



CRM
Version 0.1



Technical Standards and Safety Authority

Owner/Operator Portal Training Documentation





Owner Portal Training Document

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Overview

This training document will help users navigate through the Owner Portal App and complete functionalities such as: Validating ROIs, paying for certificates of Inspections, and submitting cancellations of insurers.

Prerequisites:

- User has redeemed their code and completed their portal registration form.



Step-by-step Instructions

Step

Task

Signing into Portal

1. Open the link to the Owner Portal App: "<https://ownerseservices.tssa.org>"

2. Click on the Sign- in button.



Welcome to TSSA BPV COI Portal

Click on Sign In Button to initiate services.



3. Click the “**Sign up now**” hyperlink.

Sign in

Sign in with your email address

Email Address

Password

[Forgot your password?](#)

Sign in

Don't have an account? [Sign up now](#)

4. Enter the “Email Address” you want to use to register yourself and click the "Send Verification Code" button. You will receive a notification.

< Cancel

User Details

davidsmithtssa@gmail.com *

Send verification code

New Password *

Confirm New Password *

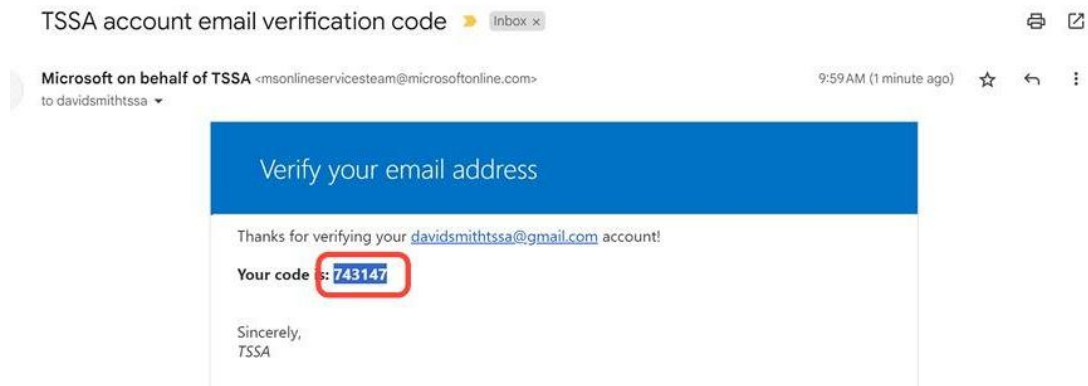
Given Name *

Surname *

Create



5. Check your email for the verification code and copy it.





6. Enter or paste the "**Verification Code**" and click the "**Verify Code**" button. A new screen will appear to help you continue with the registration process.

< Cancel



User Details

Verification code has been sent to your inbox. Please copy it to the input box below.

 * *



7. Complete the following fields by entering a password and given names. All fields with an asterisk (*) are mandatory. Click the "Create" button when you're done.

New Password	*
Confirm New Password	*
Given Name	*
Surname	*

Create

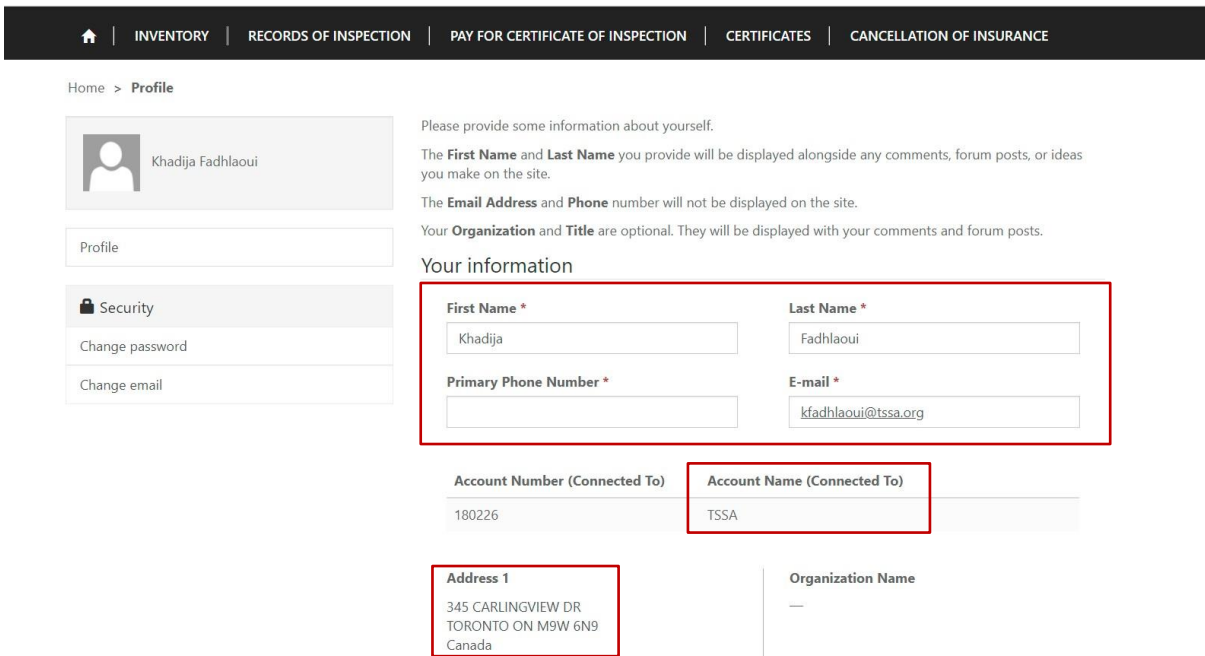


Profile Page

8. Select the Profile option from your Username Menu in the top right corner.



9. To ensure TSSA has the correct information review your profile page and validate the following contact details.
 - Name, Phone, and Email address fields are editable. Changes to these fields will automatically update the TSSA database.*






Home Page

The home page will be displayed to users when clicking on the “Home” tab located at the top menu bar.

- > The home page displays quick links to other pages on the portal



 TSSA BPV Portal


HARRY POTTER
[Profile](#) [Sign out](#)


[Home](#) | [INVENTORY](#) | [RECORDS OF INSPECTION](#) | [PAY FOR CERTIFICATE OF INSPECTION](#) | [CERTIFICATES](#)


Welcome, Hogwarts O/A School of Magic


3 Anderson Blvd
Uxbridge ON L4A 7X4
Canada

Email: hogwarts@tssa.org
Phone: 4167343536


Inventory


Records of Inspection


Pay for Certificate(s) of Inspection


Cancellation of Insurer

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Inventory Page

10. The inventory page displays a list of Inventories that the portal user is associated with in the TSSA Database.

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

INVENTORY | RECORDS OF INSPECTION | PAY FOR CERTIFICATE OF INSPECTION | CERTIFICATES

Home > Inventory

Search [] [Download]

TSSA Inventory #	Account	Account Site	Site	Asset Class	Status	CRN Number	Equipment Tag	OIN	National Board Number	Serial Number
10000060	Hogwarts O/A School of Magic	Slytherin House	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	Fitting	Draft	01199.25ADD				
1386590	Hogwarts O/A School of Magic	Gryffindor House	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	Boiler	Active (Insured)	H7268.5				51129101

Searching for Inventories

Use the quick search bar at the top right side to find inventories.

- The Asterisk symbol (*) is used as a wild card in the Portal app. Use this to maximize your search in the database.

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

INVENTORY | RECORDS OF INSPECTION | PAY FOR CERTIFICATE OF INSPECTION | CERTIFICATES

Home > Inventory

Search [13865*] [Download]

TSSA Inventory #	Account	Account Site	Site	Asset Class	Status	CRN Number	Equipment Tag	OIN	National Board Number	Serial Number
1386590	Hogwarts O/A School of Magic	Gryffindor House	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	Boiler	Active (Insured)	H7268.5				51129101



Downloading List of Inventories

- To view a full list of your inventories, click on the Download button located on the far right side of the screen.
 - System will download an Excel list of inventories.
 - Users can use the Excel file to filter by site or owner/operator name

12.

TSSA BPV Portal | Amitesh Solanki | Profile | Sign out

Home | **INVENTORY** | RECORDS OF INSPECTION | UPLOAD ROI | FAILED INSPECTIONS | CANCELLATION OF INSURANCE

Home > Inventory

Search [] [Download]

Inventory Number ↑	Owner/Operator	Account Site	Site	Asset Class	Status	CRN Number	Equipment Tag	OIN	National Board Number	Serial Number
174598		CENTRAL UTILITIES PLANT	65 LANG WAY, GUELPH, ON, N1G 2W1, Canada	Boiler	Active (Uninsured)	D173.5	4	5.109705		62820

View Details of Inventory

- Click on the inventory Number (TSSA UID) to see additional technical information on the device.
 - Portal will direct the user to the detail information page

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

Home | **INVENTORY** | RECORDS OF INSPECTION | PAY FOR CERTIFICATE OF INSPECTION | CERTIFICATES

Home > Inventory

Search [] [Download]

TSSA Inventory # ↑	Account	Account Site	Site	Asset Class	Status	CRN Number	Equipment Tag	OIN	National Board Number	Serial Number
100000060	Hogwarts O/A School of Magic	Slytherin House	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	Fitting	Draft	01199.25ADD				
1386590	Hogwarts O/A School of Magic	Gryffindor House	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	Boiler	Active (Insured)	H7268.5				51129101



14. Review details of Inventory.

Summary	
GENERAL	Serial Number
TSSA ID 1386590	51129101
Owner/ Operator * Hogwarts O/A School of Magic	Manufacturer's Name WEIL-MCLAIN (A MARLEY COMPANY)
CRN Number H7268.5	
Installation Address 6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	
Equipment Tag Number —	
Device Type * Boiler	
Inspection Cycle Months 24 Months	
Date of Last Inspection 10/8/2019	



Records of Inspection Page

- To view records of inspections submitted click on the Records of Inspection tab.
 - System will display records in “submitted by insurer” status on the default page

ROI Number	Inventory Number	Equipment Type	Account Name (Owner/Operator)	Site Address	Rol Status	ROI Submission Date
53076	6466			84 SMELTER RD, CONISTON, ON, P0M 1M0, Canada	Submitted by Insurer	2/24/2021 1:54 PM
50670	4507			250 LAURIER BLVD, BROCKVILLE, ON, K6V 5V7, Canada	Submitted by Insurer	2/24/2021 1:54 PM
42243	179:			3 UNIROVAL RD, PO BOX 430, LINDSAY, ON, K9V 4S5, Canada	Submitted by Insurer	2/24/2021 1:54 PM

Searching Records of Inspections

- Use the quick search bar at the top right side to find ROI's.
 - The Asterisk symbol (*) is used as a wild card in the Portal app. Use this to maximize your search in the database.

ROI Number	Inventory Number	Equipment Type	Account Name (Owner/Operator)	Site Address	Rol Status	ROI Submission Date
53076	646672			84 SMELTER RD, CONISTON, ON, P0M 1M0, Canada	Submitted by Insurer	2/24/2021 1:54 PM



View Records of inspection in different statuses

17. To view different statuses of ROI, click on the drop-down arrow next to Submitted by Insurer and select the value from the list of values.

ROI Number	Inventory Number	Equipment Type	Account Name (Owner/Operator)	Site Address	ROI Status	ROI Submission Date
				84 SMELTER RD, CONISTON, ON, POM 1M0, Canada	Submitted by Insurer	2/24/2021 1:54 PM

Validate Records of Inspection

Under Submitted by Insurer view, click on the ROI number to open the record.

ROI Number	Inventory Number	Equipment Type	SYSTEM OWNER	Site Address	ROI STATUS	ROI Submission Date
ROI-1008	65095524		Hogwarts O/A School of Magic	319 SHERMAN AVE N, HAMILTON, ON, L8L 6N2, Canada	Submitted by Insurer	2/18/2021 6:45 PM



18. Review the details of the ROI

Home > Record of Inspection

[Approve ROI](#) [Reject ROI](#)

Record of Inspection

ROI Number

ROI-1008

ROI Status *

Submitted by Insurer

ROI Submission Date

2/18/2021 6:45 PM

Date of Validation

—

Authorization

—

Customer Information

ROI Submitter

Hogsmeade Insurance A Div Of All-wizarding Insurance

Owner/Operator

Hogwarts O/A School of Magic

Contact Name

harry potter

Contact Phone Number

—

Contact Email Address

hpotter@tssa.org

Inspection Information

Insurer : *

Hogsmeade Insurance A Div Of All-wizarding Insurance

Inspector Name

ISHTIAQ A TARAR

Inspection Type *

External

ROI Inspection Status

Pass

Inspection Agency

850400 ONTARIO LIMITED O/A GTT ONSET

TSSA Issued Inspector Certificate Number (CoC)

000266480

Inspection Date *

2/9/2021

Inventory Information

TSSA ID *

65095524

Asset Class *

Pressure Vessel

CRN Number

L4988.5

Serial Number

4014

OIN

—



- 19. Click on the Approve ROI button located at the top of the form, if the information displayed on the form is correct.
 - > System will auto-update the status of the ROI to Validated and move the record to Validated view.
 - > Within Minutes the system will move the Validated record to Pending Payment View and will automatically move to the Pay for Certificate of Inspection page

Home > Record of Inspection



Record of Inspection

ROI Number

ROI-1008

20. Rejecting Records of Inspection

- 21. Click on the ROI Number displayed under Submitted by Insurer view
 - > System will open the ROI record

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

INVENTORY | RECORDS OF INSPECTION | PAY FOR CERTIFICATE OF INSPECTION | CERTIFICATES

Home > Records of Inspection

ROI(s) - Submitted by Insurer

ROI Number	Inventory Number	Equipment Type	SYSTEM OWNER	Site Address	ROI STATUS ↑	ROI Submission Date
ROI-1008	65095524		Hogwarts O/A School of Magic	319 SHERMAN AVE N, HAMILTON, ON, L8L 6N2, Canada	Submitted by Insurer	2/18/2021 6:45 PM

- 22. Review the information displayed on the record. Click on the Reject ROI button located at the top of the form.
 - > System will trigger the Rejection Reason Form (screen below)

Home > Record of Inspection



Record of Inspection

ROI Number

ROI-1008

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

INVENTORY | RECORDS OF INSPECTION | PAY FOR CERTIFICATE OF INSPECTION | CERTIFICATES | CANCELLATION OF INSURER

Home > Records of inspection for Reject

ROI Number: ROI-1073

Reason for Rejection: [Dropdown menu]

Comments *

[Text area for comments]

Submit



23. Complete the Fields on Form



Home > Records of inspection for Reject

ROI Number
ROI-1073

Reason for Rejection

Comments *

Submit

24. Click on the Submit button when fields are completed.
> System will automatically update the status on the Record

Home > Records of inspection for Reject

ROI Number
ROI-1078

Reason for Rejection
Incorrect Inspection Information

Comments *

Submit

25. Click on the ROI view and select "ROI(s) – Rejected". The system will display the record in this view

Home > Records of Inspection

ROI(s) - Rejected

Search

ROI Number	Inventory Number	Equipment Type	SYSTEM OWNER	Site Address	ROI STATUS ↑	ROI Submission Date
ROI-1078	17475793		Hogwarts O/A School of Magic	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	Rejected	3/10/2021 9:32 PM



Pay for Certificate of Inspection

26. Click on the Pay for Certificate of Inspection tab on the menu bar

The screenshot shows the TSSA BPV Portal interface. The navigation menu at the top includes: INVENTORY, RECORDS OF INSPECTION, **PAY FOR CERTIFICATE OF INSPECTION** (highlighted with a red box), CERTIFICATES, and CANCELLATION OF INSURER. The user is identified as HARRY POTTER with options for Profile and Sign out. Below the menu, there is a breadcrumb trail: Home > Checkout. A table header is visible with columns: Inventory #, Site, ROI Number (with an upward arrow), Inspection Frequency, Amount Owing, Pay Now, and a Next button.

27. The system displays records that are pending Payment

The screenshot shows the TSSA BPV Portal interface with the 'PAY FOR CERTIFICATE OF INSPECTION' tab selected. The table displays two records:

Inventory #	Site	ROI Number	Inspection Frequency	Amount Owing	Pay Now
17469893	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	ROI-1079	24 Months	\$80.00	<input type="checkbox"/>
17467935	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	ROI-1080	24 Months	\$80.00	<input type="checkbox"/>

28. To add Checkout items, click on the drop-down arrow and select "check"

The screenshot shows the TSSA BPV Portal interface with the 'PAY FOR CERTIFICATE OF INSPECTION' tab selected. The table displays two records, and the 'Pay Now' column for the first record is expanded to show a dropdown menu with 'Check' and 'Uncheck' options. The 'Check' option is selected.

Inventory #	Site	ROI Number	Inspection Frequency	Amount Owing	Pay Now
17469893	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	ROI-1079	24 Months	\$80.00	Selected
17467935	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	ROI-1080	24 Months	\$80.00	Selected





28. The system will add the value "Selected" under the Pay Now column.

Home > Checkout

Inventory #	Site	ROI Number	Inspection Frequency	Amount Owing	Pay Now	Next
17469893	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	ROI-1079	24 Months	\$80.00		
17467935	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	ROI-1080	24 Months	\$80.00	Selected	

29. Click on Next button to pay for the items selected.
> System will move to Payment Details Page

Home > Checkout

Inventory #	Site	ROI Number	Inspection Frequency	Amount Owing	Pay Now	Next
17469893	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	ROI-1079	24 Months	\$80.00		
17467935	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	ROI-1080	24 Months	\$80.00	Selected	

30. Select Payment Type by clicking on the drop-down arrow displayed on the field

Home > Checkout > Pay for Certificate of Insurance

Payment Details

Payment Type *

- Pay with credit card
- Pay with invoice

Next



Pay with a Credit Card

31. Select Pay with Credit Card as the Payment Type
- All records selected to be paid by Credit Card must be paid by 10 pm that evening. Otherwise, the payment type will automatically default to the invoice option.

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

INVENTORY | RECORDS OF INSPECTION | PAY FOR CERTIFICATE OF INSPECTION | CERTIFICATES | CANCELLATION OF INSURER

Home > Checkout > Pay for Certificate of Insurance

Payment Details

Payment Type *
Pay with credit card

Next

32. Click on the "Next" button.
- > System will display record(s) selected with the Amount Owing

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

INVENTORY | RECORDS OF INSPECTION | PAY FOR CERTIFICATE OF INSPECTION | CERTIFICATES | CANCELLATION OF INSURER

Home > Checkout > Pay for Certificate of Insurance

Payment Details

Payment Type *
Pay with credit card

Next

33. Review records displayed and the total amount owing. Click on the Continue to Payment button to proceed to the next page.

17467935	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada	ROI-1080	24 Months	\$80.00
----------	--	----------	-----------	---------

Total Paid
\$ 80.00

Continue to Payment



34. Validate system displays the correct Amount to Pay and click on the green button "click to proceed to Secure Page."
- > System will direct users to the Moneris Credit Card Payment page

TSSA BPV Portal

Profile Sign out

INVENTORY | RECORDS OF INSPECTION | PAY FOR CERTIFICATE OF INSPECTION | CERTIFICATES | CANCELLATION OF INSURANCE

Amount to Pay: 80

ROI Payment Id : ROIP-1026

Click to proceed to Secure Page

35. Enter your credit card information and click on the Process Transaction button.
- > System will process payment and direct the user to their confirmation page

kevin - QA Store

Mandatory fields marked by *

Payment Details

Transaction Amount: \$ 80.00 (CAD)

Order ID: ROIP-1028

Please complete the following details exactly as they appear on your card.
Do not put spaces or hyphens in the card number.

Cardholder Name*:

Card Number*:

Expiry Date (MMYY)*:

Click 'Process Transaction' to charge your card. Only click the button once. Using the 'Back', 'Refresh' or 'Cancel' button after you press the 'Process Transaction' button will not stop the transaction from being processed and may result in a double charge.

Process Transaction Cancel Transaction



- 36. The system will display Payment Confirmation. You may save/print this page for reference.
 - > System will automatically update the ROI status to Paid

Key	Value
response_order_id	ROIP-1026
date_stamp	2021-03-10
time_stamp	22%3A12%3A05
bank_transaction_id	660188540
charge_total	80.00
bank_approval_code	7170
response_code	027
iso_code	01
message	APPROVED*****%3D
trans_name	purchase
cardholder	4242424242
f4i4	4242***4242
card	V

Pay with Invoice

- 38. Select Payment Type "Pay with Invoice"
 - > System will auto-display the Invoice payment Details field

Home > Checkout > Pay for Certificate of Insurance

Payment Details

Payment Type *
Pay with invoice

Invoice Payment Details

Invoice Consolidation
 Create one invoice for all records
 Invoice each of these records separately

Purchase order number

TSSA does not accept Purchase Orders for Certifications, as a courtesy we will print the Purchase order number on Invoice only.

Next

- 39. Select an option under Invoice Payment Details



Home > Checkout > Pay for Certificate of Insurance

Payment Details

Payment Type *

Pay with invoice

Invoice Payment Details

Invoice Consolidation

Create one invoice for all records

Invoice each of these records separately

Purchase order number

TSSA does not accept Purchase Orders for Certifications, as a courtesy we will print the Purchase order number on Invoice only.

Next

40. If applicable, enter a Purchase Order Number
- TSSA does not accept Purchase Orders for Certificates. This option is a courtesy that will be printed on invoices only.

Home > Checkout > Pay for Certificate of Insurance

Payment Details

Payment Type *

Pay with invoice

Invoice Payment Details

Invoice Consolidation

Create one invoice for all records

Invoice each of these records separately

Purchase order number

TSSA does not accept Purchase Orders for Certifications, as a courtesy we will print the Purchase order number on Invoice only.

Next

41. Click on the Next button, at the bottom of the form.





42. The validation system displays the Record(s) selected and the Total amount displayed.

Click on the Generate Invoice button.

43.

Home > Checkout > Pay for Certificate of Insurance

ROI(s) selected to Pay

Inventory Number (TSSA ID)	Site (TSSA ID)	ROI Number ↑	Inspection Cycle (TSSA ID)	Amount Owing
17469893	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	ROI-1079	24 Months	\$80.00

Total Paid
\$ 80.00

Generate Invoice

44. Confirmation Notice will be displayed.

- Note it will take 3-5 business days to receive your invoice. Certificate of Inspection will be available in Portal once payment is processed.

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

Home > Checkout > Pay for Certificate of Insurance

Thank you for completing the Invoice Payment Option. Please allow 3-5 business to receive your invoice. Certificate of Inspection will be available in portal when payment is processed.

Certificates

45. Click on the Certificates tab located on the menu bar

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

Home > Certificates

Inventory | RECORDS OF INSPECTION | PAY FOR CERTIFICATE OF INSPECTION | **CERTIFICATES** | CANCELLATION OF INSURER

Search

Authorization Number ↑ | Account | Inventory | Start Date | Expiry Date ↑ | Site



46. The system displays the list of all paid Certificates associated with the User

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

Home > Certificates

Authorization Number ↑	Account	Inventory	Start Date	Expiry Date ↑	Site
000309766	Hogwarts O/A School of Magic	65000765	2/26/2021	3/29/2021	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada
COI1000000	Hogwarts O/A School of Magic	17463462	2/18/2021	2/18/2022	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada
COI1000002	Hogwarts O/A School of Magic	17475793	2/18/2021	2/18/2022	#2 HOT MILL FINISHING MILL OIL CELLAR, GATE 15 DOOR 1010, HAMILTON, ON, L5N 3J5, Canada
COI1000003	Hogwarts O/A School of Magic	65095525	2/18/2021	2/18/2022	6 ADAMS ST, PARIS, ON, N3L 3X4, Canada
COI1000005	Hogwarts O/A School of Magic	17467935	2/19/2021	2/19/2022	1266 MCDUGALL ST, WINDSOR, ON, N8X 3M7, Canada

47. Click on the Authorization Number
> System will redirect user to Certificate detail page

TSSA BPV Portal | HARRY POTTER | Profile | Sign out

Home > Certificates

Authorization Number ↑	Account	Inventory	Start Date	Expiry Date ↑	Site
000309766	Hogwarts O/A School of Magic	65000765	2/26/2021	3/29/2021	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada
COI1000000	Hogwarts O/A School of Magic	17463462	2/18/2021	2/18/2022	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada



48. System displays details of the Certificate. The PDF copy of the COI is located at the bottom of the page.

Home > Certificates details for Print-Owner

General

Name *	
COI1000000 - Hogwarts O/A School of Magic - Authorization - Certificate of Inspection	
Account *	Authorization Number
Hogwarts O/A School of Magic	COI1000000
Version	Legacy Authorization Number
—	—
Start Date	Issue Date
2/18/2021	2/19/2021
Expiry Date	Termination Date
2/18/2022	—
Site	Inventory
8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	17463462
OE Plant	Asset Class *
—	Boiler
	CRN Number
	5811.65

Certificate

Name ↑	Modified
Cert_of_Inspection-COI1000000.pdf (108 KB)	20 days ago

49. To download a copy, click on the Certificate link
> System will download a pdf copy to the computer

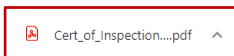
Certificate

Name ↑	Modified
Cert_of_Inspection-COI1000000.pdf (108 KB)	20 days ago

50. Click on the downloaded file to open the Certificate

Certificate

Name ↑	Modified
Cert_of_Inspection-COI1000000.pdf (108 KB)	20 days ago





Cancellation of Insurer

51. Click on the Cancellation of Insurer tab located on the top menu bar.

The screenshot shows the TSSA BPV Portal interface. The top navigation bar includes the TSSA logo, the text 'TSSA BPV Portal', and the user name 'HARRY POTTER' with 'Profile' and 'Sign out' links. The navigation menu contains: INVENTORY, RECORDS OF INSPECTION, PAY FOR CERTIFICATE OF INSPECTION, CERTIFICATES, and CANCELLATION OF INSURER (highlighted with a red box). Below the navigation bar, the breadcrumb 'Home > Cancellation of Insurer' is visible. A search bar and two buttons, 'Cancel Insurance' and 'Change Insurer', are present. A table header is shown with columns: Cancellation/Update # ↑, Inventory, Effective Date of Cancellation, Owner/Operator Name, Previous Insurer Name, New Insurer Name, and Created On.

Cancel Insurance

52. Click on Cancel Insurance button if you permit TSSA to complete the Periodic Inspection of the Inventory.
> System will launch the form

This screenshot is similar to the previous one, but the 'Cancel Insurance' button in the top navigation bar is highlighted with a red box. The rest of the interface, including the breadcrumb and table header, remains the same.

53. Click on the magnifying glass located in the inventory field.
> System will display a window with a list of inventories that are associated with the user

The screenshot shows a form titled 'Equipment Information'. It contains a search field labeled 'Inventory *' with a magnifying glass icon to its right, which is highlighted with a red box.



54. Use the search bar to find the inventory in our database.
> The system will display a checkmark next to the selected Inventory.
Click on the Select button located at the bottom of the window

Inventory Number	Status Reason Code	Account	Site	Program	Asset Class	Asset Ty
<input checked="" type="checkbox"/>	100000060	Draft	Hogwarts O/A School of Magic	8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada	Boilers and Pressure Vessels	Fitting - Conventi
<input type="checkbox"/>	1386590	Active (Insured)	Hogwarts O/A	6 ADAMS ST, PARIS,	Boilers and	Boiler

55. The system auto-displays Site Address and Owner/Operator of the device.

Equipment Information

Inventory *

100000060

Site

8 ALFRED ST, COLBORNE, ON, K0K 1S0, Canada

Customer Information

Owner/Operator Name *

Hogwarts O/A School of Magic

56. Complete the Effective Date of Cancellation Field.

Effective Date of Cancellation *

3/3/2021

57. Click on the Magnifying Glass located on Previous Insurer Name field

Insurer Information

Previous Insurer Name



- 58. Use the search bar to find the insurer's name in our database.
 - > The system will display a checkmark next to the selected Inventory.
 Click on the Select button located at the bottom of the window

Lookup records

Search

Account Name ↑

- 850400 ONTARIO LIMITED O/A GTT ONSET
- ALLIANZ GLOBAL RISKS US INSURANCE COMPANY
- ANCHOR RISK SOLUTIONS CORPORATION
- ARISE INCORPORATED
- AVIVA CANADA INC
- B&M RISK ADVICE INC
- CHUBB INSURANCE COMPANY OF CANADA
- FACTORY MUTUAL INSURANCE COMPANY

< 1 2 >

- 59. Click on the Submit button located on the form

Insurer Information

Previous Insurer Name

ANCHOR RISK SOLUTIONS CORPORATION

- 60. The system will display the submitted record on the Cancellation of Insurer Page.

TSSA BPV Portal HARRY POTTER

|
 |
 |
 |
 |

Home > Cancellation of Insurer

Change of insurance - Submitted -

Search

Cancellation/Update # ↑	Inventory	Effective Date of Cancellation	Owner/Operator Name	Previous Insurer Name	New Insurer Name	Created On
CAN-1010	17467935	3/10/2021	Hogwarts O/A School of Magic	ANCHOR RISK SOLUTIONS CORPORATION		3/10/2021 11:21 PM



Change Insurer

61. Click on Change Insurer button when you want to notify TSSA of an Insurer that will be completing your Periodic Inspections

The screenshot shows the TSSA BPV Portal interface. At the top left is the TSSA logo and 'TSSA BPV Portal'. At the top right, the user 'HARRY POTTER' is logged in with 'Profile' and 'Sign out' links. A navigation bar contains: INVENTORY, RECORDS OF INSPECTION, PAY FOR CERTIFICATE OF INSPECTION, CERTIFICATES, and CANCELLATION OF INSURER. Below the navigation bar, the breadcrumb is 'Home > Cancellation of Insurer'. A search bar is present, followed by 'Cancel Insurance' and 'Change Insurer' buttons, with the latter highlighted by a red box. Below this is a table with columns: Cancellation/Update # ↑, Inventory, Effective Date of Cancellation, Owner/Operator Name, Previous Insurer Name, New Insurer Name, and Created On.

62. Click on the magnifying glass located in the inventory field.
 - > System will display a window with a list of inventories that are associated with the user

The screenshot shows the 'Equipment Information' form. It has three main sections: 'Equipment Information', 'Customer Information', and 'Insurer Information'. The 'Equipment Information' section has a required field 'Inventory *' with a magnifying glass icon highlighted by a red box. The 'Customer Information' section has 'Owner/Operator Name *' (filled with 'Hogwarts O/A School of Magic') and 'Effective Date of Cancellation *'. The 'Insurer Information' section has 'Previous Insurer Name' and 'New Insurer Name *', both with magnifying glass icons. A 'Submit' button is at the bottom.



63. Use the search bar to find the inventory in our data base.
> System will display a checkmark next to the selected Inventory
Click on the Select button located at the bottom of the window

ID	Status	Name	Address	Equipment
17464838	Active Pending Insurer Information	Hogwarts O/A School of Magic	8 ALFRED ST, COLBORNE ON, K0K 1S0, Canada	Boilers and Pressure Vessels
1746536	Active (Uninsured)	Hogwarts O/A School of Magic	8 ALFRED ST, COLBORNE ON, K0K 1S0, Canada	Boilers and Pressure Vessels

64. The system auto-populates the Site Address and Owner/Operator of the device.

Equipment Information

Inventory *
1746536

Site
8 ALFRED ST, COLBORNE, ON, K0K 150, Canada

Customer Information

Owner/Operator Name *
Hogwarts O/A School of Magic

65. Complete the Effective date of Cancellation Field

Customer Information

Owner/Operator Name *
Hogwarts O/A School of Magic

Effective Date of Cancellation *

Insurer Information

Previous Insurer Name

New Insurer Name *

Submit

66. Click on the magnifying glass icon next to the Previous Insurer Name
> System will launch the lookup records of the Insurer listed in the TSSA database

Insurer Information

Previous Insurer Name

New Insurer Name *



- 67. Use the search bar to find the insurer's name in our database.
 - > The system will display a checkmark next to the selected Inventory.
 - > Click on the Select button located at the bottom of the window

- 68. Click on the magnifying glass located in the New Insurer Name field.
 - > System will launch the lookup records of the Insurer listed in the TSSA database

- 69. Use the search bar to find the insurer's name in our database.
 - > System will display a checkmark next to the selected Inventory
- Click on the Select button located at the bottom of the window

- 70. Click on the Submit button

- 71. The system will display the submitted record on the Cancellation of Insurer Page



CRM
Version 0.1



TSSA BPV Portal HARRY POTTER
[Profile](#) [Sign out](#)

[Home](#) | [INVENTORY](#) | [RECORDS OF INSPECTION](#) | [PAY FOR CERTIFICATE OF INSPECTION](#) | [CERTIFICATES](#) | [CANCELLATION OF INSURER](#)

Home > Cancellation of Insurer

Change of insurance - Submitted - [Cancel Insurance](#) [Change Insurer](#)

Cancellation/Update # ↑	Inventory	Effective Date of Cancellation	Owner/Operator Name	Previous Insurer Name	New Insurer Name	Created On
CAN-1010	17467935	3/10/2021	Hogwarts O/A School of Magic	ANCHOR RISK SOLUTIONS CORPORATION		3/10/2021 11:21 PM
CAN-1011	17466536	3/10/2021	Hogwarts O/A School of Magic	AVIVA CANADA INC	CHUBB INSURANCE COMPANY OF CANADA	3/10/2021 11:43 PM



Appendix

ROI Status	Definition
Submitted by Insurer	Records of Inspections submitted by Insurer and pending validation from Owners/Operators
Validated	Records of Inspection submitted and validated by Owner/Operators
Pending Payment	Records of Inspections Validated by Owner/Operators and pending Payment for COI's
Paid	Records of Inspection validated, and the Certificate has been paid for by the owner
Rejected	Records of Inspection Submitted by Insurer and Owner/Operator has rejected the ROI due to Incorrect Information.

Frequently Asked Questions (FAQ)

- Q. I didn't receive an email to register for the Portal.**

A. Please send an email to bpv_inquiries@tssa.org or call 416.734.3400.
- Q. My list of inventories is missing devices.**

A. Please send an email to bpv_inquiries@tssa.org
- Q. The inventory details information presented in the portal is not correct, who can I contact?**

A. Please contact our BPV technical team at bpvcustomerservice@tssa.org