your Password?” button from the portal Login Page.

This screenshot shows the top portion of the TSSA login page. At the top left is the TSSA logo and the text 'TECHNICAL STANDARDS & SAFETY AUTHORITY'. On the top right, there is a 'Sign In' link. Below the header, there are two buttons: 'Sign In' and 'Redeem Invitation'. The main heading is 'Sign in with a TSSA account'. Below this, there are two input fields: '\* User name/Business Email' and '\* Password'. A 'Remember me?' checkbox is located below the password field. At the bottom of the form area, there are two buttons: 'Sign In' and 'Forgot Your Password?'. The background of the page is the same industrial machinery image seen in the banner above.

2. Enter your user name/Business Email and select the send button.

This screenshot shows the 'Forgot your password?' form. The heading 'Forgot your password?' is at the top left. Below it is a single input field labeled '\* Email' containing the text 'training@tssa.org'. Underneath the input field, there is a small instruction: 'Enter your email address to request a password reset.' At the bottom of the form, there is a blue 'Send' button. The background of the page is the same industrial machinery image.



The system should have sent a Reset Password Confirmation Email with the following message displayed

Forgot your password?

Please check your email to reset your password.

- Retrieve the email confirmation and select the “Reset Password” link in the message to initiate your password reset.
- Enter your new password, then confirm your new password as displayed below. Then select the “Reset” button to save your changes.

Reset Password

New Password

Confirm New Password

Once your password has been validated and saved by the system you will be directed back to the portal login page to login.

- Enter your existing username/ business email and your new password to login. Then select the “Sign In” button.

Sign in with a TSSA account

\* User name/Business E mail

\* Password

Remember me?



## 1.3 Manage Profile


Portal users can manage their contact phone number and business address through the Portal Profile page. On this page users can view their latest contact information, and make updates that will be captured and saved in the system. To view and perform profile updates, follow the steps below:

1. You will notice your name in the top right corner of the screen as a menu label. This is an indicator of the user which is logged into the portal. This is also the place where a user can select to view their profile or Sign out of the Portal.
2. Select the Profile option from your User Name Menu in the top right corner.



3. Override or populate the phone and/or Billing Address fields that need to be updated. Once complete select the “Update” button to save the changes.

## Profile

 MALAHKAI GORDON

Profile

Security

Change Password

### Your Information

#### General

<b>First Name *</b> MALAHKAI	<b>Last Name *</b> GORDON
<b>E-mail</b> JESSICA_MYRIE@YAHOO.CA	<b>Business Phone</b> 416-123-4567
<b>Company Name</b> JESSICA'S TEST INSURER	

#### Billing Address

<b>Street 1</b> 345 Carlingview Dr	<b>Province</b> ON
<b>Street 2</b> 	<b>Postal Code</b> M9W 6N9
<b>Street 3</b> 	<b>Country</b> Canada
<b>City</b> Toronto	

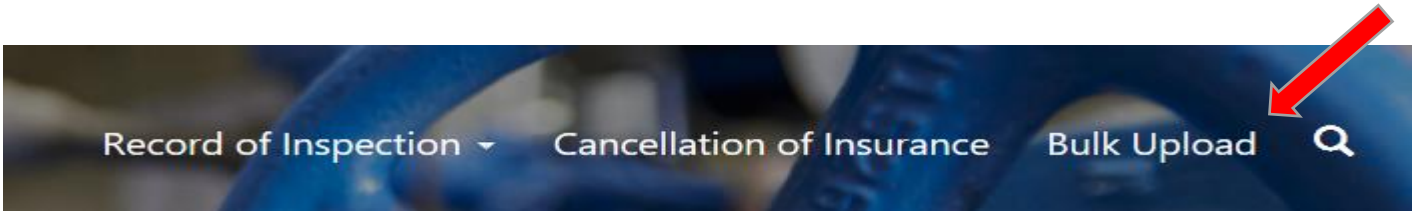
[Update](#)





## 2.1 Submit Record of Inspection (ROI) – Bulk Upload

1. Select the “Bulk Upload” button from the top menu.



The Bulk Upload page is where you can upload either your Record of Inspection or your Cancellation Notifications in Bulk. Links to download both templates are available on this page.

2. Select the File type “Record of Inspection” from the drop-down menu.
3. Select the “Browse” button to add your bulk file for upload. Once your file has been added, select the “Submit” button.

The screenshot displays the 'Bulk Upload' form. At the top, the title 'Bulk Upload' is centered. Below the title are two buttons: 'Record of Inspection Template' and 'Cancellation of Insurance Template'. Underneath these is a section titled 'File Type' which contains a dropdown menu currently set to 'Record of Inspection'. Below the dropdown is a section titled 'Attach a File' with a text input field containing the file path 'C:\Users\jmyrie\Desktop\BPV' and a 'Browse...' button. At the bottom of the form is a blue 'Submit' button.

If the file was submitted successfully you the system will display a confirmation message and send both the Insurer and the Owner a summary notification.



## Bulk Upload Confirmation

# Bulk Upload

Record of Inspection Template
Cancellation of Insurance Template

Submission completed successfully.

4. Select “Record of Inspection” from the “Record of Inspection” top menu to view your submitted records of Inspection.
5. Select the drop arrow, and select the “view” option to view each Record of Inspection.

## Record of Inspection

Validated ▾

Search

Create

Installation Address ↑	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	ROI Submission Date	Certificate Due Date	Validation Status	Work Order	Work Order In Cart	
65000178	JESSICA TEST OWNER	JESSICA'S TEST INSURER	865704	Pass	5/16/2018 10:42 AM		Valid	20157	Yes	▾ View
65000179	JESSICA TEST OWNER	JESSICA'S TEST INSURER	345678	Pass	5/16/2018 10:42 AM		Valid	20158	Yes	▾
65000183	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000087	Pass	5/17/2018 11:45 AM		Valid	20159	Yes	▾

All records have been categorized based on the records status. Applicable statuses are defined below:

ROI Status	Definition
Pending	Record of Inspection submitted and failed system validation.
Submitted	Record of Inspection submitted and passed system validation
Validated	Record of Inspection submitted and validated by the owner
Paid	Record of Inspection submitted, validated, and the Certificate has been paid for by the owner
Rejected	Record of Inspection submitted, and rejected by the system due to an error
Cancelled	Record of Inspection submitted, then cancelled by the Insurer or TSSA



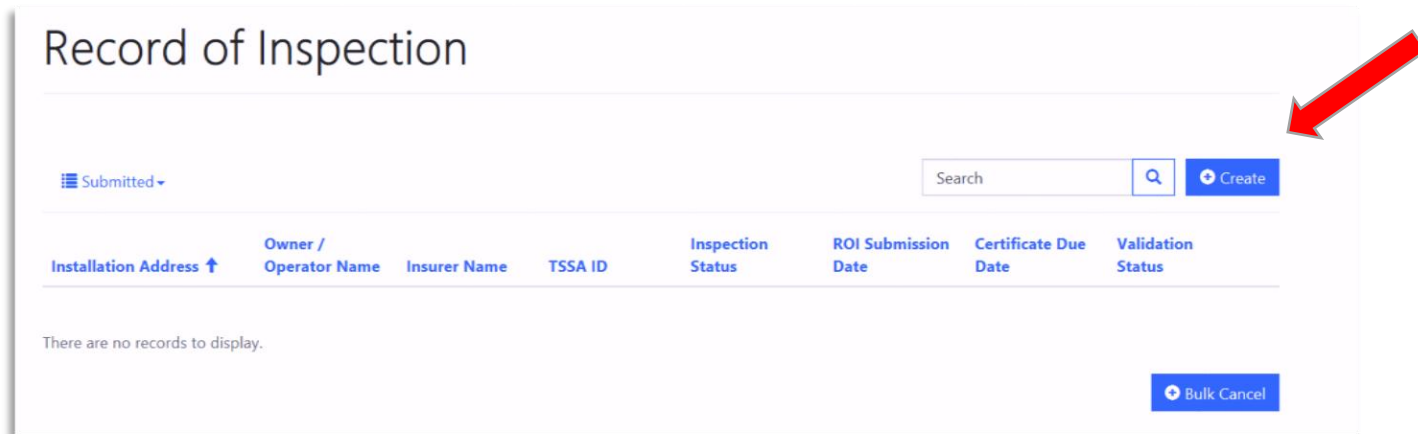
## 2.2 Submit Record of Inspection (ROI) – Populate Electronic Form

If you prefer to fill in a form instead of uploading a batch file, there is an option to fill out a Record of Inspection form in the Portal. This allows a user to submit a single Record of Inspection at a time. The electronic form and bulk file have the same fields and the same requirements apply.

1. Select “Record of Inspection” from the “Record of Inspection” top menu to view populate the form.



2. Select the “Create” button to fill in the Record of Inspection form.



3. Fill in the following fields and select the “Submit” Button
  - Customer Information
  - Inspection Information
  - Equipment Information
4. Select “Record of Inspection” from the “Record of Inspection” top menu to view your submitted records of Inspection.
5. Select the drop arrow, and select the “view” option to view each Record of Inspection.



## Record of Inspection

Validated -

Search



Create

Installation Address	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	RDI Submission Date	Certificate Due Date	Validation Status	Work Order	Work Order In Cart	
65000178	JESSICA TEST OWNER	JESSICA'S TEST INSURER	865704	Pass	5/16/2018 10:42 AM		Valid	20157	Yes	View
65000179	JESSICA TEST OWNER	JESSICA'S TEST INSURER	345678	Pass	5/16/2018 10:42 AM		Valid	20158	Yes	
65000183	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000087	Pass	5/17/2018 11:45 AM		Valid	20159	Yes	

## Record of Inspection Form

Create



### Customer Information

Owner / Operator Name \*

### Inspection Information

Insurer Name \*

Inspector Name \*

Inspection Agency Name

TSSA Issued Inspector Certificate Number (COC) \*

Inspection Date \*





Inspection Type \*

Inspection Status \*

NB Code Violation Category Text

## Equipment Information

TSSA ID \*

Installation Address - Postal Code \*

MAWP (psi) \*

Submit

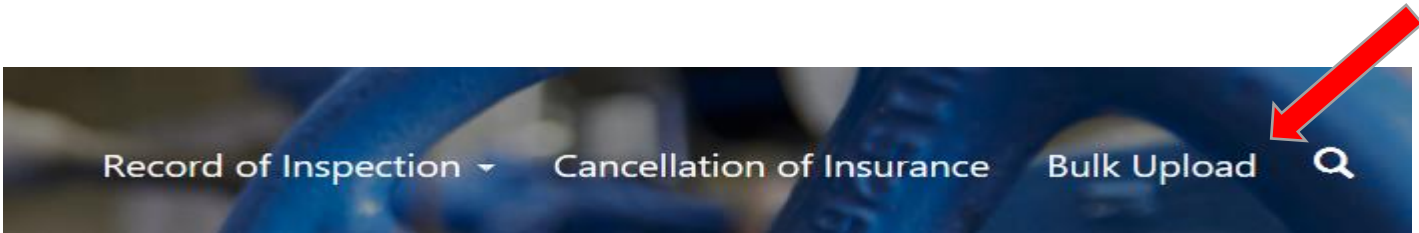




### 3.1 Submit Cancellation of Insurance Notification – Bulk Upload

When an Insurer is no longer providing insurance, or performing inspections on a qualified boiler or pressure vessel they are required to notify the TSSA. In the portal, you will have the option to perform a Bulk Upload to notify the TSSA of each device impacted by the cancellation of insurance. To perform a cancellation bulk upload, follow the steps below:

1. Select the “Bulk Upload” button from the top menu.



**The Bulk Upload page is where you can upload either your Record of Inspection or your Cancellation Notifications in Bulk. Links to download both templates are available on this page.**

4. Select the File type “Cancellation of Insurance” from the drop-down menu.
5. Select the “Browse” button to add your bulk file for upload. Once your file has been added, select the “Submit” button.

The screenshot shows the 'Bulk Upload' form. At the top, the title 'Bulk Upload' is displayed. Below the title are two buttons: 'Record of Inspection Template' and 'Cancellation of Insurance Template'. Underneath is a section titled 'File Type' with a 'File Type \*' label and a dropdown menu currently set to 'Cancellation of Insurance'. Below that is an 'Attach a File \*' section with a text input field containing the file path 'C:\Users\jmyrie\Desktop\BPV' and a 'Browse...' button. At the bottom left of the form is a blue 'Submit' button.



If the file was submitted successfully you the system will display a confirmation message and send both the Insurer and the Owner a summary notification.

### Bulk Upload Confirmation

The screenshot shows a web interface for 'Bulk Upload'. At the top, the title 'Bulk Upload' is displayed in a large, dark font. Below the title, there are two buttons: 'Record of Inspection Template' and 'Cancellation of Insurance Template'. A green horizontal bar at the bottom of the interface contains the text 'Submission completed successfully.'

Bulk Upload

Record of Inspection Template Cancellation of Insurance Template

Submission completed successfully.

4. Select "Cancellation of Insurance" button from the top menu to view your submitted cancellation notification.
5. Select the drop arrow, and select the "View" option to view each record.

The screenshot shows a table titled 'Cancellation of Insurance'. The table has a header with columns: Cancellation Number, Owner / Operator Name, Effective Date of Cancellation, TSSA ID, Installation Address Postal Code, Status Reason, and Created On. There are three rows of data. A search bar and a 'Create' button are located at the top right of the table area. A dropdown menu is open for the first row, showing a 'View Details' option.

Submitted

Search Create

Cancellation Number ↑	Owner / Operator Name	Effective Date of Cancellation	TSSA ID	Installation Address Postal Code	Status Reason	Created On
65000015	JESSICA TEST OWNER	5/11/2018	65000087	L1R 2H4	Submitted	5/23/2018 12:19 AM
65000017	JESSICA TEST OWNER	5/11/2018	65000088	L1R 2H4	Submitted	5/23/2018 12:19 AM
65000019	Jessica Test Owner	5/1/2018	865704	L1R 2H4	Submitted	5/23/2018 11:29 AM

View Details



### 3.2 Cancellation of Insurance Notification – Populate Electronic Form

If you prefer to fill in a form instead of uploading a batch file, there is an option to fill out a Cancellation Notification form in the Portal. This allows a user to submit a single notification at a time. The electronic form and bulk file have the same fields and the same requirements apply.

1. Select the “Cancellation of Insurance” button from the top menu to populate the form.
2. Select the “Create” button to fill in the Cancellation of Insurance form.

The screenshot shows the 'Record of Inspection' interface. At the top left, there is a 'Submitted' filter dropdown. To the right is a search bar with a magnifying glass icon and a blue 'Create' button with a plus icon. Below these is a table header with columns: 'Installation Address' (with an upward arrow), 'Owner / Operator Name', 'Insurer Name', 'TSSA ID', 'Inspection Status', 'ROI Submission Date', 'Certificate Due Date', and 'Validation Status'. Below the header, the text 'There are no records to display.' is shown. In the bottom right corner, there is a blue 'Bulk Cancel' button with a plus icon. A red arrow points to the 'Create' button.

3. Fill in the following fields and select the “Submit” Button
  - Customer Information
  - Equipment Information
4. Select “Cancellation of Insurance” button from the top menu to view your submitted notifications.





**Cancellation of Insurance Form**

Create
✕

### Customer Information

**Owner / Operator Name \***

**Effective Date of Cancellation \***

### Equipment Information

**TSSA ID \***

**Installation Address Postal Code \***

5. Select the drop arrow, and select the “view” option to view each Record of Inspection.

Record of Inspection										
Installation Address	Owner / Operator Name	Insurer Name	TSSA ID	Inspection Status	ROI Submission Date	Certificate Due Date	Validation Status	Work Order	Work Order In Cart	
65000178	JESSICA TEST OWNER	JESSICA'S TEST INSURER	865704	Pass	5/16/2018 10:42 AM		Valid	20157	Yes	View
65000179	JESSICA TEST OWNER	JESSICA'S TEST INSURER	345678	Pass	5/16/2018 10:42 AM		Valid	20158	Yes	View
65000183	JESSICA TEST OWNER	JESSICA'S TEST INSURER	65000087	Pass	5/17/2018 11:45 AM		Valid	20159	Yes	View



# Appendix

## Record of Inspection List of Values

Type of Business	Inspection Type	Inspection Status	Inspection Frequency	NB Violation Category
01 - Power Producers/Utilities	Internal	Pass	1-Year	1.1) Safety Relief Devices Inoperable
02 - Petro/Chemical	External	Conditional Pass	2-Year	1.2) Safety Relief Devices Device Missing - Not Installed
03 - Production Industries			3-Year	1.3) Safety Relief Devices Improper Installation
04 - Manufacturing Industries				1.4) Safety Relief Devices Leaking
05 - Medical				1.5) Safety Relief Devices Incorrect Capacity
06 - Academic				1.6) Safety Relief Devices Missing Nameplate
07 - Food Process				1.7) Safety Relief Devices Incorrect Set Pressure
08 - Public Services				2.1) Low Water Cutoffs / Flow Sensing Devices Inoperable
09 - Commercial				2.2) Low Water Cutoffs / Flow Sensing Devices Device Missing - Not Installed
10 - Residential				2.3) Low Water Cutoffs / Flow Sensing Devices Improper Installation
11 - Agriculture				2.4) Low Water Cutoffs / Flow Sensing Devices No Manual Reset
				2.5) Low Water Cutoffs / Flow Sensing Devices Sediment / Dirty / Leaking
				3.1) Pressure Controls Inoperable
				3.2) Pressure Controls Device Missing - Not Installed
				3.3) Pressure Controls Improper Installation
				3.4) Pressure Controls No Manual Reset
				4.1) Temperature Controls - Operator or High Limit Inoperable
				4.2) Temperature Controls - Operator or High Limit Device Missing - Not Installed
				4.3) Temperature Controls - Operator or High Limit Improper Installation
				4.4) Temperature Controls - Operator or High Limit No Manual Reset
				5.1) Burner Management Flame Failure – Operating, Management System
				5.2) Burner Management Electrical Power Disconnect – Missing / Not Functioning
				5.3) Burner Management Improper Installation
				5.4) Burner Management Fuel Leaks
				5.5) Burner Management Emergency Shut Down Switch– Missing / Not Functioning
				5.6) Burner Management Fuel Train Damaged
				5.7) Burner Management Flame Impingement
				5.8) Burner Management Improper Combustion Air
				6.1) Level Indicators - Gage Glasses, Bulls Eyes and Fiber Opticals Inoperable
				6.2) Level Indicators - Gage Glasses, Bulls Eyes and Fiber Opticals Device Missing - Not Installed
				6.3) Level Indicators - Gage Glasses, Bulls Eyes and Fiber Opticals Improper Installation
				6.4) Level Indicators - Gage Glasses, Bulls Eyes and Fiber Opticals Leaking
				6.5) Level Indicators - Gage Glasses, Bulls Eyes and Fiber Opticals Internal Deposits
				7.1) Pressure / Temperature Indicators Damaged - Inoperable
				7.2) Pressure / Temperature Indicators Device Missing - Not Installed
				7.3) Pressure / Temperature Indicators Improper Installation
				7.4) Pressure / Temperature Indicators Leaking
				7.5) Pressure / Temperature Indicators Improper Size / Range
				8.1) Pressure - Retaining Items (PRI) Misc Inoperable
				8.2) Pressure - Retaining Items (PRI) Misc Item Missing – Not Installed
				8.3) Pressure - Retaining Items (PRI) Misc Improper Installation
				8.4) Pressure - Retaining Items (PRI) Misc Item Leaking
				8.5) Pressure - Retaining Items (PRI) Misc Improper Repair / Alteration
				8.6) Pressure - Retaining Items (PRI) Misc Materials Deficiencies
				8.7) Pressure - Retaining Items (PRI) Misc Required documentation, nameplate-missing or damaged
				8.8) Pressure - Retaining Items (PRI) Misc Non-ASME Code Construction
				8.9) Pressure - Retaining Items (PRI) Misc Inspection Certificate-missing or expired
				8.10) Pressure - Retaining Items (PRI) Misc Testing required