ASME® | CA Connect

Quick Reference Guide

CA Connect User Guide

V1.0

The American Society of Mechanical Engineers®
ASME®

ASME® | CA Connect

Quick Reference Guide

How To Log In to CA Connect 3

How to Invite a New Member to CA Connect 7

How to Create a new CA Connect Application 13

How to Submit a CA Connect Change Request 25

How to View and Download Your ASME Certification 33

How To View Your CA Connect Invoices 36

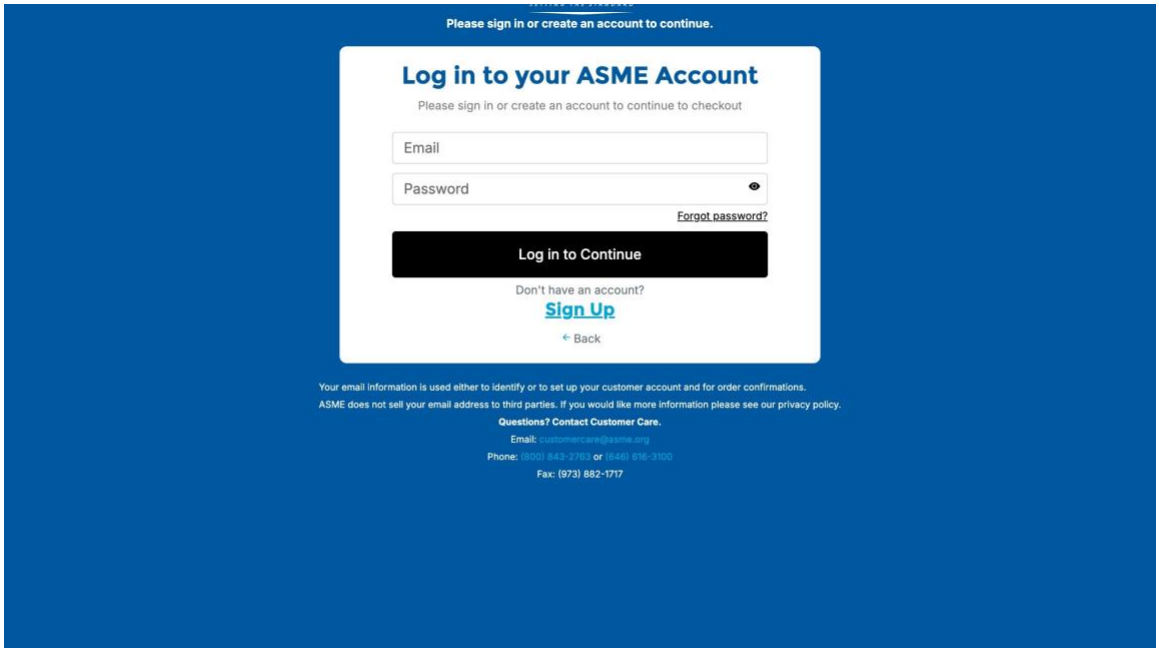
ASME® | CA Connect

Quick Reference Guide

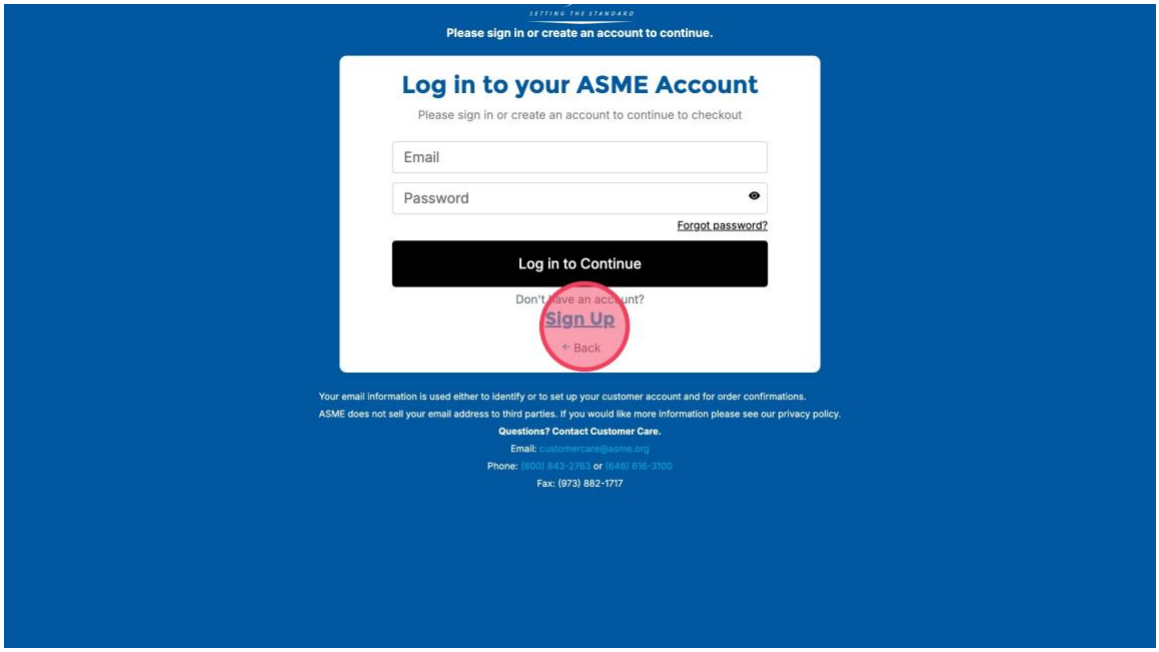
How To Log In to CA Connect

Follow this guide to learn how to register for a new ASME.org account and then sign in to CA Connect. This walkthrough covers the new account sign-up process.

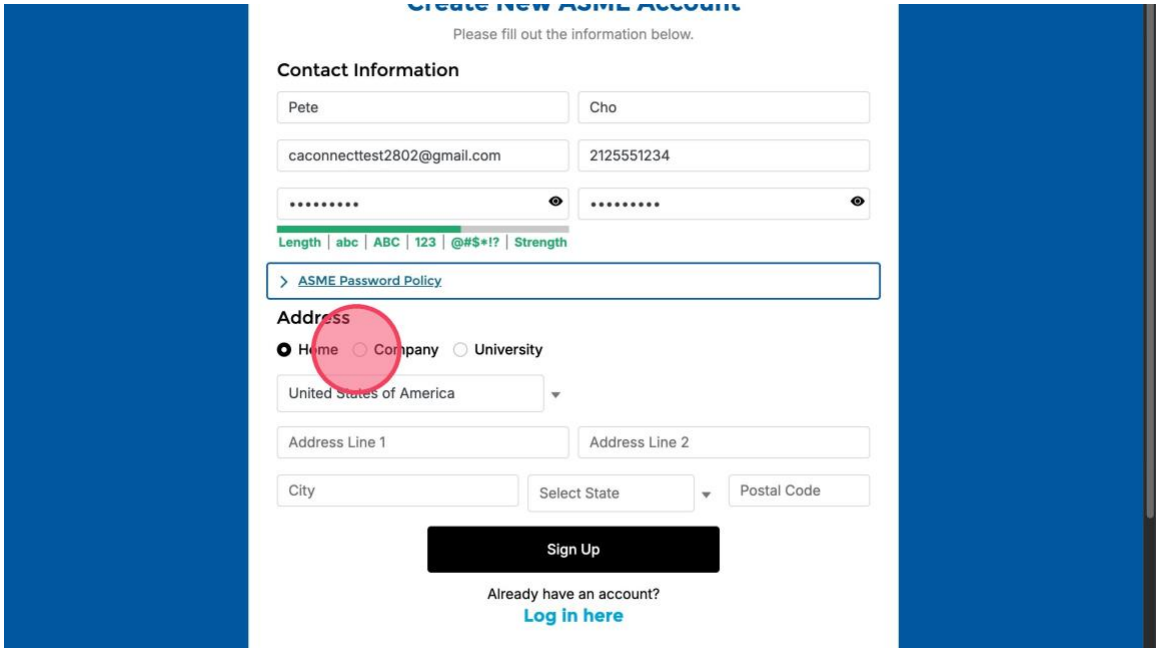
1. Navigate to the CA Connect login page at https://caconnect.asme.org/. If you have an existing ASME.org account, enter your email and password and select “Log in to continue.”



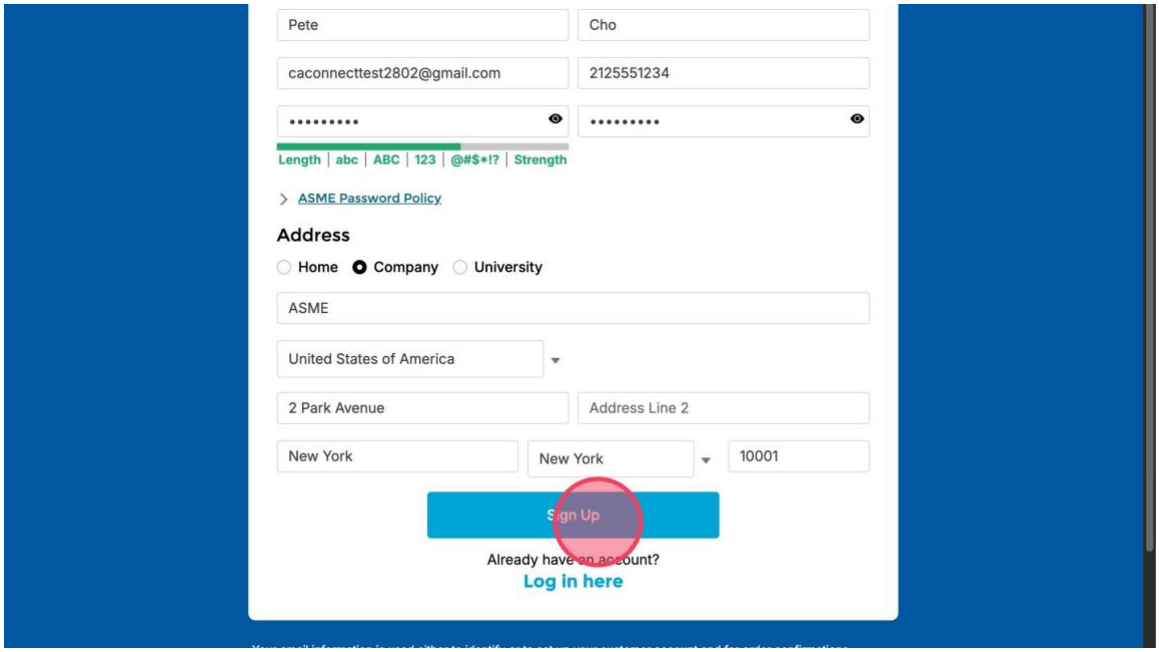
2. If you do **not** have an existing ASME.org account, select the "Sign Up" link.



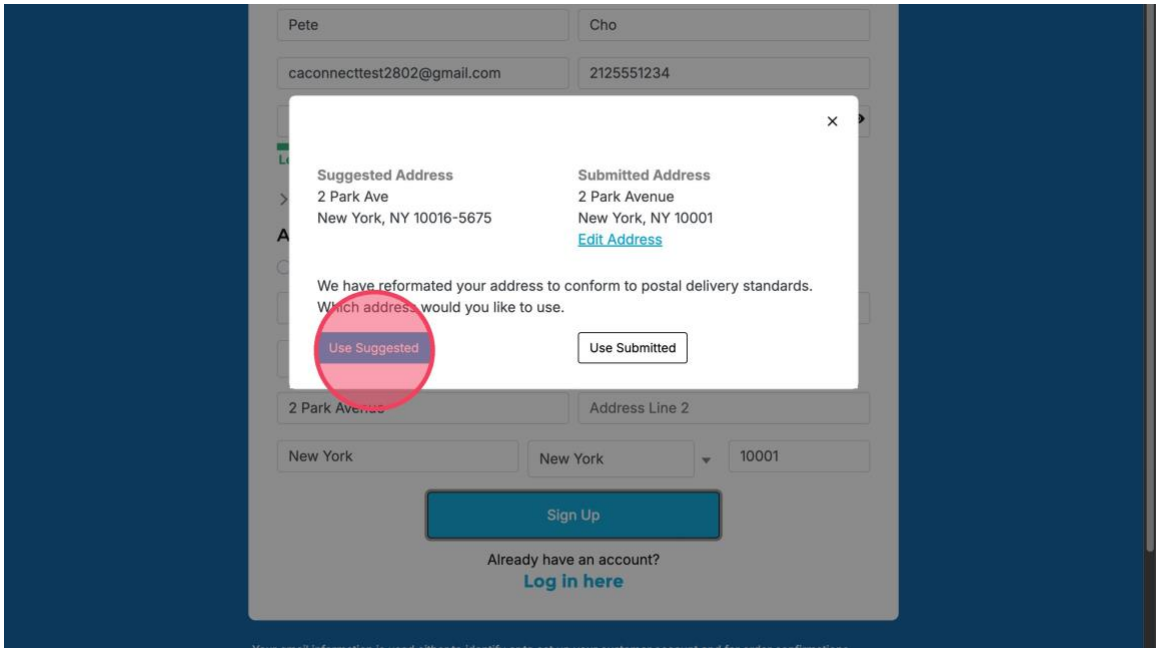
3. If you have been invited by a team member, you will need to enter your name, company email address, phone number, and desired password into the respective fields. Note the password policy.
4. Select the **Company** option under the Address section – this is required for CA Connect access.



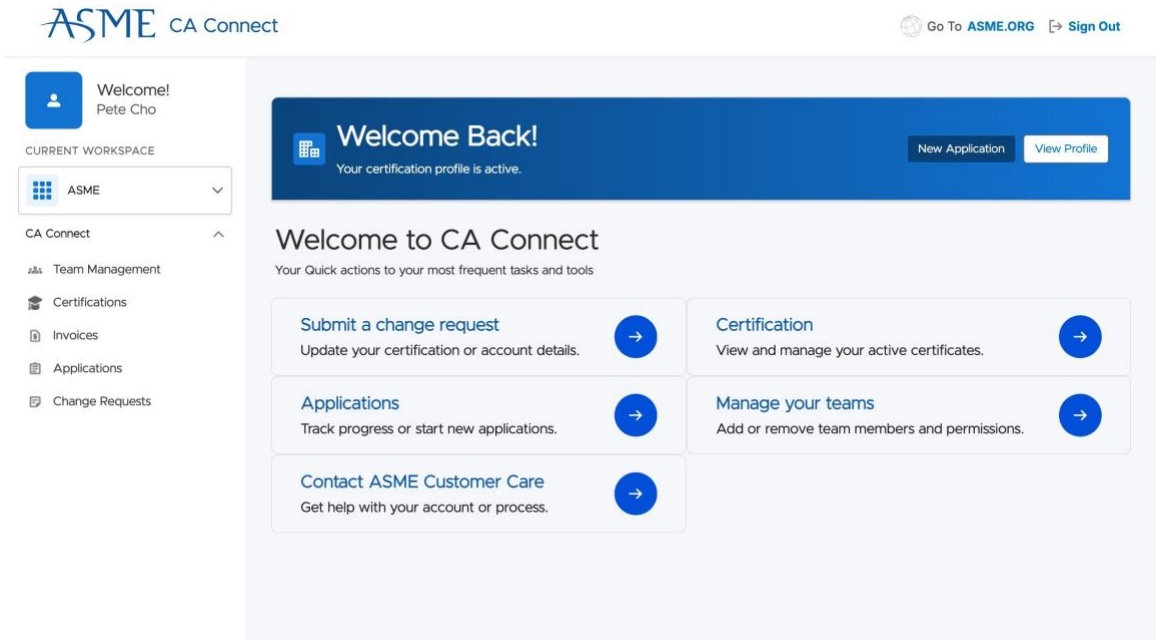
5. Enter your company's exact information and click "Sign Up." If you have been invited by a team member, this information is all in your invitation email. Make sure to use the exact information provided in that email, as any typos will result in an error associating your ASME.org account to your company.



6. Verify the suggested USPS formatted address before accepting it. Address selection may affect company matching.



7. Congratulations! You are now registered. If you don't see the CA Connect dashboard, your access request may still be pending by your CA Connect Admin. If you still need assistance logging in, reach out to ASME Customer Care.



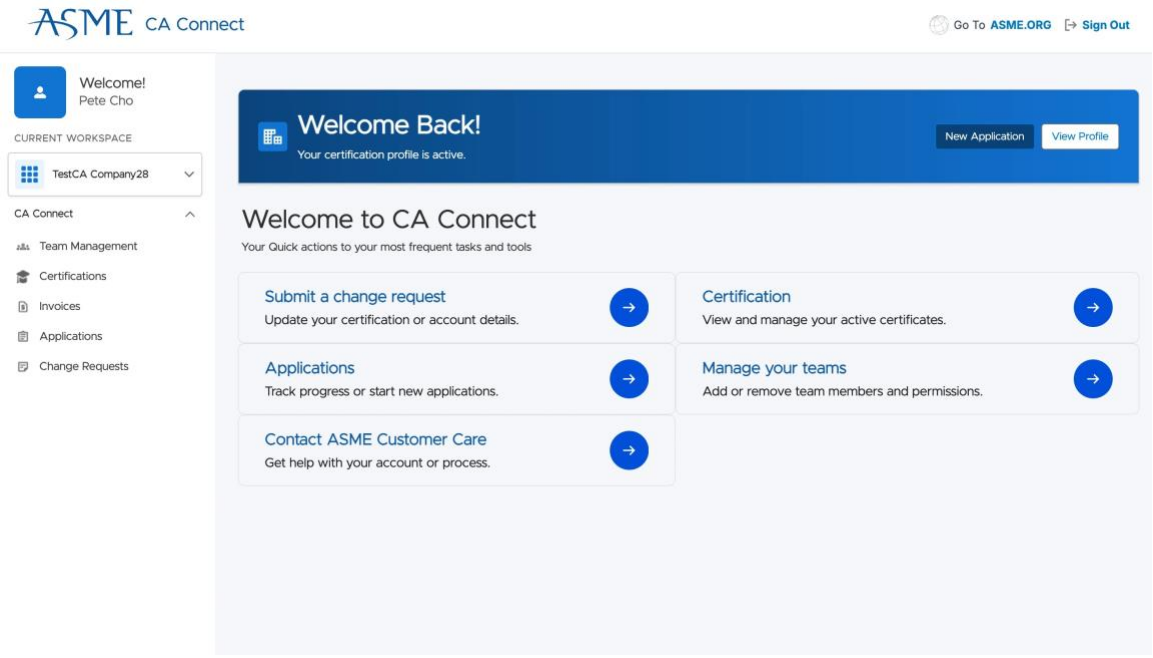
ASME | CA Connect

Quick Reference Guide

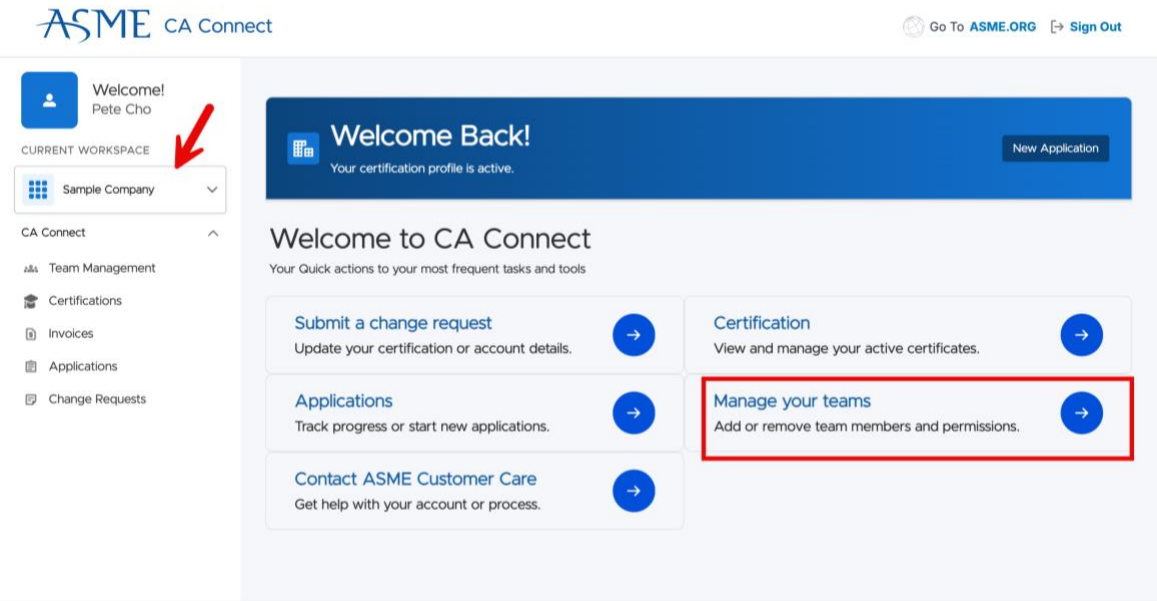
How to Invite a New Member to CA Connect

This guide walks you through the steps to invite a member to your team using the CA Connect portal. You must already have an ASME.org account and CA Connect Admin Role access. To create an ASME.org account, please review the “Log In to CA Connect” guide.

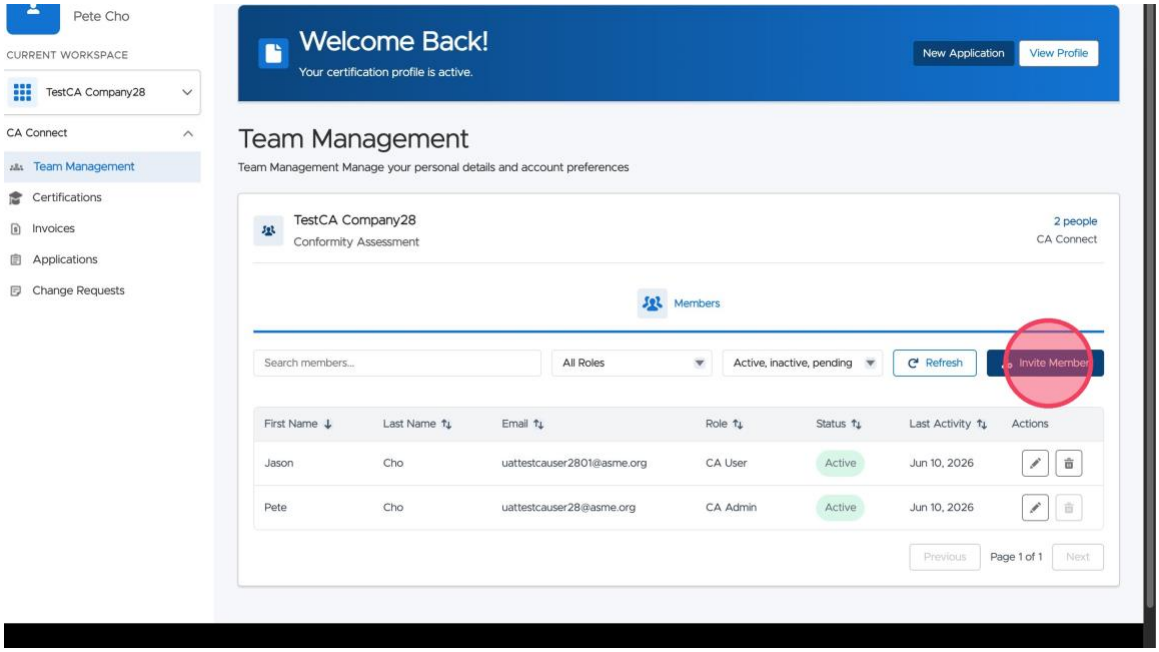
1. Navigate to the CA Connect home page.



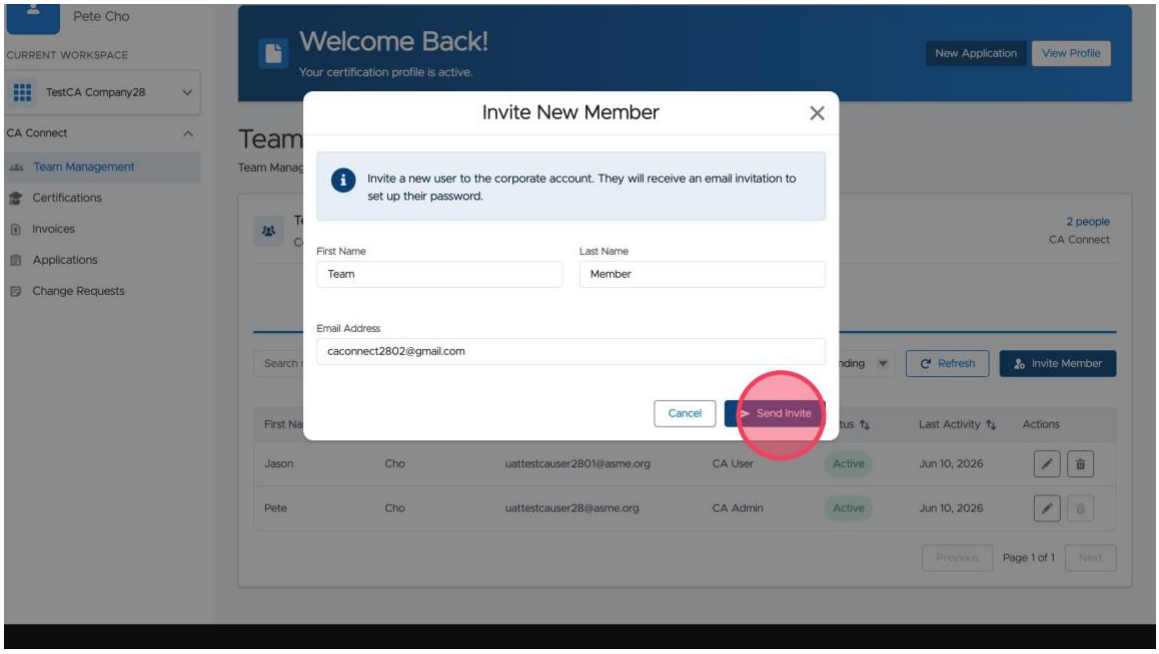
2. Select "Team Management" from the sidebar or "Manage your teams" from the home page. Also confirm that your company name is correct in the Current Workspace, if you have access to more than one company.



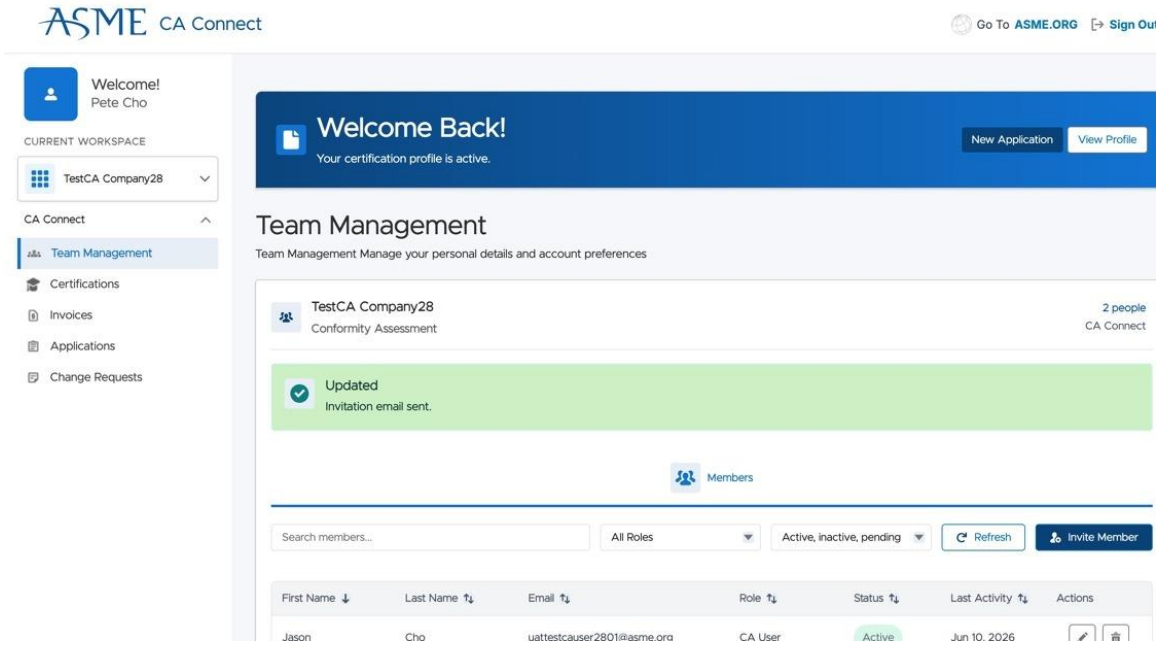
3. Click "Invite Member" and you will see the “Invite Member” window.



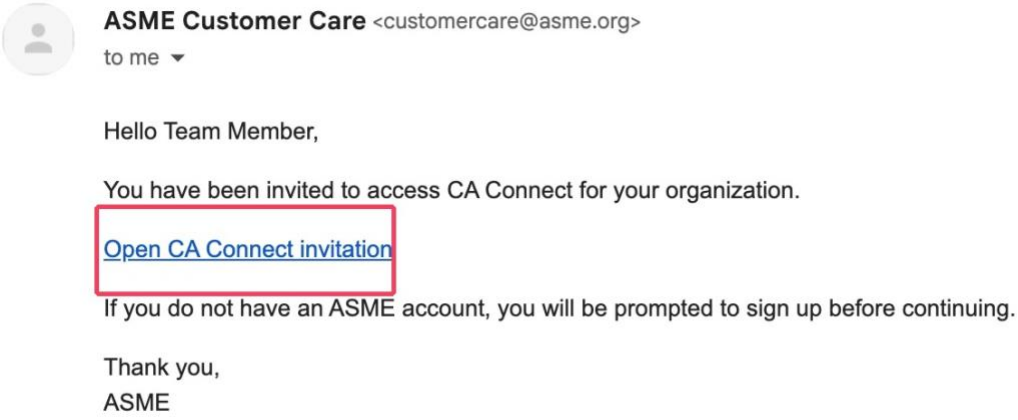
4. Enter the new member's name and email address and click "Send Invite." Use the team member’s company email, and the email should match the email on their ASME.org account. If the email is already associated to an existing user or a pending user, you will get an error message.



5. The invitation email gets sent. The invitee should look for a new email from ASME Customer Care. Check the Spam or Junk folder if they don't see it. If there are any issues with the email, please contact ASME Customer Care.

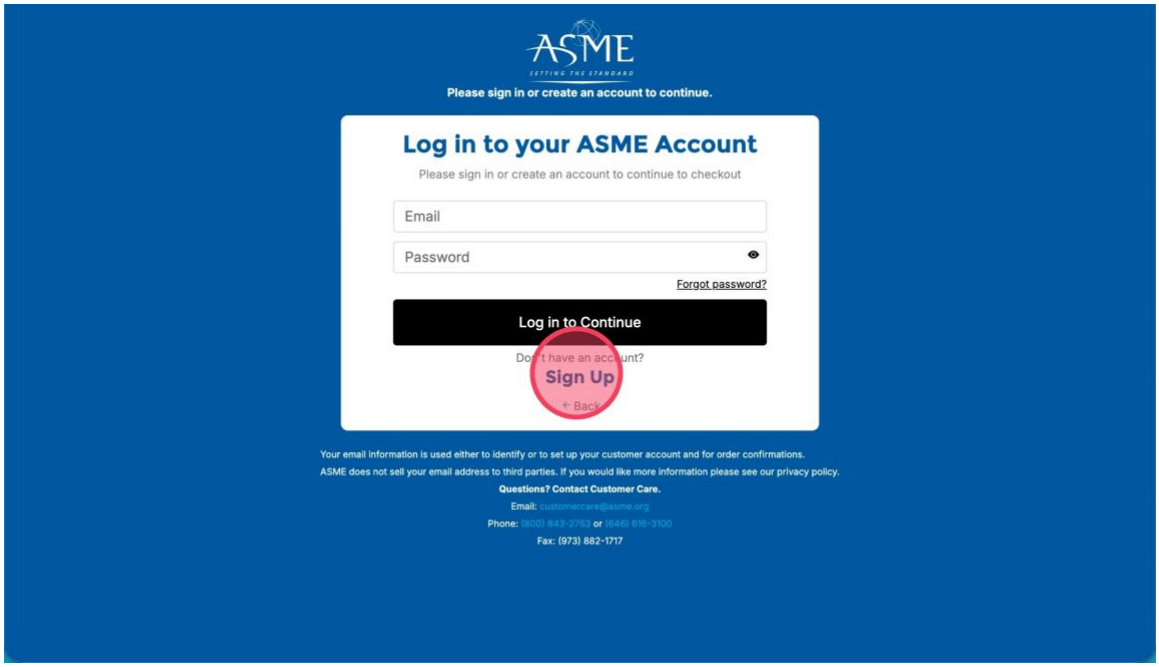


6. The new member will get an email invitation from ASME and click the link.

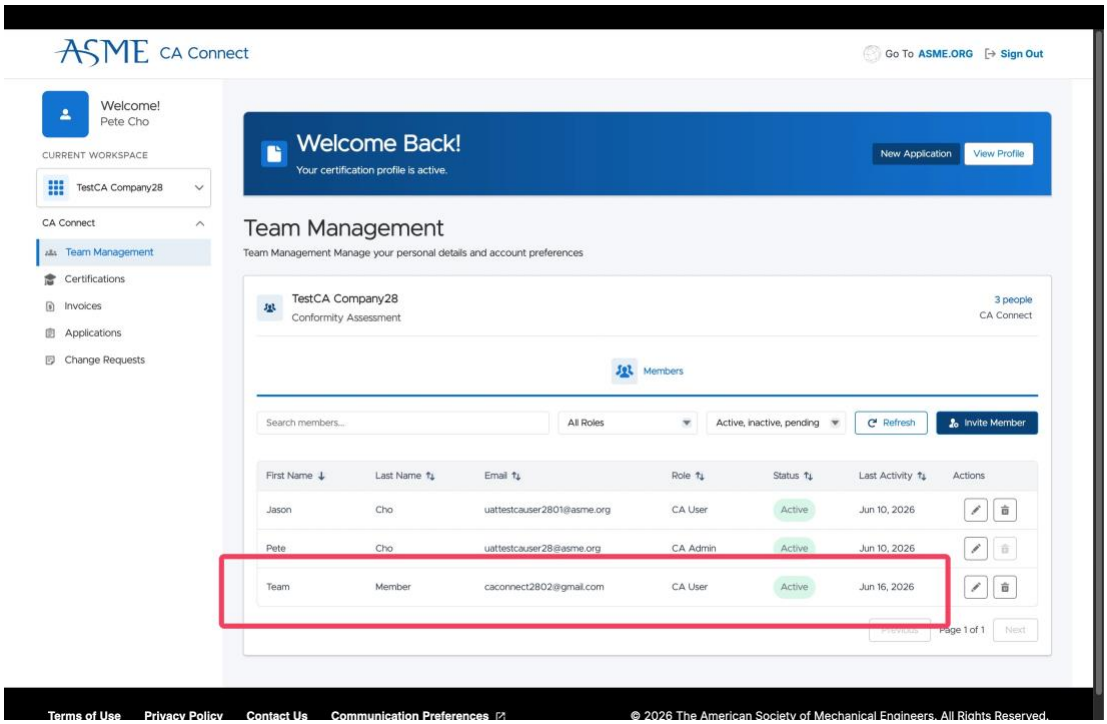


7. If they do not yet have an ASME account, they will need to sign up with their info and their company's name and primary address. **NOTE: They will need to sign up with the exact company name and address provided in the invitation.** This ensures their account is correctly associated to their company. Please follow the steps in

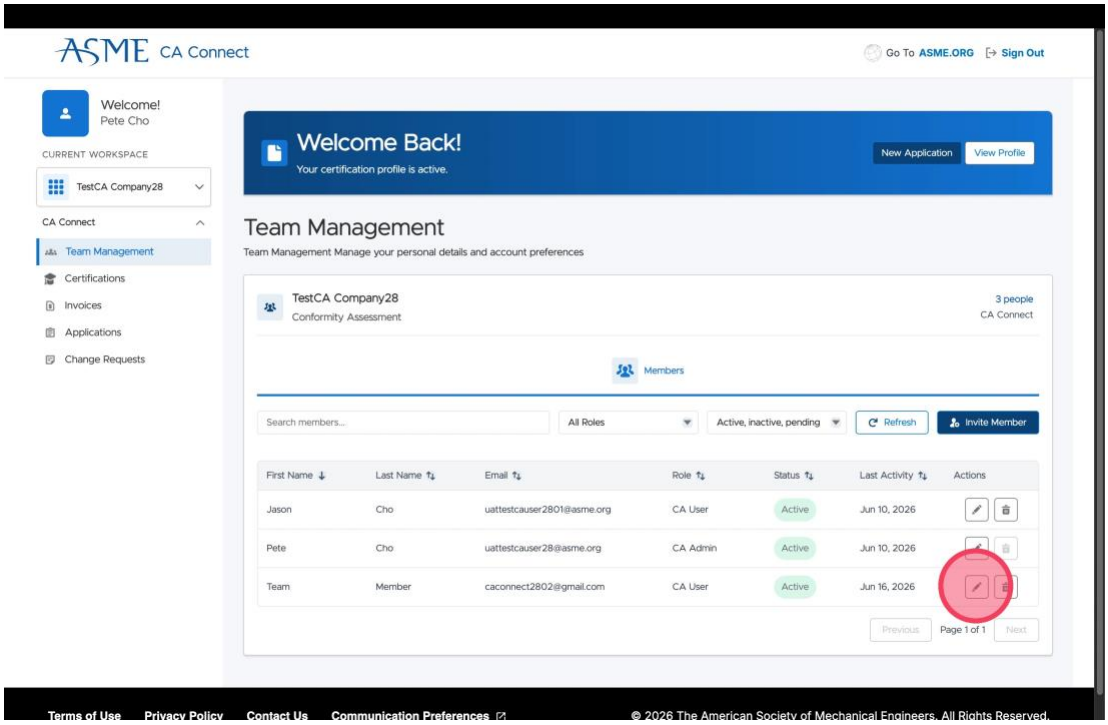
the **Log In to CA Connect** guide to create a new ASME.org account if needed. If there are any problems with their ASME.org account creation or CA Connect access, please reach out to Customer Care.



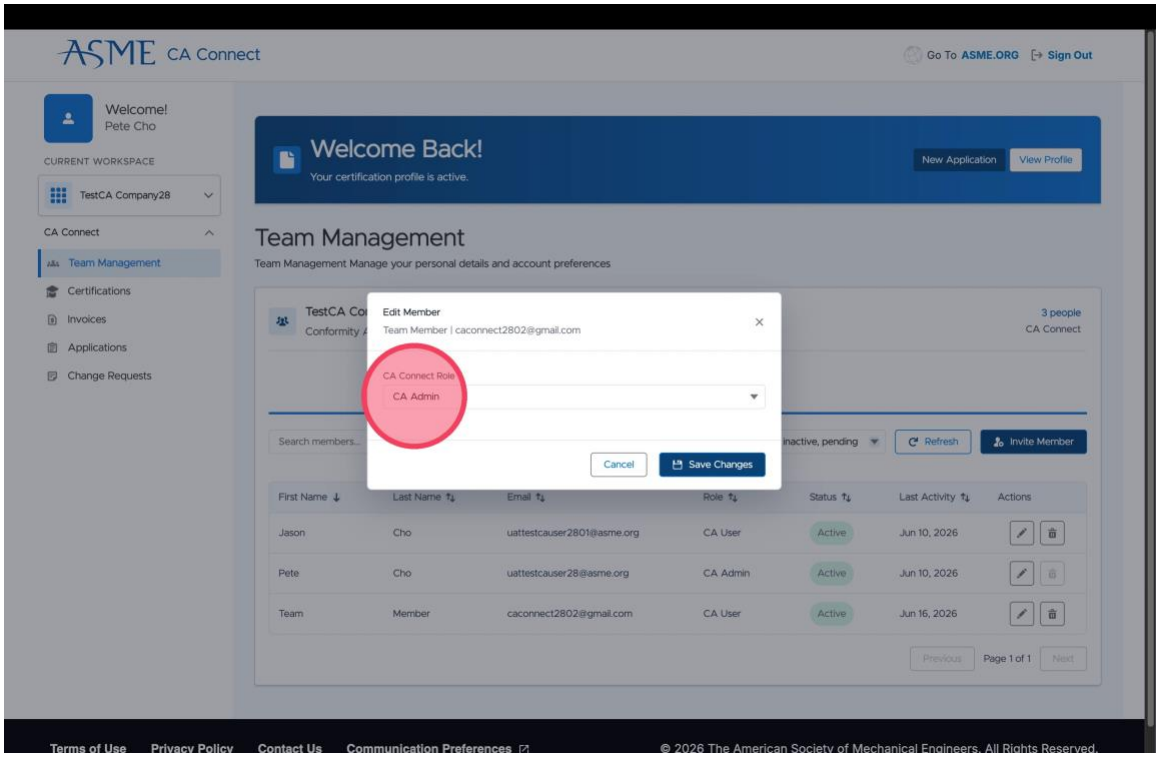
8. Once they have signed up for an ASME account, they will get access to CA Connect once any company approval is granted.



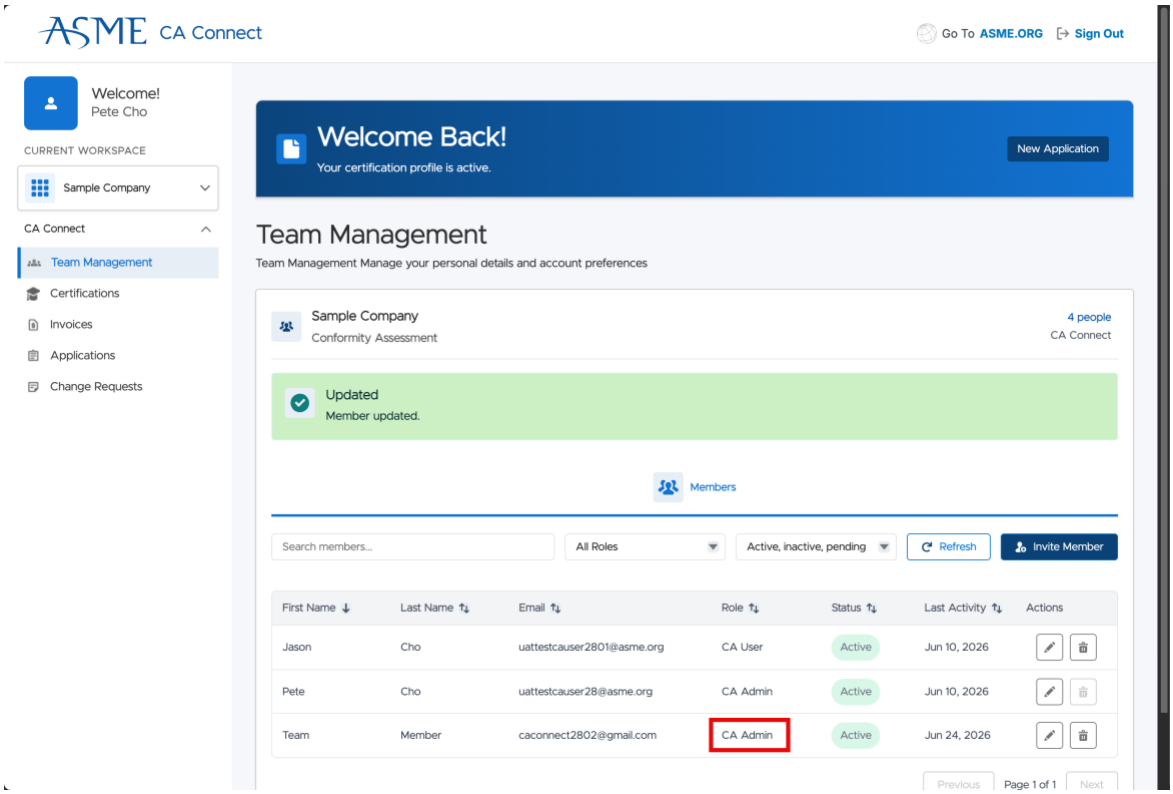
9. If desired, you can make this team member a CA Connect Admin clicking the pencil icon next to their name.
   NOTE: The Admin Role grants additional permissions for the selected company, including signing documents and adding and removing additional team members.



10. Select the CA Admin role from the dropdown and click Save Changes.



11. The team member will appear with the new Admin role in the member list.



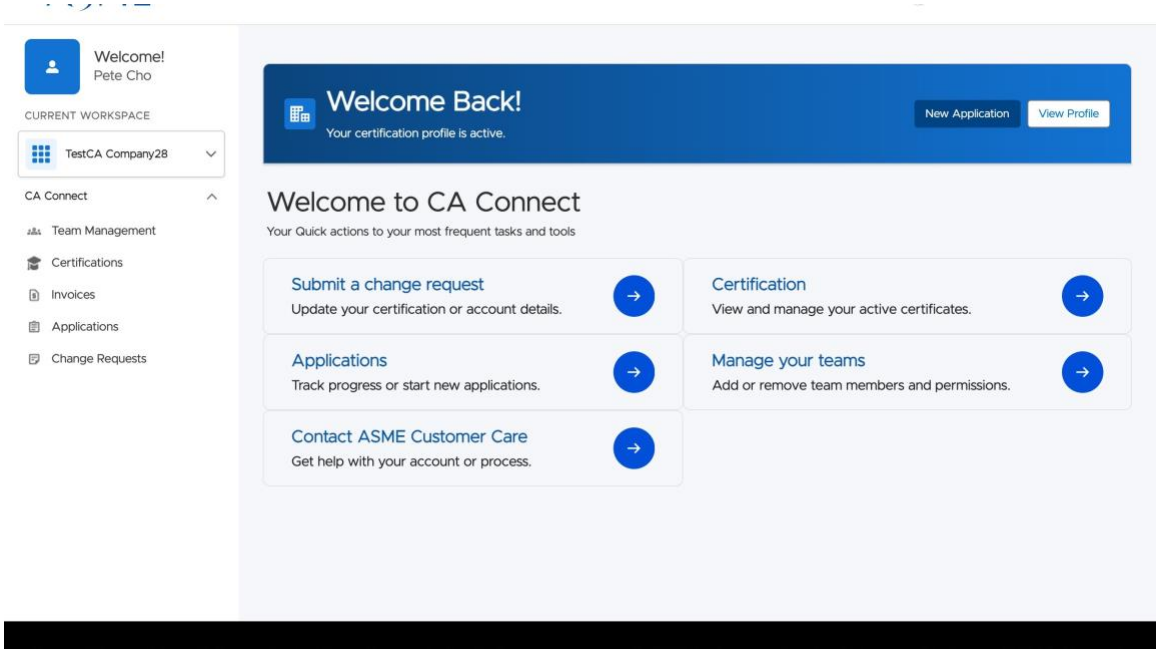
ASME® | CA Connect

Quick Reference Guide

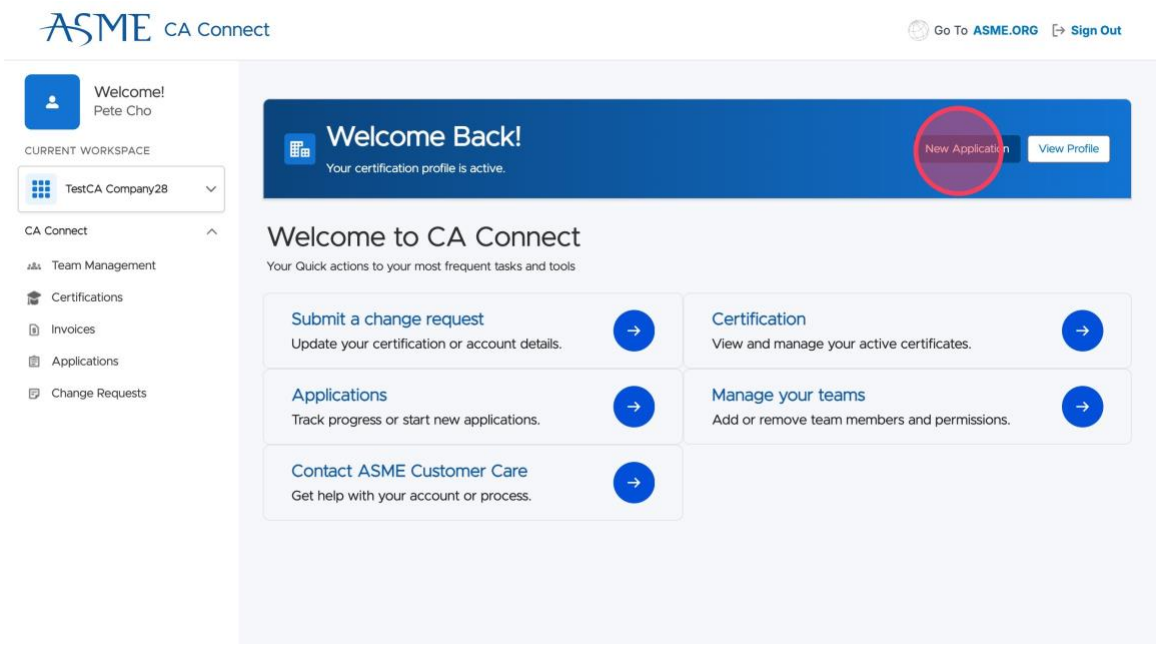
How to Create a new CA Connect Application

This guide walks through the process of creating a new or renewal Conformity Assessment application on the CA Connect portal. You must already have an ASME.org account and CA Connect access. To create an ASME.org account, please review the “Log In to CA Connect” guide.

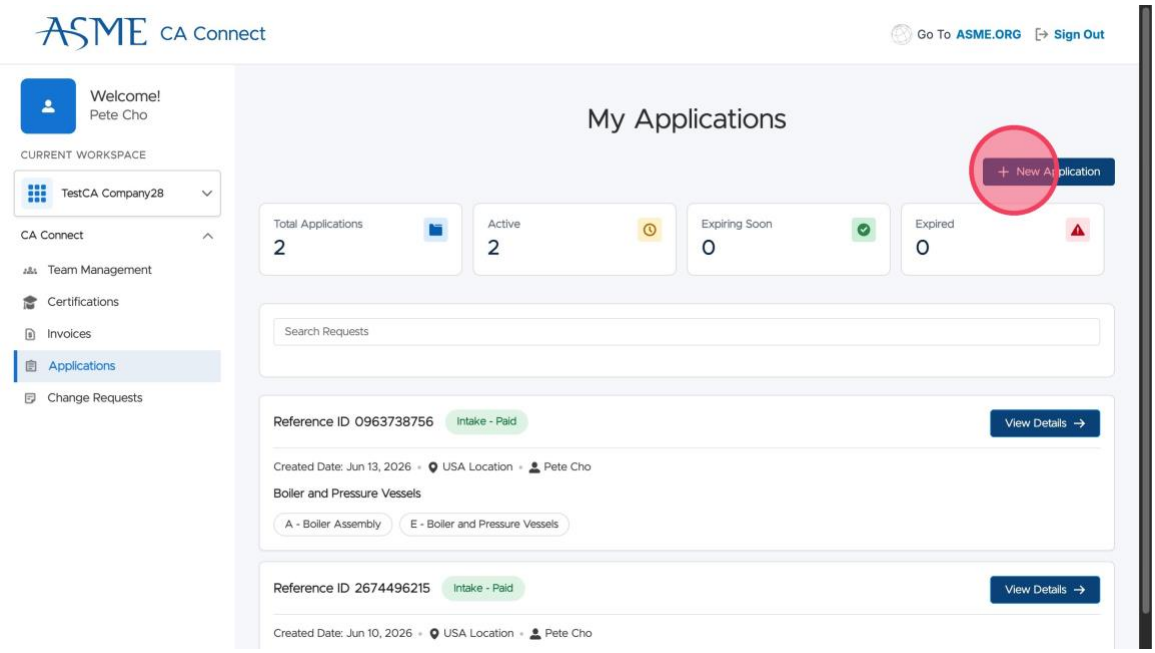
1. Navigate to the CA Connect home page.



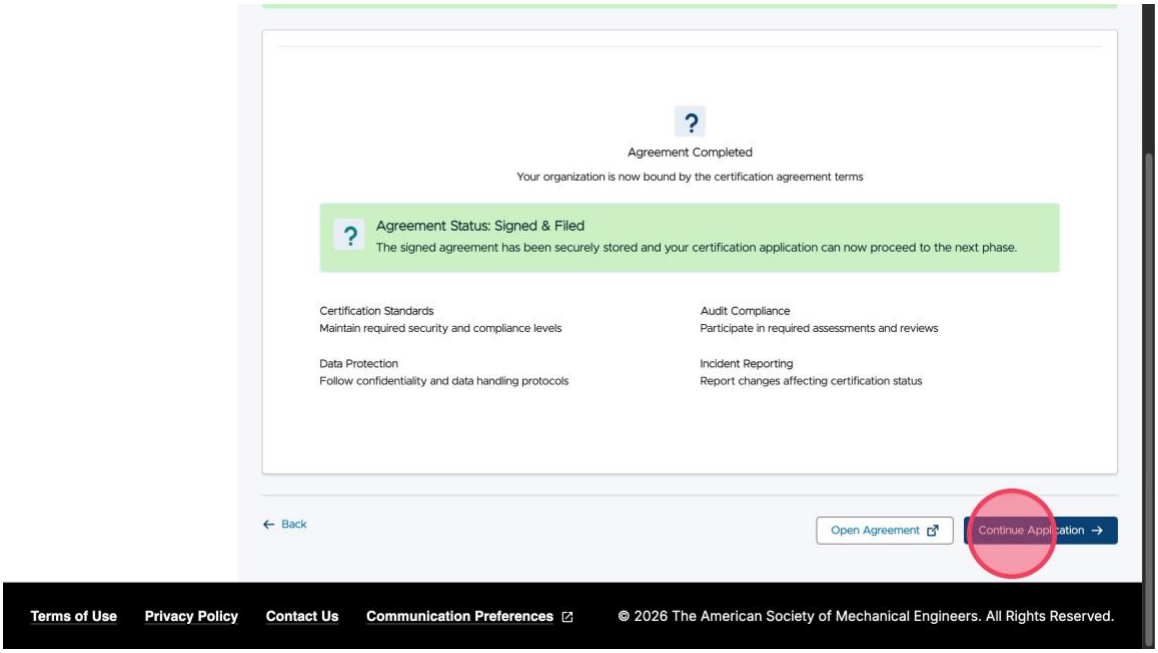
2. Click "New Application" from the dashboard.



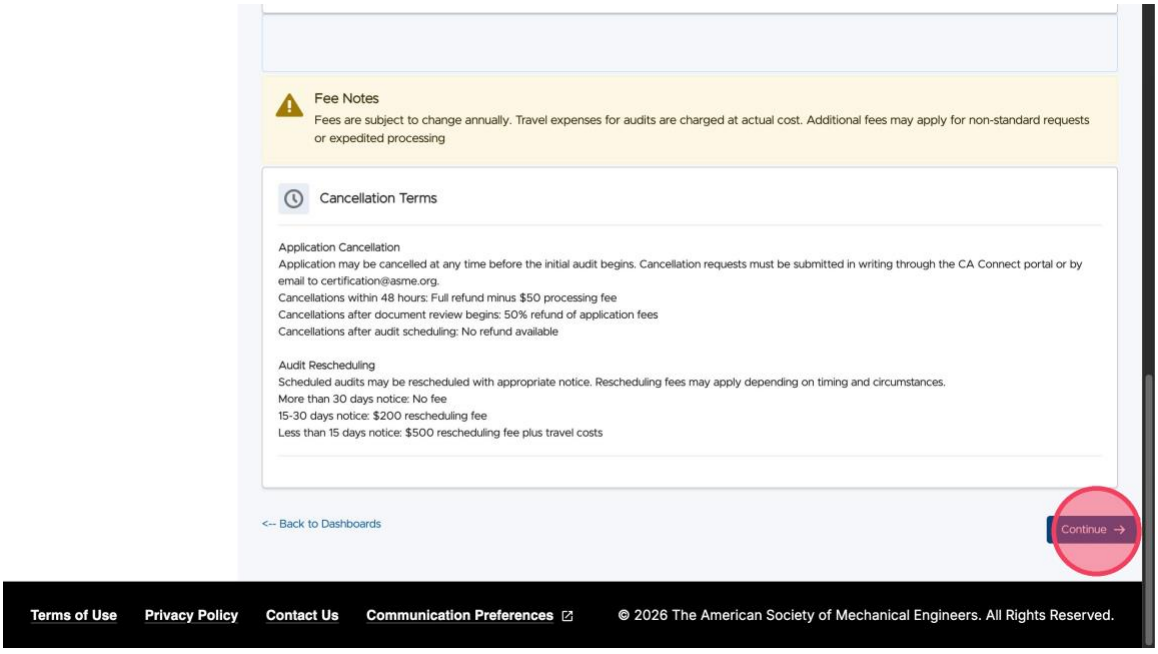
3. Click "+ New Application" on the My Applications page. You can see any existing in-progress applications here. You may want to continue an already in-progress application or start a new one, depending on the certification. If you're not sure, you can submit a Change Request. Instructions to do this are in the "Submit a Change Request" guide.



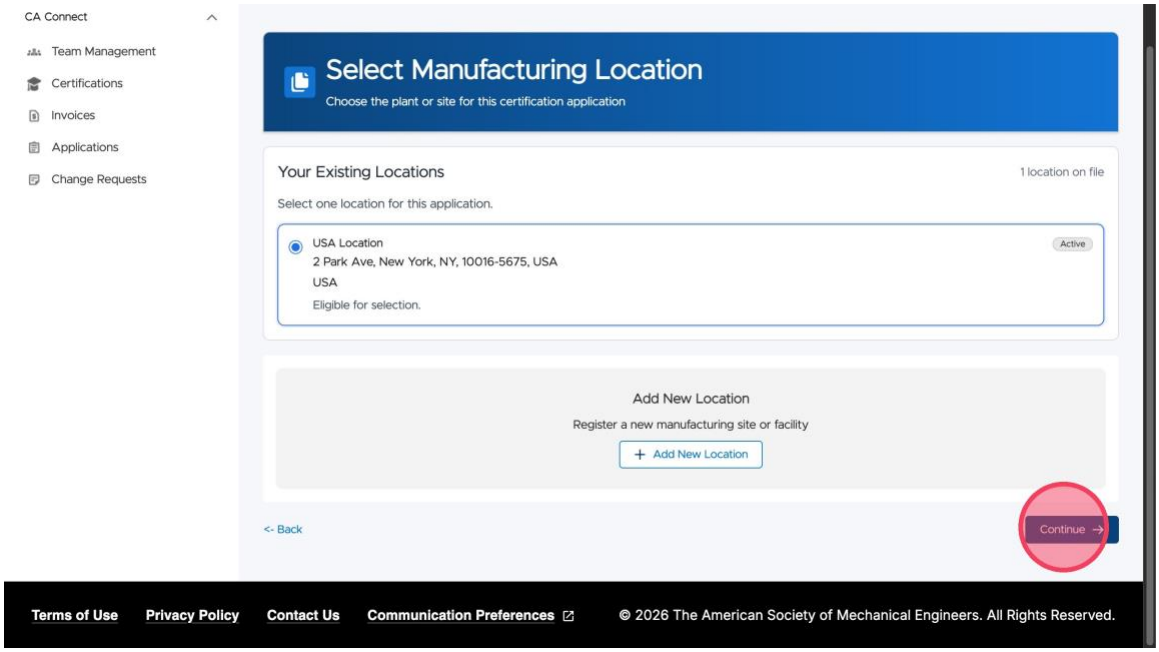
If you are a designated Company Admin, you have the ability to review and sign the company's agreement with ASME. You must be an authorized legal representative of the company and able to enter into agreements on behalf of the company. Once the agreement is signed, select "Continue Application."



4. Review the policies for certification and click "Continue" to proceed.

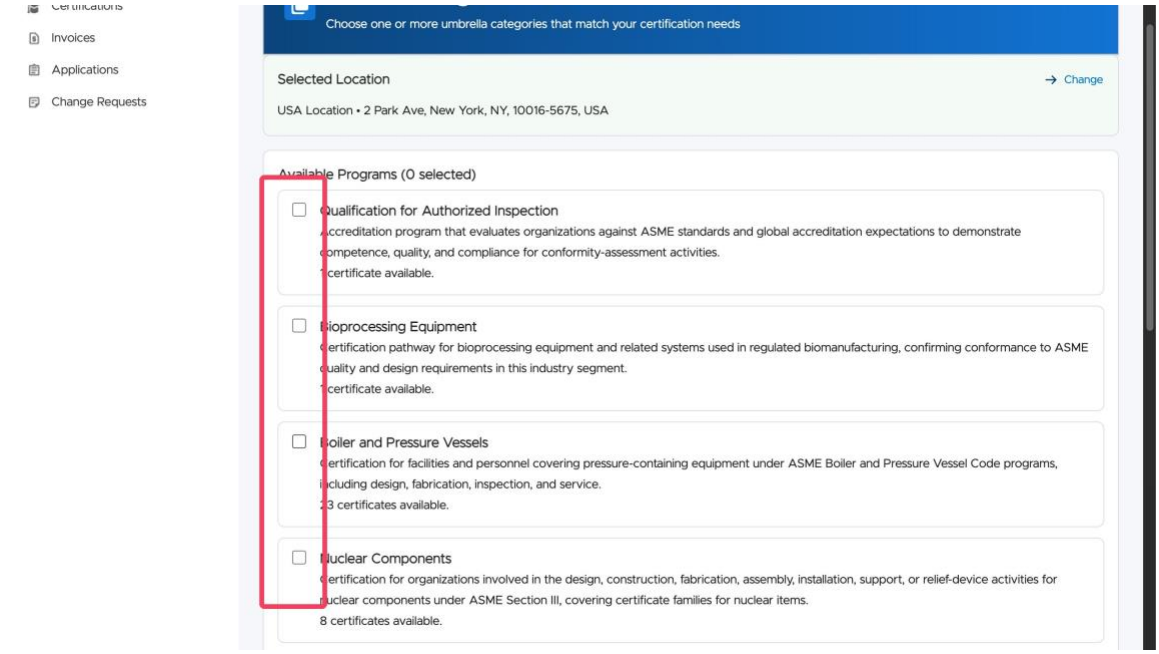


5. Select your manufacturing location. The location is pre-populated with company's primary address. You can create a new location here if the desired location for certification is not shown.

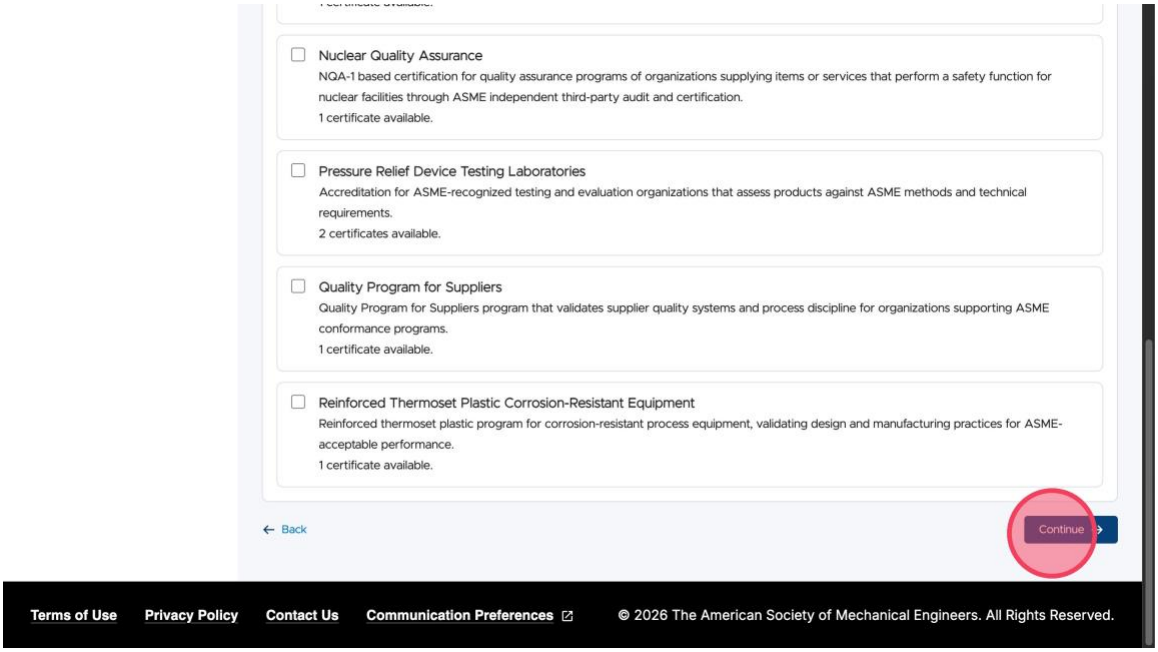


6. Choose from the available programs. Each program has one or more certification packages available, as shown below the Program description. The Programs available depend on your location, as not all programs are available in all locations.

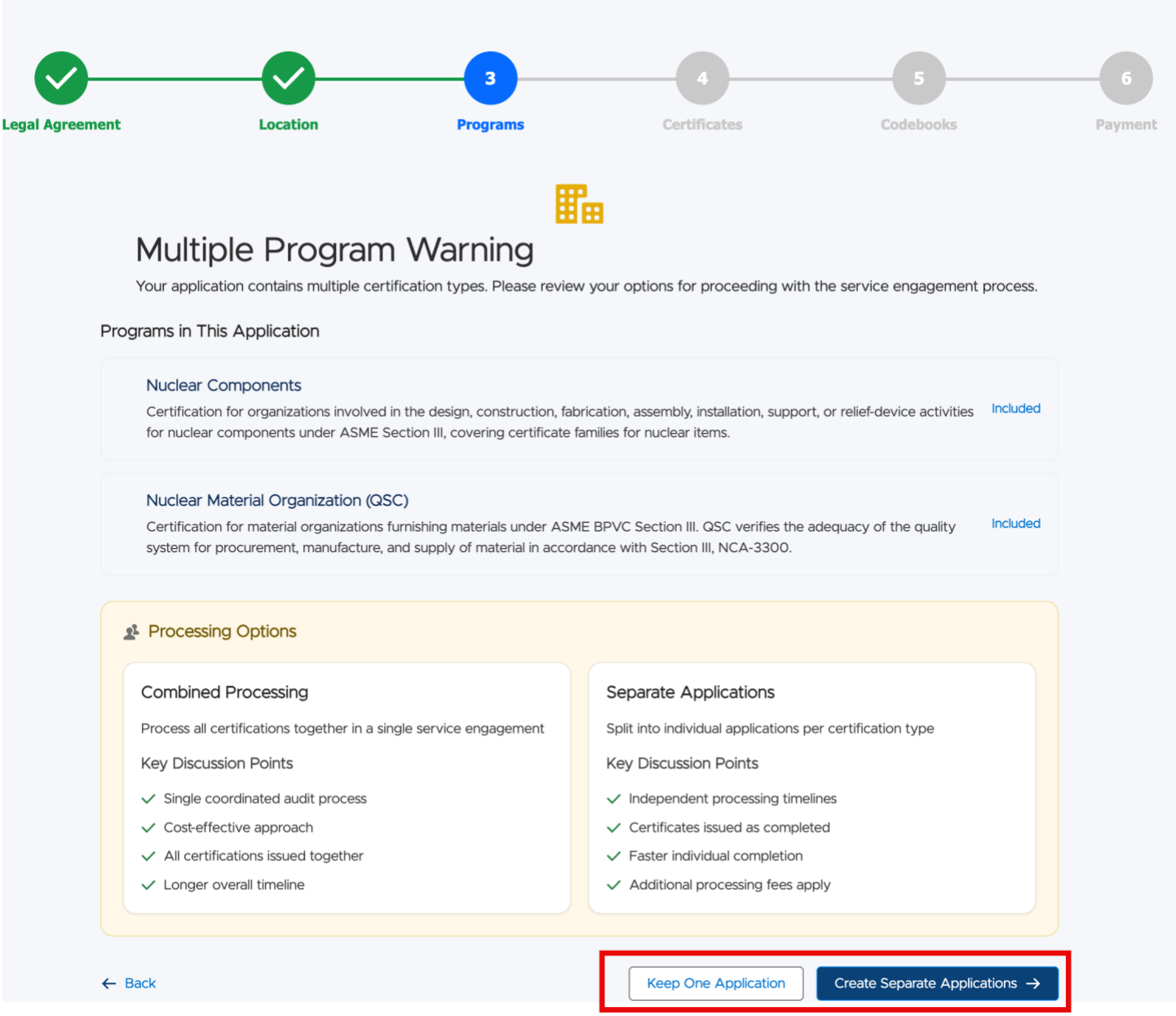
   ⚠ **NOTE: You can select multiple programs here if desired - see Step 8.**



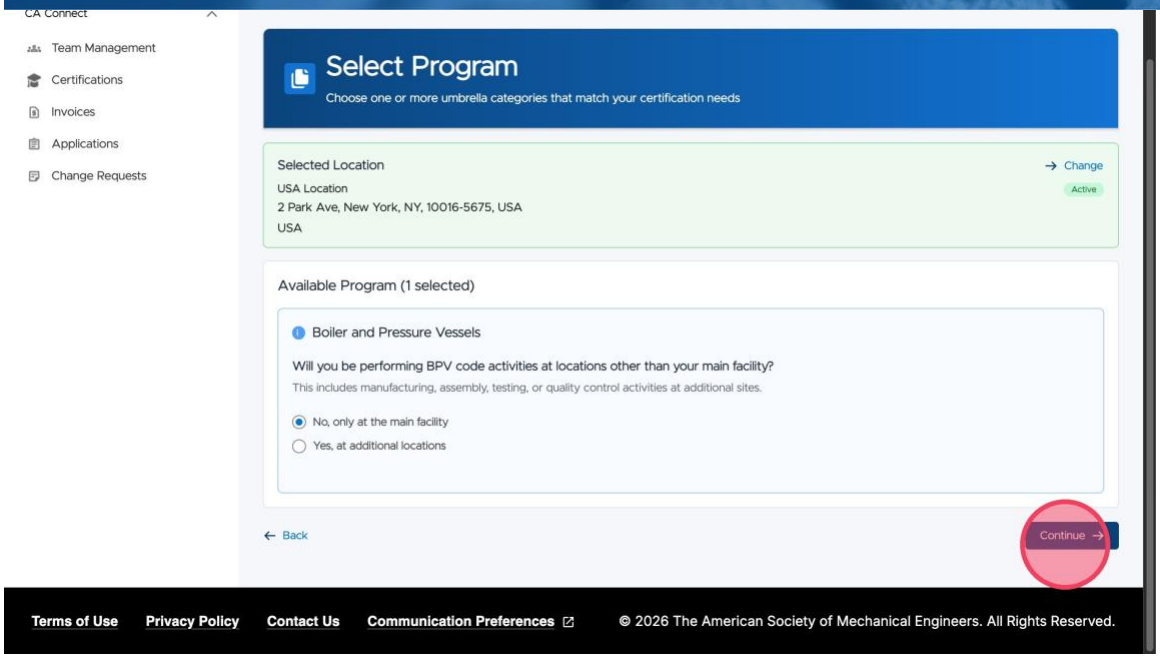
7. Click "Continue" to proceed.



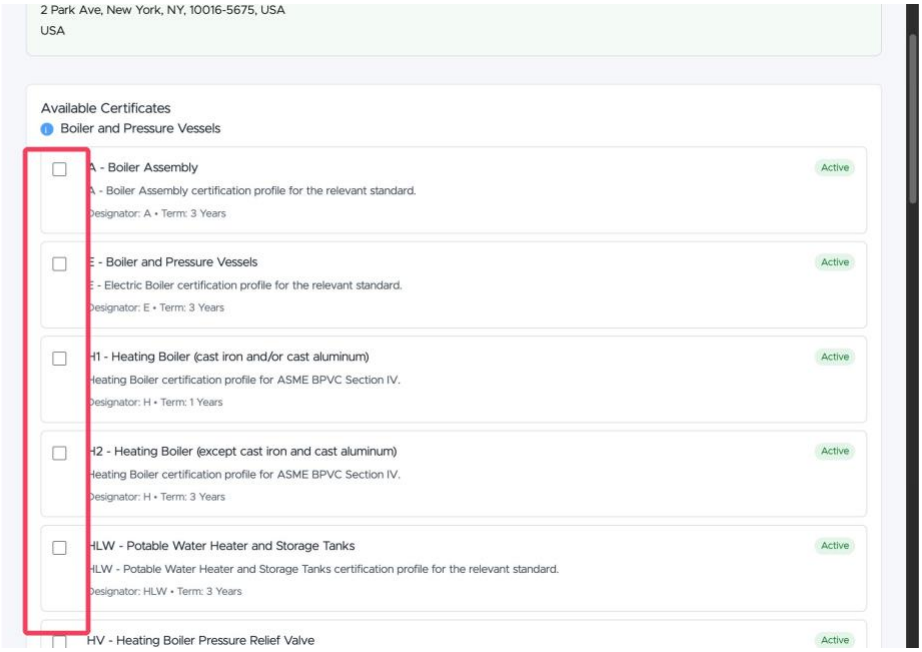
8. **OPTIONAL**: If you have selected multiple programs, you will see the below screen – you can choose to keep everything in a single application or split each program into individual applications. See below for the key points for each option, and choose one of the options to proceed.



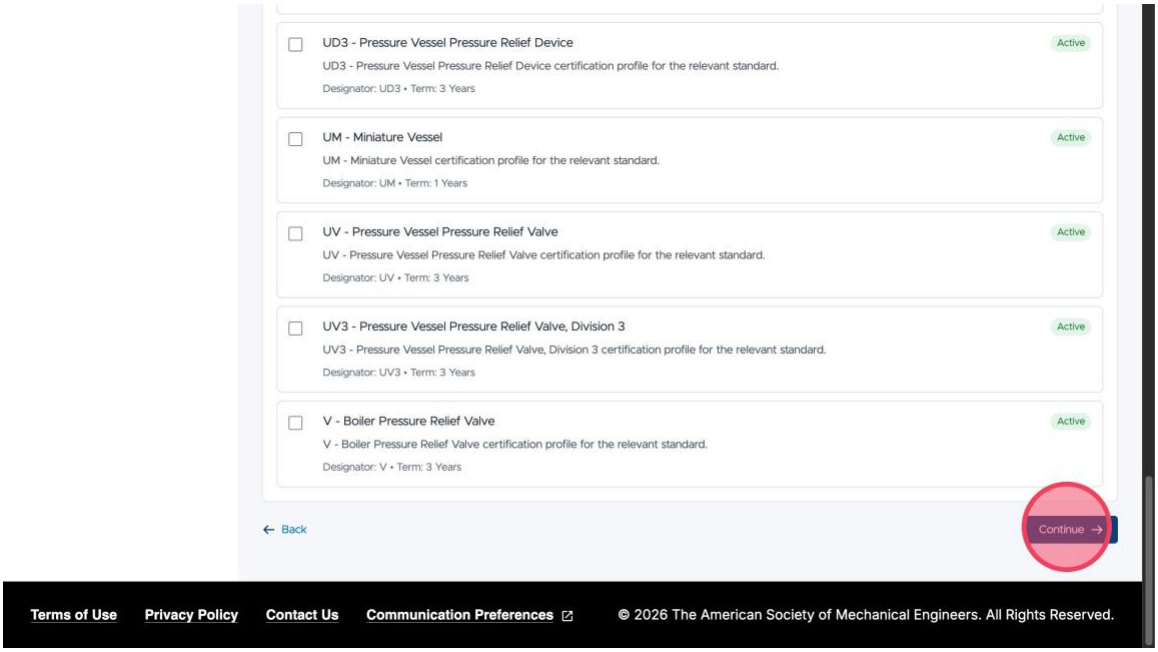
9. Once you have selected your program, you can choose which location your certification will apply to.



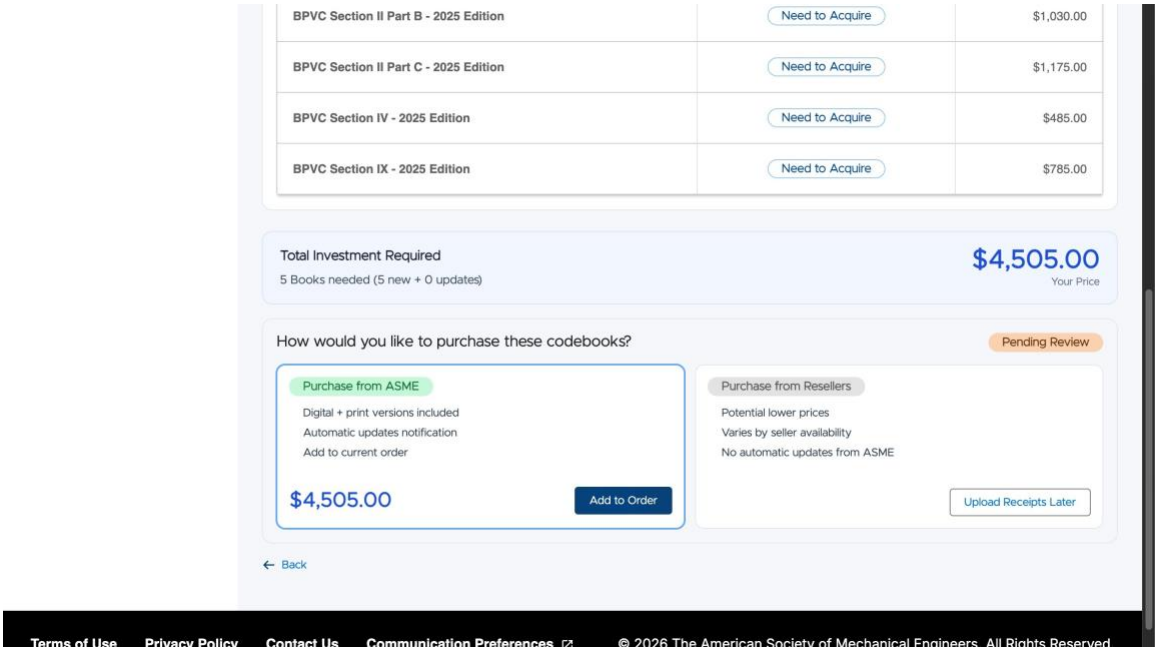
10. Select your desired certificates available for your program. Certificates/Designators are the specific authorization outcomes requested under the selected program, and later steps may ask for specific Scope, Additional Locations, AIA/Oversight information, and required codebooks.



11. Click "Continue"

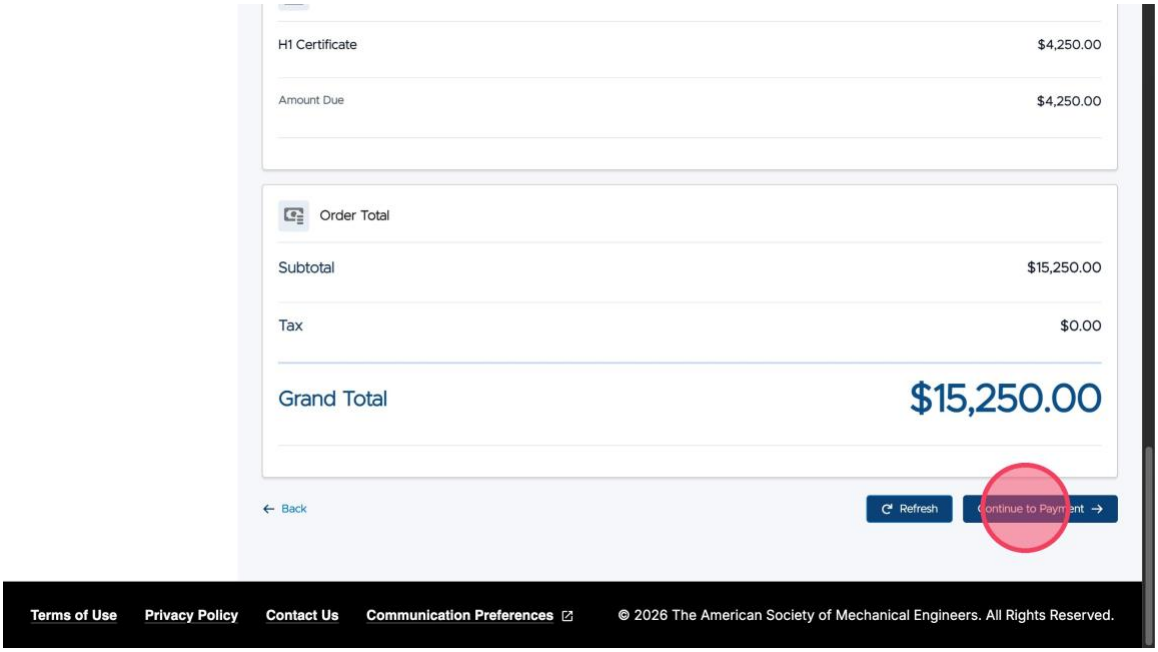


12. The system determines the required codebooks/standards based on what certificates have been selected in the previous step. You can purchase them from ASME or from a reseller. If you choose to purchase from a reseller, your purchase receipt will need to be verified by ASME Staff, and your application will enter a Review status before payment can proceed.

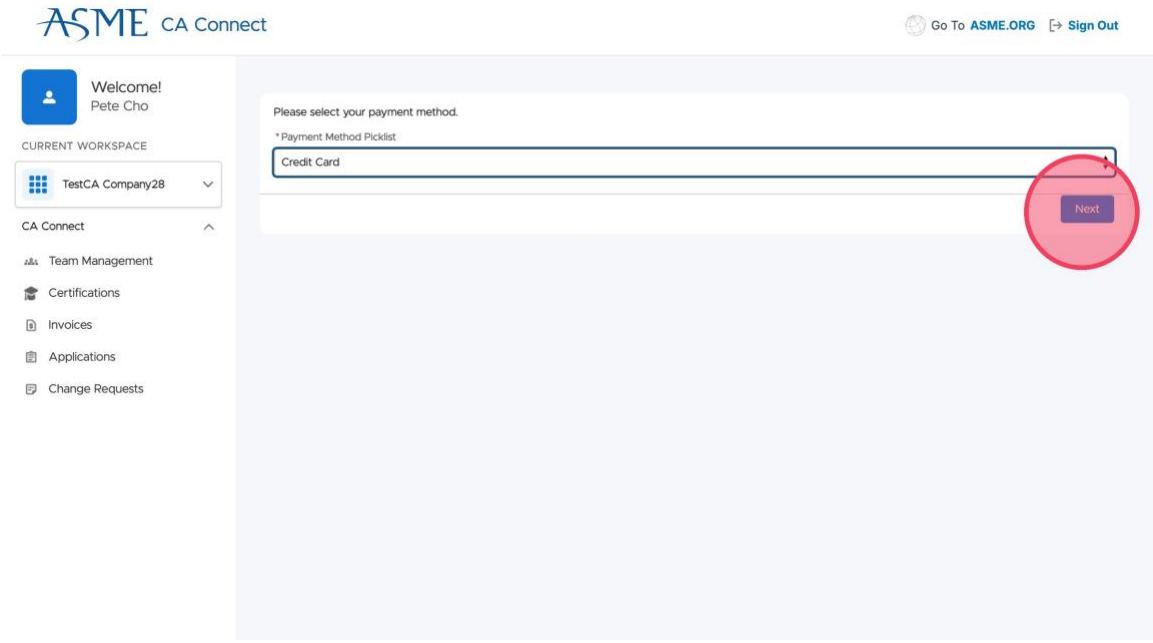


13. Review your entire application before selecting "Continue to Payment." You **must** complete the entire application, including the signed agreement. If any changes need to be made to your application, this is the time. It may take a minute or two for your order to generate, please be patient.

    ⚠ **NOTE: Once payment has been completed, your application is locked and changes can only be made by ASME staff. If you have any questions about your in-progress application before making payment, contact ASME Customer Care.**



14. Select your desired payment method and click "Next." Currently accepted payment methods are Credit Card and Bank Transfer. Transfer instructions are provided on screen. If you have any question about payments, please contact ASME Customer Care.



Bank Transfer Instructions

Pay by Bank Transfer (Wire Transfer)

This option lets you send a payment from your bank (online banking or at a local branch) using the bank details shown when you select next.

What you will receive

When you choose Bank Transfer, you'll be provided with a unique virtual bank account number (sometimes called a VBAN). This virtual account is assigned to you and can be reuse for future payments. Your bank transfer details may include:

- Your virtual bank account number (unique to you)
- Routing details (for example: ABA routing number or Swift code) Beneficiary (account holder) name and address
- Bank name and address

Regional bank details

The exact bank details shown can vary by country. Please use the specific account and routing information displayed on the next screen.

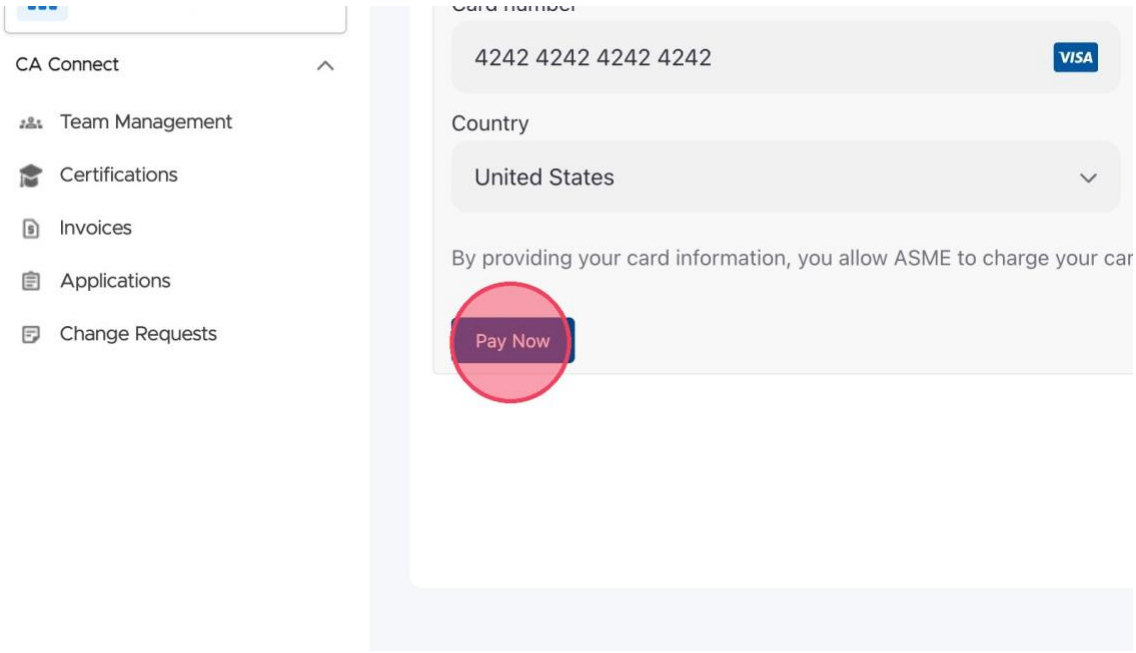
Helpful tips

- In your bank transfer, please pay the full invoice amount and include your invoice number in the reference/memo field (this helps us match your payment faster).
- Bank transfers are not instant-processing time varies by bank and country.
- Your bank may charge a fee for domestic or international wire transfers. If this fee is deducted from your payment, you may have an additional balance due.

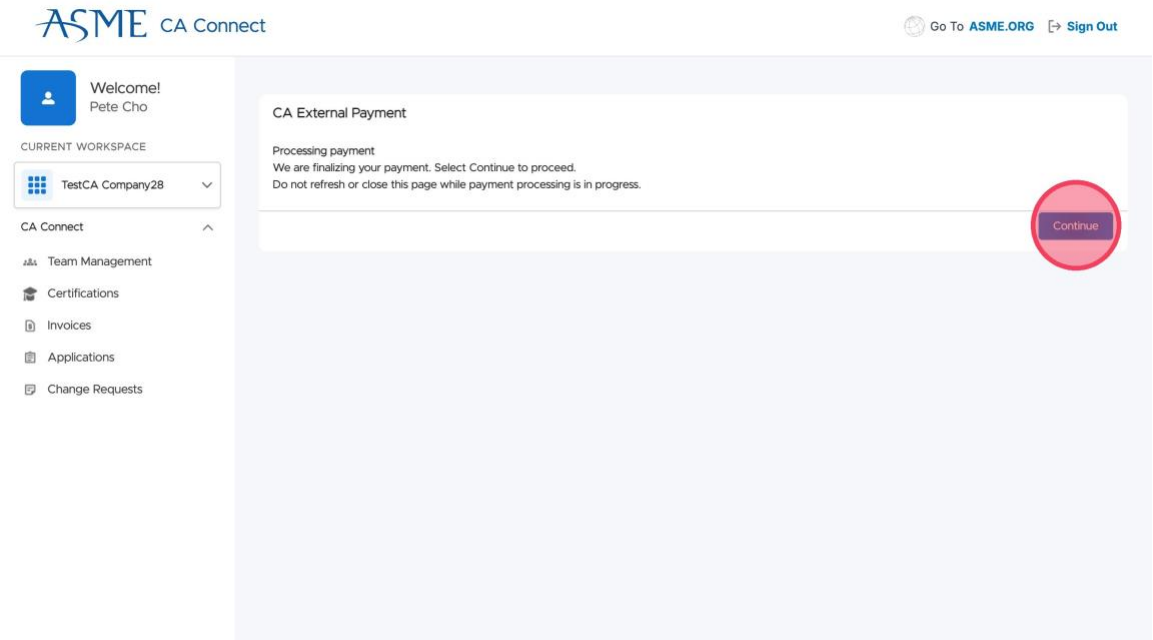
Once your funds arrive, the payment will be applied to the invoice number you provided with your payment. If we can't match it automatically, we will follow up if any additional information is needed.

Please contact AccountsReceivable@asme.org if you have any questions.

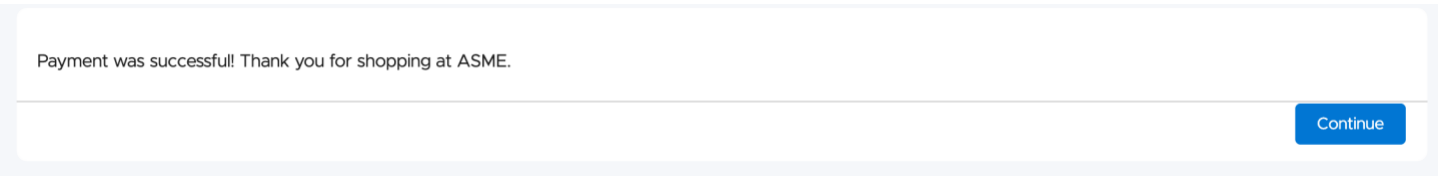
15. Enter your payment information and click "Pay Now."



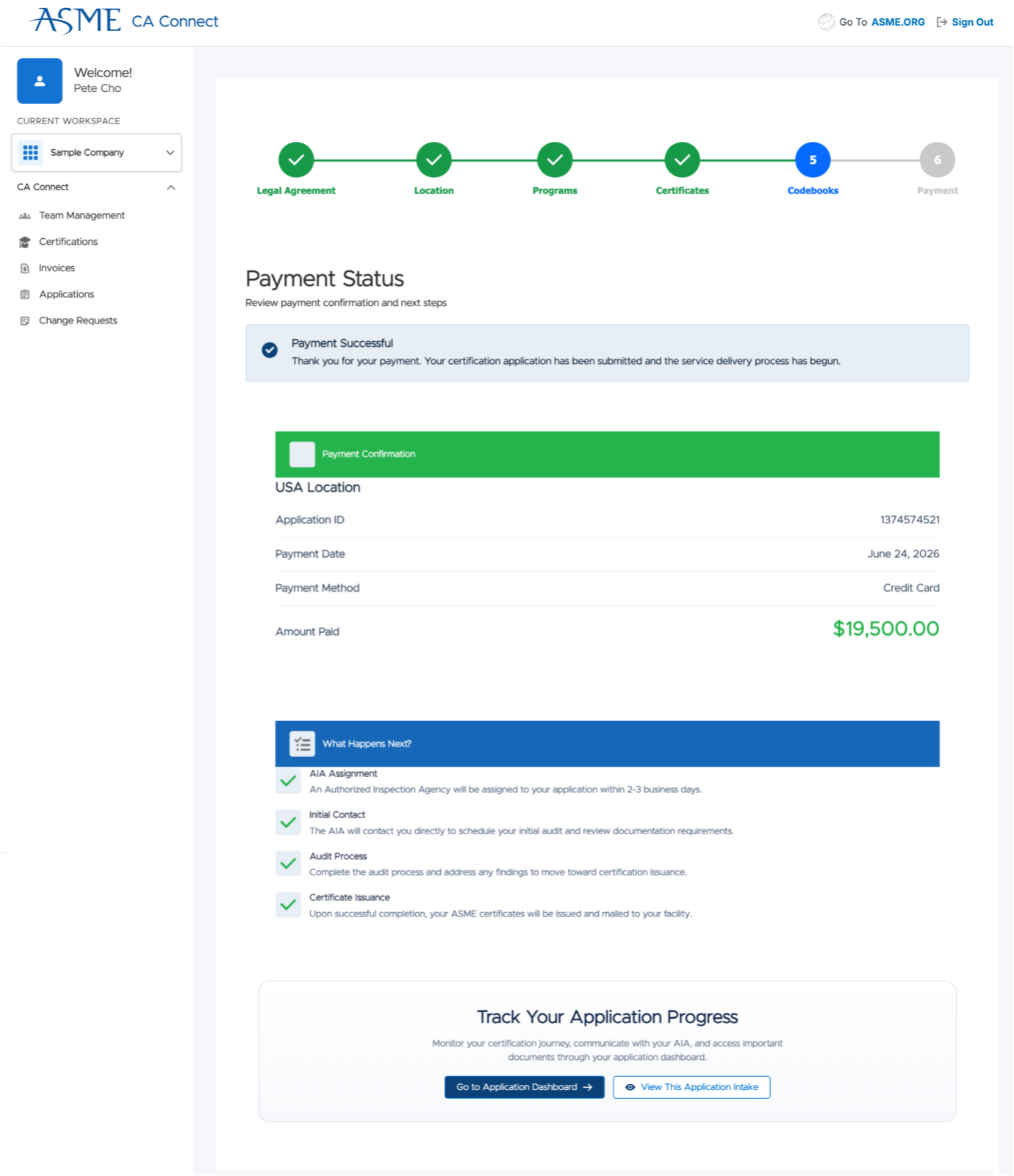
16. Click "Continue" to finalize the payment processing. ASME will need to verify and review the payment and confirm the payment transfer. The application advances only after ASME records the payment outcome.



17. The payment confirmation screen will appear. Select continue.



18. Your application has been submitted. You will be contacted for next steps.

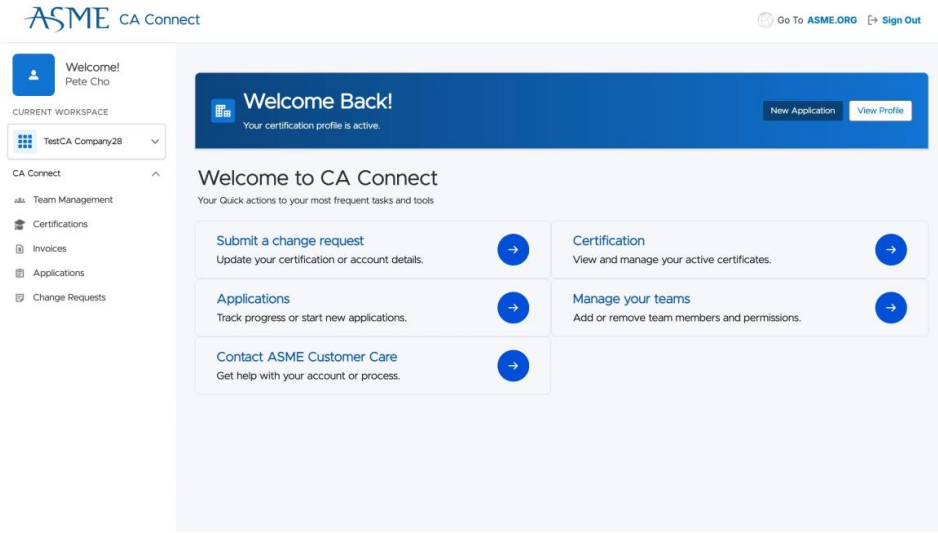


How to Submit a CA Connect Change Request

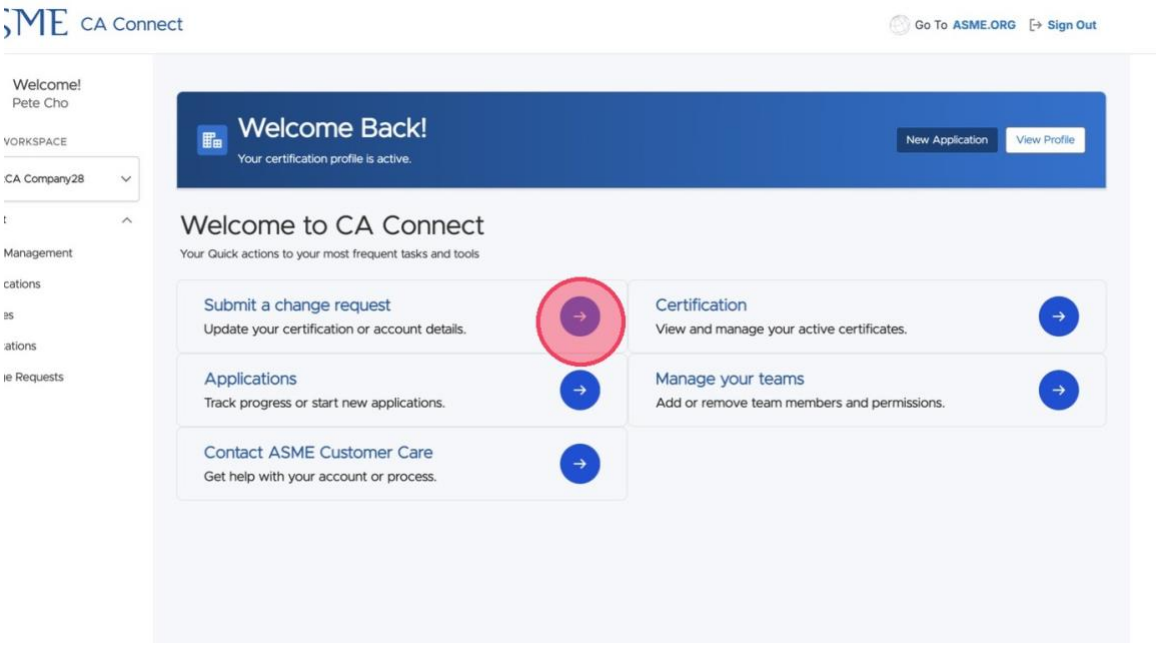
This guide walks you through the steps to submit a Change Request to an Application in the CA Connect portal. You must already have an ASME.org account and CA Connect access. To create an ASME.org account, please review the "Log In to CA Connect" guide.

⚠ **NOTE: Please create a Change Request for requesting updates to company information, previously issued Certifications, in progress Applications, uploading Code Book Proofs of Purchase, or other CA-related items. For any login or ASME.org account issues, please contact ASME Customer Care.**

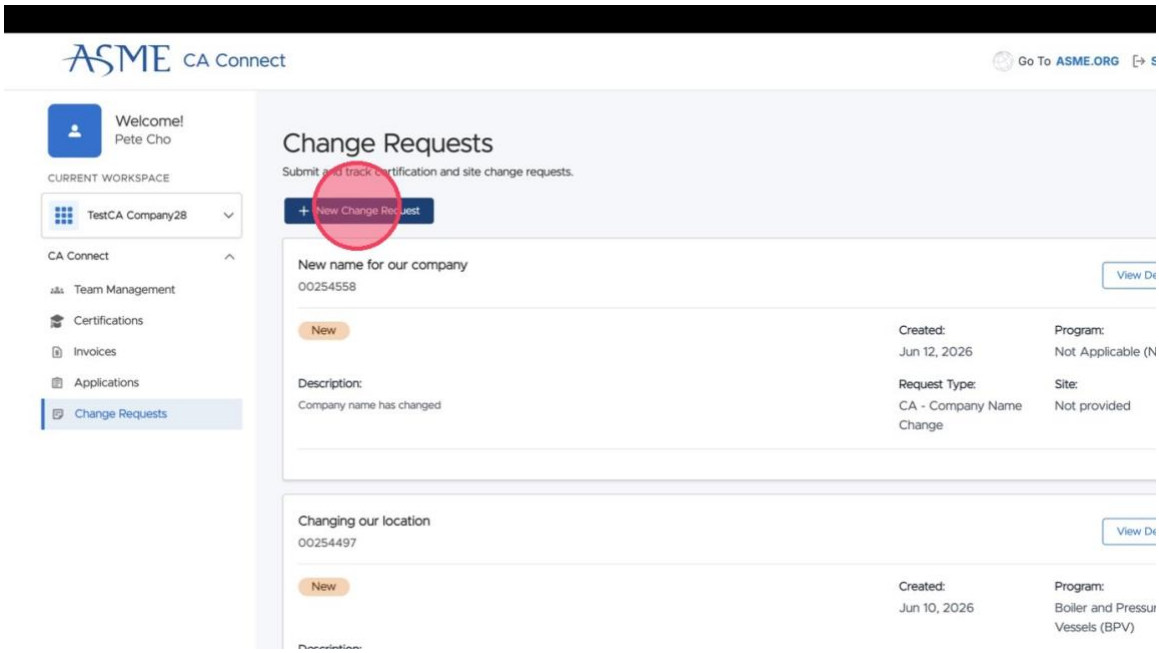
19. Navigate to the CA Connect home page. Ensure you are accessing the correct company workspace if you have access to more than one company.



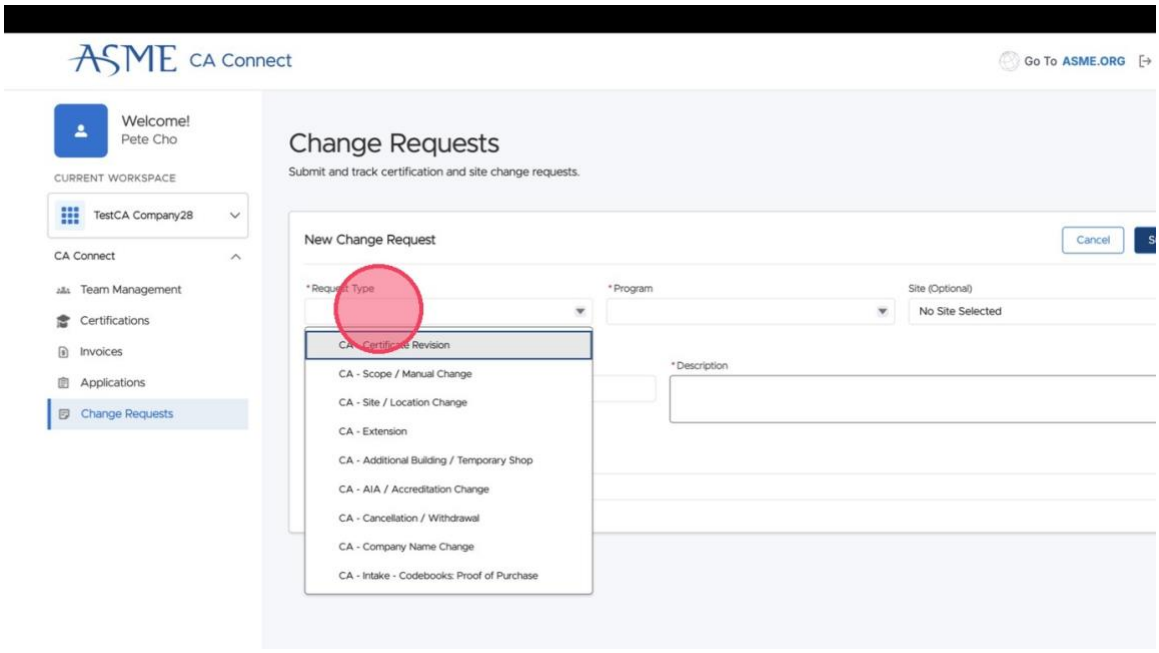
20. Select the "Submit a change request" link.



21. Click "+ New Change Request" and a new Change Request form will open.

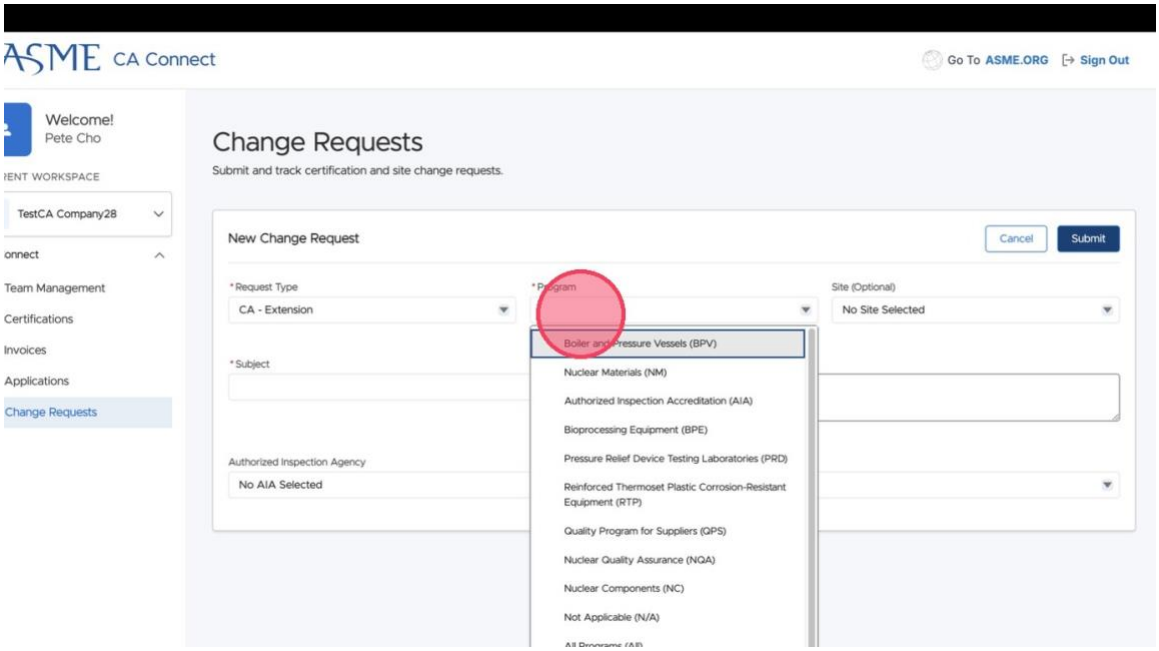


22. Select the appropriate Change Request Type for your situation. See below for a list of Change Request Types and what they mean.

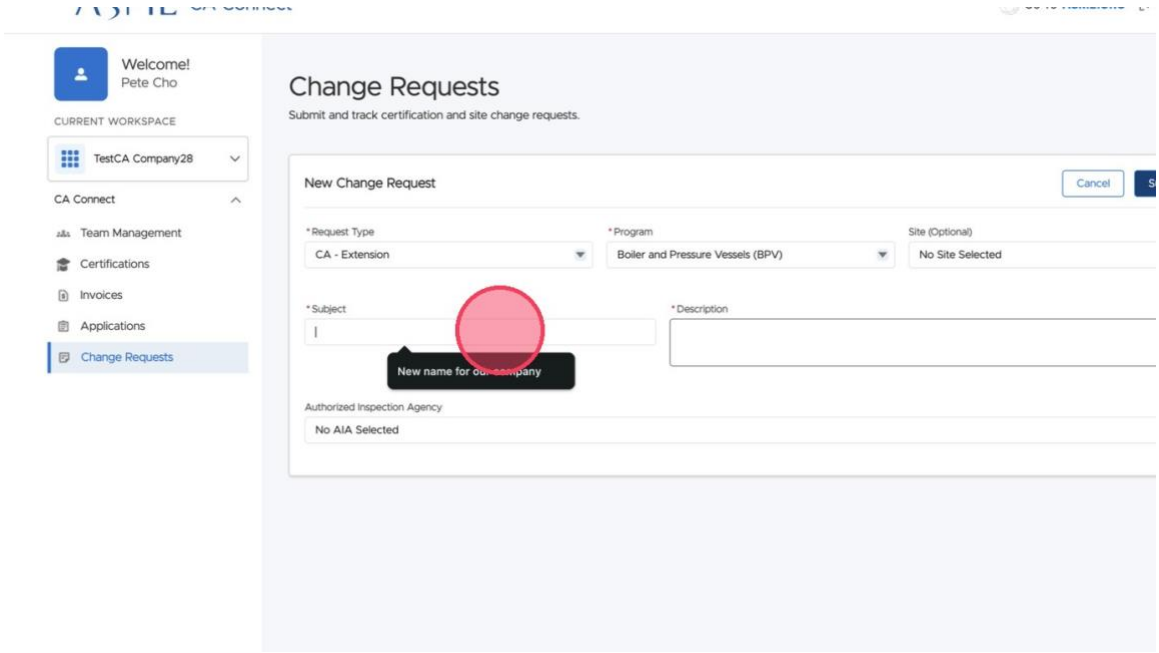


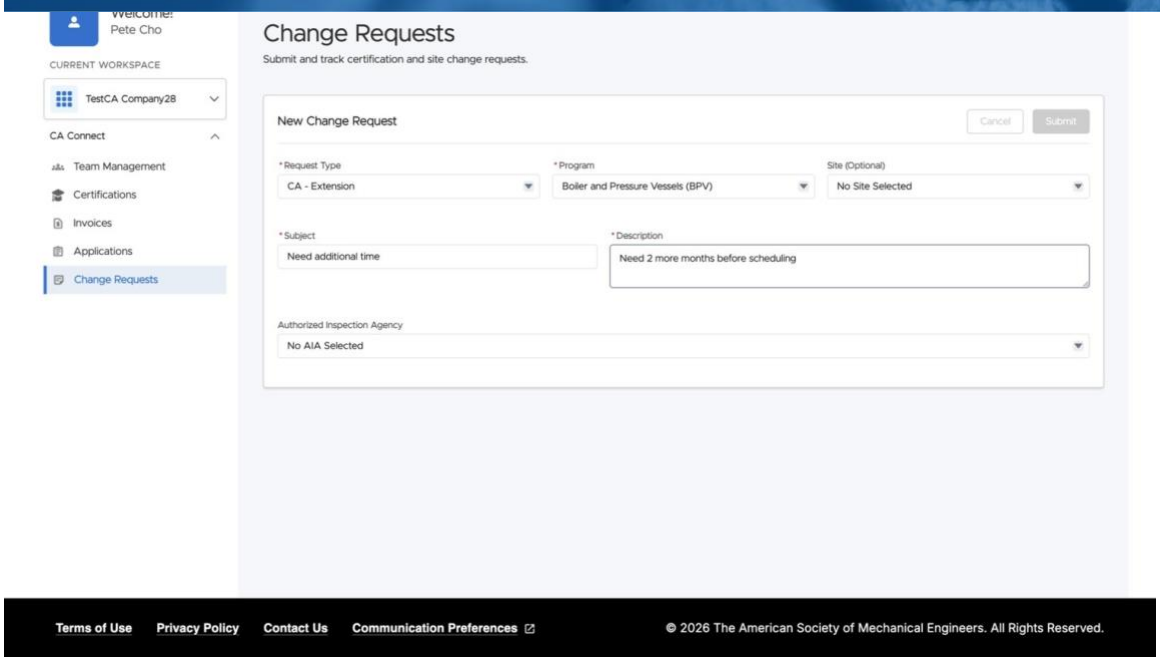
Change Request Type	Definition
Certificate Revision	Notify/Request ASME of a revision to your certificate
Scope / Manual Change	Notify ASME of a Scope change or a change in your manual
Site / Location Change	Notify ASME of another location where work is taking place or let ASME know if that location has changed
Extension	Request to extend your certification
Additional Building / Temporary Shop	Notify ASME about any work being done in an additional building/temp shop
AIA / Accreditation Change	Request to change AIA or accreditation
Cancellation / Withdrawal	Notify ASME about cancelling your review or withdrawing your application
Company Name Change	Request to Change Legal Company Name
Intake - Codebooks: Proof of Purchase	Notify ASME of code-book purchases made from another vendor

23. Select the appropriate Program from the dropdown for your Change Request Type. Some Change Requests apply to a single Program, some apply to All Programs, and some apply to none ("N/A"). If unsure, select "N/A." **Optional**: Select the related Site location for your Change Request, if applicable.

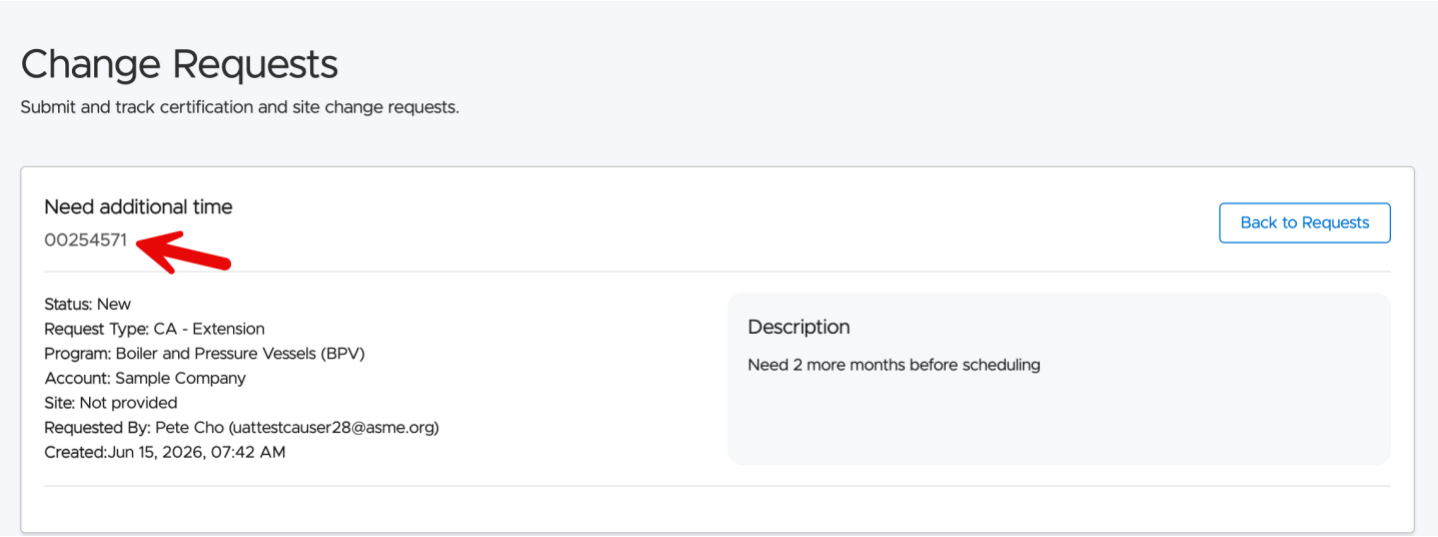


24. Enter the Subject and Description of your request. The Subject is a very short summary of your request or issue. There is a limit of 255 characters. The Description is a place for you to enter more detailed information.
⚠ **NOTE:** Include your certificate/application number if known, any affected facility/location, requested change, effective date(s), and any supporting context. Do *not* include any sensitive payment or password information.



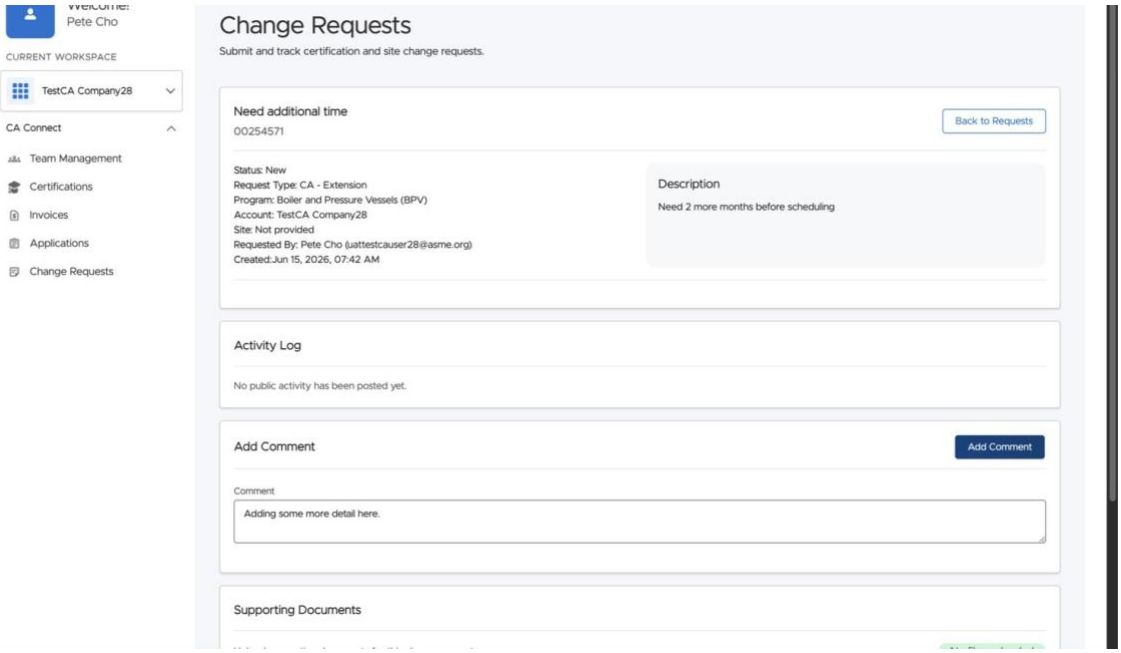


25. Click "Submit" to create your request. Once your request is submitted you will see your Request Number underneath the subject. You can refer to that number for any interaction with ASME Customer Care.



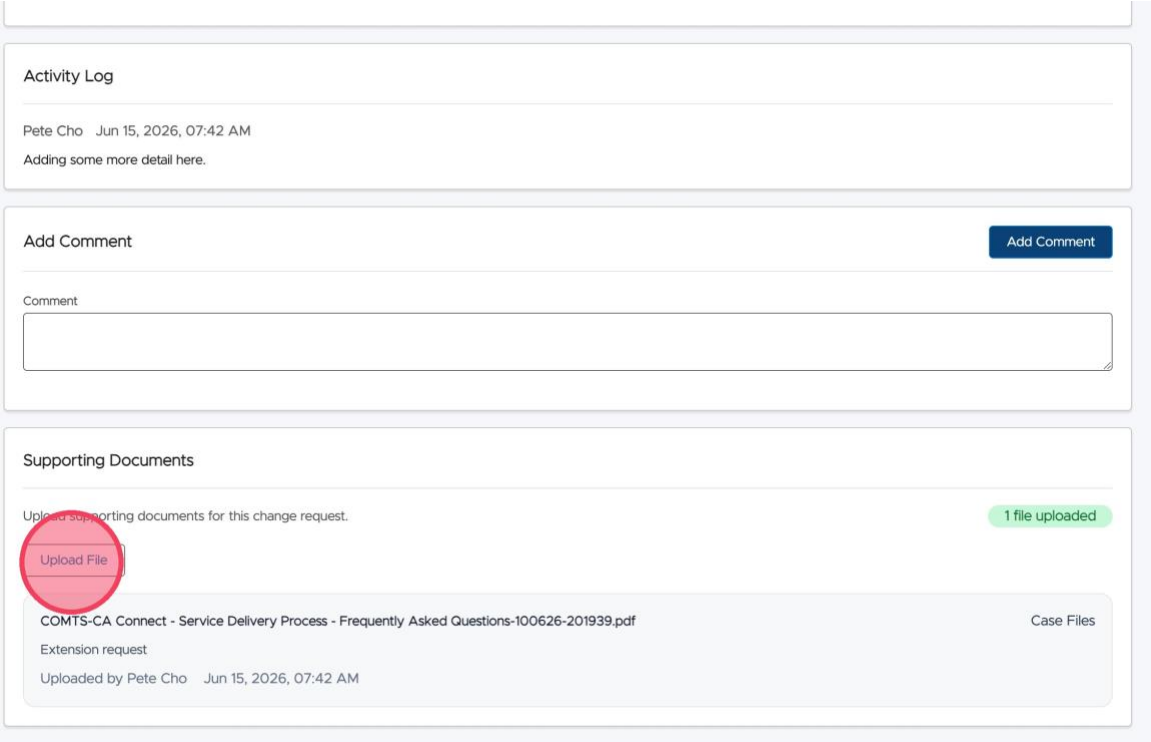
26. Once your request has been submitted, you will have the ability to add Comments or Upload Files as needed, and ASME Staff will review or request additional information as needed.

    ⚠ **NOTE: ASME Staff will use Comments to provide feedback and update you on the status of your request. You will be notified by email of any updates, and you can login to review the comments and provide any supporting information or documents as needed.**

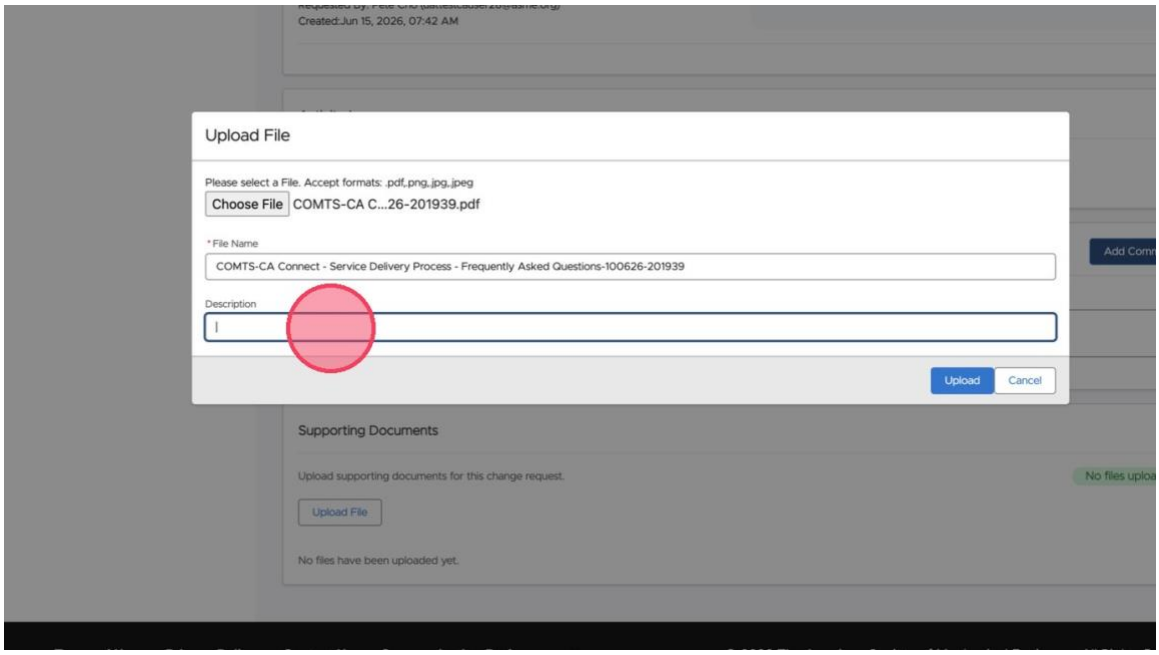


27. If uploading supporting documents, click the “Upload File” button and select a local file.

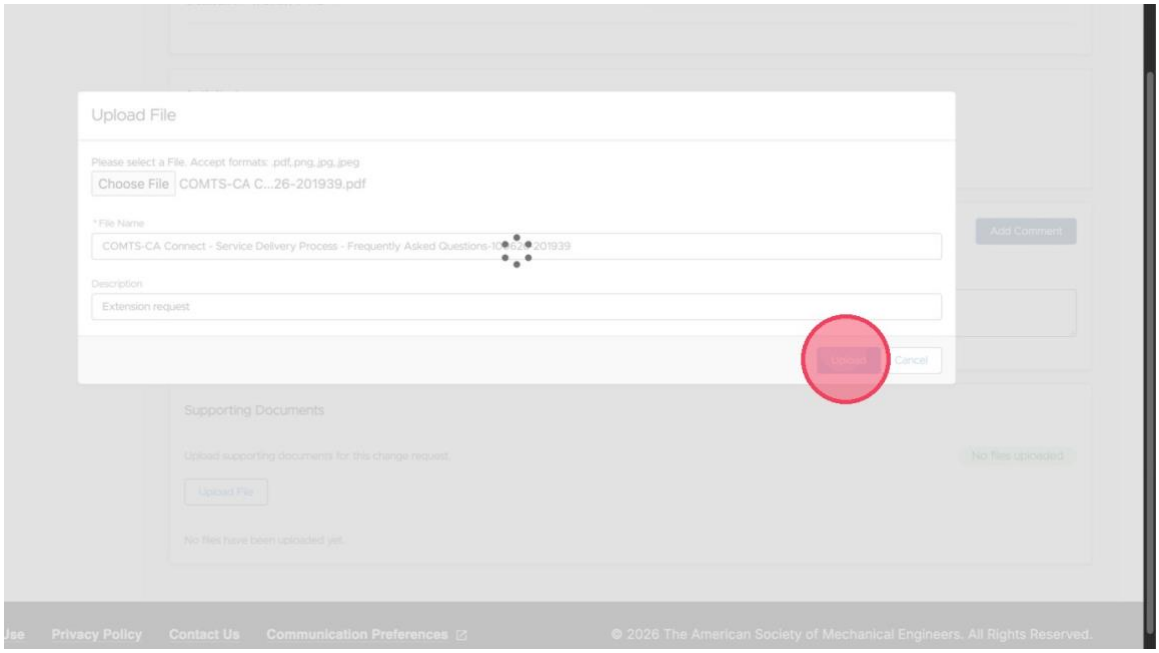
⚠ **NOTE: File size upload is limited to 2GB.**



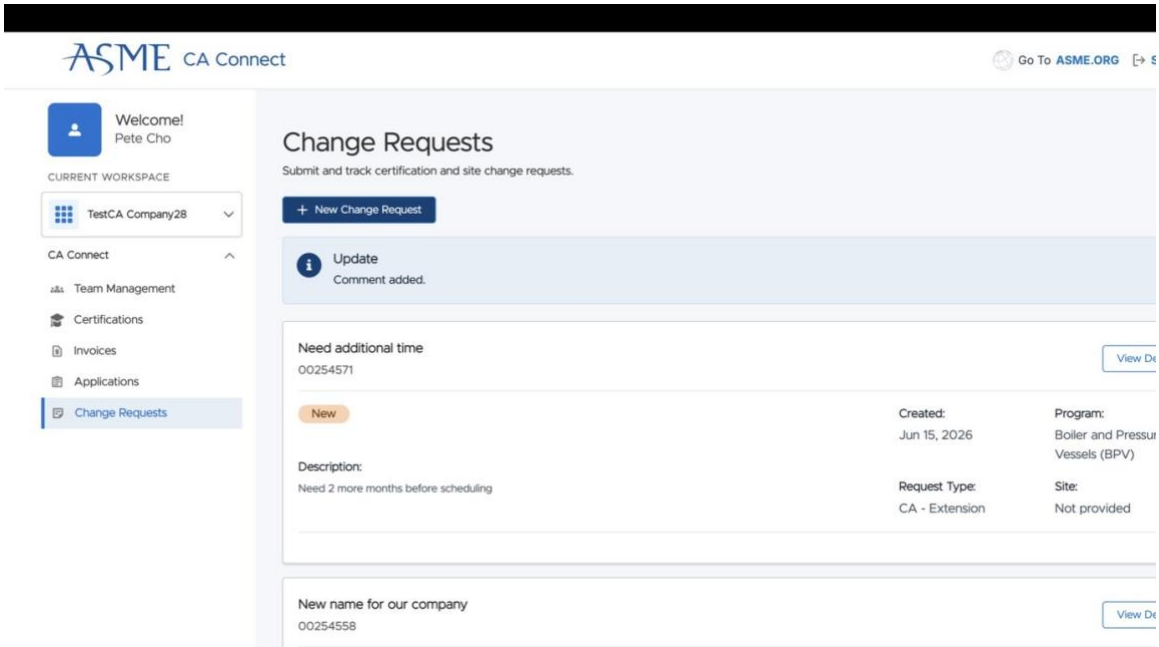
28. Select a file on your computer to upload.
29. Enter a short description of the uploaded file, which will assist ASME staff in completing your change request. The file name will be populated automatically. Example description: “Proof of Purchase of Complete ASME 2025 BPVC”



30. Click "Upload" and after the upload is completed, a confirmation will appear. If the upload fails for any reason, please try again, or reach out directly to ASME Customer Care with the Change Request number shown in the list.



31. Navigate back to "Change Requests" list to see all Change Requests, their Request number, Status, Submitted Date, and next action. If charges may apply after ASME review, pyment is only requested after changes are finalized.



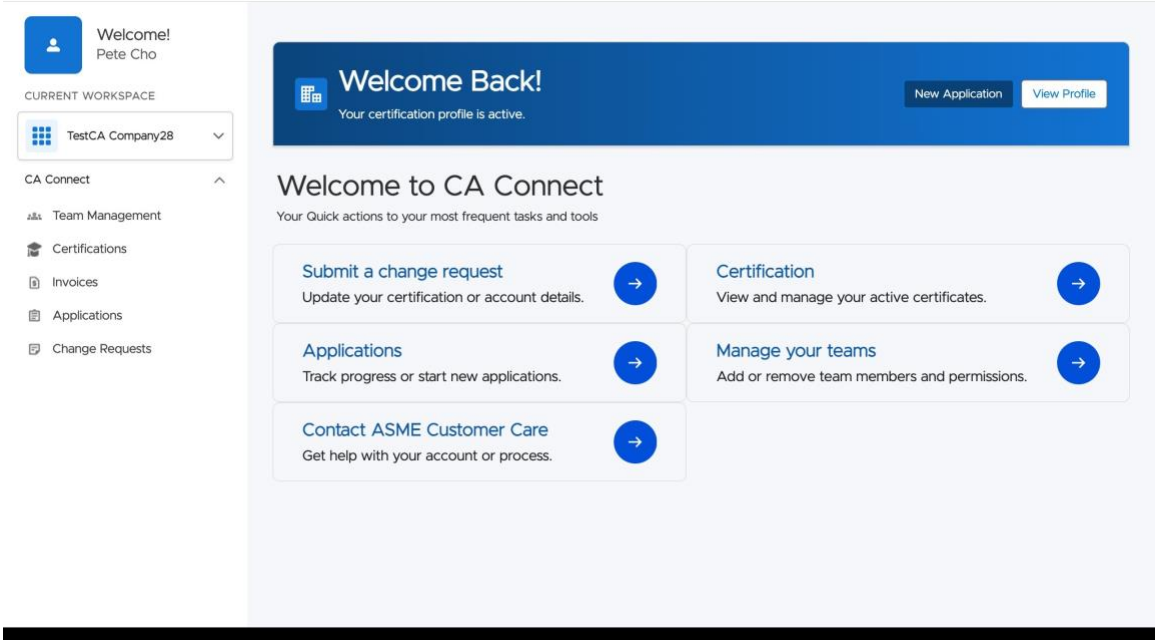
ASME® | CA Connect

Quick Reference Guide

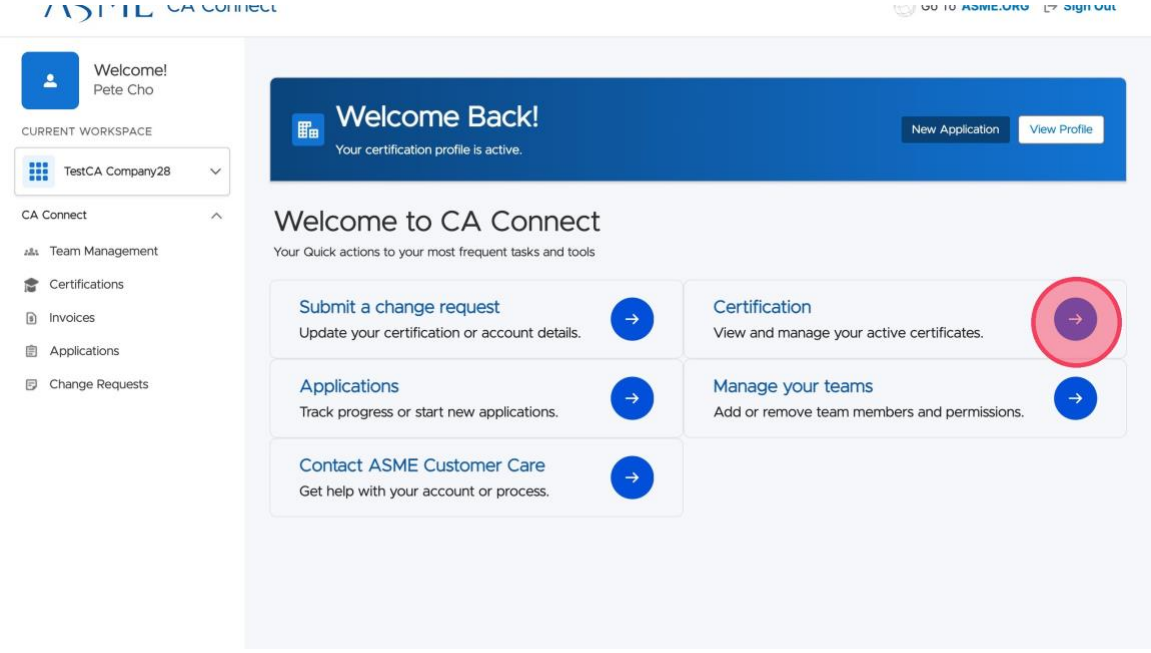
How to View and Download Your ASME Certification

This guide walks you through the process to access your ASME Conformity Assessment Certification. You must already have an ASME.org account and CA Connect access. To create an ASME.org account, please review the "Log In to CA Connect" guide.

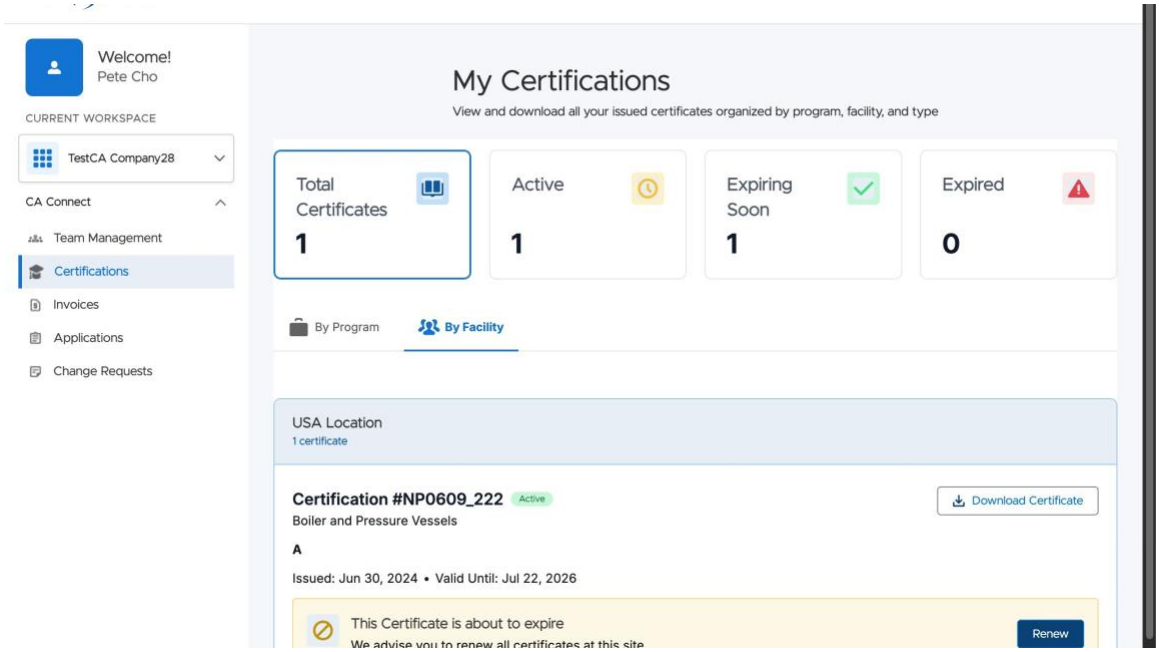
1. Navigate to the CA Connect home page. Ensure you are accessing the correct company workspace if you have access to more than one company.



2. Click "Certification" from the main page to navigate to your certifications.

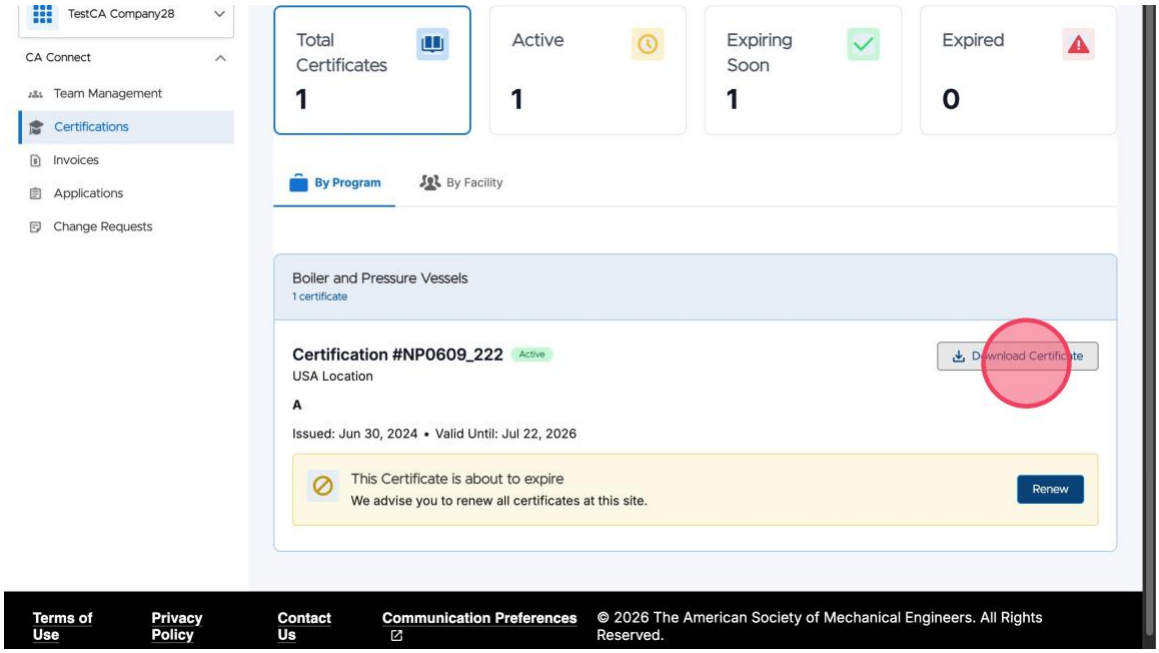


3. You can see all your certifications listed by program or by facility location.



Status	Definition
Active	Currently active Certification for that Program/Facility
Expiring Soon	Certification will expire within 9 months of the current date
Expired	Certification has expired

4. Click "Download Certificate" to get a PDF of your certification. If you are unable to download your certification, or if you get an error, please contact ASME Customer Care.



5. Review your certification. If ANY information on your certification is incorrect or needs updating, please submit a Change Request. You can use the “Submit a Change Request” guide for instructions on how to do this.

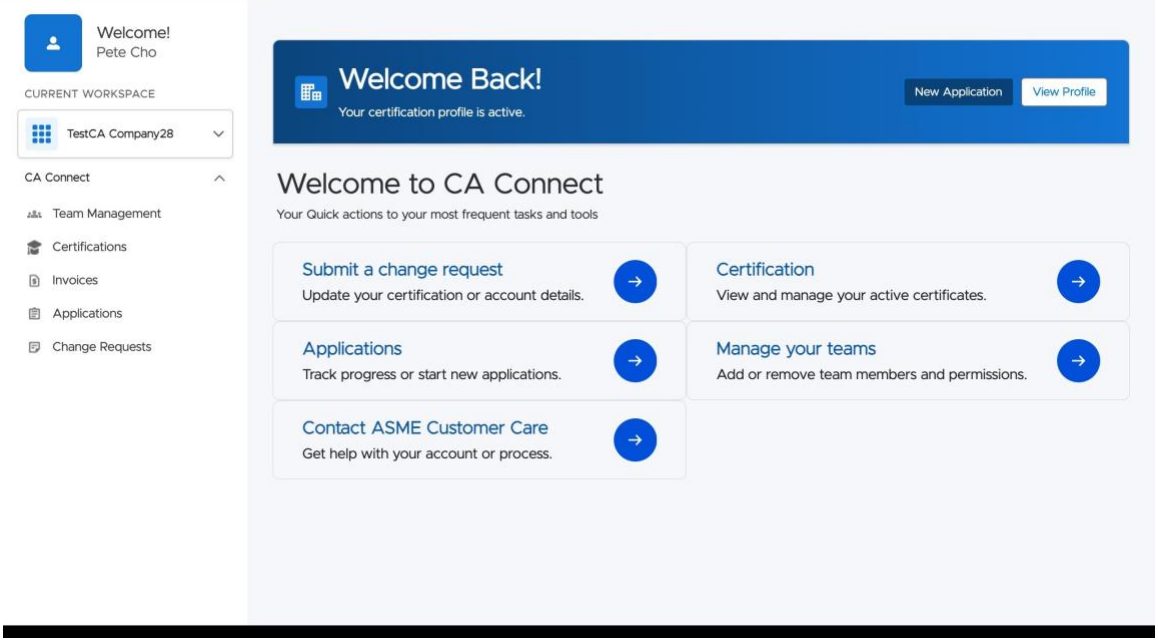
ASME® | CA Connect

Quick Reference Guide

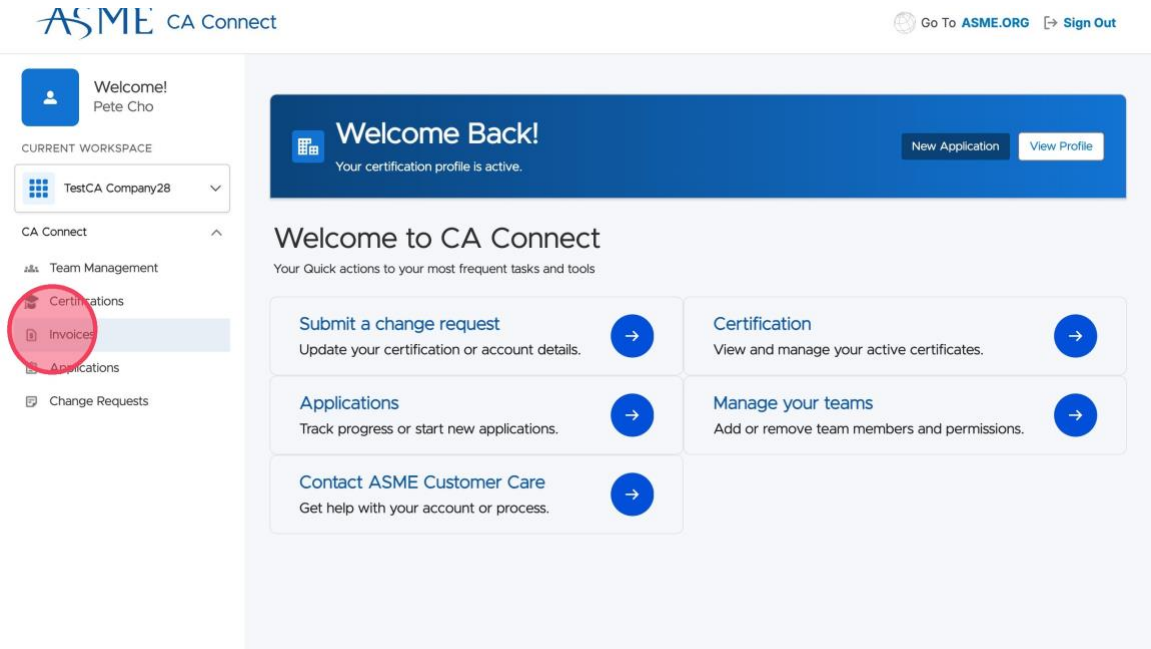
How To View Your CA Connect Invoices

This guide walks you through the process to access your ASME Conformity Assessment Invoices. You must already have an ASME.org account and CA Connect access. To create an ASME.org account, please review the "Log In to CA Connect" guide.

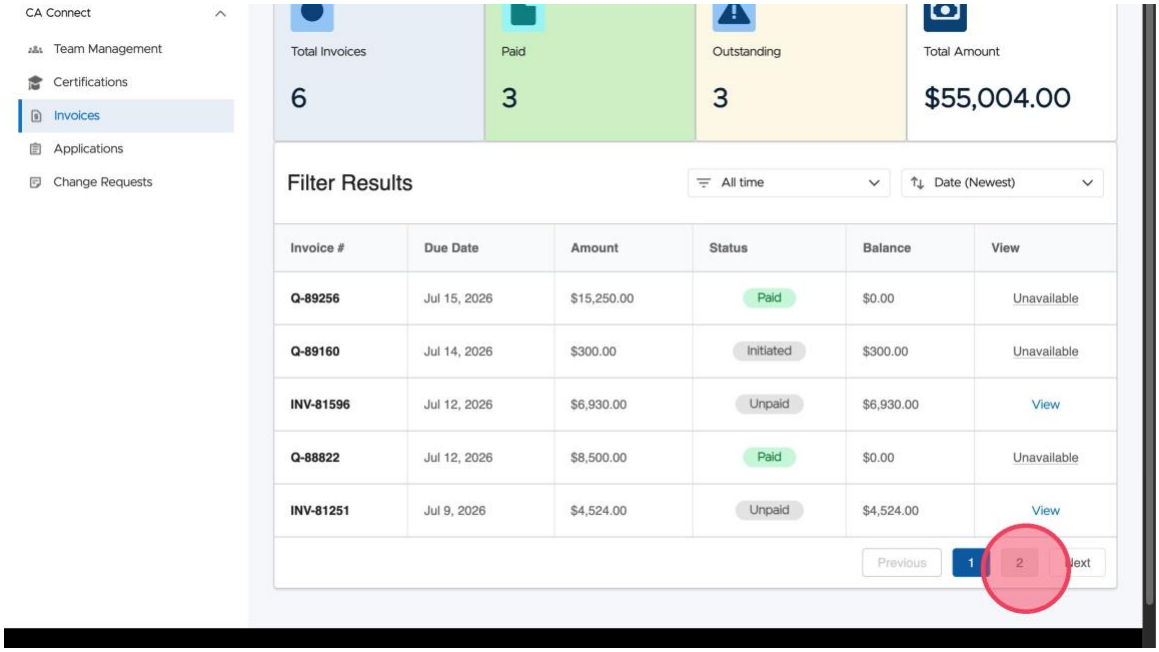
1. Navigate to the CA Connect home page.



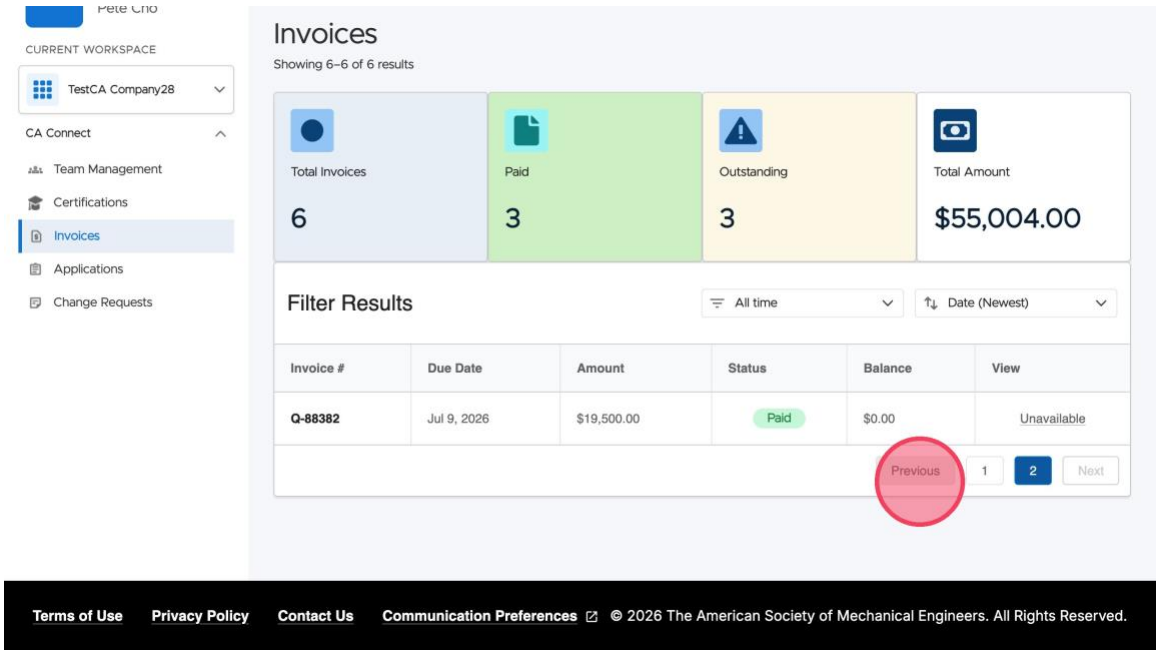
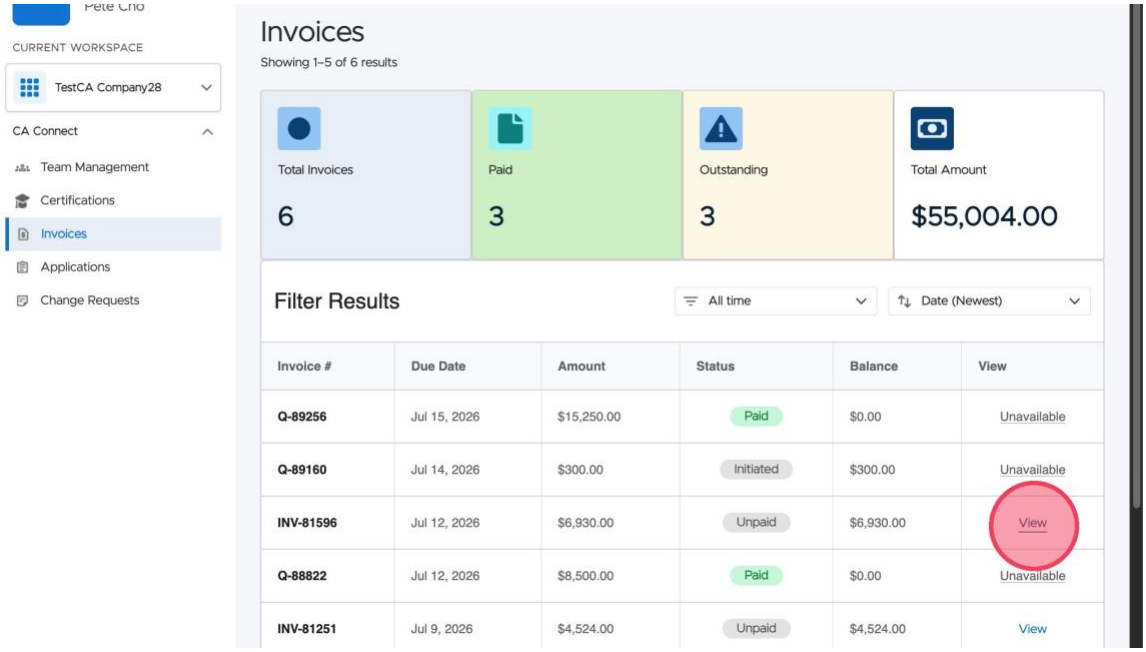
2. Select Invoices from the sidebar.



3. Review your list of invoices sorted newest to oldest. If needed, go to the next page.



4. Click Previous to return to the first page.



5. Click View to open the invoice details and pay the invoice if needed.