ASME Conformity Assessment CA Connect BPV New & Renewal
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.

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.**
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.

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.
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.
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.
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. Your local computer and upload the file.

47. Select the **Upload Agreement Form** link.

48. Locate the signed agreement form on
   a. If necessary, can remove the form. However, uploading a completed and sign Agreement Form is required.

49. Click **Save** to continue.
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.

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 assigning the certificate number.
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.