
CA Connect

ASME Customer User Guide

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Version 1.5

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About CA Connect

The CA Connect system is used for managing the ASME Conformity Assessment certification and accreditation process. CA Connect has been replaced with a new and improved system that provides a more encouraging user experience. The new system introduces an improved approach for online submission and processing of applications and documents. It makes it easier for Users to navigate through the system and track the status of the certification/accreditation processes. It supports all browsers and desktops and offers quicker system response time.

Who uses CA Connect?

The CA Connect System is used by the following individuals:

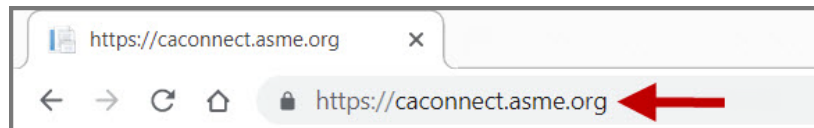
- Company Certificate Holders
- Primary Company Contacts
- Trusted Company Contacts
- ASME Consultants
- AIA Contacts
- National Board of Boiler and Pressure Vessel Inspectors
- Jurisdiction Contact
- ASME Conformity Assessment Administrative and Technical Staff

This User Guide was written for the Primary Company Contact. It contains images that illustrates the new system and walks you through your process.

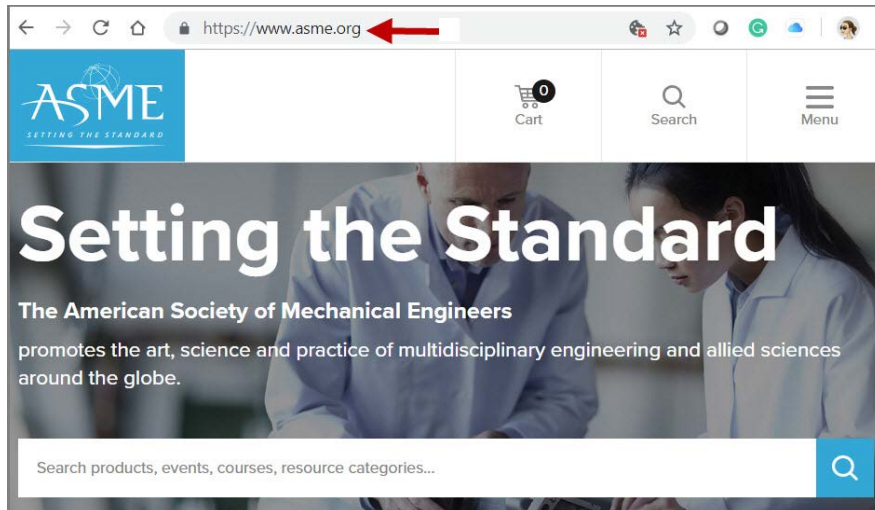
CA Connect Access

Before you start using CA Connect, you need to be registered with an account in CA Connect prior to beginning the application submittal process. There are two ways in which you can access the system.

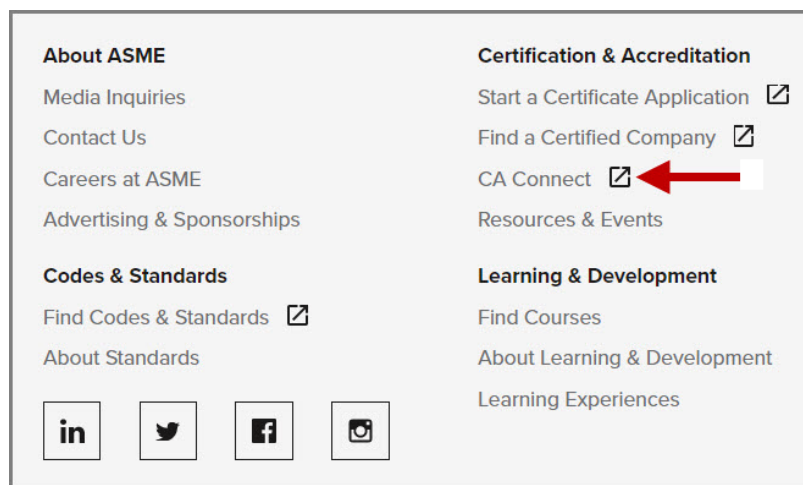
1. To gain direct access to CA Connect, open your web browser and type CACONNECT.ASME.ORG. You will be directed to the CA Connect Sign In page.



2. You can also access the system via the ASME.ORG website.
 - a. Open your web browser and type **ASME.ORG**



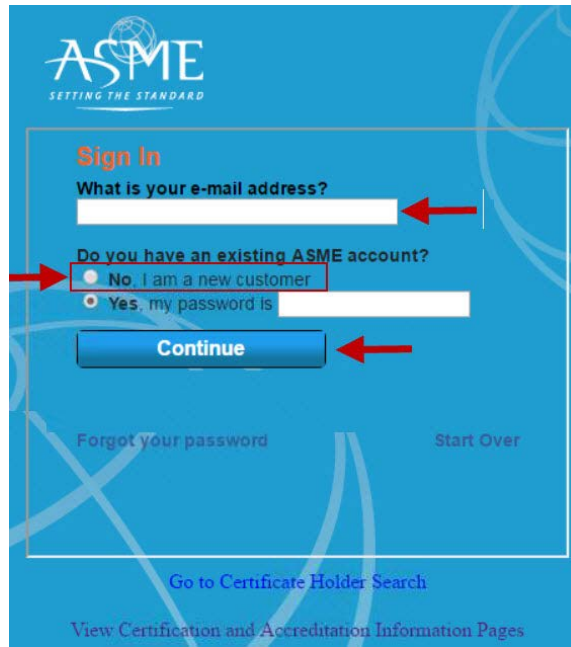
- b. Scroll down to the bottom of the page.
- c. Click the caconnect link on the page.
- d. You will be directed to the CA Connect Sign In page.



Create New Primary Contact Account

If you are **not a registered user** of CA Connect and are creating a new Primary Contact account, in addition to creating a New Company record for the organization, follow the steps listed below.

1. Open your browser and enter **CACONNECT.ASME.ORG** in the address bar.
2. Enter your **email address** to be registered in CA Connect.
3. Select **No, I am a new customer**.
4. Click **Continue**.



ASME
SETTING THE STANDARD

Sign In

What is your e-mail address?

Do you have an existing ASME account?
 No, I am a new customer
 Yes, my password is


Continue

[Forgot your password](#) [Start Over](#)

[Go to Certificate Holder Search](#)

[View Certification and Accreditation Information Pages](#)

5. You will then be prompted to enter your password. Enter your **password** then click the **Log In** button.



ASME
SETTING THE STANDARD

Creating new account...

Email:

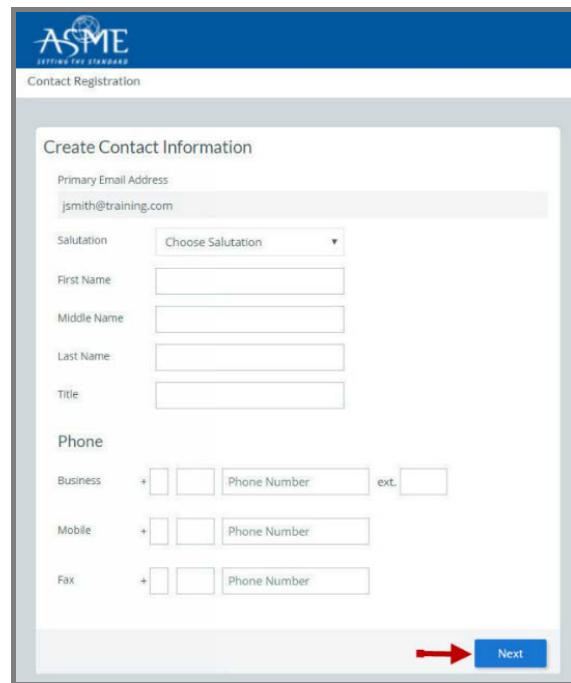
Password: (7 to 32 characters)

Confirm Password:

Create Account

[Start Over](#)

3. You will be directed to the **Create Contact Information** page.
4. Enter the Primary Contact information in the designated fields. All mandatory fields must be completed to move to the next page. The mandatory fields are
 - a. Salutation
 - b. First Name
 - c. Last Name
 - d. Business Phone number (see note).
5. When done, click **Next** to continue.



The screenshot shows the ASME 'Contact Registration' page with the 'Create Contact Information' form. The form includes the following fields:

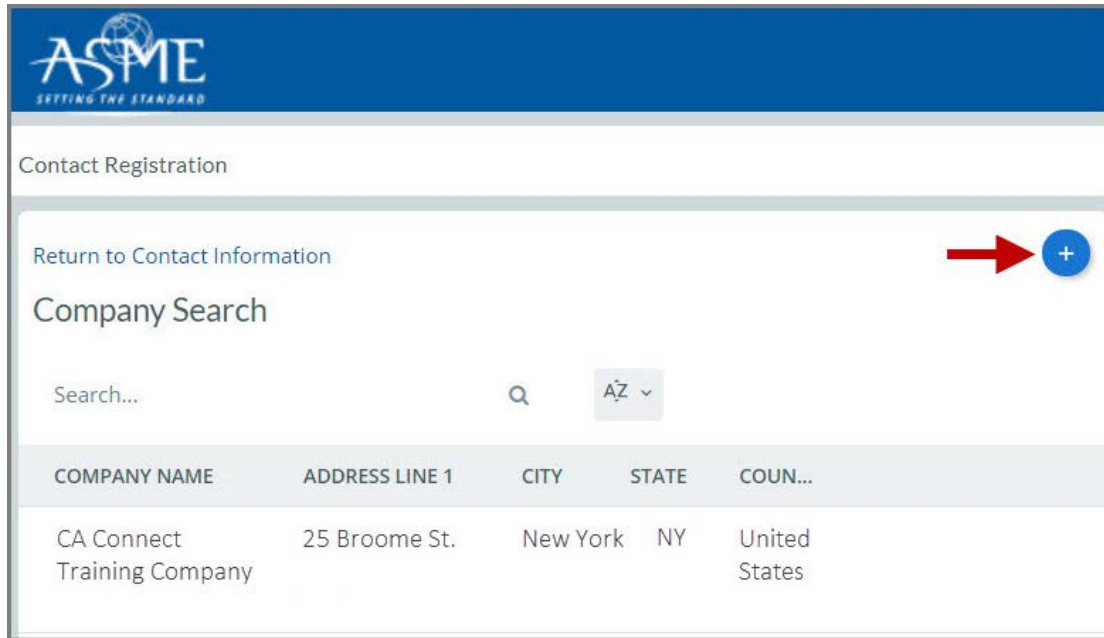
- Primary Email Address: jsmith@training.com
- Salutation: Choose Salutation (dropdown menu)
- First Name: [text input]
- Middle Name: [text input]
- Last Name: [text input]
- Title: [text input]
- Phone: Business, Mobile, and Fax (each with a country code dropdown, a phone number input, and an extension input)

A red arrow points to the 'Next' button at the bottom right of the form.

6. You will be directed to the Company Search ([see Create New Company Account](#)).

Create New Company Account

1. On the **Company Search** page, click the blue circle (+) **Add** icon used to add a new company.



2. On the **Create New Company** page, enter the **Company Information**, **Plant Address**, and **Program Type** in the designated fields. The **Mailing Address** is optional. All mandatory fields must be completed to move to the next page. The mandatory fields include:
 - **Company Information**
 - Company Name
 - Legal Company Name
 - Program Types.
 - **Plant Address**
 - Address Line 1
 - Country
 - City
 - Zip/Postal Code
3. When done, click **Confirm**.

ASME
SETTING THE STANDARD

Home Profile Processes Applications Certifications Documents Emails **New Company**

Company Information
 Company Name
 Legal Company Name
 Abbreviation
 Division Name
 Company Website
 Program Types

Plant Address
 Address Line 1
 Address Line 2
 + Add Line 3
 Country
 Select Country
 City
 Zip/Postal Code

Mailing Address
 Address Line 1
 Address Line 2
 + Add Line 3
 Country
 Select Country
 City
 Zip/Postal Code

Confirm

4. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only.
5. Verify the accuracy of the address to ensure the correct address is displayed.
6. If you want to use the USPS validated address, select the **Use Valid USPS Address** checkbox. You can also bypass the checkbox and use the address you entered.
7. Click **Save**. You will be directed to **New Contact Email Verification**.

Please review the addresses below.

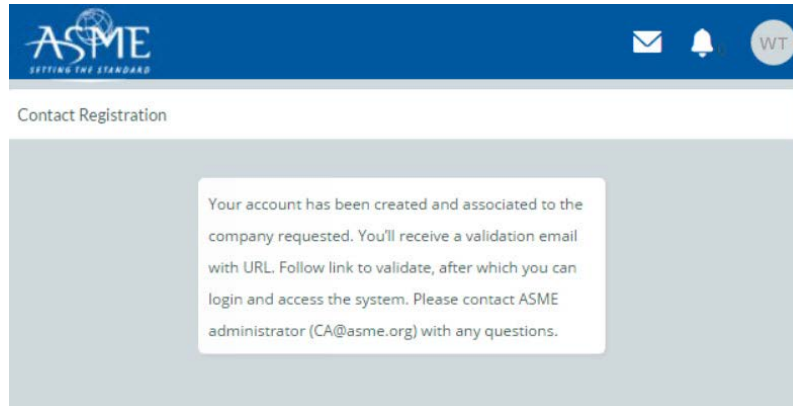
Plant	
USPS Validated	You Entered
10 Main St	10 Main St
Poughkeepsie, NY 12601	Poughkeepsie, NY 12603
United States	United States
<input checked="" type="checkbox"/> Use Valid USPS Address	

Save **Cancel**

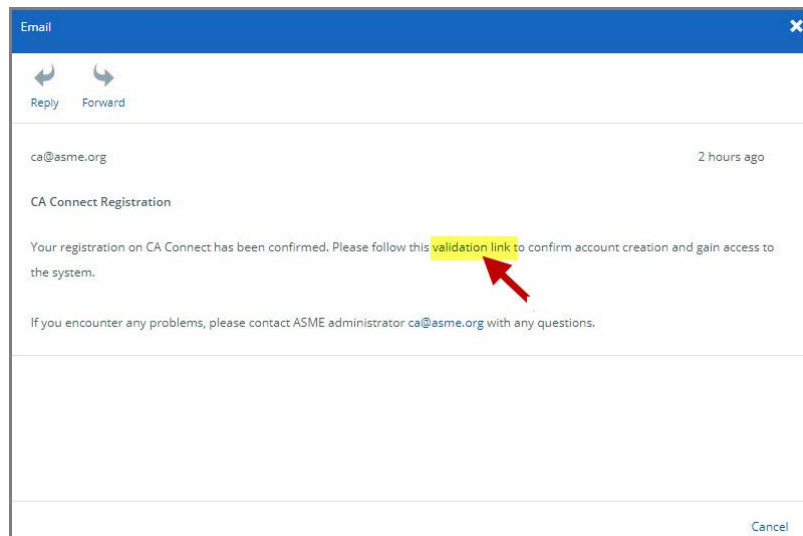
New Contact Email Verification

When you register as a New Contact for an organization, a validation email message is automatically sent to your registered email address. It contains a link used to validate the new account and email address. This also applies for Trusted Contacts accounts that are created by the Primary Contact of the organization.

1. CA Connect will display the **Contact Registration** page which contains a validation email message. This message is sent to your registered email address.



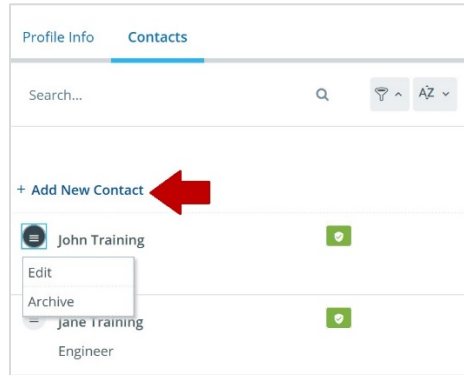
2. Locate and open the email that was sent to you.
3. Click the validation link contained in the email to authenticate your account.
4. Once you validate your email address, return to CA Connect and [login as a registered contact](#).



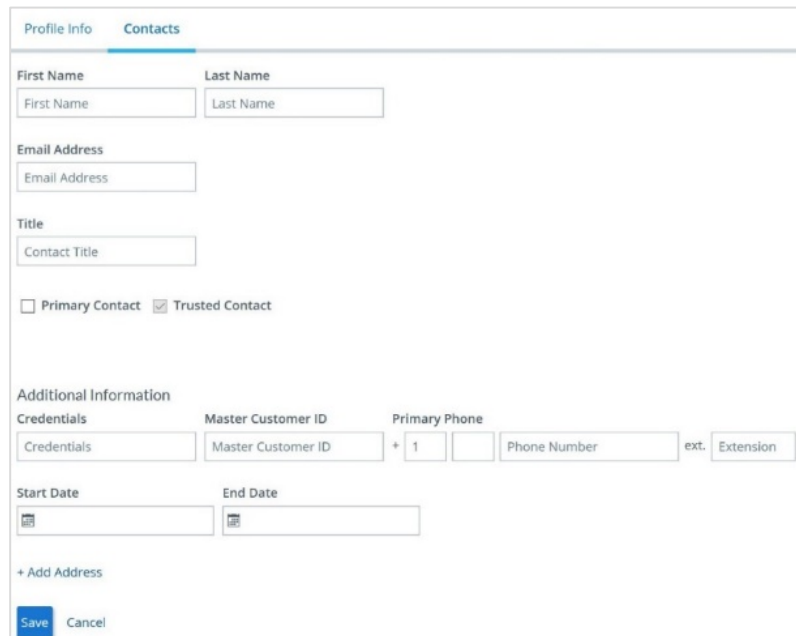
Create New Trusted Contact Account

The Primary Contact can create an account for a user associated with the organization to have access to CA Connect and the Company Account as trusted contact.

1. Select the Profile tab.
2. Click on the Contacts link.



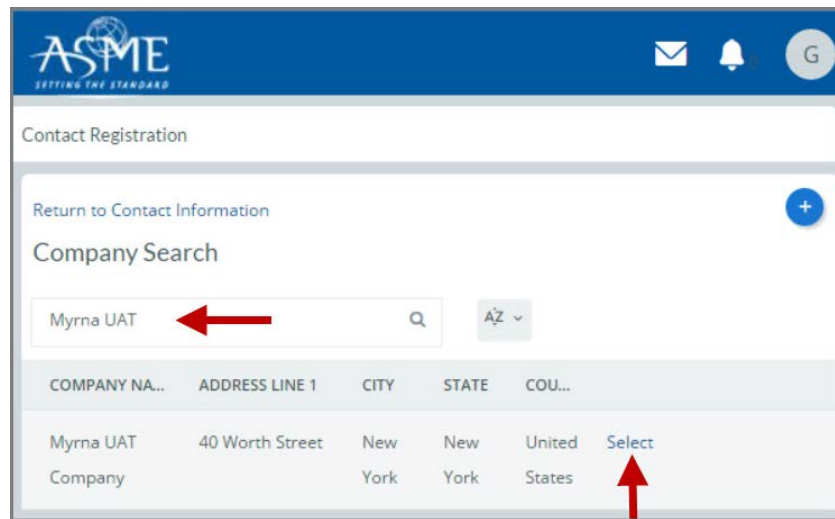
3. Select the **+ Add New Contact** link.
4. Enter the information in the designated fields for the new trusted contact form. Required fields include:
 - First name
 - Last name
 - Email address
 - Primary phone
5. The checkbox for Trusted Contact should be automatically checked.
6. Click **Save**.
7. The new contact will appear on the list of company contacts.

A screenshot of the 'Add New Contact' form. The form is titled 'Profile Info' and 'Contacts'. It contains several input fields: 'First Name' and 'Last Name' (both labeled 'First Name' and 'Last Name' respectively), 'Email Address' (labeled 'Email Address'), and 'Title' (labeled 'Contact Title'). There are two checkboxes: 'Primary Contact' (unchecked) and 'Trusted Contact' (checked). Below these is a section for 'Additional Information' with three columns: 'Credentials' (labeled 'Credentials'), 'Master Customer ID' (labeled 'Master Customer ID'), and 'Primary Phone' (labeled 'Phone Number'). The 'Primary Phone' field has a '+ 1' prefix and an 'ext.' field labeled 'Extension'. At the bottom, there are 'Start Date' and 'End Date' fields, both with calendar icons. There is also a '+ Add Address' link and 'Save' and 'Cancel' buttons at the very bottom.

Create New Contact – Associate to Existing Company

If you are **not a registered user** of CA Connect and are creating a new Primary Contact account to associate with an already established company account, follow the steps listed below.

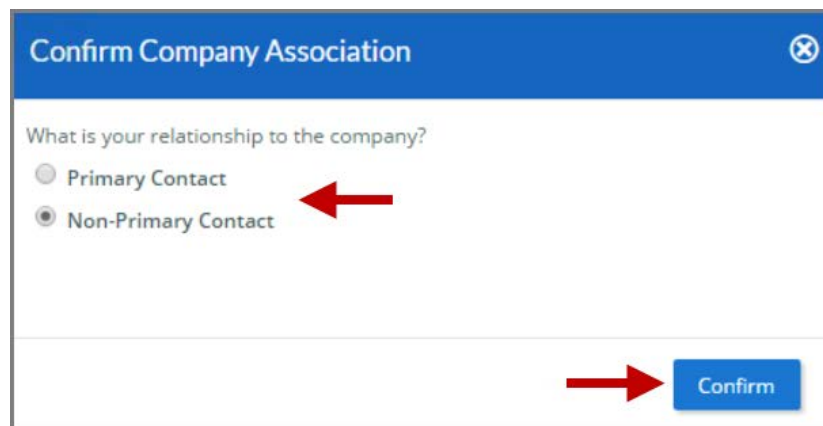
1. Create a new contact account (see **Create New Primary Contact Account**).
2. When done, return here to the next step.
3. On the **Company Search** page, enter the full or partial Company name in **Search** textbox.
4. Click the **Search** icon to begin the search.
5. The **Company** will appear in the **Search Results**.
6. Hover over the Company Name.
7. Click the **Select** link that appears.



The screenshot shows the ASME Contact Registration interface. At the top, there is a blue header with the ASME logo and navigation icons. Below the header, the page title is 'Contact Registration'. A 'Return to Contact Information' link with a plus icon is visible. The main section is 'Company Search', which includes a search input field containing 'Myrna UAT' and a search icon. Below the search field is a table of search results. The first row shows 'Myrna UAT' with address '40 Worth Street', city 'New York', state 'New York', and country 'United States'. A 'Select' link is visible to the right of the first row, highlighted with a red arrow.

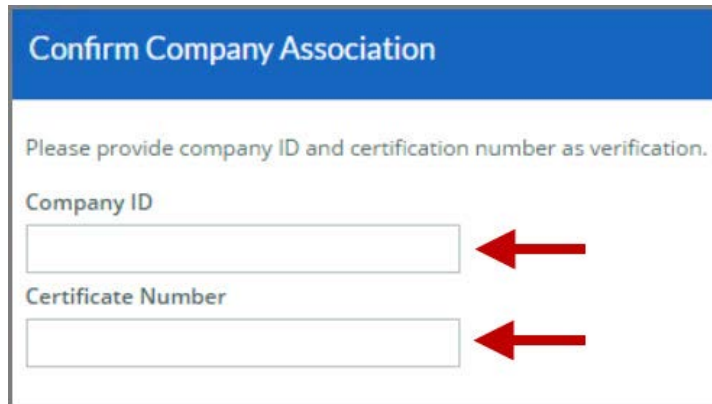
COMPANY NA...	ADDRESS LINE 1	CITY	STATE	COU...	
Myrna UAT	40 Worth Street	New York	New York	United States	Select

8. The **Confirm Company Association** page is displayed which contains the question **What is your relationship to the company?** Two contact association options are provided for you to choose from.



The screenshot shows the 'Confirm Company Association' dialog box. It has a blue header with the title and a close icon. The main content area contains the question 'What is your relationship to the company?' followed by two radio button options: 'Primary Contact' and 'Non-Primary Contact'. The 'Non-Primary Contact' option is selected, indicated by a red arrow. At the bottom right, there is a blue 'Confirm' button, also indicated by a red arrow.

- a. Select the applicable contact relationship option.
 - i. If **Primary Contact** is selected, a second page is displayed requested that you **Please provide company ID and certification number as verification.**
 1. Enter the **Company ID.**
 2. Enter the **Certificate Number.**
 3. Click **Confirm** to continue.



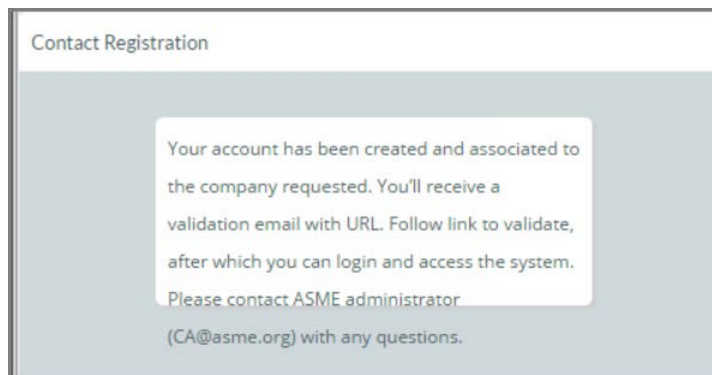
Confirm Company Association

Please provide company ID and certification number as verification.

Company ID

Certificate Number

4. CA Connect will display the Contact Registration page which contains a validation email message. This message is sent to your registered email address (see [New Contact Email Verification](#)) to continue.

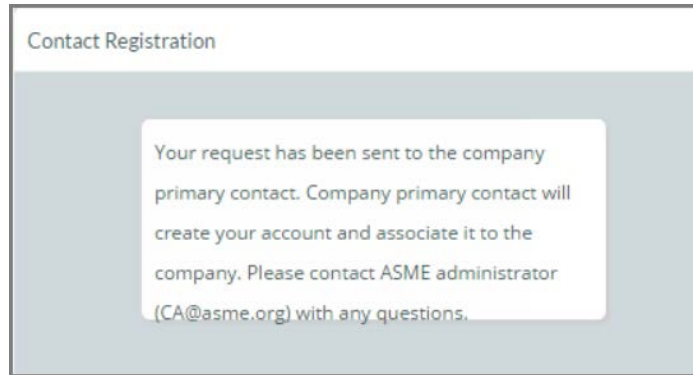


Contact Registration

Your account has been created and associated to the company requested. You'll receive a validation email with URL. Follow link to validate, after which you can login and access the system.

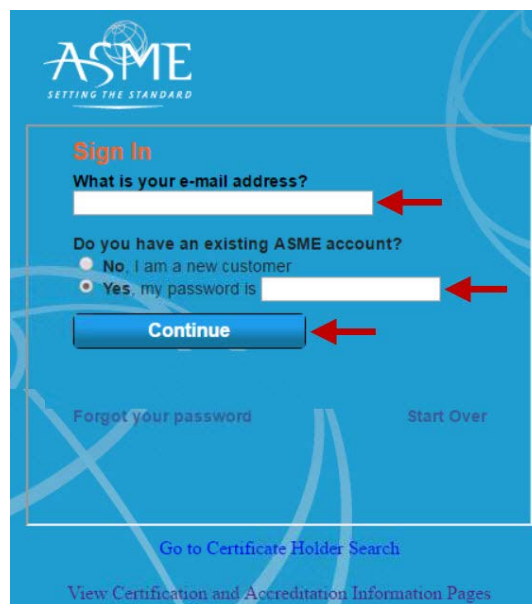
Please contact ASME administrator
(CA@asme.org) with any questions.

- ii. If **Non-Primary Contact** is selected, click **Confirm** to continue.
 1. CA Connect will display the Contact Registration page which contains a validation email message. This message is sent to your registered email address (see **New Contact Email Verification**) to continue.



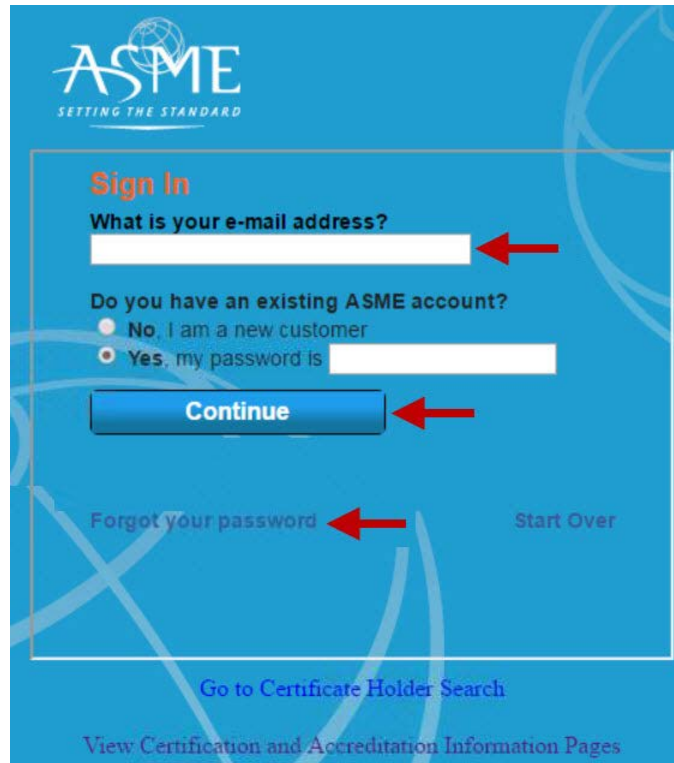
Log in As Registered Contact

1. Open your browser and enter **CACONNECT.ASME.ORG** in the address bar.
2. Enter your email address.
3. Select **Yes, my password is** and enter your password.
4. Click **Continue**.
5. You will be directed to the Company Dashboard.



Forgot / Change your Password

1. Enter your email address registered in CA Connect on the **Sign In** page.
2. Click **Forgot your password**.
3. Follow the instructions for resetting your password.



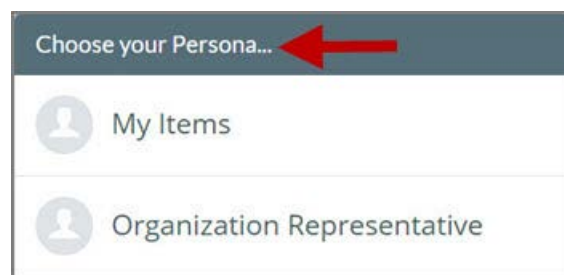
The screenshot shows the ASME Sign In page. At the top left is the ASME logo with the tagline "SETTING THE STANDARD". The main content area is titled "Sign In" and contains the following elements:

- A text input field labeled "What is your e-mail address?" with a red arrow pointing to it.
- A question "Do you have an existing ASME account?" with two radio button options:
 - No, I am a new customer
 - Yes, my password is [password input field]
- A blue "Continue" button with a red arrow pointing to it.
- A link "Forgot your password" with a red arrow pointing to it.
- A link "Start Over" to the right of the "Forgot your password" link.

At the bottom of the page, there are two links: "Go to Certificate Holder Search" and "View Certification and Accreditation Information Pages".

Choose Your Persona

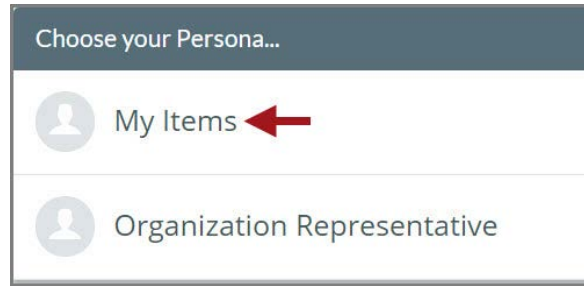
For **contacts only**, after you log into CA Connect you will be led to the **Choose your Persona** window for you to first select where you want to be directed to. The Company, however, will be directed to their [Company Dashboard](#).



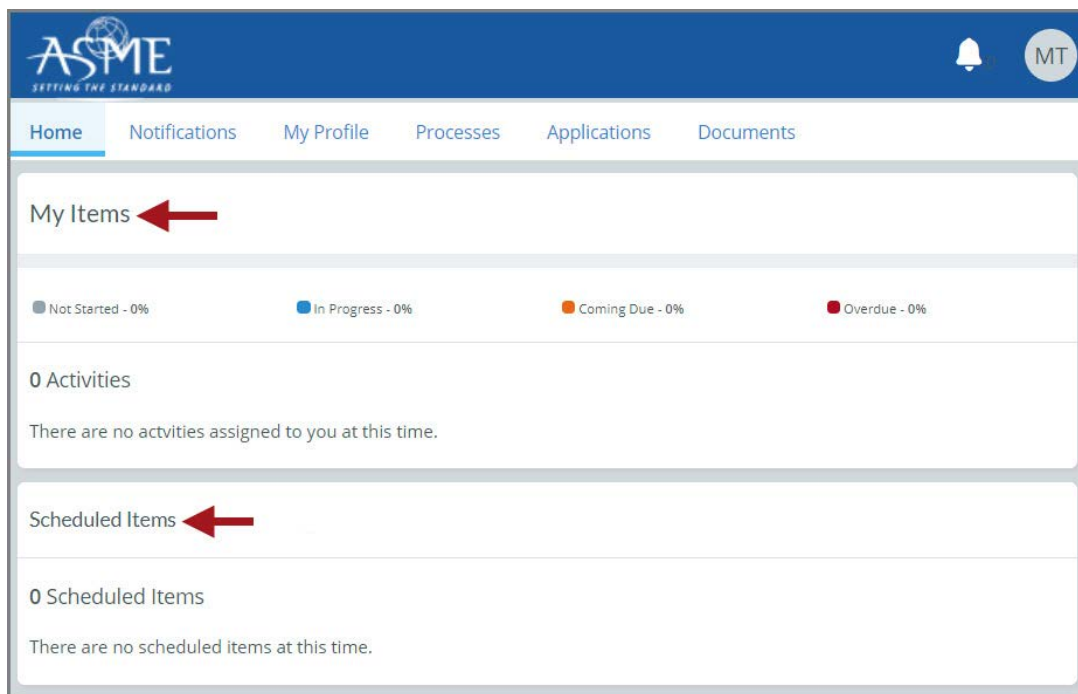
The screenshot shows a dropdown menu titled "Choose your Persona...". The menu has a dark grey header with the title and a red arrow pointing to it. Below the header are two options, each with a person icon:

- My Items
- Organization Representative

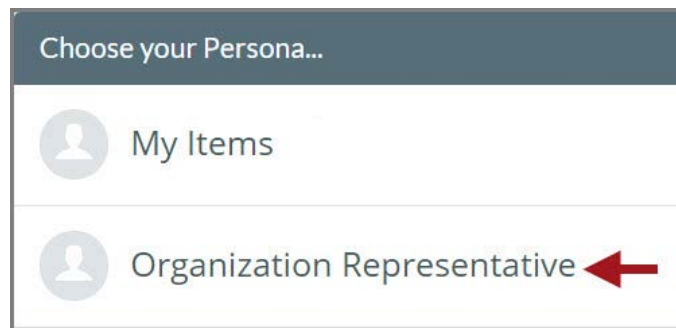
The **My Items** selection provides you with a list of the Contact's activities and scheduled items.



It will also provide access to your notifications, Profile, Processes, Applications, and documents that been uploaded (see **My Items** illustration).

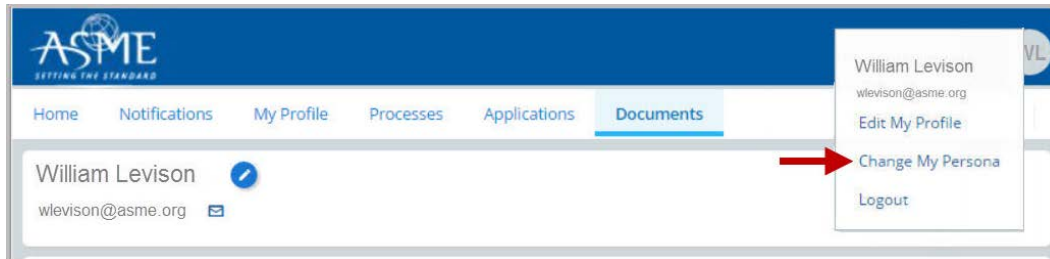


The **Organization Representative** selection will direct you to the **Company Dashboard** which provides you with all related Company related events and activities pertaining to application for certification.



To toggle between one Persona to another

1. Click the **blue icon** on the far right hand side of the page.
2. Select the **Change My Persona** link.



Company Dashboard

The CA Connect Dashboard serve as the hub to create and manage information about your company, contacts, and application(s). The Dashboard allows you to move throughout the system using the links in the top navigation bar.

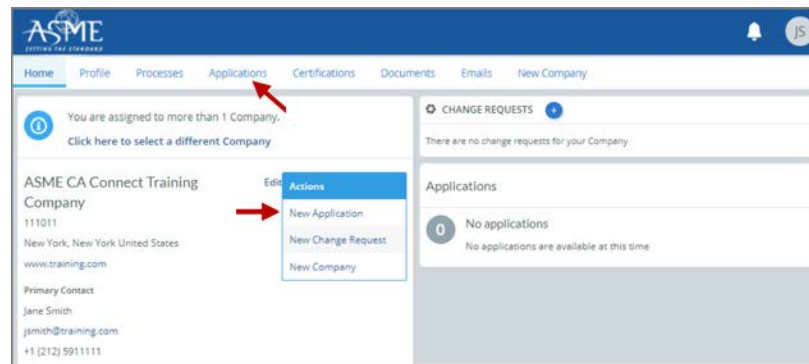
- Home:** Serves as the main page of the CA Connect. It provides a starting point with many elements and directions for the user to interact with the system, obtain information they are seeking, and conduct Conformity Assessment accreditation/certification application and certification issuance and processes.
- My Profile:** Displays various elements of the Company and Primary Contact Profile data such as Company Name, Location, Program related details, contact information. It allows the Primary Contact to add trusted contact also associated with the company.
- Processes:** Shows a list of work-in-progress and completed processes pertaining to a pending and/or active application for certification.
- Applications:** Presents a list of pending and active applications and their status.
- Certifications:** Directs you to the Certifications page where all related certificate details can be obtained.
- Documents:** Houses documents that have been uploaded.
- Emails:** Retains email notifications sent from CA Connect that are related to specific tasks.
- New Company:** Allows the ability to create a new company record directly from the Company Dashboard.

Create New Application

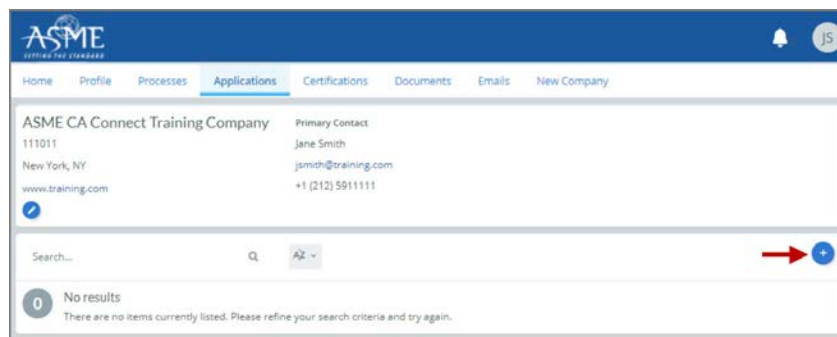
AIA Program – New Application

The information required to complete and submit an application for certification / accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile**, **Certifications**, **Stamps**, **Travel**, **Billing**, and **Review**. Each tab consists of specific application details and downloading/uploading of files that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

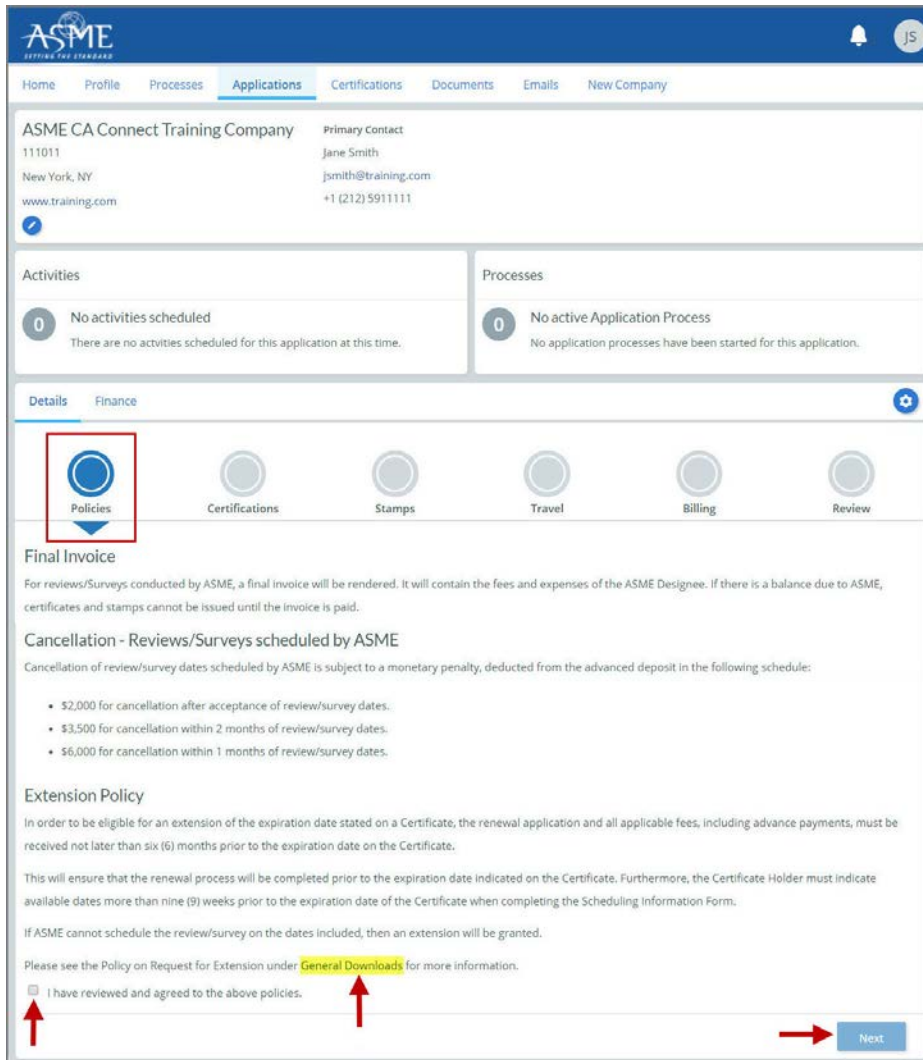
1. To begin the process of applying for certification, you must be logged into CA Connect as the company's Primary Contact.
2. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.



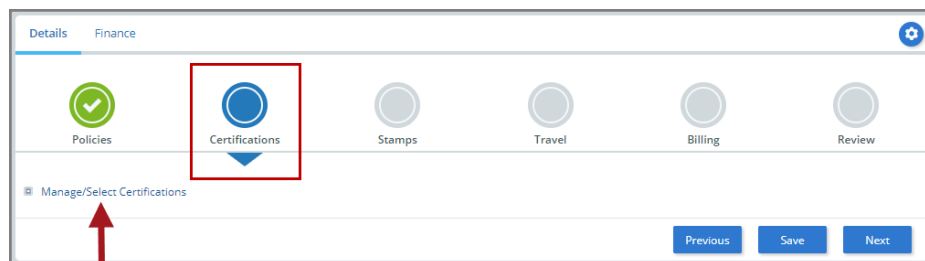
3. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.



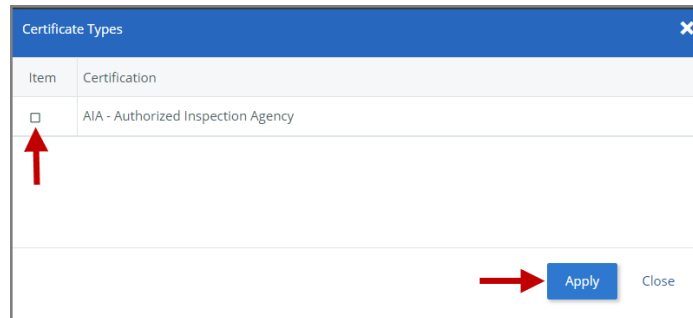
4. The first application tab is the **Policies tab**. Review all information displayed on the tab.
5. Scroll down the page to the **Extension Policy** section.
6. If you want to see the policy relating to a Request for Extension, select the **General Downloadable Resources** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
7. Check **I have reviewed and agreed to the above policies** checkbox.
8. Click **Next** to continue.



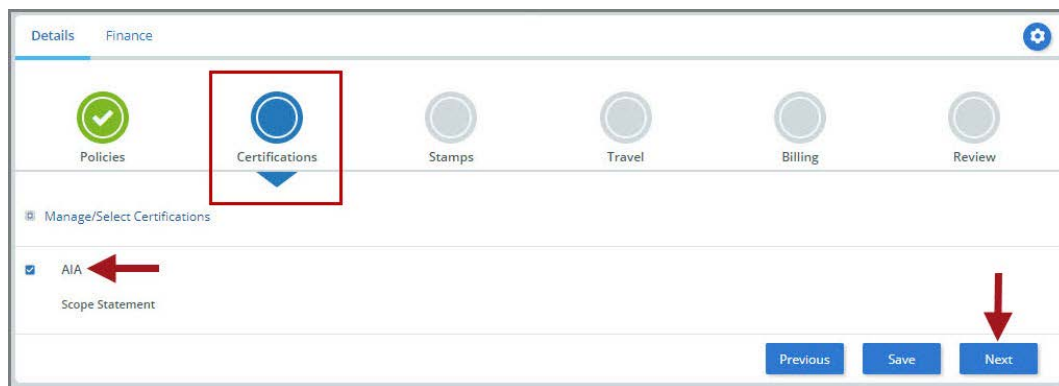
9. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications** tab.
10. Click the **Manage/Select Certifications** link or checkbox.



11. The Certificate Types form is displayed. Select the AIA certificate type.
12. When done, click **Apply** to continue.



13. The AIA Certificate Type will be added to the Certifications tab. Click **Next** to continue.



14. The **Certifications** tab is updated to reflect a green checkmark. The application data processing will advance to the **Stamps tab**.
15. Select an **Authorized Inspection Agency** from the list of AIA Organizations by clicking on the down arrow. Select the Authorized Inspection Agency.
16. Click on the **Download Supplemental Form** link.
17. The **Supplemental Application Form** is downloaded to your local drive.
18. Complete the supplemental form.
19. Save the completed form on your local drive.
20. Click the **Upload Supplemental Form (PDF)** link.
21. Locate the completed supplemental form on your local drive and upload the form.
22. When done, click **Next** to continue.

23. The **Stamps** tab is updated to reflect a green checkmark. Your application process will advance to the **Travel** tab.
24. The **Company Name** is displayed as a link under the Location Name label. Click on the link.

25. The **Travel Recommendation Detail** form is presented.
26. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
27. You must enter the information for all required fields which are denoted with a red * asterisks.
28. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
29. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
30. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. []

Save

31. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
32. When done, click **Save** to continue.

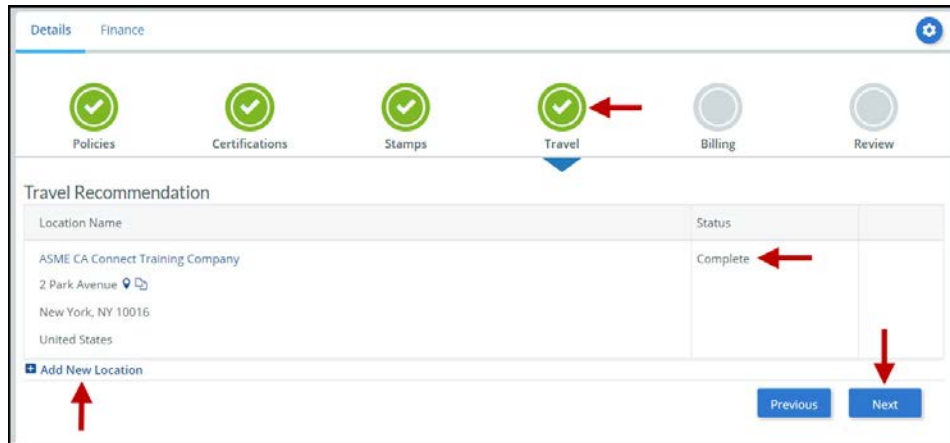
Please review the addresses below.

Hotel

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States
<input checked="" type="checkbox"/> Use Valid USPS Address	

Save Cancel

33. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
34. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
35. Confirm that the status for all locations is **Complete**, then click **Next** to continue.



36. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
37. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
38. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
39. When done, click **Next** to continue.

Details Finance

Policies Certifications Stamps Travel **Billing** Review

Billing
A retainer is billed to cover cost associated with the review/survey. Any left over remittance will be refunded.

Billing Address
Use Plant Address Use Mailing Address

Address Line 1
Address Line 1

Address Line 2
Address Line 2

Address Line 3
Address Line 3

Country
Select Country

City

Zip/Postal Code

Contact/Attention

Phone Number
+ ext.

Company Banking Details
Please provide the following information to allow ASME to refund any left over remittance.

Company Banking Details

Bank Account Name / Beneficiary

ABA Routing Number

Billing Contact Email

Account Number / IBAN #

SWIFT Code / BIC

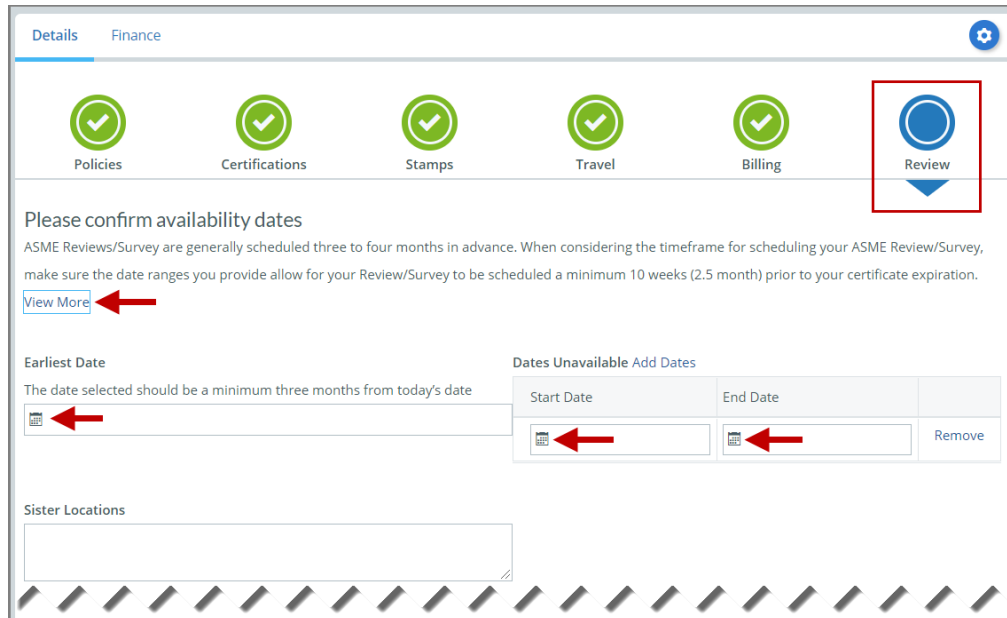
Bank Transit Number

Tax ID Number

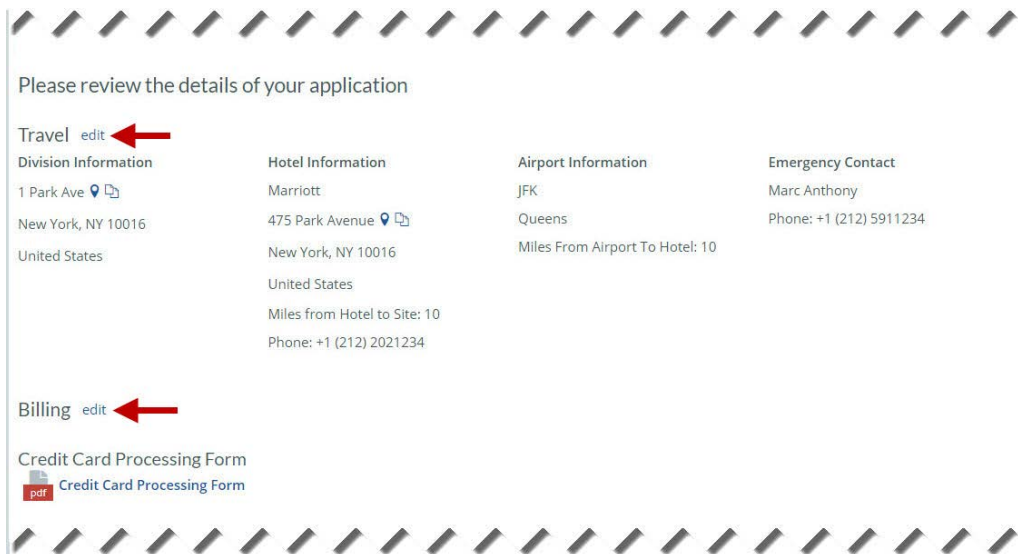
Credit Card Processing Form
Credit Card Processing Form

Previous Save **Next**

40. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
41. The **Review tab** displays a summary of the information that was entered in each of the tabs.
42. Click the **View More** link to display additional information on availability dates.
43. Enter the **Earliest Date** that your company will be available for the review. Please note the dates you enter must be a minimum of three months in the future.
44. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



45. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
46. Select the **Edit** links to modify any of the information you entered.
47. Click on the **Credit Card Processing Form** to download the form if needed.



48. Scroll down the tab and select the **Upload Company Manual** link. Locate the manual on your local computer and upload the file.
49. Select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.

50. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
51. Select the **Upload Agreement Form** link.
52. Locate the signed agreement form on your local computer and upload the file.
53. If you need to replace the agreement form that you uploaded, you can remove the agreement form and upload another agreement form.
54. Click **Save** to continue.

The screenshot shows a web form with the following sections:

- Banking Details:** Bank Name, ABA Routing Number, Account Number/IBAN #, Swift Code, Bank Transit Number, Bank Account Name, Tax ID Number, Contact/Attention Name: Contxxx, Contact/Attention Email.
- Billing Address:** 1 Park Ave, New York, NY 10016, United States.
- Upload Instructions:**
 - "Please upload your company manual" section with instructions and an "Upload Company Manual" button (indicated by a red arrow).
 - "Please print, sign and upload the Agreement Form" section with instructions and "Download Agreement Form" and "Upload Agreement Form" buttons (both indicated by red arrows).
- Navigation:** "Previous" and "Save" buttons at the bottom right, with a red arrow pointing to the "Save" button.

Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

IMPORTANT: This is the only opportunity you will have to alter any of the information prior to submission of the application. After the application is submitted, in order to make any changes, you will need to submit a change request to ASME.

This screenshot shows the bottom right corner of the form, highlighting the "Previous", "Save", and "Submit" buttons. A red arrow points directly to the "Submit" button.

55. You will be redirected to the **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.

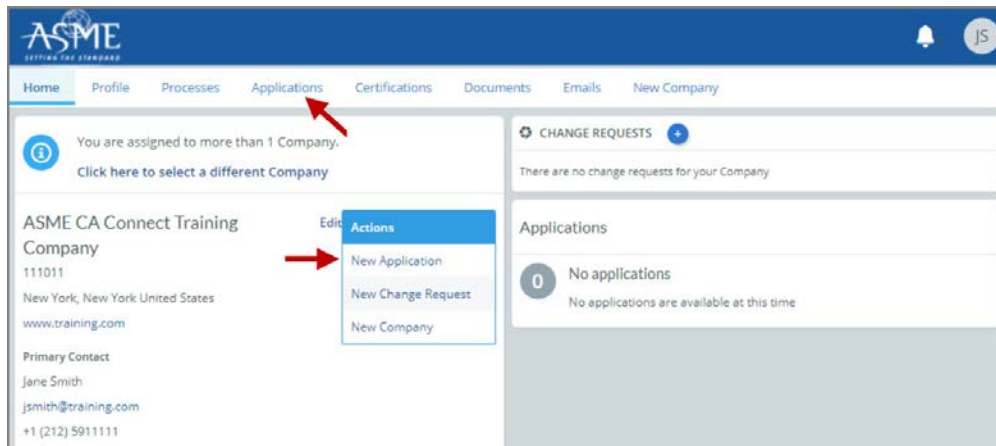
- Click the blue gear icon and select the **Print Document** link.



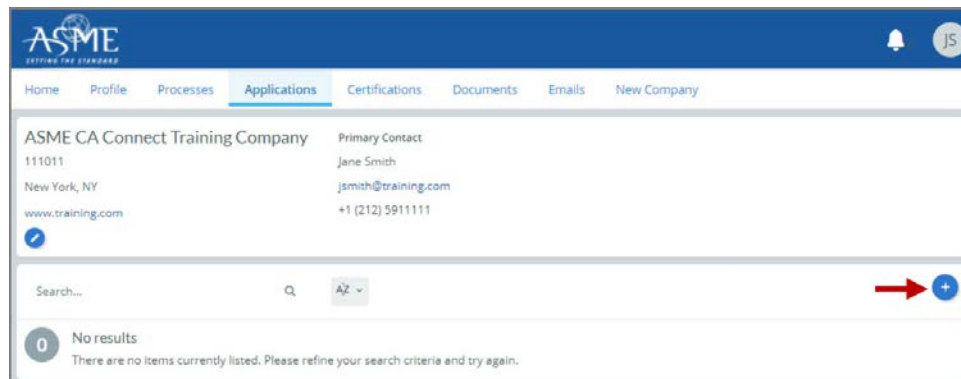
Boiler Program – New Application

The information required to complete and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile**, **Certifications**, **Stamps**, **Travel**, **Billing**, and **Review**. Each tab consists of specific application details and downloading/uploading of files that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

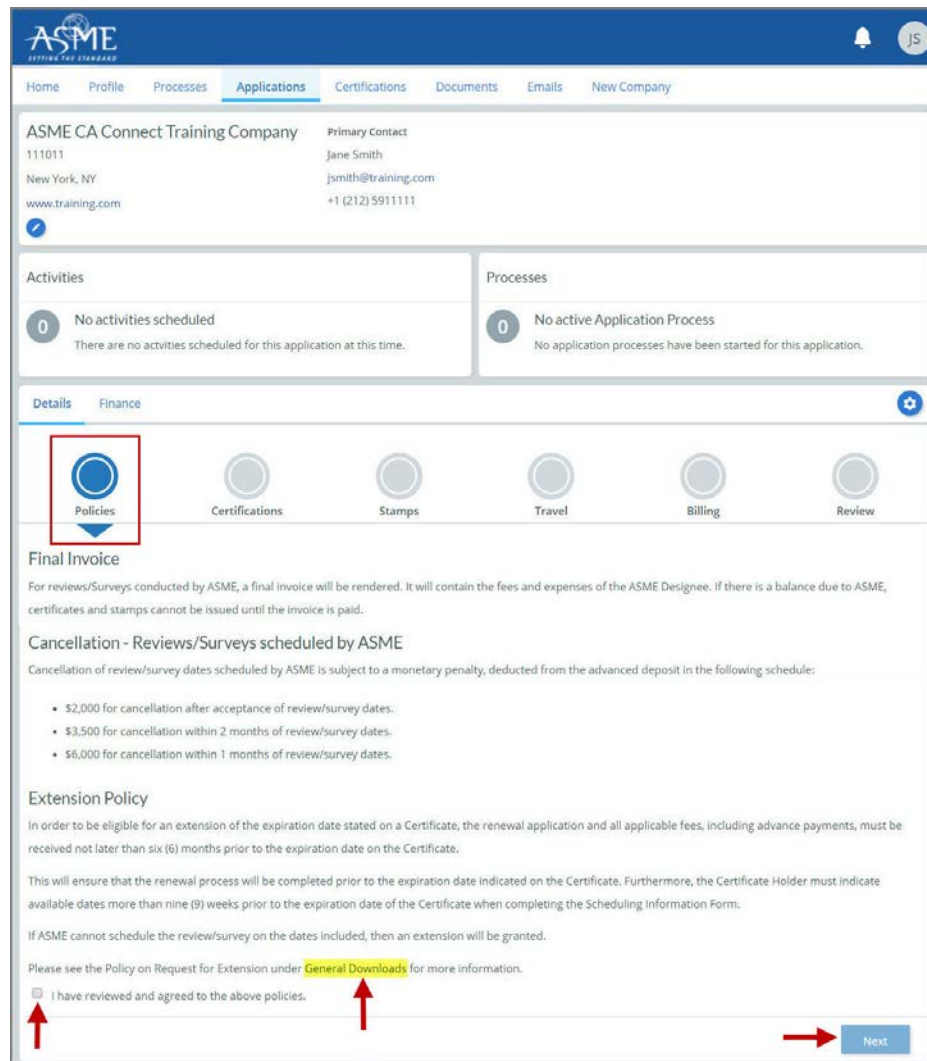
- To begin the process of applying for certification, you must be logged into CA Connect as the company's Primary Contact.
- Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.



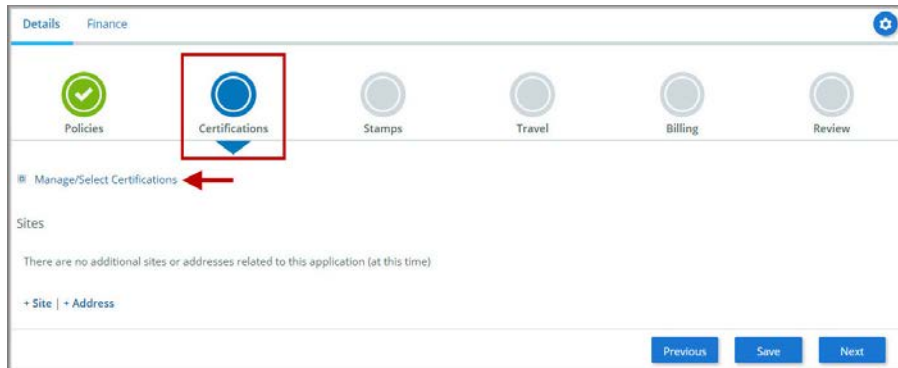
- On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.



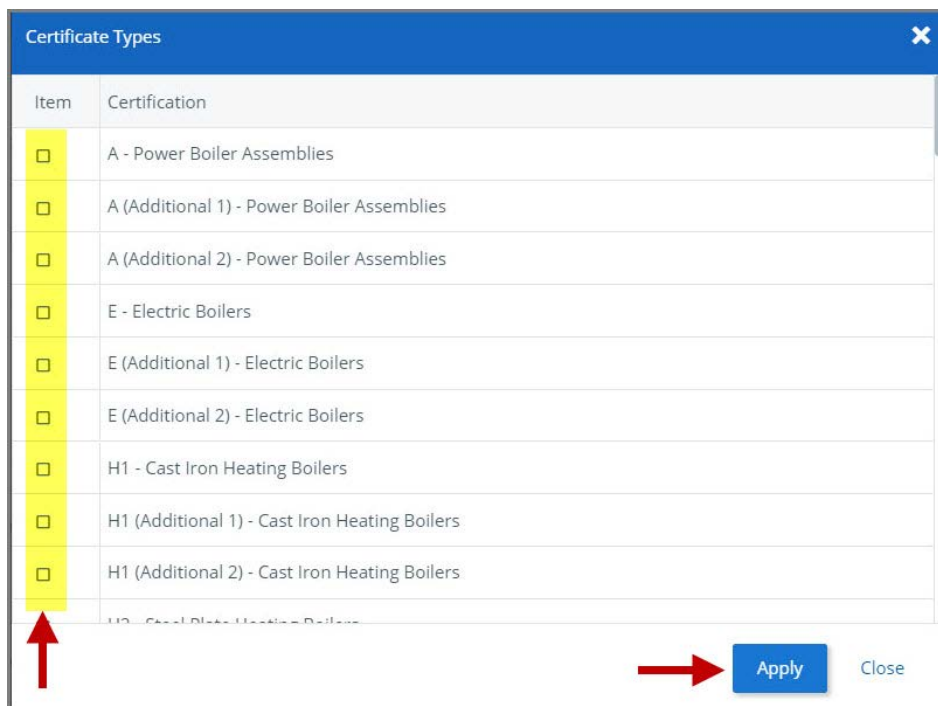
4. The first application tab is the **Policies tab**. Review all information displayed on the tab.
5. Scroll down the page to the **Extension Policy** section.
6. If you want to see the policy relating to a Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
7. Check **I have reviewed and agreed to the above policies** checkbox.
8. Click **Next** to continue.



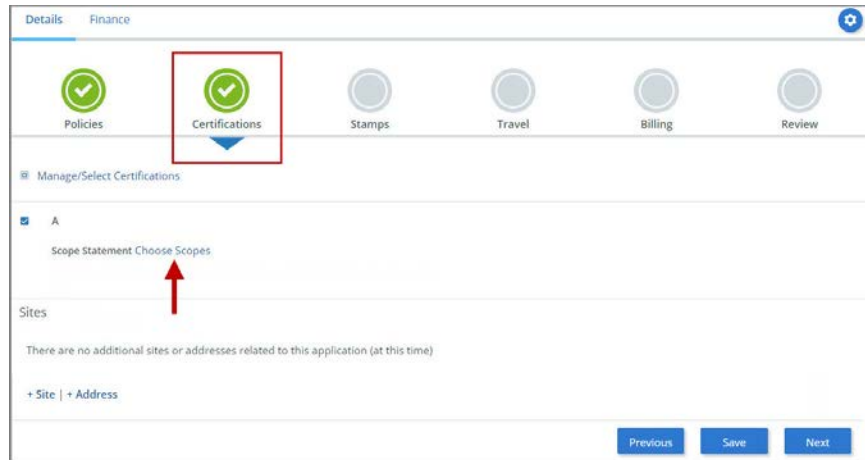
9. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications** tab.
10. Click the **Manage/Select Certifications** link or checkbox.



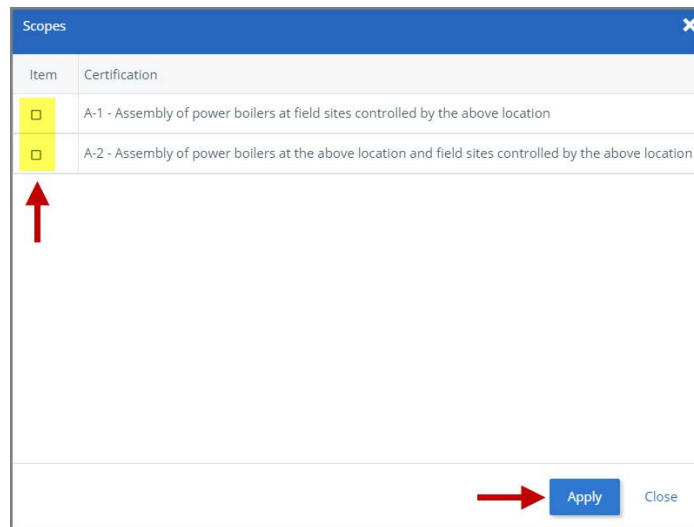
11. A list of Boiler Certificate Types is displayed. Select the certificate type(s) you are applying for.
12. When done, click **Apply** to continue.



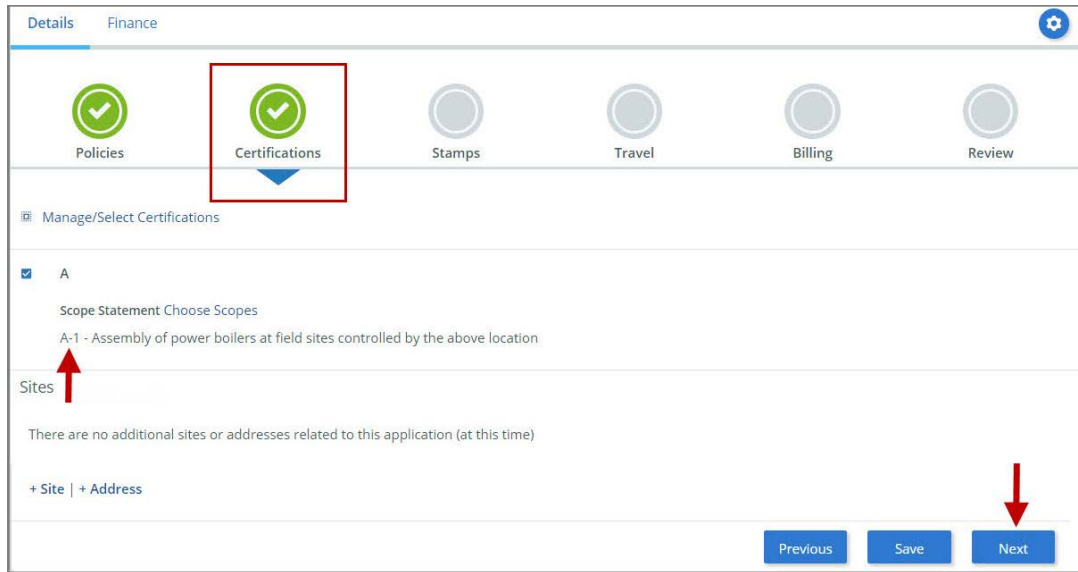
13. The Certificate Type(s) you selected will be added to the Certifications tab. For each certificate type you selected, click the **Choose Scopes** link to select the **Scope Statement**.



14. Relevant scopes will appear in the **Scopes** form. Select one or more scope statements applicable to the certificate type, then click **Apply** to continue.



15. The scopes you selected will be added in the **Scope Statement** section of the **Certifications** tab. Repeat these steps for each certificate type(s) you are applying for.
16. When done, click **Next** to continue.



17. The **Certifications** tab is updated to reflect a green checkmark. The application data processing will advance to the **Stamps tab**.

18. Select an **Authorized Seller** from the list by clicking on the down arrow.
 - a. To identify **ASME** as the Authorized Seller, select **Other** and **enter ASME**.
 - b. When proof of purchase cannot be located, upload the following statement which is to be signed, along with printed name and title, "I understand that if ASME cannot verify my purchase order for the required ASME codes and standards, ASME can and will withhold, suspend, or withdraw my certification."
19. Select an **Authorized Inspection Agency** from the list of AIA Organizations by clicking on the down arrow. Select the Authorized Inspection Agency.
20. Enter the **number of ASME Single Certification Marks** you like to receive.
21. Check each checkbox that applies to the certification. The **Stamp Confirmed by Applicant** checkbox is required.
22. When done, click **Next** to continue.

Details Finance

Policies Certifications **Stamps** Travel Billing Review

Program Type
Boiler

Authorized seller *
Select Seller

Do you hold an "R" Stamp with the National Board?
 Yes, I hold an "R" Stamp

To apply for a National Board "R" Certificate of Authorization, please check this box and contact the national Board of Boiler and Pressure Vessel Inspectors Accreditation Department at 1-614-888-8320 or visit their [website](#) to submit the "R" Stamp application.

Please be advised that if you are applying for both Boiler and Pressure Valve certifications, you will need to submit 2 separate applications, one for Boiler and one for Pressure Valve certifications. Submitting one application for both will result in processing delays. Thank you in advance for your compliance.

Authorized Inspection Agency *
Select AIA Organization

Stamp Selection *
NEW APPLICANTS: Indicate the number of ASME Single Certification Marks you would like to receive. Applicable fees, taxes and shipping charges will be assessed. Number of Marks requested.

1/2" 0

3/4" 0

Please check here if you perform work that will require low stress stamps.
 Stamps confirmed by applicant.

Previous Save **Next**

23. The **Stamps** tab is updated to reflect a green checkmark. The application data processing will advance to the **Travel tab**.
24. The **Company Name** is displayed as a link under the Location Name label. Click on the link.

The screenshot shows a web application interface with a top navigation bar containing tabs for 'Details' and 'Finance'. Below this is a progress indicator with six circular icons: 'Policies' (green checkmark), 'Certifications' (green checkmark), 'Stamps' (green checkmark), 'Travel' (blue circle with a downward arrow, highlighted with a red box), 'Billing' (grey circle), and 'Review' (grey circle). The main content area is titled 'Travel Recommendation' and contains a table with two columns: 'Location Name' and 'Status'. The table has one row with the following data:

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States <input type="button" value="Add New Location"/>	Not Complete

At the bottom of the table, there are 'Previous' and 'Next' buttons. A red arrow points to the company name link in the table row.

25. The **Travel Recommendation Detail** form is presented.
26. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
27. You must enter the information for all required fields which are denoted with a red * asterisks.
28. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
29. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.

30. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] ext. []

Fax
+ [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] ext. []

Save

31. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.

32. When done, click **Save** to continue.

Please review the addresses below.

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

[Save](#) [Cancel](#)

33. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
- If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
34. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
35. Confirm that the status for all locations is **Complete**, then click **Next** to continue.

Details Finance

Policies Certifications Stamps **Travel** Billing Review

Travel Recommendation

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Complete

[Add New Location](#)

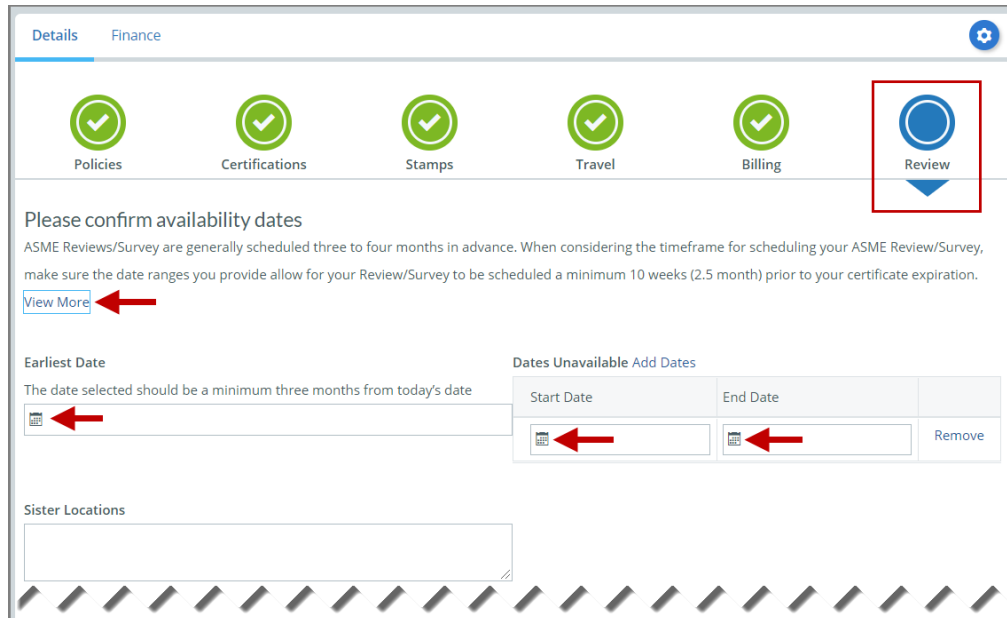
[Previous](#) [Next](#)

36. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
37. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
38. In the **Company Banking Details** section,

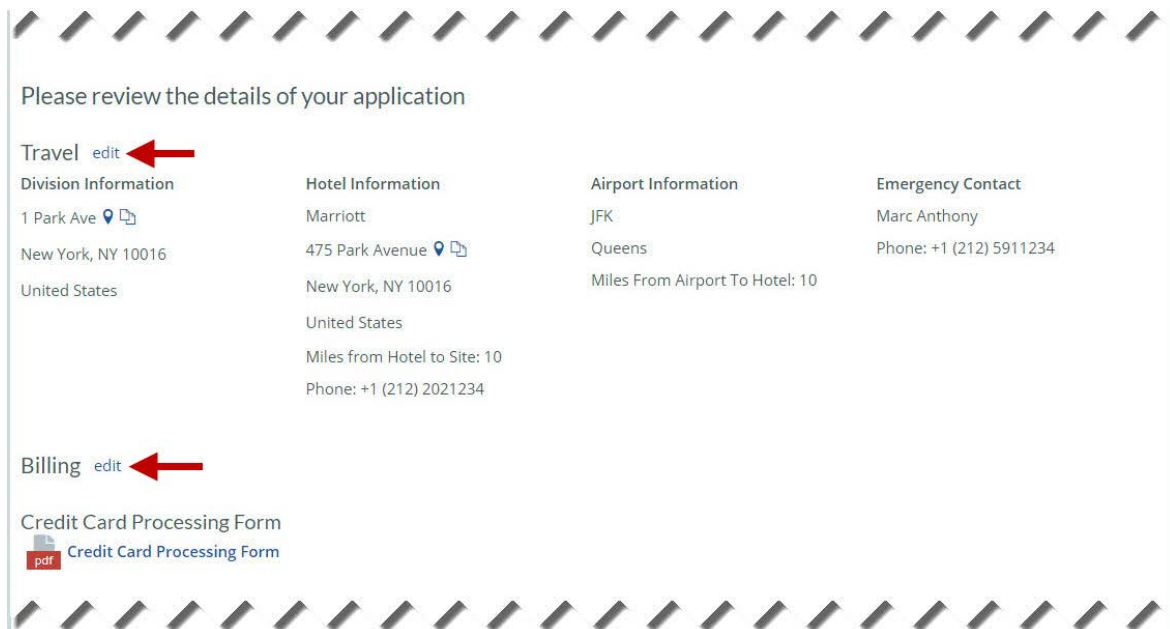
- a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
39. When done, click **Next** to continue.

The screenshot shows a web application interface with a top navigation bar containing tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The 'Billing' tab is active and highlighted with a red box and a green checkmark. Below the tabs, the 'Billing' section contains a sub-header 'Billing Address' with options for 'Use Plant Address' and 'Use Mailing Address'. There are input fields for Address Line 1, 2, and 3, a Country dropdown, City, Zip/Postal Code, Contact/Attention, and Phone Number. To the right, the 'Company Banking Details' section has a header with a red arrow pointing to it, followed by a text box and several input fields: Bank Account Name / Beneficiary, ABA Routing Number, Billing Contact Email, Account Number / IBAN #, SWIFT Code / BIC, Bank Transit Number, and Tax ID Number. At the bottom, there is a link for 'Credit Card Processing Form' with a PDF icon and a red arrow pointing to it, and three buttons: 'Previous', 'Save', and 'Next' with a red arrow pointing to the 'Next' button.

40. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
41. The **Review tab** displays a summary of the information that was entered in each of the tabs.
42. Click the **View More** link to display additional information on availability dates.
43. Enter the **Earliest Date** that your company will be available for the review. Please note the dates you enter must be a minimum of three months in the future.
44. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



45. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, you can return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
46. You can click the **Edit** links to modify any of the information you entered. This is the only opportunity you will have to alter any of the information prior to submission of the renewal application.
47. You can also download the **Credit Card Processing Form**.



48. Scroll down the tab and select the **Upload Company Manual** link. Locate the manual on your local computer and upload the file.
49. Select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.
50. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
51. Select the **Upload Agreement Form** link.
52. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
53. Click **Save** to continue.

Banking Details

Bank Name:

ABA Routing Number:

Account Number/IBAN #:

Swift Code:

Bank Transit Number:

Bank Account Name:

Tax ID Number:

Contact/Attention Name: Contxxx

Contact/Attention Email:

Billing Address

1 Park Ave

New York, NY 10016

United States

Please upload your company manual

Instructions: Upload your company manual via the upload box below.

Please upload only your Company Manual. No other forms should be submitted via this upload box.

Upload Company Manual

Please print, sign and upload the Agreement Form

Instructions: Please click the "Print Agreement" button, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it. Scan the signed form and save it as a pdf file on your computer. Finally, upload the scanned document via the upload box located below the "Print Agreement" button.

Please upload only your completed Print Agreement Form. No other forms should be submitted via this upload box.

Download Agreement Form

Upload Agreement Form

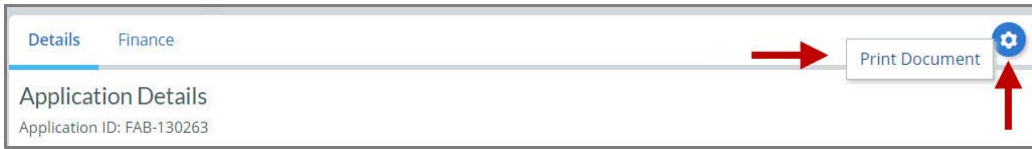
Previous Save

54. Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

Previous Save Submit

55. You will be redirected to the **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.

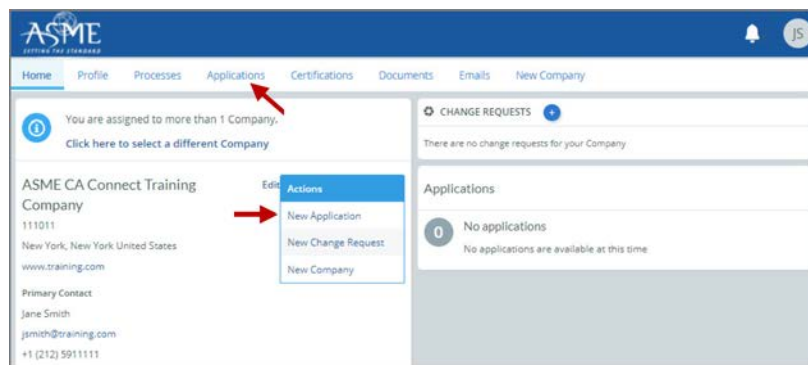
- Click the blue gear icon and select the **Print Document** link.



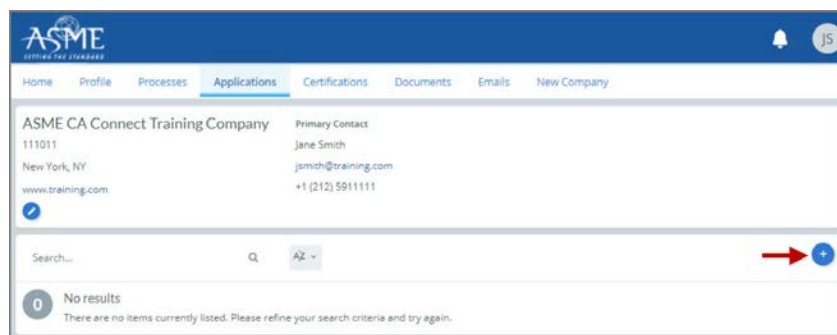
BPE Program – New Application

The information required to complete and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile**, **Certifications**, **Stamps**, **Travel**, **Billing**, and **Review**. Each tab consists of specific application details and downloading/uploading of files that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

- To begin the process of applying for certification, you must be logged into CA Connect as the company's Primary Contact.
- Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.



- On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.



- The first Application tab is the **Policies tab**. Review all information displayed on the tab.
- Scroll down the page to the **Extension Policy** section.
- If you want to see the policy relating to a Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.

- a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
7. Check **I have reviewed and agreed to the above policies** checkbox.

ASME
SETTING THE STANDARD

Home Profile Processes **Applications** Certifications Documents Emails New Company

ASME CA Connect Training Company
111011
New York, NY
www.training.com

Primary Contact
Jane Smith
jsmith@training.com
+1 (212) 5911111

Activities
0 No activities scheduled
There are no activities scheduled for this application at this time.

Processes
0 No active Application Process
No application processes have been started for this application.

Details Finance

Policies Certifications Stamps Travel Billing Review

Final Invoice
For reviews/Surveys conducted by ASME, a final invoice will be rendered. It will contain the fees and expenses of the ASME Designee. If there is a balance due to ASME, certificates and stamps cannot be issued until the invoice is paid.

Cancellation - Reviews/Surveys scheduled by ASME
Cancellation of review/survey dates scheduled by ASME is subject to a monetary penalty, deducted from the advanced deposit in the following schedule:

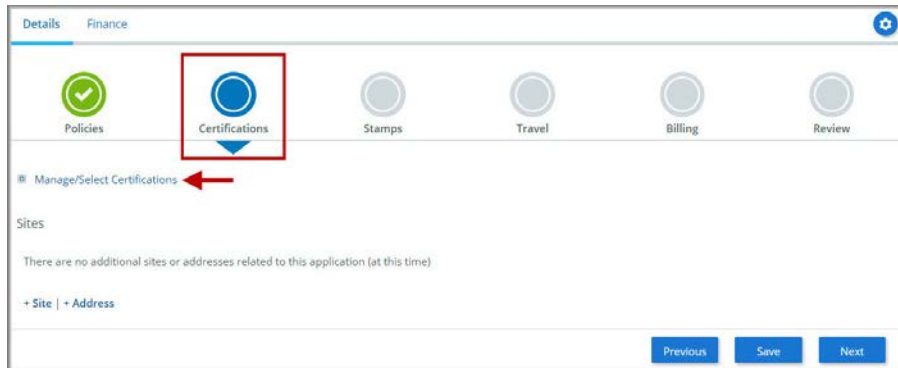
- \$2,000 for cancellation after acceptance of review/survey dates.
- \$3,500 for cancellation within 2 months of review/survey dates.
- \$6,000 for cancellation within 1 months of review/survey dates.

Extension Policy
In order to be eligible for an extension of the expiration date stated on a Certificate, the renewal application and all applicable fees, including advance payments, must be received not later than six (6) months prior to the expiration date on the Certificate.
This will ensure that the renewal process will be completed prior to the expiration date indicated on the Certificate. Furthermore, the Certificate Holder must indicate available dates more than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling Information Form.
If ASME cannot schedule the review/survey on the dates included, then an extension will be granted.
Please see the Policy on Request for Extension under [General Downloads](#) for more information.

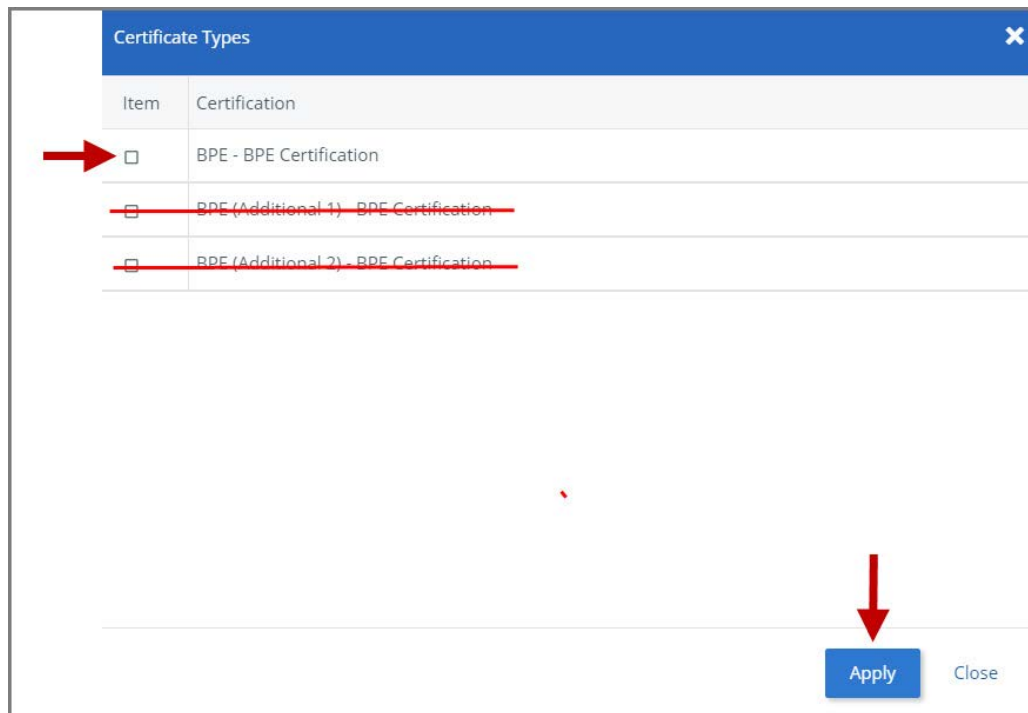
I have reviewed and agreed to the above policies.

Next

- The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications tab**.
- Click the **Manage/Select Certifications** link or checkbox.



- The Certificate Types form is displayed. Select the BPE certificate type.
- When done, click **Apply** to continue.



12. The BPE Certificate Type will be added to the Certifications tab. Click **Next** to continue.

The screenshot shows a web application interface with a top navigation bar containing 'Details' and 'Finance' tabs. Below this is a horizontal menu with six circular icons: Policies (green checkmark), Certifications (blue circle with down arrow, highlighted with a red box), Stamps (grey circle), Travel (grey circle), Billing (grey circle), and Review (grey circle). The main content area is titled 'Manage/Select Certifications' and contains a list of certification types. The 'BPE' checkbox is checked, and a red arrow points to it. Below this is a 'Scope Statement' field and a 'Sites' section with the text 'There are no additional sites or addresses related to this application (at this time)'. At the bottom right, there are three buttons: 'Previous', 'Save', and 'Next', with a red arrow pointing to the 'Next' button.

13. The **Certifications** tab is updated to reflect a green checkmark. The application data processing will advance to the **Stamps tab**.
14. Select an **Authorized Inspection Agency** from the list of AIA Organizations by clicking on the down arrow. Select the Authorized Inspection Agency.
15. Click on the **Download Supplemental Form** link.
16. The **Supplemental Application Form** is downloaded to your local drive.
17. Complete the supplemental form.
18. Save the completed supplemental form on your local drive.
19. Click the **Upload Supplemental Form (PDF)** link.
20. Locate the completed supplemental form on your local drive and upload the form.
21. When done, click **Next** to continue.

The screenshot shows the application interface after the previous step. The 'Policies' and 'Certifications' tabs now have green checkmarks. The 'Stamps' tab is highlighted with a red box. The main content area is titled 'Program Type' and shows 'BPE'. Below this is a section titled 'Upload Supplemental Form' with instructions: 'Please click the "Download Supplemental Form" button, then save it to your computer as a pdf file. Next, open the form, fill it out, and save the completed form to your computer as a pdf file. Please upload the completed form via the "Upload Supplemental Form" button located below the "Download Supplemental Form" button.' There are two links: 'Download Supplemental Form' and 'Upload Supplemental Form (PDF)', both highlighted with red arrows. At the bottom right, there are three buttons: 'Previous', 'Save', and 'Next', with a red arrow pointing to the 'Next' button.

22. The **Stamps** tab is updated to reflect a green checkmark. The application data processing will advance to the **Travel tab**.
23. The **Company Name** is displayed as a link under the Location Name label. Click on the link.

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Not Complete

24. The **Travel Recommendation Detail** form is presented.
25. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
26. You must enter the information for all required fields which are denoted with a red * asterisks.
27. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
28. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
29. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. [] []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. [] []

Save

30. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.

31. When done, click **Save** to continue.

Please review the addresses below.

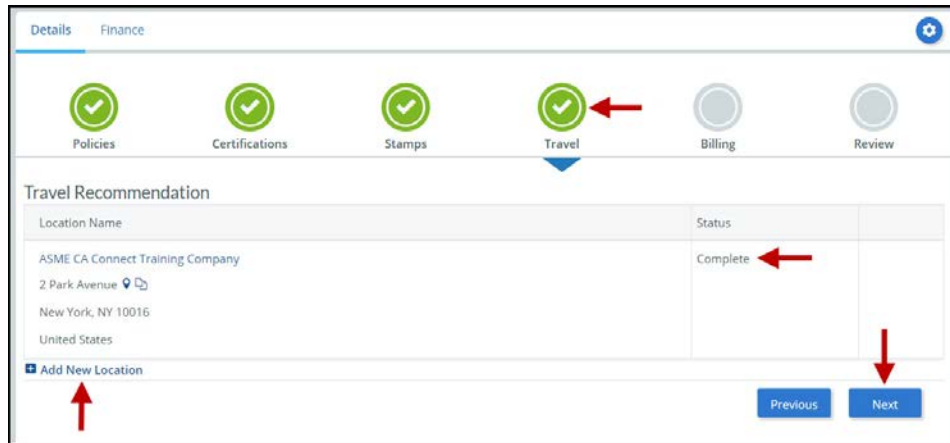
Hotel

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

Save Cancel

32. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
33. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
34. Confirm that the status for all locations is **Complete** then click **Next** to continue.

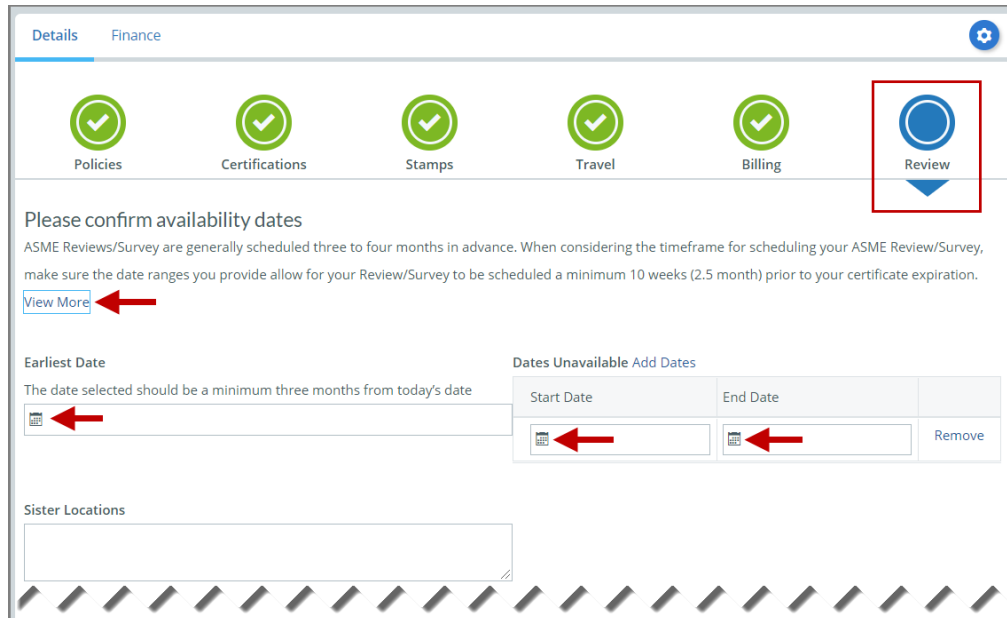


35. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
36. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.

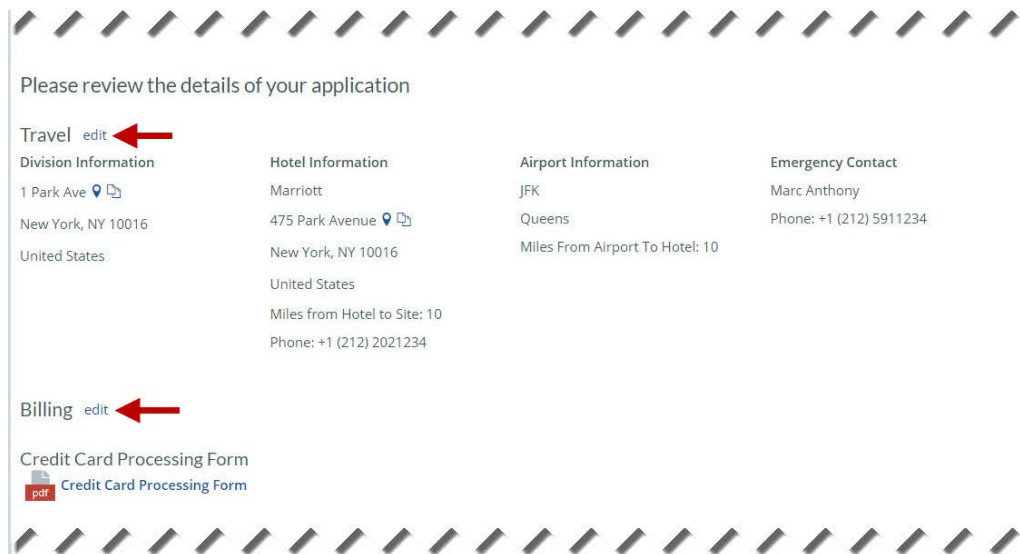
37. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
38. When done, click **Next** to continue.

The screenshot shows a web application interface with a navigation bar at the top containing tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The Billing tab is currently active and highlighted with a red box and a red arrow. Below the navigation bar, the Billing section contains a heading and a sub-heading. The Billing Address section has radio buttons for 'Use Plant Address' and 'Use Mailing Address', followed by input fields for Address Line 1, 2, and 3, a Country dropdown, City, Zip/Postal Code, Contact/Attention, and Phone Number. The Company Banking Details section has a heading, a sub-heading, and several input fields: Company Banking Details, Bank Account Name / Beneficiary, ABA Routing Number, Billing Contact Email, Account Number / IBAN #, SWIFT Code / BIC, Bank Transit Number, and Tax ID Number. At the bottom of the form, there is a link to download the 'Credit Card Processing Form' with a PDF icon, highlighted with a red arrow. At the very bottom, there are three buttons: 'Previous', 'Save', and 'Next', with the 'Next' button highlighted by a red arrow.

39. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
40. The **Review tab** displays a summary of the information that was entered in each of the tabs.
41. Click the **View More** link to display additional information on availability dates.
42. Enter the **Earliest Date** that your company will be available for the review. Please note the dates you enter must be a minimum of three months in the future.
43. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



44. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
45. Select the **Edit** links to modify any of the information you entered.
46. Click on the **Credit Card Processing Form** to download the form if needed.



47. Scroll down the tab and select the **Upload Company Manual** link. Locate the manual on your local computer and upload the file.
48. Select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.

49. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
50. Select the **Upload Agreement Form** link.
51. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
52. Click **Save** to continue.

The screenshot shows a web form with two columns of input fields. The left column is titled 'Banking Details' and includes fields for Bank Name, ABA Routing Number, Account Number/IBAN #, Swift Code, Bank Transit Number, Bank Account Name, Tax ID Number, Contact/Attention Name, and Contact/Attention Email. The right column is titled 'Billing Address' and includes fields for address (1 Park Ave), city/state (New York, NY 10016), and country (United States). Below the fields, there are two instruction sections. The first section is titled 'Please upload your company manual' and includes an 'Upload Company Manual' button with a red arrow pointing to it. The second section is titled 'Please print, sign and upload the Agreement Form' and includes a 'Download Agreement Form' button and an 'Upload Agreement Form' button, both with red arrows pointing to them. At the bottom right of the form, there are two buttons: 'Previous' and 'Save', with a red arrow pointing to the 'Save' button.

Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

IMPORTANT: This is the only opportunity you will have to alter any of the information prior to submission of the application. After the application is submitted, in order to make any changes, you will need to submit a change request to ASME.

The screenshot shows a web form with three buttons at the bottom right: 'Previous', 'Save', and 'Submit'. A red arrow points to the 'Submit' button.

53. You will be redirected to the **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.

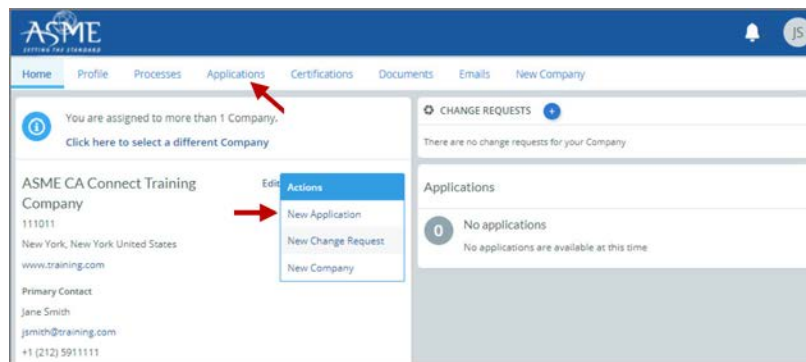
54. Click the blue gear icon and select the **Print Document** link.



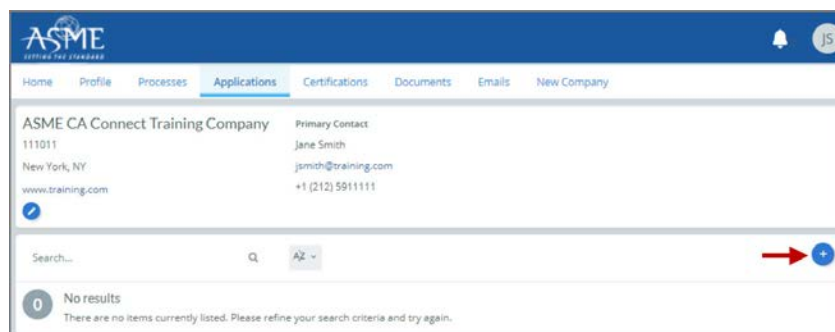
NQA Program – New Application

The information required to complete and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile**, **Certifications**, **Stamps**, **Travel**, **Billing**, and **Review**. Each tab consists of specific application details and downloading/uploading of files that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

1. To begin the process of applying for certification, you must be logged into CA Connect as the company's Primary Contact.
2. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.

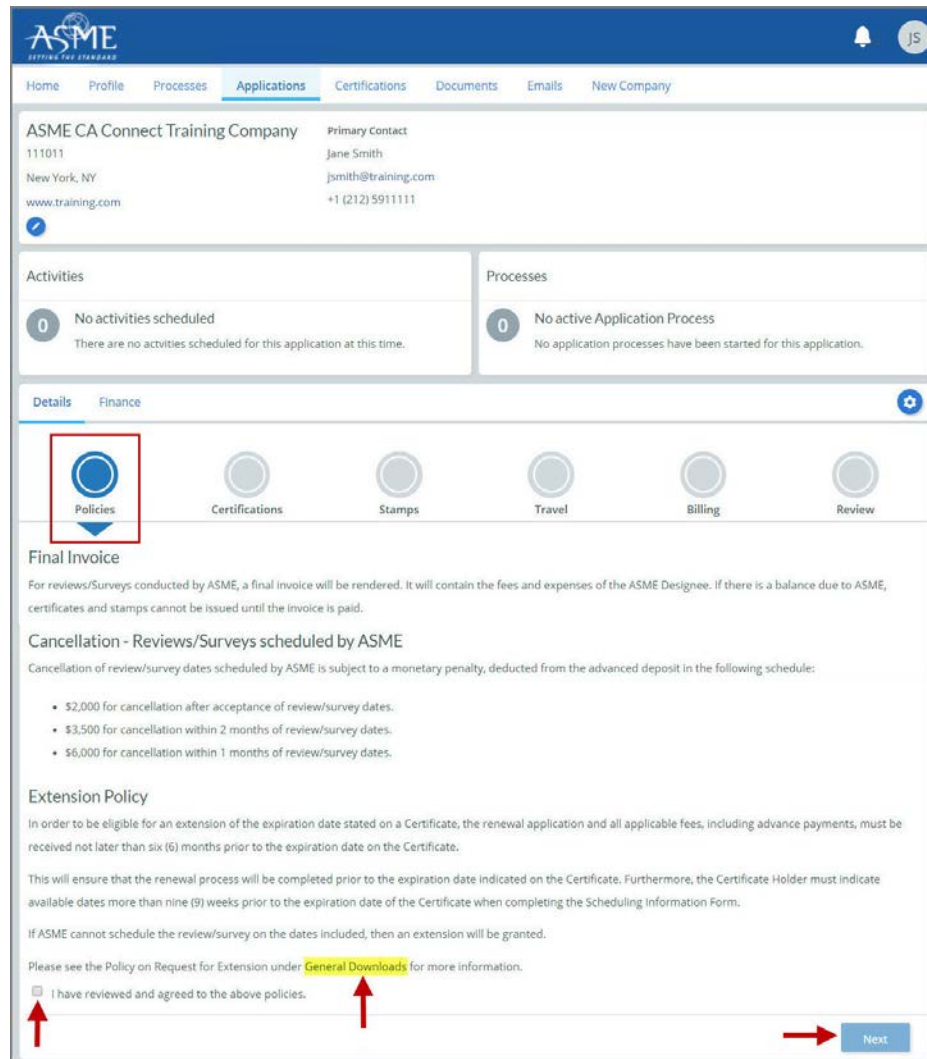


3. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.



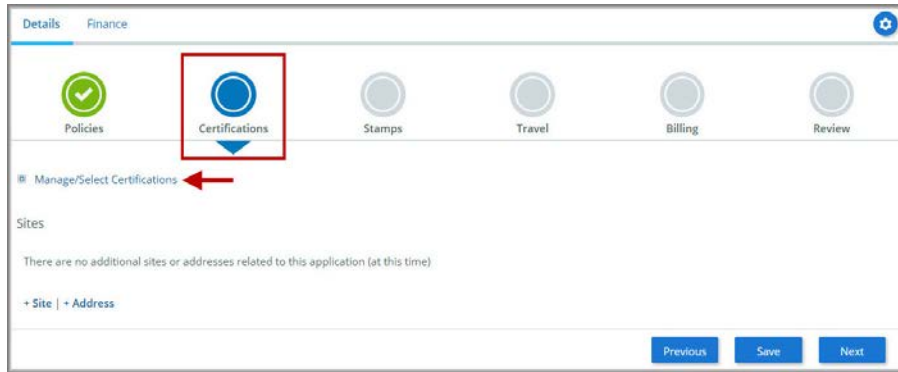
4. The first Application tab is the **Policies** tab. Review all information displayed on the tab.
5. Scroll down the page to the **Extension Policy** section.

6. If you want to see the policy relating to a Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
7. Check **I have reviewed and agreed to the above policies** checkbox.



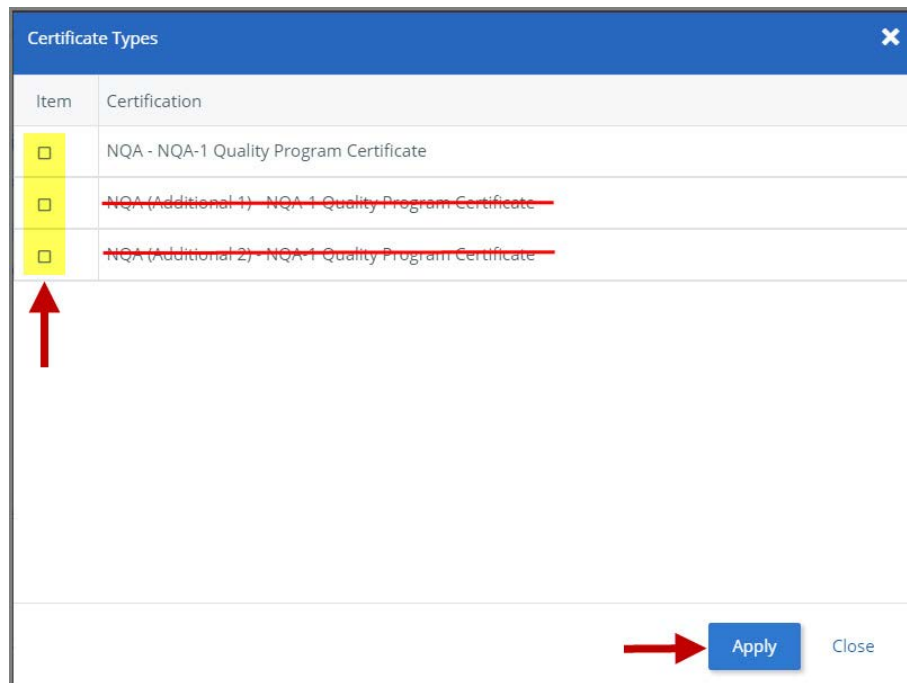
8. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications tab**.

9. Click the **Manage/Select Certifications** link or checkbox.

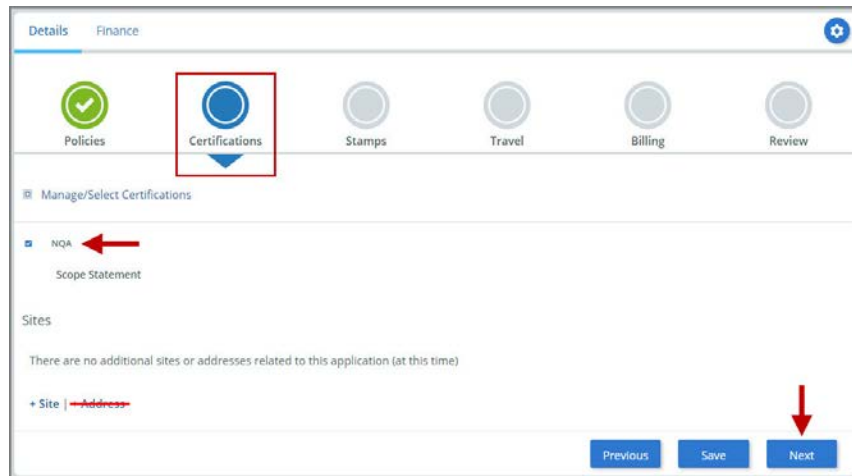


10. The Certificate Types form is displayed. Select the NQA certificate type.

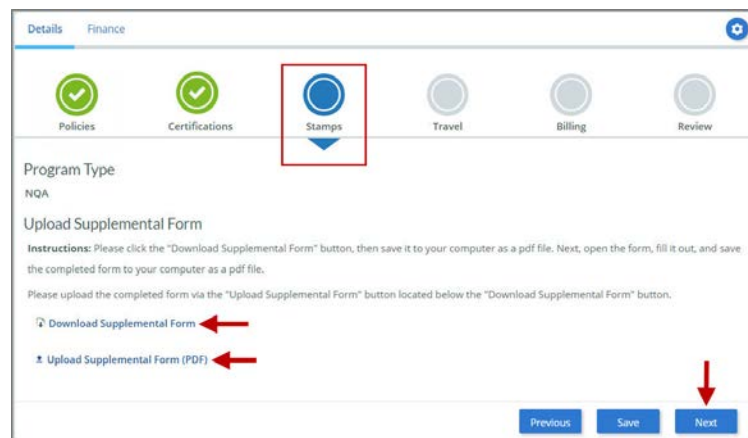
11. When done, click **Apply** to continue.



12. The NQA Certificate Type will be added to the Certifications tab. Click **Next** to continue.



13. The **Certifications** tab is updated to reflect a green checkmark. The application data processing will advance to the **Stamps** tab.
14. Click on the **Download Supplemental Form** link.
15. The **Supplemental Application Form** is downloaded to your local drive.
16. Complete the supplemental form.
17. Save the completed form on your local drive.
18. Click the **Upload Supplemental Form (PDF)** link.
19. Locate the completed supplemental form on your local drive and upload the form.
20. When done, click **Next** to continue.



21. The **Stamps** tab is updated to reflect a green checkmark. The application data processing will advance to the **Travel tab**.
22. The **Company Name** is displayed as a link under the Location Name label. Click on the link.

The screenshot shows a software interface with a top navigation bar containing tabs for 'Details', 'Finance', 'Policies', 'Certifications', 'Stamps', 'Travel', 'Billing', and 'Review'. The 'Travel' tab is highlighted with a red box. Below the tabs, the 'Travel Recommendation' section contains a table with the following data:

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Not Complete

At the bottom of the table, there is a link 'Add New Location' and two buttons labeled 'Previous' and 'Next'.

23. The **Travel Recommendation Detail** form is presented.
24. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
25. You must enter the information for all required fields which are denoted with a red * asterisks.
26. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
27. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
28. When done, click **Save** to continue.

Travel Recommendation Detail ←

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. []

→ Save

29. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
30. When done, click **Save** to continue.

Please review the addresses below.

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

[Save](#) [Cancel](#)

31. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was is missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
32. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
33. Confirm that the status for all locations is **Complete**, then click **Next** to continue.

Details Finance

Policies Certifications Stamps **Travel** Billing Review

Travel Recommendation

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Complete

[Add New Location](#)

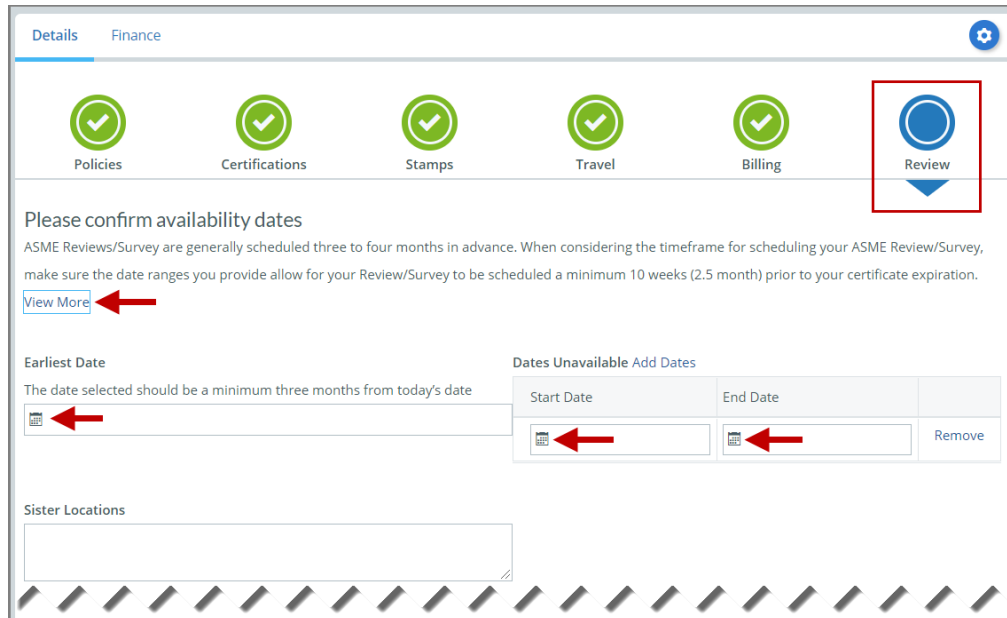
[Previous](#) [Next](#)

34. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
35. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.

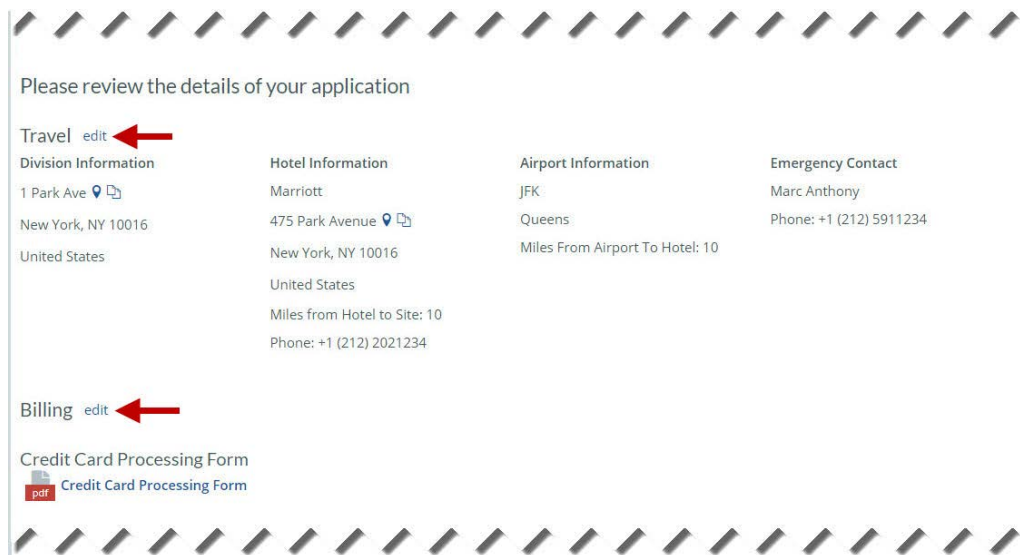
36. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
37. When done, click **Next** to continue.

The screenshot shows a web interface with a navigation bar at the top containing tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The Billing tab is active and highlighted with a blue checkmark and a red box. Below the navigation bar, the Billing section contains a heading 'Billing' and a sub-heading 'Billing Address'. The form is divided into two columns. The left column contains fields for Address Line 1, Address Line 2, Address Line 3, Country (a dropdown menu), City, Zip/Postal Code, Contact/Attention, and Phone Number. The right column contains a heading 'Company Banking Details' with a red arrow pointing to it, followed by a text box for 'Company Banking Details', a 'Bank Account Name / Beneficiary' field, 'ABA Routing Number', 'Billing Contact Email', 'Account Number / IBAN #', 'SWIFT Code / BIC', 'Bank Transit Number', and 'Tax ID Number'. At the bottom of the form, there is a link for 'Credit Card Processing Form' with a PDF icon and a red arrow pointing to it. At the very bottom, there are three buttons: 'Previous', 'Save', and 'Next', with a red arrow pointing to the 'Next' button.

38. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
39. The **Review tab** displays a summary of the information that was entered in each of the tabs.
40. Click the **View More** link to display additional information on availability dates.
41. Enter the **Earliest Date** that your company will be available for the review. Please note the dates you enter must be a minimum of three months in the future.
42. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



43. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
44. Select the **Edit** links to modify any of the information you entered.
45. Click on the **Credit Card Processing Form** to download the form if needed.



46. Scroll down the tab and select the **Upload Company Manual** link. Locate the manual on your local computer and upload the file.
47. Select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.

48. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
49. Select the **Upload Agreement Form** link.
50. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
51. Click **Save** to continue.

The screenshot shows a web form with two columns of input fields. The left column is titled 'Banking Details' and includes fields for Bank Name, ABA Routing Number, Account Number/IBAN #, Swift Code, Bank Transit Number, Bank Account Name, Tax ID Number, Contact/Attention Name, and Contact/Attention Email. The right column is titled 'Billing Address' and includes fields for address (1 Park Ave), city/state (New York, NY 10016), and country (United States). Below the input fields, there are two instruction sections. The first section is titled 'Please upload your company manual' and includes an 'Upload Company Manual' button with a red arrow pointing to it. The second section is titled 'Please print, sign and upload the Agreement Form' and includes a 'Download Agreement Form' button and an 'Upload Agreement Form' button, both with red arrows pointing to them. At the bottom right of the form, there are 'Previous' and 'Save' buttons, with a red arrow pointing to the 'Save' button.

Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

IMPORTANT: This is the only opportunity you will have to alter any of the information prior to submission of the application. After the application is submitted, in order to make any changes, you will need to submit a change request to ASME.

The screenshot shows a web form with three buttons at the bottom right: 'Previous', 'Save', and 'Submit'. A red arrow points to the 'Submit' button.

52. You will be redirected to the **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.

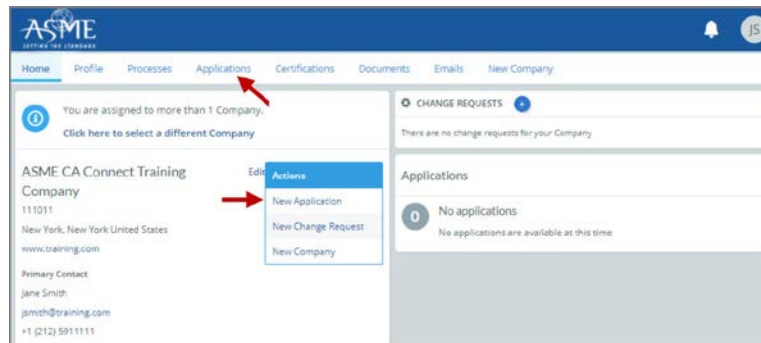
53. Click the blue gear icon and select the **Print Document** link.



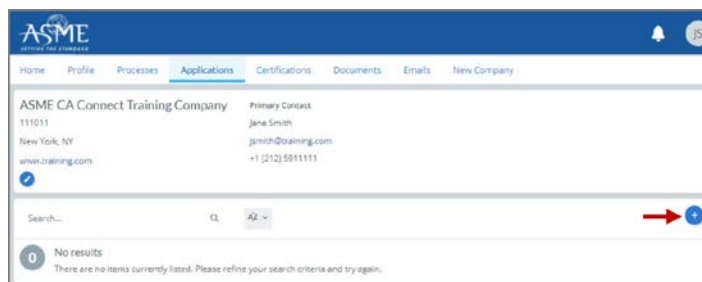
Nuclear Program (Corporate) – New Application

The information required to complete and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile**, **Certifications**, **Stamps**, **Travel**, **Billing**, and **Review**. Each tab consists of specific application details and downloading/uploading of files that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

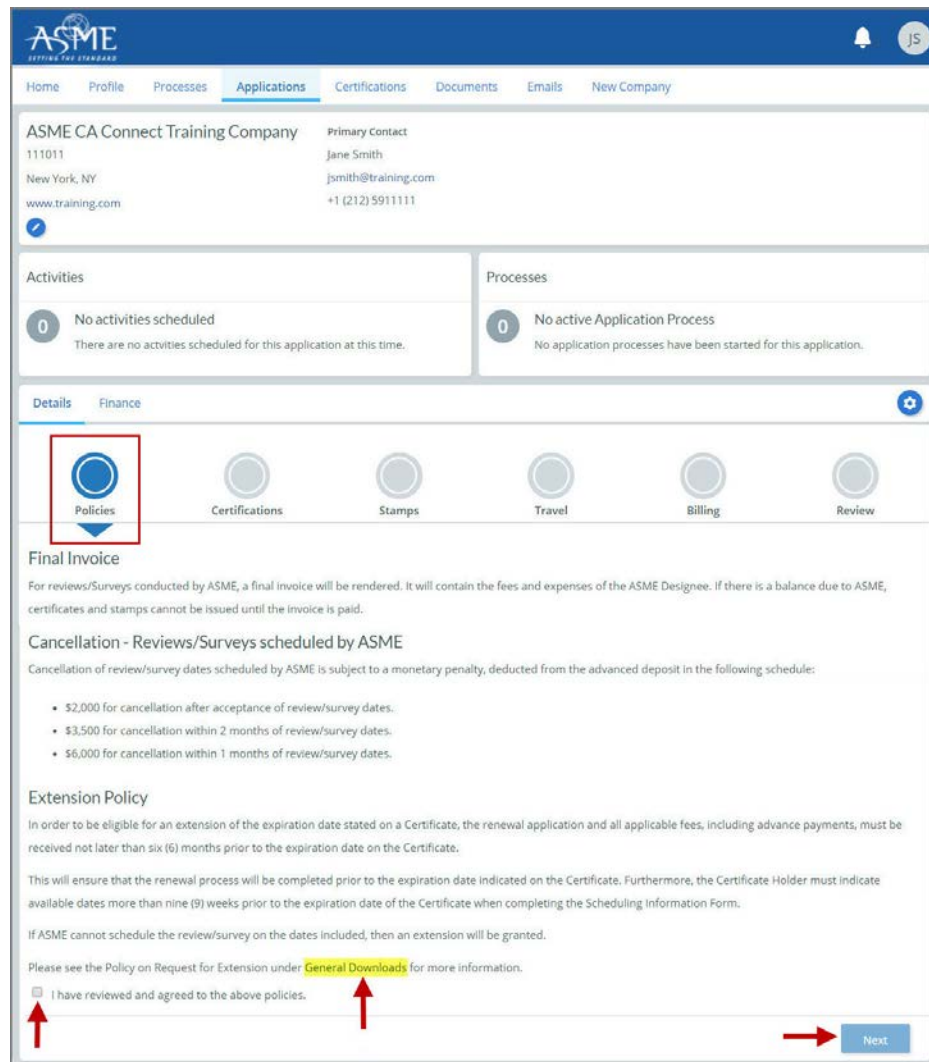
1. To begin the process of applying for certification, you must be logged into CA Connect as the company's Primary Contact.
2. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.



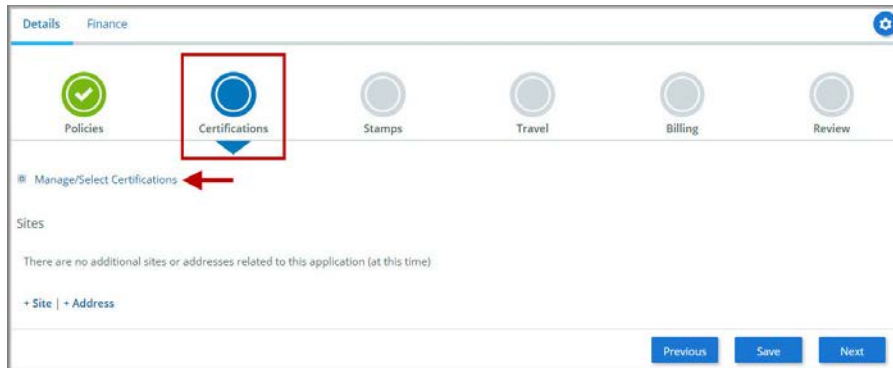
3. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.



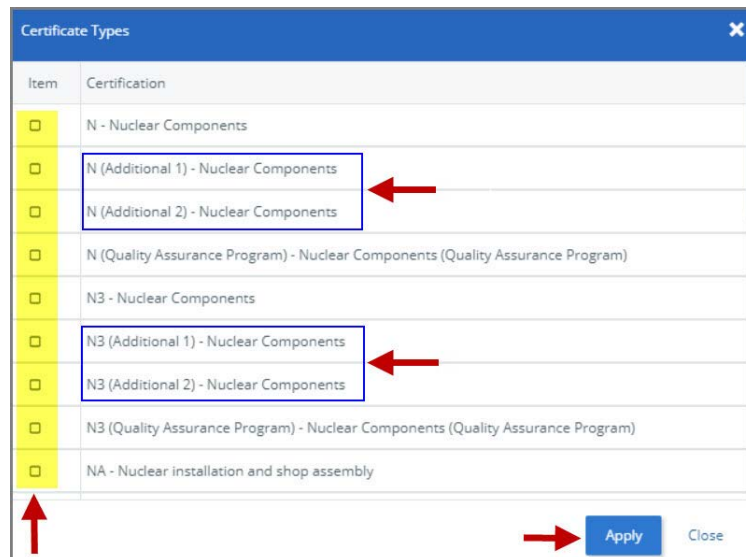
4. The first application tab is the **Policies tab**. Review all information displayed on the tab.
5. Scroll down the page to the **Extension Policy** section.
6. If you want to see the policy relating to a Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
7. Check **I have reviewed and agreed to the above policies** checkbox.
8. Click **Next** to continue.



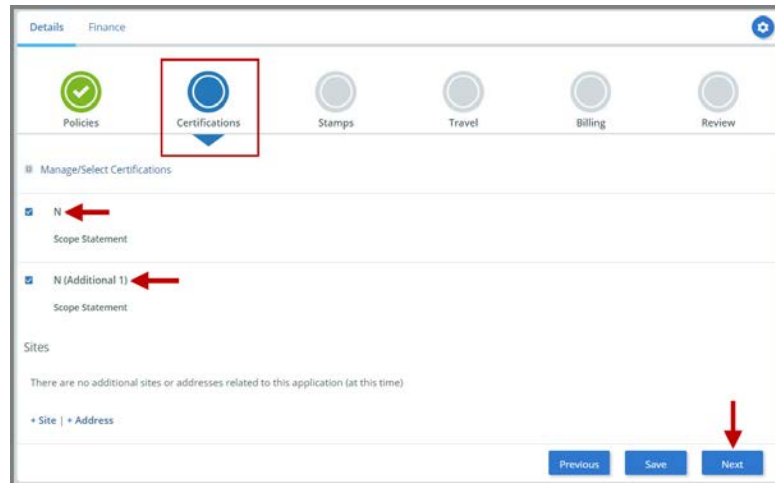
9. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications tab**.
10. Click the **Manage/Select Certifications** link or checkbox.



11. A list of Nuclear Certificate Types is displayed. Select the certificate type(s) you are applying for.
Note: You can select one **corporate** certificate type and two additional **corporate** certificate type of the same type. The two additional corporate certificate types contain the words **Additional 1** and **Additional 2**. These words will not appear in any of the related certificate pages or documents that are generated following certificate issuance.
12. When done, click **Apply** to continue.



- The Certificate Type(s) you selected will be added to the Certifications tab. Click **Next** to continue.



- The **Certifications** tab is updated to reflect a green checkmark. The application data processing will advance to the **Stamps tab**.
- Select an **Authorized Inspection Agency** from the list of AIA Organizations by clicking on the down arrow. Select the Authorized Inspection Agency.
- Click on the **Download Supplemental Form** link.
- The **Supplemental Application Form** is downloaded to your local drive.
- Complete the supplemental form.
- Save the completed form on your local drive.
- Click the **Upload Supplemental Form (PDF)** link.
- Locate the completed supplemental form on your local drive and upload the form.
- Enter the **number of ASME Single Certification Marks** you like to receive.
- Check each checkbox that applies to the certification. The **Stamp Confirmed by Applicant** checkbox is required.
- When done, click **Next** to continue.

25. The **Stamps** tab is updated to reflect a green checkmark. The application data processing will advance to the **Travel** tab.
26. The **Company Name** is displayed as a link under the Location Name label. Click on the link.

27. The **Travel Recommendation Detail** form is presented.
28. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
29. You must enter the information for all required fields which are denoted with a red * asterisks.
30. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
31. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
32. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. []

Save

33. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
34. When done, click **Save** to continue.

Please review the addresses below.

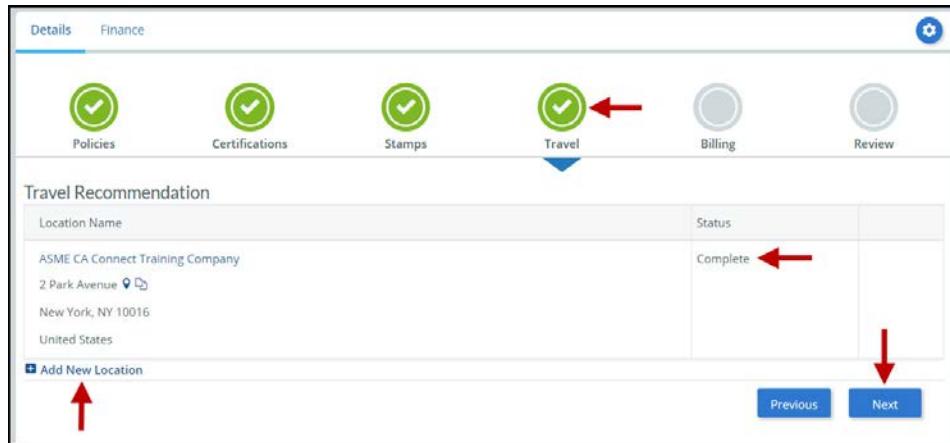
Hotel

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

Save Cancel

35. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
36. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
37. Confirm that the status for all locations is **Complete**, then click **Next** to continue.

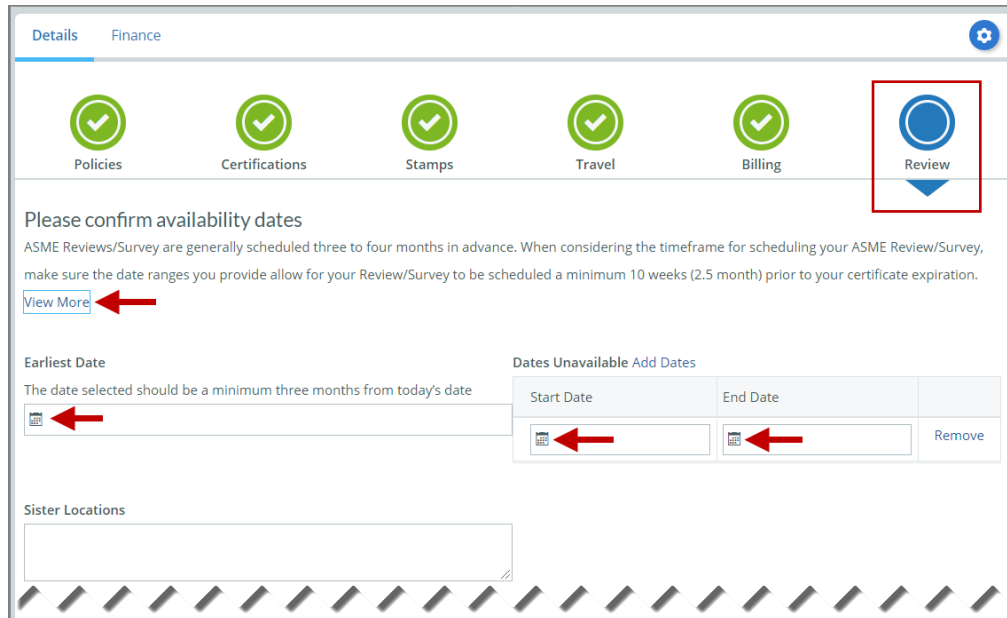


38. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
39. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.

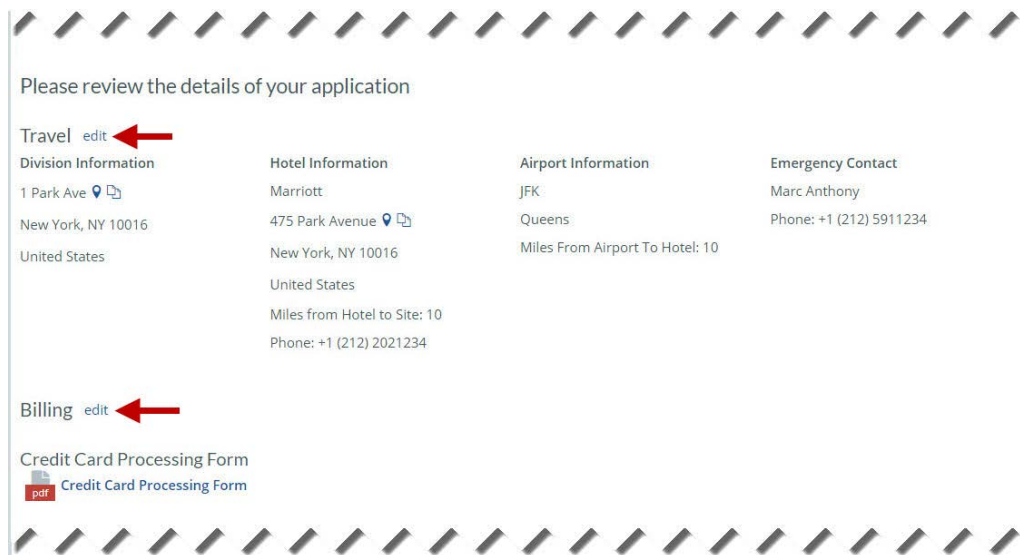
40. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the Credit Card Processing Form link to download the form. Complete the Credit Card Processing Form and fax the completed form to ASME.
41. When done, click **Next** to continue.

The screenshot shows a web application interface with a navigation bar at the top containing tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The Billing tab is active and highlighted with a blue checkmark and a red box. Below the navigation bar, the Billing section contains a heading 'Billing' and a sub-heading 'Billing Address'. The Billing Address section has fields for Address Line 1, 2, and 3, Country, City, Zip/Postal Code, Contact/Attention, and Phone Number. The Company Banking Details section has fields for Bank Account Name / Beneficiary, ABA Routing Number, Billing Contact Email, Account Number / IBAN #, SWIFT Code / BIC, and Bank Transit Number. There is also a Tax ID Number field. At the bottom of the form, there is a link for 'Credit Card Processing Form' with a PDF icon, and three buttons: 'Previous', 'Save', and 'Next'. Red arrows point to the 'Company Banking Details' section, the 'Credit Card Processing Form' link, and the 'Next' button.

42. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
43. The **Review tab** displays a summary of the information that was entered in each of the tabs.
44. Click the **View More** link to display additional information on availability dates.
45. Enter the **Earliest Date** that your company will be available for the review. Please note the dates you enter must be a minimum of three months in the future.
46. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



47. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
48. Select the **Edit** links to modify any of the information you entered.
49. Click on the **Credit Card Processing Form** to download the form if needed.



50. Scroll down the tab and select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.
51. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
52. Select the **Upload Agreement Form** link.

53. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
54. Click **Save** to continue.

Banking Details

Bank Name:

ABA Routing Number:

Account Number/IBAN #:

Swift Code:

Bank Transit Number:

Bank Account Name:

Tax ID Number:

Contact/Attention Name: Contxxx

Contact/Attention Email:

Billing Address

1 Park Ave

New York, NY 10016

United States

Please print, sign and upload the Agreement Form

Instructions: Please click the "Print Agreement" button, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it. Scan the signed form and save it as a pdf file on your computer. Finally, upload the scanned document via the upload box located below the "Print Agreement" button.

Please upload only your completed Print Agreement Form. No other forms should be submitted via this upload box.

Download Agreement Form

Upload Agreement Form

Previous Save

Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

IMPORTANT: This is the only opportunity you will have to alter any of the information prior to submission of the application. After the application is submitted, in order to make any changes, you will need to submit a change request to ASME.

Previous Save Submit

55. You will be redirected to the **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.
56. Click the blue gear icon and select the **Print Document** link.

Details Finance

Application Details

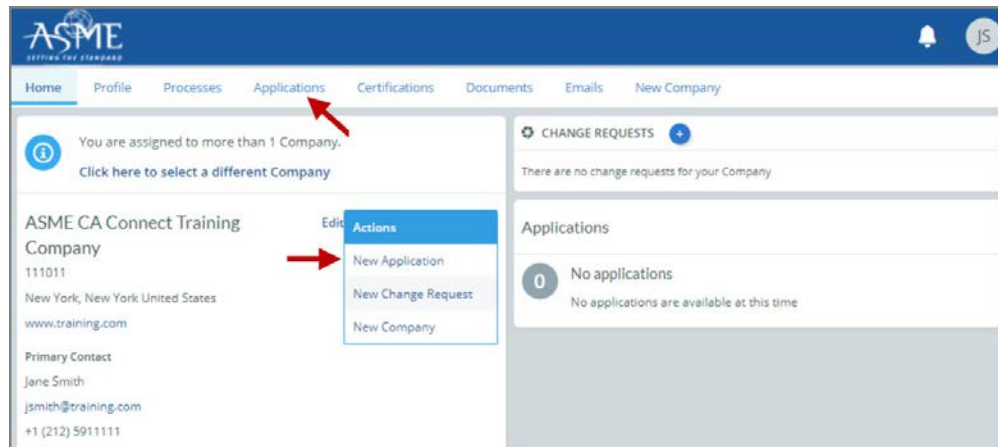
Application ID: FAB-130263

Print Document

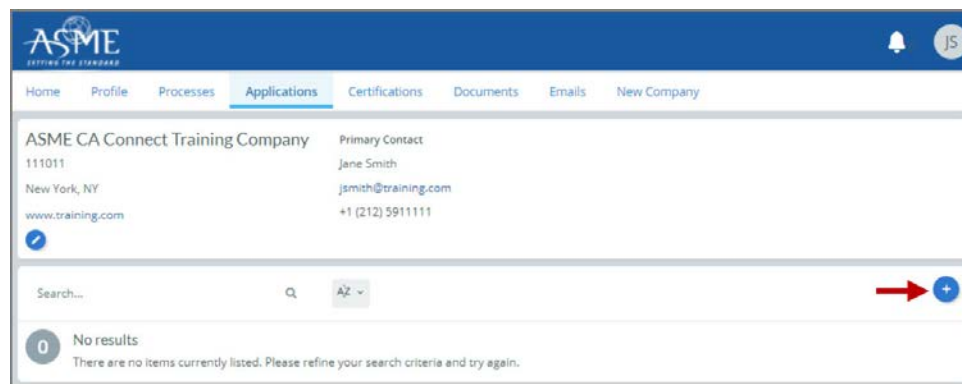
Nuclear Program (Corporate and Sites) – New Application

The information required to complete and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile**, **Certifications**, **Stamps**, **Travel**, **Billing**, and **Review**. Each tab consists of specific application details and downloading/uploading of files that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

1. To begin the process of applying for certification, you must be logged into CA Connect as the company's Primary Contact.
2. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.

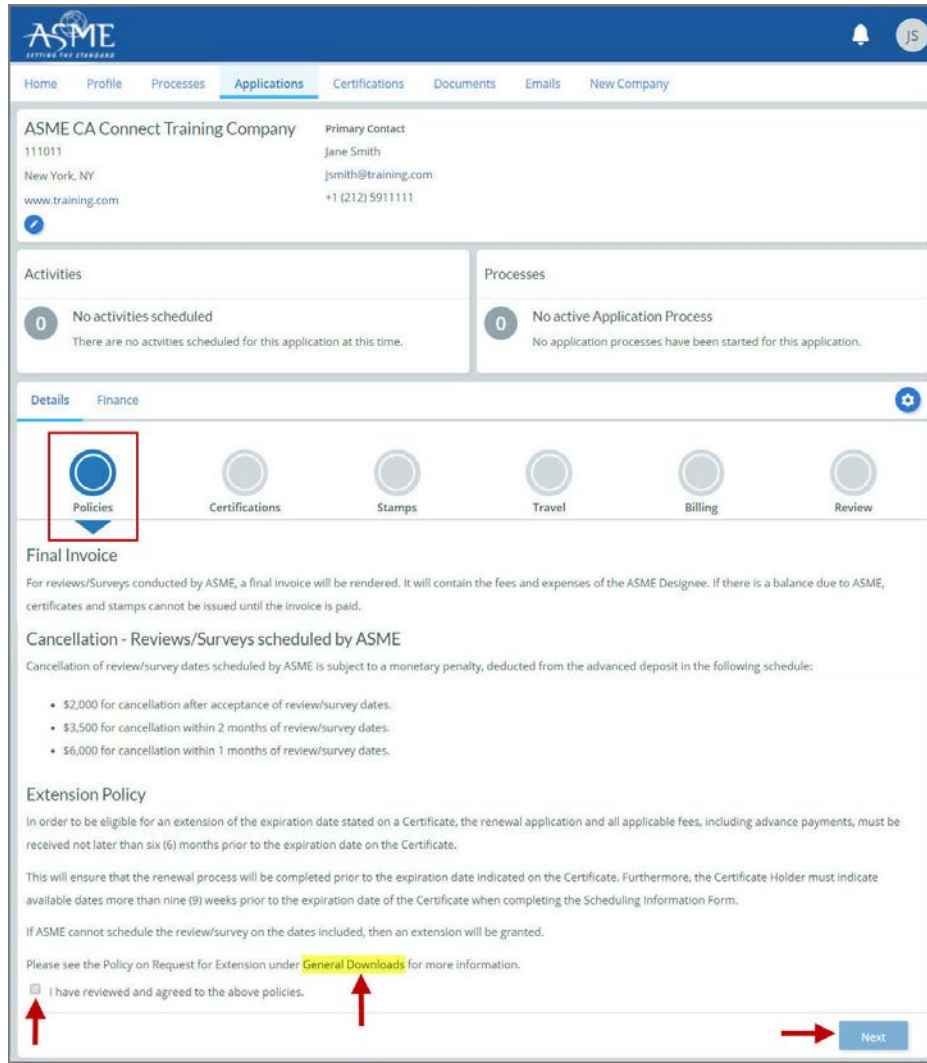


3. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.



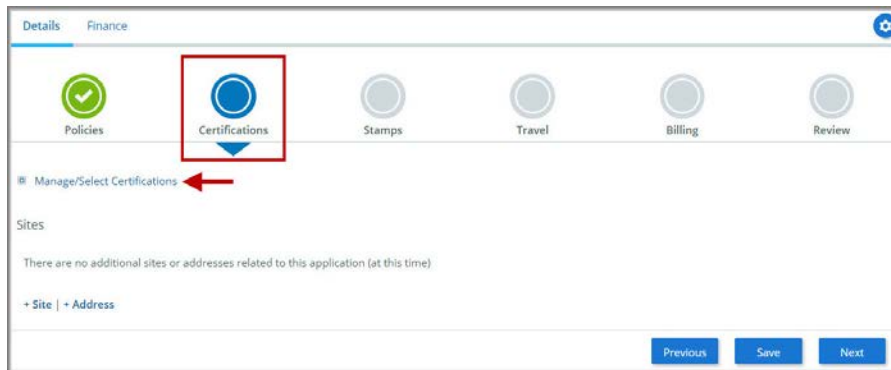
4. The first application tab is the **Policies tab**. Review all information displayed on the tab.
5. Scroll down the page to the **Extension Policy** section.
6. If you want to see the policy relating to a Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
7. Check **I have reviewed and agreed to the above policies** checkbox.

8. Click **Next** to continue.



9. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications** tab.

10. Click the **Manage/Select Certifications** link or checkbox.



11. The Certificate Types form is displayed. Select the certificate type(s) you are applying for.
Note: If you are applying for a Nuclear Corporate certificate and a Nuclear Site Extension certificate with the same certificate type, select the corporate certificate type only. **DO NOT** select certificate types that contain the words **Additional 1** and **Additional 2**.
12. When done, click **Apply** to continue.

Item	Certification
<input type="checkbox"/>	N - Nuclear Components
<input type="checkbox"/>	N (Additional 1) - Nuclear Components
<input type="checkbox"/>	N (Additional 2) - Nuclear Components
<input type="checkbox"/>	N (Quality Assurance Program) - Nuclear Components (Quality Assurance Program)
<input type="checkbox"/>	N3 - Nuclear Components
<input type="checkbox"/>	N3 (Additional 1) - Nuclear Components
<input type="checkbox"/>	N3 (Additional 2) - Nuclear Components
<input type="checkbox"/>	N3 (Quality Assurance Program) - Nuclear Components (Quality Assurance Program)
<input type="checkbox"/>	NA - Nuclear installation and shop assembly

13. Select the **Site** link on the Certifications tab.

Details Finance

Policies Certifications Stamps Travel Billing Review

Manage/Select Certifications

N

Scope Statement

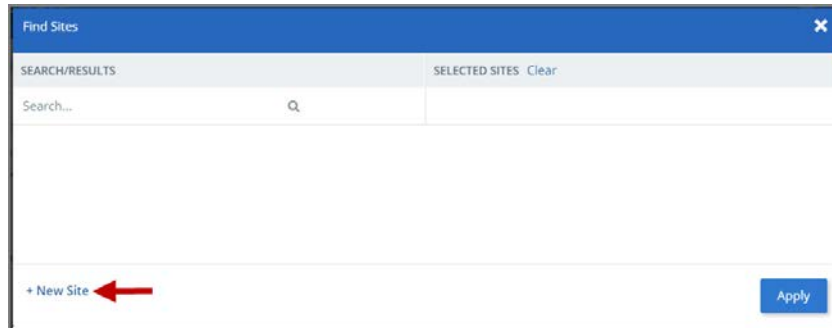
Sites

There are no additional sites or addresses related to this application (at this time)

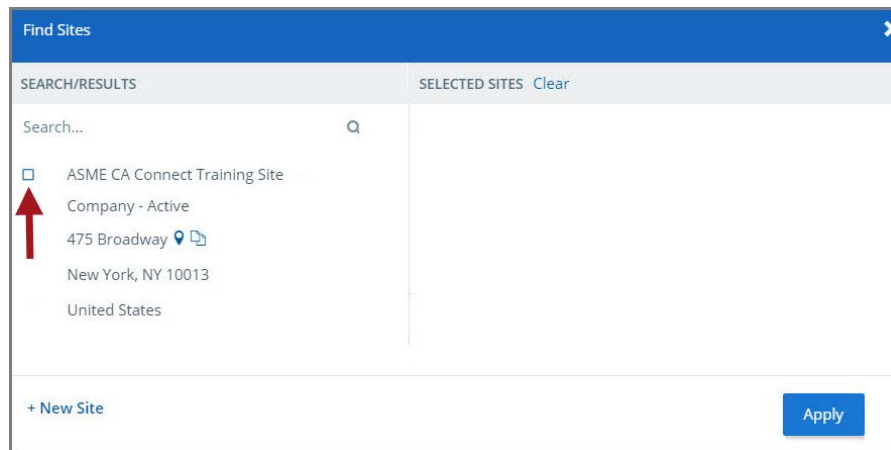
+ Site | + Address

Previous Save Next

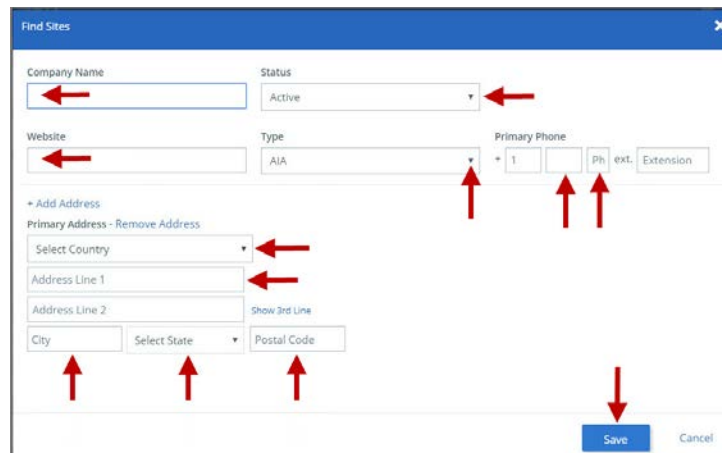
14. Select the **New Site** link to add the details required for the site certificate.



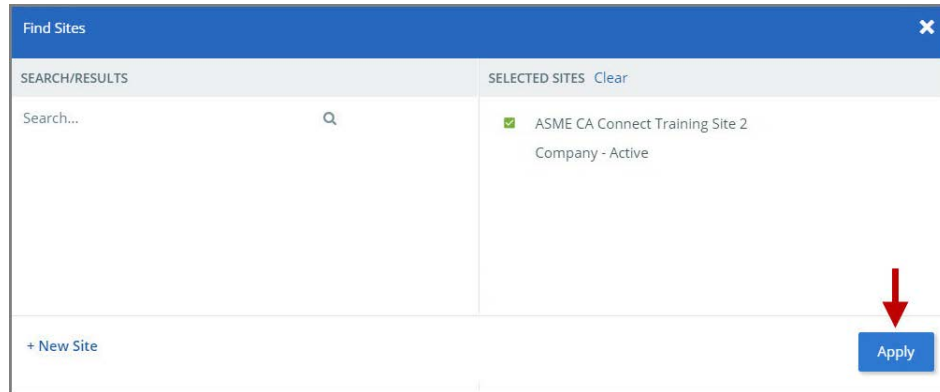
15. If the system locates a Company record that was previously for your company, the Company Name and Location will be imported and shown on the Find Sites page.
a. Select the checkbox preceding the Company Name to link the Company record to the site certification you are applying for.
16. To add a **New Site** for the site certification you are applying for, click the **New Site** link.



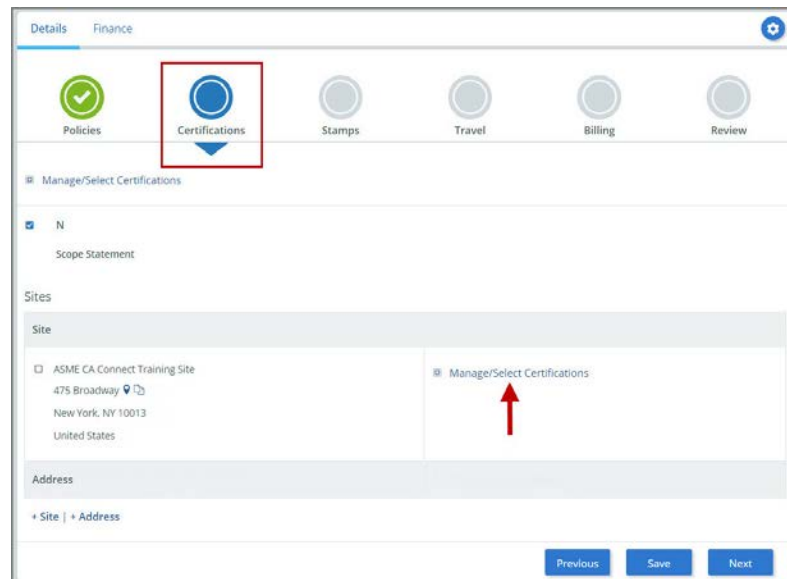
17. Enter the **Company** and **Address location** details for the **site certificate** in the designated fields.
18. When done, click **Save** to continue.



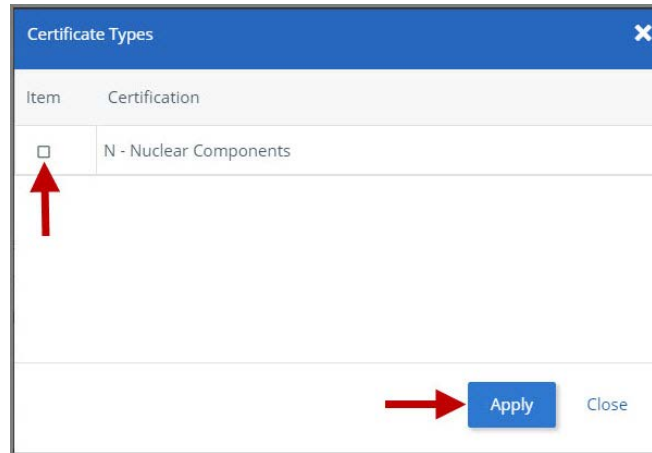
19. The site certificate details you entered will be displayed on the Find Sites form.
 - a. If you are applying for multiple site certificates for different locations. Click the **New Site** link again and add the company and location details for each site.
 - b. When done, click **Apply** to continue.



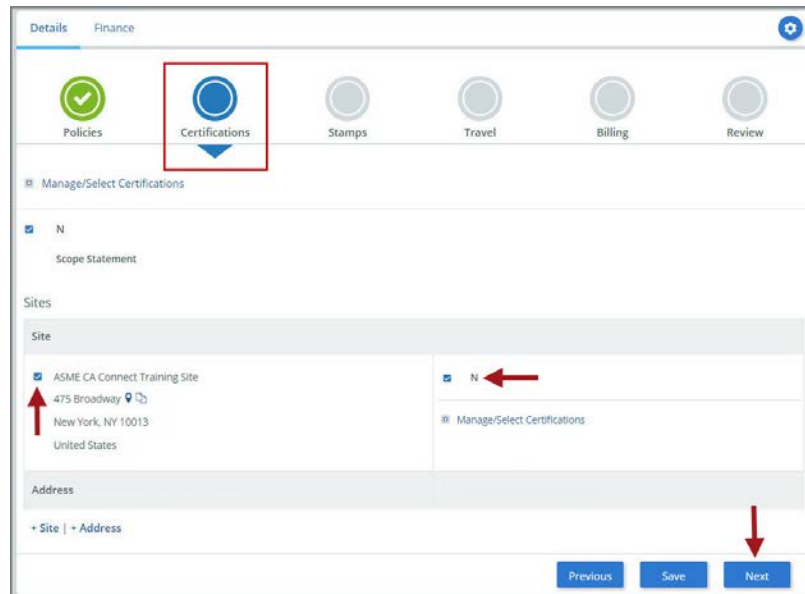
20. You will be redirected back to the Certifications tab where the Company record details are added.
21. Click the **Manage/Select Certifications** link.



22. Select the Certificate Type, then click **Apply** to continue.



23. The Certificate Type will be added to the Site details. Click **Next** to continue.



24. The **Certifications** tab is updated to reflect a green checkmark. The application data processing will advance to the **Stamps tab**.
25. Select an **Authorized Inspection Agency** from the list of AIA Organizations by clicking on the down arrow. Select the Authorized Inspection Agency.
26. Click on the **Download Supplemental Form** link.
27. The **Supplemental Application Form** is downloaded to your local drive.
28. Complete the supplemental form.
29. Save the completed form on your local drive.
30. Click the **Upload Supplemental Form (PDF)** link.
31. Locate the completed supplemental form on your local drive and upload the form.
32. Enter the **number of ASME Single Certification Marks** you like to receive.
33. Check each checkbox that applies to the certification. The **Stamp Confirmed by Applicant** checkbox is required.
34. When done, click **Next** to continue.

35. The **Stamps** tab is updated to reflect a green checkmark. The application data processing will advance to the **Travel** tab.
36. The **Company Name** is displayed as a link under the Location Name label. Click on the link.

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Not Complete

37. The **Travel Recommendation Detail** form is presented.
38. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
39. You must enter the information for all required fields which are denoted with a red * asterisks.
40. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
41. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
42. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. []

Save

43. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
44. When done, click **Save** to continue.

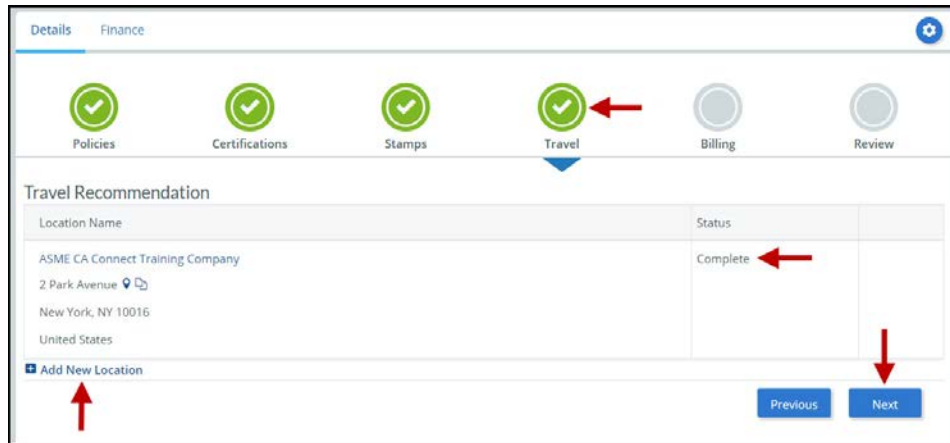
Please review the addresses below.

Hotel

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States
<input checked="" type="checkbox"/> Use Valid USPS Address	

Save Cancel

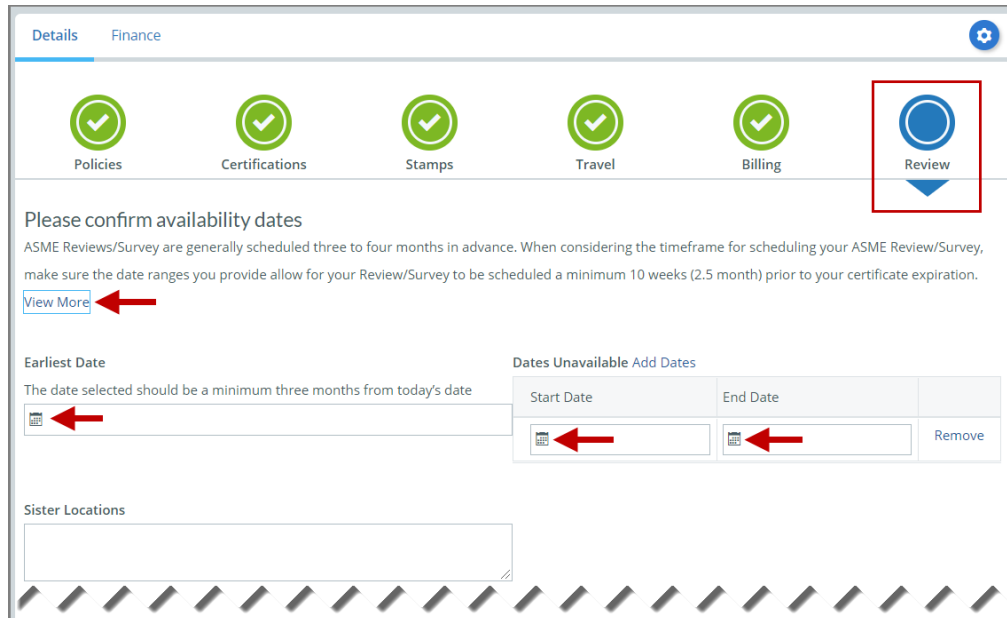
45. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
46. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
47. Confirm that the status for all locations is **Complete**, then click **Next** to continue.



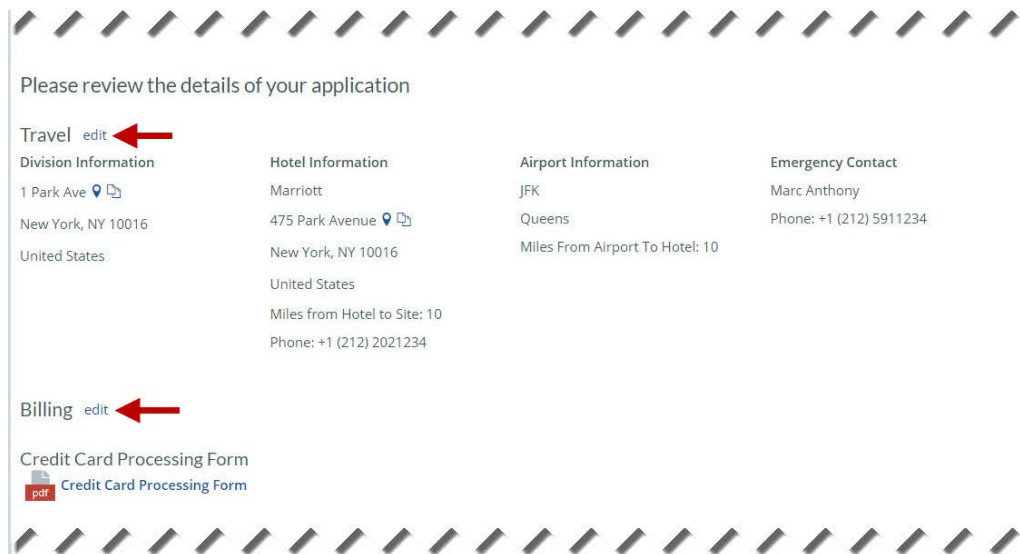
48. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
49. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
50. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
51. When done, click **Next** to continue.

The screenshot shows a software interface with a top navigation bar containing tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The Billing tab is active and highlighted with a blue checkmark and a red box. Below the tabs, the Billing section is titled 'Billing' and includes a sub-header 'Billing Address' with options for 'Use Plant Address' and 'Use Mailing Address'. The form contains several input fields: Address Line 1, 2, and 3; Country (a dropdown menu); City; Zip/Postal Code; Contact/Attention; and Phone Number (with separate fields for country code and extension). On the right side, there are fields for Company Banking Details, Bank Account Name / Beneficiary, ABA Routing Number, Billing Contact Email, Account Number / IBAN #, SWIFT Code / BIC, Bank Transit Number, and Tax ID Number. A red arrow points to the 'Company Banking Details' header. At the bottom, there is a 'Credit Card Processing Form' link with a PDF icon, also indicated by a red arrow. The 'Next' button is highlighted with a red arrow.

52. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
53. The **Review tab** displays a summary of the information that was entered in each of the tabs.
54. Click the **View More** link to display additional information on availability dates.
55. Enter the **Earliest Date** that your company will be available for the review. Please note the dates you enter must be a minimum of three months in the future.
56. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



57. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
58. Select the **Edit** links to modify any of the information you entered.
59. Click on the **Credit Card Processing Form** to download the form if needed.



60. Scroll down the tab and select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.

61. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
62. Select the **Upload Agreement Form** link.
63. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
64. Click **Save** to continue.

The screenshot shows a web form with two columns of input fields. The left column is titled 'Banking Details' and includes fields for Bank Name, ABA Routing Number, Account Number/IBAN #, Swift Code, Bank Transit Number, Bank Account Name, Tax ID Number, Contact/Attention Name, and Contact/Attention Email. The right column is titled 'Billing Address' and includes fields for address (1 Park Ave), city (New York, NY 10016), and country (United States). Below the form, there is a section titled 'Please print, sign and upload the Agreement Form' with instructions. At the bottom, there are two links: 'Download Agreement Form' and 'Upload Agreement Form', both with red arrows pointing to them. To the right, there are two buttons: 'Previous' and 'Save', with a red arrow pointing to the 'Save' button.

Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

IMPORTANT: This is the only opportunity you will have to alter any of the information prior to submission of the application. After the application is submitted, in order to make any changes, you will need to submit a change request to ASME.

The screenshot shows a web form with three buttons at the bottom: 'Previous', 'Save', and 'Submit'. A red arrow points to the 'Submit' button.

65. You will be redirected to the **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.

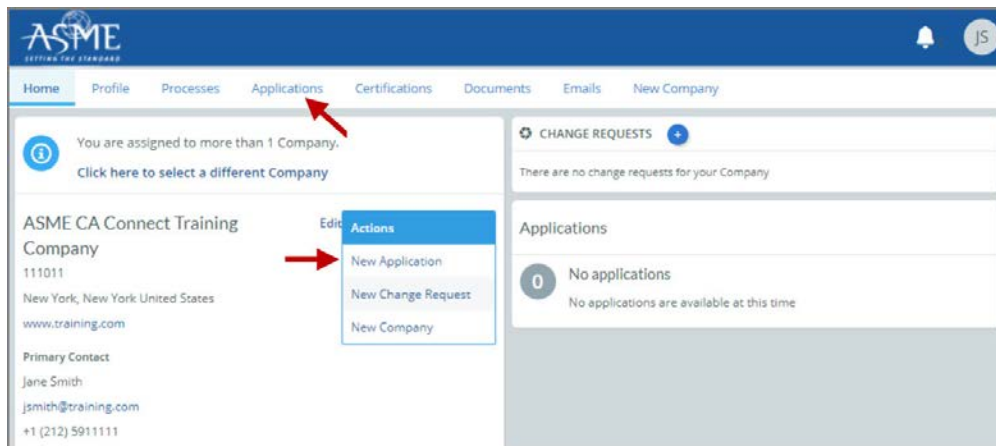
66. Click the blue gear icon and select the **Print Document** link.



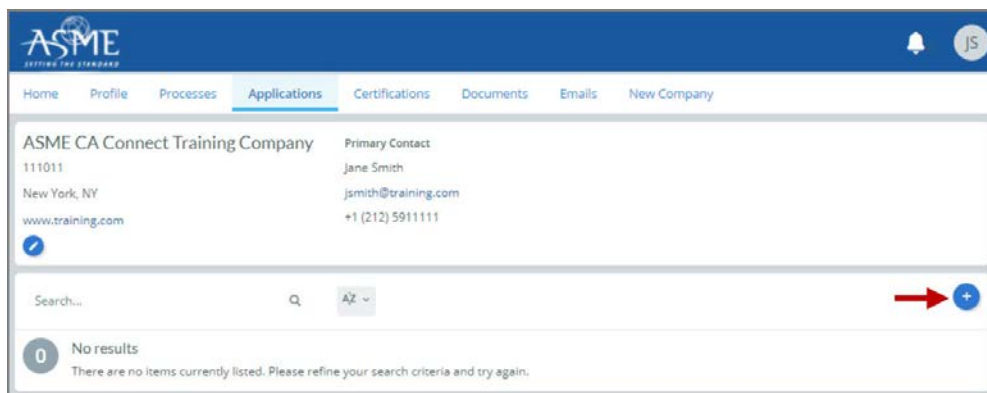
PRD Program – New Application

The information required to complete and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile**, **Certifications**, **Stamps**, **Travel**, **Billing**, and **Review**. Each tab consists of specific application details and downloading/uploading of files that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

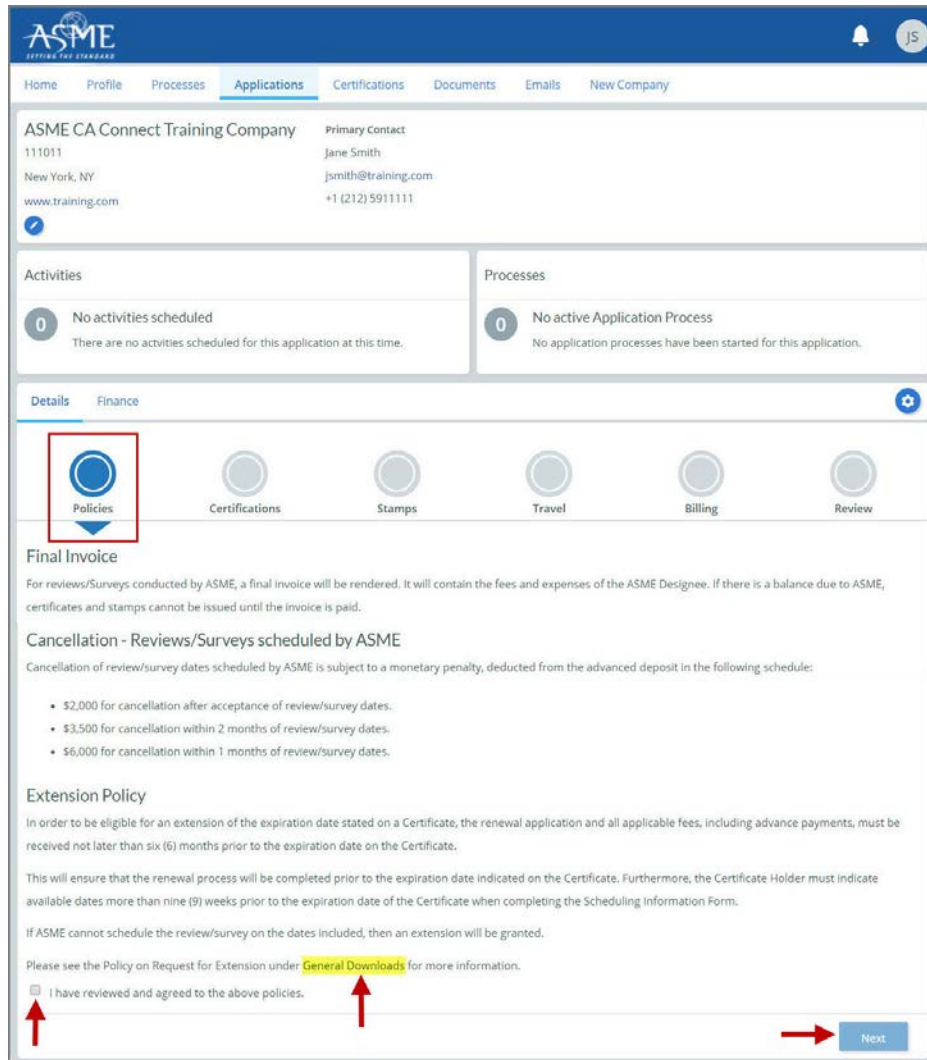
1. To begin the process of applying for certification, you must be logged into CA Connect as the company's Primary Contact.
2. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.



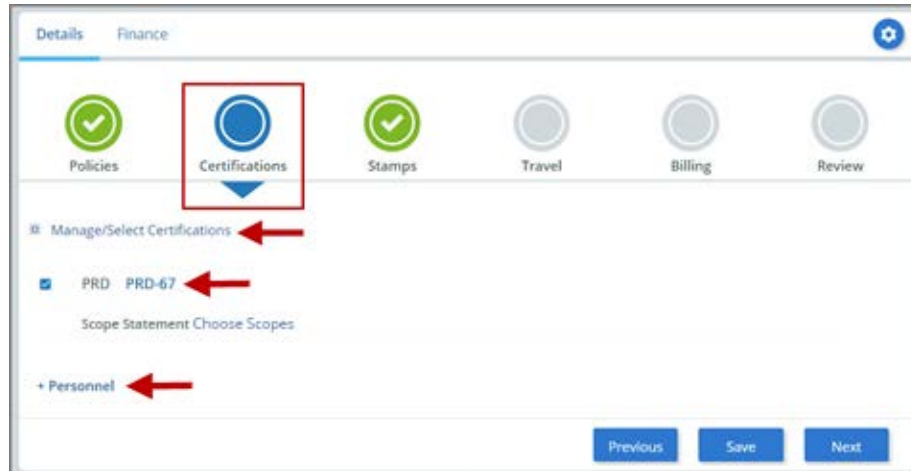
3. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.



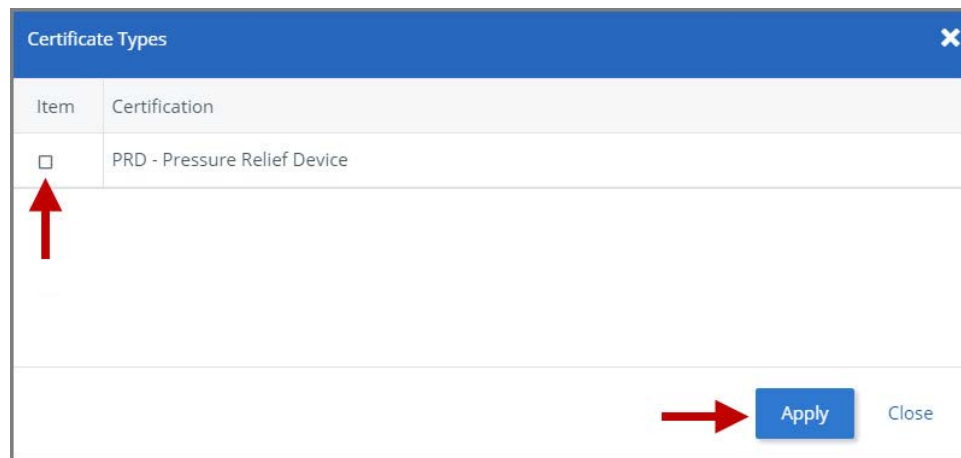
4. The first application tab is the **Policies tab**. Review all information displayed on the tab.
5. Scroll down the page to the **Extension Policy** section.
6. If you want to see the policy relating to a Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
7. Check **I have reviewed and agreed to the above policies** checkbox.
8. Click **Next** to continue.



9. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications tab**.
10. The active Certificate Type and Certificate Number are displayed on the Certifications tab.
11. Click the **Manage/Select Certifications** link or checkbox.



12. The **Certificate Types** form is displayed.
13. Select **PRD – Pressure Relief Device**, click **Apply** to continue.



14. You will be directed back to the **Certifications** tab. Select the Scope Statement **Choose Scopes** link
15. You will be taken to the **Scopes** form. Select the applicable scope(s).
16. When done, click **Apply** to continue.

Item	Certification
<input type="checkbox"/>	Nitrogen - Nitrogen
<input type="checkbox"/>	Steam
<input type="checkbox"/>	Air
<input type="checkbox"/>	Water
<input type="checkbox"/>	Liquids - Liquids
<input type="checkbox"/>	Natural Gas - Natural Gas

17. The PRD certificate type and scope(s) you selected will be added to the **Certifications** tab.
18. Select the **Personnel** link on the Certifications tab.

Details Finance

Policies
 Certifications
 Stamps
 Travel
 Billing
 Review

Manage/Select Certifications

PRD

 Scope Statement: Choose Scopes

 Steam

Personnel

There are no additional personnel related to this application (at this time)

19. The **Find Personnel** form is displayed.
20. To select an existing Individual Observer, select the checkbox preceding their name. Skip the next step.

21. To add a new individual observer:
 - a. Enter the individual observer related information in the fields below.
 - b. Click the **Add Address** information to enter the address.
 - c. When done, click **Save** to continue. You will complete a form separately for each individual observer.

The screenshot shows the 'Find Personnel' form with the following fields and annotations:

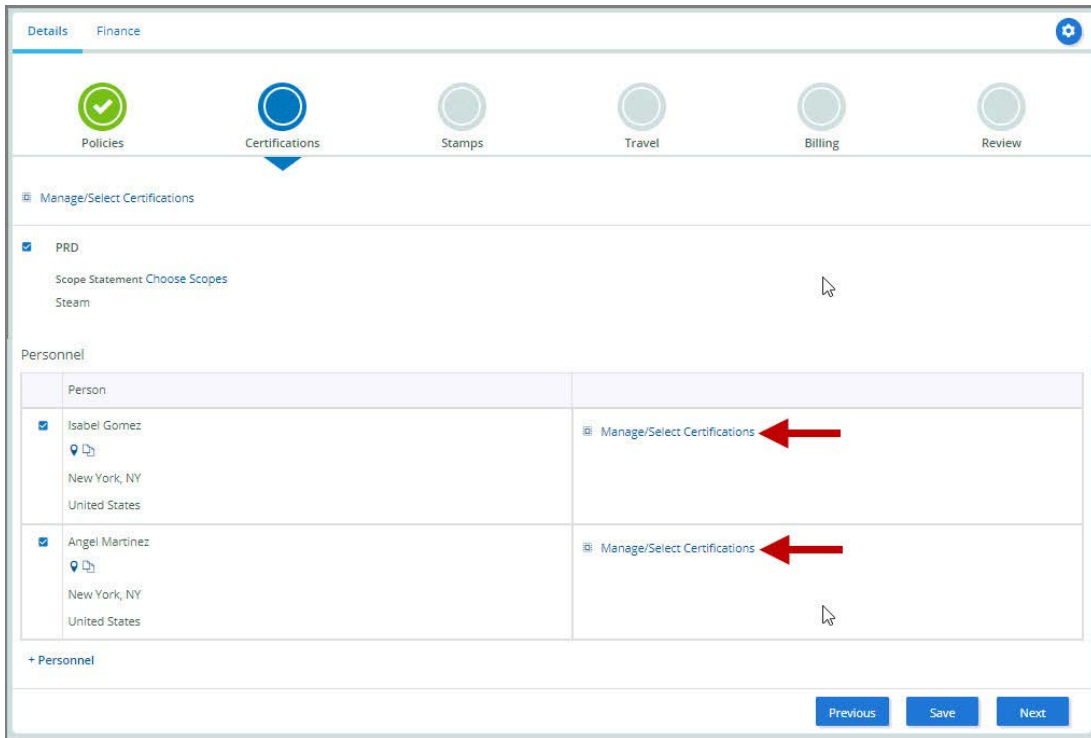
- First Name:** Input field with a red arrow pointing to it.
- Last Name:** Input field with a red arrow pointing to it.
- Primary Email:** Input field labeled 'Email Address' with a red arrow pointing to it.
- Credentials:** Input field with a red arrow pointing to it.
- Master Customer ID:** Input field.
- Primary Phone:** Input field with a red arrow pointing to it. It includes a dropdown for country code (showing '+ 1'), a 'Phone Number' field, and an 'ext.' field with an 'Extension' input.
- + Add Address:** Link with a red arrow pointing to it.
- Save:** Blue button with a red arrow pointing to it.
- Cancel:** Text link.

- d. The Individual Observer information will be added to the **Find Personnel** form.
 - e. To add another Individual Observer, click the **New Personnel** link and repeat the same steps to add each individual observer.
22. When done, click **Apply** to continue.

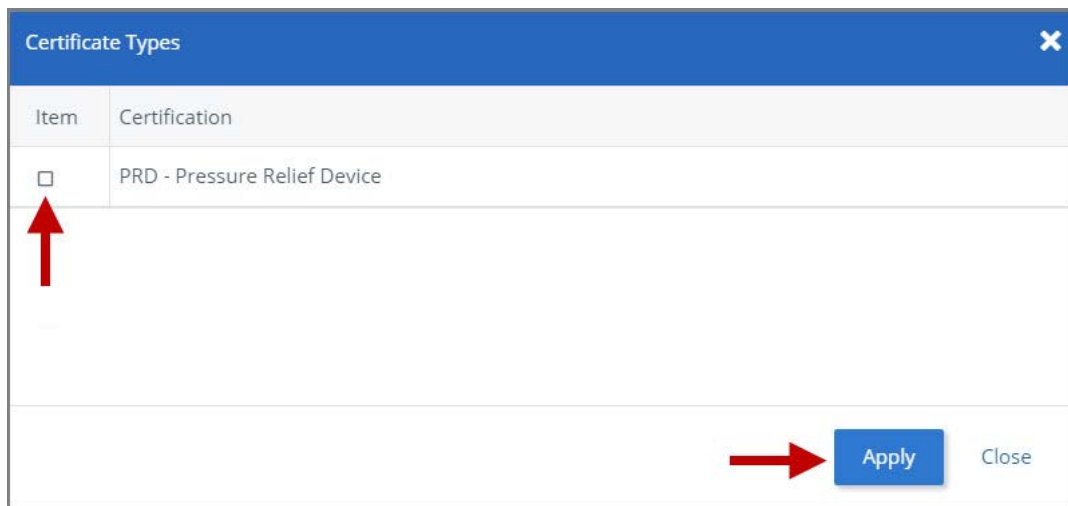
The screenshot shows the 'Find Personnel' search results page with the following elements and annotations:

- SEARCH/RESULTS:** Section containing a search bar and a list of results:
 - Angel Smith, New York, New York
 - William Levy
 - Isabel Gomez, New York, New York
- SELECTED PEOPLE:** Section containing a list of selected people:
 - Angel Martinez, New York, New York
- + New Personnel:** Link with a red arrow pointing to it.
- Apply:** Blue button with a red arrow pointing to it.

23. Select the **Manage/Select Certifications** link to connect the PRD Certificate Type to each person.



24. Select the **PRD-Pressure Relief Device** certificate type option.
25. When done, click **Apply** to continue.



26. You will be directed back to the **Certifications** tab. Click **Next** to continue.

The screenshot shows the 'Details Finance' page. At the top, there are six tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The 'Certifications' tab is selected and highlighted with a red box. Below the tabs, there is a section titled 'Manage/Select Certifications' with a checkbox for 'PRD'. Underneath, there is a 'Personnel' section with a table listing two people: Isabel Gomez and Angel Martinez. For each person, there is a checkbox for 'PRD' and a link for 'Manage/Select Certifications'. Red arrows point to the 'PRD' checkboxes for both Isabel Gomez and Angel Martinez. At the bottom right of the page, there are three buttons: 'Previous', 'Save', and 'Next'. A red arrow points to the 'Next' button.

27. Select the **Choose Scopes** link for each person.

28. Scopes form is displayed. Select the applicable scope.

29. Repeat the same steps to select the scope for each person.

30. When done, click **Next** to continue.

31. Both the **Certifications** tab and **Stamps** tab are updated to reflect a green checkmark. The application data processing will advance to the **Stamps** tab. Click **Next** to continue.

The screenshot shows the 'Details Finance' page. At the top, there are six tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The 'Stamps' tab is selected and highlighted with a red box. Below the tabs, there is a section titled 'Program Type' with the value 'PRD'. At the bottom right of the page, there are three buttons: 'Previous', 'Save', and 'Next'. A red arrow points to the 'Next' button.

32. Your application process will advance to the **Travel** tab.

33. The **Company Name** is displayed as a link under the Location Name label. Click on the link.

Details Finance

Policies Certifications Stamps **Travel** Billing Review

Travel Recommendation

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Not Complete

Add New Location

Previous Next

34. The **Travel Recommendation Detail** form is presented.
35. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
36. You must enter the information for all required fields which are denoted with a red * asterisks.
37. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
38. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
39. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. []

Save

40. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
41. When done, click **Save** to continue.

Please review the addresses below.

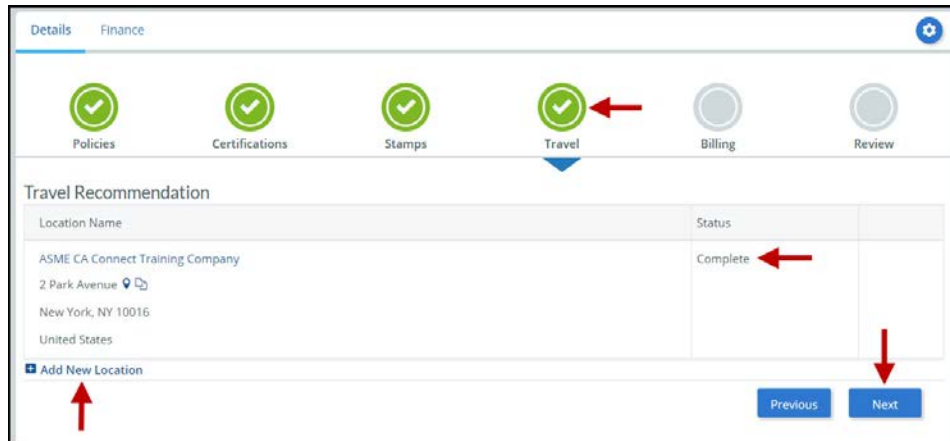
Hotel

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

Save Cancel

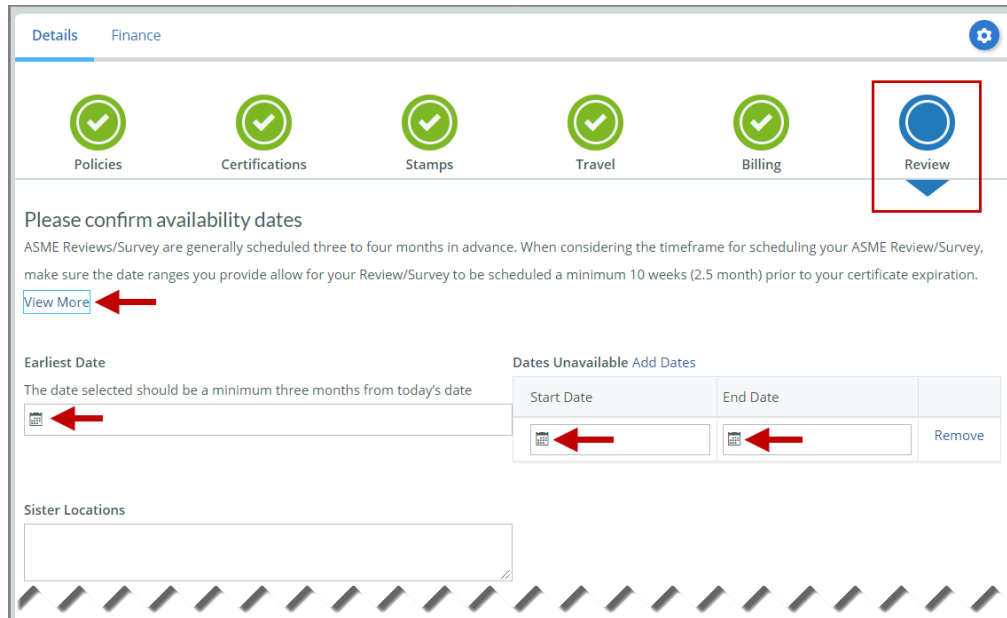
42. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
43. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
44. Confirm that the status for all locations is **Complete**, then click **Next** to continue.



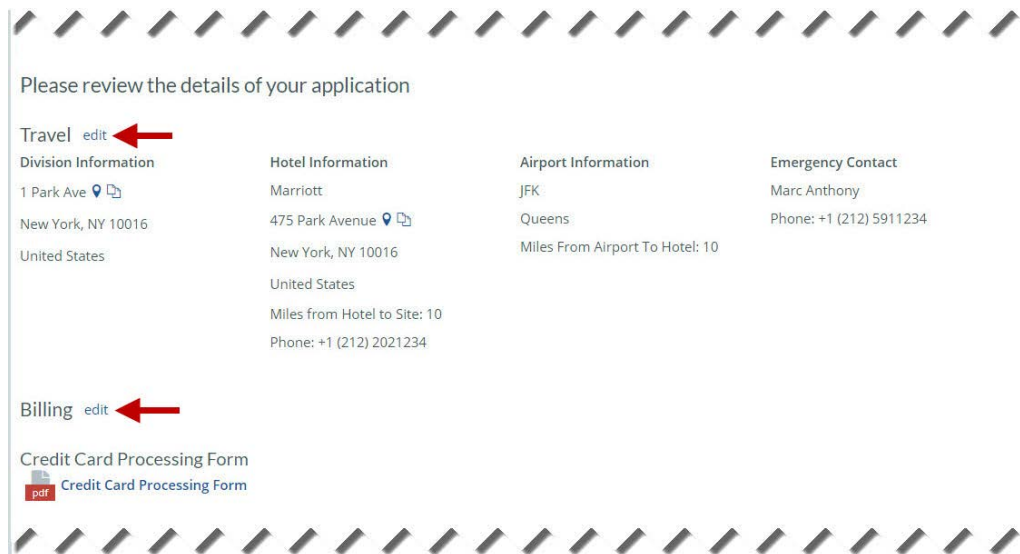
45. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
46. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
47. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
48. When done, click **Next** to continue.

The screenshot shows a software interface with a top navigation bar containing tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The Billing tab is active and highlighted with a red box and a green checkmark. Below the tabs, the Billing section is titled 'Billing' and includes a sub-header 'Billing Address' with options for 'Use Plant Address' and 'Use Mailing Address'. The form contains several input fields: Address Line 1, 2, and 3; Country (a dropdown menu); City; Zip/Postal Code; Contact/Attention; and Phone Number (with separate fields for country code and extension). On the right side, there are fields for Company Banking Details, Bank Account Name / Beneficiary, ABA Routing Number, Billing Contact Email, Account Number / IBAN #, SWIFT Code / BIC, Bank Transit Number, and Tax ID Number. A red arrow points to the 'Company Banking Details' section. At the bottom, there is a 'Credit Card Processing Form' section with a PDF icon and a red arrow pointing to it. The bottom right corner features three buttons: 'Previous', 'Save', and 'Next', with a red arrow pointing to the 'Next' button.

49. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
50. The **Review tab** displays a summary of the information that was entered in each of the tabs.
51. Click the **View More** link to display additional information on availability dates.
52. Enter the **Earliest Date** that your company will be available for the review. Please note the dates you enter must be a minimum of three months in the future.
53. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



- 54. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
- 55. Select the **Edit** links to modify any of the information you entered.
- 56. Click on the **Credit Card Processing Form** to download the form if needed.



- 57. Scroll down the tab and select the **Upload Company Manual** link. Locate the manual on your local computer and upload the file.
- 58. Select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.

59. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
60. Select the **Upload Agreement Form** link.
61. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
62. Click **Save** to continue.

The screenshot shows a web form with the following sections:

- Banking Details:** Bank Name, ABA Routing Number, Account Number/IBAN #, Swift Code, Bank Transit Number, Bank Account Name, Tax ID Number, Contact/Attention Name, Contact/Attention Email.
- Billing Address:** 1 Park Ave, New York, NY 10016, United States.
- Upload Instructions:**
 - "Please upload your company manual" section with an "Upload Company Manual" button.
 - "Please print, sign and upload the Agreement Form" section with a "Download Agreement Form" button and an "Upload Agreement Form" button.
- Navigation:** "Previous" and "Save" buttons at the bottom right.

Red arrows in the image point to the "Upload Company Manual", "Download Agreement Form", "Upload Agreement Form", and "Save" buttons.

Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

IMPORTANT: This is the only opportunity you will have to alter any of the information prior to submission of the application. After the application is submitted, in order to make any changes, you will need to submit a change request to ASME.

This screenshot shows the bottom right corner of the web form, featuring three buttons: "Previous", "Save", and "Submit". A red arrow points to the "Submit" button.

63. You will be redirected to the **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.

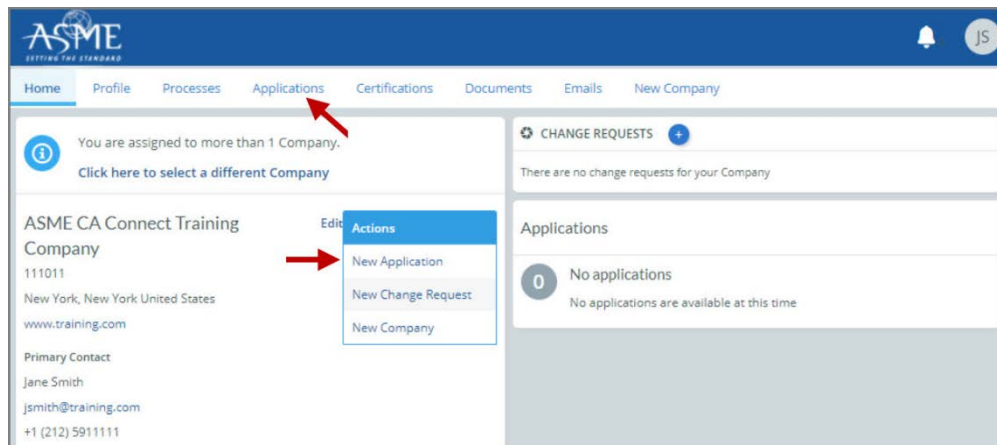
64. Click the blue gear icon and select the **Print Document** link.



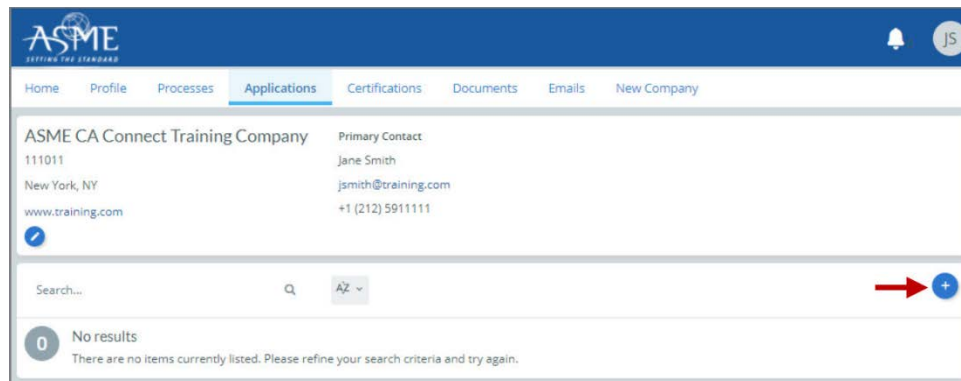
QSC Program (Corporate) – New Application

The information required to complete and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile**, **Certifications**, **Stamps**, **Travel**, **Billing**, and **Review**. Each tab consists of specific application details and downloading/uploading of files that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

1. To begin the process of applying for certification, you must be logged into CA Connect as the company's Primary Contact.
2. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.

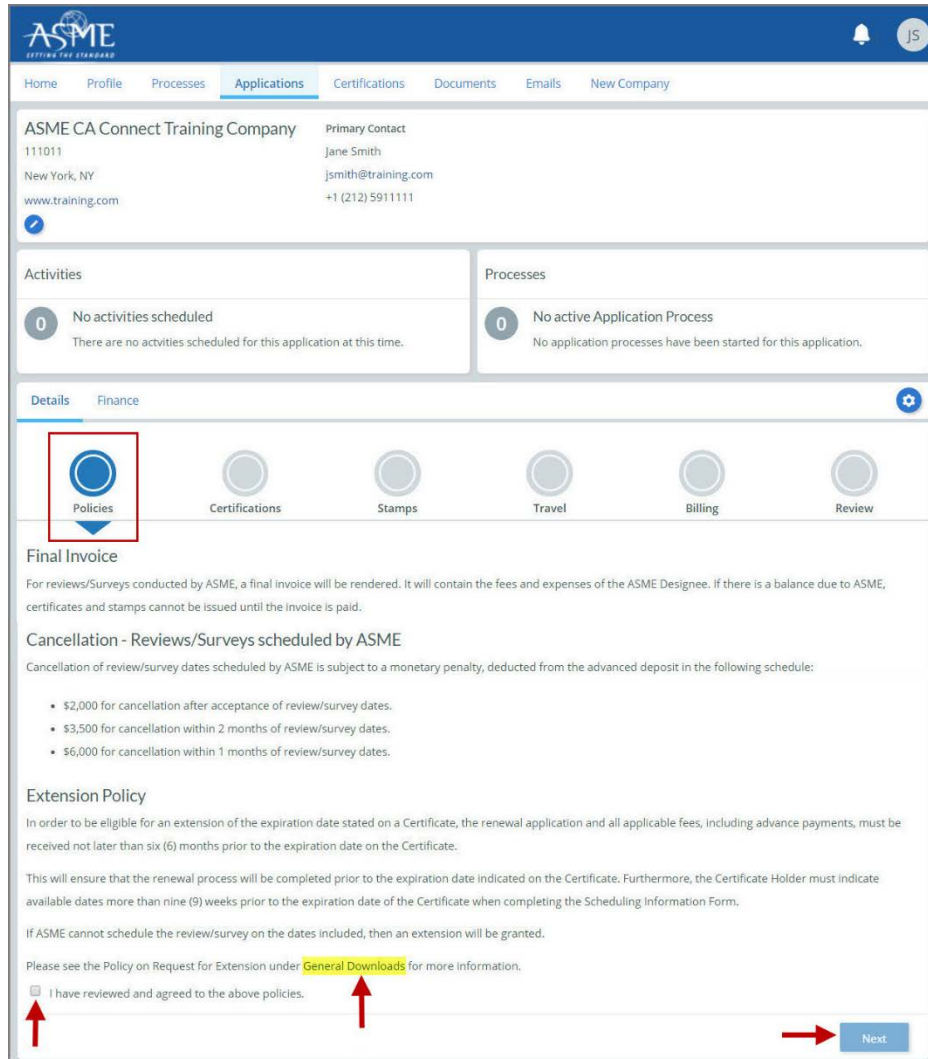


3. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.

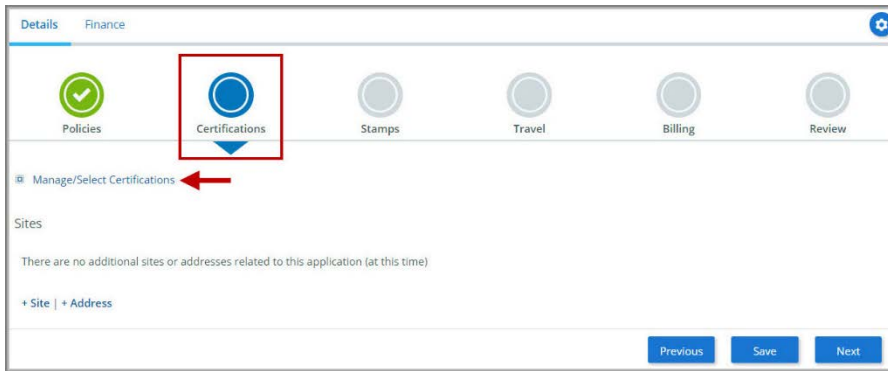


4. The first application tab is the **Policies** tab. Review all information displayed on the tab.
5. Scroll down the page to the **Extension Policy** section.

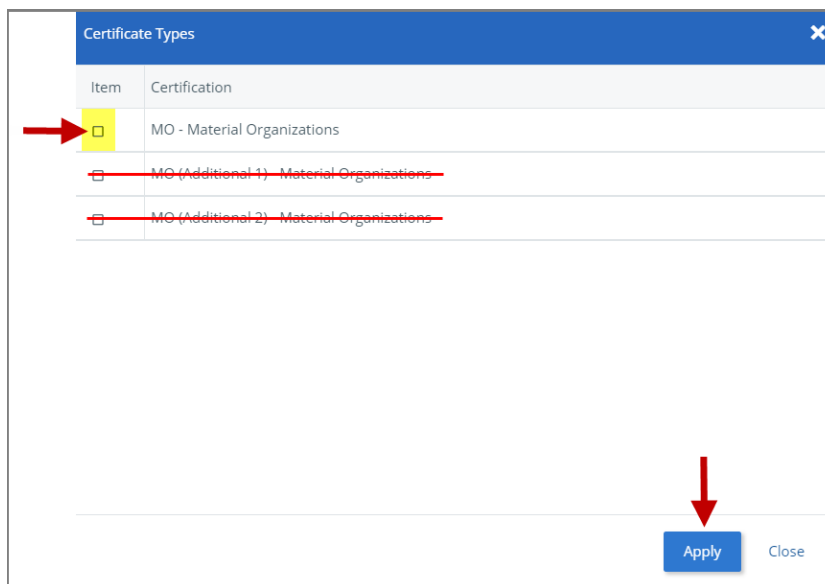
6. If you want to see the policy relating to a Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
7. Check **I have reviewed and agreed to the above policies** checkbox.
8. Click **Next** to continue.



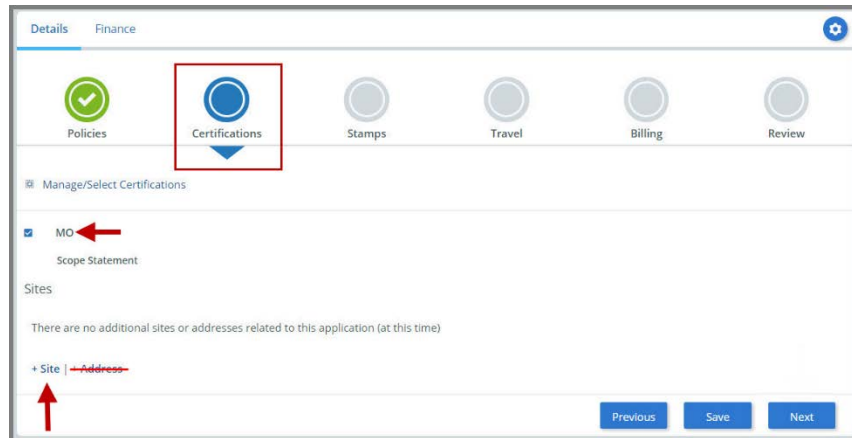
9. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications** tab.
10. Click the **Manage/Select Certifications** link or checkbox.



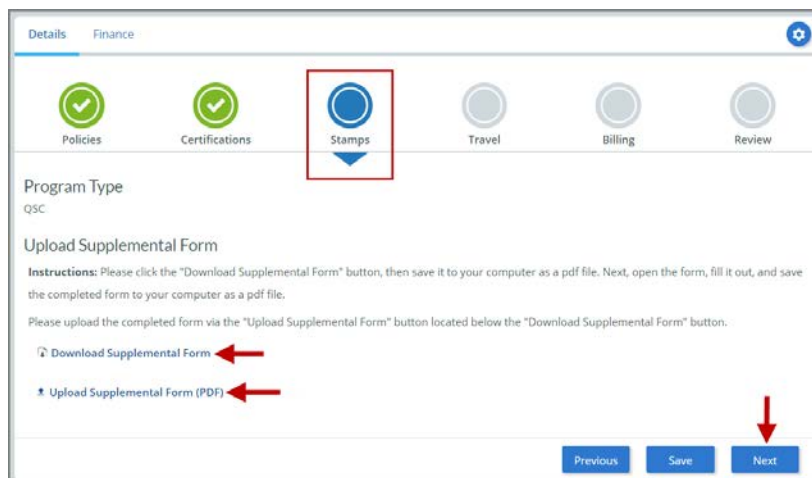
11. The Certificate Types form is displayed. Select the certificate type(s) you are applying for.
Note: You can select one **corporate** certificate type and two additional **corporate** certificate type of the same type. The two additional corporate certificate types contain the words **Additional 1** and **Additional 2**. These words will not appear in any of the related certificate pages or documents that are generated following certificate issuance.
12. When done, click **Apply** to continue.



13. The Certificate Type(s) you selected will be added to the Certifications tab. Click **Next** to continue.



14. The **Certifications** tab is updated to reflect a green checkmark.
15. Your application process will advance to the **Stamps** tab.
16. Select an **Authorized Inspection Agency** from the list of AIA Organizations by clicking on the down arrow. Select the Authorized Inspection Agency.
17. Click on the **Download Supplemental Form** link.
18. The **Supplemental Application Form** is downloaded to your local drive.
19. Complete the supplemental form.
20. Save the completed form on your local drive.
21. Click the **Upload Supplemental Form (PDF)** link.
22. When done, click **Next** to continue.



23. The **Stamps** tab is updated to reflect a green checkmark. The application data processing will advance to the **Travel** tab.
24. The **Company Name** is displayed as a link under the Location Name label. Click on the link.

Details Finance

Policies Certifications Stamps **Travel** Billing Review

Travel Recommendation

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Not Complete

[Add New Location](#)

Previous Next

25. The **Travel Recommendation Detail** form is presented.
26. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
27. You must enter the information for all required fields which are denoted with a red * asterisks.
28. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
29. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
30. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. []

Save

31. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
32. When done, click **Save** to continue.

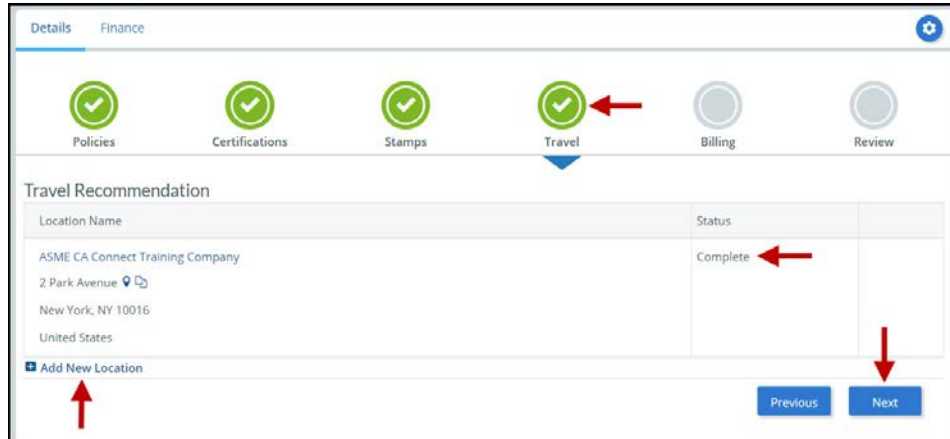
Please review the addresses below.

Hotel

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States
<input checked="" type="checkbox"/> Use Valid USPS Address	

Save Cancel

33. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
34. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
35. Confirm that the status for all locations is **Complete**, then click **Next** to continue.



36. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
37. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
38. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
39. When done, click **Next** to continue.

Details Finance

Policies Certifications Stamps Travel **Billing** Review

Billing
A retainer is billed to cover cost associated with the review/survey. Any left over remittance will be refunded.

Billing Address
Use Plant Address Use Mailing Address

Address Line 1
Address Line 1

Address Line 2
Address Line 2

Address Line 3
Address Line 3

Country
Select Country

City

Zip/Postal Code

Contact/Attention

Phone Number
+ ext.

Company Banking Details
Please provide the following information to allow ASME to refund any left over remittance.

Company Banking Details

Bank Account Name / Beneficiary

ABA Routing Number

Billing Contact Email

Account Number / IBAN #

SWIFT Code / BIC

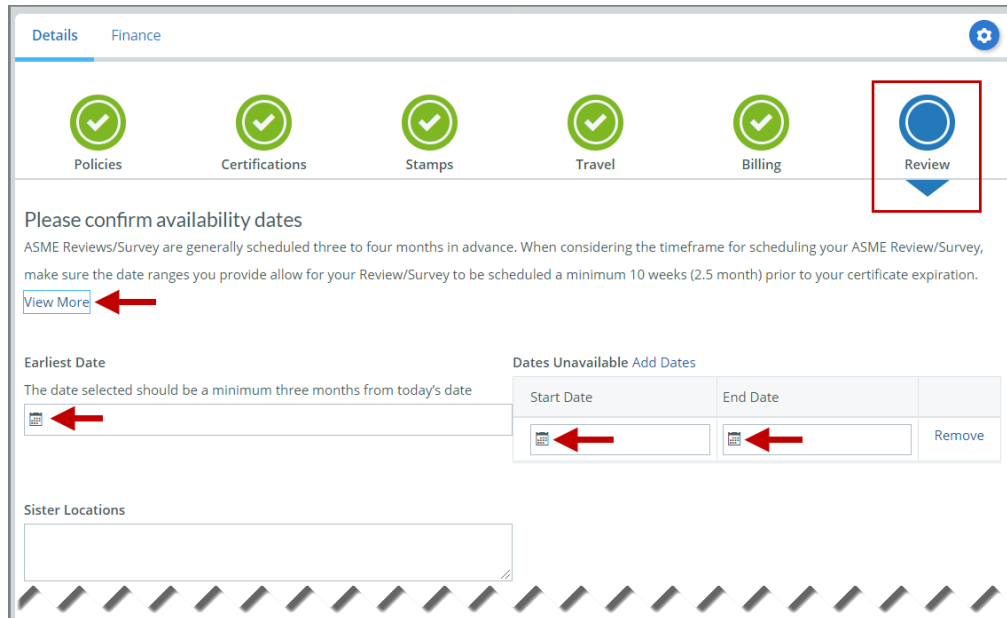
Bank Transit Number

Tax ID Number

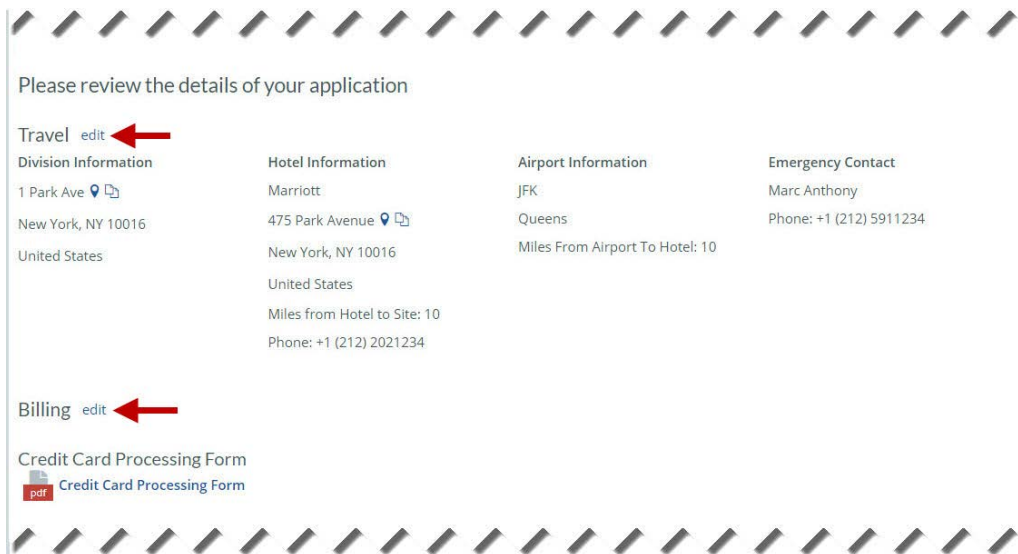
Credit Card Processing Form
Credit Card Processing Form

Previous Save Next

40. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
41. The **Review tab** displays a summary of the information that was entered in each of the tabs.
42. Click the **View More** link to display additional information on availability dates.
43. Enter the **Earliest Date** that your company will be available for the review. Please note the dates you enter must be a minimum of three months in the future.
44. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



45. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
46. Select the **Edit** links to modify any of the information you entered.
47. Click on the **Credit Card Processing Form** to download the form if needed.



48. Scroll down the tab and select the **Upload Company Manual** link. Locate the manual on your local computer and upload the file.
49. Select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.

50. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
51. Select the **Upload Agreement Form** link.
52. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
53. Click **Save** to continue.

Banking Details

Bank Name:

ABA Routing Number:

Account Number/IBAN #:

Swift Code:

Bank Transit Number:

Bank Account Name:

Tax ID Number:

Contact/Attention Name: Contxxx

Contact/Attention Email:

Billing Address

1 Park Ave

New York, NY 10016

United States

Please upload your company manual

Instructions: Upload your company manual via the upload box below.

Please upload only your Company Manual. No other forms should be submitted via this upload box.

Upload Company Manual

Please print, sign and upload the Agreement Form

Instructions: Please click the "Print Agreement" button, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it. Scan the signed form and save it as a pdf file on your computer. Finally, upload the scanned document via the upload box located below the "Print Agreement" button.

Please upload only your completed Print Agreement Form. No other forms should be submitted via this upload box.

Download Agreement Form

Upload Agreement Form

Previous Save

Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

IMPORTANT: This is the only opportunity you will have to alter any of the information prior to submission of the application. After the application is submitted, in order to make any changes, you will need to submit a change request to ASME.

Previous Save Submit

54. You will be redirected to the **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.

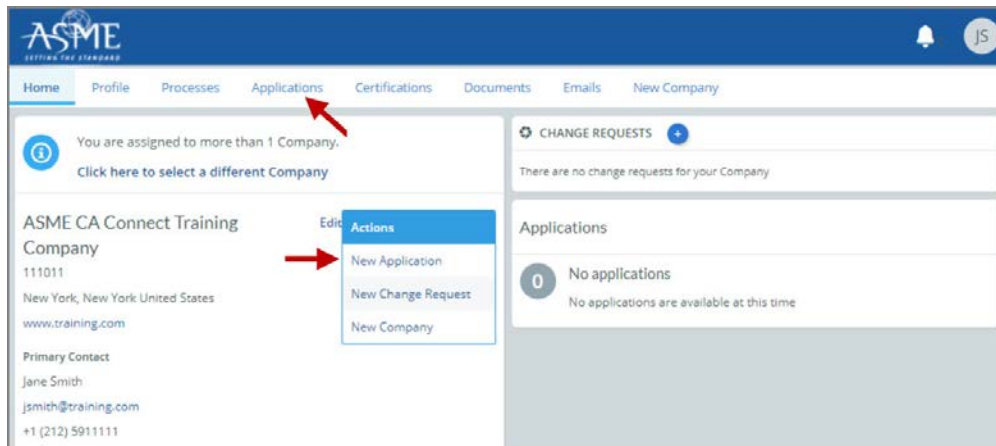
55. Click the blue gear icon and select the **Print Document** link.



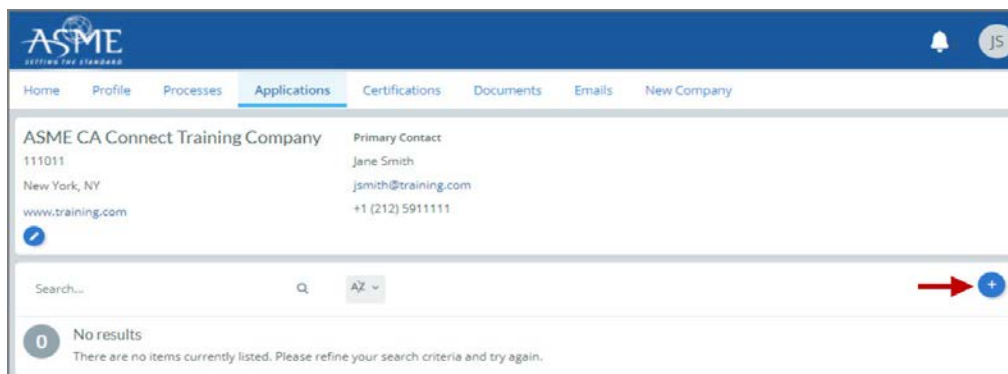
QSC Program (Corporate and Sites) – New Application

The information required to complete and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile**, **Certifications**, **Stamps**, **Travel**, **Billing**, and **Review**. Each tab consists of specific application details and downloading/uploading of files that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

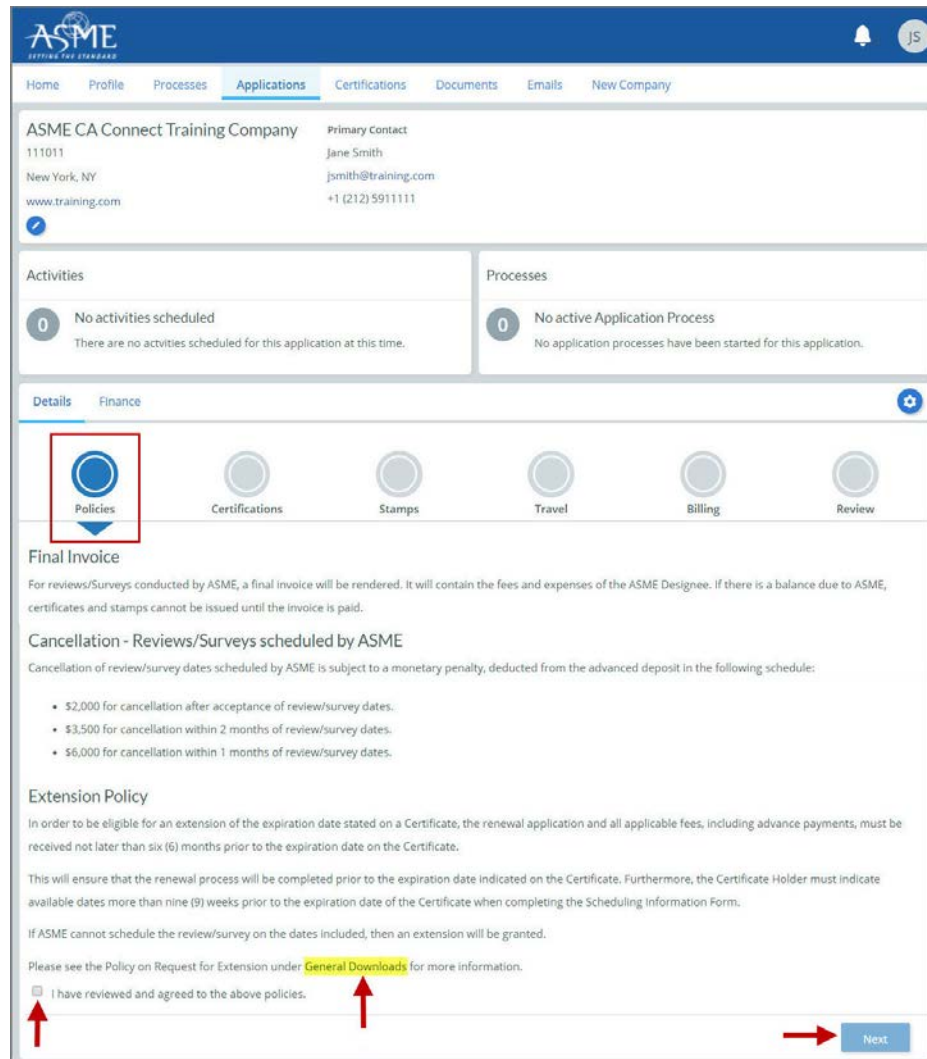
1. To begin the process of applying for certification, you must be logged into CA Connect as the company's Primary Contact.
2. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.



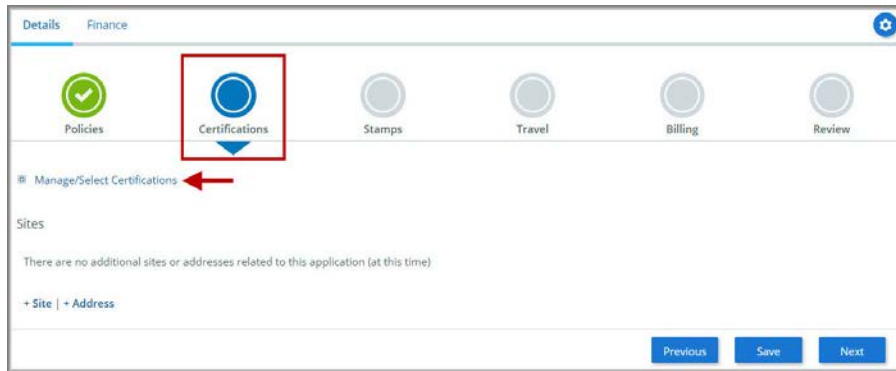
3. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.



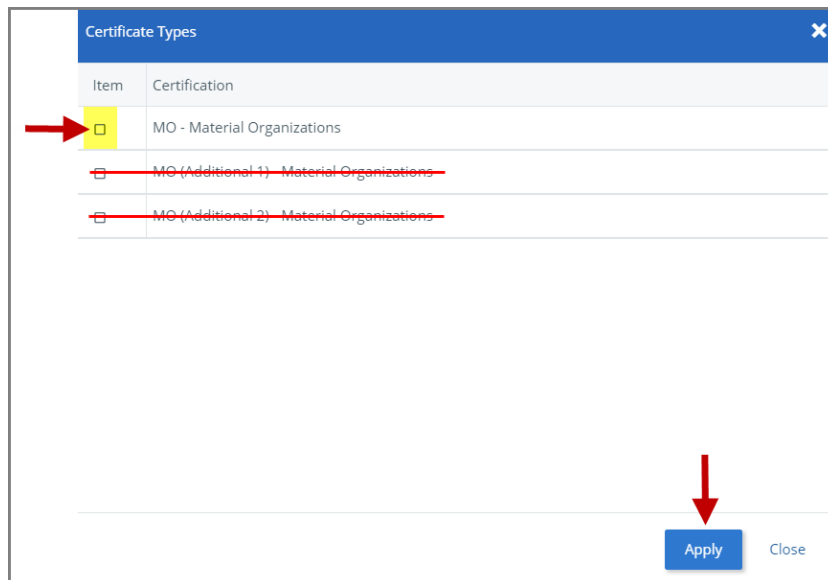
4. The first application tab is the **Policies tab**. Review all information displayed on the tab.
5. Scroll down the page to the **Extension Policy** section.
6. If you want to see the policy relating to a Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
7. Check **I have reviewed and agreed to the above policies** checkbox.
8. Click **Next** to continue.



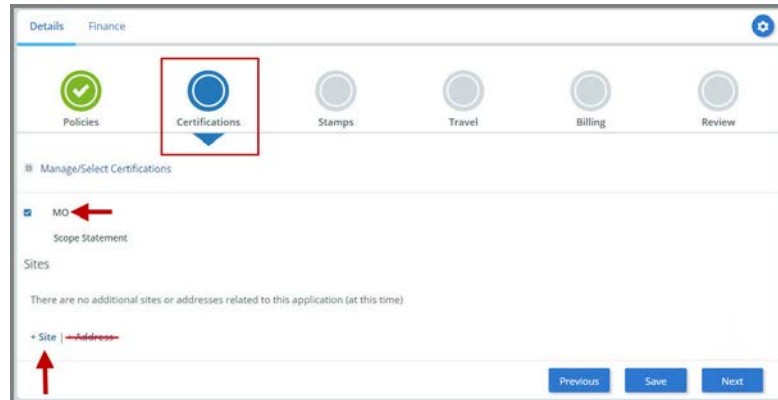
9. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications tab**.
10. Click the **Manage/Select Certifications** link or checkbox.



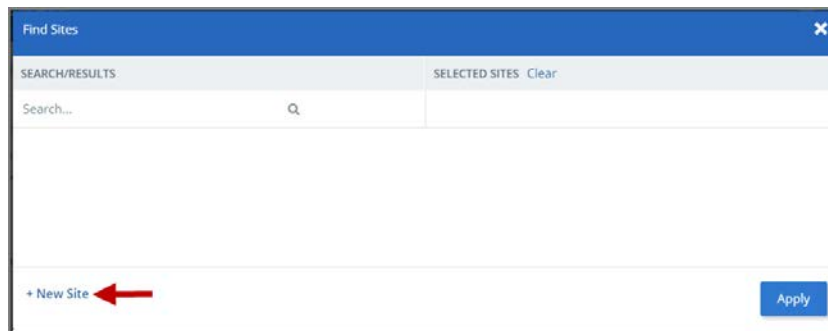
11. The Certificate Types form is displayed. Select the MO certificate type.
Note: If you are applying for a Nuclear Corporate certificate and a Nuclear Site Extension certificate with the same certificate type, select the corporate certificate type only. **DO NOT** select certificate types that contain the words **Additional 1** and **Additional 2**.
12. When done, click **Apply** to continue.



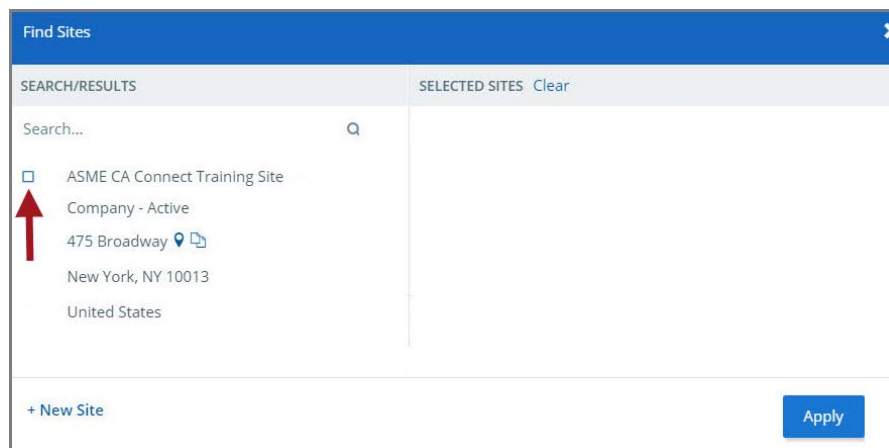
13. Select the **Site** link on the Certifications tab.



14. Select the **New Site** link to add the details required for the site certificate.



15. If the system locates a Company record that was previously for your company, the Company Name and Location will be imported and shown on the Find Sites page.
- Select the checkbox preceding the Company Name to link the Company record to the site certification you are applying for.
16. To add a **New Site** for the site certification you are applying for, click the **New Site** link.



17. Enter the **Company** and **Address location** details for the **site certificate** in the designated fields.
18. When done, click **Save** to continue.

The screenshot shows the 'Find Sites' form with the following fields and their corresponding red arrows:

- Company Name (left arrow)
- Status (down arrow)
- Website (left arrow)
- Type (down arrow)
- Primary Phone (up arrow)
- Ph (up arrow)
- ext. (up arrow)
- Extension (right arrow)
- Select Country (down arrow)
- Address Line 1 (left arrow)
- Address Line 2 (left arrow)
- City (up arrow)
- Select State (down arrow)
- Postal Code (up arrow)
- Save button (down arrow)

19. The site certification details you entered will be displayed on the Find Sites form.
 - a. If you are applying for multiple site certificates for different locations. Click the **New Site** link again and add the company and location details for each site.
 - b. When done, click **Apply** to continue.

The screenshot shows the 'Find Sites' form with the following elements:

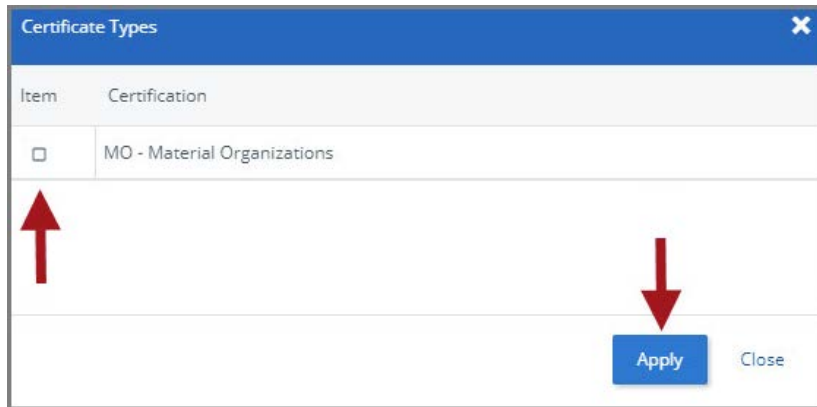
- SEARCH/RESULTS: Search... (with magnifying glass icon)
- SELECTED SITES: Clear
- ASME CA Connect Training Company (checked)
- Company - Active
- 2 Park Avenue (with location pin icon)
- New York, NY 10016
- United States
- + New Site
- Apply button (with red arrow pointing to it)

20. You will be redirected back to the Certifications tab where the Company record details are added.
21. Click the **Manage/Select Certifications** link.

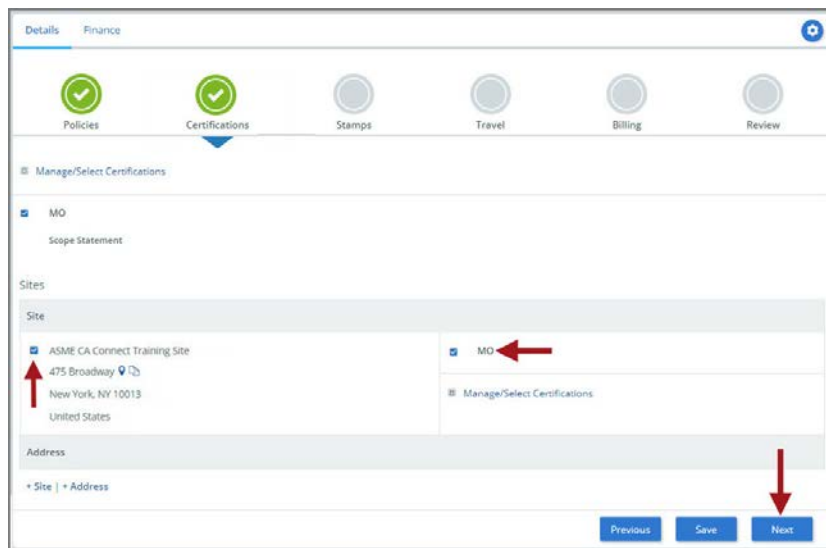
The screenshot shows the 'Details' page for a company record with the following elements:

- Details Finance (with gear icon)
- Polices (with checkmark icon)
- Certifications (with blue circle icon and red box around it)
- Stamps (with stamp icon)
- Travel (with travel icon)
- Billing (with bill icon)
- Review (with review icon)
- # Manage/Select Certifications
- MID
- Scope Statement
- Sites
- Site
- ASME CA Connect Training Company
- 2 Park Avenue (with location pin icon)
- New York, NY 10016
- United States
- Manage/Select Certifications (with red arrow pointing to it)
- Address
- + Site | + Address
- Previous Save Next

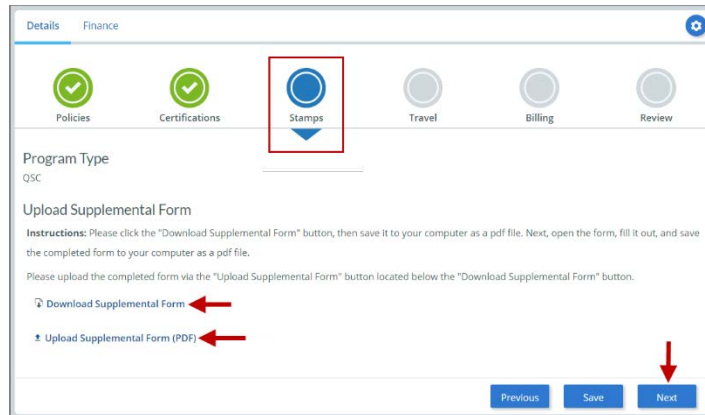
22. Select the Certificate Type, then click **Apply** to continue.



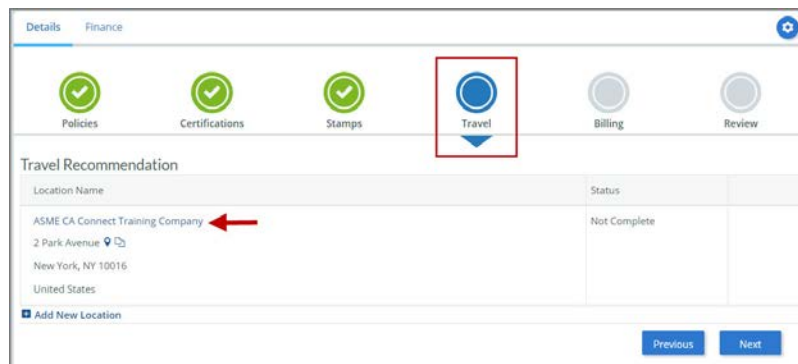
23. The Certificate Type will be added to the Site details. Click **Next** to continue.



24. The **Certifications** tab is updated to reflect a green checkmark. The application data processing will advance to the **Stamps** tab.
25. Select an **Authorized Inspection Agency** from the list of AIA Organizations by clicking on the down arrow. Select the Authorized Inspection Agency.
26. Click on the **Download Supplemental Form** link.
27. The **Supplemental Application Form** is downloaded to your local drive.
28. Complete the supplemental form.
29. Save the completed form on your local drive.
30. Click the **Upload Supplemental Form (PDF)** link.
31. Locate the completed supplemental form on your local drive and upload the form.
32. Enter the **number of ASME Single Certification Marks** you like to receive.
33. Check each checkbox that applies to the certification. The **Stamp Confirmed by Applicant** checkbox is required.
34. When done, click **Next** to continue.



35. The **Stamps** tab is updated to reflect a green checkmark. The application data processing will advance to the **Travel tab**.
36. The **Company Name** is displayed as a link under the Location Name label. Click on the link.



37. The **Travel Recommendation Detail** form is presented.
38. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
39. You must enter the information for all required fields which are denoted with a red * asterisks.
40. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
41. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
42. When done, click **Save** to continue.

Travel Recommendation Detail ←

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. []

Fax
+ [] [] [] []

Miles from hotel to site *

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. []

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

→ **Save**

43. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
44. When done, click **Save** to continue.

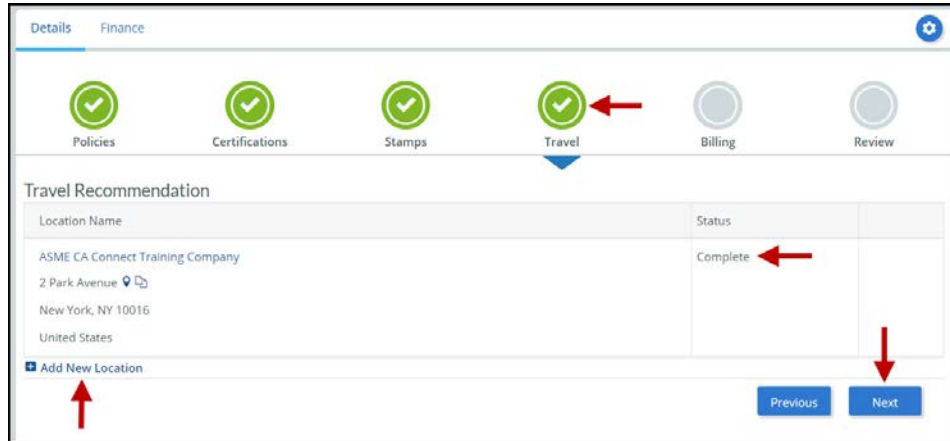
Please review the addresses below.

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

→ **Save** [Cancel](#)

45. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
46. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
47. Confirm that the status for all locations is **Complete**, then click **Next** to continue.



48. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
49. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
50. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
51. When done, click **Next** to continue.

Details Finance

Policies Certifications Stamps Travel **Billing** Review

Billing
A retainer is billed to cover cost associated with the review/survey. Any left over remittance will be refunded.

Billing Address
Use Plant Address Use Mailing Address

Address Line 1
Address Line 1

Address Line 2
Address Line 2

Address Line 3
Address Line 3

Country
Select Country

City

Zip/Postal Code

Contact/Attention

Phone Number
+ ext.

Company Banking Details
Please provide the following information to allow ASME to refund any left over remittance.

Company Banking Details

Bank Account Name / Beneficiary

ABA Routing Number

Billing Contact Email

Account Number / IBAN #

SWIFT Code / BIC

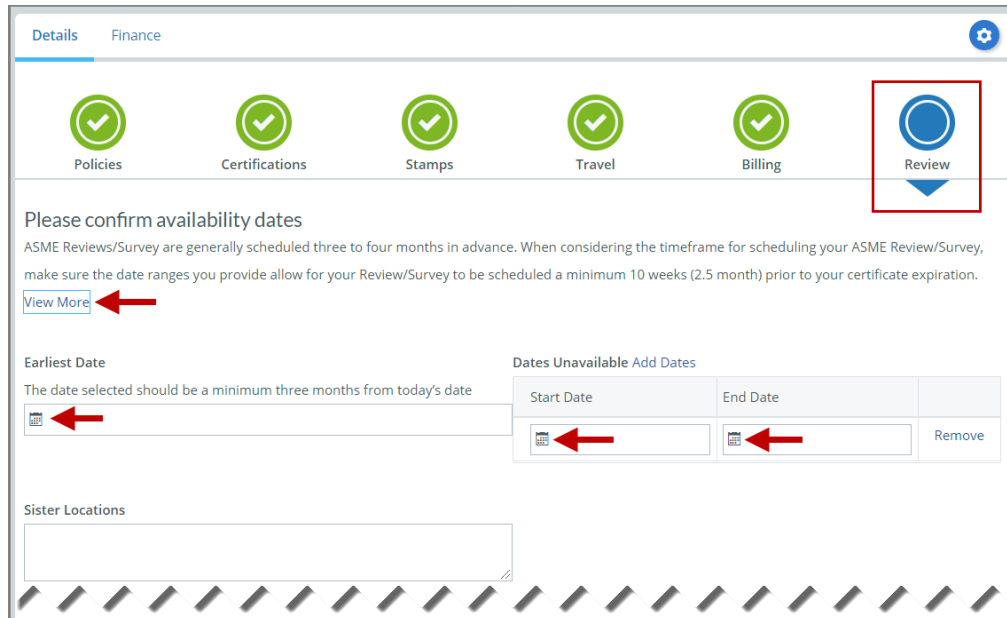
Bank Transit Number

Tax ID Number

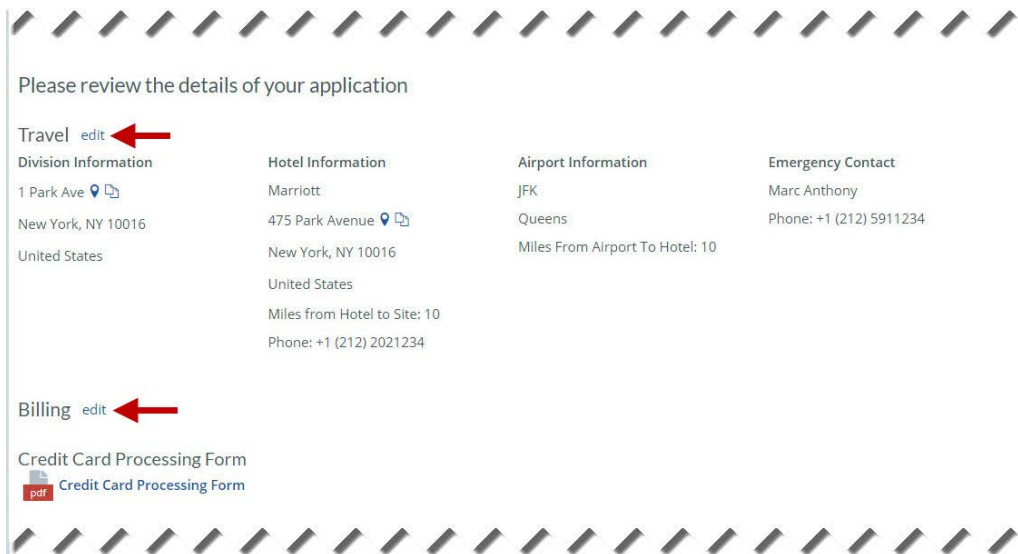
Credit Card Processing Form
Credit Card Processing Form

Previous Save Next

52. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
53. The **Review tab** displays a summary of the information that was entered in each of the tabs.
54. Click the **View More** link to display additional information on availability dates.
55. Enter the **Earliest Date** that your company will be available for the review. Please note the dates you enter must be a minimum of three months in the future.
56. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



57. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
58. Select the **Edit** links to modify any of the information you entered.
59. Click on the **Credit Card Processing Form** to download the form if needed.



60. Scroll down the tab and select the **Upload Company Manual** link. Locate the manual on your local computer and upload the file.
61. Select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.

62. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
63. Select the **Upload Agreement Form** link.
64. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
65. Click **Save** to continue.

The screenshot shows a web form with two columns of input fields. The left column is titled 'Banking Details' and includes fields for Bank Name, ABA Routing Number, Account Number/IBAN #, Swift Code, Bank Transit Number, Bank Account Name, Tax ID Number, Contact/Attention Name (pre-filled with 'Contxxx'), and Contact/Attention Email. The right column is titled 'Billing Address' and includes fields for address (pre-filled with '1 Park Ave'), city/state (pre-filled with 'New York, NY 10016'), and country (pre-filled with 'United States').

Below the input fields, there are two instruction sections. The first section is titled 'Please upload your company manual' and includes an 'Upload Company Manual' button with a red arrow pointing to it. The second section is titled 'Please print, sign and upload the Agreement Form' and includes a 'Download Agreement Form' button and an 'Upload Agreement Form' button, both with red arrows pointing to them. At the bottom right of the form, there are 'Previous' and 'Save' buttons, with a red arrow pointing to the 'Save' button.

Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

IMPORTANT: This is the only opportunity you will have to alter any of the information prior to submission of the application. After the application is submitted, in order to make any changes, you will need to submit a change request to ASME.

The screenshot shows a web form with three buttons at the bottom right: 'Previous', 'Save', and 'Submit'. A red arrow points to the 'Submit' button.

66. You will be redirected to the **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.

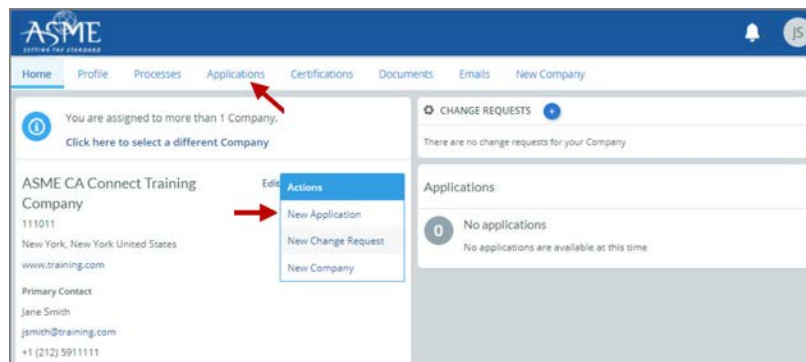
67. Click the blue gear icon and select the **Print Document** link.



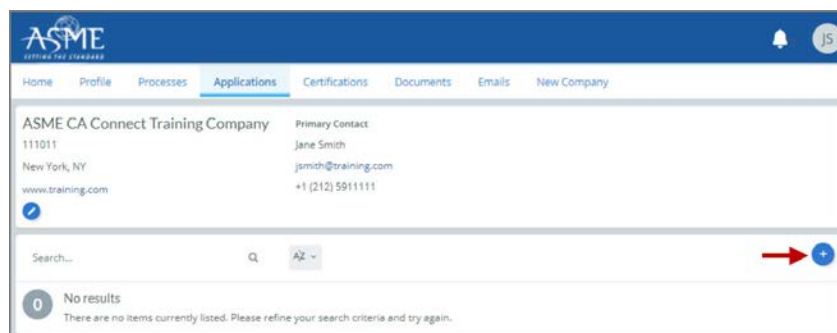
RTP Program – New Application

The information required to complete and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile**, **Certifications**, **Stamps**, **Travel**, **Billing**, and **Review**. Each tab consists of specific application details and downloading/uploading of files that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

1. To begin the process of applying for certification, you must be logged into CA Connect as the company's Primary Contact.
2. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.

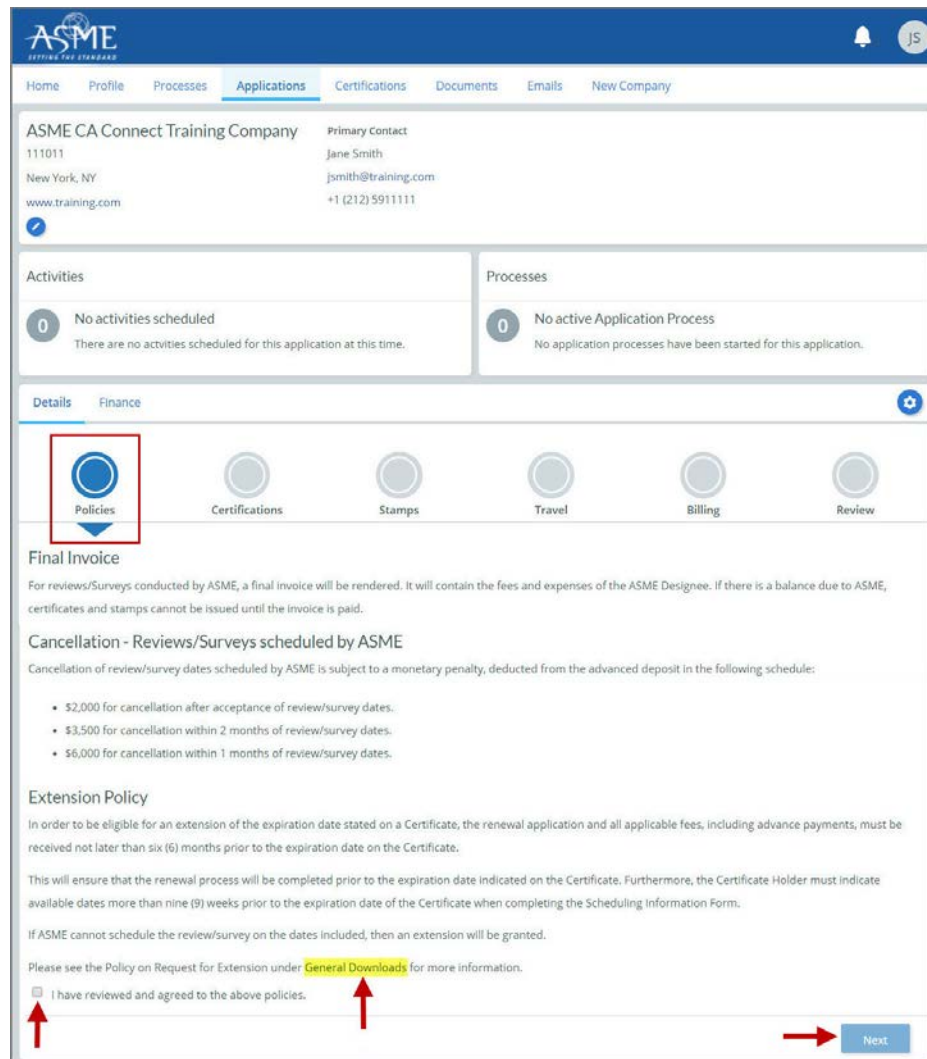


3. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.

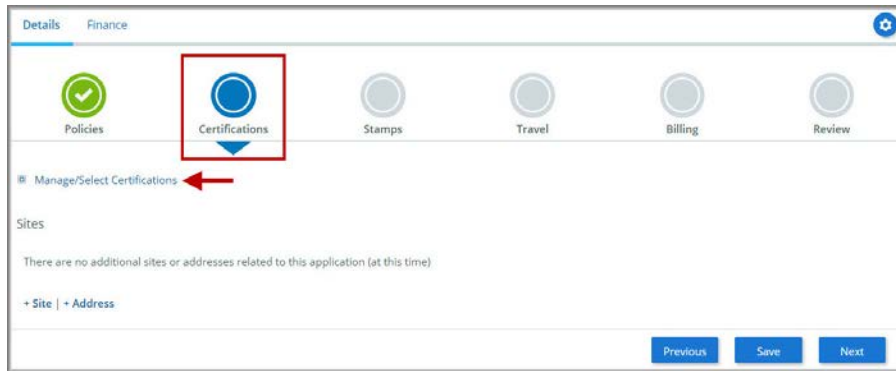


4. The first application tab is the **Policies tab**. Review all information displayed on the tab.
5. Scroll down the page to the **Extension Policy** section.

6. If you want to see the policy relating to a Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
7. Check **I have reviewed and agreed to the above policies** checkbox.
8. Click **Next** to continue.



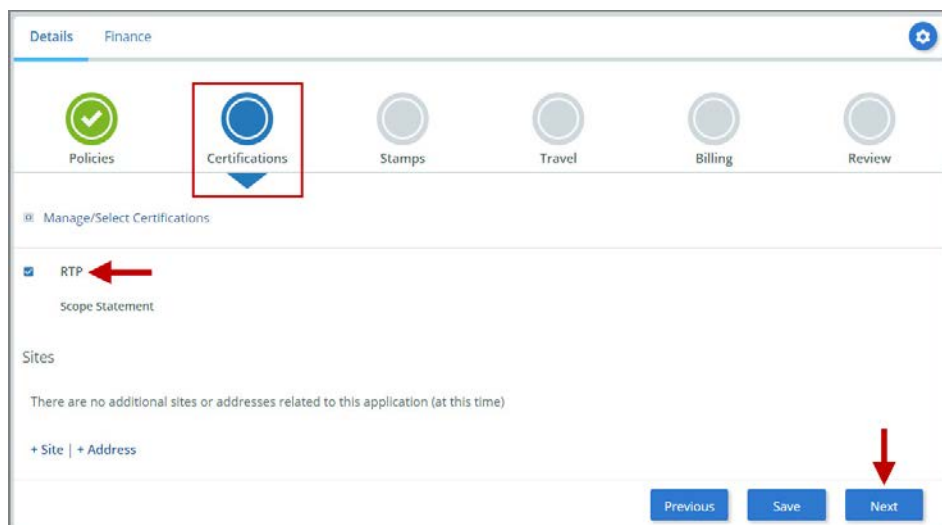
9. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications tab**.
10. Click the **Manage/Select Certifications** link or checkbox.



11. The Certificate Types form is displayed. Select the RTP certificate type.
12. When done, click **Apply** to continue.

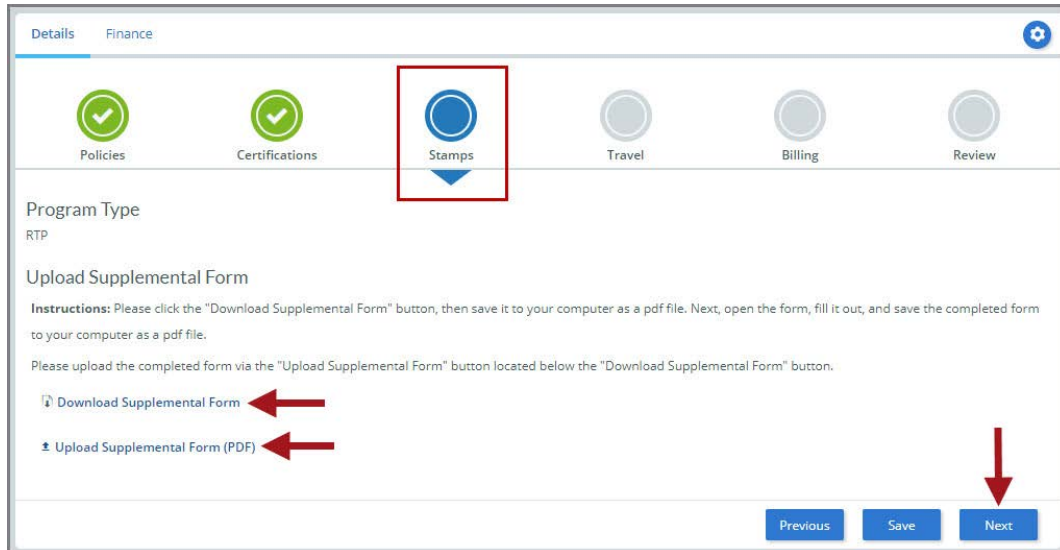


13. The RTP Certificate Type will be added to the Certifications tab. Click **Next** to continue.



14. The **Certifications** tab is updated to reflect a green checkmark. The application data processing will advance to the **Stamps** tab.
15. Click on the **Download Supplemental Form** link.
16. The **Supplemental Application Form** is downloaded to your local drive.

17. Complete the supplemental form.
18. Save the completed form on your local drive.
19. Click the **Upload Supplemental Form (PDF)** link.
20. Locate the completed supplemental form on your local drive and upload the form.
21. When done, click **Next** to continue.



22. The **Stamps** tab is updated to reflect a green checkmark. The application data processing will advance to the **Travel tab**.
23. The **Company Name** is displayed as a link under the Location Name label. Click on the link.



24. The **Travel Recommendation Detail** form is presented.
25. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
26. You must enter the information for all required fields which are denoted with a red * asterisks.
27. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
28. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.

29. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. []

Save

30. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.

31. When done, click **Save** to continue.

Please review the addresses below.

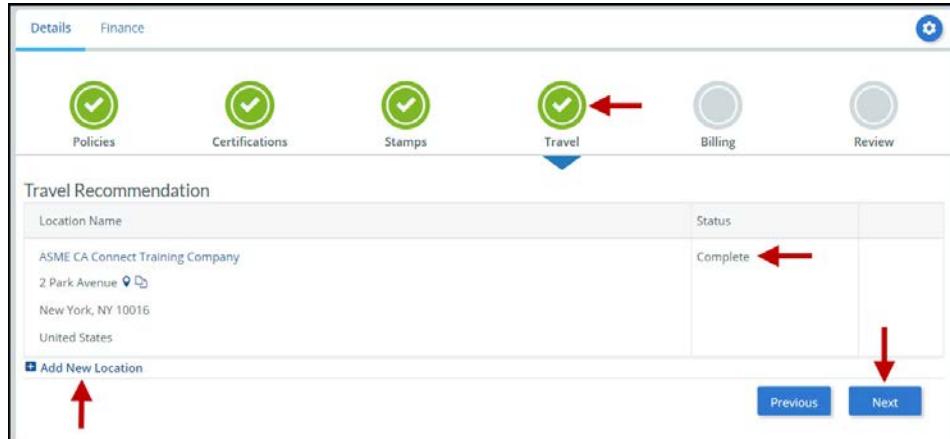
Hotel

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

Save Cancel

32. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
33. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
34. Confirm that the status for all locations is **Complete**, then click **Next** to continue.



35. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
36. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
37. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
38. When done, click **Next** to continue.

Details Finance

Policies Certifications Stamps Travel **Billing** Review

Billing
A retainer is billed to cover cost associated with the review/survey. Any left over remittance will be refunded.

Billing Address
Use Plant Address Use Mailing Address

Address Line 1
Address Line 1

Address Line 2
Address Line 2

Address Line 3
Address Line 3

Country
Select Country

City

Zip/Postal Code

Contact/Attention

Phone Number
+ ext.

Company Banking Details
Please provide the following information to allow ASME to refund any left over remittance.

Company Banking Details

Bank Account Name / Beneficiary

ABA Routing Number

Billing Contact Email

Account Number / IBAN #

SWIFT Code / BIC

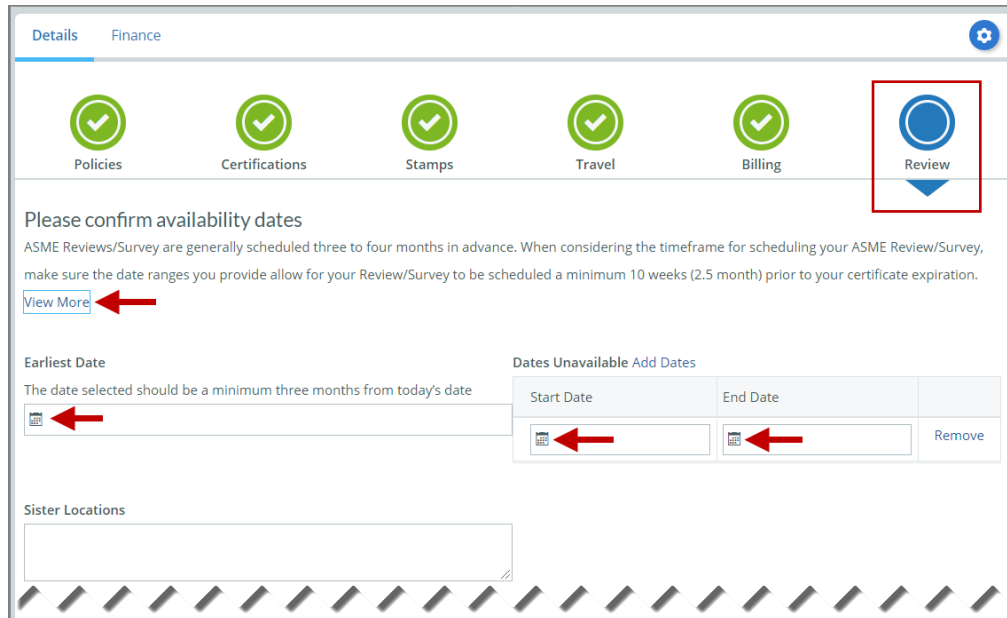
Bank Transit Number

Tax ID Number

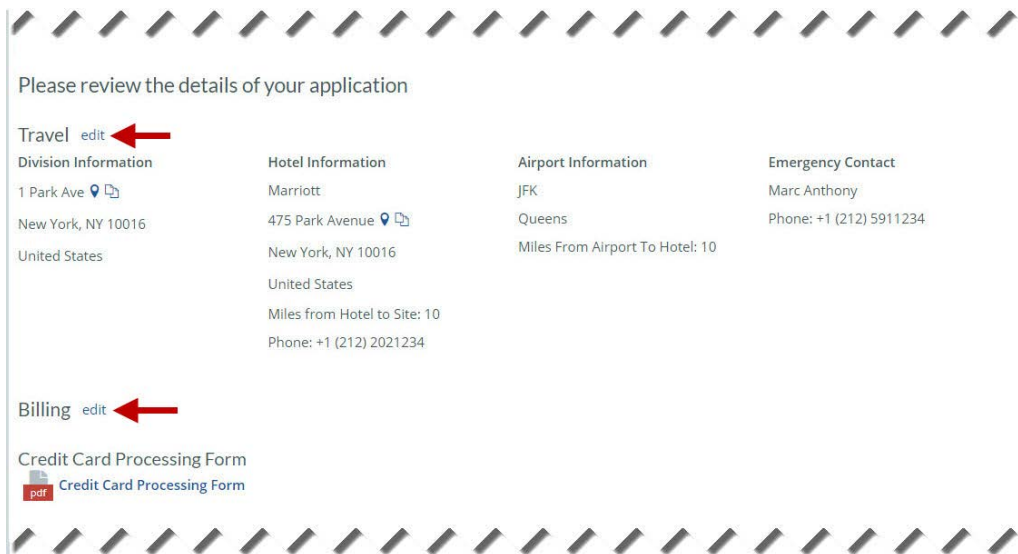
Credit Card Processing Form
Credit Card Processing Form

Previous Save Next

39. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
40. The **Review tab** displays a summary of the information that was entered in each of the tabs.
41. Click the **View More** link to display additional information on availability dates.
42. Enter the **Earliest Date** that your company will be available for the review. Please note the dates you enter must be a minimum of three months in the future.
43. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



44. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
45. Select the **Edit** links to modify any of the information you entered.
46. Click on the **Credit Card Processing Form** to download the form if needed.



47. Scroll down the tab and select the **Upload Company Manual** link. Locate the manual on your local computer and upload the file.
48. Select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.

49. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
50. Select the **Upload Agreement Form** link.
51. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
52. Click **Save** to continue.

The screenshot shows a web form with two columns of fields. The left column is titled 'Banking Details' and includes fields for Bank Name, ABA Routing Number, Account Number/IBAN #, Swift Code, Bank Transit Number, Bank Account Name, Tax ID Number, Contact/Attention Name (Contxxx), and Contact/Attention Email. The right column is titled 'Billing Address' and includes fields for 1 Park Ave, New York, NY 10016, and United States.

Below the fields, there are two instruction sections. The first section is titled 'Please upload your company manual' and includes instructions to upload the company manual via an upload box. A red arrow points to the 'Upload Company Manual' link. The second section is titled 'Please print, sign and upload the Agreement Form' and includes instructions to print, sign, and upload the agreement form. Red arrows point to the 'Download Agreement Form' and 'Upload Agreement Form' links.

At the bottom right of the form, there are two buttons: 'Previous' and 'Save'. A red arrow points to the 'Save' button.

Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

IMPORTANT: This is the only opportunity you will have to alter any of the information prior to submission of the application. After the application is submitted, in order to make any changes, you will need to submit a change request to ASME.

The screenshot shows a web form with three buttons at the bottom right: 'Previous', 'Save', and 'Submit'. A red arrow points to the 'Submit' button.

53. You will be redirected to the **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.

54. Click the blue gear icon and select the **Print Document** link.

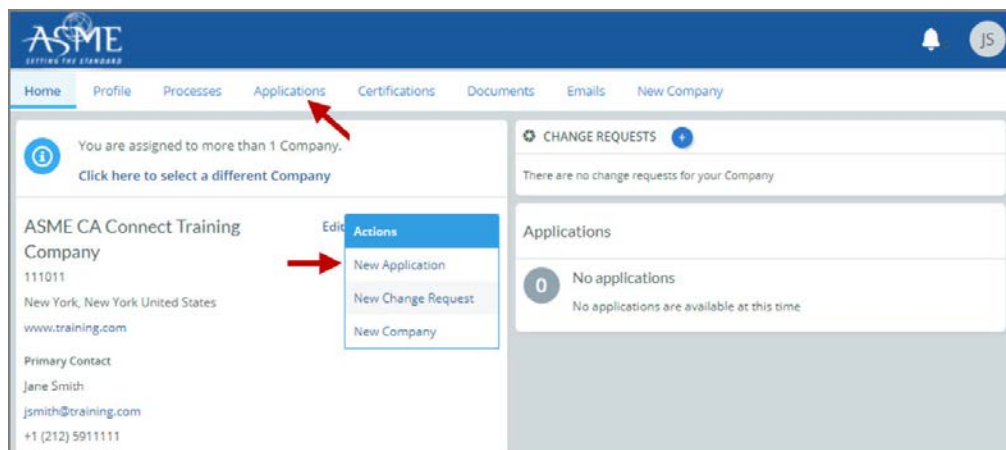


Create Renewal Application

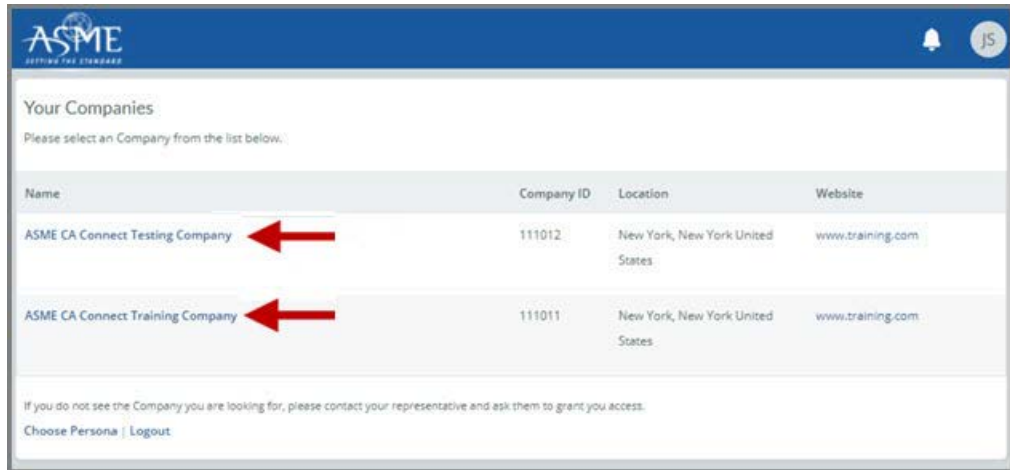
AIA Program - Renewal

The information required to process information and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile, Certifications, Stamps, Travel, Billing, and Review**. Each tab consists of specific application details and downloading/uploading that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

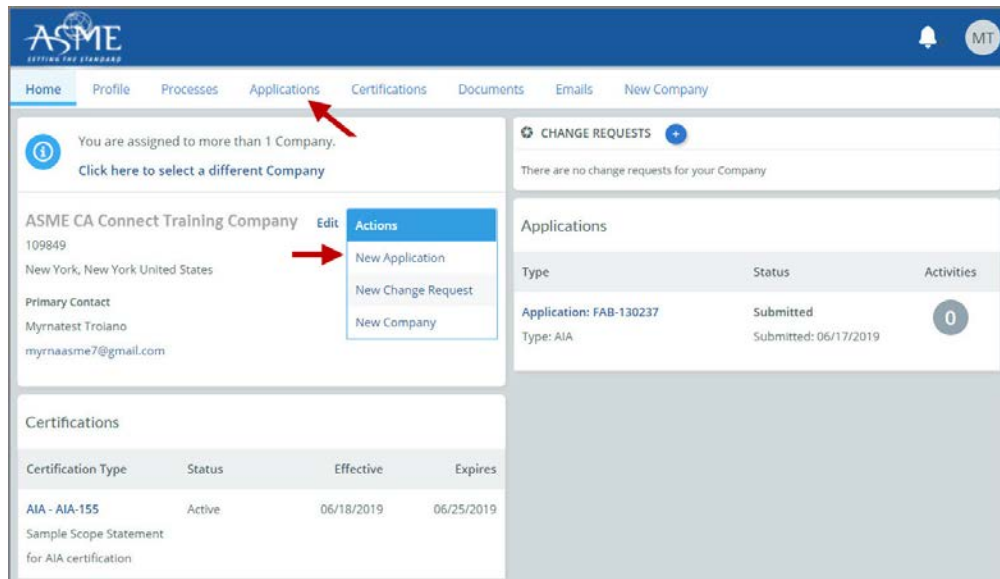
1. To begin the process of renewing your certification, you must be logged into CA Connect as the company's Primary Contact.
2. Once you log in,
 - a. If you are associated with a single company you will be directed to your Company Dashboard.



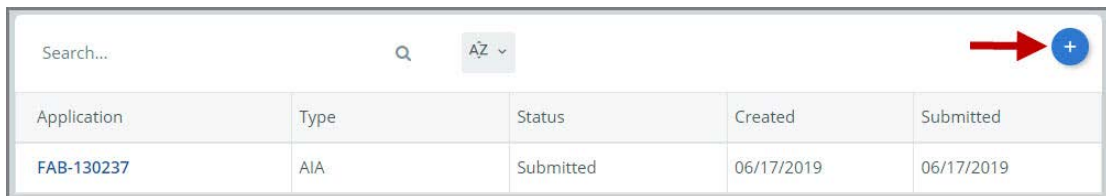
- b. If you are associated with multiple companies, you will first be directed to a list of your companies.
 - i. Once you select the Company, you will be directed to the Company Dashboard.



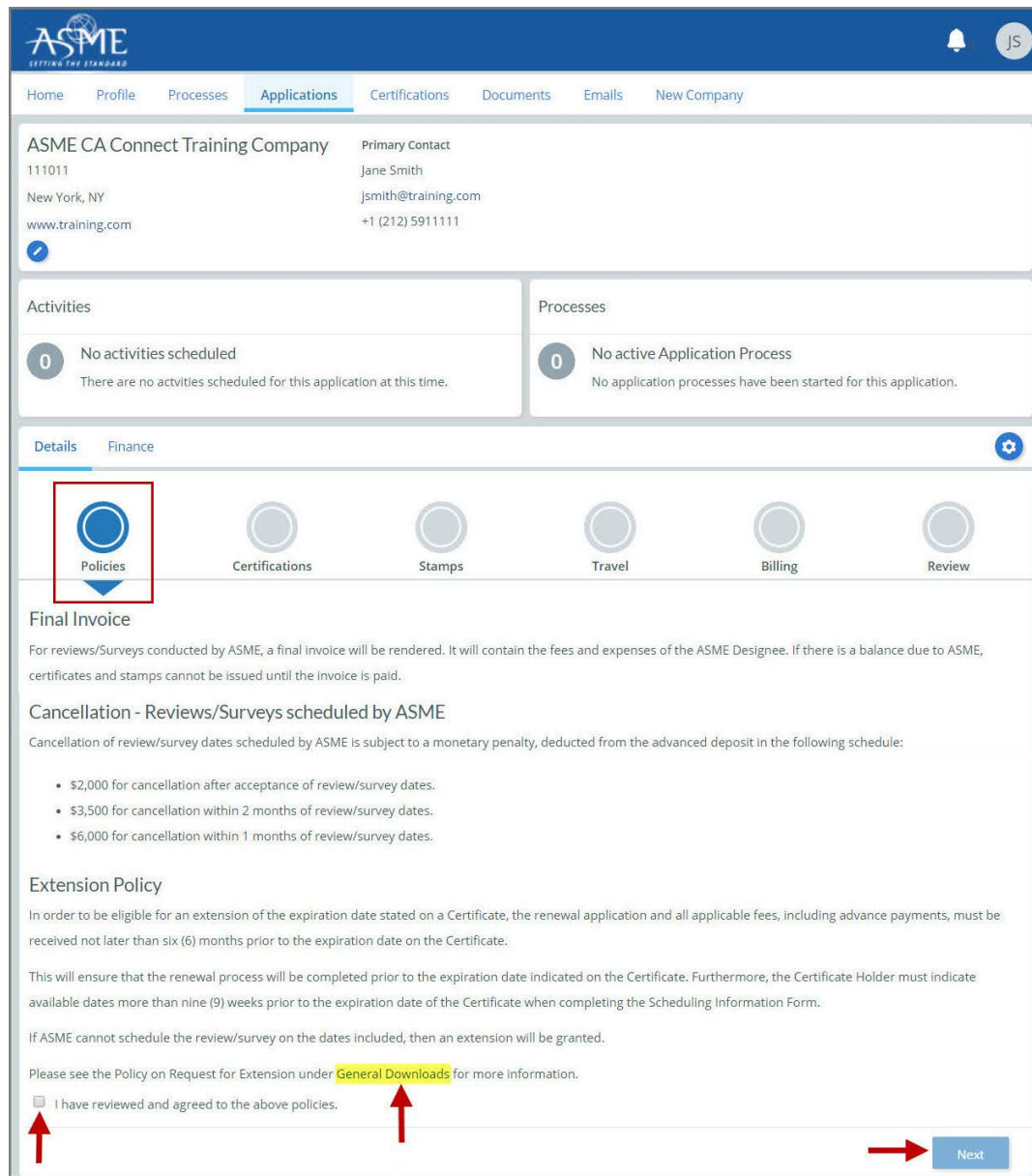
3. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.



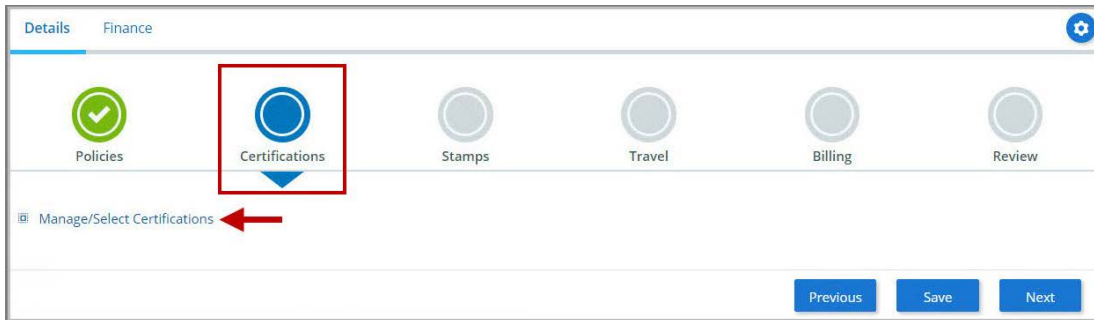
4. The **Applications** tab will opens so that you can begin to create a renewal application for certification you hold.
5. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.



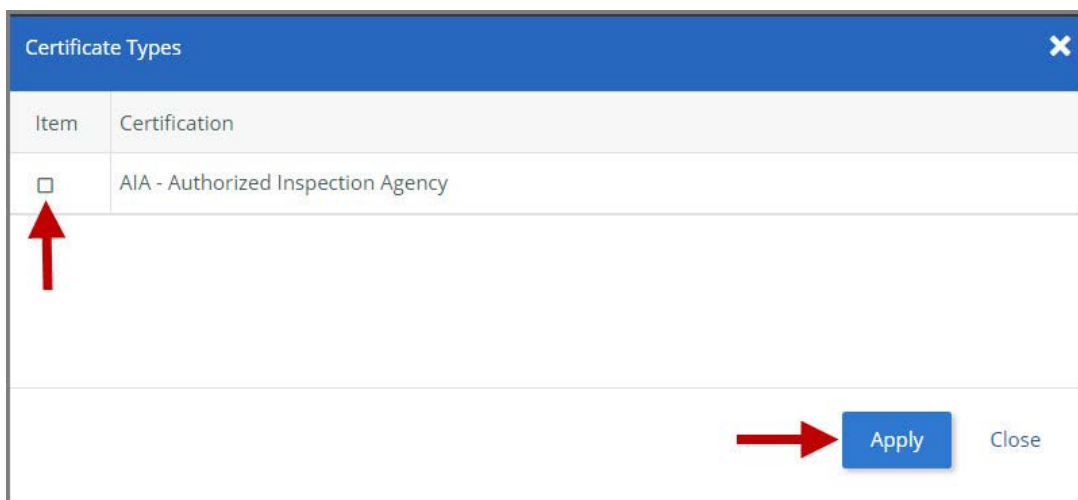
6. The first application tab is the **Policies tab**. Review all information displayed on the tab.
7. Scroll down the page to the **Extension Policy** section.
8. If you want to see the policy relating to a Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
9. Check **I have reviewed and agreed to the above policies** checkbox.
10. Click **Next** to continue.



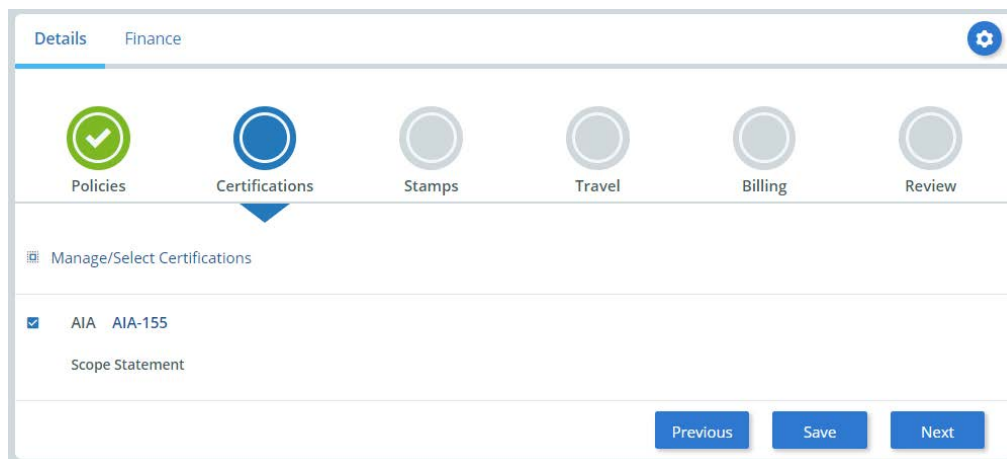
11. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications tab**.
12. Click the **Manage/Select Certifications** link or checkbox.



13. The Certificate Types form is displayed. Select the **AIA-Authorized Inspection Agency** Certificate Type.
14. When done, click **Apply** to continue.



15. The AIA Certificate Type and Certificate Number that you are renewing will be added to the Certifications tab.
16. Click **Next** to continue.



17. The **Certifications** tab is updated to reflect a green checkmark. The application data processing will advance to the **Stamps** tab.

18. Click on the **Download Supplemental Form** link.
19. The **Supplemental Application Form** is downloaded to your local drive.
20. Complete the supplemental form.
21. Save the completed form on your local drive.
22. Click the **Upload Supplemental Form (PDF)** link.
23. Locate the completed supplemental form on your local drive and upload the form.
24. When done, click **Next** to continue.

Details Finance

Policies Certifications **Stamps** Travel Billing Review

Program Type
AIA

Upload Supplemental Form

Instructions: Please click the "Download Supplemental Form" button, then save it to your computer as a pdf file. Next, open the form, fill it out, and save the completed form to your computer as a pdf file.

Please upload the completed form via the "Upload Supplemental Form" button located below the "Download Supplemental Form" button.

[Download Supplemental Form](#)

[Upload Supplemental Form \(PDF\)](#)

Previous Save Next

25. The **Stamps** tab is updated to reflect a green checkmark. The application data processing will advance to the **Travel tab**.
26. The **Company Name** is displayed as a link under the Location Name label. Click on the link.

Details Finance

Policies Certifications Stamps **Travel** Billing Review

Travel Recommendation

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Not Complete

Previous Next

27. The **Travel Recommendation Detail** form is presented.
28. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
29. You must enter the information for all required fields which are denoted with a red * asterisks.
30. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
31. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
32. When done, click **Save** to continue.

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] ext. []

Fax
+ [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] ext. []

Save

33. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
34. When done, click **Save** to continue.

Please review the addresses below.

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

[Save](#) [Cancel](#)

35. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
36. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
37. Confirm that the status for all locations is **Complete**, then click **Next** to continue.

Details Finance

Policies Certifications Stamps **Travel** Billing Review

Travel Recommendation

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Complete

[Add New Location](#)

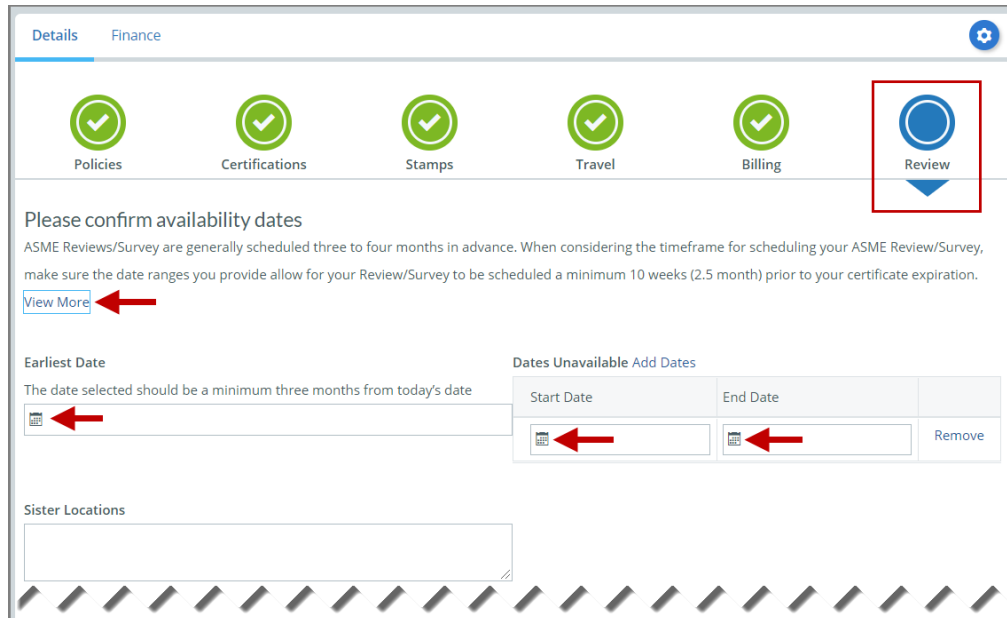
[Previous](#) [Next](#)

38. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
39. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
40. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.

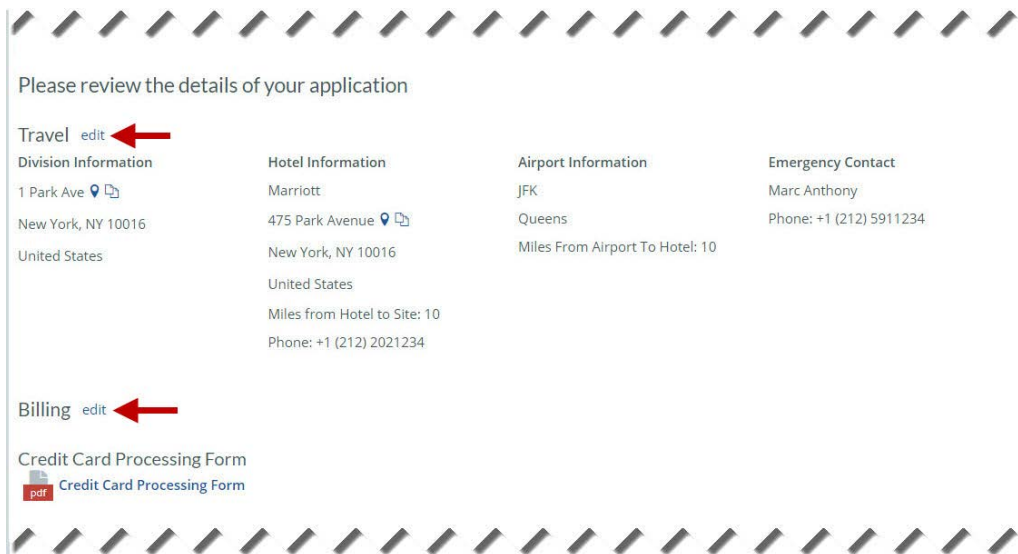
- b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
41. When done, click **Next** to continue.

The screenshot shows a web application interface with a navigation bar at the top containing tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The Billing tab is active and highlighted with a green checkmark and a red box. Below the navigation bar, the Billing section contains a heading and a sub-heading. The main content area is divided into two columns. The left column contains fields for Billing Address (Address Line 1, 2, 3, Country, City, Zip/Postal Code, Contact/Attention, Phone Number). The right column contains fields for Company Banking Details (Company Banking Details, Bank Account Name / Beneficiary, ABA Routing Number, Billing Contact Email, Account Number / IBAN #, SWIFT Code / BIC, Bank Transit Number, Tax ID Number). At the bottom of the form, there is a link for 'Credit Card Processing Form' with a PDF icon, and three buttons: 'Previous', 'Save', and 'Next'. Red arrows point to the 'Company Banking Details' section, the 'Credit Card Processing Form' link, and the 'Next' button.

42. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
43. The **Review tab** displays a summary of the information that was entered in each of the tabs.
44. Click the **View More** link to display additional information on availability dates.
45. Enter the **Earliest Date** that your company will be available for the review. Please note the dates you enter must be a minimum of three months in the future.
46. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



47. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
48. Select the **Edit** links to modify any of the information you entered.
49. Click on the **Credit Card Processing Form** to download the form if needed.



50. Scroll down the tab and select the **Upload Company Manual** link. Locate the manual on your local computer and upload the file.
51. Select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.

52. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
53. Select the **Upload Agreement Form** link.
54. Locate the signed agreement form on your local computer and upload the file.
 - b. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
55. Click **Save** to continue.

The screenshot shows a web form with two columns of fields. The left column is titled 'Banking Details' and includes fields for Bank Name, ABA Routing Number, Account Number/IBAN #, Swift Code, Bank Transit Number, Bank Account Name, Tax ID Number, Contact/Attention Name (with value 'Contxxx'), and Contact/Attention Email. The right column is titled 'Billing Address' and includes fields for address (1 Park Ave), city/state (New York, NY 10016), and country (United States). Below the fields are instructions for uploading a company manual and an agreement form. Red arrows point to the 'Upload Company Manual' link, the 'Download Agreement Form' link, the 'Upload Agreement Form' link, and the 'Save' button at the bottom right.

Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

IMPORTANT: This is the only opportunity you will have to alter any of the information prior to submission of the application. After the application is submitted, in order to make any changes, you will need to submit a change request to ASME.

The screenshot shows a web form with three buttons at the bottom right: 'Previous', 'Save', and 'Submit'. A red arrow points to the 'Submit' button.

56. You will be redirected to the **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.

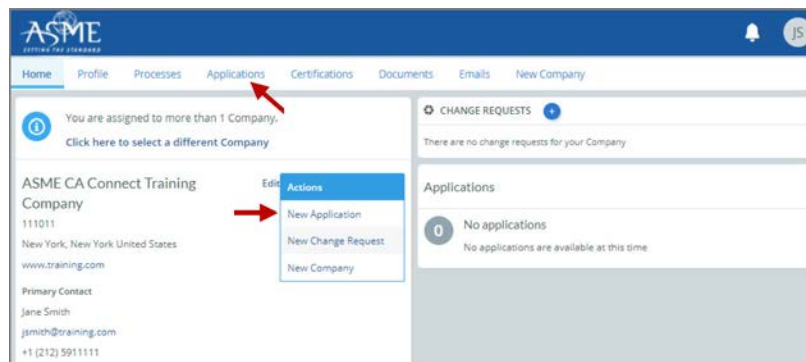
57. Click the blue gear icon and select the **Print Document** link.



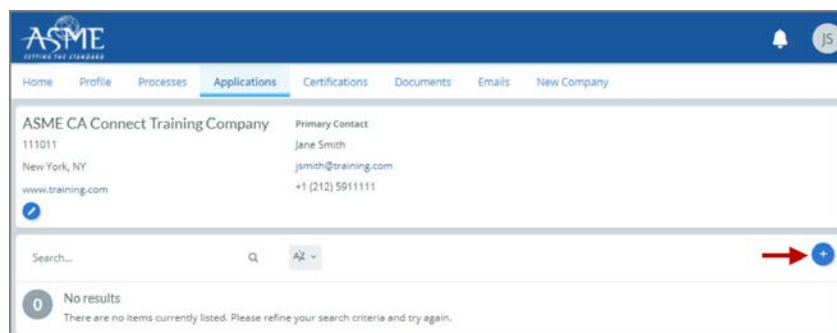
Boiler Program – Renewal and New Application

The information required to complete and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile**, **Certifications**, **Stamps**, **Travel**, **Billing**, and **Review**. Each tab consists of specific application details and downloading/uploading of files that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

1. To begin the process of renewing your certification, you must be logged into CA Connect as the company's Primary Contact.
2. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.

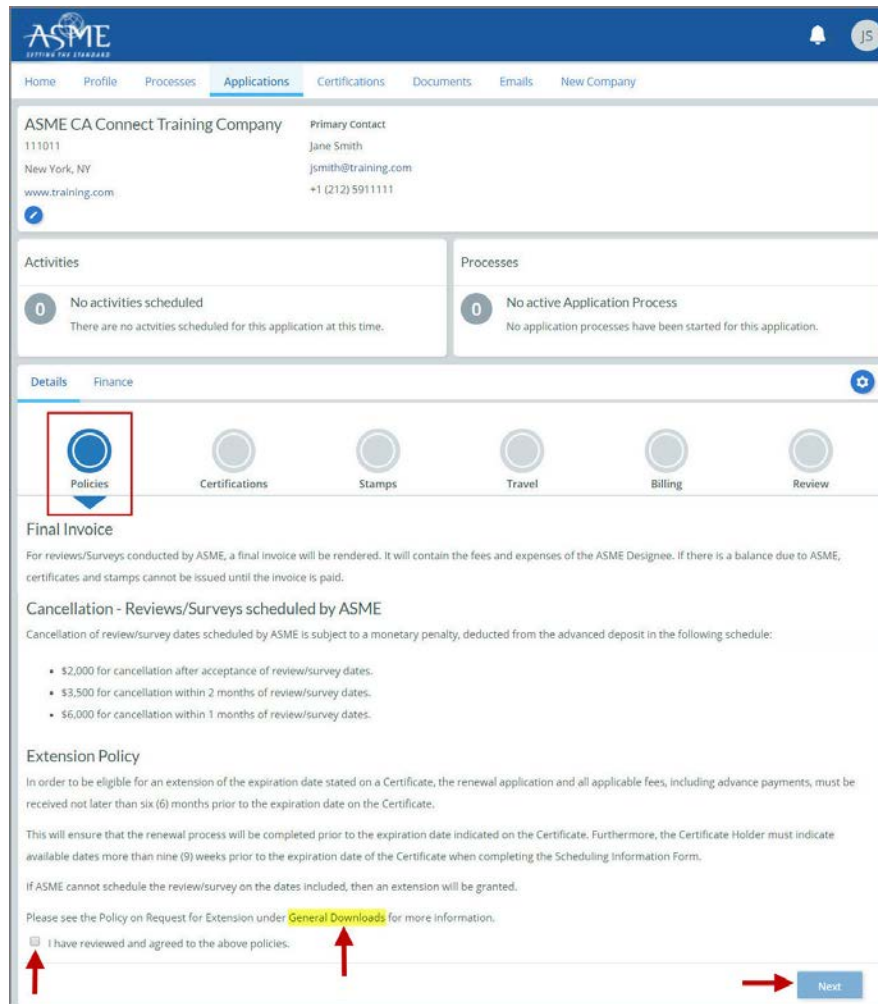


3. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.

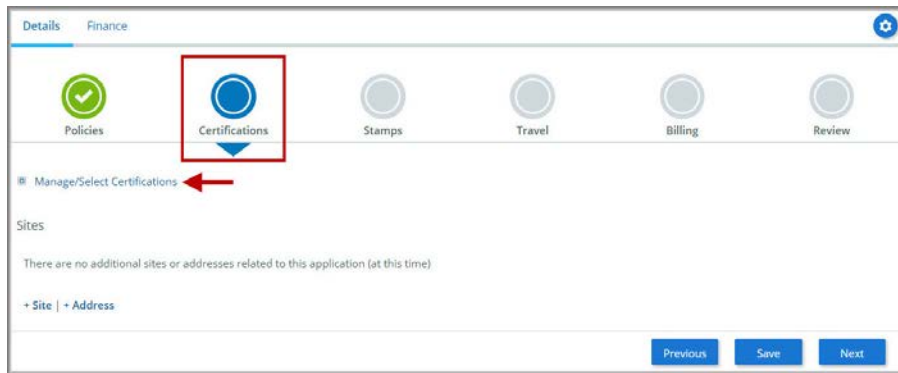


4. The first Application tab is the **Policies** tab. Review all information displayed on the tab.
5. Scroll down the page to the **Extension Policy** section.

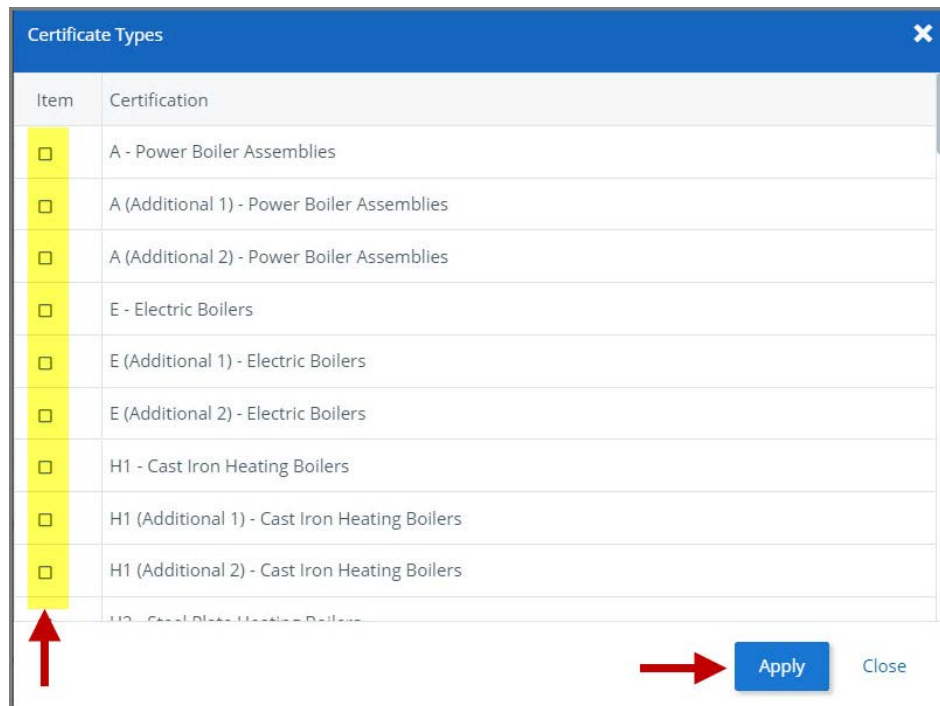
6. If you want to see the policy relating to a Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
7. Check **I have reviewed and agreed to the above policies** checkbox.



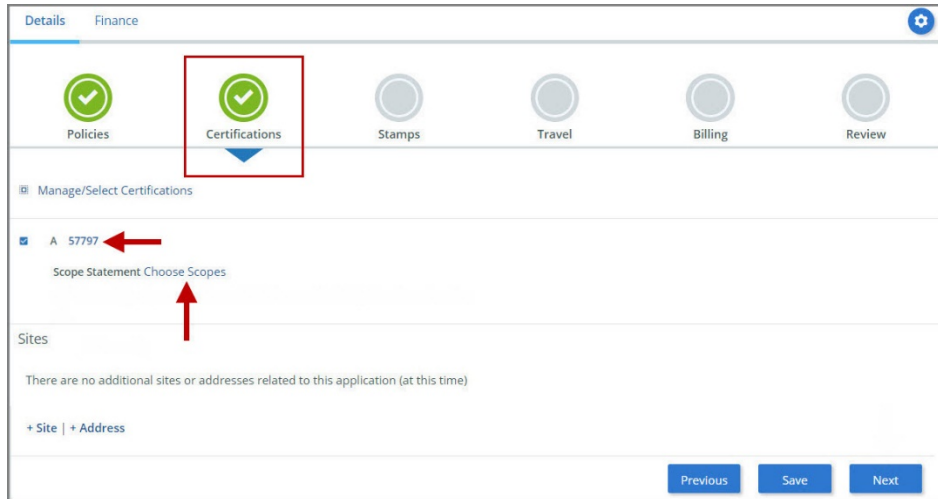
8. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications tab**.
9. Click the **Manage/Select Certifications** link or checkbox.



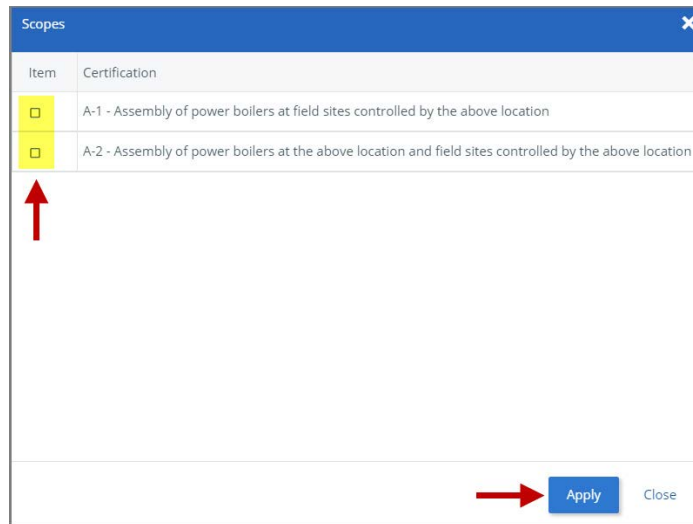
10. The Certificate Types form is displayed. Select the **Boiler** certificate type associated with the certificate you are renewing.
11. If you are applying for a **new certificate** as well, select the new certificate type.
12. When done, click **Apply** to continue.



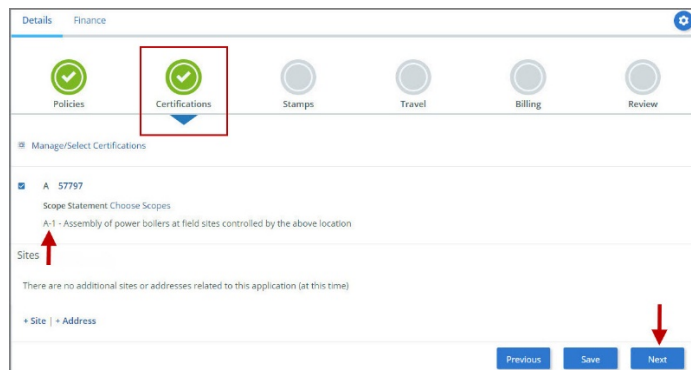
13. The **Boiler** Certificate Type(s) you selected will be added to the Certifications tab. Click the **Choose Scopes** link.



14. Relevant scopes will appear in the **Scopes** form. Select one or more scope statements applicable to the certificate type, then click **Apply** to continue.



15. The scope you selected will be added in the **Scope Statement** section of the **Certifications** tab. Repeat these steps for each certificate type(s) you are applying for.
16. When done, click **Next** to continue.



17. The **Certifications** tab is updated to reflect a green checkmark. The application data processing will advance to the **Stamps tab**.
18. Select an **Authorized Inspection Agency** from the list of AIA Organizations by clicking on the down arrow. Select the Authorized Inspection Agency.

19. The **Stamps** tab is updated to reflect a green checkmark. The application data processing will advance to the **Travel tab**.
20. The **Company Name** is displayed as a link under the Location Name label. Click on the link.

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Not Complete

21. The **Travel Recommendation Detail** form is presented.
22. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
23. You must enter the information for all required fields which are denoted with a red * asterisks.
24. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
25. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.

26. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. []

Save

27. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.

28. When done, click **Save** to continue.

Please review the addresses below.

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

[Save](#) [Cancel](#)

29. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
30. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
31. Confirm that the status for all locations is **Complete**, then click **Next** to continue.

Details Finance

Policies Certifications Stamps **Travel** Billing Review

Travel Recommendation

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Complete

[Add New Location](#)

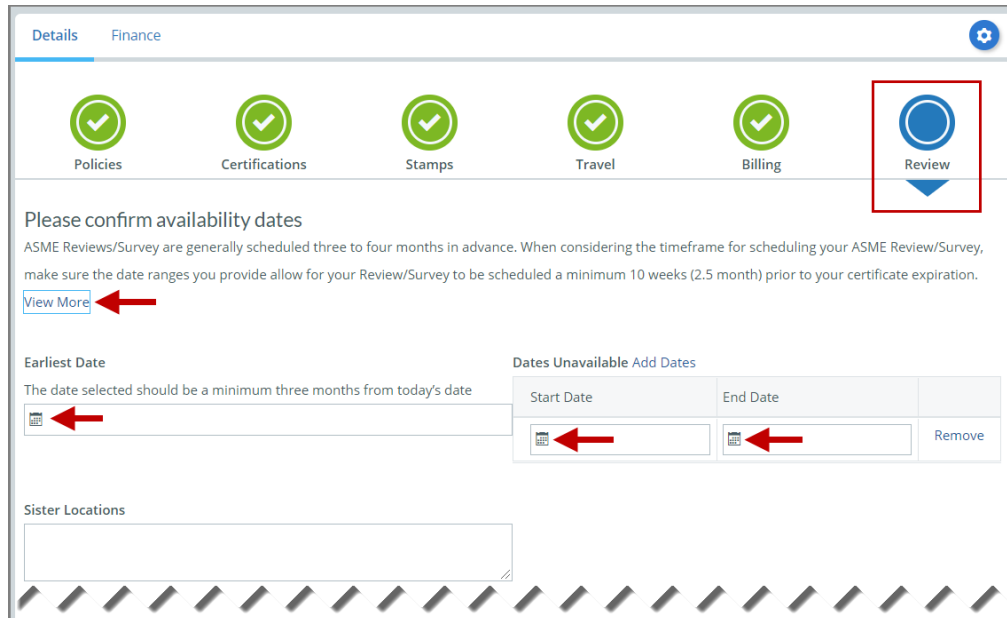
[Previous](#) [Next](#)

32. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
33. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
34. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.

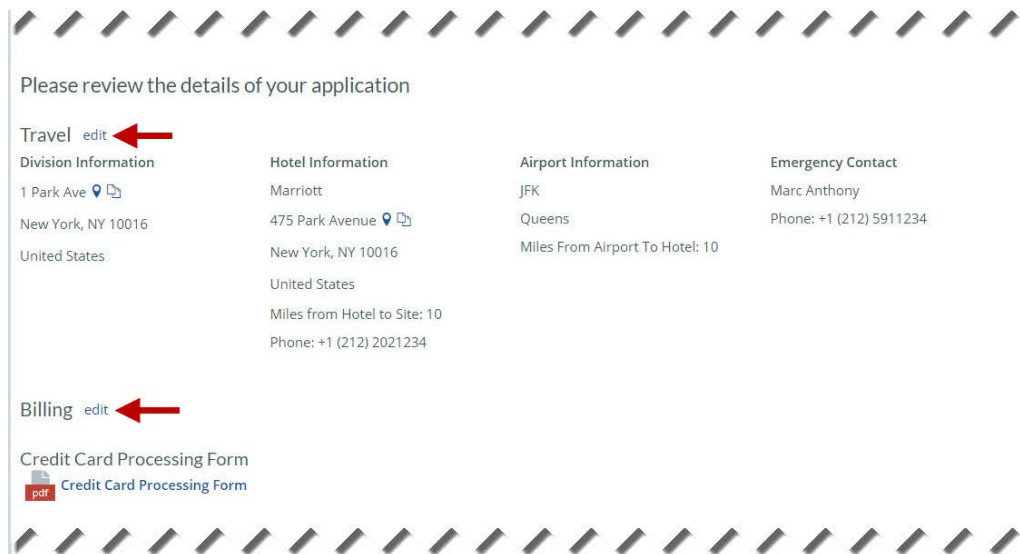
- b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
35. When done, click **Next** to continue.

The screenshot shows a web application interface with a top navigation bar containing tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The Billing tab is active and highlighted with a red box and a green checkmark. Below the tabs, the Billing section is titled "Billing" and includes a note: "A retainer is billed to cover cost associated with the review/survey. Any left over remittance will be refunded." The form is divided into two columns. The left column contains fields for Billing Address (Address Line 1, 2, 3, Country, City, Zip/Postal Code, Contact/Attention, Phone Number) and options for "Use Plant Address" and "Use Mailing Address". The right column contains fields for Company Banking Details (Company Banking Details, Bank Account Name / Beneficiary, ABA Routing Number, Billing Contact Email, Account Number / IBAN #, SWIFT Code / BIC, Bank Transit Number, Tax ID Number). A red arrow points to the "Company Banking Details" label. At the bottom of the form, there is a link for "Credit Card Processing Form" with a PDF icon, and a red arrow points to it. Below the form are three buttons: "Previous", "Save", and "Next", with a red arrow pointing to the "Next" button.

36. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
37. The **Review tab** displays a summary of the information that was entered in each of the tabs.
38. Click the **View More** link to display additional information on availability dates.
39. Enter the **Earliest Date** that your company will be available for the review. **Please note** the dates you enter must be a minimum of three months in the future.
40. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



41. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
42. Select the **Edit** links to modify any of the information you entered.
43. Click on the **Credit Card Processing Form** to download the form if needed.



44. Scroll down the tab and select the **Upload Company Manual** link. Locate the manual on your local computer and upload the file.
45. Select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.

46. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
47. Select the **Upload Agreement Form** link.
48. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
49. Click **Save** to continue.

The screenshot shows a web form with two columns of input fields. The left column is titled 'Banking Details' and includes fields for Bank Name, ABA Routing Number, Account Number/IBAN #, Swift Code, Bank Transit Number, Bank Account Name, Tax ID Number, Contact/Attention Name (with value 'Contxxx'), and Contact/Attention Email. The right column is titled 'Billing Address' and includes fields for address (with value '1 Park Ave'), city/state (with value 'New York, NY 10016'), and country (with value 'United States'). Below the form, there is a section with instructions: 'Please print, sign and upload the Agreement Form'. The instructions state: 'Instructions: Please click the "Print Agreement" button, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it. Scan the signed form and save it as a pdf file on your computer. Finally, upload the scanned document via the upload box located below the "Print Agreement" button. Please upload only your completed Print Agreement Form. No other forms should be submitted via this upload box.' Below the instructions are two links: 'Download Agreement Form' and 'Upload Agreement Form', both with red arrows pointing to them. At the bottom right of the form are two buttons: 'Previous' and 'Save', with a red arrow pointing to the 'Save' button.

Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

IMPORTANT: This is the only opportunity you will have to alter any of the information prior to submission of the application. After the application is submitted, in order to make any changes, you will need to submit a change request to ASME.

The screenshot shows a web form with three buttons at the bottom right: 'Previous', 'Save', and 'Submit'. A red arrow points to the 'Submit' button.

50. You will be redirected to the **Application Details** section of the Applications tab.

Note: If you applied for a renewal and new certificate, the status of the new certificate will be listed as Pending. Following certificate issuance, the new certificate will be assign the certificate number.

Certifications			
Certification Type	Status	Effective	Expires
E ←	Pending ←		
A - 57762	Active	07/03/2019	07/03/2023
A-1 - Assembly of power boilers at field sites controlled by the above location			

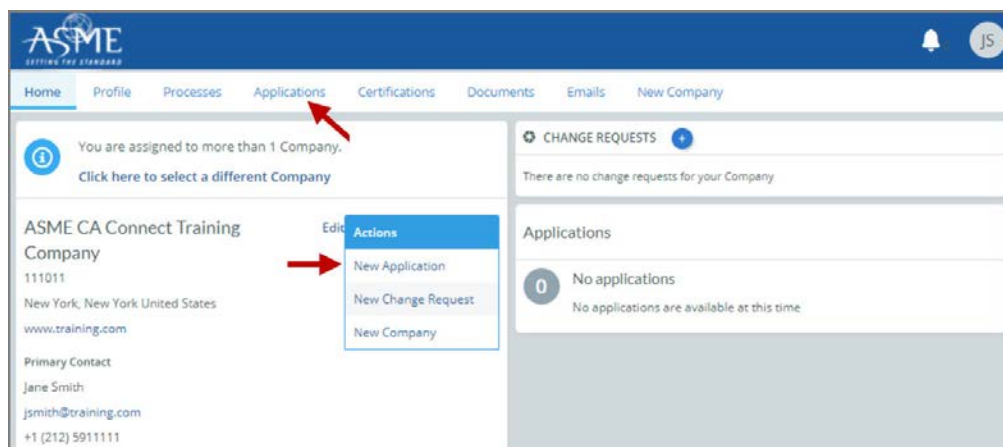
51. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.
52. Click the blue gear icon and select the **Print Document** link.



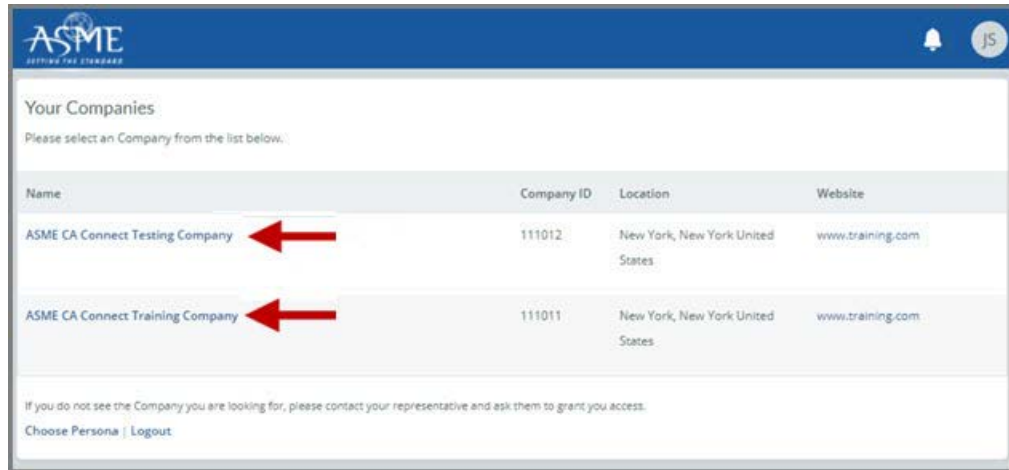
BPE Program - Renewal

The information required to process information and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile, Certifications, Stamps, Travel, Billing, and Review**. Each tab consists of specific application details and downloading/uploading that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

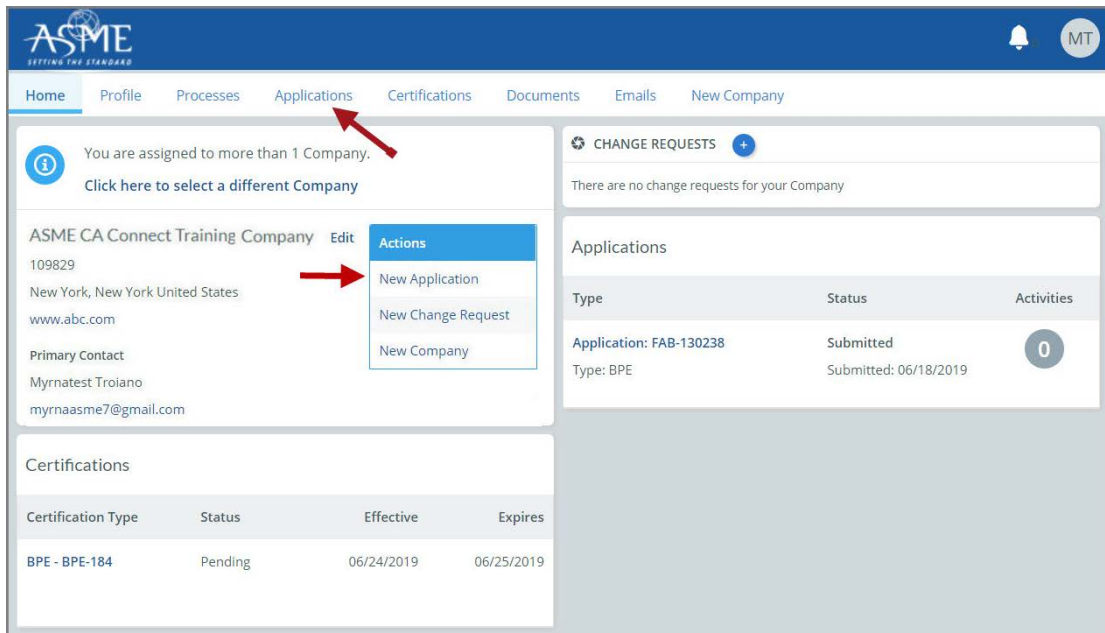
1. To begin the process of renewing your certification, you must be logged into CA Connect as the company's Primary Contact.
2. Once you log in,
 - a. If you are associated with a single company you will be directed to your Company Dashboard.



- b. If you are associated with multiple companies, you will first be directed to a list of your companies.
 - 1) Once you select the Company, you will be directed to the Company Dashboard.



3. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.



4. The **Applications** tab will opens so that you can begin to create a renewal application for certification you hold.
5. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.

Application	Type	Status	Created	Submitted
FAB-130237	AIA	Submitted	06/17/2019	06/17/2019

6. The first application tab is the **Policies tab**. Review all information displayed on the tab.
7. Scroll down the page to the **Extension Policy** section.
8. If you want to see the policy relating to a Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
9. Check **I have reviewed and agreed to the above policies** checkbox.
10. Click **Next** to continue.

ASME CA Connect Training Company

111011
New York, NY
www.training.com

Primary Contact
Jane Smith
jsmith@training.com
+1 (212) 5911111

Activities: 0 No activities scheduled. There are no activities scheduled for this application at this time.

Processes: 0 No active Application Process. No application processes have been started for this application.

Details Finance

Policies Certifications Stamps Travel Billing Review

Final Invoice
For reviews/Surveys conducted by ASME, a final invoice will be rendered. It will contain the fees and expenses of the ASME Designee. If there is a balance due to ASME, certificates and stamps cannot be issued until the invoice is paid.

Cancellation - Reviews/Surveys scheduled by ASME
Cancellation of review/survey dates scheduled by ASME is subject to a monetary penalty, deducted from the advanced deposit in the following schedule:

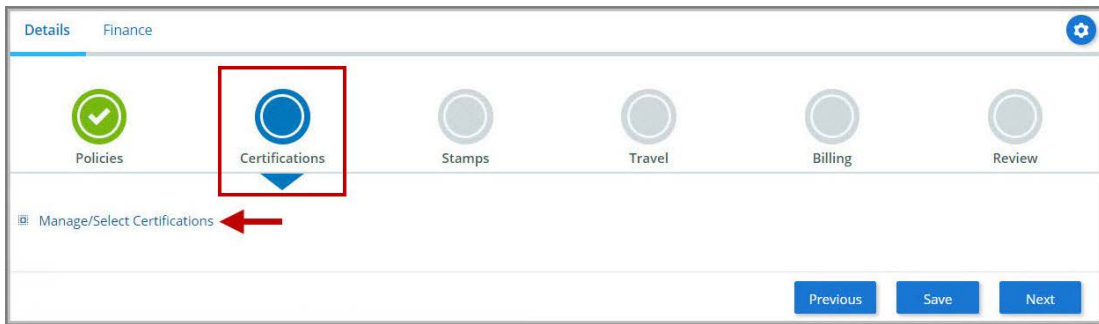
- \$2,000 for cancellation after acceptance of review/survey dates.
- \$3,500 for cancellation within 2 months of review/survey dates.
- \$6,000 for cancellation within 1 months of review/survey dates.

Extension Policy
In order to be eligible for an extension of the expiration date stated on a Certificate, the renewal application and all applicable fees, including advance payments, must be received not later than six (6) months prior to the expiration date on the Certificate.
This will ensure that the renewal process will be completed prior to the expiration date indicated on the Certificate. Furthermore, the Certificate Holder must indicate available dates more than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling Information Form.
If ASME cannot schedule the review/survey on the dates included, then an extension will be granted.
Please see the Policy on Request for Extension under **General Downloads** for more information.

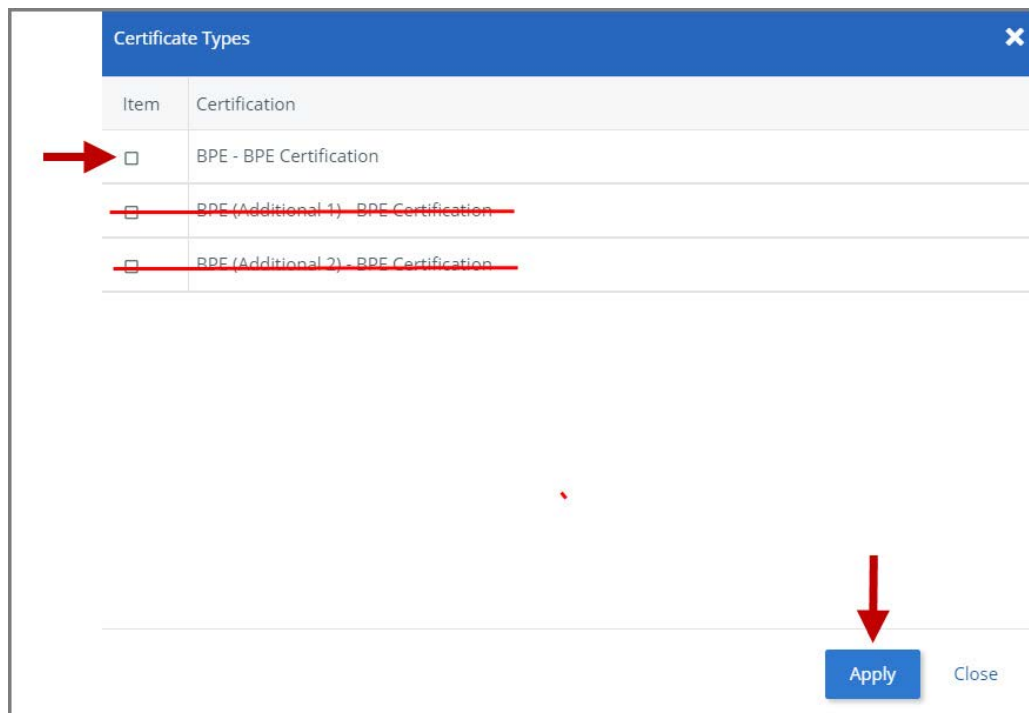
I have reviewed and agreed to the above policies.

Next

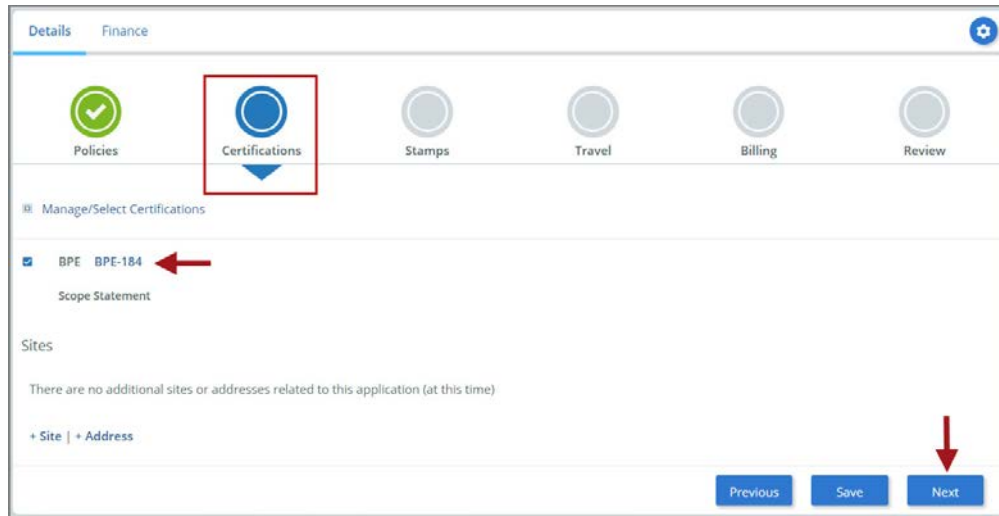
11. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications tab**.
12. Click the **Manage/Select Certifications** link or checkbox.



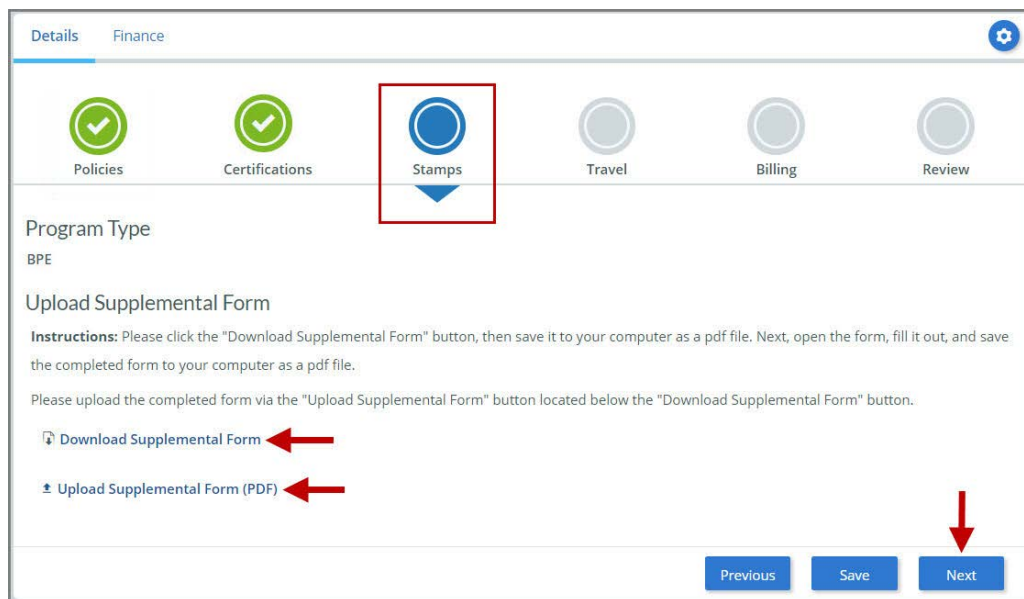
13. The Certificate Types is displayed. Select the BPE Certificate Type.
14. When done, click **Apply** to continue.



15. The BPE Certificate Type and Certificate Number that you are renewing will be added to the Certifications tab.
16. When done, click **Next** to continue.



17. The **Certifications** tab is updated to reflect a green checkmark. The application data processing will advance to the **Stamps** tab.
18. Click on the **Download Supplemental Form** link.
19. The **Supplemental Application Form** is downloaded to your local drive.
20. Complete the supplemental form.
21. Save the completed form on your local drive.
22. Click the **Upload Supplemental Form (PDF)** link.
23. Locate the completed supplemental form on your local drive and upload the form.
24. When done, click **Next** to continue.



25. The **Stamps** tab is updated to reflect a green checkmark. The application data processing will advance to the **Travel** tab.
26. The **Company Name** is displayed as a link under the Location Name label. Click on the link.

Details Finance

Policies Certifications Stamps **Travel** Billing Review

Travel Recommendation

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Not Complete

Previous Next

27. The **Travel Recommendation Detail** form is presented.
28. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
29. You must enter the information for all required fields which are denoted with a red * asterisks.
30. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
31. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
32. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. []

Save

33. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
34. When done, click **Save** to continue.

Please review the addresses below.

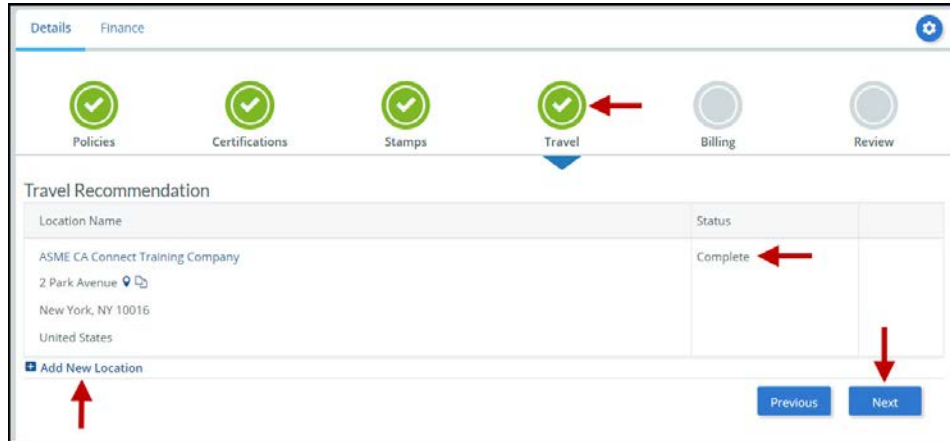
Hotel

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

Save Cancel

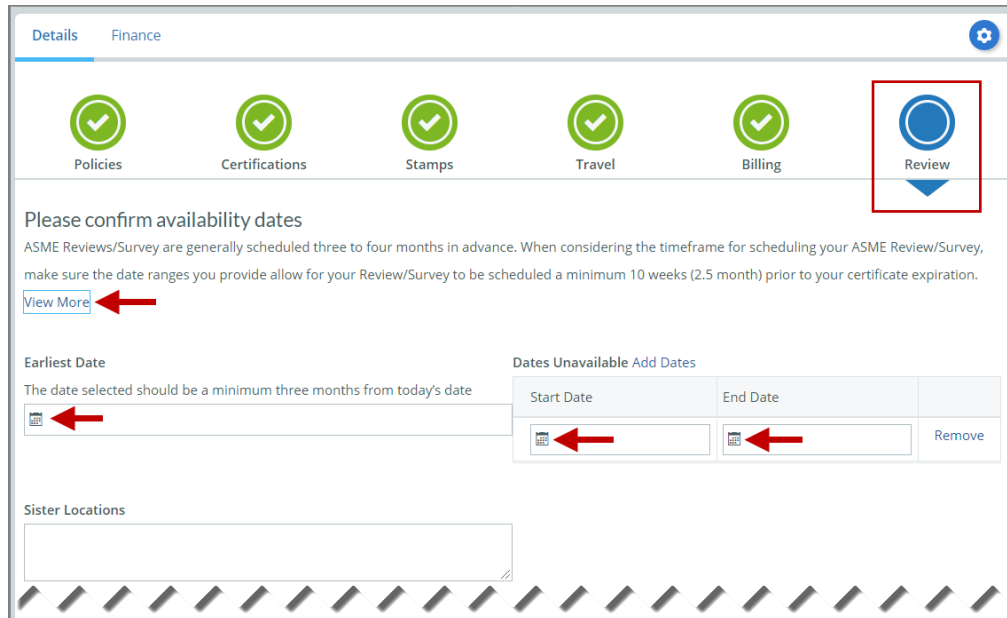
35. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
36. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
37. Confirm that the status for all locations is **Complete**, then click **Next** to continue.



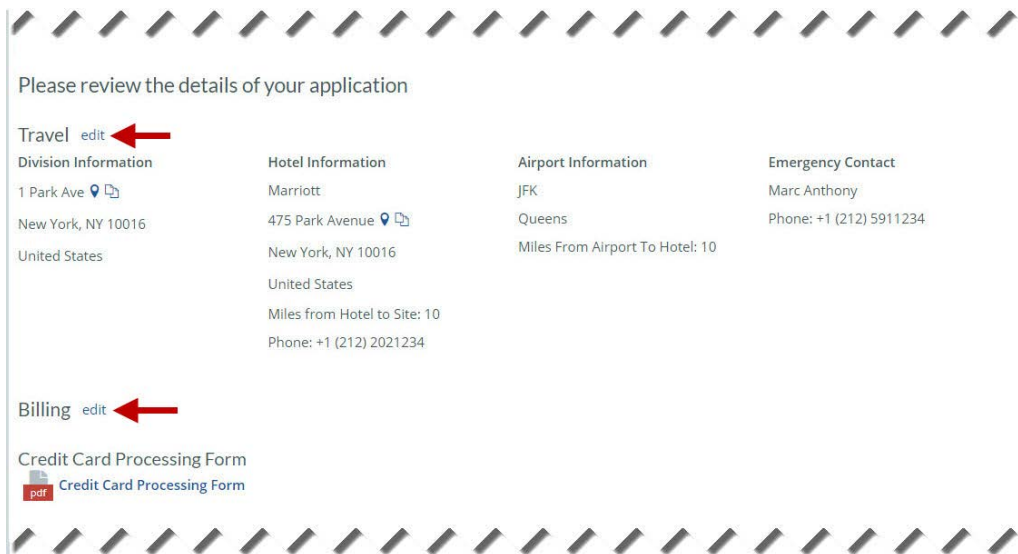
38. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
39. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
40. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
41. When done, click **Next** to continue.

The screenshot shows a software interface with a top navigation bar containing tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The Billing tab is active and highlighted with a red box and a green checkmark. Below the tabs, the Billing section is titled 'Billing' and includes a sub-header 'Billing Address' with options for 'Use Plant Address' and 'Use Mailing Address'. The form contains several input fields: Address Line 1, 2, and 3; Country (a dropdown menu); City; Zip/Postal Code; Contact/Attention; and Phone Number (with separate fields for country code and extension). On the right side, there are fields for 'Company Banking Details', 'Bank Account Name / Beneficiary', 'ABA Routing Number', 'Billing Contact Email', 'Account Number / IBAN #', 'SWIFT Code / BIC', and 'Bank Transit Number'. At the bottom right, there is a 'Tax ID Number' field. A link for 'Credit Card Processing Form' is visible with a PDF icon. At the bottom of the form, there are three buttons: 'Previous', 'Save', and 'Next'. Red arrows point to the 'Company Banking Details' header, the 'Credit Card Processing Form' link, and the 'Next' button.

42. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
43. The **Review tab** displays a summary of the information that was entered in each of the tabs.
44. Click the **View More** link to display additional information on availability dates.
45. Enter the **Earliest Date** that your company will be available for the review. Please note the dates you enter must be a minimum of three months in the future.
46. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



47. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
48. Select the **Edit** links to modify any of the information you entered.
49. Click on the **Credit Card Processing Form** to download the form if needed.



50. Scroll down the tab and select the **Upload Company Manual** link. Locate the manual on your local computer and upload the file.
51. Select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.
52. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.

53. Select the **Upload Agreement Form** link.
54. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
55. Click **Save** to continue.

The screenshot shows a web form with two columns of fields. The left column is titled 'Banking Details' and includes fields for Bank Name, ABA Routing Number, Account Number/IBAN #, Swift Code, Bank Transit Number, Bank Account Name, Tax ID Number, Contact/Attention Name, and Contact/Attention Email. The right column is titled 'Billing Address' and includes fields for address (1 Park Ave), city/state (New York, NY 10016), and country (United States). Below the fields, there are two instruction sections. The first section asks the user to upload their company manual, with a red arrow pointing to the 'Upload Company Manual' button. The second section asks the user to print, sign, and upload the Agreement Form, with red arrows pointing to the 'Download Agreement Form' and 'Upload Agreement Form' buttons. At the bottom right of the form, there are 'Previous' and 'Save' buttons, with a red arrow pointing to the 'Save' button.

Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

IMPORTANT: This is the only opportunity you will have to alter any of the information prior to submission of the application. After the application is submitted, in order to make any changes, you will need to submit a change request to ASME.

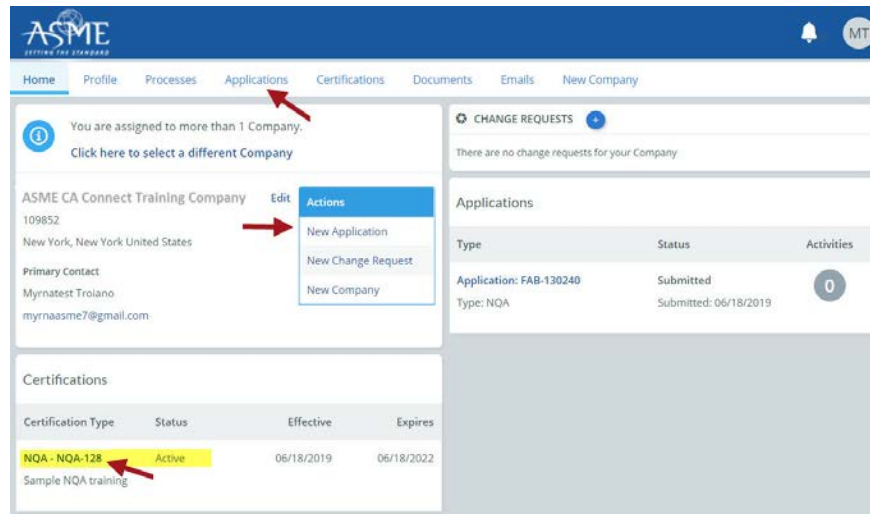
The screenshot shows a horizontal bar at the bottom of the page containing three buttons: 'Previous', 'Save', and 'Submit'. A red arrow points down to the 'Submit' button.

56. You will be redirected to the **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.
57. Click the blue gear icon and select the **Print Document** link.

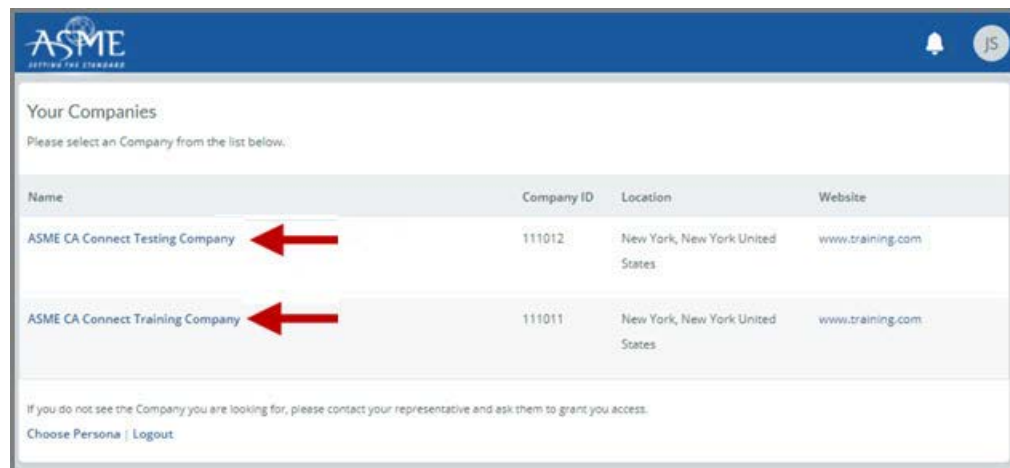
NQA Program – Renewal and New Application

The information required to process information and submit an application for certification/accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile, Certifications, Stamps, Travel, Billing, and Review**. Each tab consists of specific application details and downloading/uploading that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

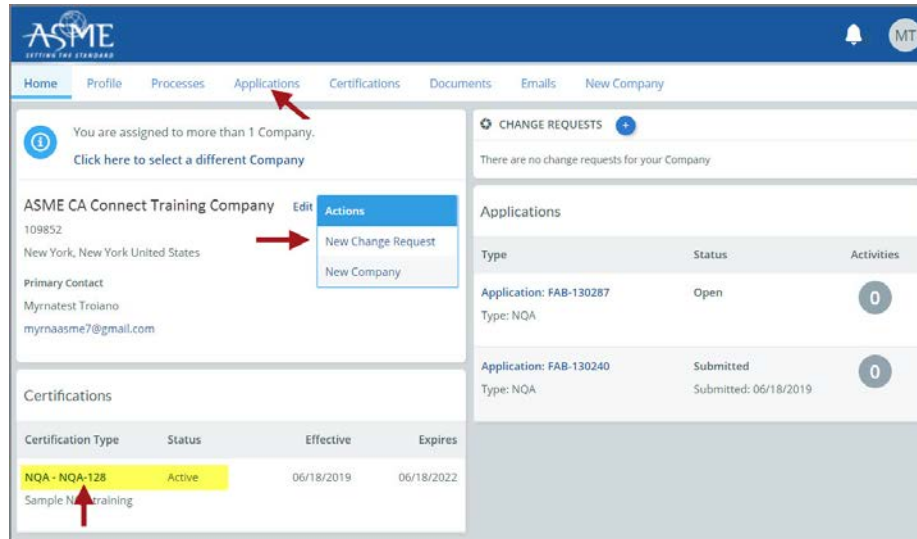
1. To begin the process of renewing your certification, you must be logged into CA Connect as the company's Primary Contact.
2. Once you log in,
 - a. If you are associated with a single company you will be directed to your Company Dashboard.



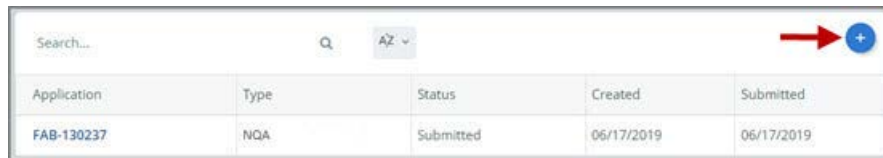
- b. If you are associated with multiple companies, you will first be directed to a list of your companies.
 - 1) Once you select the Company, you will be directed to the Company Dashboard.



3. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.



4. The **Applications** tab will open so that you can begin to create a renewal application for the certification you hold.
5. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.



6. The first application tab is the **Policies tab**. Review all information displayed on the tab.
7. Scroll down the page to the **Extension Policy** section.
8. If you want to see the policy relating to a Request for Extension, select the **General Downloadable Resources** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
9. Check **I have reviewed and agreed to the above policies** checkbox.

ASME CA Connect Training Company
 111011
 New York, NY
 www.training.com

Primary Contact
 Jane Smith
 jsmith@training.com
 +1 (212) 5911111

Activities: 0 No activities scheduled
 There are no activities scheduled for this application at this time.

Processes: 0 No active Application Process
 No application processes have been started for this application.

Details Finance

Policies Certifications Stamps Travel Billing Review

Final Invoice
 For reviews/Surveys conducted by ASME, a final invoice will be rendered. It will contain the fees and expenses of the ASME Designee. If there is a balance due to ASME, certificates and stamps cannot be issued until the invoice is paid.

Cancellation - Reviews/Surveys scheduled by ASME
 Cancellation of review/survey dates scheduled by ASME is subject to a monetary penalty, deducted from the advanced deposit in the following schedule:

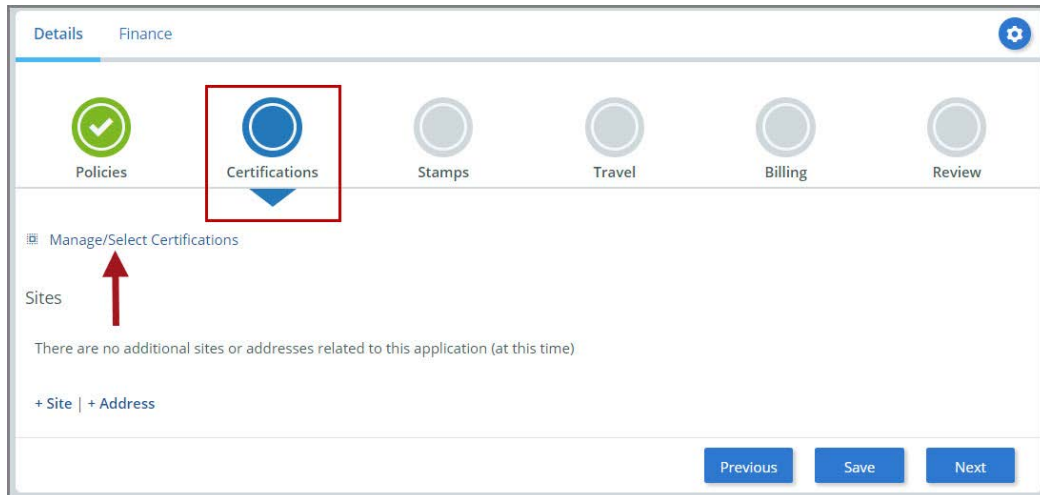
- \$2,000 for cancellation after acceptance of review/survey dates.
- \$3,500 for cancellation within 2 months of review/survey dates.
- \$6,000 for cancellation within 1 months of review/survey dates.

Extension Policy
 In order to be eligible for an extension of the expiration date stated on a Certificate, the renewal application and all applicable fees, including advance payments, must be received not later than six (6) months prior to the expiration date on the Certificate.
 This will ensure that the renewal process will be completed prior to the expiration date indicated on the Certificate. Furthermore, the Certificate Holder must indicate available dates more than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling Information Form.
 If ASME cannot schedule the review/survey on the dates included, then an extension will be granted.
 Please see the Policy on Request for Extension under [General Downloads](#) for more information.

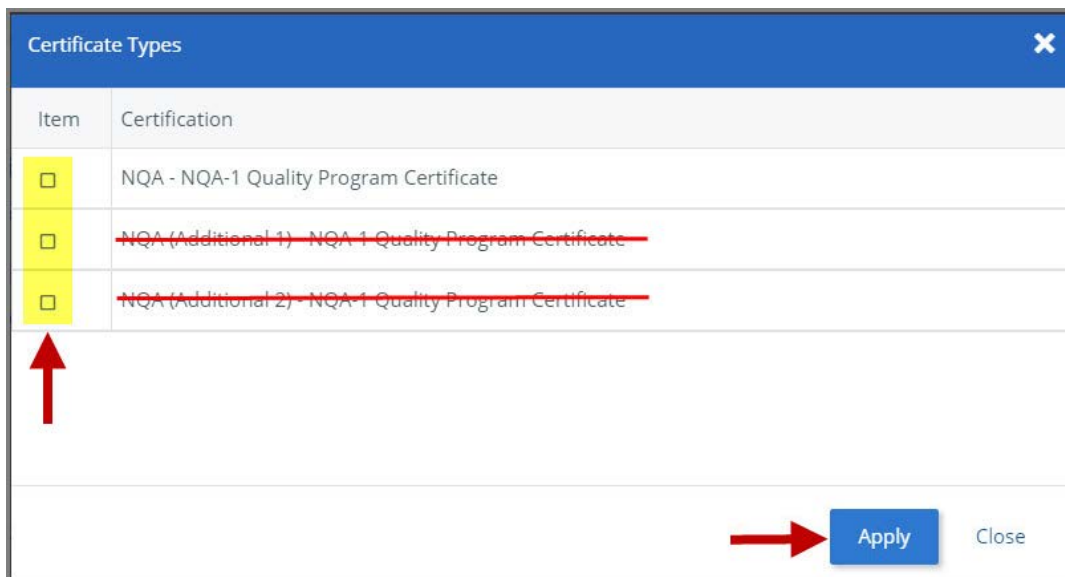
I have reviewed and agreed to the above policies.

Next

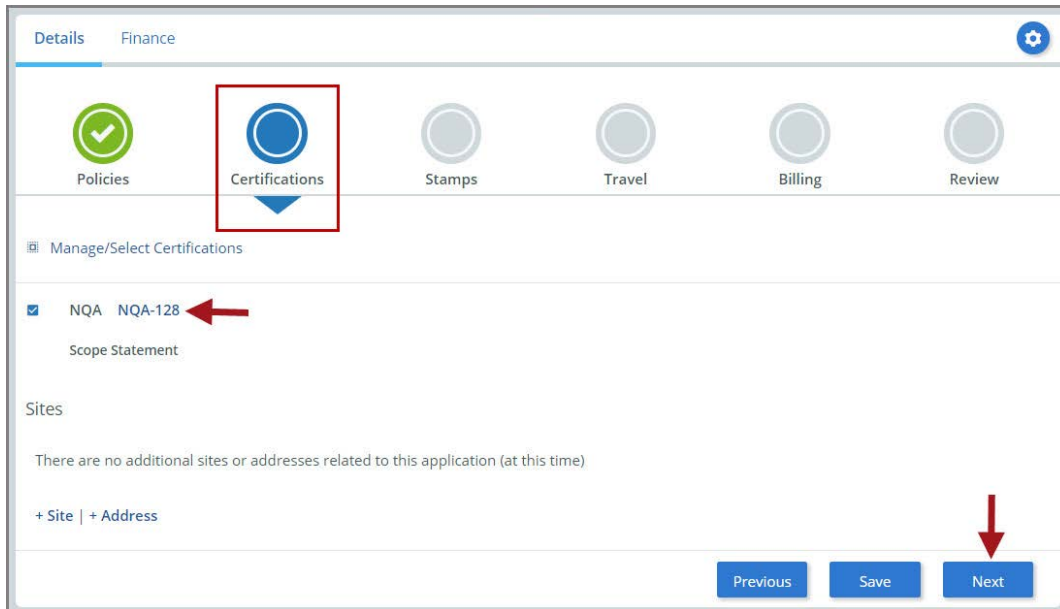
10. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications tab**.
11. Click the **Manage/Select Certifications** link or checkbox.



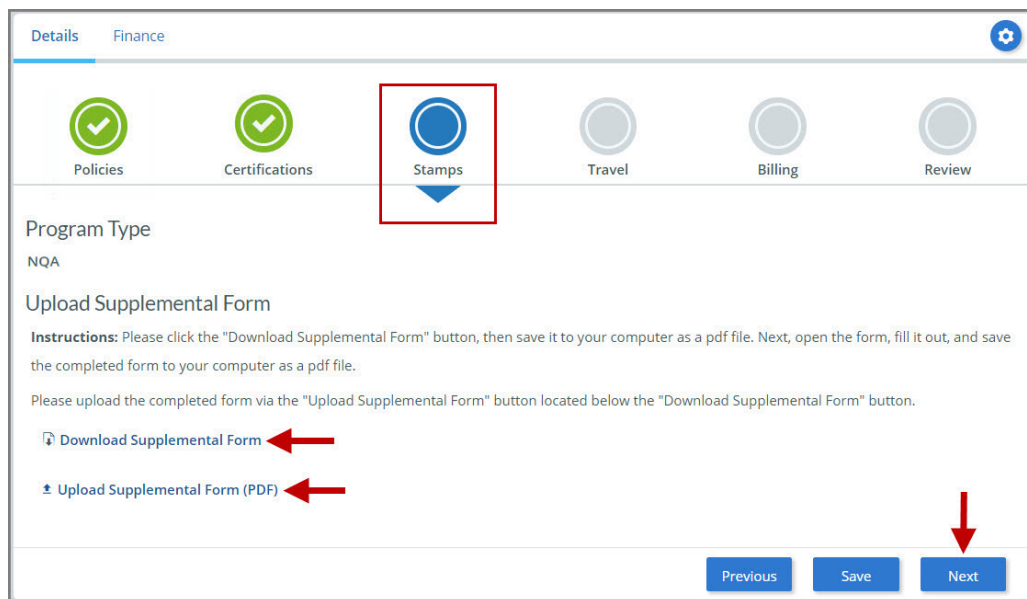
12. The Certificate Types form is displayed. Select the NQA Certificate Type.
13. When done, click **Apply** to continue.



14. The NQA Certificate Type and Certificate Number that you are renewing will be added to the Certifications tab.
15. When done, click **Next** to continue.

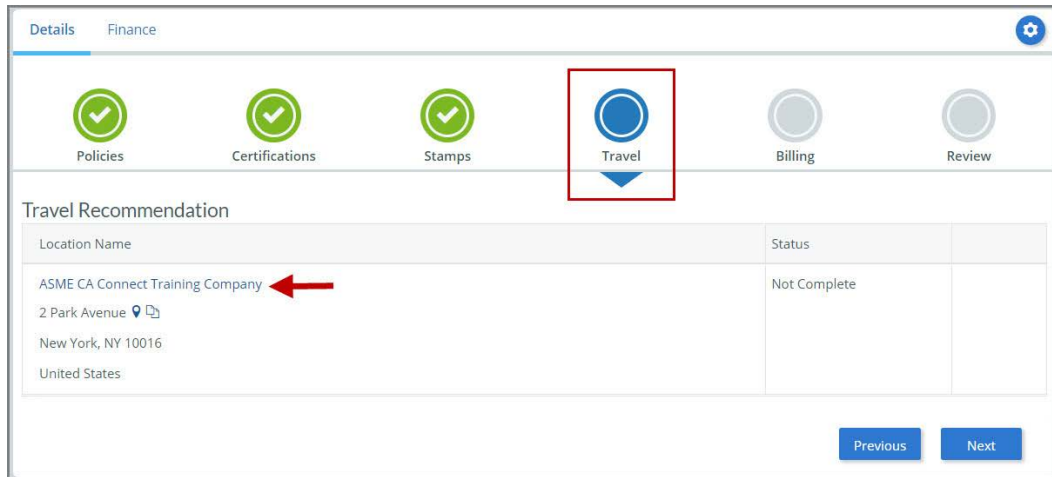


16. The **Certifications** tab is updated to reflect a green checkmark. The application data processing will advance to the **Stamps** tab.
17. Click on the **Download Supplemental Form** link.
18. The **Supplemental Application Form** is downloaded to your local drive.
19. Complete the supplemental form.
20. Save the completed form on your local drive.
21. Click the **Upload Supplemental Form (PDF)** link.
22. Locate the completed supplemental form on your local drive and upload the form.
23. When done, click **Next** to continue.



24. The **Stamps** tab is updated to reflect a green checkmark. The application process will advance to the **Travel** tab.

25. The **Company Name** is displayed as a link under the Location Name label. Click on the link.



The screenshot shows a web application interface with a top navigation bar containing 'Details' and 'Finance' tabs. Below the navigation bar is a row of six circular icons representing different sections: Policies, Certifications, Stamps, Travel, Billing, and Review. The 'Travel' icon is highlighted with a red square. Below this row is a 'Travel Recommendation' section containing a table with two columns: 'Location Name' and 'Status'. The table has one row with the following data:

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Not Complete

A red arrow points to the company name 'ASME CA Connect Training Company' in the table. At the bottom right of the table, there are two buttons labeled 'Previous' and 'Next'.

26. The **Travel Recommendation Detail** form is presented.
27. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
- Note:** The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
28. You must enter the information for all required fields which are denoted with a red * asterisks.
29. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
30. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
31. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Save

32. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
33. When done, click **Save** to continue.

Please review the addresses below.

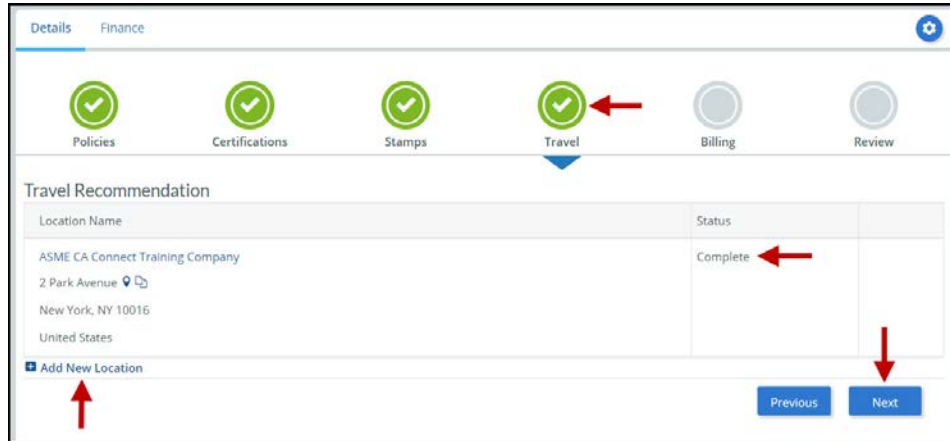
Hotel

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

Save Cancel

34. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
35. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
36. Confirm that the status for all locations is **Complete**, then click **Next** to continue.



37. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
38. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
39. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
40. When done, click **Next** to continue.

Details Finance

Policies Certifications Stamps Travel **Billing** Review

Billing
A retainer is billed to cover cost associated with the review/survey. Any left over remittance will be refunded.

Billing Address
Use Plant Address Use Mailing Address

Address Line 1
Address Line 1

Address Line 2
Address Line 2

Address Line 3
Address Line 3

Country
Select Country

City

Zip/Postal Code

Contact/Attention

Phone Number
+ ext.

Company Banking Details
Please provide the following information to allow ASME to refund any left over remittance.

Company Banking Details

Bank Account Name / Beneficiary

ABA Routing Number

Billing Contact Email

Account Number / IBAN #

SWIFT Code / BIC

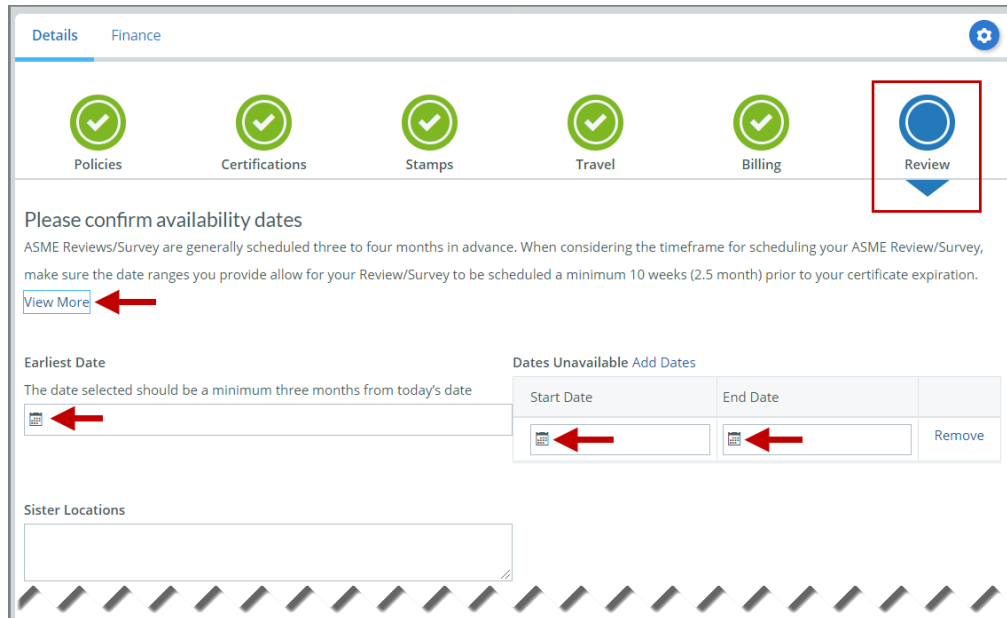
Bank Transit Number

Tax ID Number

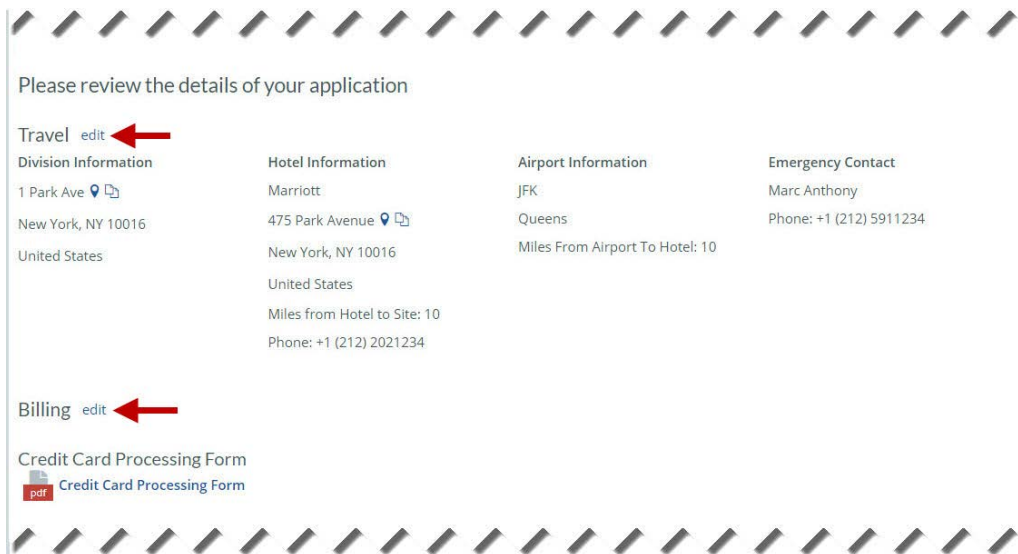
Credit Card Processing Form
Credit Card Processing Form

Previous Save **Next**

41. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
42. The **Review tab** displays a summary of the information that was entered in each of the tabs.
43. Click the **View More** link to display additional information on availability dates.
44. Enter the **Earliest Date** that your company will be available for the review. Please note the dates you enter must be a minimum of three months in the future.
45. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



46. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
47. Select the **Edit** links to modify any of the information you entered.
48. Click on the **Credit Card Processing Form** to download the form if needed.



49. Scroll down the tab and select the **Upload Company Manual** link. Locate the manual on your local computer and upload the file.
50. Select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.

51. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
52. Select the **Upload Agreement Form** link.
53. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
54. Click **Save** to continue.

The screenshot shows a web form with two columns of fields. The left column is titled 'Banking Details' and includes fields for Bank Name, ABA Routing Number, Account Number/IBAN #, Swift Code, Bank Transit Number, Bank Account Name, Tax ID Number, Contact/Attention Name (Contxxx), and Contact/Attention Email. The right column is titled 'Billing Address' and includes fields for 1 Park Ave, New York, NY 10016, and United States.

Below the fields, there are two main sections with instructions:

- Please upload your company manual**
 Instructions: Upload your company manual via the upload box below.
 Please upload only your Company Manual. No other forms should be submitted via this upload box.
 A red arrow points to the 'Upload Company Manual' button.
- Please print, sign and upload the Agreement Form**
 Instructions: Please click the "Print Agreement" button, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it. Scan the signed form and save it as a pdf file on your computer. Finally, upload the scanned document via the upload box located below the "Print Agreement" button.
 Please upload only your completed Print Agreement Form. No other forms should be submitted via this upload box.
 Red arrows point to the 'Download Agreement Form' and 'Upload Agreement Form' buttons.

At the bottom right of the form, there are two buttons: 'Previous' and 'Save'. A red arrow points to the 'Save' button.

Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

IMPORTANT: This is the only opportunity you will have to alter any of the information prior to submission of the application. After the application is submitted, in order to make any changes, you will need to submit a change request to ASME.

This screenshot shows the bottom right corner of a web form. It features three buttons: 'Previous', 'Save', and 'Submit'. A red arrow points to the 'Submit' button.

55. You will be redirected to the **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.

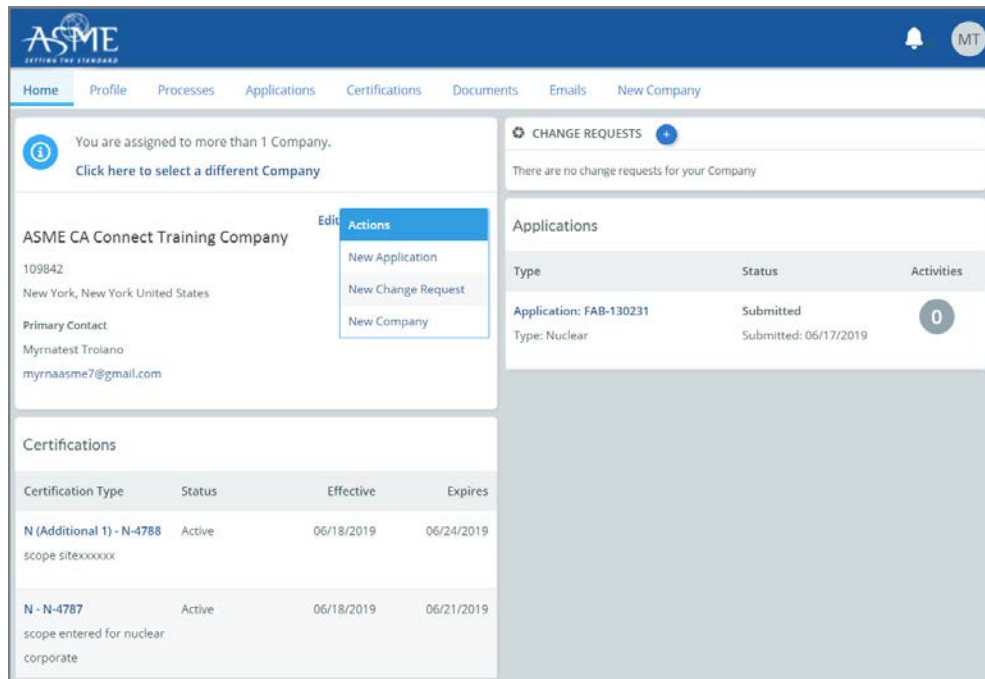
56. Click the blue gear icon and select the **Print Document** link.



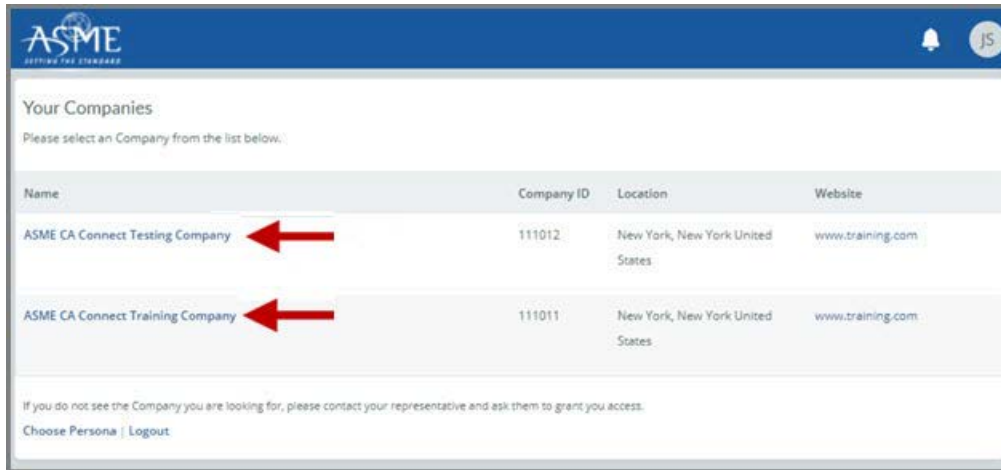
Nuclear Program – Renewal and New Application

The information required to process information and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile, Certifications, Stamps, Travel, Billing, and Review**. Each tab consists of specific application details and downloading/uploading that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

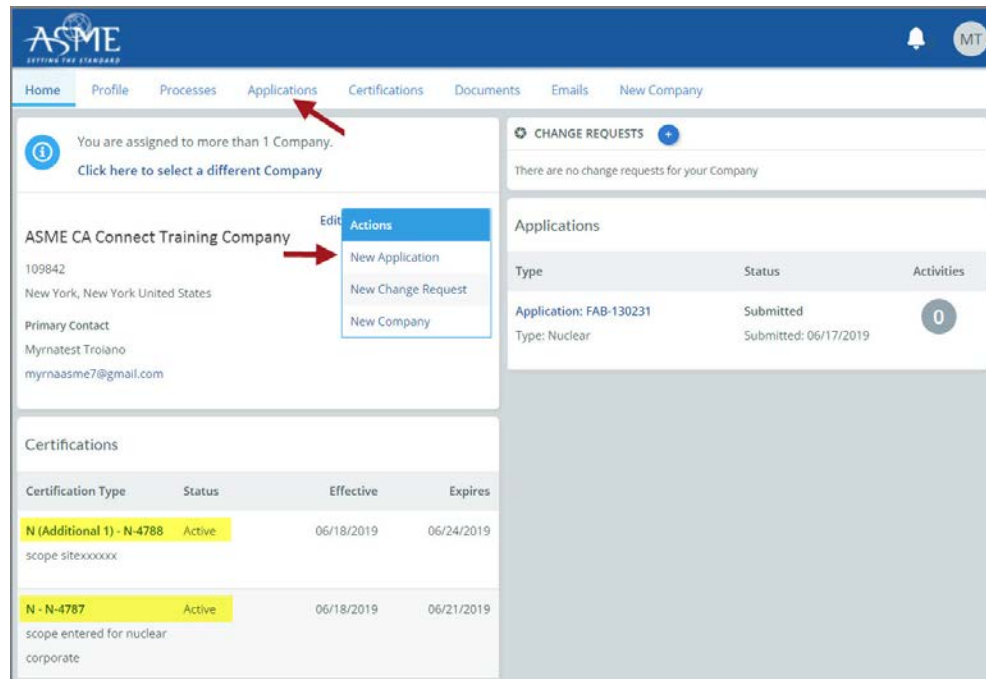
1. To begin the process of renewing your certification, you must be logged into CA Connect as the company's Primary Contact.
2. Once you log in,
 - a. If you are associated with a single company you will be directed to your Company Dashboard.



- b. If you are associated with multiple companies, you will first be directed to a list of your companies.
 - 1) Once you select the Company, you will be directed to the Company Dashboard.



3. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.



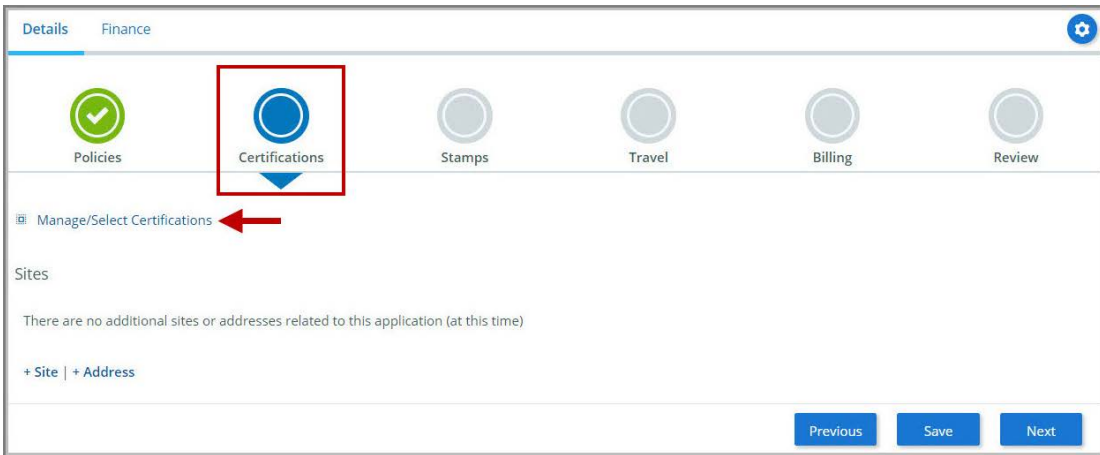
4. The Applications tab will open so that you can begin create a new application for the renewal certification process.
5. The default and first Application tab is the **Policies** tab. Review all information displayed on the tab.
6. Scroll down the page to the **Extension Policy** section.
7. If you want to see the policy on Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
8. Check the **I have reviewed and agreed to the above policies** box.

9. Click **Next** to continue.

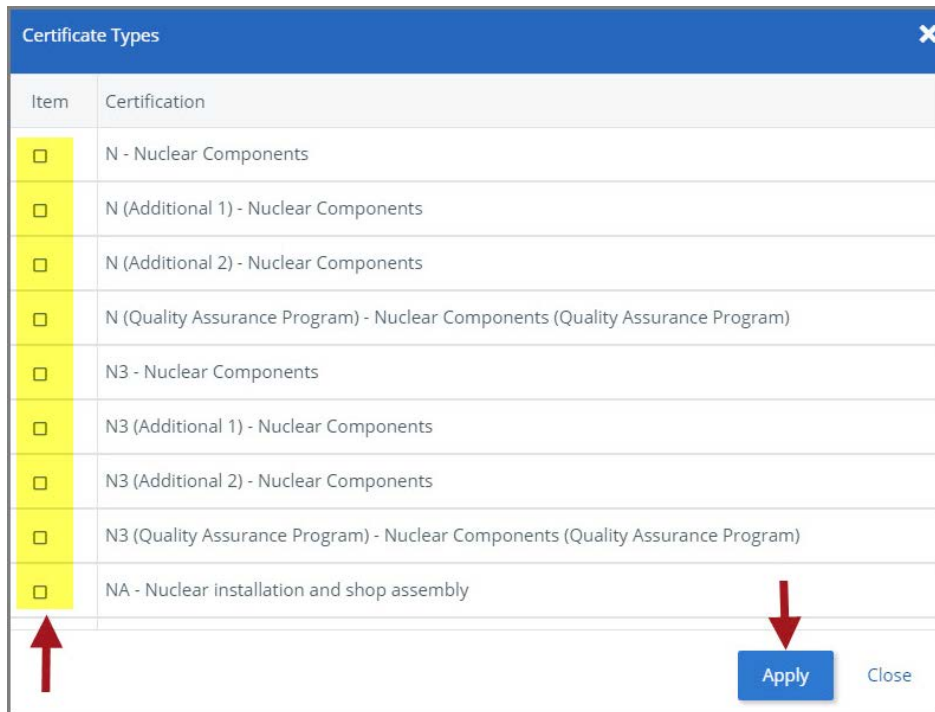
The screenshot shows the ASME CA Connect Training Company application page. The page is divided into several sections:

- Header:** ASME logo and navigation tabs: Home, Profile, Processes, Applications (selected), Certifications, Documents, Emails, New Company.
- Company Information:** ASME CA Connect Training Company, 111011, New York, NY, www.training.com. Primary Contact: Jane Smith, jsmith@training.com, +1 (212) 5911111.
- Activities:** 0 No activities scheduled. There are no activities scheduled for this application at this time.
- Processes:** 0 No active Application Process. No application processes have been started for this application.
- Navigation:** Details (selected), Finance. A gear icon is visible in the top right of this section.
- Policy Tabs:** Policies (highlighted with a red box and a green checkmark), Certifications, Stamps, Travel, Billing, Review.
- Final Invoice:** For reviews/Surveys conducted by ASME, a final invoice will be rendered. It will contain the fees and expenses of the ASME Designee. If there is a balance due to ASME, certificates and stamps cannot be issued until the invoice is paid.
- Cancellation - Reviews/Surveys scheduled by ASME:** Cancellation of review/survey dates scheduled by ASME is subject to a monetary penalty, deducted from the advanced deposit in the following schedule:
 - \$2,000 for cancellation after acceptance of review/survey dates.
 - \$3,500 for cancellation within 2 months of review/survey dates.
 - \$6,000 for cancellation within 1 months of review/survey dates.
- Extension Policy:** In order to be eligible for an extension of the expiration date stated on a Certificate, the renewal application and all applicable fees, including advance payments, must be received not later than six (6) months prior to the expiration date on the Certificate. This will ensure that the renewal process will be completed prior to the expiration date indicated on the Certificate. Furthermore, the Certificate Holder must indicate available dates more than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling Information Form. If ASME cannot schedule the review/survey on the dates included, then an extension will be granted. Please see the Policy on Request for Extension under **General Downloads** for more information.
- Agreement:** I have reviewed and agreed to the above policies. (A red arrow points to the checkbox.)
- Next Button:** A blue button labeled "Next" with a red arrow pointing to it.

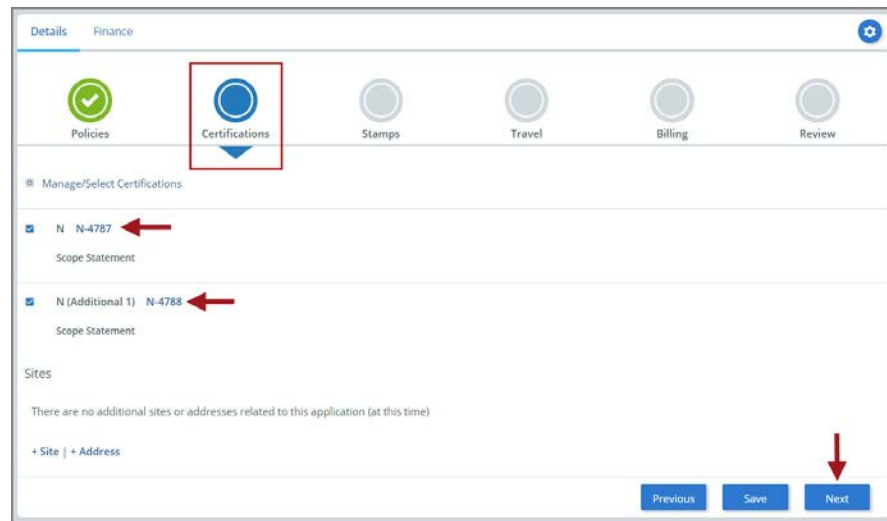
10. The **Policies** tab is updated to reflect a green checkmark.
11. Your application process will advance to the **Certifications** tab.
12. Click the **Manage/Select Certifications** link or checkbox.



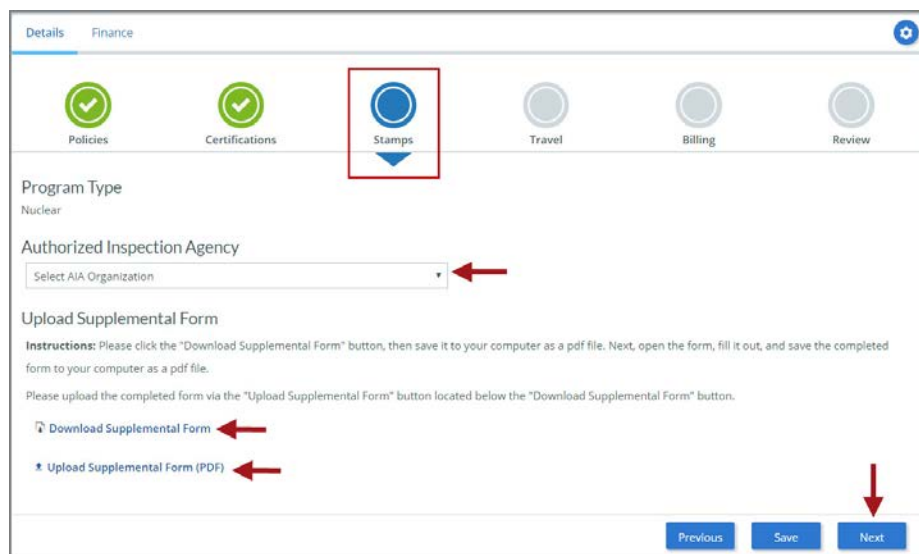
13. The Certificate Types form is displayed containing a list of Nuclear Certificate Types. Select the Certificate Type for the certificate(s) you are renewing.
14. When done, click **Apply** to continue.



15. The Certificate Type and Certificate Number you are renewing will be added to the Certifications Tab.



16. The **Certifications** tab is updated to reflect a green checkmark.
17. Your application process will advance to the **Stamps** tab.
18. Select an **Authorized Inspection Agency** from the list of AIA Organizations by clicking on the down arrow then select the organization.
19. Click on the **Download Supplemental Form** link.
20. The **Supplemental Application Form** is downloaded to your local drive.
21. Complete the supplemental form.
22. Save the completed form on your local drive.
23. Click the **Upload Supplemental Form (PDF)** link.
24. Locate the completed supplemental form on your local drive and upload the form.
25. When done, click **Next** to continue.



26. The **Stamps** tab is updated to reflect a green checkmark. The application process will advance to the **Travel** tab.

27. The **Company Name** is displayed as a link under the Location Name label. Click on the link.

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Not Complete

28. The **Travel Recommendation Detail** form is presented.
29. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
- Note:** The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
30. You must enter the information for all required fields which are denoted with a red * asterisks.
31. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
32. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
33. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. []

Save

34. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
35. When done, click **Save** to continue.

Please review the addresses below.

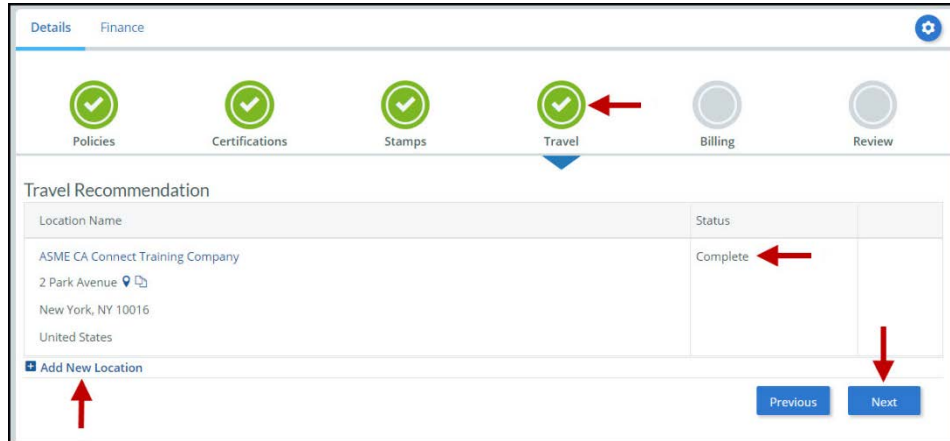
Hotel

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

Save Cancel

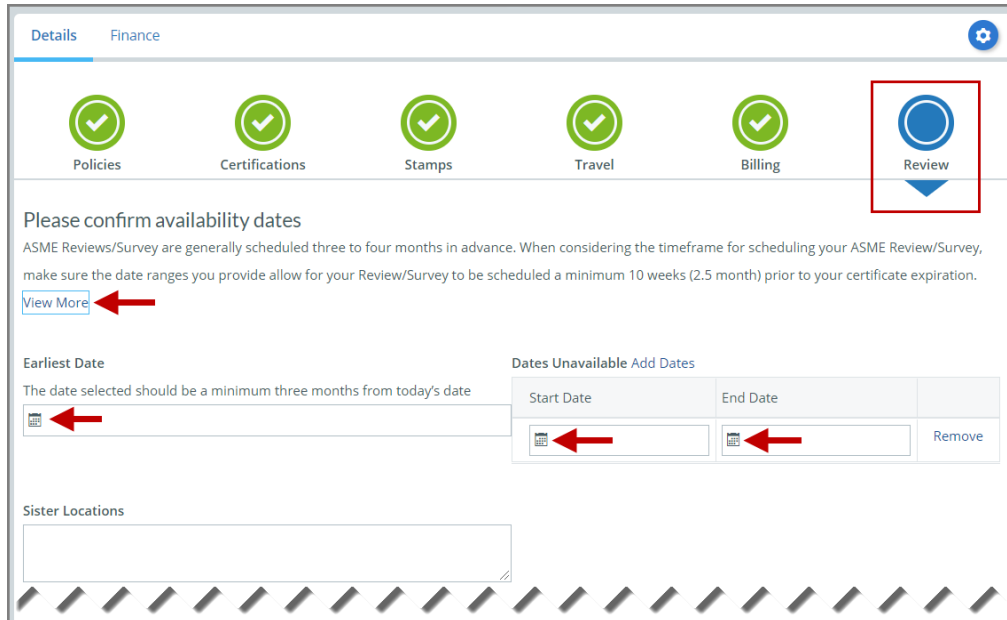
36. You will be redirected back to the Travel Tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
37. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
38. Confirm that the status for all locations is **Complete**, then click **Next** to continue.



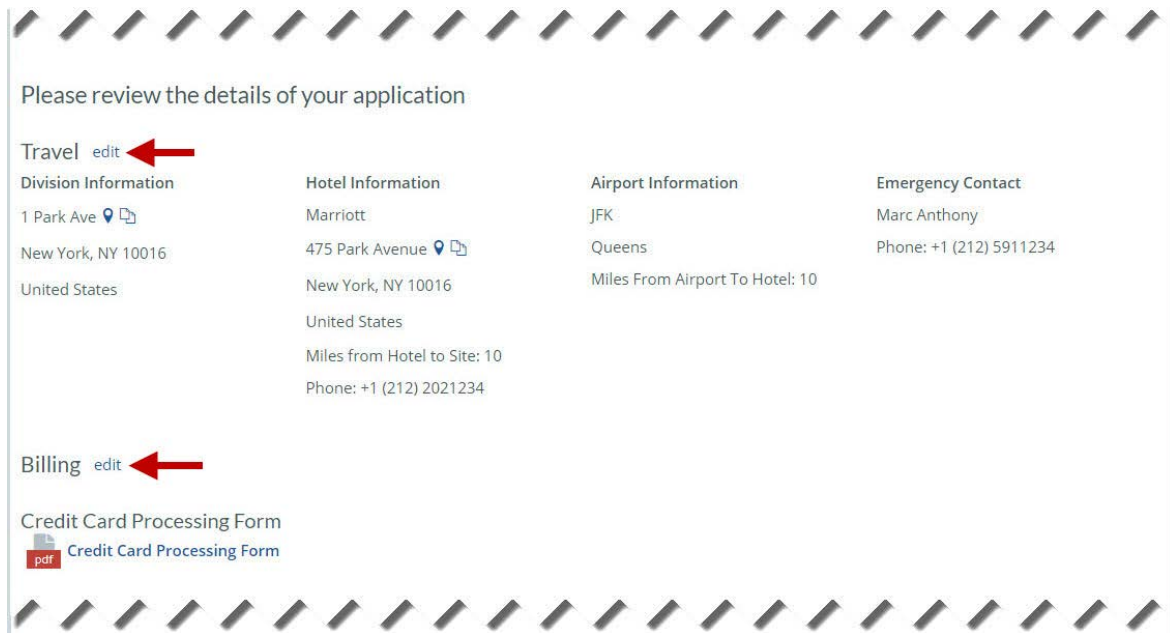
39. The **Travel** tab is updated to reflect a green checkmark.
40. Your application process will advance to the **Billing** tab.
41. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
42. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
43. When done, click **Next** to continue.

The screenshot shows a web application interface with a top navigation bar containing tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The Billing tab is active, indicated by a blue checkmark and a red box. Below the tabs, the Billing section is titled 'Billing' and includes a sub-header 'Billing Address' with options for 'Use Plant Address' and 'Use Mailing Address'. The form contains several input fields: Address Line 1, 2, and 3; Country (a dropdown menu); City; Zip/Postal Code; Contact/Attention; and Phone Number (with separate fields for country code and extension). On the right side, there are fields for Company Banking Details, Bank Account Name / Beneficiary, ABA Routing Number, Billing Contact Email, Account Number / IBAN #, SWIFT Code / BIC, Bank Transit Number, and Tax ID Number. At the bottom right, there is a 'Credit Card Processing Form' link with a PDF icon, and three buttons: 'Previous', 'Save', and 'Next'. Red arrows point to the 'Company Banking Details' header, the 'Credit Card Processing Form' link, and the 'Next' button.

44. The **Billing** tab is updated to reflect a green checkmark. Your application process will advance to the **Review tab**.
45. The **Review tab** displays a summary of the information that was entered in each of the tabs.
46. Click the **View More** link to display additional information on availability dates.
47. Enter the **Earliest Date** that your company will be available for the review. Please note that dates you enter must be a minimum of three months in the future.
48. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note that dates you enter must be a minimum of three months in the future.



49. Prior to submitting the renewal application, confirm the information appearing on the Review tab is accurate and that all tabs are green with a checkmark. If they are not, you can return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
50. You can click the **Edit** links to modify any of the information you entered. This is the only opportunity you will have to alter any of the information prior to submission of the renewal application.
51. You can also download the **Credit Card Processing Form**.



52. Scroll down the tab and select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.
53. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
54. Select the **Upload Agreement Form** link.
55. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
56. Click **Save** to continue.

Banking Details

Bank Name:

ABA Routing Number:

Account Number/IBAN #:

Swift Code:

Bank Transit Number:

Bank Account Name:

Tax ID Number:

Contact/Attention Name: Contxxx

Contact/Attention Email:

Billing Address

1 Park Ave

New York, NY 10016

United States

Please print, sign and upload the Agreement Form

Instructions: Please click the "Print Agreement" button, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it. Scan the signed form and save it as a pdf file on your computer. Finally, upload the scanned document via the upload box located below the "Print Agreement" button.

Please upload only your completed Print Agreement Form. No other forms should be submitted via this upload box.

Download Agreement Form

Upload Agreement Form

Previous Save

57. Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

Previous Save Submit

58. You will be redirected to an **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application. Click the blue gear icon and select the **Print Document** link.
59. To print the application details, click the **Print Document** option.

Details Finance

Application Details

Application ID: FAB-130263

Print Document

PRD Program – Renewal and New Observer Application

The information required to process information and submit an application for certification/accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile, Certifications, Stamps, Travel, Billing, and Review**. Each tab consists of specific application details and downloading/uploading that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

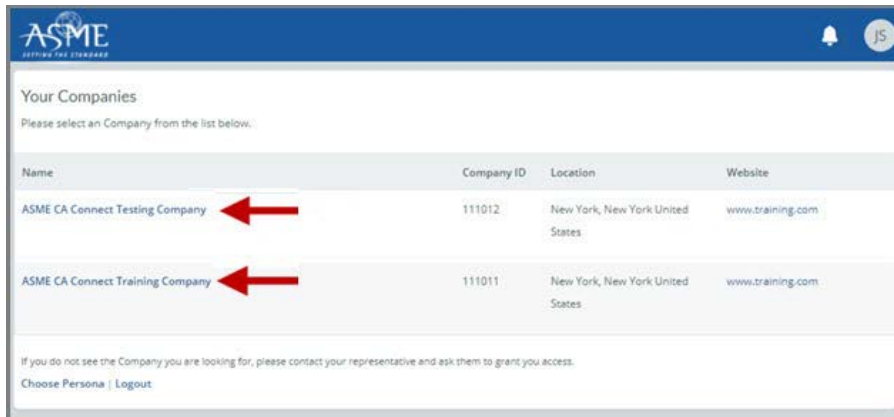
1. To begin the process of renewing your certification, you must be logged into CA Connect as the company's Primary Contact.
2. Once you log in,
 - a. If you are associated with a single company you will be directed to your Company Dashboard.

The screenshot displays the ASME CA Connect user interface. The top navigation bar includes 'Home', 'Profile', 'Processes', 'Applications', 'Certifications', 'Documents', 'Emails', and 'New Company'. The main content area is divided into several sections:

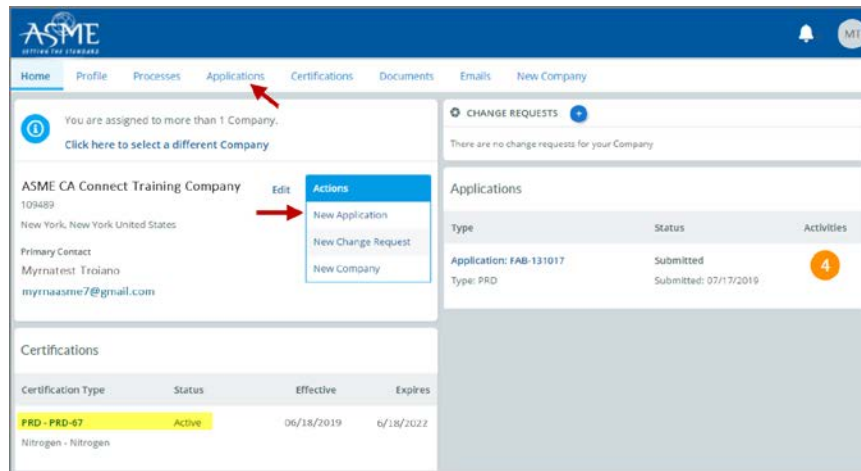
- Company Information:** A message states 'You are assigned to more than 1 Company. Click here to select a different Company'. Below this, the company details for 'ASME CA Connect Training Company' are shown, including ID 109842, location (New York, New York, United States), and primary contact Myrnatel Trolano (myrnaasme7@gmail.com). An 'Actions' menu is open, showing options for 'New Application', 'New Change Request', and 'New Company'.
- CHANGE REQUESTS:** A section indicating 'There are no change requests for your Company'.
- Applications:** A table with columns for Type, Status, and Activities. One application is listed: 'Application: FAB-130231' with status 'Submitted' and a date of 'Submitted: 06/17/2019'. The 'Activities' column shows a count of 0.
- Certifications:** A table with columns for Certification Type, Status, Effective, and Expires. Two certifications are listed:

Certification Type	Status	Effective	Expires
N (Additional 1) - N-4788 scope sitexxxxxx	Active	06/18/2019	06/24/2019
N - N-4787 scope entered for nuclear corporate	Active	06/18/2019	06/21/2019

- b. If you are associated with multiple companies, you will first be directed to a list of your companies.
 - 1) Once you select the Company, you will be directed to the Company Dashboard.



3. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.



4. The Applications tab will open so that you can begin create a new application for the renewal certification process.
5. The default and first Application tab is the **Policies** tab. Review all information displayed on the tab.
6. Scroll down the page to the **Extension Policy** section.
7. If you want to see the policy on Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org Downloadable Resources** page.
 - b. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
8. Check the **I have reviewed and agreed to the above policies** box.
9. Click **Next** to continue.

ASME CA Connect Training Company

111011
New York, NY
www.training.com

Primary Contact
Jane Smith
jsmith@training.com
+1 (212) 5911111

Activities
0 No activities scheduled
There are no activities scheduled for this application at this time.

Processes
0 No active Application Process
No application processes have been started for this application.

Details Finance

Policies Certifications Stamps Travel Billing Review

Final Invoice
For reviews/Surveys conducted by ASME, a final invoice will be rendered. It will contain the fees and expenses of the ASME Designee. If there is a balance due to ASME, certificates and stamps cannot be issued until the invoice is paid.

Cancellation - Reviews/Surveys scheduled by ASME
Cancellation of review/survey dates scheduled by ASME is subject to a monetary penalty, deducted from the advanced deposit in the following schedule:

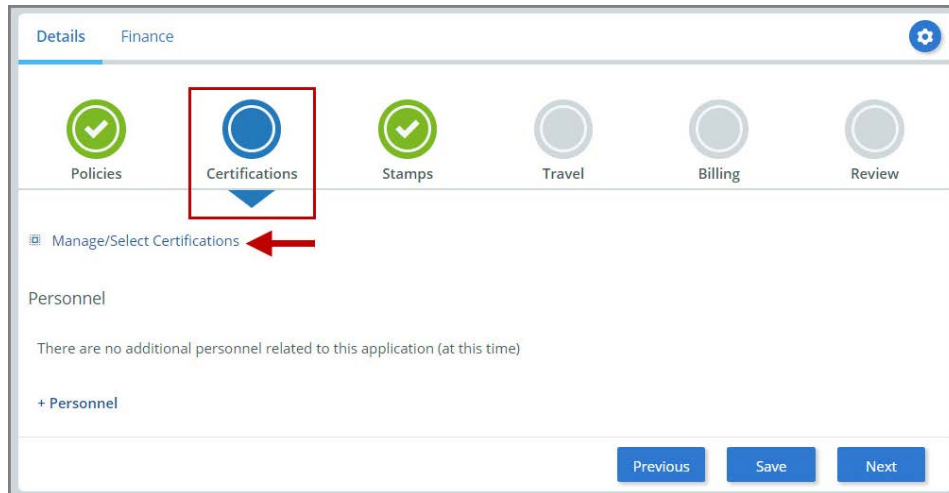
- \$2,000 for cancellation after acceptance of review/survey dates.
- \$3,500 for cancellation within 2 months of review/survey dates.
- \$6,000 for cancellation within 1 months of review/survey dates.

Extension Policy
In order to be eligible for an extension of the expiration date stated on a Certificate, the renewal application and all applicable fees, including advance payments, must be received not later than six (6) months prior to the expiration date on the Certificate.
This will ensure that the renewal process will be completed prior to the expiration date indicated on the Certificate. Furthermore, the Certificate Holder must indicate available dates more than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling Information Form.
If ASME cannot schedule the review/survey on the dates included, then an extension will be granted.
Please see the Policy on Request for Extension under **General Downloads** for more information.

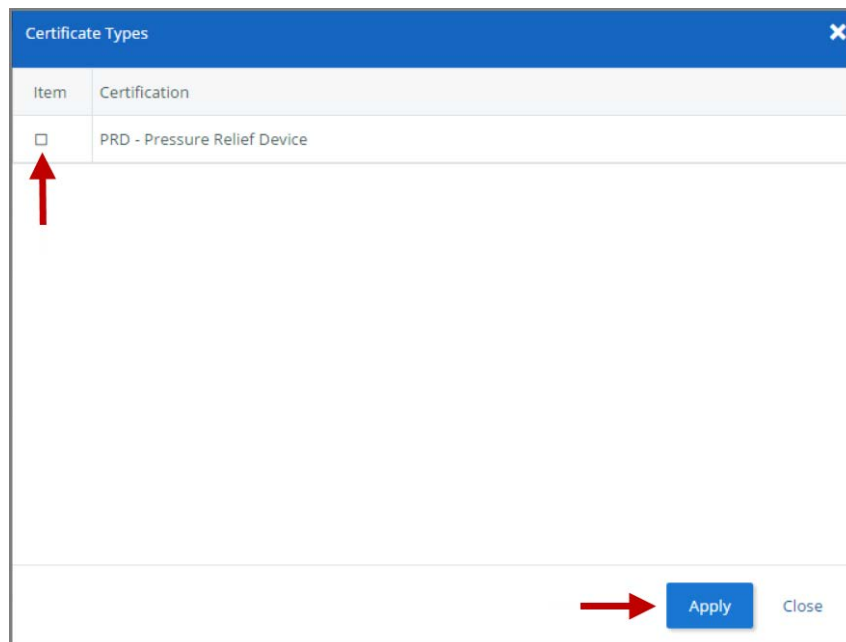
I have reviewed and agreed to the above policies.

Next

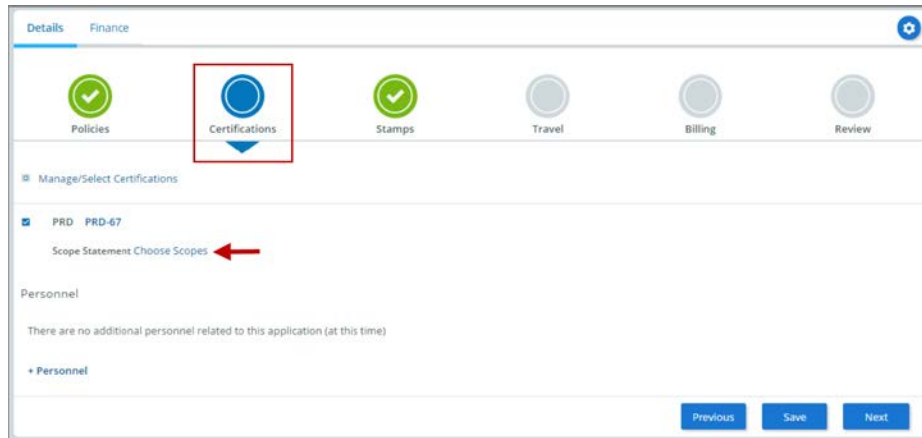
10. The **Policies** tab is updated to reflect a green checkmark.
11. Your application process will advance to the **Certifications** tab.
12. Click the **Manage/Select Certifications** link or checkbox.



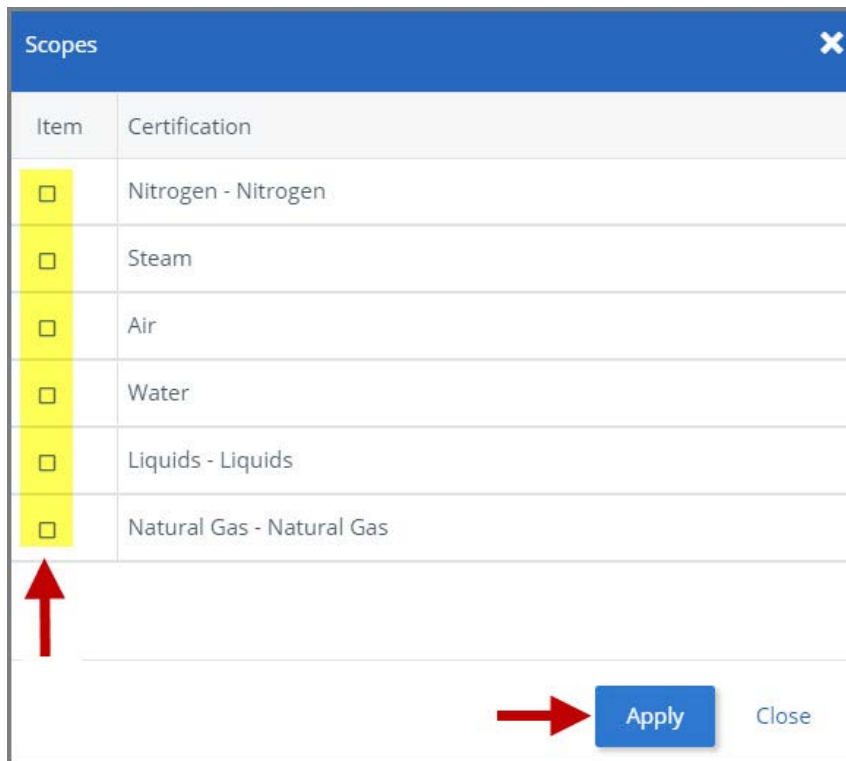
13. The Certificate Types form is displayed containing the PRD-Pressure Relief Device Certificate Type. Select the Certificate Type.
14. When done, click **Apply** to continue.



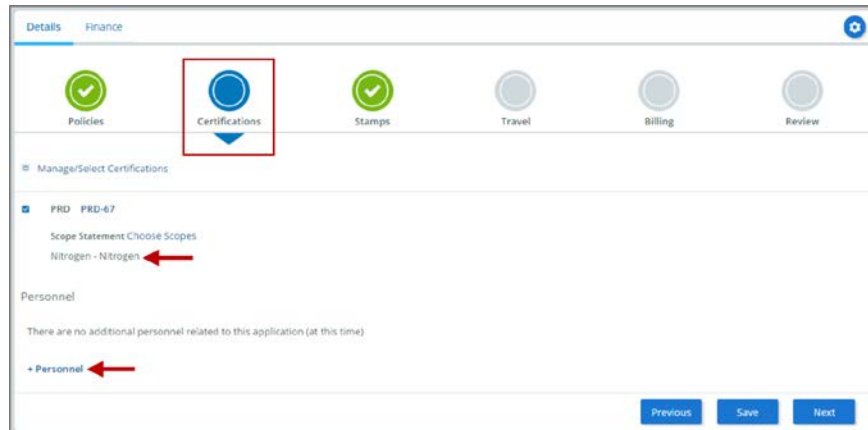
15. The Certificate Type and Certificate Number you are renewing will be added to the Certifications Tab. Click the **Choose Scopes** link.



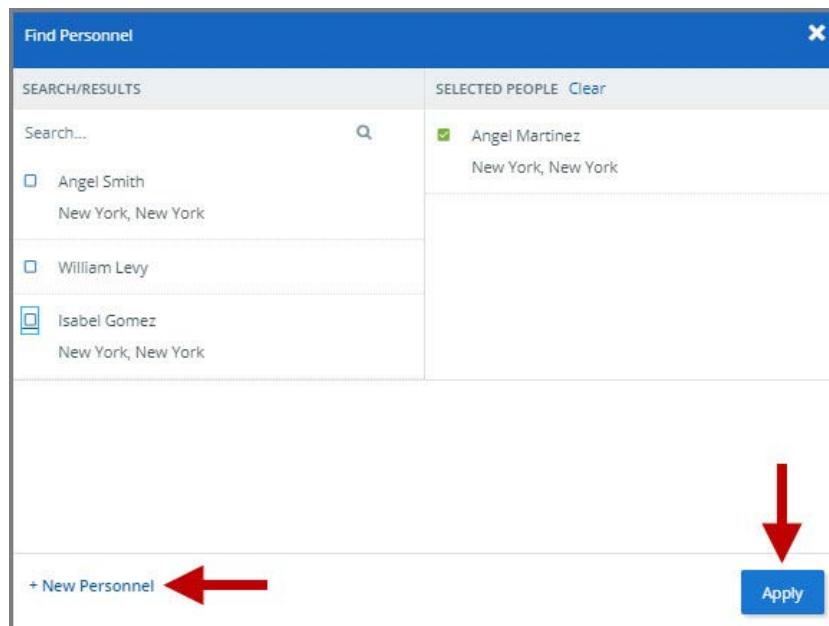
16. You will be directed back to the **Certifications** tab. Select the Scope Statement **Choose Scopes** link
17. You will be taken to the **Scopes** form. Select the applicable scope(s).
18. When done, click **Apply** to continue.



19. The Scope you selected is added to the **Certifications** tab.
20. Select the **Personnel** link on the Certifications tab.



21. The **Find Personnel** form is displayed and includes the names of the Individual Observers.
22. You can select the Individual Observers that are on the application and/or create a new individual observer.
23. To select an existing Individual Observer, select the checkbox preceding their name, then click the **Apply** option.



24. To add a new individual observer:
 - a. Enter the individual observer related information in the fields below.
 - b. Click the **Add Address** information to enter the address.
 - c. When done, click **Save** to continue. You will complete a form separately for each individual observer.

The 'Find Personnel' form contains the following fields:

- First Name: [First Name]
- Last Name: [Last Name]
- Primary Email: [Email Address]
- Credentials: []
- Master Customer ID: []
- Primary Phone: + [1] [] [Phone Number] ext. [Extension]
- + Add Address
- Buttons: Save, Cancel

- d. The Individual Observer information will be added to the **Find Personnel** form.
- e. To add another Individual Observer, click the **New Personnel** link and repeat the same steps to add each individual observer.
- 25. When done, click **Apply** to continue.
- 26. Select the **Manage/Select Certifications** link to connect the PRD Certificate Type to each person.

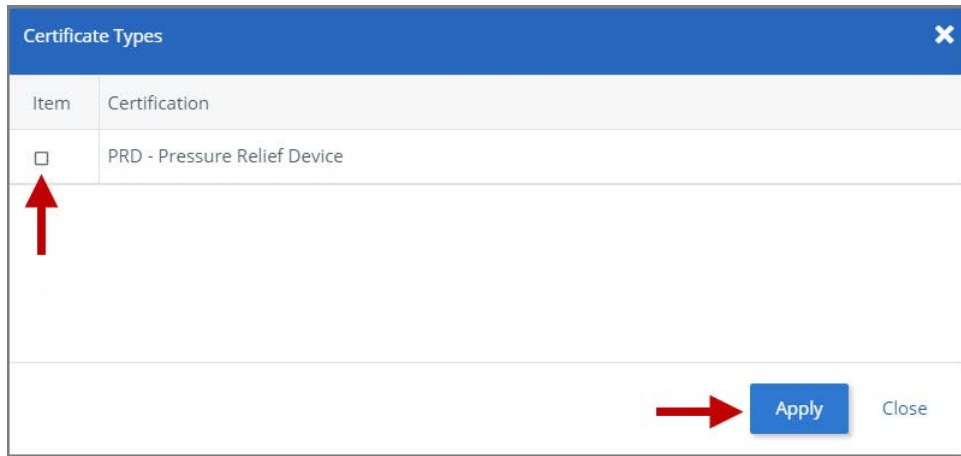
The 'Details Finance' page displays the following information:

- Navigation: Policies, Certifications, Stamps, Travel, Billing, Review
- Section: Manage/Select Certifications
- PRD: PRD-07
- Scope Statement: Choose Scopes
- Steam
- Personnel Table:

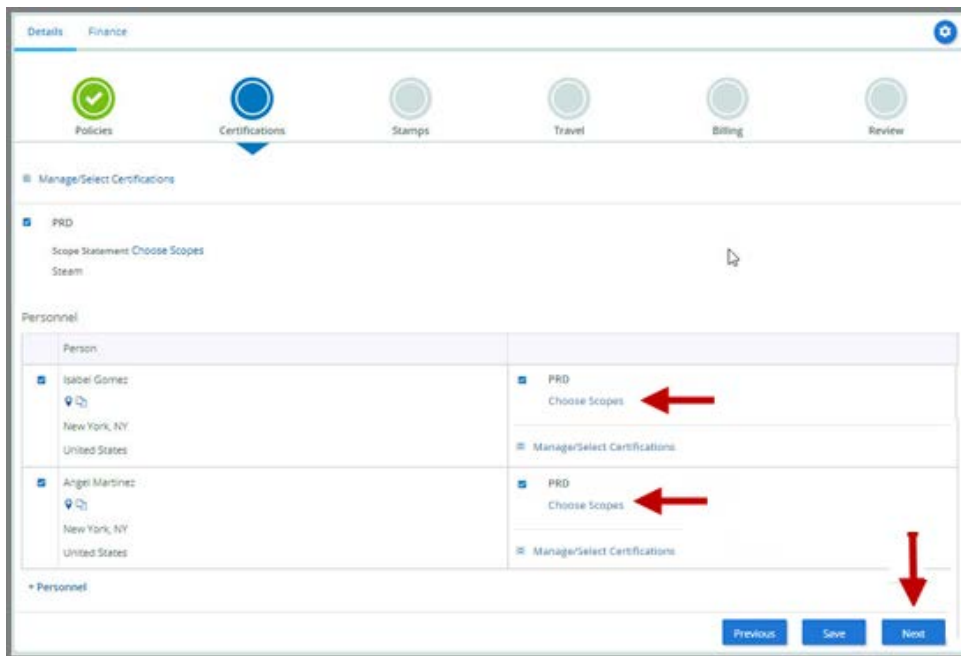
Person	Manage/Select Certifications
<ul style="list-style-type: none"> Isabel Gomez New York, NY United States 	<ul style="list-style-type: none"> Manage/Select Certifications
<ul style="list-style-type: none"> Angel Martinez New York, NY United States 	<ul style="list-style-type: none"> Manage/Select Certifications

Buttons: Previous, Save, Next

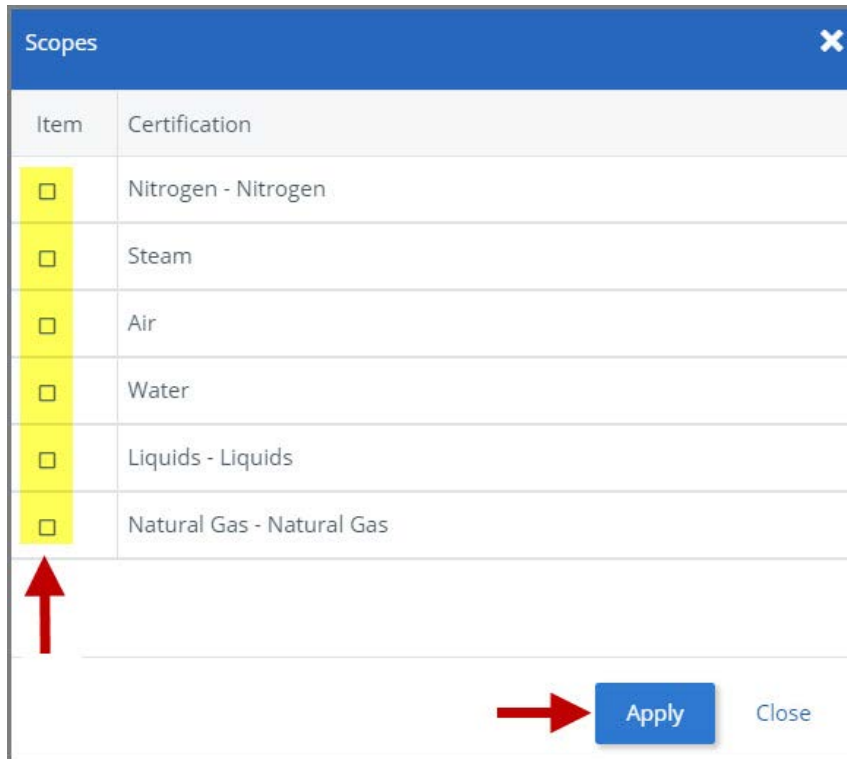
- 27. Select the **PRD-Pressure Relief Device** certificate type option.
- 28. When done, click **Apply** to continue.



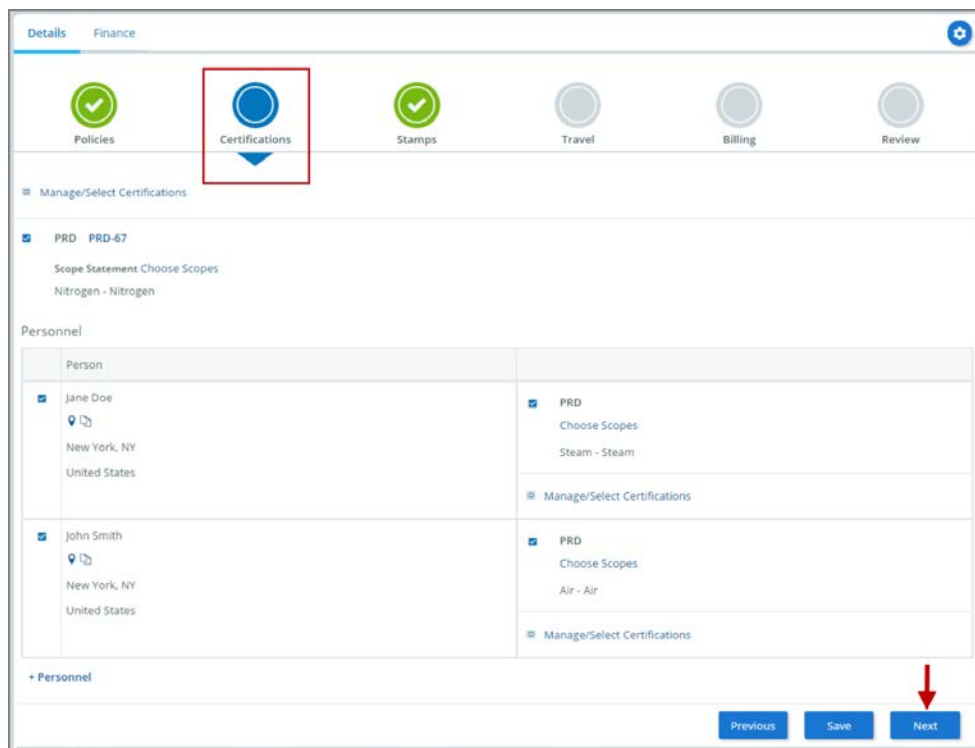
- 29. You will be directed back to the **Certifications** tab. Click **Next** to continue.



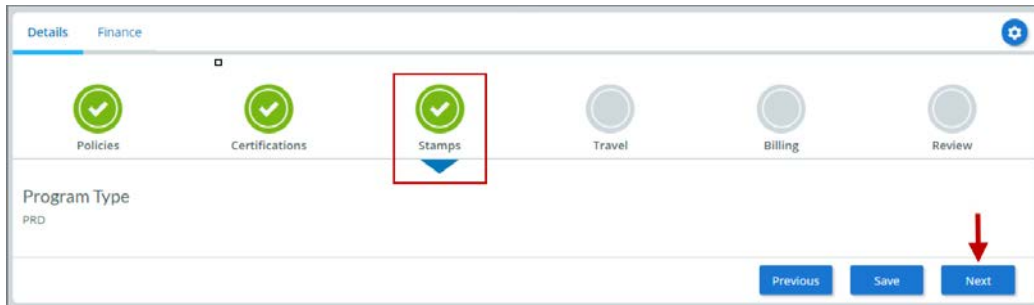
- 30. You will be directed back to the **Certifications** tab. Select the Scope Statement **Choose Scopes** link
- 31. You will be taken to the **Scopes** form. Select the applicable scope(s).
- 32. When done, click **Apply** to continue.
- 33. Repeat the same steps for each person (individual observer).



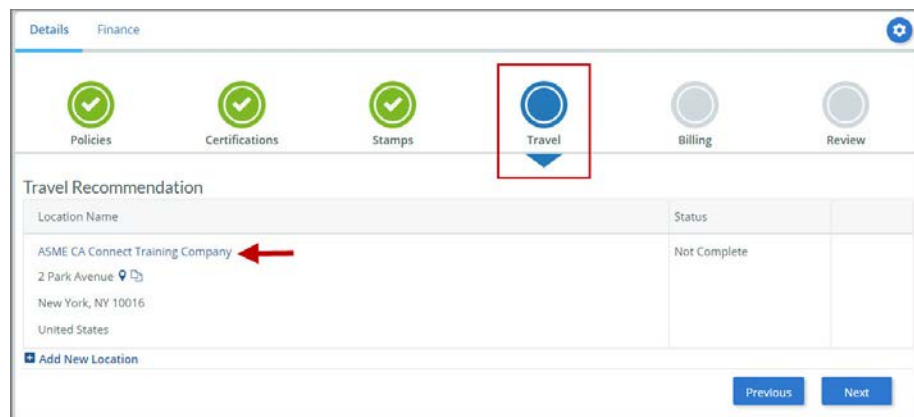
34. When done, click **Next** to continue.



35. Both the **Certifications** tab and **Stamps** tab are updated to reflect a green checkmark. Click **Next** to continue.



36. The application process will advance to the **Travel** tab.
37. The **Company Name** is displayed as a link under the Location Name label. Click on the link.



38. The **Travel Recommendation Detail** form is presented.
39. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
40. You must enter the information for all required fields which are denoted with a red * asterisks.
41. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
42. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
43. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. []

Save

44. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
45. When done, click **Save** to continue.

Please review the addresses below.

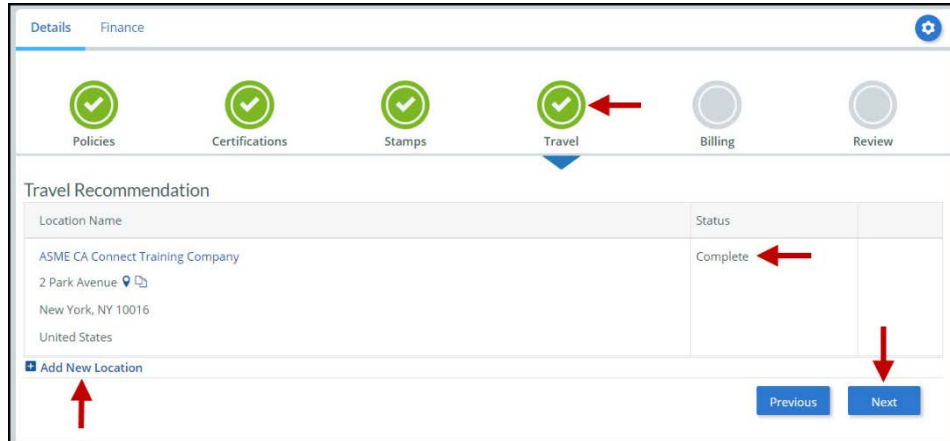
Hotel

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

Save Cancel

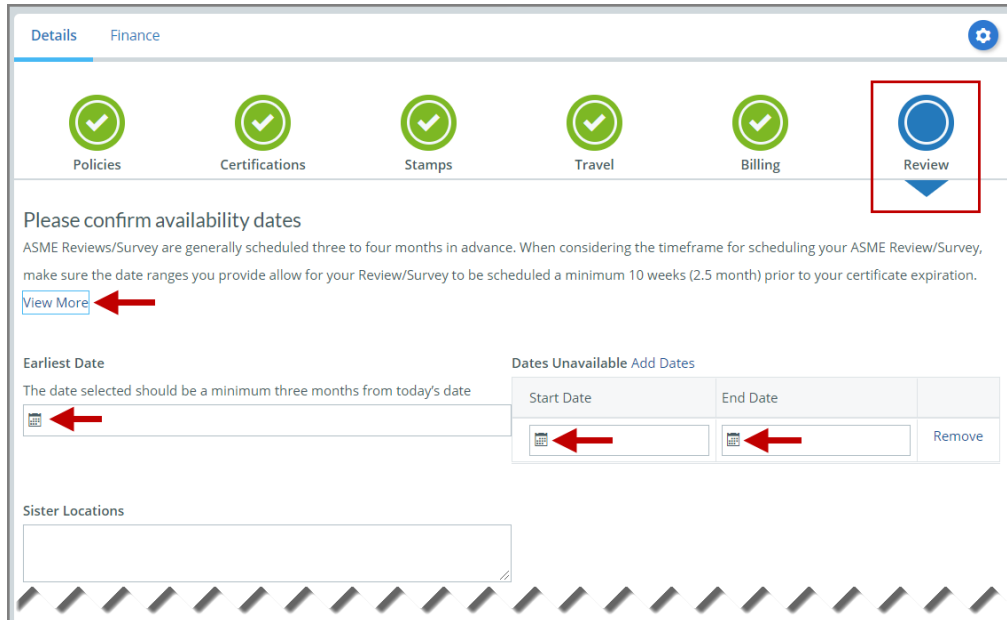
46. You will be redirected back to the Travel Tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - b. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
47. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
48. Confirm that the status for all locations is **Complete**, then click **Next** to continue.



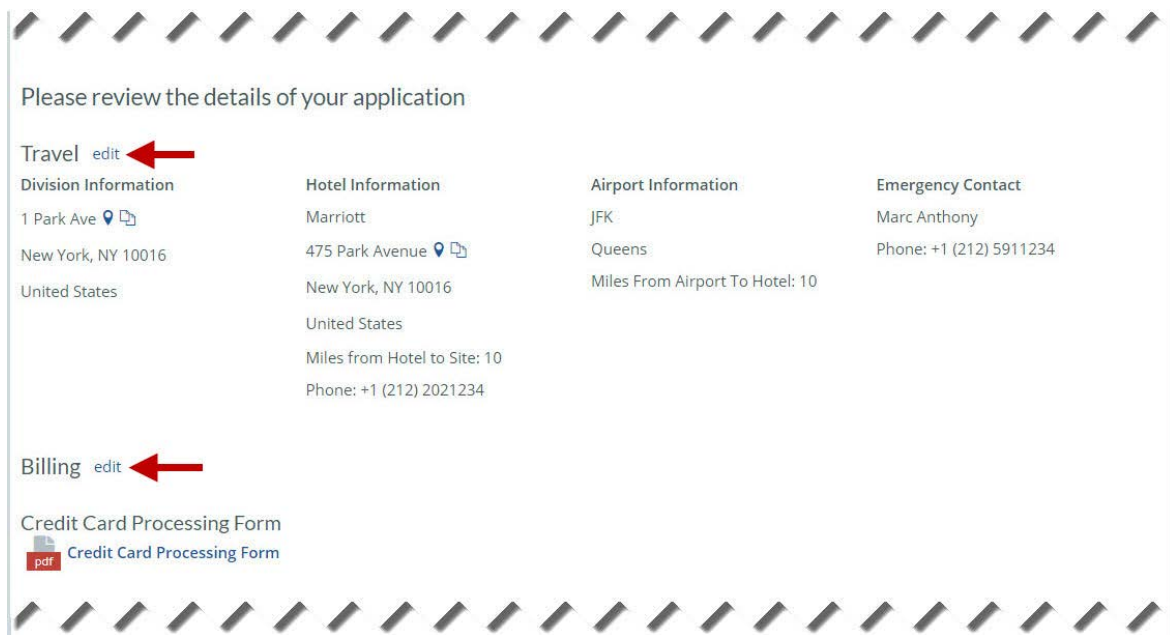
49. The **Travel** tab is updated to reflect a green checkmark.
50. Your application process will advance to the **Billing** tab.
51. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
52. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
53. When done, click **Next** to continue.

The screenshot shows a software interface with a top navigation bar containing tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The Billing tab is active and highlighted with a blue checkmark and a red box. Below the tabs, the Billing section is titled 'Billing' and includes a sub-header 'Billing Address' with options for 'Use Plant Address' and 'Use Mailing Address'. The form contains several input fields: Address Line 1, 2, and 3; Country (a dropdown menu); City; Zip/Postal Code; Contact/Attention; and Phone Number (with separate fields for country code and extension). On the right side, there are fields for Company Banking Details, Bank Account Name / Beneficiary, ABA Routing Number, Billing Contact Email, Account Number / IBAN #, SWIFT Code / BIC, Bank Transit Number, and Tax ID Number. A red arrow points to the 'Company Banking Details' header. At the bottom, there is a 'Credit Card Processing Form' link with a PDF icon, also highlighted with a red arrow. The 'Next' button is highlighted with a red arrow.

54. The **Billing** tab is updated to reflect a green checkmark. Your application process will advance to the **Review tab**.
55. The **Review tab** displays a summary of the information that was entered in each of the tabs.
56. Click the **View More** link to display additional information on availability dates.
57. Enter the **Earliest Date** that your company will be available for the review. Please note that dates you enter must be a minimum of three months in the future.
58. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note that dates you enter must be a minimum of three months in the future.



59. Prior to submitting the renewal application, confirm the information appearing on the Review tab is accurate and that all tabs are green with a checkmark. If they are not, you can return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
60. You can click the **Edit** links to modify any of the information you entered. This is the only opportunity you will have to alter any of the information prior to submission of the renewal application.
61. You can also download the **Credit Card Processing Form**.



62. Scroll down the tab and select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.
63. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
64. Select the **Upload Agreement Form** link.
65. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
66. Click **Save** to continue.

Banking Details

Bank Name:

ABA Routing Number:

Account Number/IBAN #:

Swift Code:

Bank Transit Number:

Bank Account Name:

Tax ID Number:

Contact/Attention Name: Contxxx

Contact/Attention Email:

Billing Address

1 Park Ave

New York, NY 10016

United States

Please print, sign and upload the Agreement Form

Instructions: Please click the "Print Agreement" button, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it. Scan the signed form and save it as a pdf file on your computer. Finally, upload the scanned document via the upload box located below the "Print Agreement" button.

Please upload only your completed Print Agreement Form. No other forms should be submitted via this upload box.

Download Agreement Form

Upload Agreement Form

Previous Save

67. Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

Previous Save Submit

68. You will be redirected to an **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application. Click the blue gear icon and select the **Print Document** link.
69. To print the application details, click the **Print Document** option.

Details Finance

Application Details

Application ID: FAB-130263

Print Document

QSC Program – Renewal and New Application

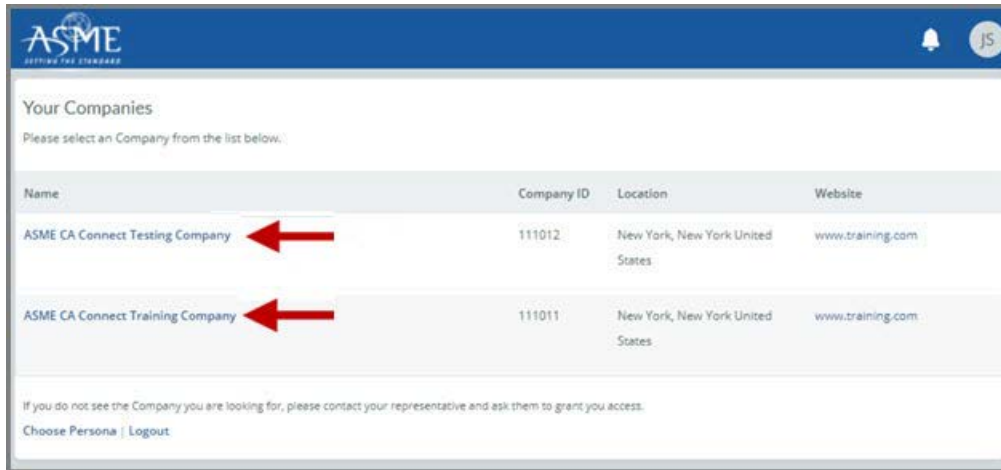
The information required to process information and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile, Certifications, Stamps, Travel, Billing, and Review**. Each tab consists of specific application details and downloading/uploading that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

1. To begin the process of renewing your certification, you must be logged into CA Connect as the company's Primary Contact.
2. Once you log in,
 - a. If you are associated with a single company you will be directed to your Company Dashboard.

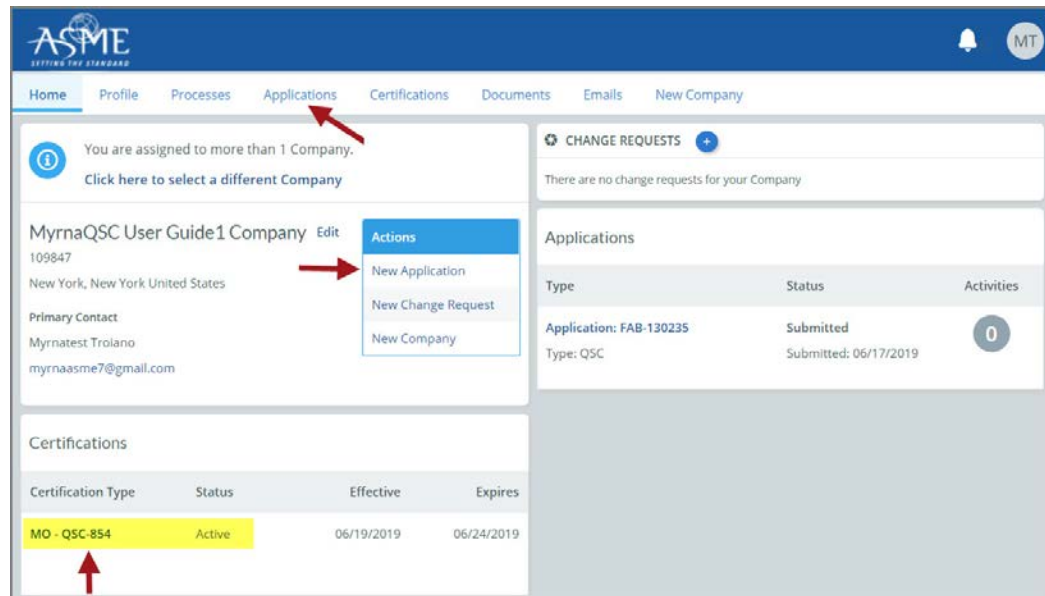
The screenshot shows the ASME CA Connect user dashboard. The top navigation bar includes the ASME logo and the tagline 'SETTING THE STANDARD'. The user's name 'MT' is visible in the top right corner. The main navigation menu includes Home, Profile, Processes, Applications, Certifications, Documents, Emails, and New Company. The dashboard content is divided into several sections:

- Company Selection:** A message states 'You are assigned to more than 1 Company. Click here to select a different Company'.
- Company Profile:** Displays 'MyrnaQSC User Guide1 Company' with an 'Edit' link. Below this, it shows the company ID '109847', location 'New York, New York United States', and primary contact 'Myrnatest Troiano' with email 'myrnaasme7@gmail.com'. An 'Actions' menu is open, showing options for 'New Application', 'New Change Request', and 'New Company'.
- Change Requests:** A section titled 'CHANGE REQUESTS' with a '+' icon, indicating 'There are no change requests for your Company'.
- Applications:** A table with columns 'Type', 'Status', and 'Activities'. One application is listed: 'Application: FAB-130235' with status 'Submitted' and a submission date of '06/17/2019'. The 'Activities' column shows a count of '0'.
- Certifications:** A table with columns 'Certification Type', 'Status', 'Effective', and 'Expires'. One certification is listed: 'MO - QSC-854' with status 'Active', effective date '06/19/2019', and expiration date '06/24/2019'.

- b. If you are associated with multiple companies, you will first be directed to a list of your companies.
 - 1) Once you select the Company, you will be directed to the Company Dashboard.



3. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.



4. The Applications tab will open so that you can begin create a new application for the renewal certification process.
5. The default and first Application tab is the **Policies** tab. Review all information displayed on the tab.
6. Scroll down the page to the **Extension Policy** section.
7. If you want to see the policy on Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
8. Check the **I have reviewed and agreed to the above policies** box.
9. Click **Next** to continue.

ASME CA Connect Training Company

111011
New York, NY
www.training.com

Primary Contact
Jane Smith
jsmith@training.com
+1 (212) 5911111

Activities: 0 No activities scheduled. There are no activities scheduled for this application at this time.

Processes: 0 No active Application Process. No application processes have been started for this application.

Details Finance

Policies Certifications Stamps Travel Billing Review

Final Invoice
For reviews/Surveys conducted by ASME, a final invoice will be rendered. It will contain the fees and expenses of the ASME Designee. If there is a balance due to ASME, certificates and stamps cannot be issued until the invoice is paid.

Cancellation - Reviews/Surveys scheduled by ASME
Cancellation of review/survey dates scheduled by ASME is subject to a monetary penalty, deducted from the advanced deposit in the following schedule:

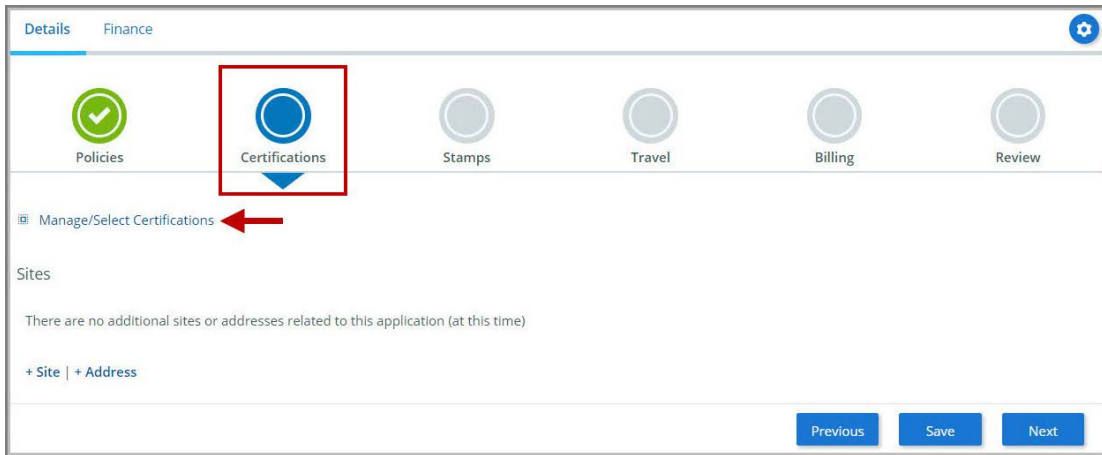
- \$2,000 for cancellation after acceptance of review/survey dates.
- \$3,500 for cancellation within 2 months of review/survey dates.
- \$6,000 for cancellation within 1 months of review/survey dates.

Extension Policy
In order to be eligible for an extension of the expiration date stated on a Certificate, the renewal application and all applicable fees, including advance payments, must be received not later than six (6) months prior to the expiration date on the Certificate.
This will ensure that the renewal process will be completed prior to the expiration date indicated on the Certificate. Furthermore, the Certificate Holder must indicate available dates more than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling Information Form.
If ASME cannot schedule the review/survey on the dates included, then an extension will be granted.
Please see the Policy on Request for Extension under [General Downloads](#) for more information.

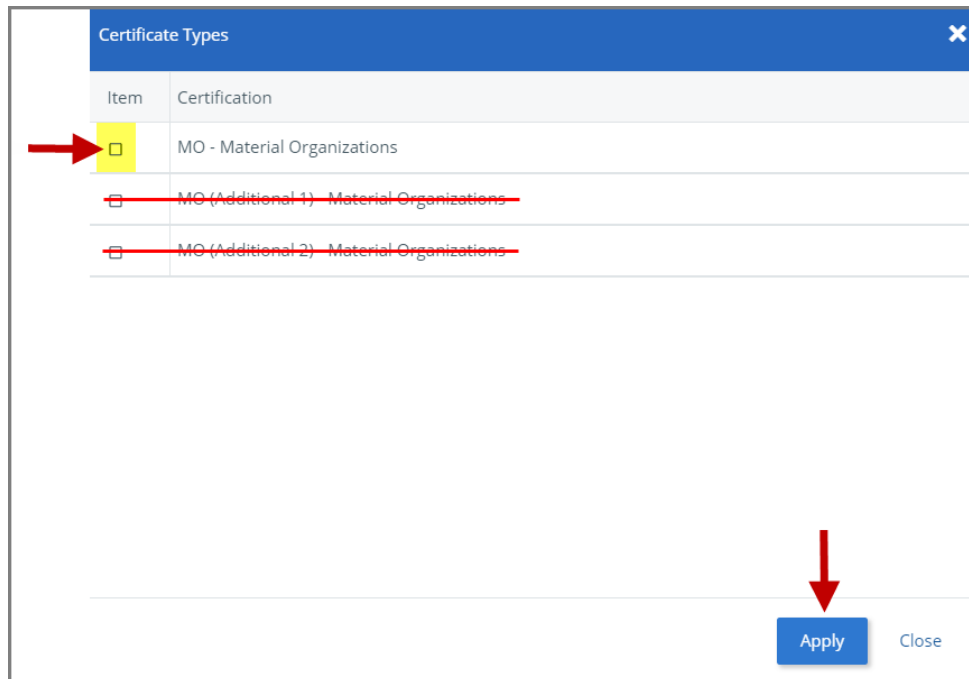
I have reviewed and agreed to the above policies.

Next

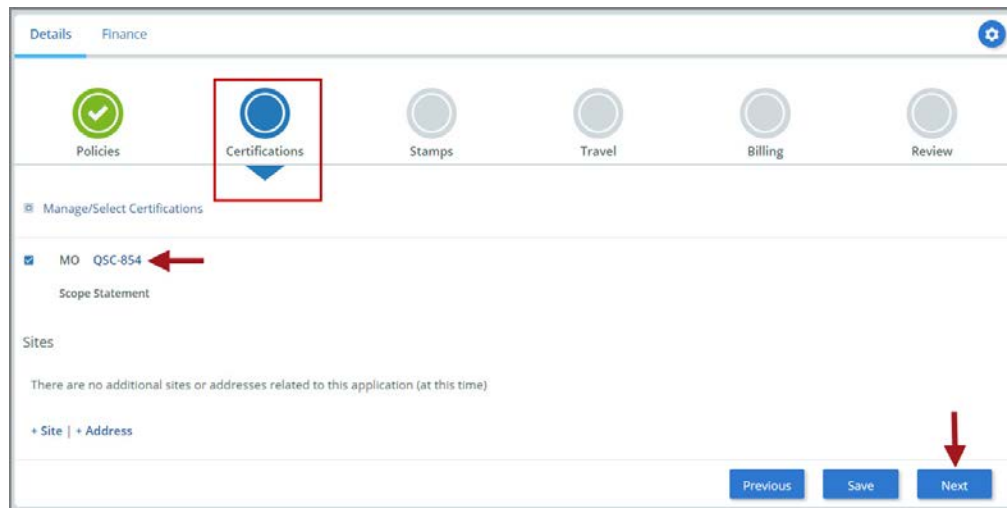
10. The **Policies** tab is updated to reflect a green checkmark.
11. Your application process will advance to the **Certifications** tab.
12. Click the **Manage/Select Certifications** link or checkbox.



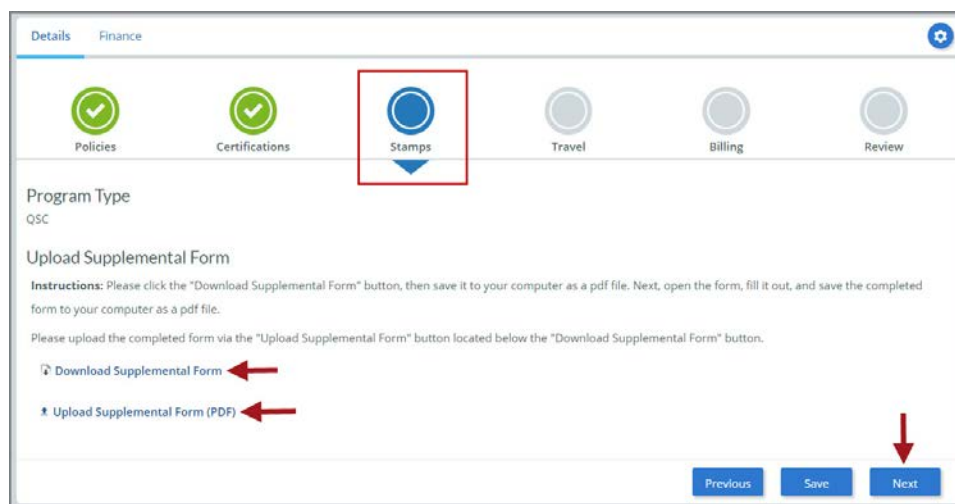
13. The Certificate Types form is displayed containing the **MO-Material Organizations** certificate type. Select the Certificate Type for the certificate(s) you are renewing.
14. When done, click **Apply** to continue.



- The Certificate Type and Certificate Number you are renewing will be added to the Certifications Tab.



- The **Certifications** tab is updated to reflect a green checkmark.
- Your application process will advance to the **Stamps** tab.
- Select an **Authorized Inspection Agency** from the list of AIA Organizations by clicking on the down arrow then select the organization.
- Click on the **Download Supplemental Form** link.
- The **Supplemental Application Form** is downloaded to your local drive.
- Complete the supplemental form.
- Save the completed form on your local drive.
- Click the **Upload Supplemental Form (PDF)** link.
- Locate the completed supplemental form on your local drive and upload the form.
- When done, click **Next** to continue.



- The **Stamps** tab is updated to reflect a green checkmark. The application process will advance to the **Travel** tab.

27. The **Company Name** is displayed as a link under the Location Name label. Click on the link.

Location Name	Status
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Not Complete

28. The **Travel Recommendation Detail** form is presented.
29. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
- Note:** The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
30. You must enter the information for all required fields which are denoted with a red * asterisks.
31. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
32. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
33. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. [] []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. [] []

Save

34. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
35. When done, click **Save** to continue.

Please review the addresses below.

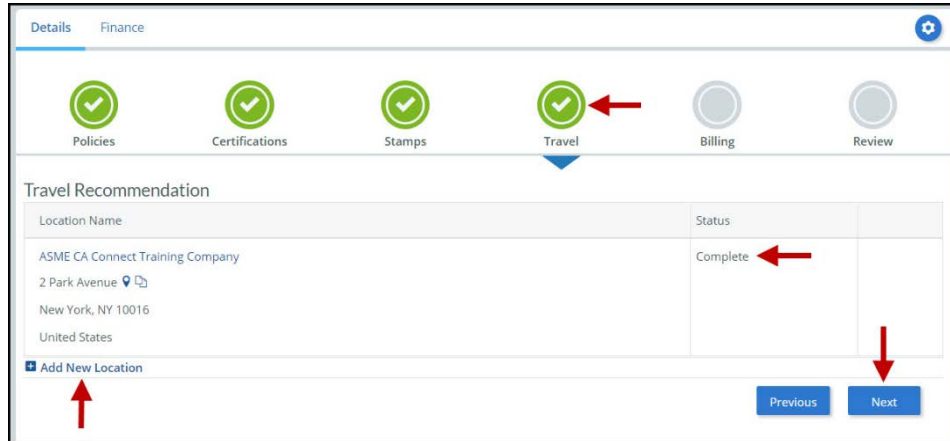
Hotel

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

Save Cancel

36. You will be redirected back to the Travel Tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
37. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
38. Confirm that the status for all locations is **Complete**, then click **Next** to continue.



39. The **Travel** tab is updated to reflect a green checkmark.
40. Your application process will advance to the **Billing** tab.
41. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
42. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
43. When done, click **Next** to continue.

Details Finance

Policies Certifications Stamps Travel **Billing** Review

Billing
A retainer is billed to cover cost associated with the review/survey. Any left over remittance will be refunded.

Billing Address
Use Plant Address Use Mailing Address

Address Line 1
Address Line 1

Address Line 2
Address Line 2

Address Line 3
Address Line 3

Country
Select Country

City

Zip/Postal Code

Contact/Attention

Phone Number
+ ext.

Company Banking Details
Please provide the following information to allow ASME to refund any left over remittance.

Company Banking Details

Bank Account Name / Beneficiary

ABA Routing Number

Billing Contact Email

Account Number / IBAN #

SWIFT Code / BIC

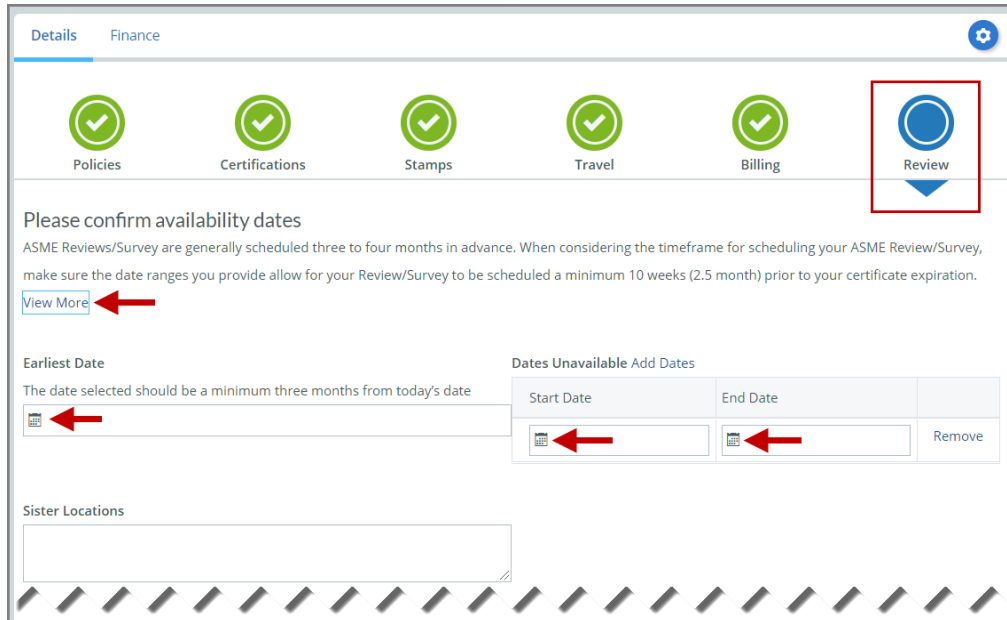
Bank Transit Number

Tax ID Number

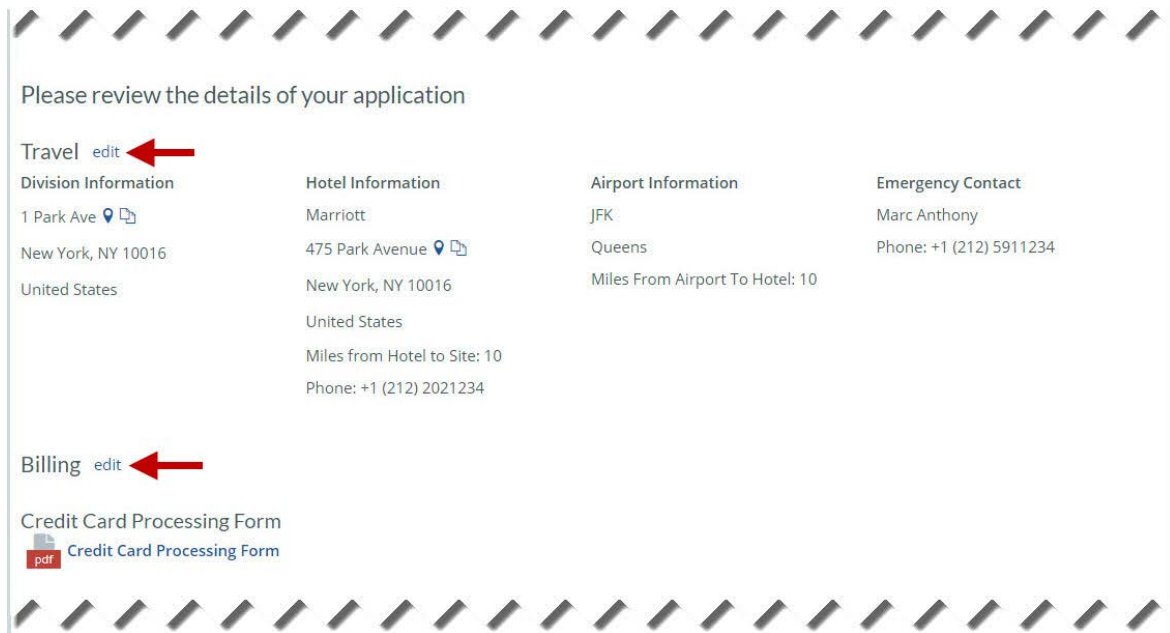
Credit Card Processing Form
Credit Card Processing Form

Previous Save Next

44. The **Billing** tab is updated to reflect a green checkmark. Your application process will advance to the **Review tab**.
45. The **Review tab** displays a summary of the information that was entered in each of the tabs.
46. Click the **View More** link to display additional information on availability dates.
47. Enter the **Earliest Date** that your company will be available for the review. Please note that dates you enter must be a minimum of three months in the future.
48. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note that dates you enter must be a minimum of three months in the future.



49. Prior to submitting the renewal application, confirm the information appearing on the Review tab is accurate and that all tabs are green with a checkmark. If they are not, you can return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
50. You can click the **Edit** links to modify any of the information you entered. This is the only opportunity you will have to alter any of the information prior to submission of the renewal application.
51. You can also download the **Credit Card Processing Form**.



52. Scroll down the tab and select the **Upload Company Manual** link. Locate the manual on your local computer and upload the file.
53. Click the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.
54. Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
55. Select the **Upload Agreement Form** link.
56. Locate the signed agreement form on your local computer and upload the file.
 - b. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
57. Click **Save** to continue.

Banking Details

Bank Name:

ABA Routing Number:

Account Number/IBAN #:

Swift Code:

Bank Transit Number:

Bank Account Name:

Tax ID Number:

Contact/Attention Name: Contxxx

Contact/Attention Email:

Billing Address

1 Park Ave

New York, NY 10016

United States

Please upload your company manual

Instructions: Upload your company manual via the upload box below.

Please upload only your Company Manual. No other forms should be submitted via this upload box.

[Upload Company Manual](#)

Please print, sign and upload the Agreement Form

Instructions: Please click the "Print Agreement" button, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it. Scan the signed form and save it as a pdf file on your computer. Finally, upload the scanned document via the upload box located below the "Print Agreement" button.

Please upload only your completed Print Agreement Form. No other forms should be submitted via this upload box.

[Download Agreement Form](#)

[Upload Agreement Form](#)

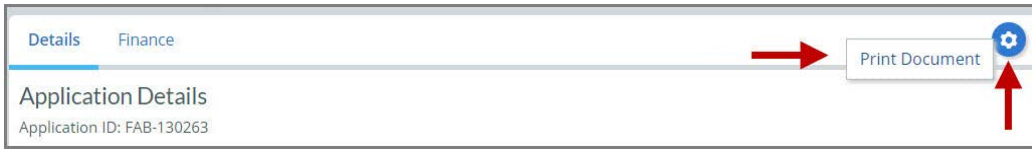
Previous Save

58. Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

Previous Save Submit

59. You will be redirected to an **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application. Click the blue gear icon and select the **Print Document** link.

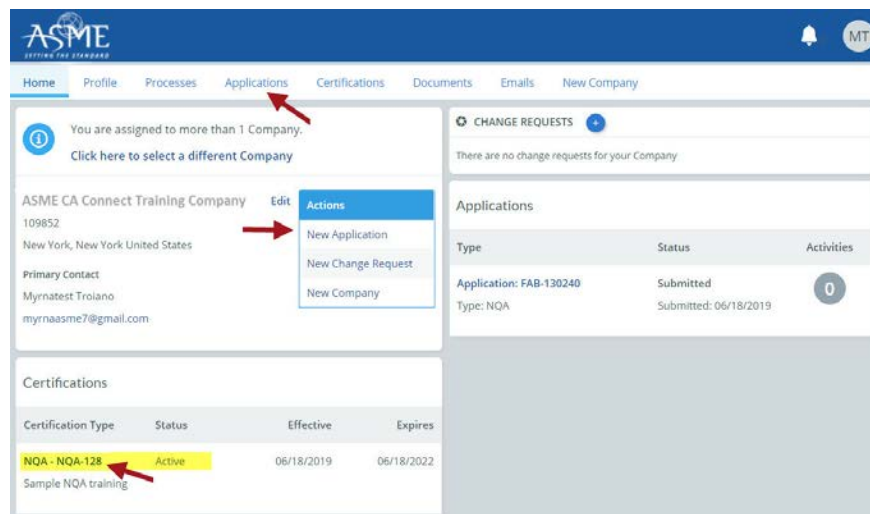
60. To print the application details, click the **Print Document** option.



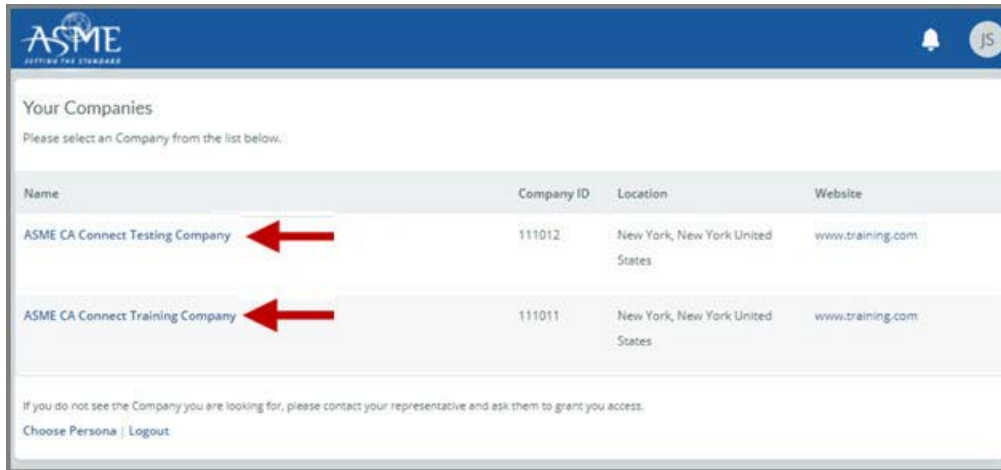
RTP Program – Renewal and New Application

The information required to process information and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps. The application tabs are **Profile, Certifications, Stamps, Travel, Billing, and Review**. Each tab consists of specific application details and downloading/uploading that are required and driven by the Program Type. In order to submit an application, you must complete all required information found in each of the tabs.

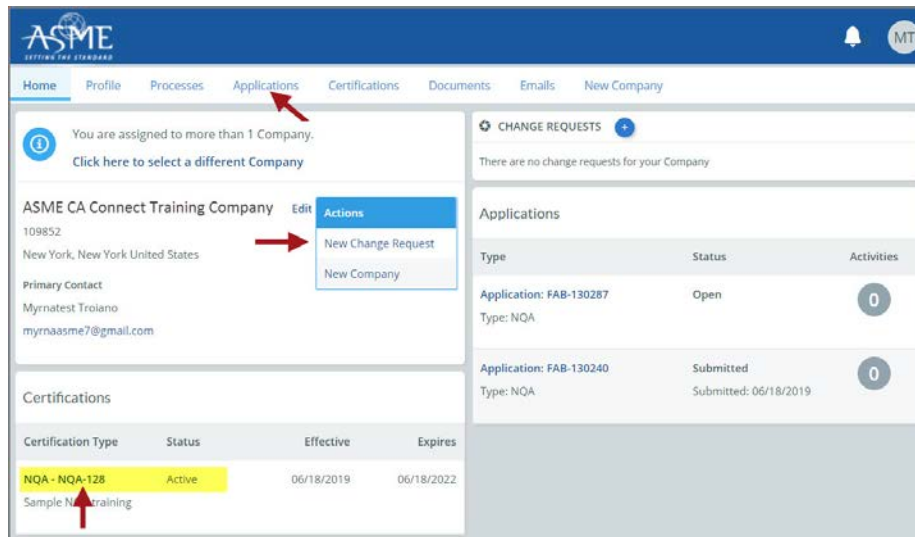
1. To begin the process of renewing your certification, you must be logged into CA Connect as the company's Primary Contact.
2. Once you log in,
 - a. If you are associated with a single company you will be directed to your Company Dashboard.



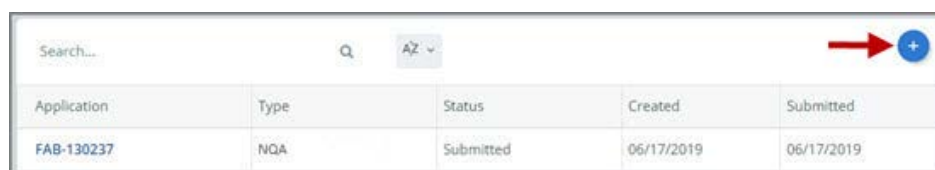
- b. If you are associated with multiple companies, you will first be directed to a list of your companies.
 - 1) Once you select the Company, you will be directed to the Company Dashboard.



3. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.

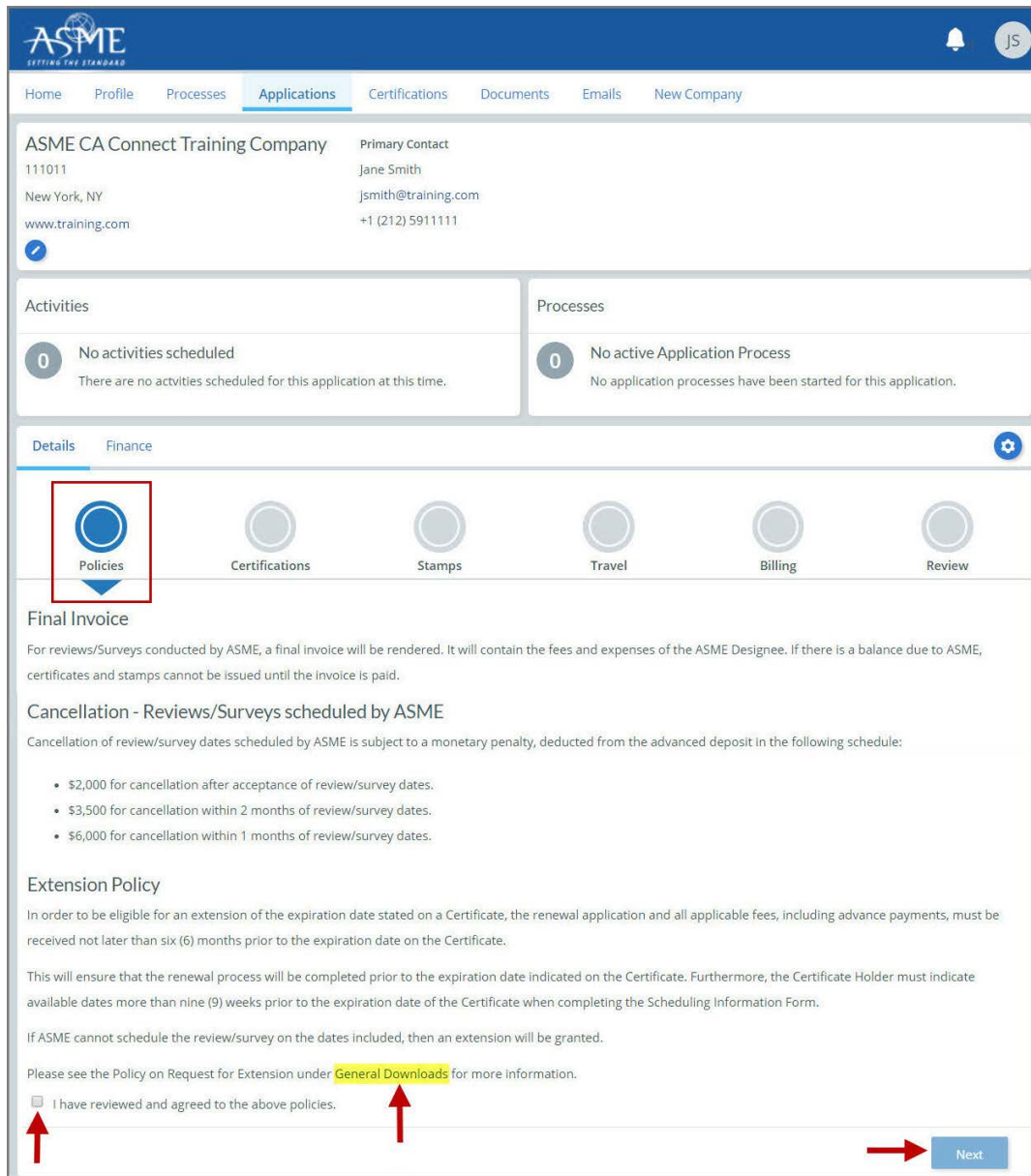


4. The **Applications** tab will open so that you can begin to create a renewal application for the certification you hold.
5. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.

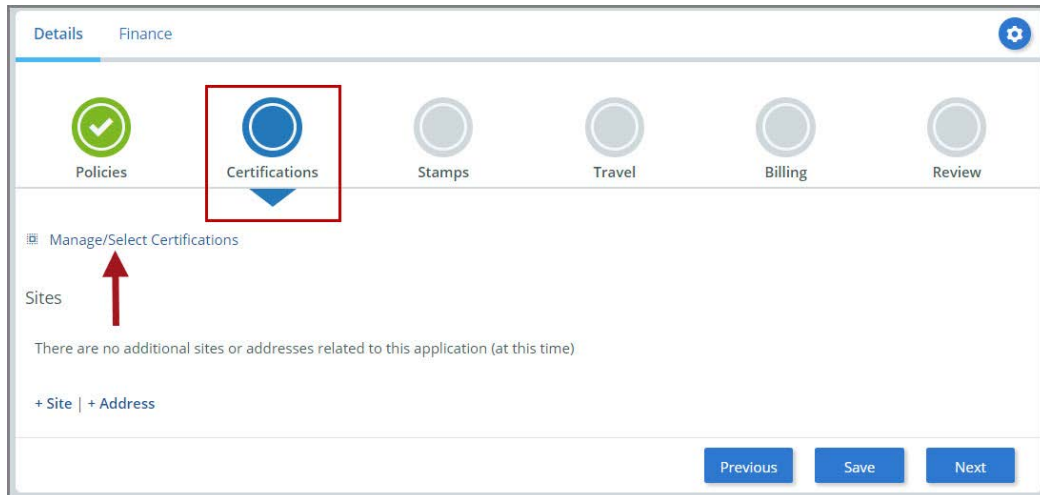


6. The first application tab is the **Policies** tab. Review all information displayed on the tab.
7. Scroll down the page to the **Extension Policy** section.

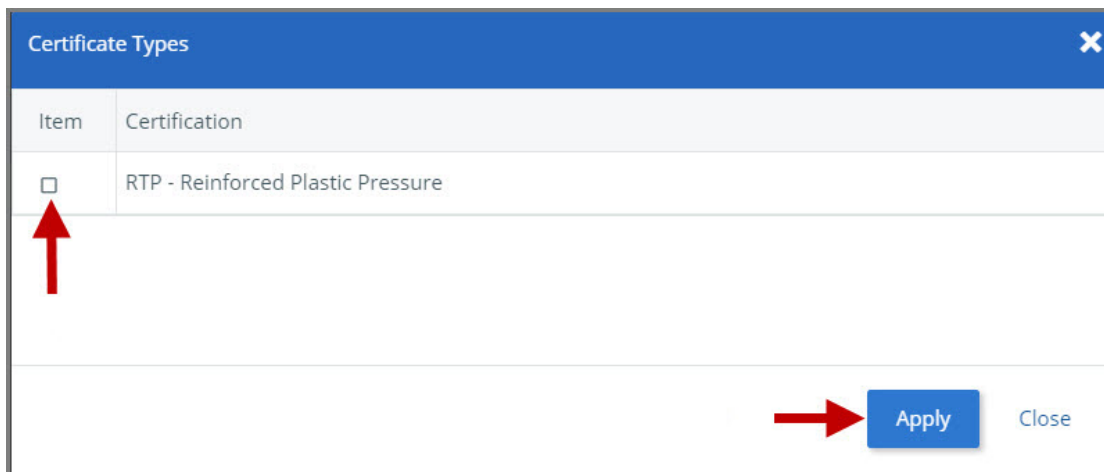
8. If you want to see the policy relating to a Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org** website **Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
9. Check **I have reviewed and agreed to the above policies** checkbox.



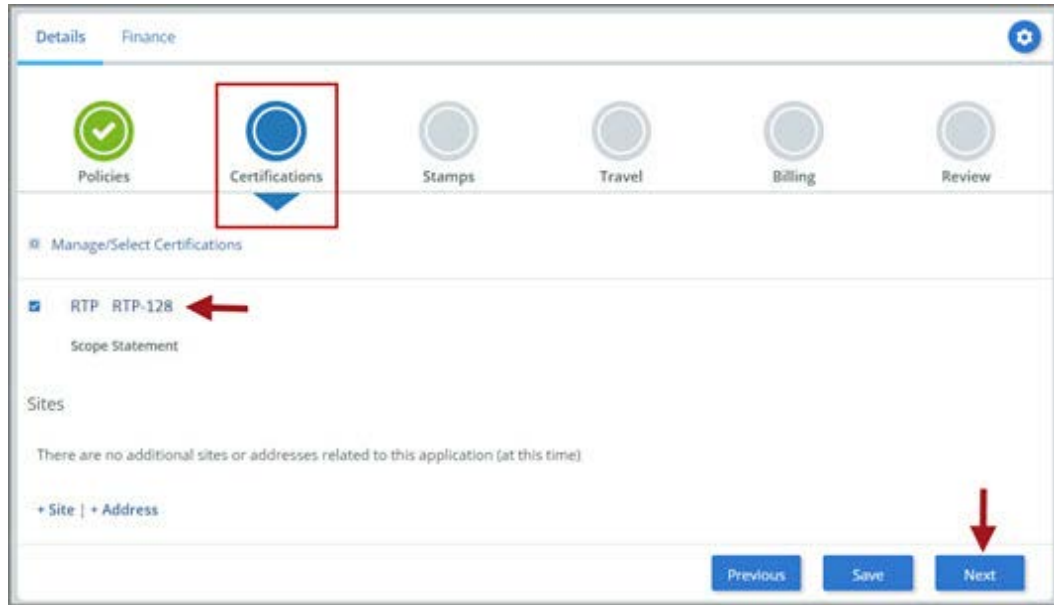
10. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications tab**.
11. Click the **Manage/Select Certifications** link or checkbox.



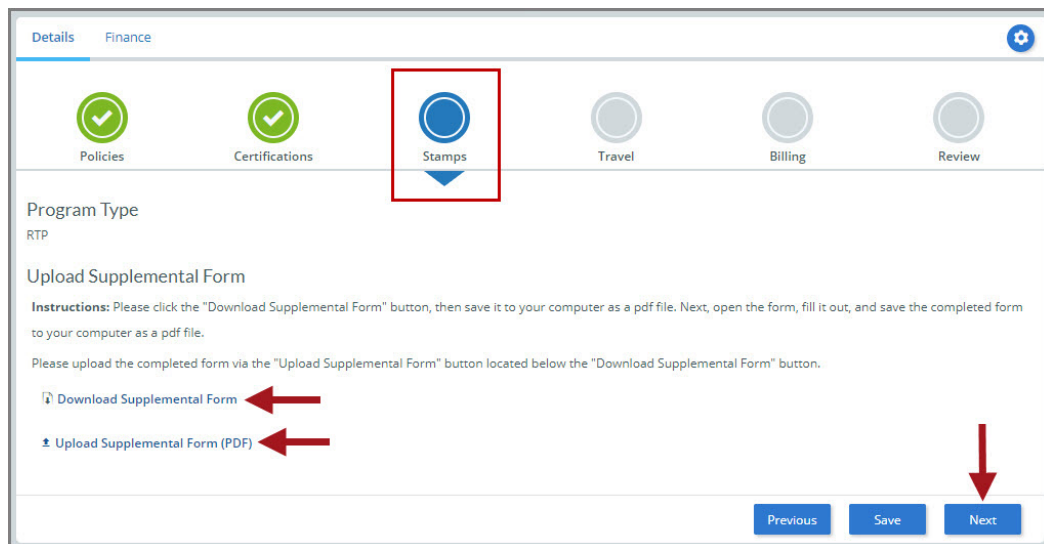
12. The Certificate Types form is displayed. Select the RTP Certificate Type.
13. When done, click **Apply** to continue.



14. The RTP Certificate Type and Certificate Number that you are renewing will be added to the Certifications tab.
15. When done, click **Next** to continue.



16. The **Certifications** tab is updated to reflect a green checkmark. The application data processing will advance to the **Stamps** tab.
17. Click on the **Download Supplemental Form** link.
18. The **Supplemental Application Form** is downloaded to your local drive.
19. Complete the supplemental form.
20. Save the completed form on your local drive.
21. Click the **Upload Supplemental Form (PDF)** link.
22. Locate the completed supplemental form on your local drive and upload the form.
23. When done, click **Next** to continue.



24. The **Stamps** tab is updated to reflect a green checkmark. The application process will advance to the **Travel** tab.
25. The **Company Name** is displayed as a link under the Location Name label. Click on the link.

Details Finance

Policies Certifications Stamps **Travel** Billing Review

Travel Recommendation

Location Name	Status	
ASME CA Connect Training Company 2 Park Avenue New York, NY 10016 United States	Not Complete	

Previous Next

26. The **Travel Recommendation Detail** form is presented.
27. The **Company Plant Address** is pre-populated and displayed in each of the designated fields.
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.
28. You must enter the information for all required fields which are denoted with a red * asterisks.
29. Do not include dashes when entering Phone Numbers throughout the entire application. Be sure to include the 3-digit area code.
30. Enter the Hotel, Airport, and Emergency Contact information in the assigned fields.
31. When done, click **Save** to continue.

Travel Recommendation Detail

* Indicates required fields

Location Details

Division Name
ASME CA Connect Training Company

Address Line 1
2 Park Avenue

Address Line 2

Country
United States

State
New York

City
New York

Zip/Postal Code
10016

Hotel

Name *

Address *

Country *
Select Country

City *

Zip/Postal Code

Phone *
+ [] [] [] [] ext. []

Fax
+ [] [] [] []

Miles from hotel to site *

Airport

Name *

City *

Miles from airport to hotel *

Transportation *
Select Transportation

Emergency Contact

Name *

Phone *
+ [] [] [] [] ext. []

Save

32. The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
33. When done, click **Save** to continue.

Please review the addresses below.

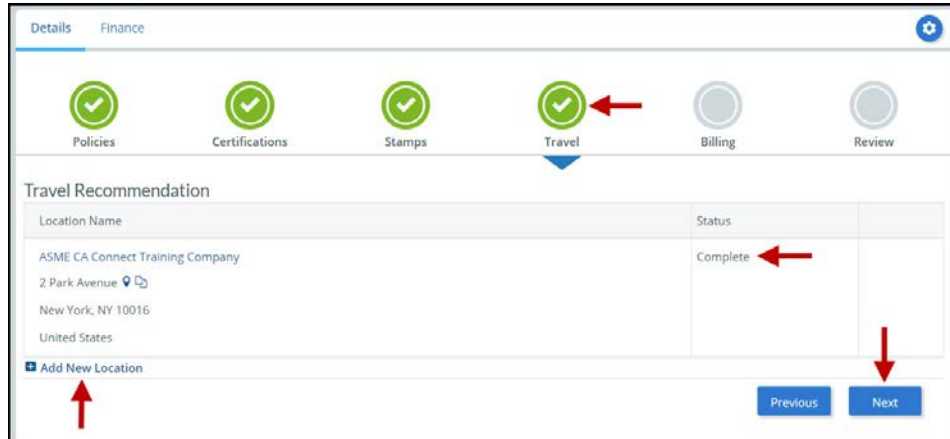
Hotel

USPS Validated	You Entered
2 Park Ave	2 Park Avenue
New York, NY 10016	new york, NY 10013
United States	United States

Use Valid USPS Address

Save Cancel

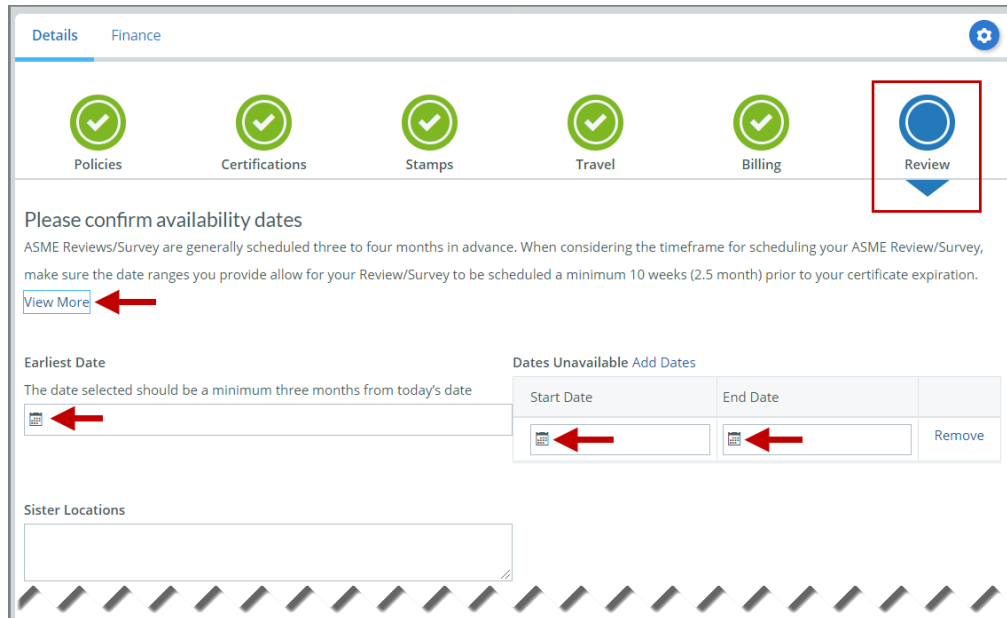
34. You will be redirected back to the **Travel** tab. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.
 - a. If the Travel tab is gray, this indicates that required information was missing. Return to the **Travel Recommendation Details** page by clicking on the **Company Name** link. Review the information previously entered and enter the missing information.
35. If you want to add another location, click the + Add **New Location** link and follow the same steps written above.
36. Confirm that the status for all locations is **Complete**, then click **Next** to continue.



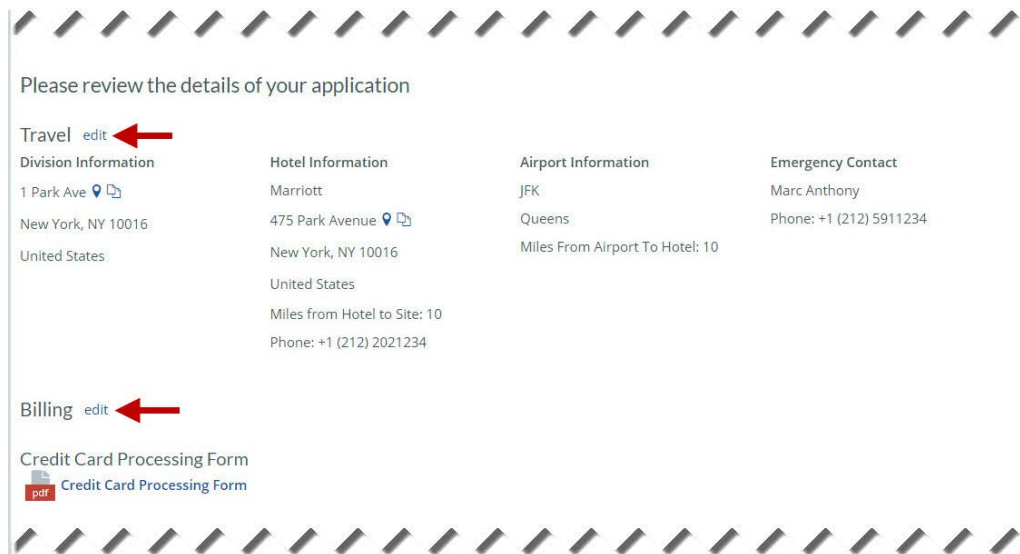
37. The **Travel** tab is updated to reflect a green checkmark. The application data processing will advance to the **Billing tab**.
38. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the address for the Billing Address or you can enter a different address. This information is required and must be entered in order for the application to be submitted.
39. In the **Company Banking Details** section,
 - a. Enter the banking details in the fields provided on the tab.
 - b. Click the **Credit Card Processing Form** link to download the form. Complete the **Credit Card Processing Form** and fax the completed form to ASME.
40. When done, click **Next** to continue.

The screenshot shows a software interface with a top navigation bar containing tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The Billing tab is active, indicated by a green checkmark and a red box. Below the tabs, the Billing section is titled 'Billing' and includes a note: 'A retainer is billed to cover cost associated with the review/survey. Any left over remittance will be refunded.' The form is divided into two columns. The left column contains 'Billing Address' fields: 'Address Line 1', 'Address Line 2', 'Address Line 3', 'Country' (a dropdown menu), 'City', 'Zip/Postal Code', 'Contact/Attention', and 'Phone Number'. The right column contains 'Company Banking Details' fields: 'Bank Account Name / Beneficiary', 'ABA Routing Number', 'Billing Contact Email', 'Account Number / IBAN #', 'SWIFT Code / BIC', and 'Bank Transit Number'. Below these fields is a 'Credit Card Processing Form' section with a PDF icon and a link labeled 'Credit Card Processing Form'. At the bottom right, there are three buttons: 'Previous', 'Save', and 'Next'. Red arrows point to the 'Company Banking Details' header, the 'Credit Card Processing Form' link, and the 'Next' button.

41. The **Billing** tab is updated to reflect a green checkmark. The application data processing will advance to the **Review tab**.
42. The **Review tab** displays a summary of the information that was entered in each of the tabs.
43. Click the **View More** link to display additional information on availability dates.
44. Enter the **Earliest Date** that your company will be available for the review. Please note the dates you enter must be a minimum of three months in the future.
45. Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note the dates you enter must be a minimum of three months in the future.



46. Prior to submitting the application, confirm the information appearing on the **Review** tab is accurate and that all tabs are green with a checkmark. If they are not, return to the uncheck tab using the **Previous** button or clicking on the tab. Enter the missing information on that tab, then return to the Review tab.
47. Select the **Edit** links to modify any of the information you entered.
48. Click on the **Credit Card Processing Form** to download the form if needed.



49. Scroll down the tab and select the **Upload Company Manual** link. Locate the file on your local computer and upload it.
50. Click the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.

51. Locate the file and complete, sign, and save the complete Agreement Form on your local computer.
52. Select the **Upload Agreement Form** link.
53. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
54. Click **Save** to continue.

Banking Details

Bank Name:

ABA Routing Number:

Account Number/IBAN #:

Swift Code:

Bank Transit Number:

Bank Account Name:

Tax ID Number:

Contact/Attention Name: Contxxx

Contact/Attention Email:

Billing Address

1 Park Ave

New York, NY 10016

United States

Please upload your company manual

Instructions: Upload your company manual via the upload box below.

Please upload only your Company Manual. No other forms should be submitted via this upload box.

Upload Company Manual

Please print, sign and upload the Agreement Form

Instructions: Please click the "Print Agreement" button, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it. Scan the signed form and save it as a pdf file on your computer. Finally, upload the scanned document via the upload box located below the "Print Agreement" button.

Please upload only your completed Print Agreement Form. No other forms should be submitted via this upload box.

Download Agreement Form

Upload Agreement Form

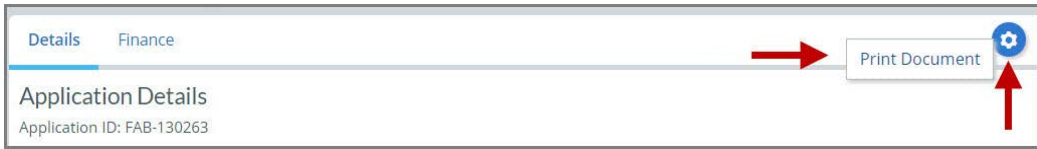
Previous Save

Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.

IMPORTANT: This is the only opportunity you will have to alter any of the information prior to submission of the application. After the application is submitted, in order to make any changes, you will need to submit a change request to ASME.

Previous Save Submit

55. You will be redirected to the **Application Details** section of the Applications tab. On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.
56. Click the blue gear icon and select the **Print Document** link.



In Process Application

Once an application has been submitted, you can review the application/certification details and status while the application certification is in process. The following information can be obtained via the Company Dashboard:

Applications Details:

1. To view an application, click on either the Application Number in the Applications section or the Applications tab on the menu bar.

Certification Details:

1. Click the Certificate Type and Number for an Active certificate, the Certificate Type for a Pending certificate, or the Certifications tab on the menu bar.

The screenshot shows the Company Dashboard for 'MyrnaBPV UserGuide Company1'. The dashboard includes a navigation bar with tabs: Home, Profile, Processes, Applications, Certifications, Documents, Emails, and New Company. A notification states 'You are assigned to more than 1 Company. Click here to select a different Company'. The 'Applications' section shows a table with two entries:

Type	Status	Activities
Application: FAB-130263 Type: Boiler	Submitted Submitted: 06/18/2019	0
Application: FAB-130218 Type: Boiler	Submitted Submitted: 06/17/2019	0

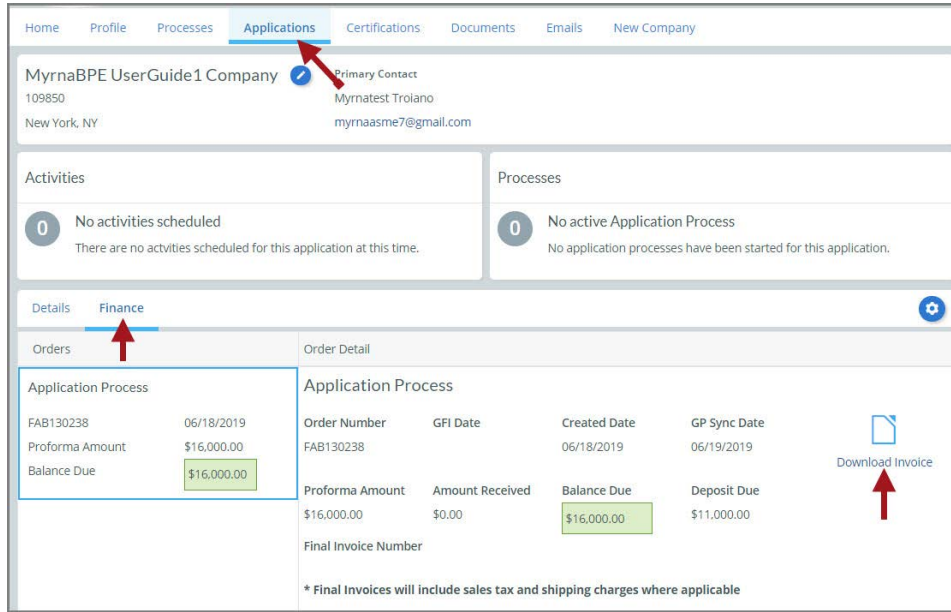
The 'Certifications' section shows a table with the following data:

Certification Type	Status	Effective	Expires
A - 57797 A-1 - Assembly of power boilers at field sites controlled by the above location	Active	06/18/2019	07/02/2019
A	Pending		

Finance Details:

1. To view the online payment order details and generate the Proforma Invoice
2. First open the Application (see **Application Details**).

3. Select the **Finance** tab.
4. Click the **Download Invoice** to download and print the Proforma invoice.




View Upcoming/Scheduled Reviews/Surveys

Scheduling Details:

The Scheduled Items panel on Home of the Dashboard provides a listing of all upcoming scheduled reviews. To view upcoming and scheduled reviews/surveys information

1. Click on the scheduled link. You will be directed to the Event Details page.
2. Details will include the Event Date, Event Coordinator, Location(s), Participants, Agenda(s).

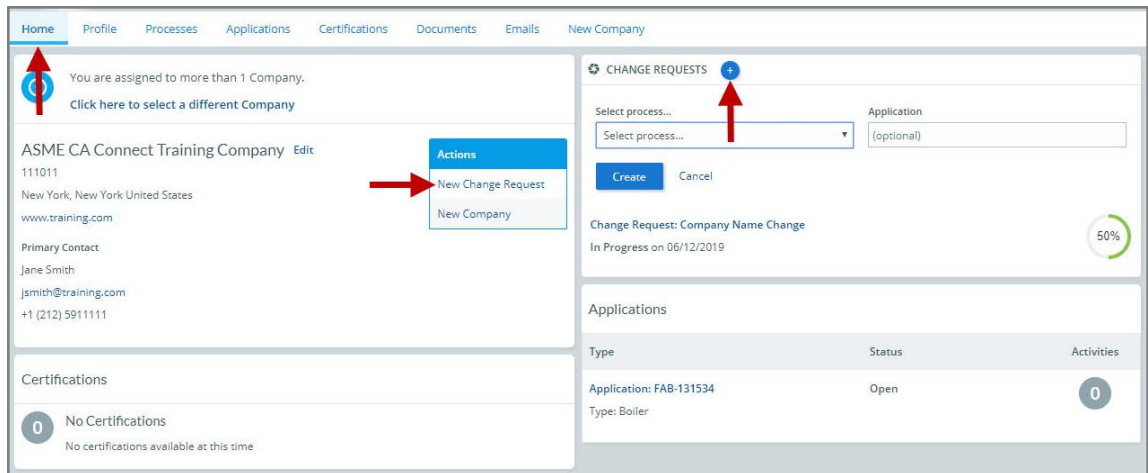
Scheduled Items			
Item		Begin	End
 Onsite Visit		Apr 17th	--
 Onsite Visit		May 13th	May 17th 13 days ago
 Onsite Visit		Apr 15th	--

Change Requests

To the right of the **Company Dashboard Home** page is a section for **Change Requests**. This is where you can apply for a change request.

To begin a new **Change Request**,

1. From the **Company Dashboard Home Page**, you can select either the **New Change Request** link displayed under the **Actions** box or the **Change Requests blue (+) circle icon** to submit a change request.



2. The following is a list of change requests you can apply. The steps and information required to complete the submission of any of the change requests is provided in this User Guide. To be directed to the details relating to a specific change request, click on the assigned link below.

- [Additional Building](#)
- [Additional Stamps](#)
- [AIA Change](#)
- [Cancellation](#)
- [Company Location Change](#)
- [Company Name and Location Change](#)
- [Company Name Change](#)
- [Contact Change](#)
- [Extension Request](#)
- [Financial Information Change](#)
- [Other Change Request](#)
- [Postal Re-Designation Change](#)
- [Scope Change](#)
- [Temporary Shop Request](#)

Additional Building

1. First click the **Change Request blue (+) icon**.
2. Under **Select Process**, click the **down arrow** icon to display a selection list for the change request.
3. Scroll through change request list and select **Addition Building**.

CHANGE REQUESTS +

Select process... Application

Select process... (optional)

Select process...

Additional Building

Additional Stamps

AIA Change

Cancellation

Company Location Change

4. Click **Create**.

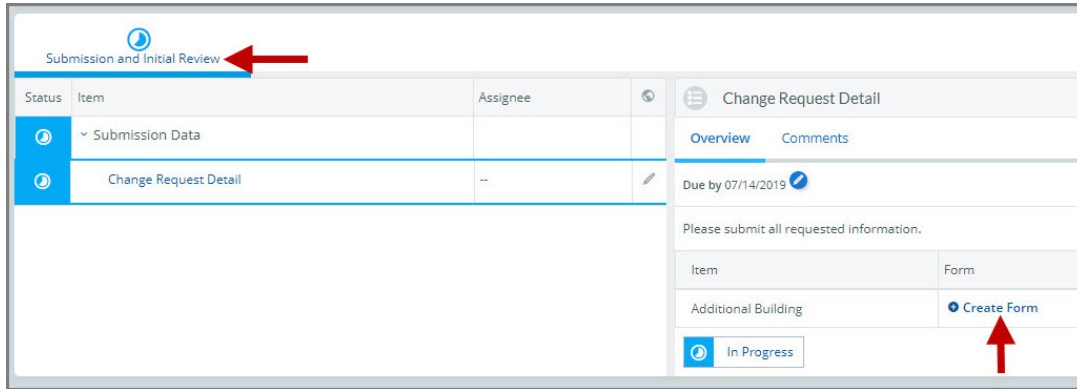
CHANGE REQUESTS +

Select process... Application

Additional Building (optional)

Create

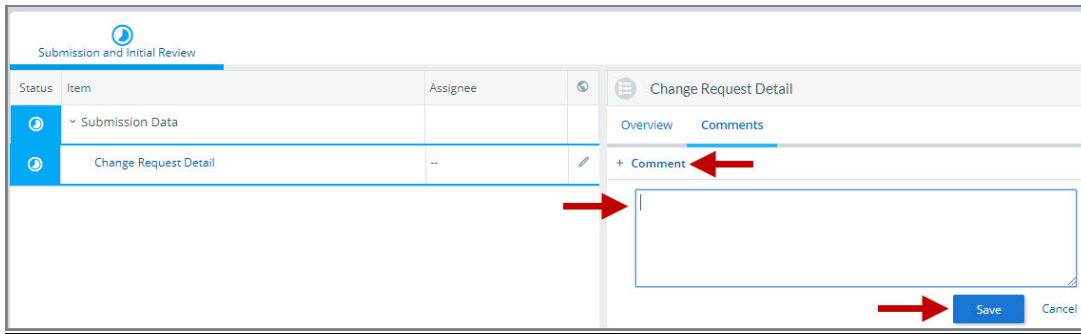
- The system will direct you to the **Processes** page. Under the **Submission and Initial Review** section of the page, select the **Create Form** link.



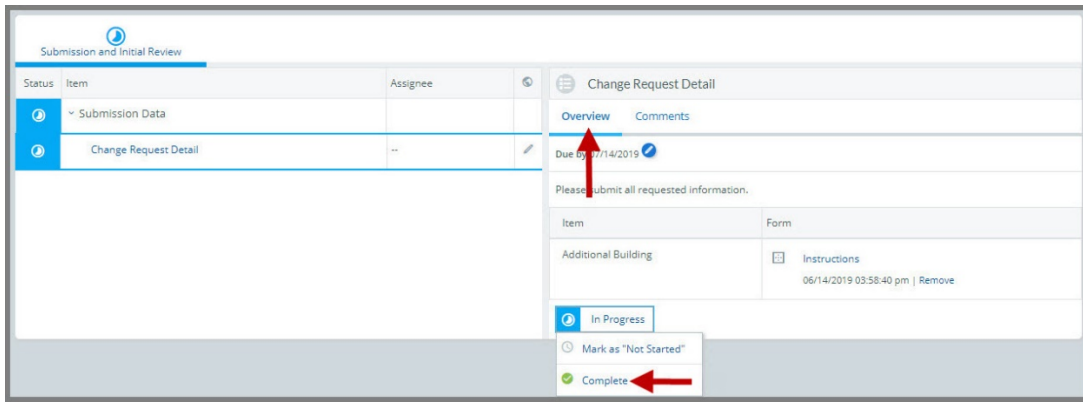
- A form is displayed for you to enter the details relating to the Additional Building change request you are applying for.
- Enter the information in the fields listed below.
- When done, click **Save** to continue.

The screenshot shows a 'Form' window with a blue header. It contains a rich text editor for 'Instructions' with various formatting options (B, I, U, S, x₂, x², T¹). To the right of the editor is a date picker field labeled 'Effective Date for requested changes'. Below the editor is a text input field labeled 'Applicable Certificate numbers'. At the bottom right, there are 'Save' and 'Cancel' buttons. Red arrows point to the date picker, the certificate numbers field, and the 'Save' button.

- You will be directed back to the previous page where the information you entered on the form is displayed.
- Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
 - Select the **Comments** link.
 - Click the **+Comment** link.
 - Enter the Comments in the text box provided.
 - When done, click **Save** to continue.



11. Initially the status of the change request will be **In Progress**. Once you complete entering all the required information for the change request,
 - a. Click the **In Process blue half-moon icon**.
 - b. Select **Complete**.



12. Once the change request is in progress, it will appear on the Change Requests section of the Dashboard Home Page. Your change request will be submitted to the ASME staff.

Additional Stamps

If your organization has been certified and received stamps for equipment, but needs more stamps for additional equipment, select the Additional Stamps change request process.

1. Click the **Change Request blue (+) icon**.
2. Under **Select Process**, click the **down arrow** icon to display a selection list for the change request.
3. Scroll through change request list and select **Addition Stamps**.

4. Click **Create**.

5. The system will direct you to the **Processes** page. Under the **Submission and Initial Review** section of the page, select the **Create Form** link.

6. A form is displayed for you to enter the details relating to the **Additional Stamps** change request you are applying for.
7. Enter the number of $\frac{3}{4}$ " and $\frac{1}{2}$ " stamps needed
8. Enter the Delivery Address for the stamps.
9. Review the **Acknowledgement** statement and select **Yes** to confirm you have read the statement.
10. Once complete, click **Save** to continue.

The screenshot shows a 'Form' window with the following sections:

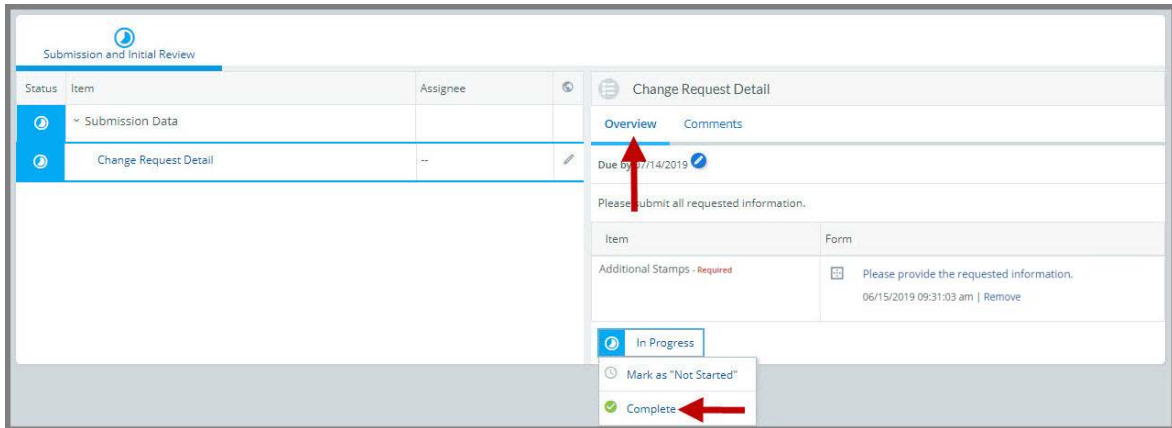
- Instructions:** A text box containing 'Please provide the requested information.'
- Stamp Quantities:** Two input fields. The first is labeled 'Please specify the quantity of 1/2" stamps requested:' and contains '0'. The second is labeled 'Please specify the quantity of 3/4" stamps requested:' and also contains '0'.
- Delivery Address:** A rich text editor with formatting options (B, I, U, S, x₂, x², T) and a 'Start Typing' button.
- Acknowledgement:** Radio buttons for 'Yes' and 'No'.
- AcknowledgementStatement:** Another rich text editor with the text 'I understand and acknowledge that the company'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

Red arrows point to the '0' in both stamp quantity fields, the 'Start Typing' button, the 'No' radio button, and the 'Save' button.

11. You will be directed back to the previous page where the information you entered on the form is displayed.
12. **Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
 - a. Select the **Comments** link.
 - b. Click the **+Comment** link.
 - c. Enter the Comments in the text box provided.
 - d. When done, click **Save** to continue.

The screenshot shows a 'Submission and Initial Review' page. It features a table with the following columns: Status, Item, Assignee, and an action column. The table has two rows: 'Submission Data' and 'Change Request Detail'. To the right of the table is a sidebar for 'Change Request Detail' with tabs for 'Overview' and 'Comments'. In the 'Comments' tab, there is a '+ Comment' link and a text input area. At the bottom right of the sidebar, there are 'Save' and 'Cancel' buttons. Red arrows point to the '+ Comment' link, the text input area, and the 'Save' button.

13. Initially the status of the change request will be **In Progress**. Once you complete entering all the required information for the change request,
 - a. Click the **In Process blue half-moon icon**.
 - b. Select **Complete**.

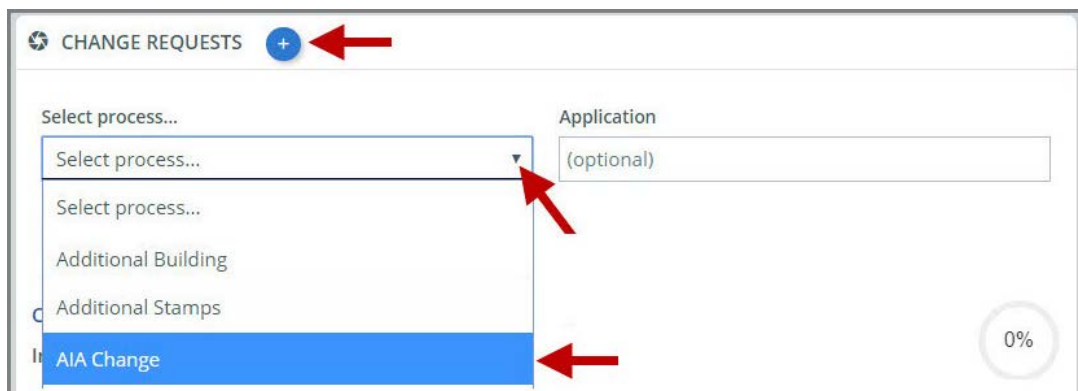


14. Once the change request is in progress, it will appear on the Change Requests section of the Dashboard Home Page. Your change request will be submitted to the ASME staff.

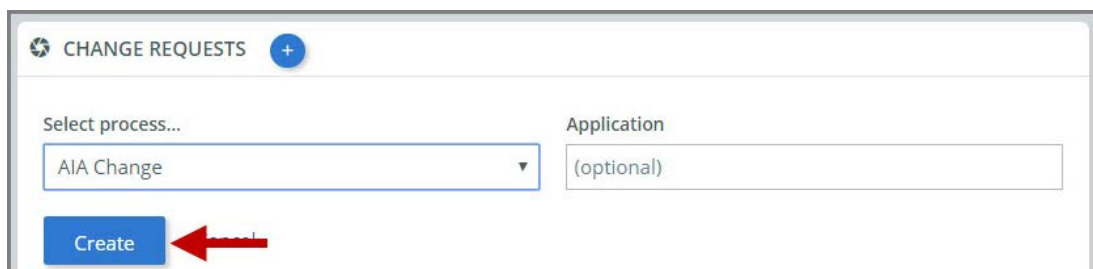
AIA Change

To change the AIA assigned to your organization,

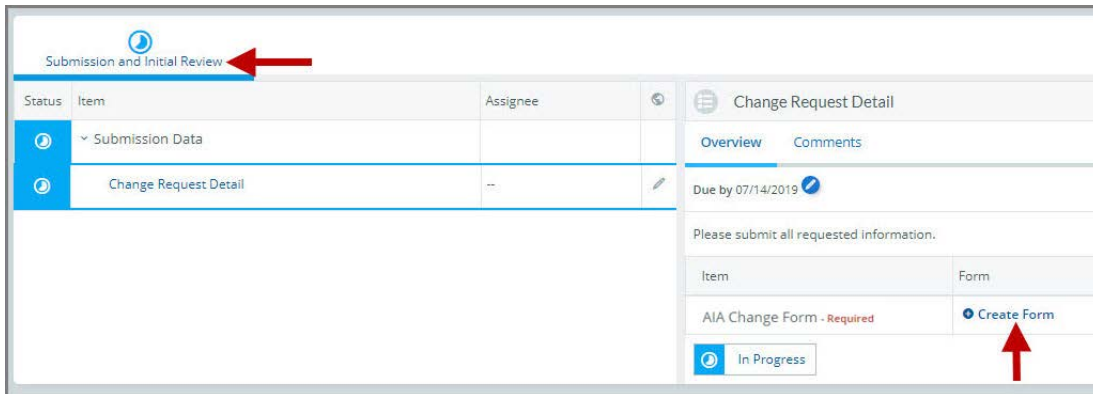
1. Click the **Change Request blue (+) icon**.
2. Under **Select Process**, click the **down arrow** icon to display a selection list for the change request.
3. Scroll through change request list and select **AIA Change**.



4. Click **Create**.

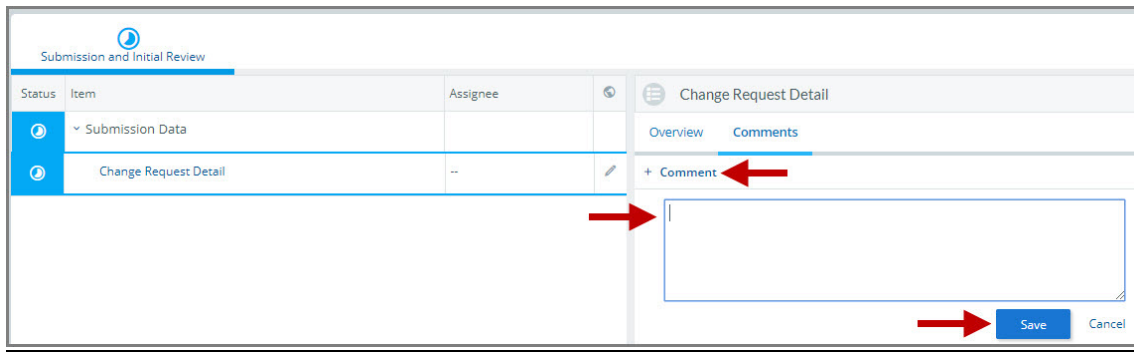


5. The system will direct you to the **Processes** page. Under the Submission and Initial Review section of the page, select the Create Form link.

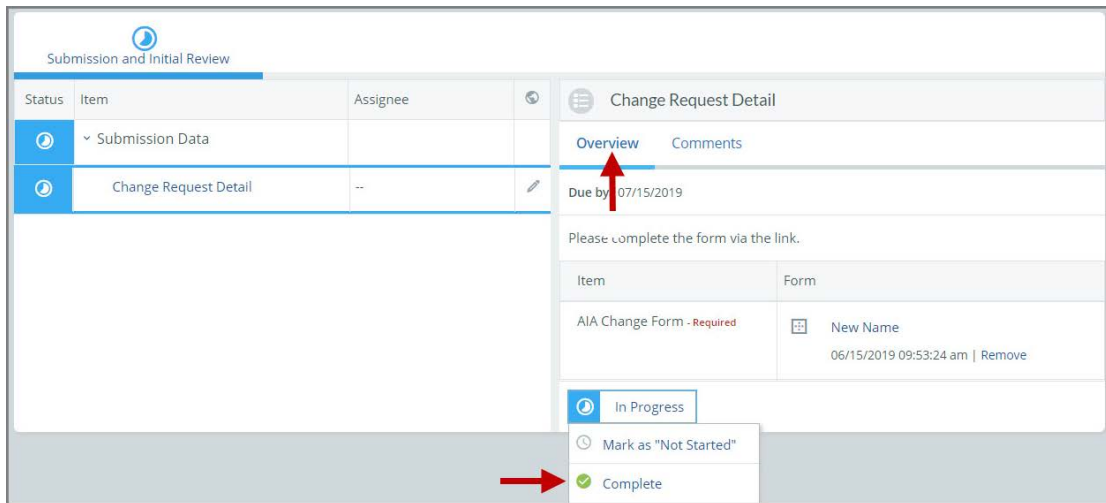


6. A form is displayed for you to enter the details relating to the **AIA change** request you are applying for.
- Enter the name of the new AIA
 - Enter the Effective Date of the requested change
 - When done, click **Save** to continue.

7. You will be directed back to the previous page where the information you entered on the form is displayed.
8. **Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
- a. Select the **Comments** link.
 - b. Click the **+Comment** link.
 - c. Enter the Comments in the text box provided.
 - d. When done, click **Save** to continue.



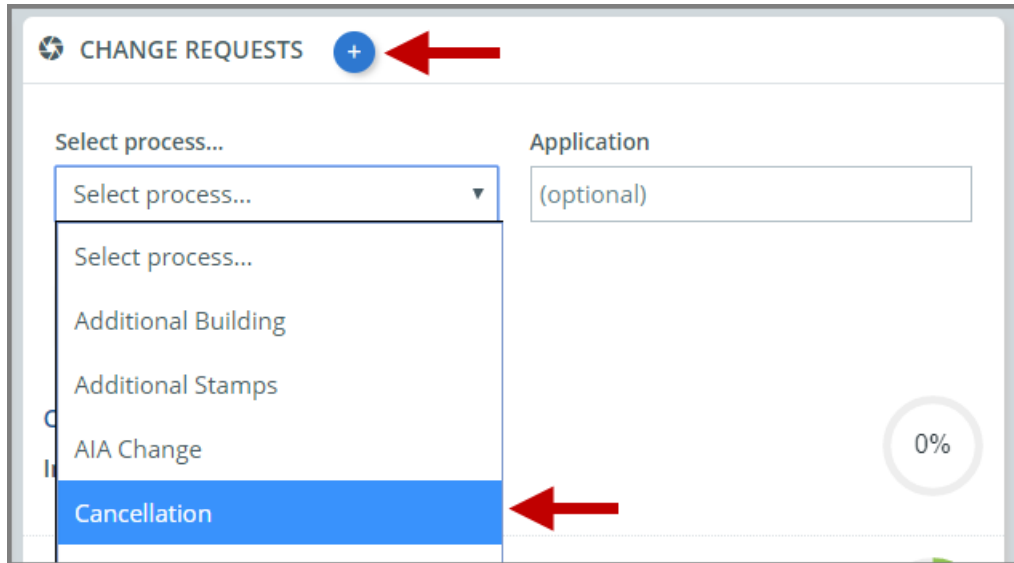
9. Initially the status of the change request will be **In Progress**. Once you complete entering all the required information for the change request,
 - a. Click the **In Process blue half-moon icon**.
 - b. Select **Complete**.



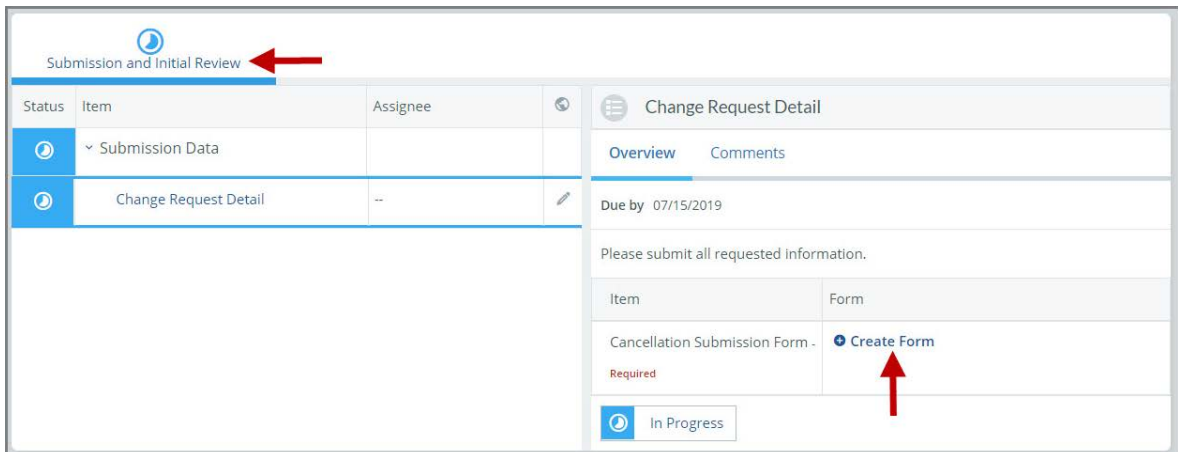
Cancellation

To cancel a scheduled review, select the Cancellation change request process.

1. Click the **Change Request blue (+) icon**.
2. Under **Select Process**, click the **down arrow** icon to display a selection list for the change request.
3. Scroll through change request list and select **Cancellation**.



4. Click **Create**.
5. The system will direct you to the **Processes** page. Under the **Submission and Initial Review** section of the page, select the **Create Form** link.



6. A form is displayed for you to enter the details relating to the Cancellation change request you are applying for. Whether the change request is for a cancellation or to reschedule for a later date
 - Whether the request is for cancellation or rescheduling to a later date (postponement)
 - If postponement, enter the requested **Start date**
 - If postponement, enter the requested **End date**
 - Enter the **Start date** of currently scheduled review
 - Enter the **Reason** for cancellation or postponement
 - Confirm **Acknowledgement** of cancellation fee policy
7. When done, click **Save** to continue.

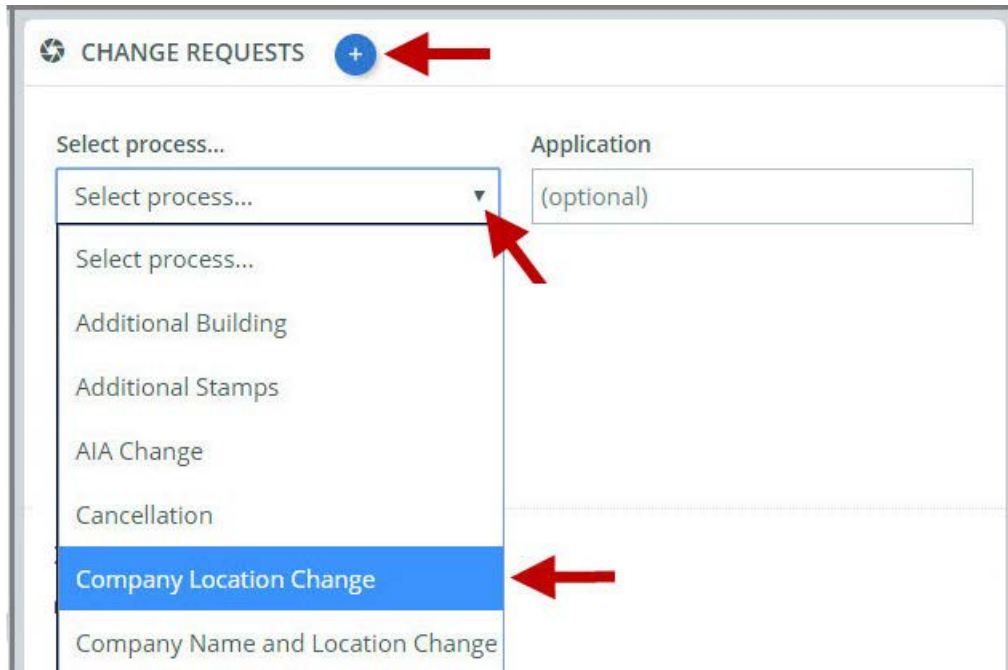
8. You will be directed back to the previous page where the information you entered on the form is displayed.
9. **Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
 - a. Select the **Comments** link.
 - b. Click the **+Comment** link.
 - c. Enter the Comments in the text box provided.
 - d. When done, click **Save** to continue.

10. Initially the status of the change request will be **In Progress**. Once you complete entering all the required information for the change request,
 - Click the **In Process blue half-moon icon**.
 - Select **Complete**.

Company Location Change

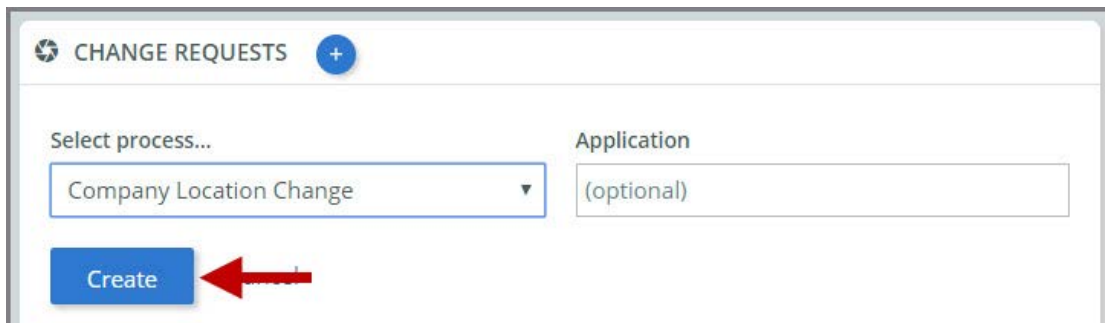
If the location for your organization changes, select the Company Location change request process.

1. Click the **Change Request blue (+) icon**.
2. Under **Select Process**, click the **down arrow** icon to display a selection list for the change request.
3. Scroll through change request list and select **Company Location Change**.



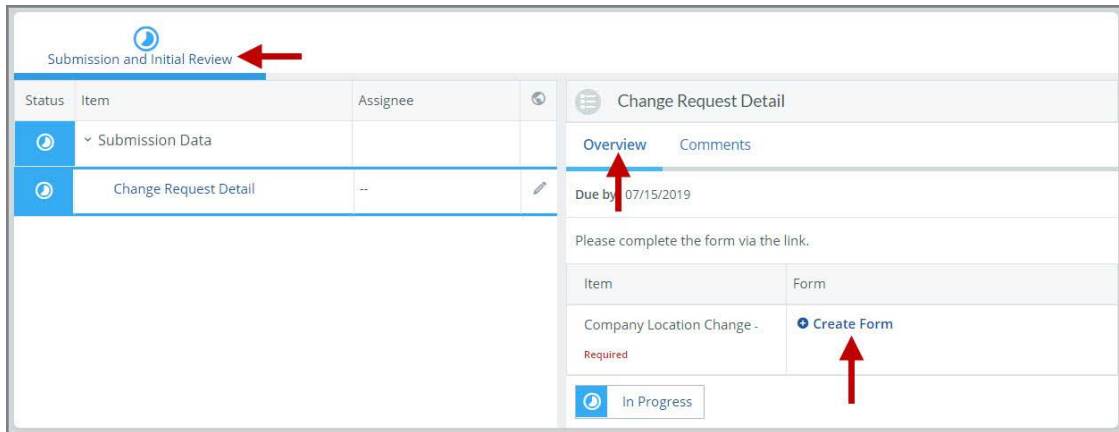
The screenshot shows the 'CHANGE REQUESTS' header with a blue plus icon. Below it, there are two input fields: 'Select process...' and 'Application (optional)'. The 'Select process...' dropdown menu is open, displaying a list of options: 'Select process...', 'Additional Building', 'Additional Stamps', 'AIA Change', 'Cancellation', 'Company Location Change' (highlighted in blue), and 'Company Name and Location Change'. Red arrows point to the plus icon, the dropdown arrow, and the highlighted 'Company Location Change' option.

4. Click **Create**.



The screenshot shows the 'CHANGE REQUESTS' header with a blue plus icon. Below it, the 'Select process...' dropdown menu is now closed and displays 'Company Location Change'. The 'Application (optional)' field is empty. A blue 'Create' button is located below the input fields. A red arrow points to the 'Create' button.

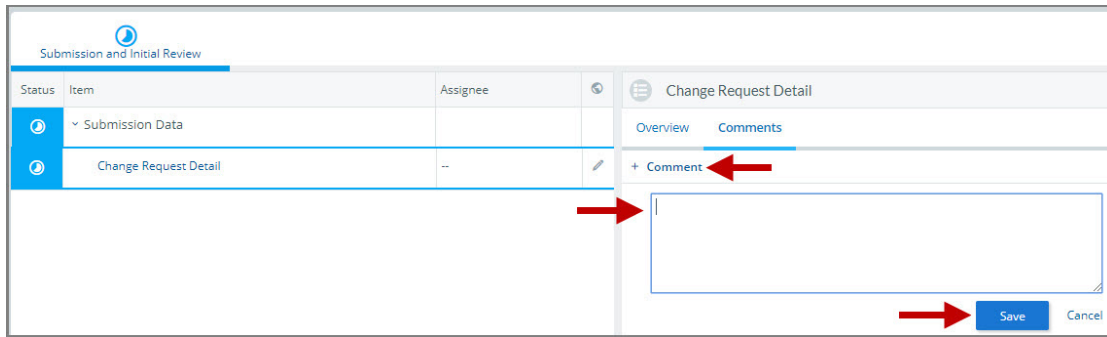
5. The system will direct you to the **Processes** page. Under the **Submission and Initial Review** section of the page, select the **Create Form** link.



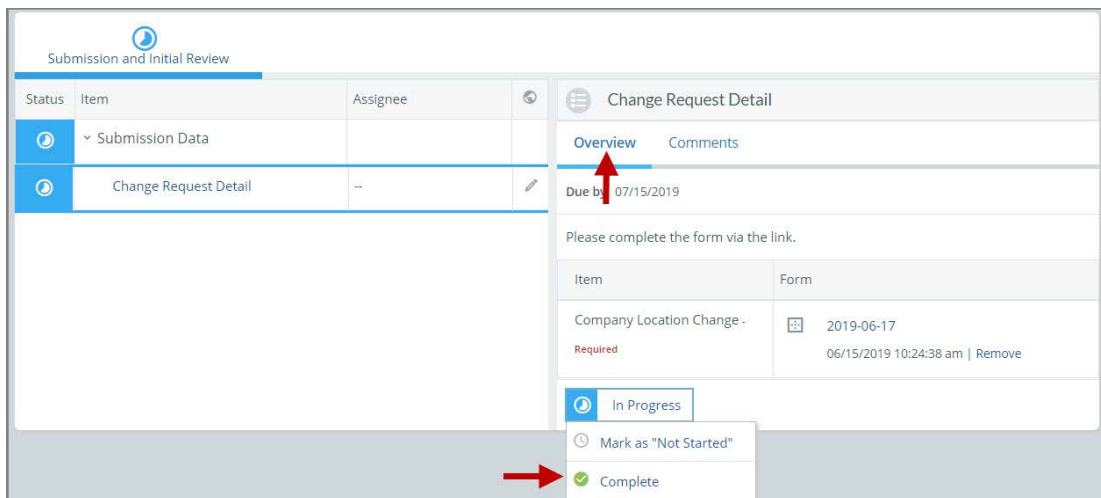
6. A form is displayed for you to enter the details relating to the Company Location Change request you are applying for.
 - Enter the **Effective Date** of the requested change.
 - Enter the **distance** from the old address.
 - Enter the **new address**.
7. When done, click **Save** to continue.

8. You will be directed back to the previous page where the information you entered on the form is displayed.
9. **Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
 - a. Select the **Comments** link.

- b. Click the **+Comment** link.
- c. Enter the Comments in the text box provided.
- d. When done, click **Save** to continue.



10. Initially the status of the change request will be **In Progress**. Once you complete entering all the required information for the change request,
 - a. Click the **In Process blue half-moon icon**.
 - b. Select **Complete**.



Company Name and Location Change

If the name and location of your organization changes, select the **Company Name and Location Change** request process.

1. Click the **Change Request blue (+) icon**.
2. Under **Select Process**, click the **down arrow** icon to display a selection list for the change request.
3. Scroll through change request list and select **Company Name and Location Change**.

CHANGE REQUESTS +

Select process... Application

Select process... (optional)

Additional Building

Additional Stamps

AIA Change

Cancellation

Company Location Change

Company Name and Location Change

Company Name Change

4. Click **Create**.

CHANGE REQUESTS +

Select process... Application

Company Name and Location Change (optional)

Create

5. The system will direct you to the **Processes** page. Under the **Submission and Initial Review** section of the page, select the **Create Form** link.

Submission and Initial Review

Status	Item	Assignee
🕒	▼ Submission Data	
🕒	Change Request Detail	--

Change Request Detail

Overview Comments

Due by 07/15/2019

Please complete the form via the link.

Item	Form
Company Name and Location Change - Required	Create Form

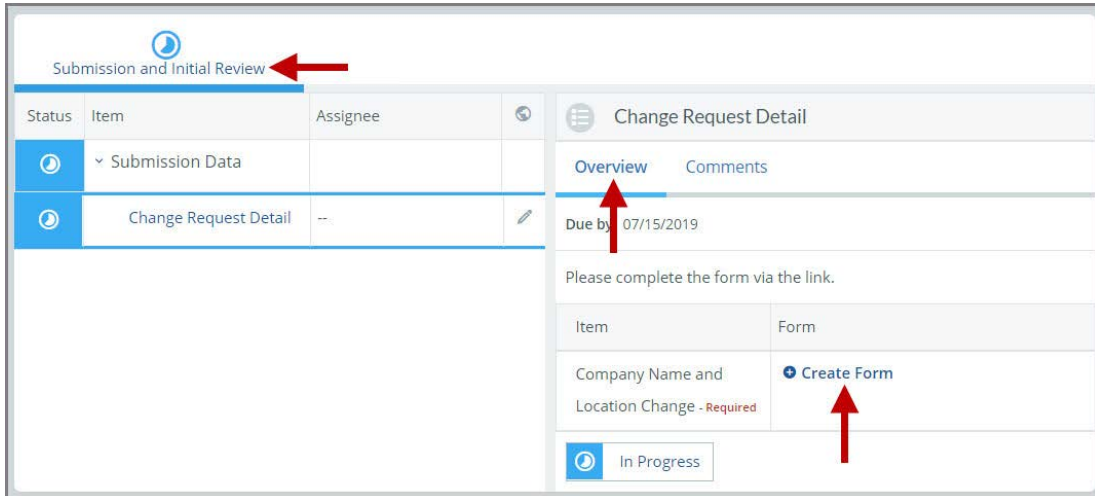
In Progress

6. A form is displayed for you to enter the details relating to the change request you are applying for. Enter the following information:

- a. Effective date of the Requested Change
 - b. New Legal Company Name
 - c. Distance from the old address and the new address (in miles)
 - d. New Address
7. When done, click **Save** to continue.

8. You will be directed back to the previous page where the information you entered on the form is displayed.
9. **Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
 - a. Select the **Comments** link.
 - b. Click the **+Comment** link.
 - c. Enter the Comments in the text box provided.
 - d. When done, click **Save** to continue.

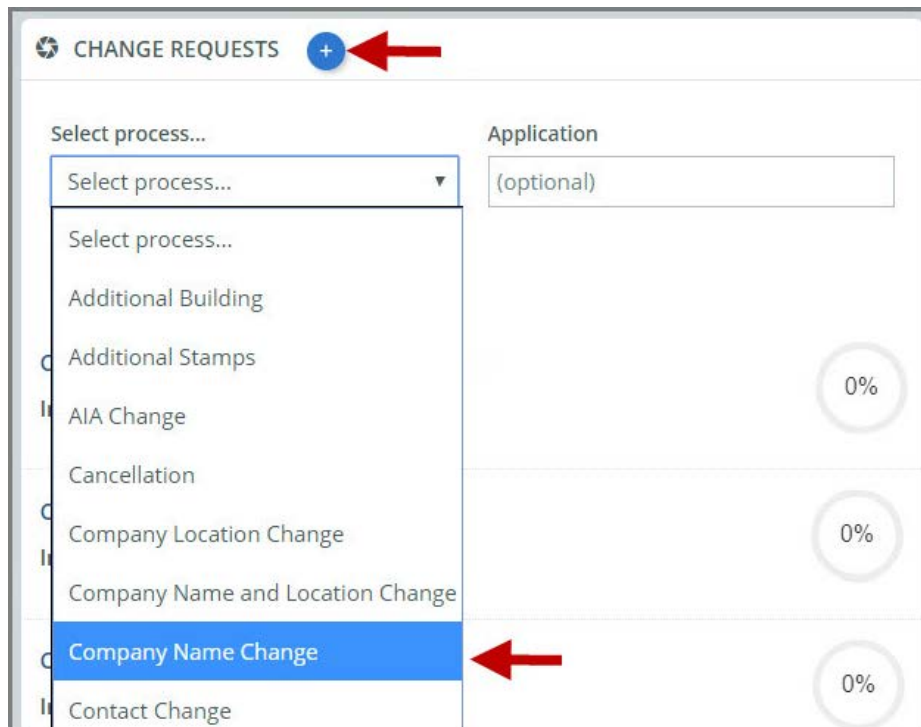
10. Initially the status of the change request will be **In Progress**. Once you complete entering all the required information for the change request,
 - a. Click the **In Process blue half-moon icon**.
 - b. Select **Complete**.



Company Name Change

If the name of your organization changes, select the **Company Name Change** request process.

1. Click the **Change Request blue (+) icon**.
2. Under **Select Process**, click the **down arrow** icon to display a selection list for the change request.
3. Scroll through change request list and select **Company Name Change**.



4. Click **Create**.

CHANGE REQUESTS +

Select process...
Company Name Change

Application
(optional)

Create

5. The system will direct you to the **Processes** page. Under the **Submission and Initial Review** section of the page, select the **Create Form** link.

Submission and Initial Review

Status	Item	Assignee
	Submission Data	
	Change Request Detail	--

Change Request Detail

Overview Comments

Due by: 07/15/2019

Please complete the form via the link.

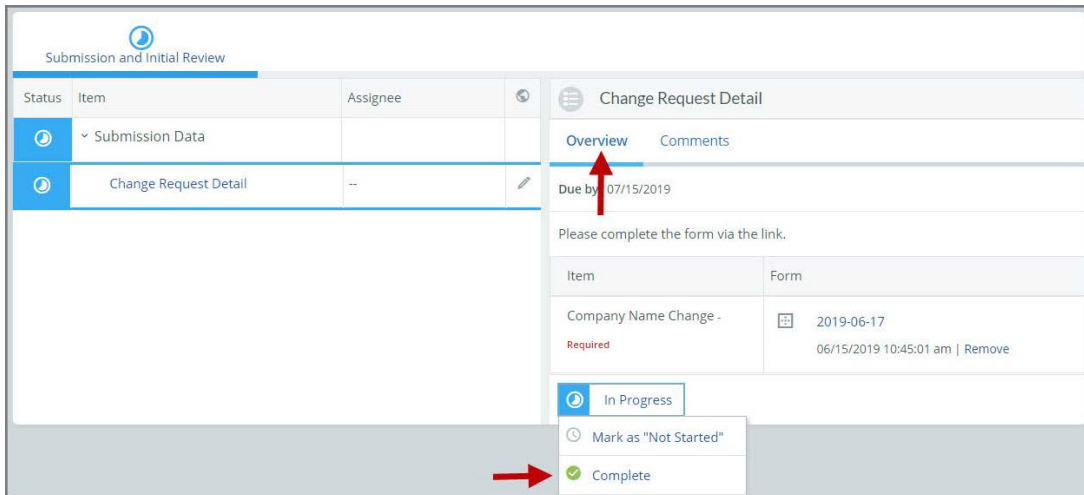
Item	Form
Company Name Change -	Create Form

In Progress

6. A form is displayed for you to enter the details relating to the change request you are applying for.
 - Enter the **Effective Date of Requested Change**.
 - Enter the **New Legal Company Name**.
 - **Acknowledge** that you have read the Name Change Policy. **(MISSING FIELDS)**
 - When done, click **Save** to continue.

7. You will be directed back to the previous page where the information you entered on the form is displayed.
8. **Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
 - a. Select the **Comments** link.
 - b. Click the **+Comment** link.
 - c. Enter the Comments in the text box provided.
 - d. When done, click **Save** to continue.

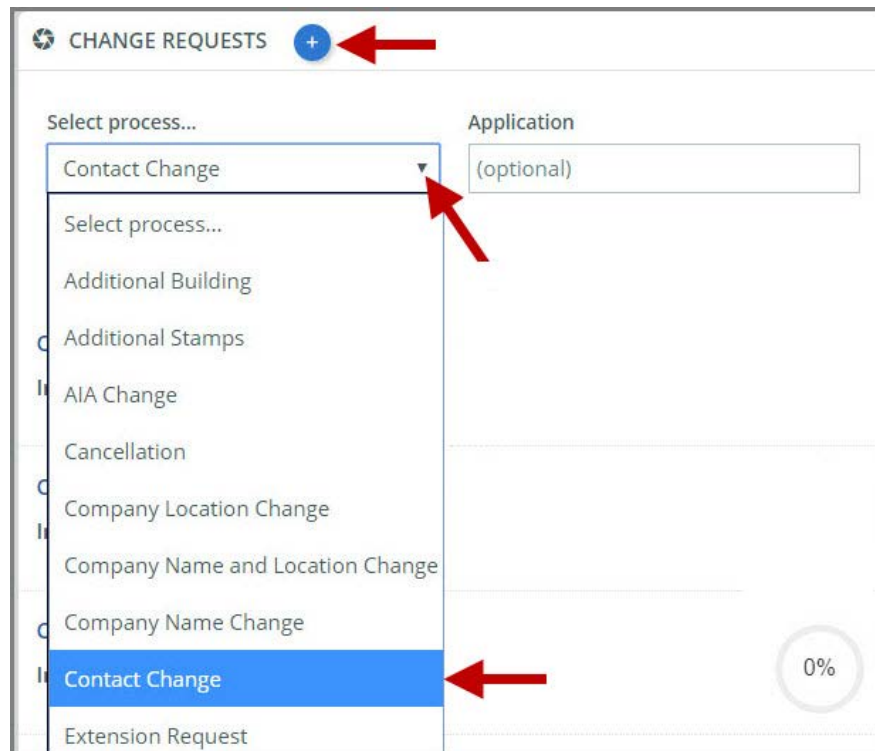
9. Initially the status of the change request will be **In Progress**. Once you complete entering all the required information for the change request,
 - a. Click the **In Process blue half-moon icon**.
 - b. Select **Complete**.



Contact Change

If the information for one of the Primary Company Contact and/or Trusted Contacts changes, select the Contact Change request process.

1. Click the **Change Request blue (+) icon**.
2. Under **Select Process**, click the **down arrow** icon to display a selection list for the change request.
3. Scroll through change request list and select **Contact Change**.



4. Click **Create**.

CHANGE REQUESTS +

Select process...
Contact Change ▼

Application
(optional)

Create ←

- The system will direct you to the **Processes** page. Under the **Submission and Initial Review** section of the page, select the **Create Form** link.

Submission and Order Creation

Status	Item	Assignee
▼	Submission Data	
⌚	Change Request Detail	--

Change Request Detail

Overview Comments

Due by 07/15/2019

Please submit all requested information.

Item	Form
Contact Information Change - Required	Please provide the relevant information for the contact information which needs updating. 06/15/2019 11:11:56 am Remove

In Progress

Mark as "Not Started"

Complete →

- A form is displayed for you to enter the details relating to the change request you are applying for. Enter and select the following information
 - Effective Date
 - First and Last Name of Existing Contact
 - Does contact name need update? (select Yes or No)
 - Does contact email address need update? (select Yes or No)
 - Does a contact phone need update? (Yes or No)
 - Updated First and Last Name (if applicable)
 - Updated Email Address (if applicable)
 - Updated Business Phone, including country and area codes (if applicable)
 - Updated Fax Number, including country and area codes (if applicable)
 - Updated Mobile Phone, including country and area codes (if applicable)
- When done, click **Save** to continue.

Form

Instructions: Please provide the relevant information for the cont

Effective Date: [Calendar icon] ←

Master Customer ID (optional): [Text box]

First and Last Name of Existing Contact: [Text box] ←

Does contact name need update? Yes No ←

Does contact email address need update? Yes No ←

Does a contact phone need update? Yes No ←

Updated First and Last Name (if applicable): [Text box] ←

Updated Email Address (if applicable): [Text box] ←

Updated BUSINESS phone (including country and area codes) (if applicable): [Text box] ←

Updated FAX number (including country and area codes) Updated MOBILE phone (including country and area codes)

[Save] [Cancel]

8. You will be directed back to the previous page where the information you entered on the form is displayed.
9. **Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
 - a. Select the **Comments** link.
 - b. Click the **+Comment** link.
 - c. Enter the Comments in the text box provided.
 - d. When done, click **Save** to continue.

Submission and Initial Review

Status	Item	Assignee
ⓘ	Submission Data	
ⓘ	Change Request Detail	--

Change Request Detail

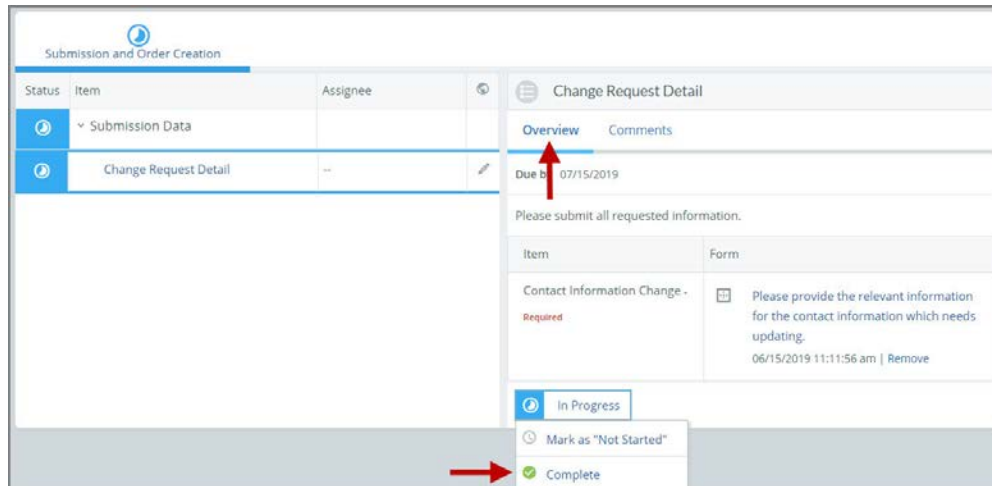
Overview | **Comments**

+ Comment ←

[Text Input Box]

[Save] [Cancel]

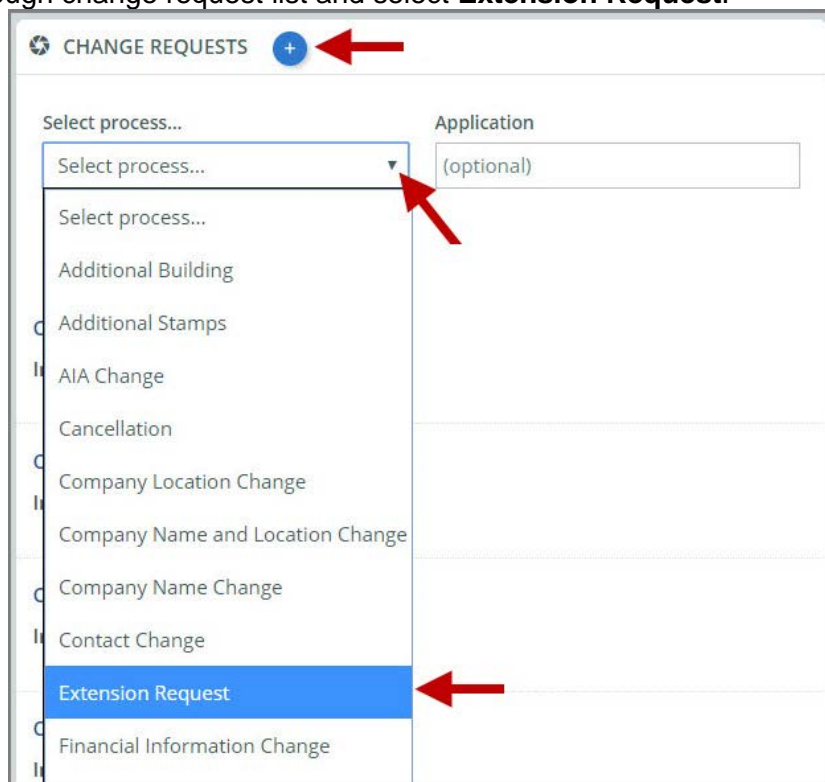
10. Initially the status of the change request will be **In Progress**. Once you complete entering all the required information for the change request,
 - a. Click the **In Process blue half-moon icon**.
 - b. Select **Complete**.



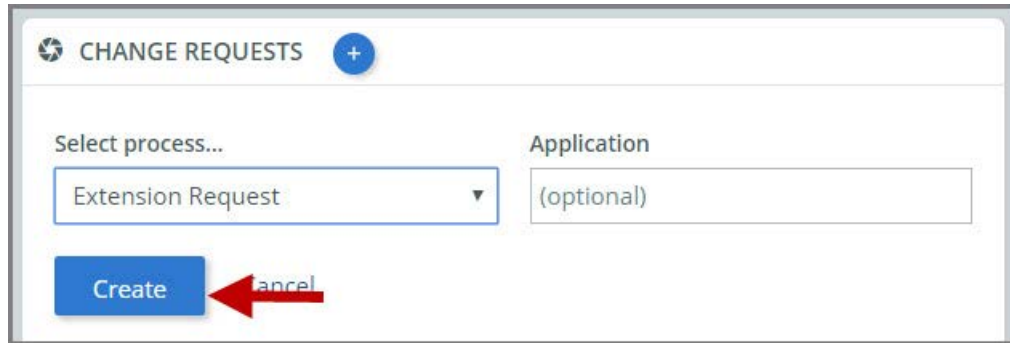
Extension Request

If an extension is required for a certificate renewal or work in progress, select the Extension Request Change request process.

1. Click the **Change Request blue (+) icon**.
2. Under **Select Process**, click the **down arrow** icon to display a selection list for the change request.
3. Scroll through change request list and select **Extension Request**.



4. Click **Create**.



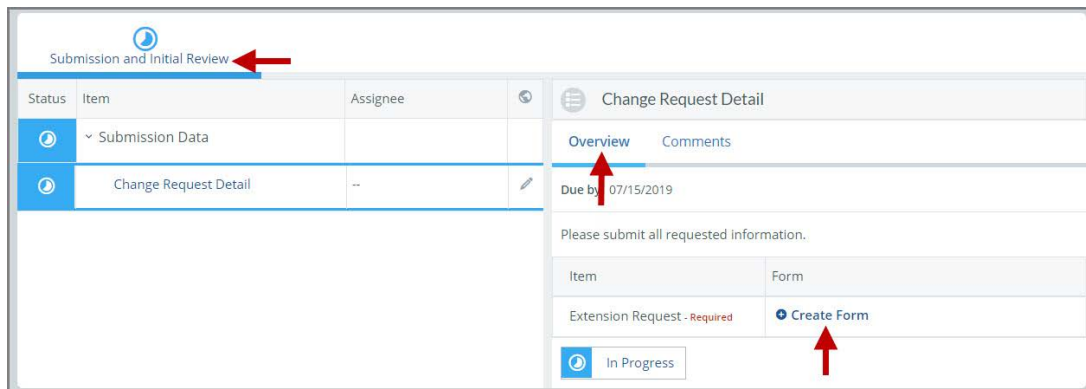
CHANGE REQUESTS +

Select process...
Extension Request

Application
(optional)

Create Cancel

5. The system will direct you to the **Processes** page. Under the **Submission and Initial Review** section of the page, select the **Create Form** link.



Submission and Initial Review

Status	Item	Assignee	
	Submission Data		
	Change Request Detail	--	

Change Request Detail

Overview Comments

Due by 07/15/2019

Please submit all requested information.

Item	Form
Extension Request - Required	Create Form

In Progress

6. A form is displayed for you to enter the details relating to the change request you are applying for. Enter the following information,
- Extension Type (Intended Renewal or Work in Progress)
 - Applicable Certificate Number(s)
 - Reason for needing an extension
 - Requested extension date
7. When done, click **Save** to continue.

Form

Instructions

Do you intend to renew the certification for the certi

Extension Type

Applicable Certificate Number(s)

What is the requested extension date (for renewals) or the estimated completion date of code activity (for WIP non-renewal extension)?

Please describe the reason for needing an extension (late renewal, works in progress, etc.). Provide sufficient detail to support granting of an extension.

B I U S x₂ x² T |

Start Typing

Save Cancel

8. You will be directed back to the previous page where the information you entered on the form is displayed.
9. **Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
 - a. Select the **Comments** link.
 - b. Click the **+Comment** link.
 - c. Enter the Comments in the text box provided.
 - d. When done, click **Save** to continue.

Submission and Initial Review

Status	Item	Assignee
	~ Submission Data	
	Change Request Detail	--

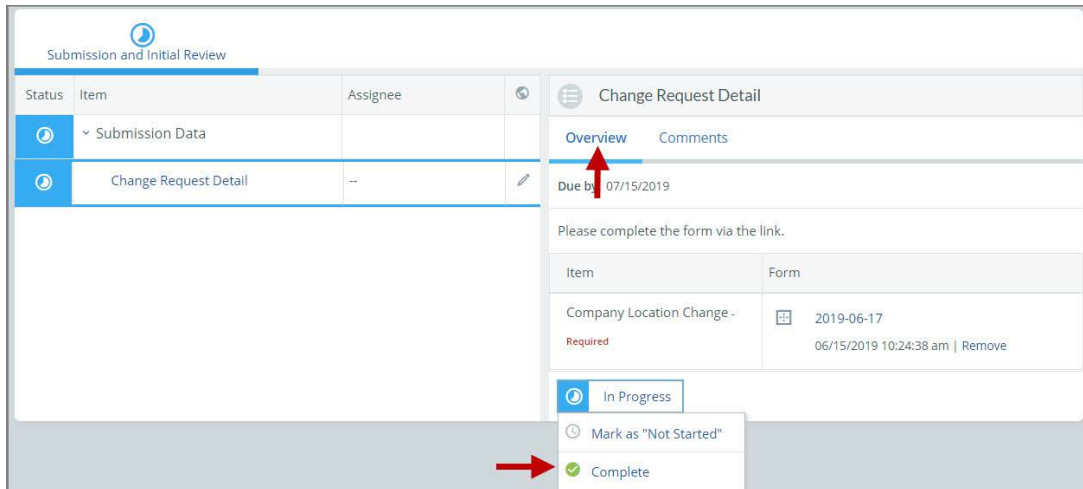
Change Request Detail

Overview Comments

+ Comment

Save Cancel

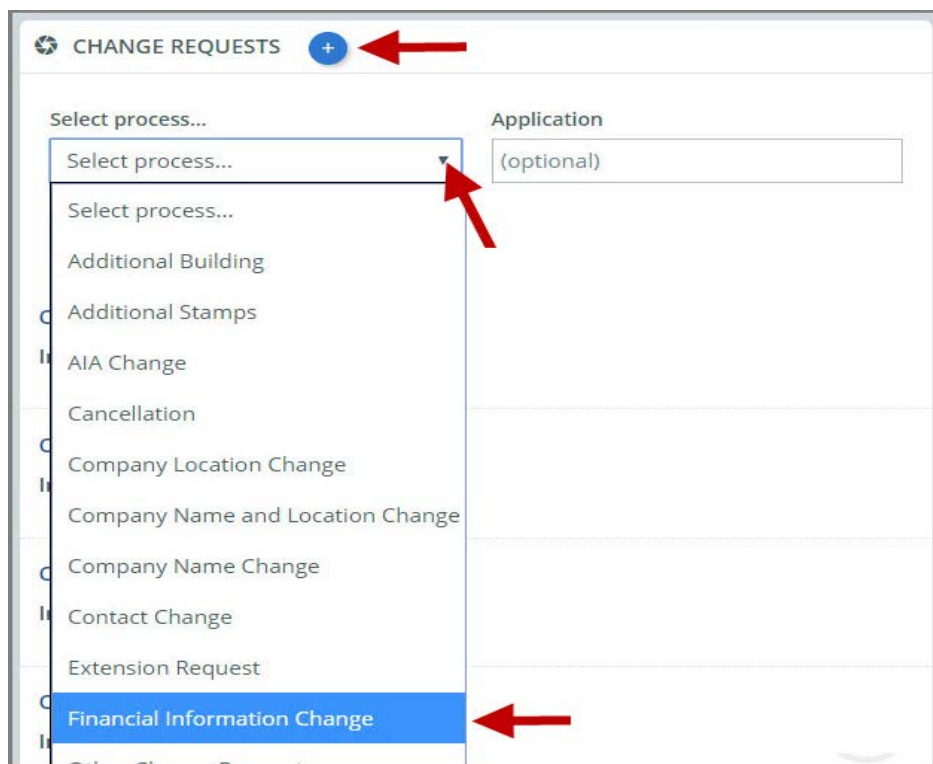
10. Initially the status of the change request will be **In Progress**. Once you complete entering all the required information for the change request,
 - a. Click the **In Process blue half-moon icon**.
 - b. Select **Complete**.



Financial Information Change

If the banking information for an organization needs to change, select the **Financial Information Change** request process.

1. Click the **Change Request blue (+) icon**.
2. Under **Select Process**, click the **down arrow** icon to display a selection list for the change request.
3. Scroll through change request list and select **Financial Information Change**.



4. Click **Create**.

CHANGE REQUESTS +

Select process...
Financial Information Change

Application
(optional)

Create

- The system will direct you to the **Processes** page. Under the **Submission and Initial Review** section of the page, select the **Create Form** link.

Submission and Initial Review

Status	Item	Assignee
	Submission Data	
	Change Request Detail	--

Change Request Detail

Overview Comments

Due by 07/15/2019

Please submit all requested information.

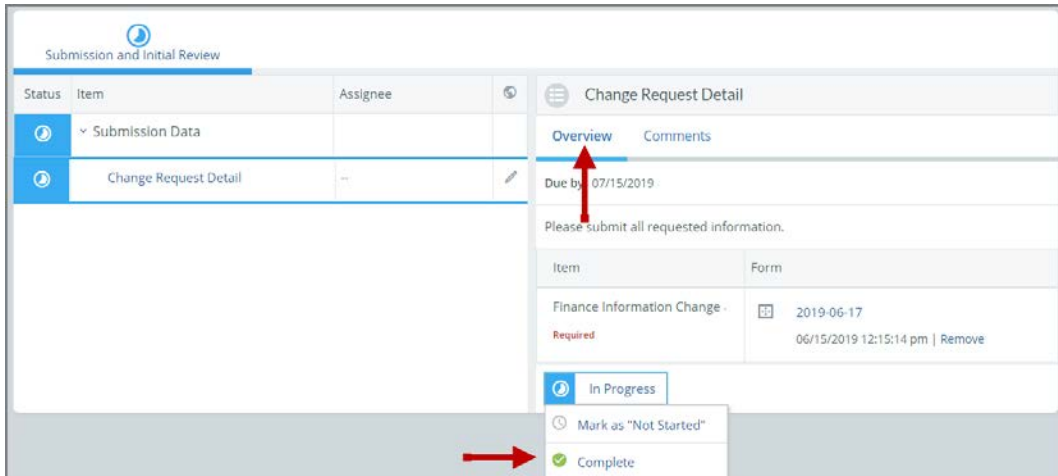
Item	Form
Finance Information Change - Required	+ Create Form

In Progress

- A form is displayed for you to enter the details relating to the change request you are applying for. Enter the following information:
 - Effective Date of Requested Changes
 - Name of Bank
 - Account Name / Beneficiary
 - Account Number
 - SWIFT (BIC) Code
 - Routing Number (if applicable)
 - IBAN (if applicable)
 - Comments (optional)
- When done, click **Save** to continue.

8. You will be directed back to the previous page where the information you entered on the form is displayed.
9. **Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
 - a. Select the **Comments** link.
 - b. Click the **+Comment** link.
 - c. Enter the Comments in the text box provided.
 - d. When done, click **Save** to continue.

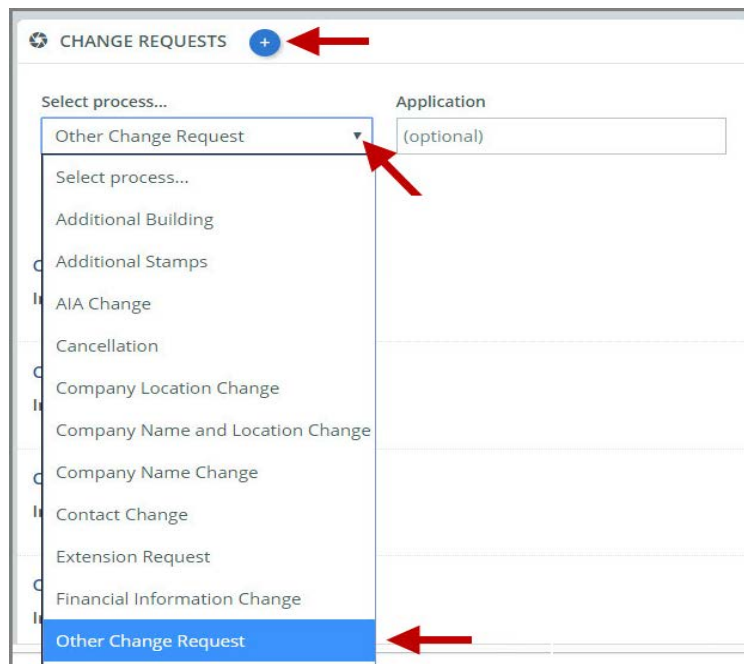
10. Initially the status of the change request will be **In Progress**. Once you complete entering all the required information for the change request,
 - a. Click the **In Process blue half-moon icon**.
 - b. Select **Complete**.



Other Change Request

If an organization needs to request a change to their account, certificate or application that is not included in one of the pre-defined change request processes, select the **Other Change Request** process option.

1. Click the **Change Request blue (+) icon**.
2. Under **Select Process**, click the **down arrow** icon to display a selection list for the change request.
3. Scroll through change request list and select **Other Change Request**.



4. Click **Create**.

CHANGE REQUESTS +

Select process... Other Change Request

Application (optional)

Create

5. The system will direct you to the **Processes** page. Under the **Submission and Initial Review** section of the page, select the **Create Form** link.

Submission and Initial Review

Status	Item	Assignee
	Submission Data	
	Change Request Detail	--

Change Request Detail

Overview Comments

Due by 07/15/2019

Please submit all requested information.

Item	Form
Other Change Request - Required	Create Form

In Progress

6. A form is displayed for you to enter the details relating to the change request you are applying for. Enter the following information:
- Effective Date of Requested Change
 - Application and/or Certificate Number
 - Details about the change request
7. When done, click **Save** to continue.

Form

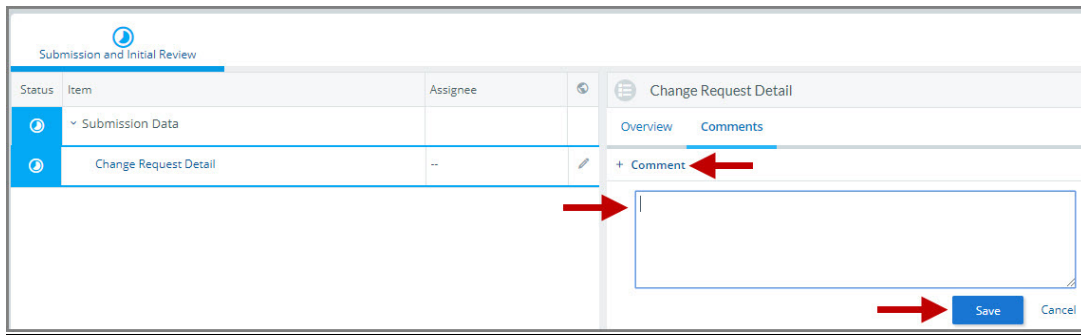
Effective Date of Requested Change Application and/or Certificate Number(s)

Please describe your request. Provide enough detail to allow ASME staff to process your request.

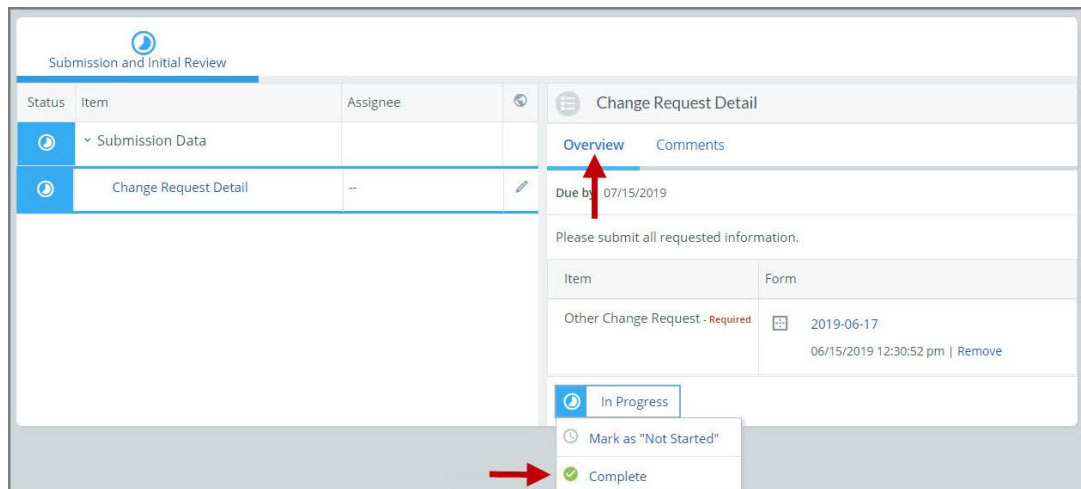
Start Typing

Save Cancel

8. You will be directed back to the previous page where the information you entered on the form is displayed.
9. **Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
 - a. Select the **Comments** link.
 - b. Click the **+Comment** link.
 - c. Enter the Comments in the text box provided.
 - d. When done, click **Save** to continue.



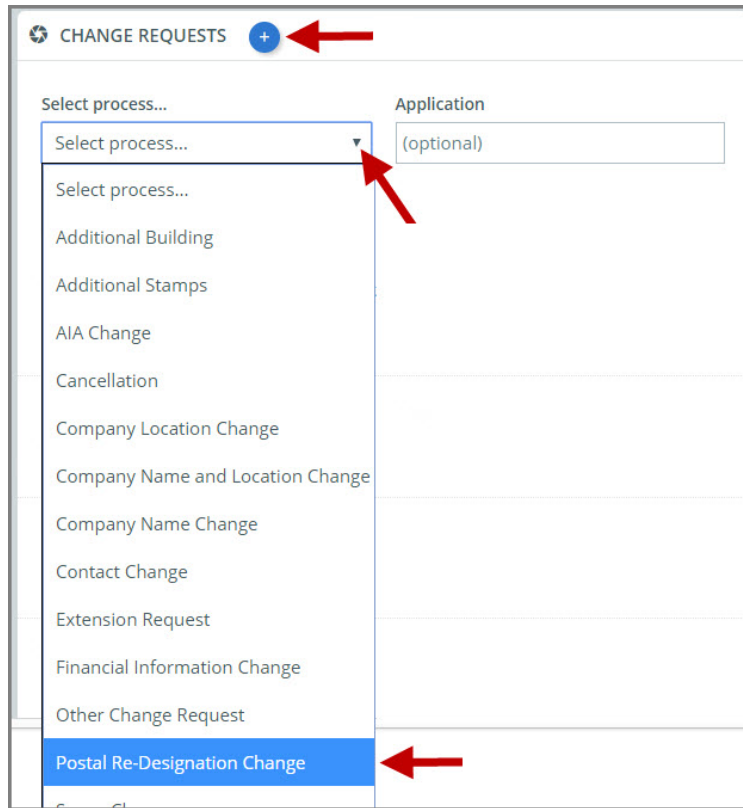
10. Initially the status of the change request will be **In Progress**. Once you complete entering all the required information for the change request,
 - a. Click the **In Process blue half-moon icon**.
 - b. Select **Complete**.



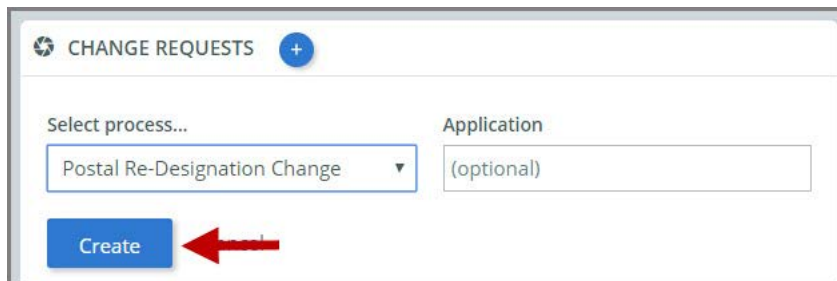
Postal Re-Designation Change

If an organization's address changes due to postal re-designation, and not due to a physical location move, select the **Postal Re-Designation Change** request process.

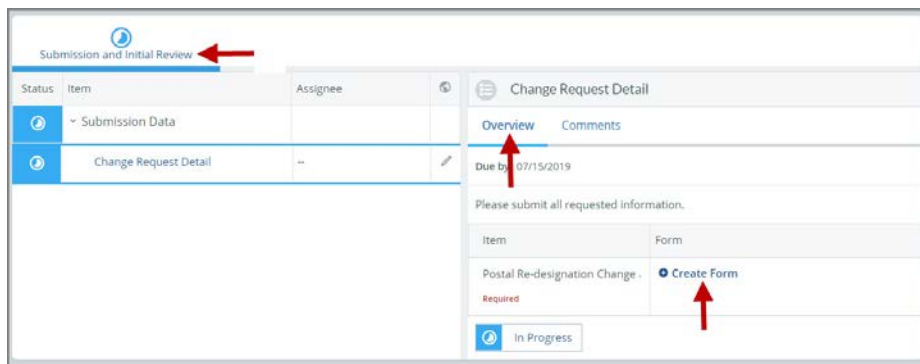
1. Click the **Change Request blue (+) icon**.
2. Under **Select Process**, click the **down arrow** icon to display a selection list for the change request.
3. Scroll through change request list and select **Postal Re-Designation Change**.



4. Click **Create**.



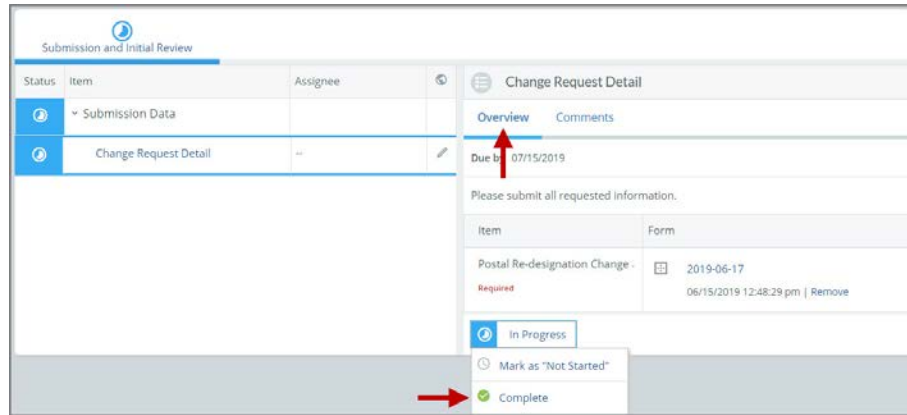
5. The system will direct you to the **Processes** page. Under the **Submission and Initial Review** section of the page, select the **Create Form** link.



6. A form is displayed for you to enter the details relating to the change request you are applying for.
 - Effective Date of Requested Changes
 - Confirmation statement that address change is postal only, and the location has not moved or changed (yes or no)
 - New Address
 - Reason for Postal Change
7. When done, click **Save** to continue.

8. You will be directed back to the previous page where the information you entered on the form is displayed.
9. **Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
 - a. Select the **Comments** link.
 - b. Click the **+Comment** link.
 - c. Enter the Comments in the text box provided.
 - d. When done, click **Save** to continue.

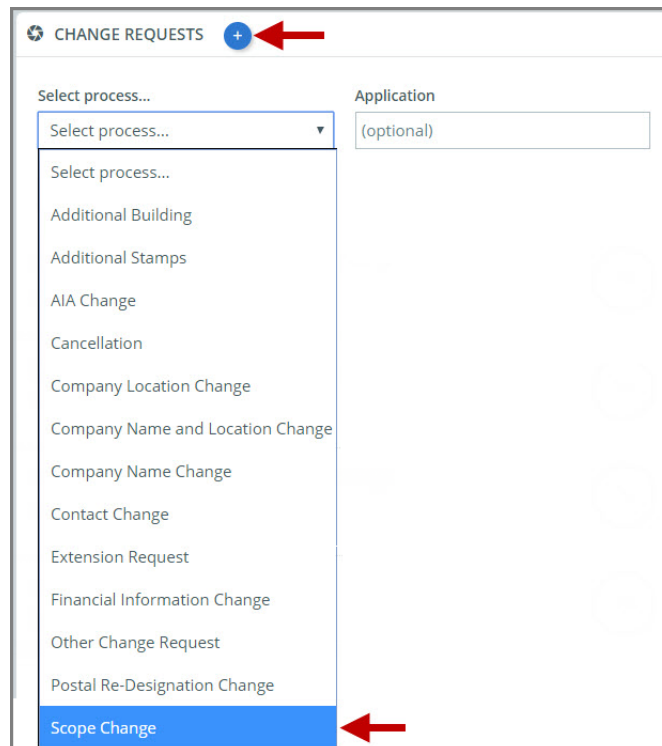
10. Initially the status of the change request will be **In Progress**. Once you complete entering all the required information for the change request,
 - a. Click the **In Process blue half-moon icon**.
 - b. Select **Complete**.



Scope Change

If scopes need to be added to or removed from a certificate, select the **Scope Change** request process.

1. Click the **Change Request blue (+) icon**.
2. Under **Select Process**, click the **down arrow** icon to display a selection list for the change request.
3. Scroll through change request list and select **Scope Change**.



4. Click **Create**.

CHANGE REQUESTS +

Select process...
Scope Change ▼

Application
(optional)

Create ←

5. The system will direct you to the **Processes** page. Under the **Submission and Initial Review** section of the page, select the **Create Form** link.

Submission and Initial Review ←

Status	Item	Assignee	
🕒	▼ Submission Data		
🕒	Change Request Detail	--	✎

Change Request Detail

Overview Comments

Due by 07/15/2019

Please submit all requested information.

Item	Form
Scope Change - Required	🕒 Create Form

In Progress

6. A form is displayed for you to enter the details relating to the change request you are applying for. Enter the following information:
 - Effective Date of Requested Changes
 - Certificate type and Certificate Number(s)
 - Scopes to be removed
 - Scopes to be added
7. When done, click **Save** to continue.

The screenshot shows a 'Form' dialog box with the following fields:

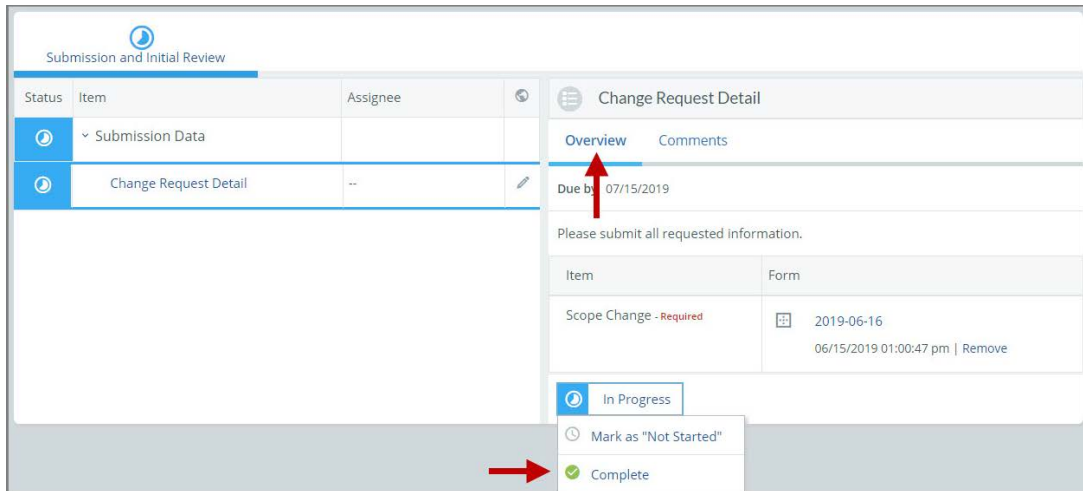
- Effective Date of Required Changes
- Certificate Type and Certificate Number(s)
- Scope(s) to be Removed
- Scope(s) to be Added

At the bottom right, there is a 'Save' button and a 'Cancel' button. Red arrows point to each of the four input fields and the 'Save' button.

8. You will be directed back to the previous page where the information you entered on the form is displayed.
9. **Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
 - a. Select the **Comments** link.
 - b. Click the **+Comment** link.
 - c. Enter the Comments in the text box provided.
 - d. When done, click **Save** to continue.

The screenshot shows a 'Change Request Detail' page. It features a table with the following columns: Status, Item, Assignee, and a 'Change Request Detail' column. The 'Change Request Detail' column contains a '+ Comment' link. Below the table, there is a text box for entering comments and a 'Save' button. Red arrows point to the '+ Comment' link, the text box, and the 'Save' button.

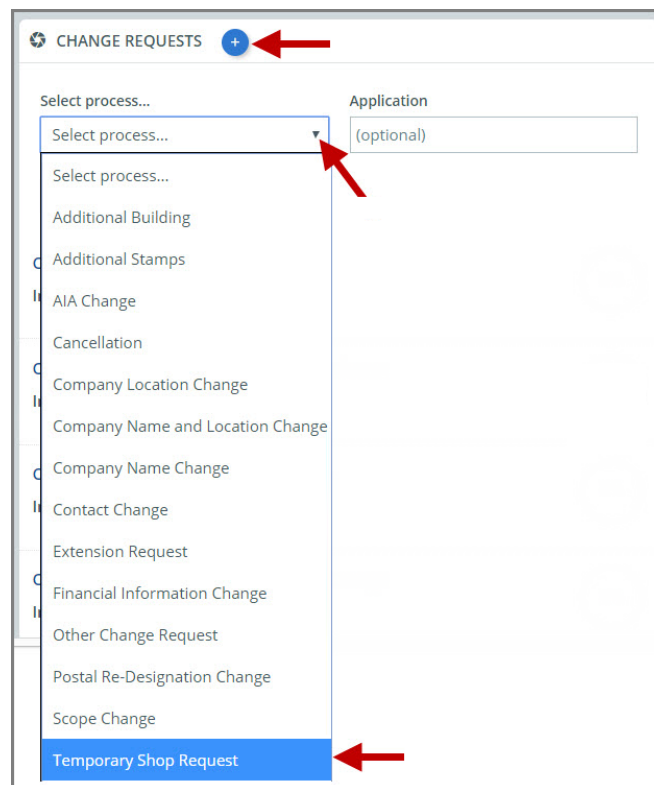
10. Initially the status of the change request will be **In Progress**. Once you complete entering all the required information for the change request,
 - a. Click the **In Process blue half-moon icon**.
 - b. Select **Complete**.



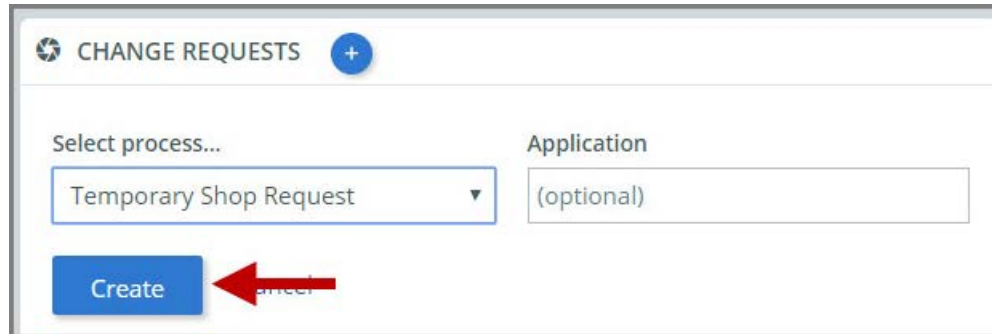
Temporary Shop Request

If the use of a new location for a period of time is needed, select **Temporary Shop Request** change request.

1. Click the **Change Request blue (+) icon**.
2. Under **Select Process**, click the **down arrow** icon to display a selection list for the change request.
3. Scroll through change request list and select **Temporary Shop Request**.



4. Click **Create**.



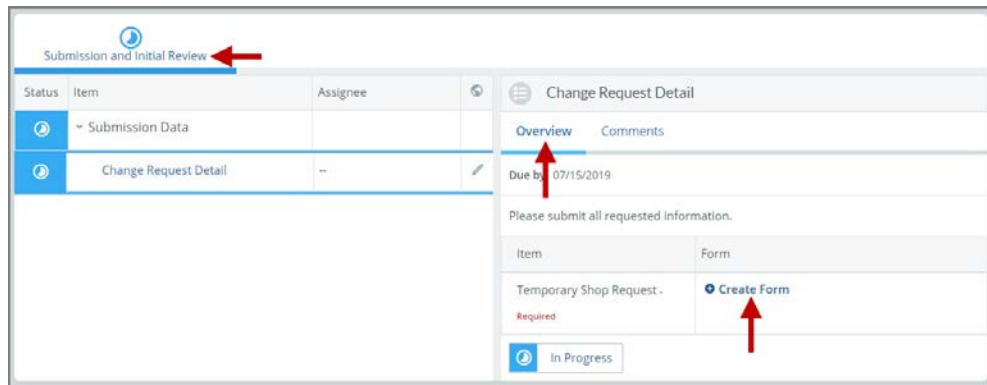
CHANGE REQUESTS +

Select process...
Temporary Shop Request

Application
(optional)

Create

5. The system will direct you to the **Processes** page. Under the **Submission and Initial Review** section of the page, select the **Create Form** link.



Submission and Initial Review

Status	Item	Assignee
	Submission Data	
	Change Request Detail	--

Change Request Detail

Overview Comments

Due by 07/15/2019

Please submit all requested information.

Item	Form
Temporary Shop Request -	Create Form

In Progress

6. A form is displayed for you to enter the details relating to the change request you are applying for. Enter the following information:
- Effective Date of Requested Changes
 - Certificate type and Certificate Number(s)
 - Scopes to be removed
 - Scopes to be added
7. When done, click **Save** to continue.

Form

Effective Date of Requested Changes

Certificate Type(s)

Certificate Number(s)

Distance from Current Shop (in miles)

Address of Temporary Shop

Start Typing

Save Cancel

8. You will be directed back to the previous page where the information you entered on the form is displayed.
9. **Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
 - a. Select the **Comments** link.
 - b. Click the **+Comment** link.
 - c. Enter the Comments in the text box provided.
 - d. When done, click **Save** to continue.

Submission and Initial Review

Status	Item	Assignee
🕒	Submission Data	
🕒	Change Request Detail	--

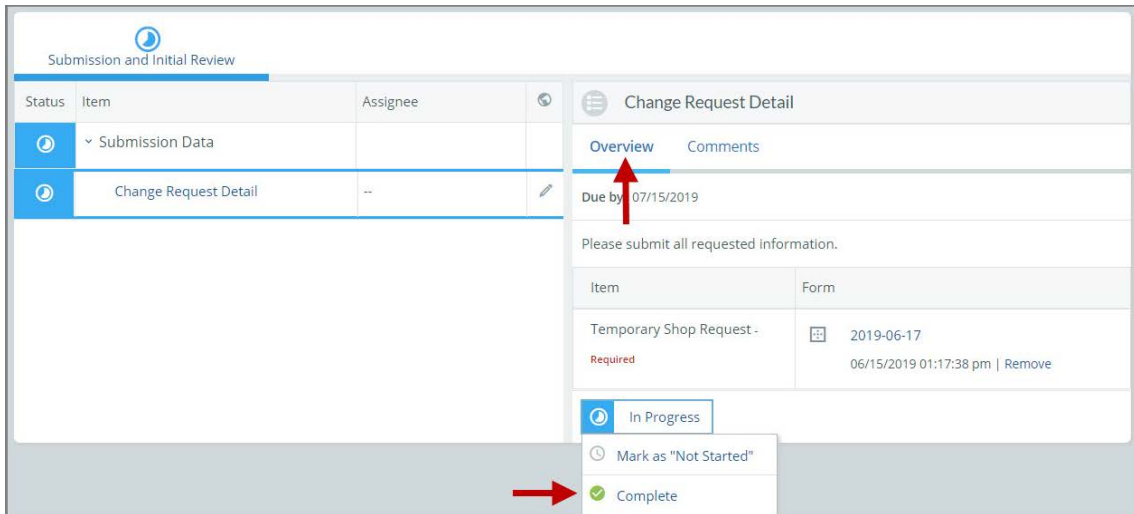
Change Request Detail

Overview Comments

+ Comment

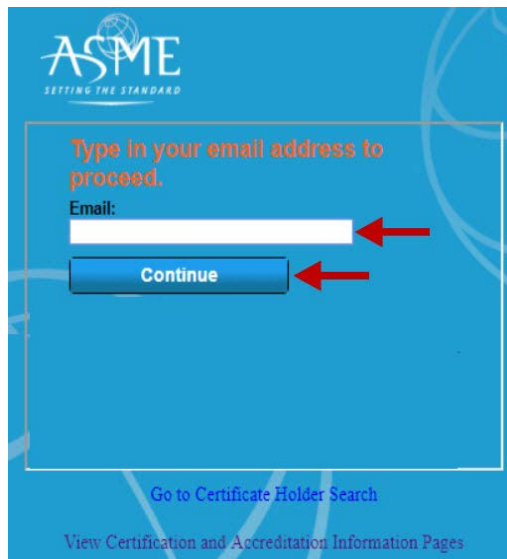
Save Cancel

10. Initially the status of the change request will be **In Progress**. Once you complete entering all the required information for the change request,
 - a. Click the **In Process blue half-moon icon**.
 - b. Select **Complete**.



Search Certificate Holders

You can use the Directory to find companies that have been evaluated and approved by ASME. To locate information on a Certificate Holder and bypass the login, click the **Go to Certificate Holder Search** link.



You can locate a company and certificate-related information by entering the corresponding information in the search fields illustrated below. When done, click the **Search** option to initiate the search.

Certificate Holder Search

Company Name

Country/Region Choose a Country

City

Certificate Type Choose a Certificate Type

Status

- Active
- Suspended
- Withdrawn
- Terminated

[Clear](#)

[Search](#) [Clear](#)

Once you have located the certificate holder, select the checkbox to the left of the Company Name. Click the **Print Details for Selected Items** link.

Certificate Holder Search

Company Name

Country/Region Choose a Country

City

Certificate Type Choose a Certificate Type

Status

- Active
- Suspended
- Withdrawn
- Terminated

[Clear](#)

[Search](#) [Clear](#)

[Print Details for Selected Items](#)

	Company Name	Plant Address	City	State/Province	Country/Region	Certificate	Status
<input type="checkbox"/>	Test BPV Company	1561 Unionport Road	Bronx	NY	United States	58082	Active
<input type="checkbox"/>	Test BPV Company	1561 Unionport Road	Bronx	NY	United States	58083	Active
<input type="checkbox"/>	AIA Company - Iecr (Test)	3 Park Avenue	New York	NY	United States	AIA-142	Active
<input type="checkbox"/>	Test Nuclear Company	1561 Unionport Road	Bronx	NY	United States	N-4771	Active

A PDF document, containing the Certificate Holder Details, will be downloaded to your local computer for you review and print.

CA Connect

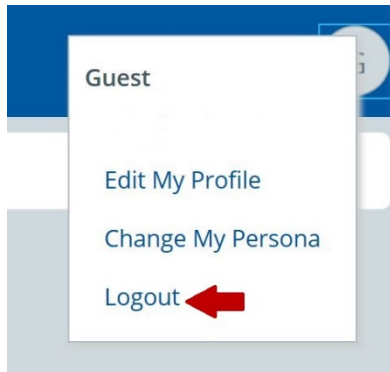


CERTIFICATE HOLDER DETAILS

Certificate Type:	A
Certificate Number:	58082
Certificate Status:	Active
Company Name:	Test BPV Company
Legal Name:	Test Boiler Pressure Valve Company
Division Name:	Testing
Company Address:	1561 Unionport Road MC Bronx New York 10462 - United States
Scope:	A-1 - Assembly of power boilers at field sites controlled by the above location
Authorized Date:	06/26/2019
Expiration Date:	11/09/2019

Logout

To log out of the system, look in the upper right corner of the screen for a circle with your initials. Click on the circle and then select **Logout**. You will be redirected to the **Sign In** screen as proof of successful logout.



ASME Program Administrator Assistance

For support with login issues and concerns regarding applications and certificates, contact

Angela Holmes
Program Administrator, CA Operations
(212) 591-8531
HolmesA@asme.org,