The Experience Advisors
Experience Matters

BPV COI – CX and Process Review – External Stakeholders Workshop

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Prepared by:

The Experience Advisors

Adam Comerford | Manager, EX Advisory | adam.comerford@experienceadvisors.ca

Carrie Chan | Senior Manager, EX Advisory | carrie@experienceadvisors.ca

William New | Director, EX Advisory | will@experienceadvisors.ca

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TECHNICAL STANDARDS & SAFETY AUTHORITY

TSSA

Agenda

1. **Introduction** – Workshop Guidelines, Project Background, Session Objectives (5-10 mins)

2. **Current State Challenges** (5-10 mins)

3. **The Baseline COI Journey Review** (5 mins)

4. **Activity** – Future-State Design Recommendations By Phase (80 mins)

5. Break (5-10 mins, if needed/time permitting)

6. **Wrap Up & Next Steps** (5 mins)

Total workshop time – 120 mins

Workshop Guidelines

1. **How We Will Collaborate**

   • Your feedback is essential — we're here to understand your perspectives.

   • Today's discussion focuses on process, technology, and experience improvements (not regulatory changes).

   • We welcome all voices; please help ensure everyone has an equal opportunity to participate.

2. **What Today Is and Is Not**

   • These are *planned improvements and an ideal future state, not finalized decisions.*

   • Feedback from today will help refine the design, which will still require business case development, costing, and implementation planning before any decisions are made.

   • We are not determining timelines during this session.

3. **Session Logistics**

   • Please use the virtual hand-raise feature for questions or comments.

   • The session will be recorded for internal documentation.

   • We will capture live feedback directly in the deck at designated points.

— Introduction & Who We Are

Who We Are

TSSA has partnered with Experience Advisors (XA) — a consulting firm specializing in service design, operational reviews, and customer experience transformation — to assess and modernize the BPV COI process. XA is serving as an external, neutral partner to gather stakeholder input, understand current challenges, and identify opportunities for improvement.

Why This Matters

The BPV COI process is critical to ensuring the safe operation of pressure equipment across Ontario. Today, owners, contractors, insurers, and TSSA experience challenges such as inconsistent data, manual workarounds, unclear steps, and limited digital tools. Together, TSSA and XA are working to strengthen technology, streamline workflows, and improve information flow across all stakeholders.

What We're Working Toward

Together, TSSA and XA are focused on strengthening technology, streamlining workflows, and improving information flow across all stakeholders.
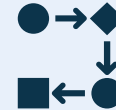
Project Objectives

Strengthen Safety & Compliance

Ensure all eligible, operating BPVs are inspected on time, maintain valid authorizations, and meet regulatory requirements consistently.

Improve the Stakeholder Experience

Make requirements clearer, interactions easier, and communications more transparent for owners, insurers, and contractors.

Lean Out the Process

Reduce duplication and rework, simplify handoffs, and improve efficiency across the full COI lifecycle for TSSA and stakeholders.

Enhance Technology & Data Quality

Improve workflow logic, automate manual steps, and strengthen data accuracy, validation, and system controls.
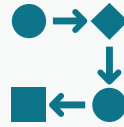
1

Briefly recap the current-state challenges and COI journey to ensure a shared understanding across stakeholders.

2

Walk through the proposed future-state improvements to highlight where the process could become clearer, simpler, and more efficient.

3

Gather stakeholder feedback on opportunities, considerations, and impacts to help refine the future-state design.

Note: These are planned future-state improvements and may be refined as feedback, business casing, and implementation planning progress.

Current State Challenges

Below is an inventory of challenges raised by a wide range of industry owners and insurers, captured through multiple interviews with external stakeholders and TSSA.

Data Integrity Limitations	Process Complexity & Duplication	Limited Technology Support	Variable Stakeholder Experience
Inconsistent or incomplete data reduces accuracy and requires additional follow-up.	Manual steps and duplicated tasks create inefficiencies across the COI process.	Key activities rely on manual workarounds due to limited automation and system guidance.	Stakeholders face unclear requirements and limited self-service options throughout the journey.

Data Integrity Limitations

- Challenges with correcting inventory data
- Numerous errors when uploading ROIs
- Variable dates and inspection timelines
- Portal lacks important data fields

Process Complexity & Duplication

- ✓ Cumbersome validation and payment **(solved)**
- ✓ Inability to pay multiple services in bulk **(solved)**
- Large number of lapsed authorizations
- Large number of notices
- Delayed or duplicated invoicing
- Inconsistent communication notices
- Inefficient submission of requests
- Complex steps for reporting violations

Limited Technology Support

- Problems in identifying exempt devices
- Unable to set preference for digital COIs
- Unable to download invoices
- Challenges booking first inspections
- Unintuitive navigation
- Cumbersome removal from service requests
- Inaccessible reporting of rental devices
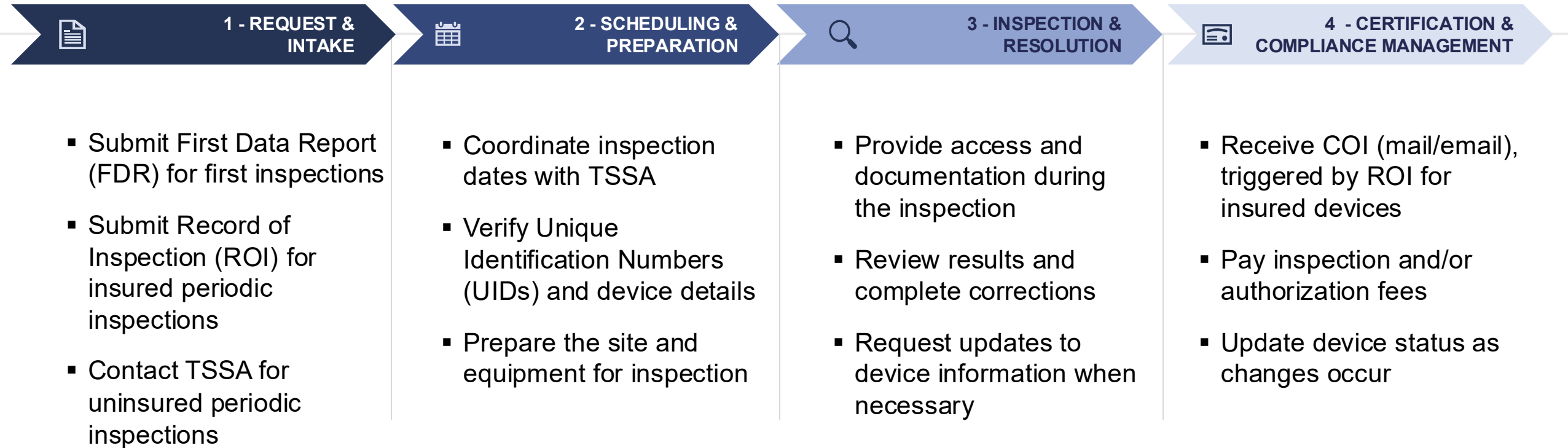- Difficult cancellation of insurance

Variable Stakeholder Experience

- ✓ Inability to download inventory list **(solved)**
- ✓ Difficulty in searching and verifying status **(solved)**
- Difficulty accessing inventory list
- Inability to download COIs in bulk
- Unclear reference information
- Inability to reach correct resources
- Challenging process for UID requests

— The Baseline COI Journey

The map below outlines the baseline customer journey for the Boiler and Pressure Vessel (BPV) Certificate of Inspection (COI) lifecycle across its key phases.

1 - REQUEST & INTAKE	2 - SCHEDULING & PREPARATION	3 - INSPECTION & RESOLUTION	4 - CERTIFICATION & COMPLIANCE MANAGEMENT
▪ Submit First Data Report (FDR) for first inspections ▪ Submit Record of Inspection (ROI) for insured periodic inspections ▪ Contact TSSA for uninsured periodic inspections	▪ Coordinate inspection dates with TSSA ▪ Verify Unique Identification Numbers (UIDs) and device details ▪ Prepare the site and equipment for inspection	▪ Provide access and documentation during the inspection ▪ Review results and complete corrections ▪ Request updates to device information when necessary	▪ Receive COI (mail/email), triggered by ROI for insured devices ▪ Pay inspection and/or authorization fees ▪ Update device status as changes occur

This high-level view helps align all stakeholders before we review proposed improvements.

Future-State Design – Request & Intake

The matrix below will help us recap current challenges, discuss future-state opportunities, and capture any feedback for the **Request & Intake phase.**

Workshop Input Matrix – Request & Intake Phase

🏃 Current State Challenges (Recap)	✔ Key Future-State Opportunities	💡 Stakeholder Feedback
ROI submission triggers a new COI expiry date leading to timing and compliance issues.	**Separate ROI and COI workflows.** COIs will have fixed renewal dates (not triggered by ROI). Two prerequisites to renew: (1) a valid ROI submitted by insurer up to 6 months in advance of current expiry. (2) payment is received. Note: the ROI cannot have any open high-risk violations. (late fees will apply for expired COIs)	
Owners must validate ROIs in the portal, adding steps that many see as unnecessary.	Remove the requirement for owners to validate ROIs; rely on system validation and allow optional confirmation only if needed at payment.	
First inspection requests are submitted through a static PDF FDR, often incomplete.	Digitize the FDR into a guided portal form with mandatory fields, and prepopulated data, and validation checks.	
Owners cannot see a complete view of their BPV inventory to reconcile with insurer reports.	✓ Enable owners to download a full inventory report from the portal to support reconciliation and internal tracking. (Already solved).	

Future-State Design – Scheduling & Preparation

The matrix below will help us recap current challenges, discuss future-state opportunities, and capture any feedback for the **Scheduling & Preparation phase.**

| 1 - REQUEST & INTAKE | 2 - SCHEDULING & PREPARATION | 3 - INSPECTION & RESOLUTION | 4 - CERTIFICATION & COMPLIANCE MANAGEMENT |

Workshop Input Matrix – Scheduling & Preparation Phase

🏃 Current State Challenges (Recap)	✔ Key Future-State Opportunities	💡 Stakeholder Feedback
BPVs at the same site have different expiry dates, making renewals difficult to track for owners and insurers.	Align COI renewal dates per location (or by request), adjusting day/month but maintaining the existing year.	
Notifications (reminders, expiries, cancellations, invoices) are sent individually and often by device, creating clutter.	Consolidate and digitize COI-related notifications so they are grouped by account or site and easier to act on.	
Customers must call TSSA to confirm UIDs or submit UID requests via PDF.	Introduce portal-based UID lookup and structured UID request workflow; retire PDF forms.	
Uninsured periodic inspections happen only when owners call in, causing delays.	Automatically trigger and manage uninsured periodic inspections based on COI renewal dates and due cycles. (Already in progress).	
Insurers cannot immediately view site inventory after writing a policy.	Allow insurers to link policies to sites in the portal and gain immediate access to BPV inventory.	

Future-State Design – Inspection & Resolution

The matrix below will help us recap current challenges, discuss future-state opportunities, and capture any feedback for the **Inspection & Resolution phase.**

| 1 - REQUEST & INTAKE | 2 - SCHEDULING & PREPARATION | 3 - INSPECTION & RESOLUTION | 4 - CERTIFICATION & COMPLIANCE MANAGEMENT |

Workshop Input Matrix – Inspection & Resolution Phase

🏃 Current State Challenges (Recap)	✔ Key Future-State Opportunities	💡 Stakeholder Feedback
Insurer inspections cannot count as first inspections.	Accept eligible insurer inspections as first inspections only for devices installed before 2018 (will require photo of nameplate for validation).	
Devices inspected for the first time are not automatically added to insurer inventories.	Automatically add newly inspected devices to insurer inventory records in the portal (will be able to see this in your inventory after the first inspection).	
Owners/insurers are unable to update the CRN for IPXX CRNs.	Add the ability for owners/insurers to update the IPXX CRN through the portal (without submitting a form manually).	
The portal does not flag exempt-from-regulation devices during inspection requests.	Add logic to identify exempt devices and prevent unnecessary inspection requests or site visits.	

Future-State Design – Certification & Compliance Management (1/2)

The matrix below will help us recap current challenges, discuss future-state opportunities, and capture any feedback for the **Certification & Compliance Management phase.**

1 - REQUEST & INTAKE	2 - SCHEDULING & PREPARATION	3 - INSPECTION & RESOLUTION	4 - CERTIFICATION & COMPLIANCE MANAGEMENT

Workshop Input Matrix – Certification & Compliance Management Phase

🏃 Current State Challenges (Recap)	✔ Key Future-State Opportunities	💡 Stakeholder Feedback
Owners and insurers previously had to call or submit manual forms to report insurance cancellation.	✓ Owners and insurers can now report insurance cancellation directly through the portal, ensuring records are updated promptly (Already solved).	
ROIs submitted for devices exempt from periodic inspections were being accepted, creating unnecessary work.	✓ ROIs for exempt-from-periodic devices are now automatically rejected, preventing unnecessary processing and clarifying status (Already solved).	
Owners of uninsured devices receive separate invoices for periodic inspections and COIs.	Combine periodic inspection and authorization fees for uninsured devices into one invoice.	
Notification language is technical and difficult for customers to interpret.	Simplify and standardize notification language and formatting across all COI communications.	

Future-State Design – Certification & Compliance Management (2/2)

The matrix below will help us recap current challenges, discuss future-state opportunities, and capture any feedback for the **Certification & Compliance Management phase.**

1 - REQUEST & INTAKE	2 - SCHEDULING & PREPARATION	3 - INSPECTION & RESOLUTION	4 - CERTIFICATION & COMPLIANCE MANAGEMENT

Workshop Input Matrix – Certification & Compliance Management Phase

🏃 Current State Challenges (Recap)	✔ Key Future-State Opportunities	💡 Stakeholder Feedback
COIs are mailed and must be downloaded individually; expired COIs are not accessible.	Move toward digital-only COIs (still optional for now), add bulk download, enable access to expired COIs, and notify owners when COIs are ready.	
Owners/insurers cannot update device inventory info or ROI contact details themselves.	Provide targeted self-service updates (inventory status, ROI contact data, and selected technical data).*	
Rental/off-site equipment and removals require manual form submissions.	Add portal-based submission for removals, shutdowns, and rental/off-site status changes, with clearer workflows.	
Limited visibility into object-level data for insurers.	Expand insurer access to selected device data (exact elements TBD) to improve oversight and planning.	

See details on next slide

Future-State Design – BPV Status Changes

Below are the proposed, still-to-be-determined BPV status changes that owners/insurers may be able to update through self-service in the future state.

MOVED IN PROVINCE

MOVED OUT OF PROVINCE

SCRAPPED

CHANGE OF OWNERSHIP

TEMPORARILY REMOVED FROM SERVICE

Next Steps

- XA and TSSA to consolidate and apply external stakeholder feedback to refine the future-state design (**December**)

- XA and TSSA to develop a Business Requirements Document (BRD) to support the future-state design (**January-February**)

- TSSA to begin future-state design build (**April**)

- Launch (go-live) (**Spring 2027**)

![The Experience Advisors — Experience Matters]

Thank You

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The Experience Advisors

20 Bay Street – 11th Floor

Toronto, ON. M5J 2NB

P: 905-477-5544   E: info@experienceadvisors.ca