CRM

Version 0.1

Technical Standards and Safety Authority

Insurer Portal Training Documentation

Insurer Portal Training Document

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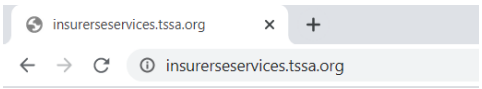
Overview

This training document will help users navigate through the Insurer Portal App, and complete functionalities such as: Uploading ROI's, Failed Inspections form and cancellation of Insurer.

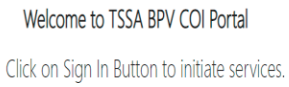
Prerequisites:

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

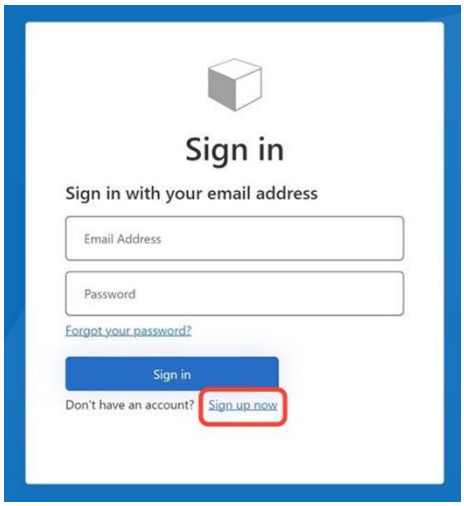
Step-by-step Instructions

Step	Task	Screen
	Signing into Portal	
1.	Open link to Insurer Portal App: "https://insurerseservices.tssa.org"	

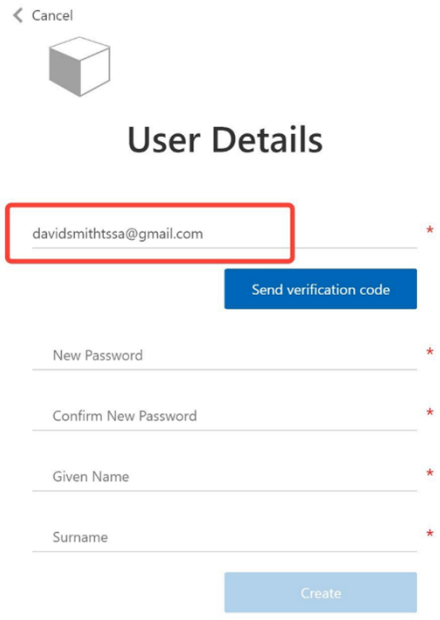
2. Click on Sign In button



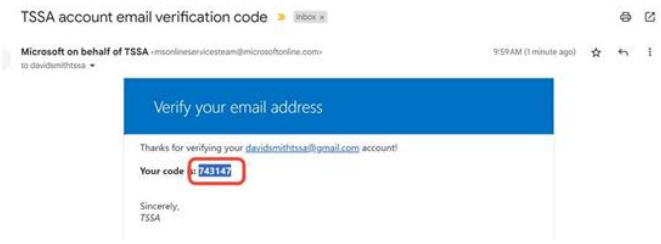
3. Click the “**Sign up now**” hyperlink



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

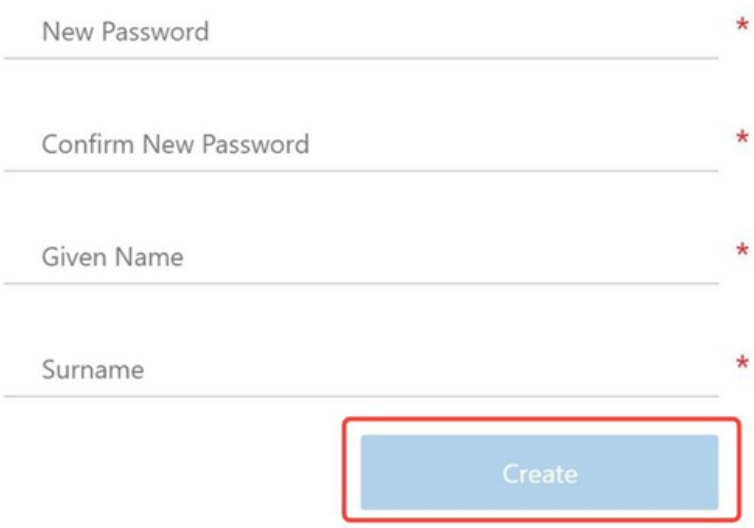


5. Check your email for the verification code and copy it.



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.

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.

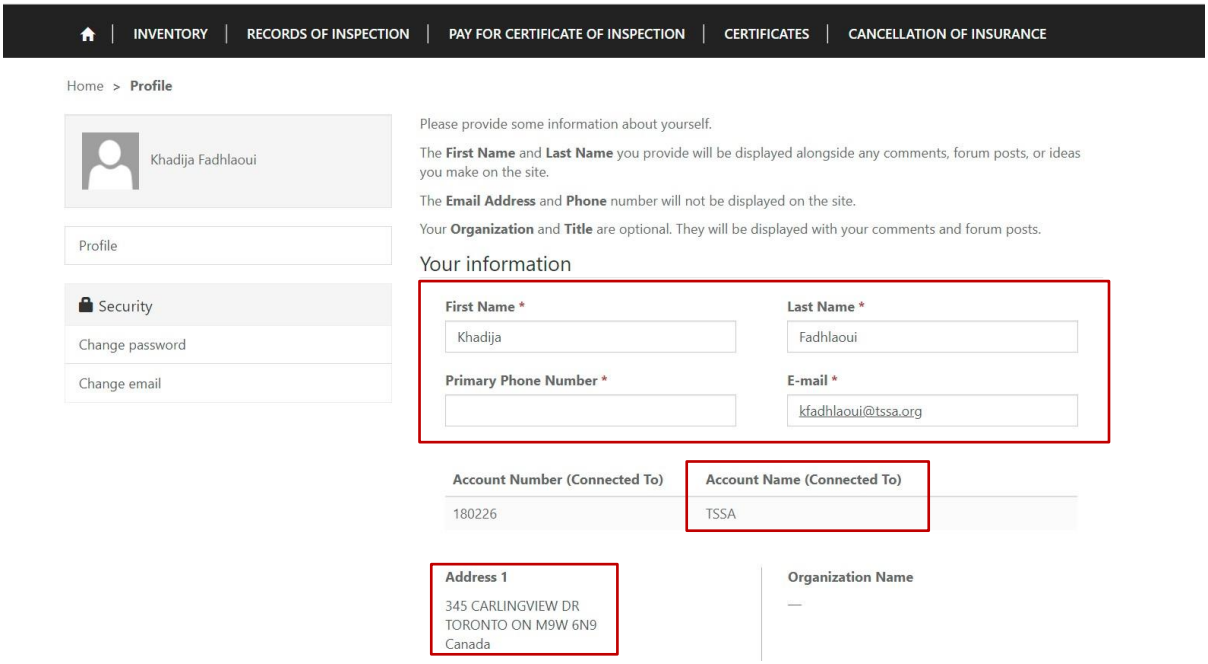


Profile Page

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.

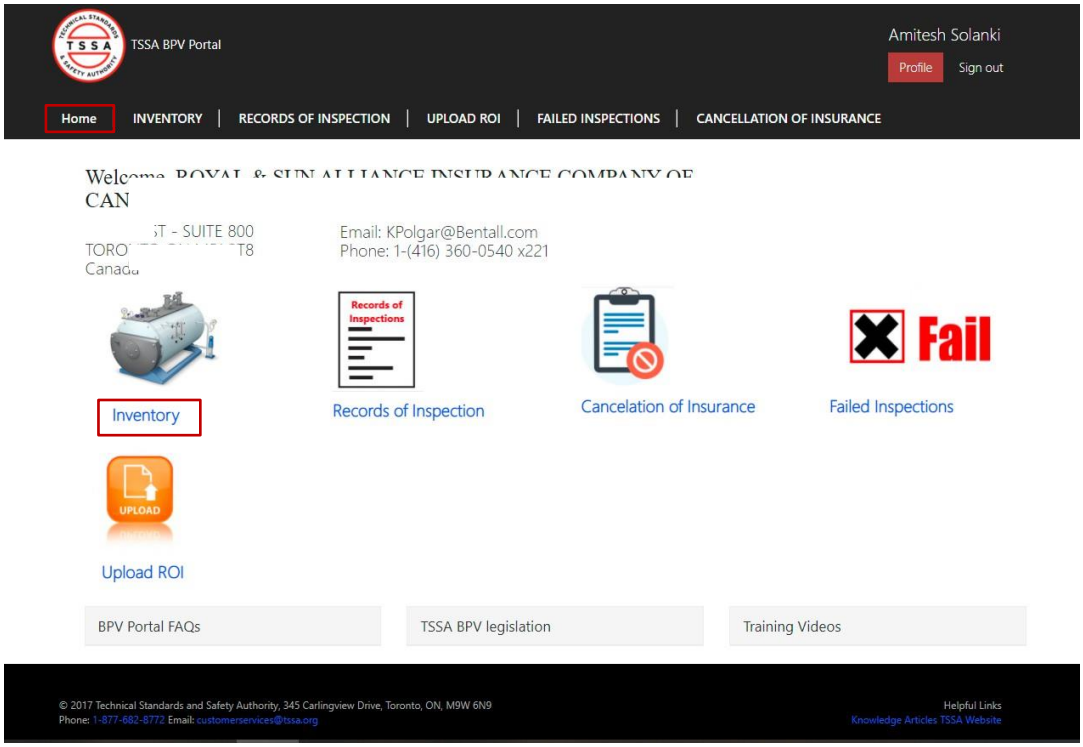
- *Name, Phone and Email address fields are editable. Changes to these fields will automatically update TSSA database.*



Home Page

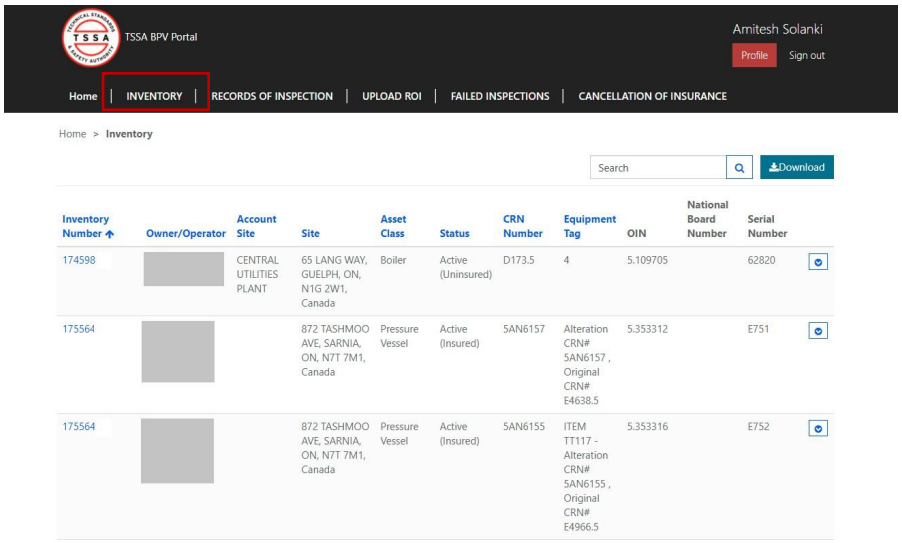
Home page will be displayed to users when clicking on the "Home" tab located at the top menu bar.

> Home page displays quick links to other pages on portal.



Inventory Page

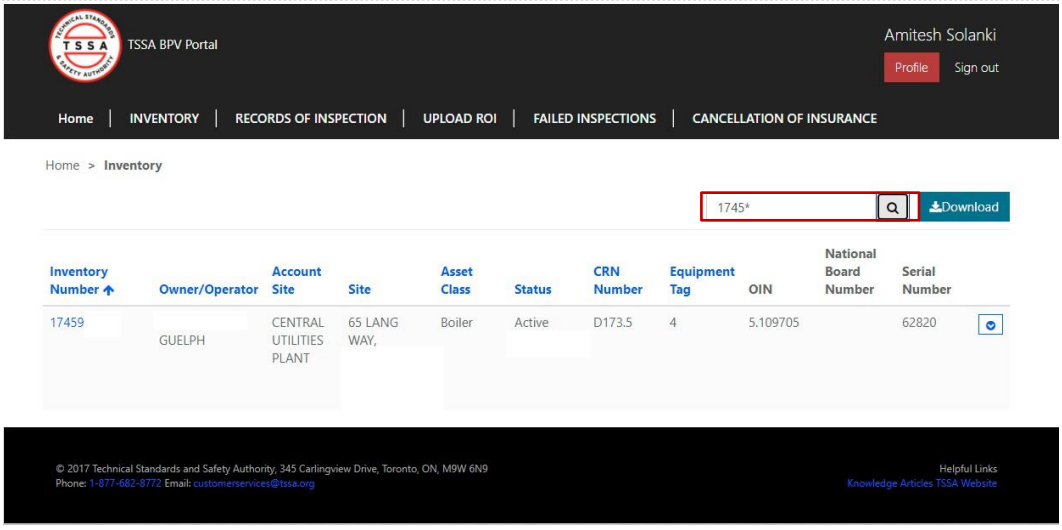
10. Inventory page displays a list of Inventories that the portal user is associated to in TSSA Database.



Searching for Inventories

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

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

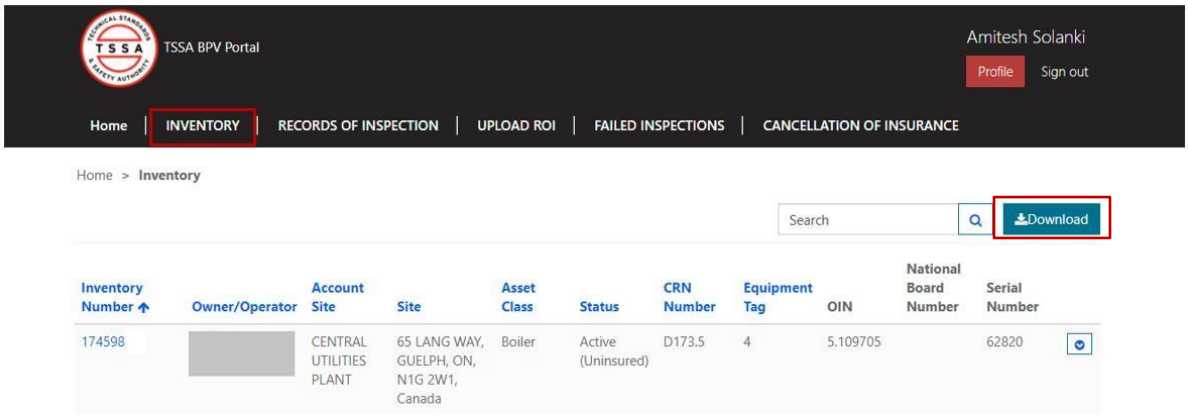


Downloading List of Inventories

11. To view a full list of your inventories, click on the Download button located on far right side of the screen.
> System will download excel list of inventories.

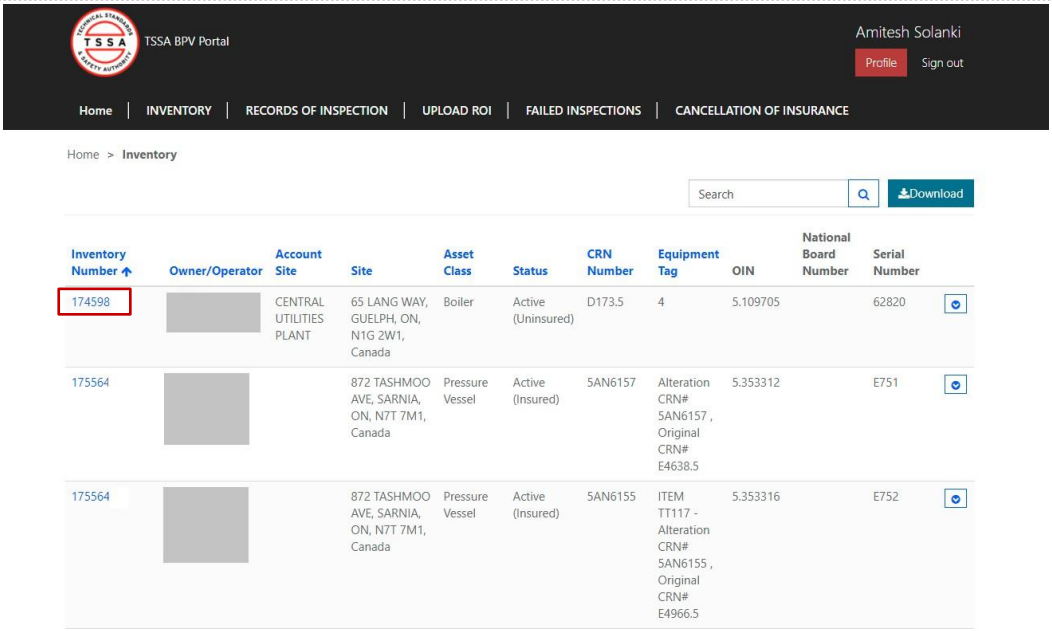
User can use the excel file to filter by site or owner/operator name

12.

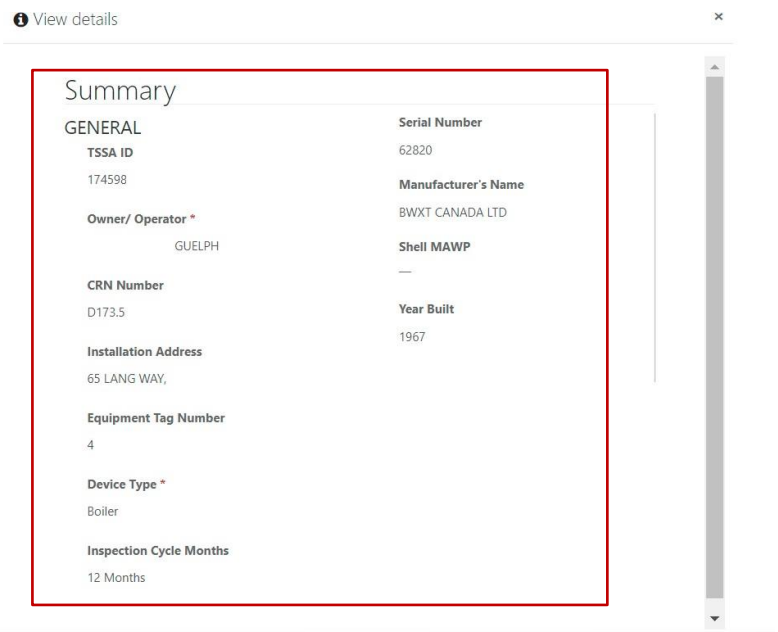


View Details of Inventory

13. Click on the inventory Number (TSSA UID) to see additional technical information of the device.
> Portal will direct user to details information page

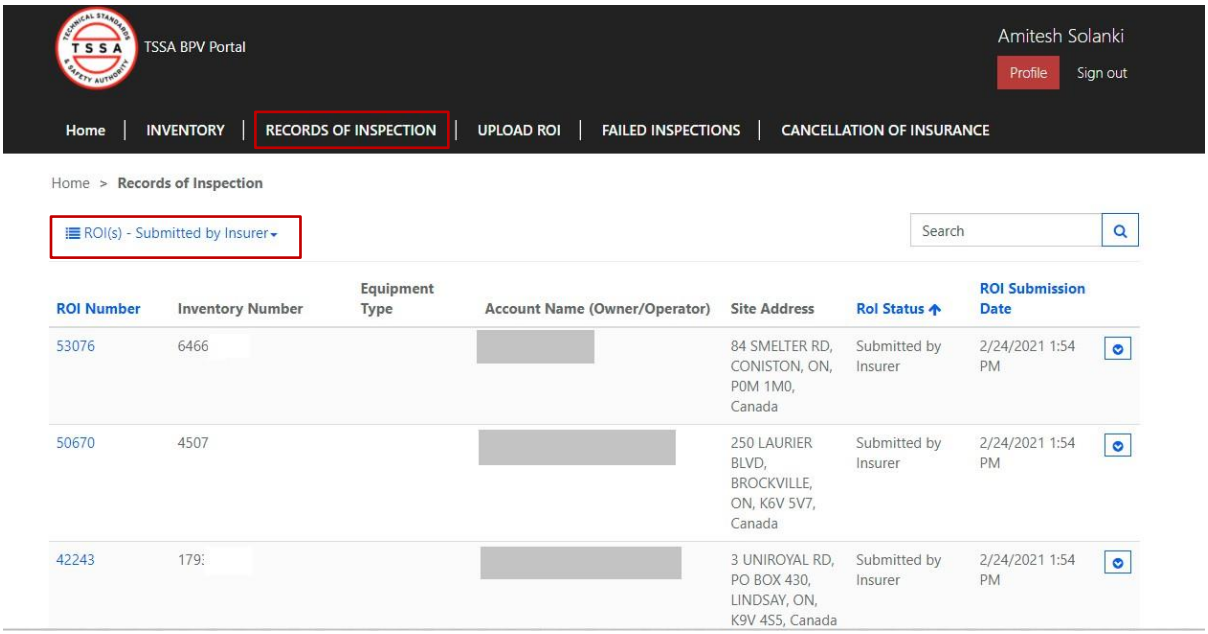


14. Review details of Inventory.



Records of Inspection Page

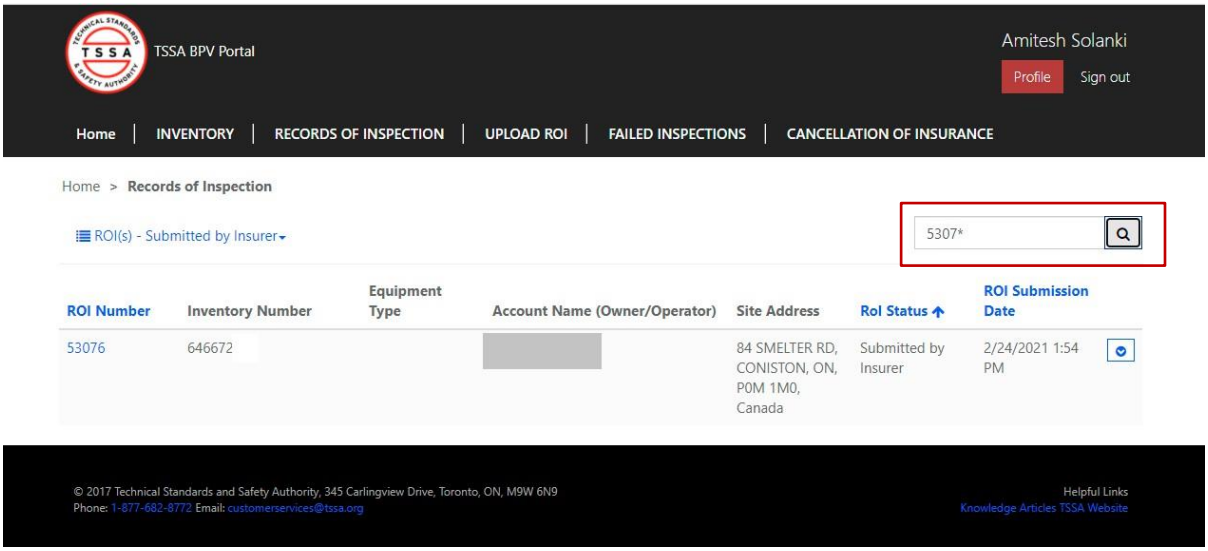
15. To view records inspections previously submitted click on Records of Inspection tab.
    > System will display records in "submitted by insurer" status on default page



Searching Records of Inspections

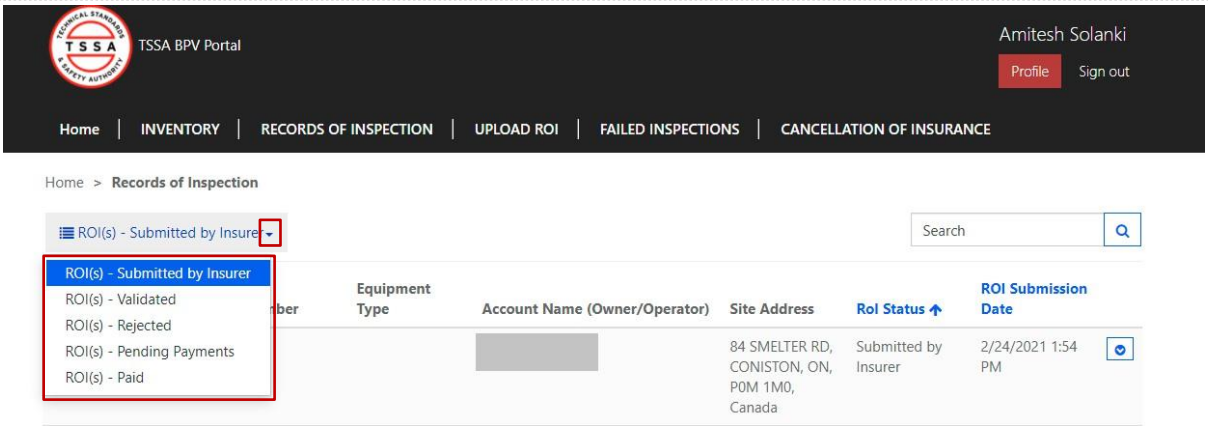
16. Use the quick search bar located at the top right side to find ROI's.

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



View Records of inspection in different status's

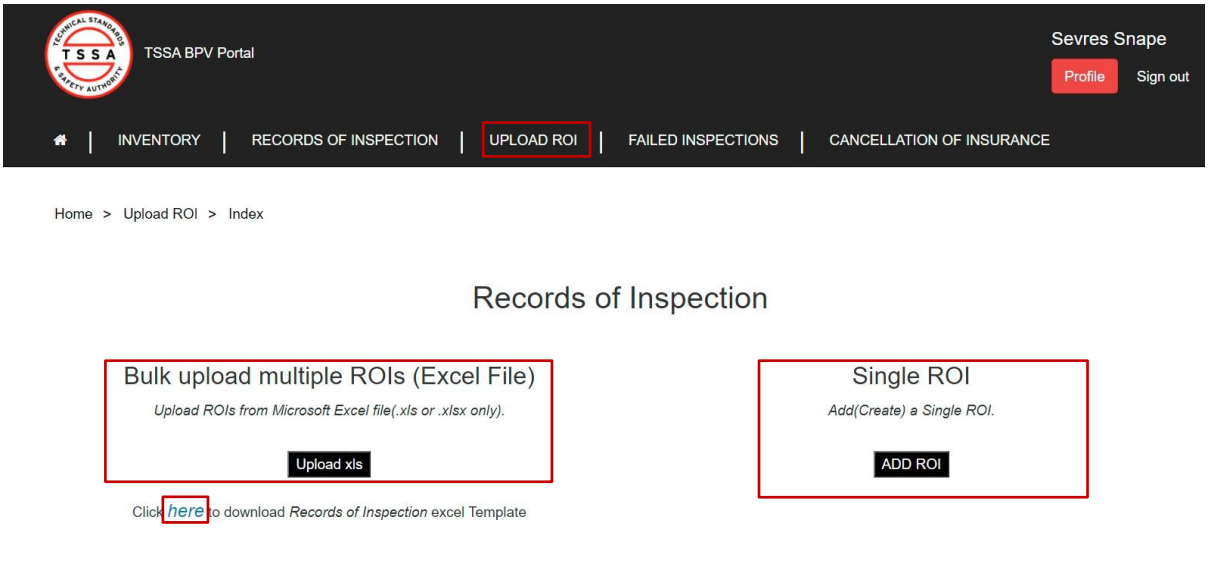
17. To view different status's of ROI's click on the drop down arrow next to Submitted by Insurer and select value from the list of values.



Upload Records of Inspections

The Upload ROI page is where you can upload either your bulk or complete a single form record of ROI's.

- *Bulk upload template can be downloaded when user clicks on "here" icon located at the bottom of the Upload xls button.*

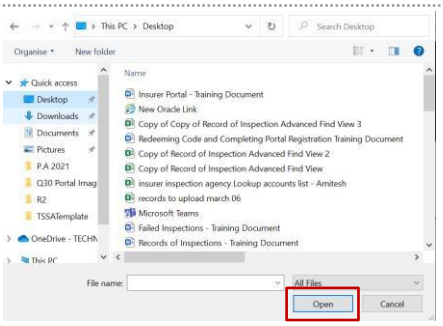


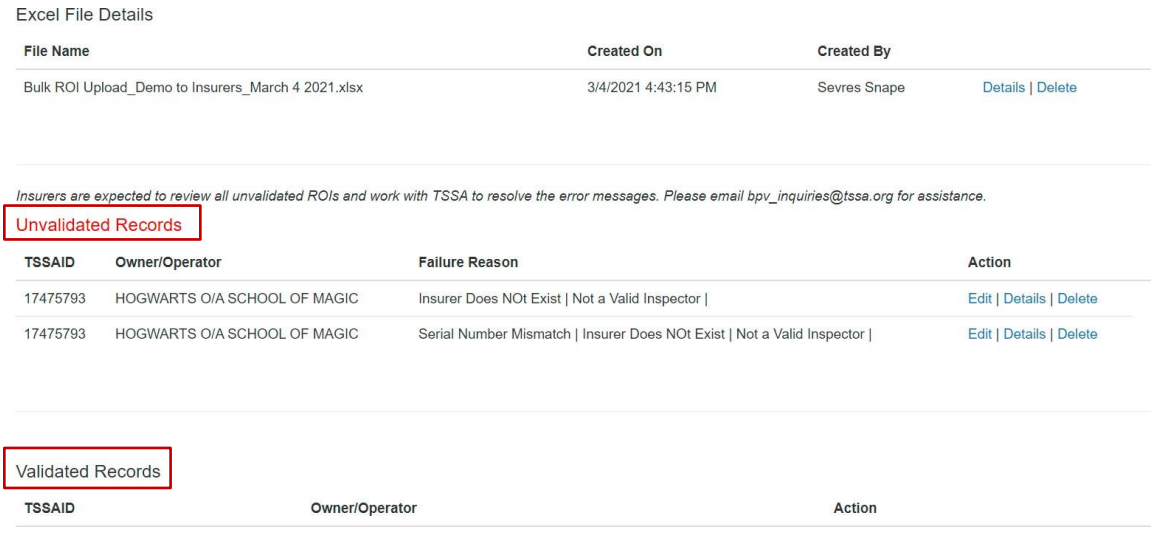
Bulk upload Records of Inspections

18. Click on **Upload xls** button on the Upload ROI page

19. Select **Choose File** button

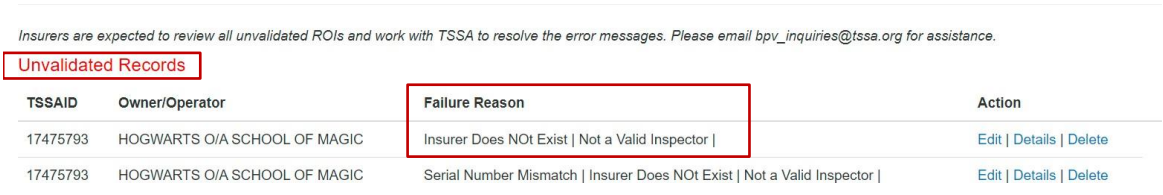
20. Find & Select file to upload. Click on Open button displayed in the dialog box.
    > System will direct users to the ROI Validation page (image below)





Editing & Resubmitting Unvalidated Records

21. ROI's that fail validation will be displayed under unvalidated records section. Reason for failure is displayed adjacent to the record.



Insurers are expected to review all unvalidated ROIs and work with TSSA to resolve the error messages. Please email bpv_inquiries@tssa.org for assistance.

Unvalidated Records

TSSAID	Owner/Operator	Failure Reason	Action
17475793	HOGWARTS O/A SCHOOL OF MAGIC	Insurer Does NOt Exist | Not a Valid Inspector |	Edit | Details | Delete
17475793	HOGWARTS O/A SCHOOL OF MAGIC	Serial Number Mismatch | Insurer Does NOt Exist | Not a Valid Inspector |	Edit | Details | Delete

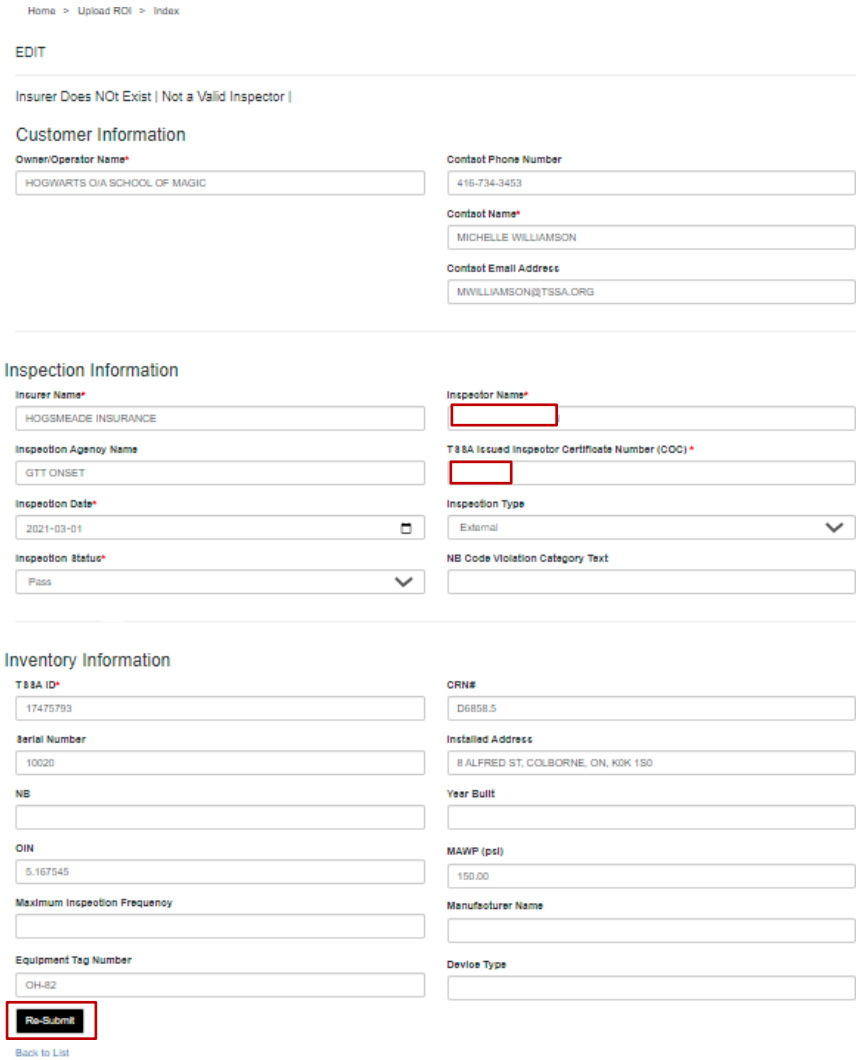
22. Click on Edit button to modify the record

Insurers are expected to review all unvalidated ROIs and work with TSSA to resolve the error messages. Please email bpv_inquiries@tssa.org for assistance.

Unvalidated Records

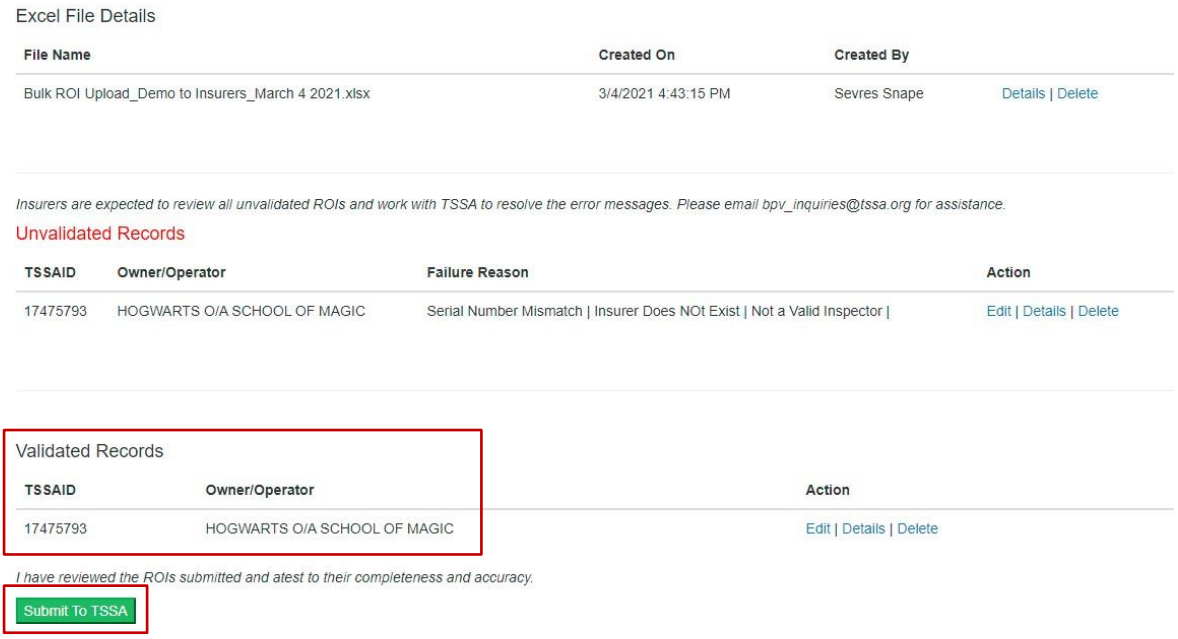
TSSAID	Owner/Operator	Failure Reason	Action
17475793	HOGWARTS O/A SCHOOL OF MAGIC	Insurer Does NOt Exist | Not a Valid Inspector |	Edit | Details | Delete
17475793	HOGWARTS O/A SCHOOL OF MAGIC	Serial Number Mismatch | Insurer Does NOt Exist | Not a Valid Inspector |	Edit | Details | Delete

23. Modify fields on the form that require corrections. Click on Re-submit button.



24. System will re-process the record and validate the information modified. When record passes validation it will be displayed under the Validated Records section. Click on Submit to TSSA button.

> System will send the information to TSSA data base and create an ROI record.

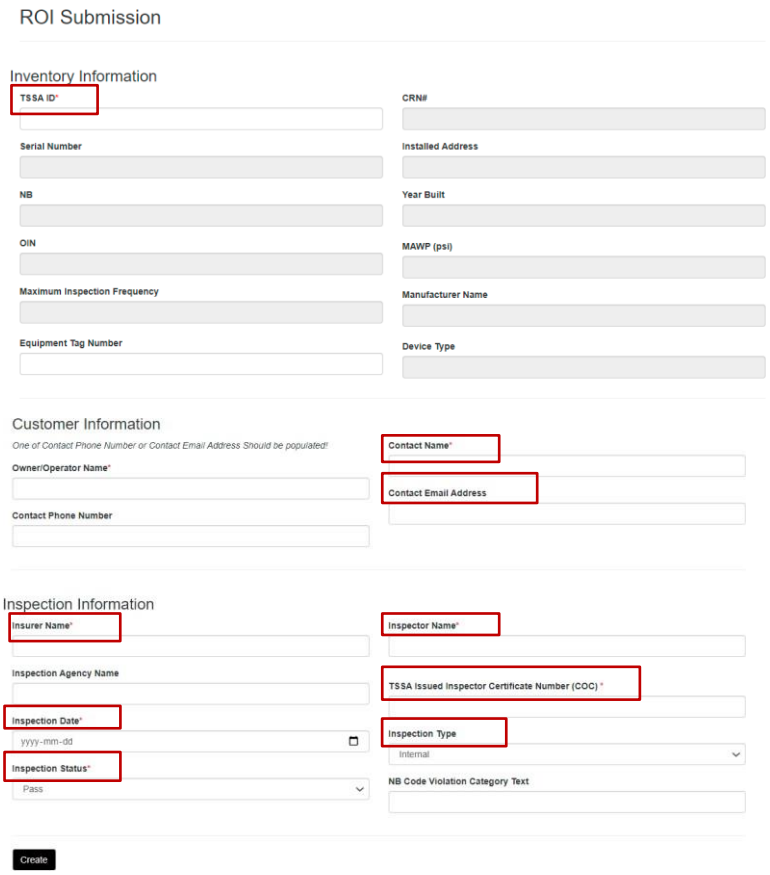


Single Form ROI

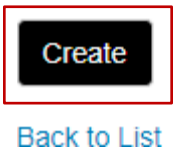
25. Click on Add ROI

26. Complete Fields on Form. Mandatory fields are marked in red astrix symbol (*).

- *System will autopopulate Inventory technical information also the owner/operator name of the device.*
- *System will auto populate COC number value when inspector name is selected & vise versa.*



27. Click on Create button located at the bottom of form to process.
    > Information provided on form will be pushed through validation process. User will be directed to the Unvalidated Triage page.



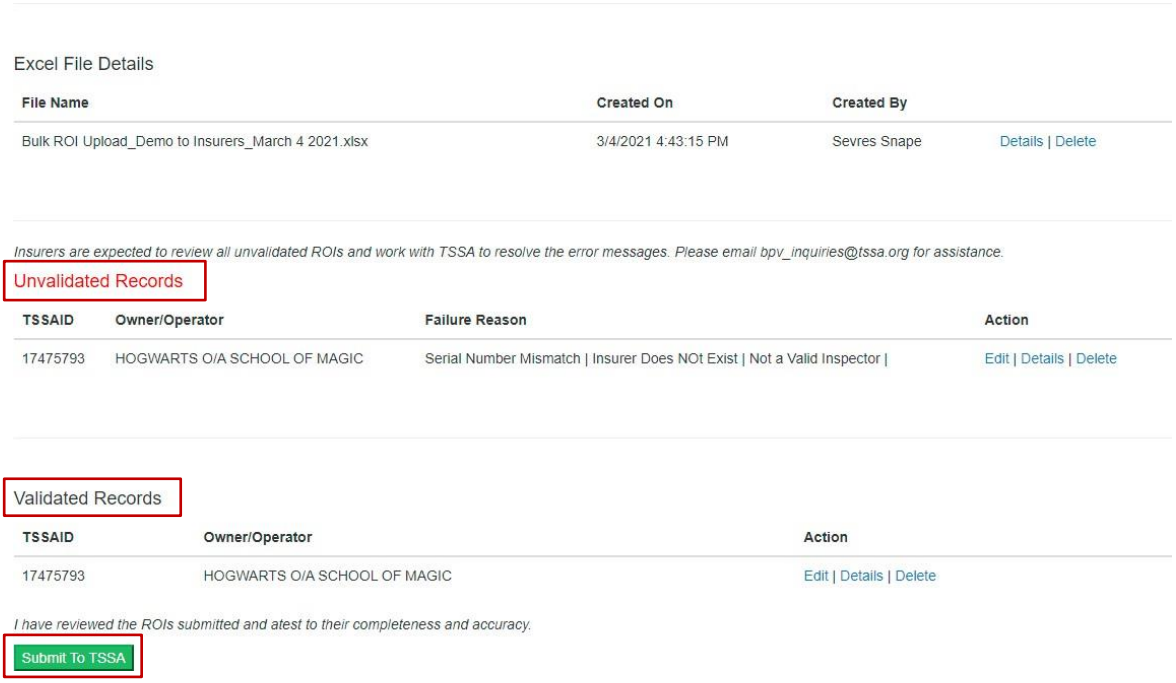
Back to List

28. Information that passes validation will be displayed under Validated Records section. If the record Failed, it will be displayed under the Unvalidated Records section. User will have the ability to edit and resubmit the form for processing.

    Click on **Submit to TSSA** button for records displayed under Validated Records section.

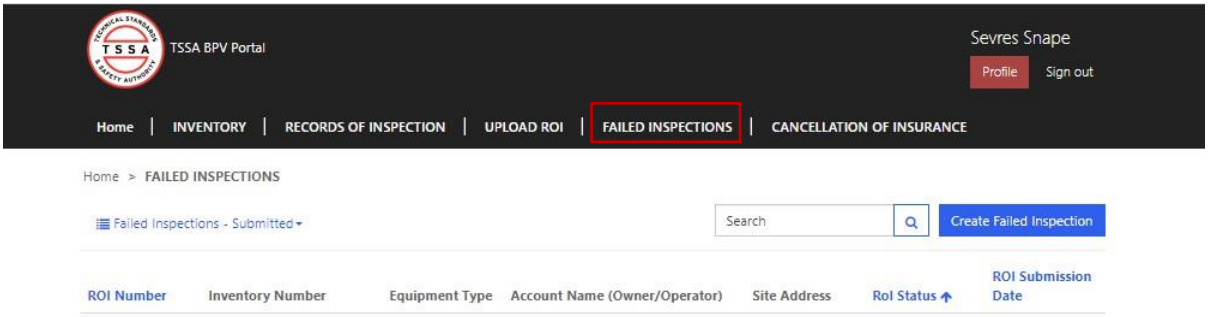
    See section "Editing & Resubmitting Records of Inspection" for detailed steps.

29.



Failed Inspections Page

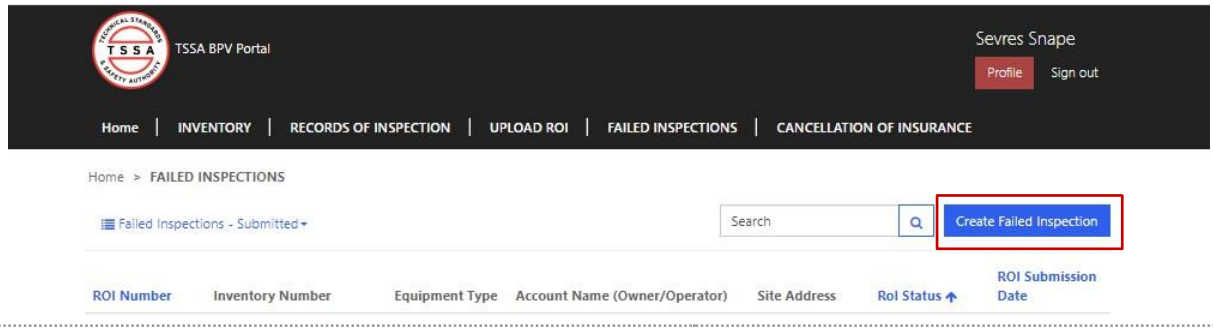
30. Click on Failed inspection Tab
> System will open the Failed Inspection page
> System will display any previously submitted Failed Inspections forms in the table on this page



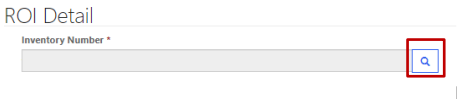
Submitting a Failed Inspection Form

31. Click on “Create Failed Inspection” button located on the far right side of the page

> System will open failed Inspection form

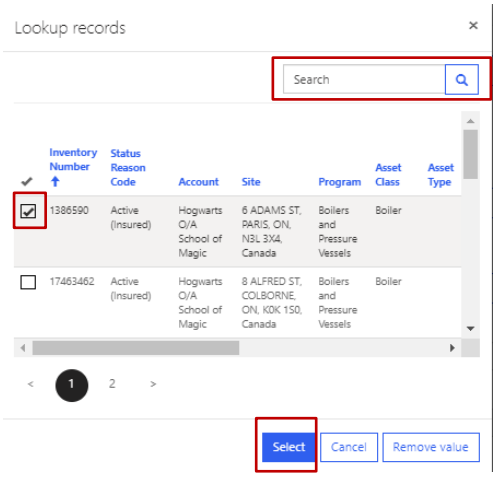


32. Click on the magnifying glass icon next to the field name " **Inventory number**"

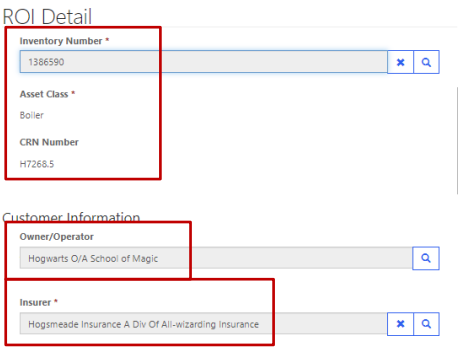


33. Using the Search bar, insert the inventory number. This will help narrow down the search in the data base. Once record is found a check mark icon will be displayed on the left side, this means the system has selected the record. Click on the Select button located at the button of the window.

> System will return the user to the failed inspection form

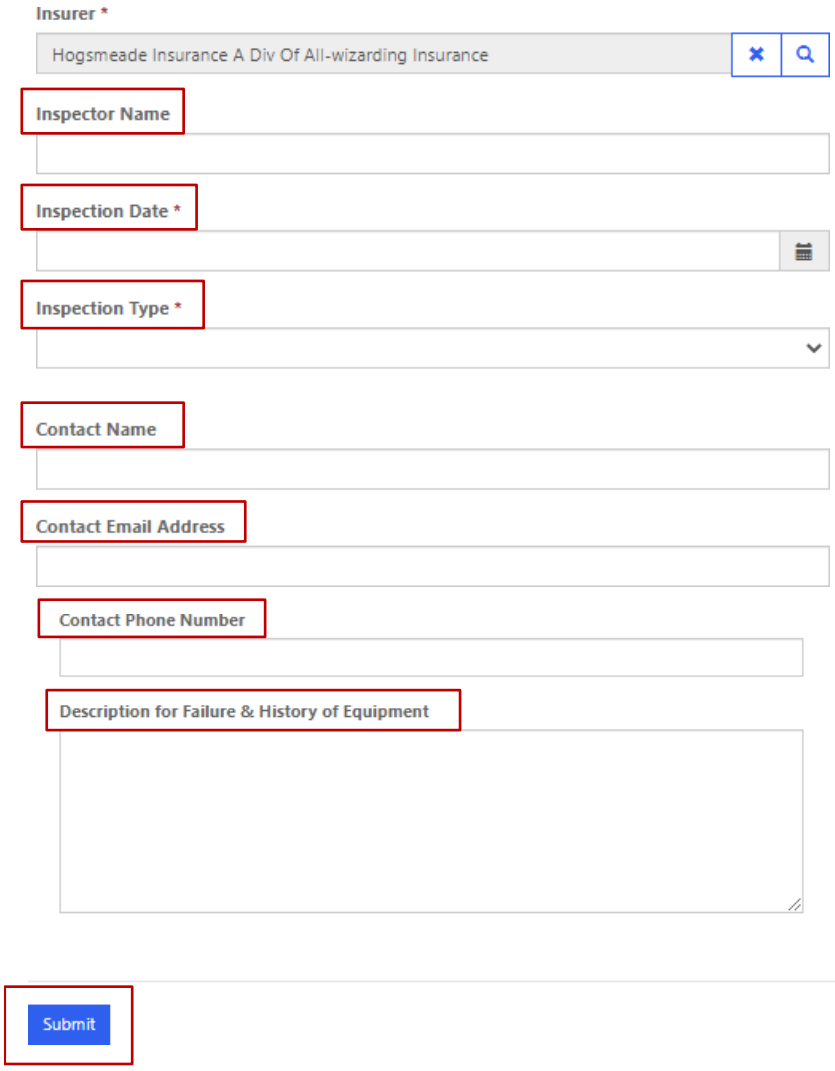


34. The system displays the inventory record selected and auto-populated the following fields on the form:

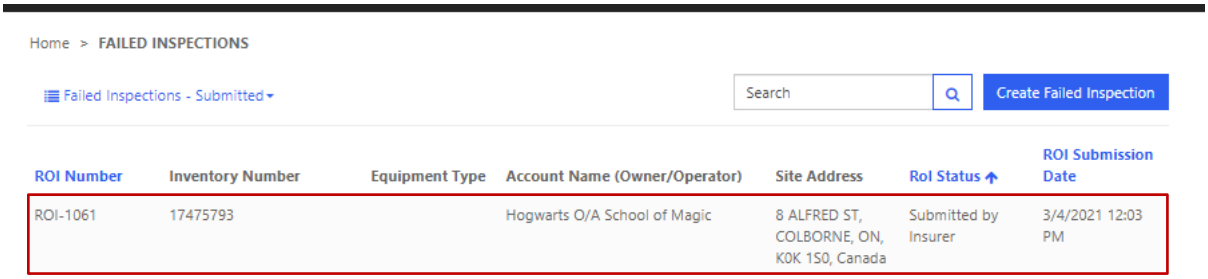


35. Complete the remaining fields on the form

Click on the Submit button upon completion

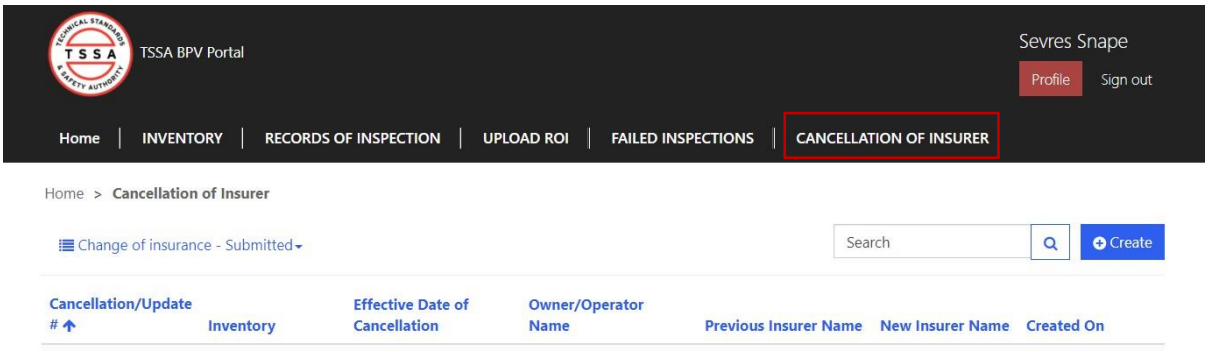


36. System will return to Failed Inspection page and display the submitted record on screen.

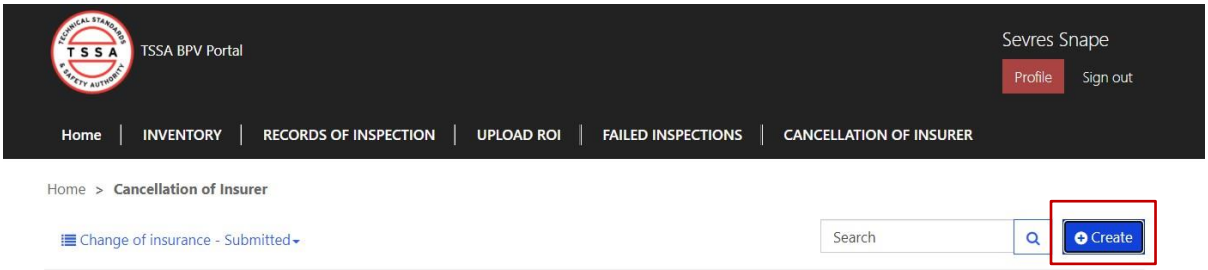


Cancellation of Insurer Page

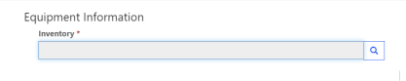
37. Click on Cancellation of Insurer Tab located on the top menu bar.



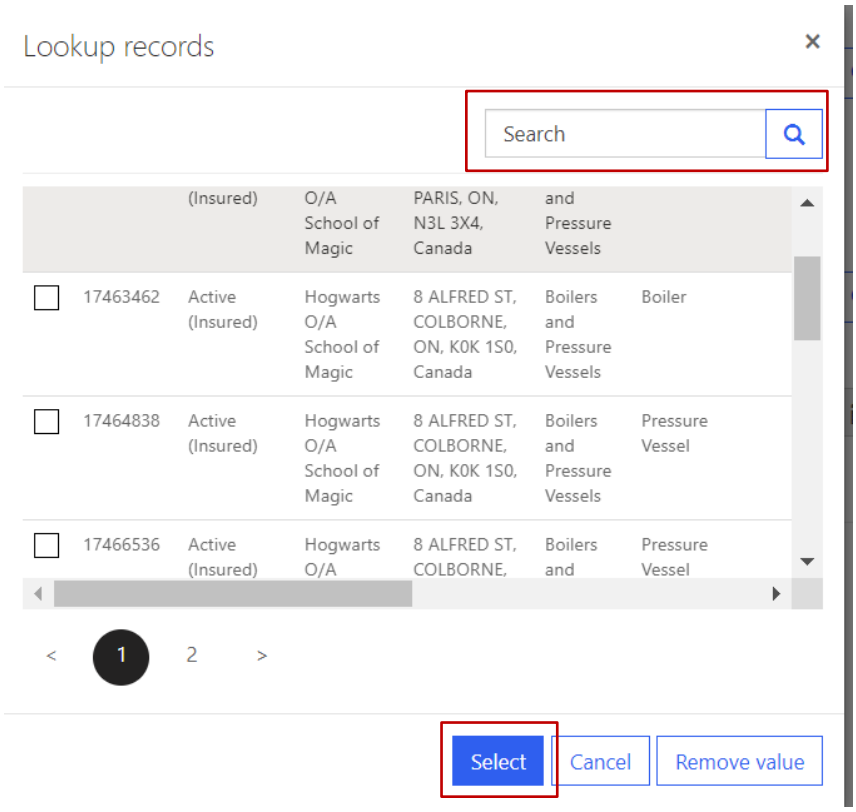
38. Select on Create button located on the far-left side.
> System will trigger the Cancellation form



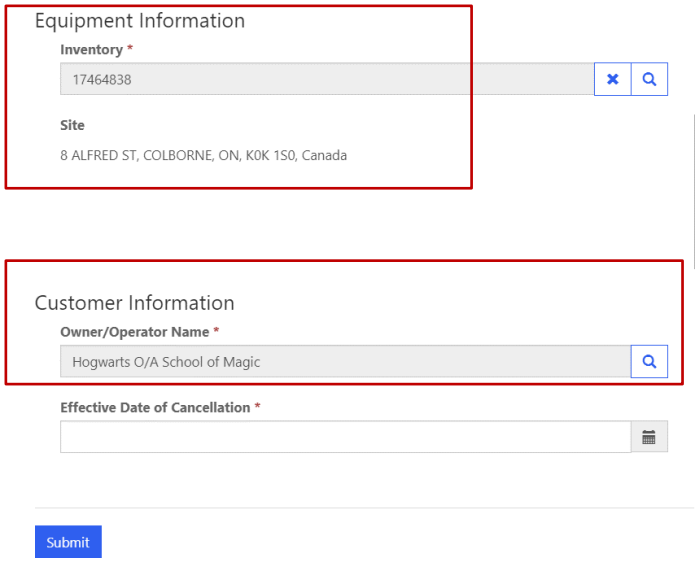
39. Click on the magnifying glass located on inventory field.
> System will display a window with a list of inventories that are associated with the user



40. 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

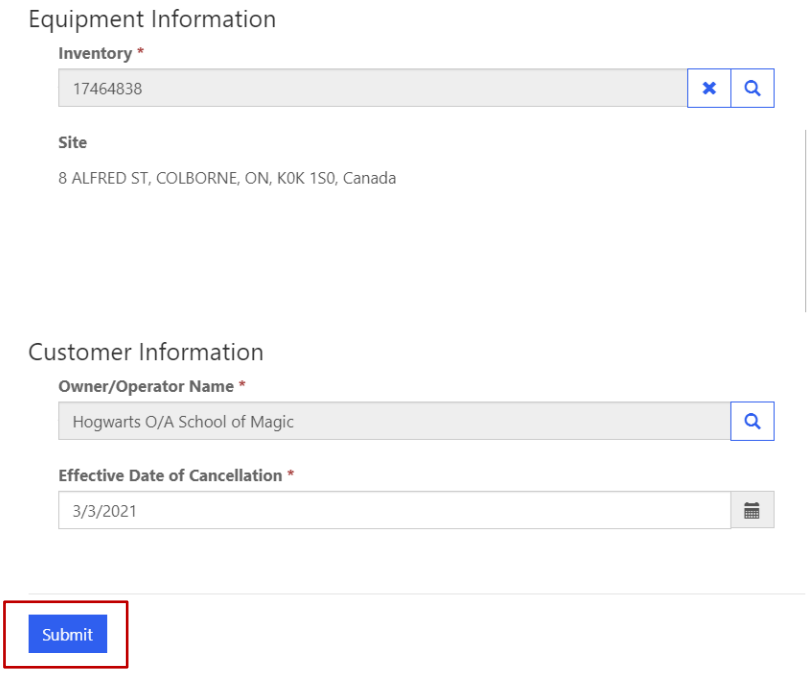


41. The system auto-displays the Site Address and Owner/Operator of the device.

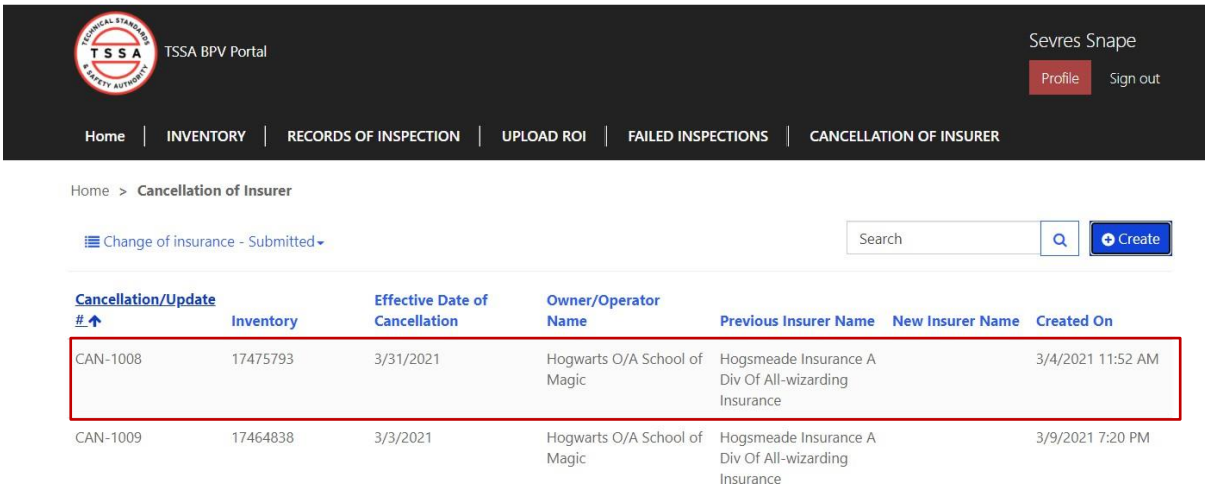


42. Complete the Effective Date of Cancellation Field.

43. Click on Submit button located at the bottom of the form



44. System will display the submitted record on Cancellation of Insurer Page



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.

ROI Error Message	Definition
TSSA UID Length is less than 8 digits	The inventory number noted on ROI is less than the mandatory length of 8 digits or greater.
TSSA UID is not found in the database	The inventory number noted on ROI doesn't exist in our database.
TSSA UID is Exempt	The inventory number noted on ROI is exempt as per regulations.
CRN Format is not Valid. Please edit or contact TSSA BPV Technical Services to Confirm CRN registration"	The CRN number noted on the ROI' contains " FITG or 0H" these are exempt. Please contact BPV technical services to confirm the CRN registered for that device.
Owner/Operator Name does not Match existing records.	The Owner/Operator name noted on the ROI does not match the information in the TSSA database.
Contact Name Incorrect Format	Contact Name noted on ROI contains a numeric or character ex. $%&
Contact Phone Number Incorrect Format	The contact Phone number noted on ROI contains a non-numeric value ex. $%&
Contact Email Address Incorrect Format	The contact Email address noted on ROI has no domain

Duplicate Detection	Another ROI with the inspection date and inspection type has already been submitted.

Frequently Asked Questions (FAQ)

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

   A. Please send an email to customerservices@tssa.org or call 416.734.3400.

2. Q. **My list of inventories is missing devices.**

   A. Please send an email to customerservices@tssa.org

3. 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