



ASME Conformity  
Assessment  
CA Connect BPE  
(Bioprocessing Equipment)  
New & Renewal

# BPE Program – New Application



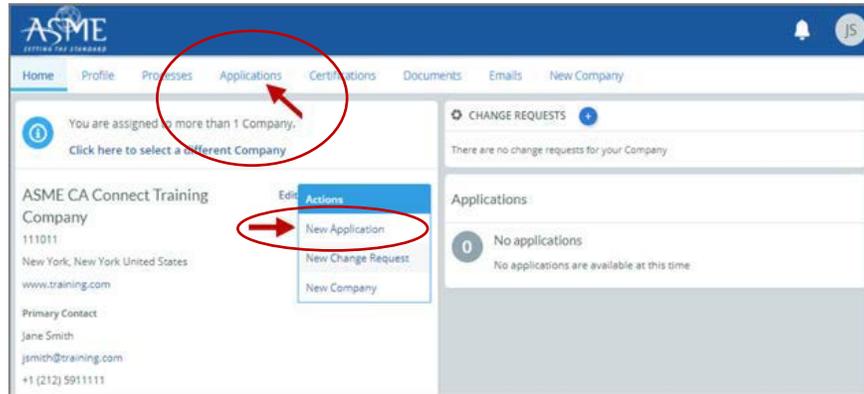
The information required to complete and submit an application for certification/ accreditation is grouped and divided into multiple tabs and steps.

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.



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.



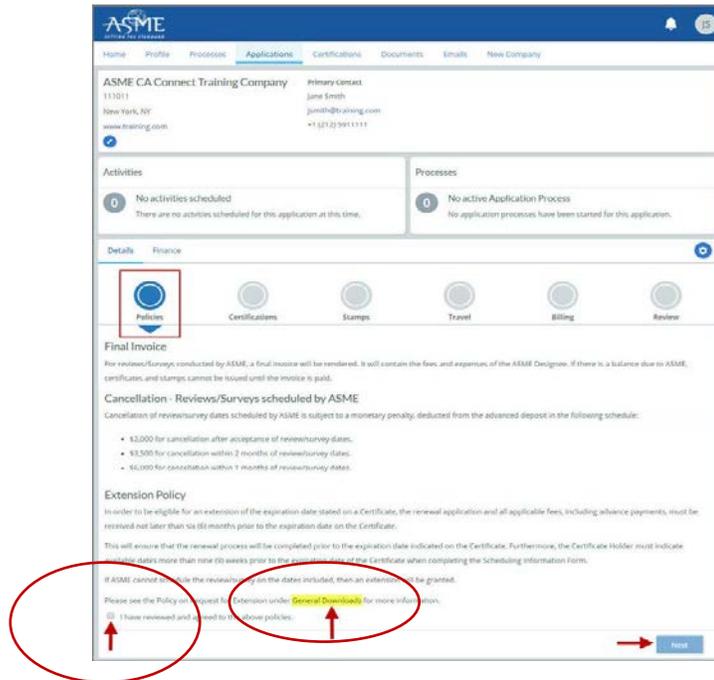
4. The first Application tab is the **Policies** tab. Review all information.
5. Scroll down the page to the **Extension Policy** section.



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.

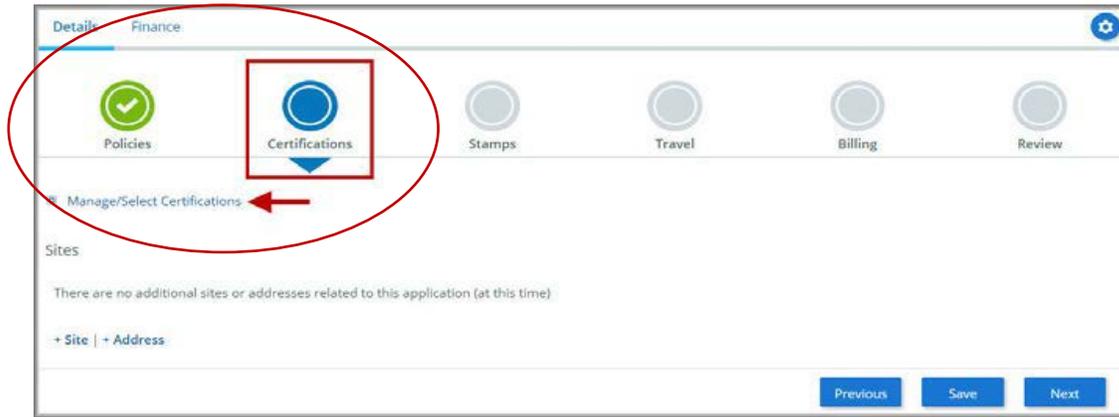
7. Check **I have reviewed and agreed to the above policies** checkbox.



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.

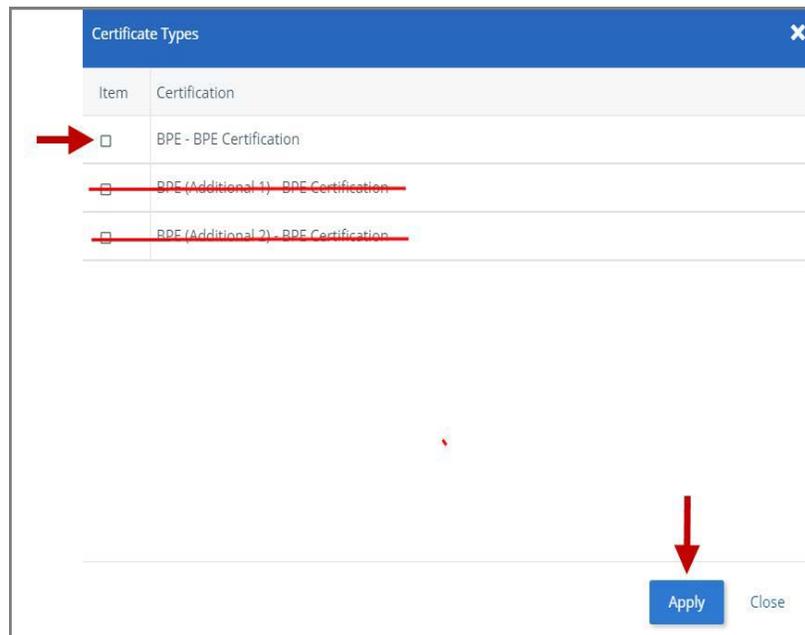




10. The Certificate Types form is displayed. Select the **Boiler** certificate type associated with the certificate you are renewing.

11. If you are applying for a **new certificate** as well, select the new certificate type.

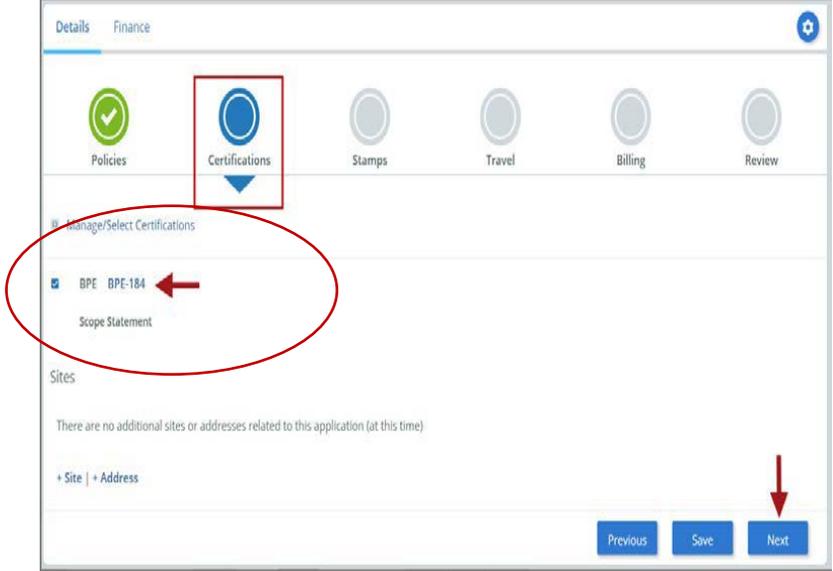
12. When done, click **Apply** to continue.



13. The Certificate Types is displayed. Select the BPE Certificate Type.

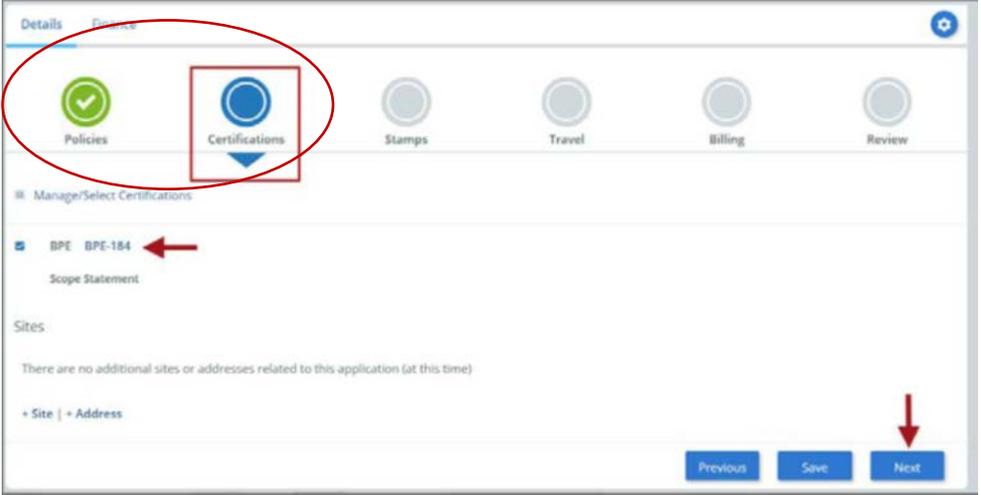
14. When done, click Apply to continue.





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

Program Type  
BPE

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



The screenshot shows a software interface with a top navigation bar containing 'Details' and 'Finance'. Below this is a row of 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	Not Complete

A red arrow points to the company name in the table. Below the table is an 'Add New Location' button and two 'Previous' and 'Next' buttons.



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
	<input checked="" type="checkbox"/> Use Valid USPS Address	



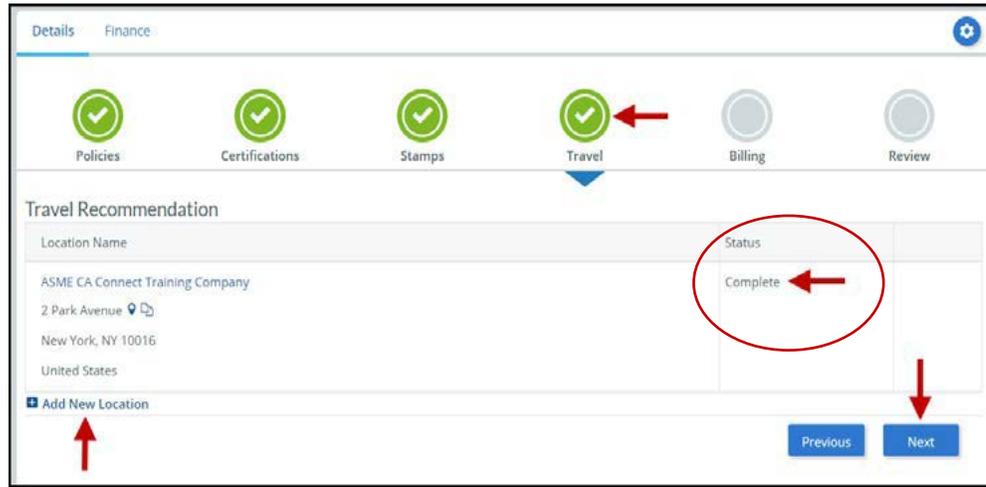
35. You will be redirected back to the **Travel tab**. Confirm that the **Status** shows as **Complete** and that the Travel tab is green and includes a checkmark.

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.

A screenshot of the ASME Billing form interface. At the top, there are tabs for 'Details' and 'Finance'. Below these are six circular icons representing different sections: Policies, Certifications, Stamps, Travel, Billing, and Review. The 'Billing' icon is highlighted with a red square and a downward arrow. The main content area is titled 'Billing' and contains a sub-section 'Company Banking Details' which is circled in red. A red arrow points to the 'Company Banking Details' heading. Below this heading are several input fields for banking information: Bank Account Name / Beneficiary, ABA Routing Number, Billing Contact Email, Account Number / IBAN #, SWIFT Code / BIC, and Bank Transit Number. At the bottom of the form, there is a link for the 'Credit Card Processing Form' with a PDF icon, also highlighted with a red arrow. At the very bottom, there are three buttons: 'Previous', 'Save', and 'Next', with a red arrow pointing to 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.

A screenshot of the ASME application interface. At the top, there are two tabs: 'Details' and 'Finance'. Below the tabs is a navigation bar with six icons: Policies, Certifications, Stamps, Travel, Billing, and Review. The Review icon is highlighted with a red box. Below the navigation bar, there is a section titled 'Please confirm availability dates' with a red circle around the 'View More' link. Below this section, there are two main input areas: 'Earliest Date' and 'Dates Unavailable Add Dates'. The 'Earliest Date' section has a text input field with a red arrow pointing to it. The 'Dates Unavailable Add Dates' section has a table with columns for 'Start Date', 'End Date', and 'Remove'. There are red arrows pointing to the 'Start Date' and 'End Date' input fields. At the bottom, there is a 'Sister Locations' section with a text input field.

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.



Please review the details of your application

<b>Travel</b> edit ←			
<b>Division Information</b>	<b>Hotel Information</b>	<b>Airport Information</b>	<b>Emergency Contact</b>
1 Park Ave 📍	Marriott	JFK	Marc Anthony
New York, NY 10016	475 Park Avenue 📍	Queens	Phone: +1 (212) 5911234
United States	New York, NY 10016	Miles From Airport To Hotel: 10	
	United States		
	Miles from Hotel to Site: 10		
	Phone: +1 (212) 2021234		

**Billing** edit ←

Credit Card Processing Form  
pdf Credit Card Processing Form



Please review the details of your application

<p>Travel <a href="#">edit</a> ←</p> <p>Division Information</p> <p>1 Park Ave 📍</p> <p>New York, NY 10016</p> <p>United States</p>	<p>Hotel Information</p> <p>Marriott</p> <p>475 Park Avenue 📍</p> <p>New York, NY 10016</p> <p>United States</p> <p>Miles from Hotel to Site: 10</p> <p>Phone: +1 (212) 2021234</p>	<p>Airport Information</p> <p>JFK</p> <p>Queens</p> <p>Miles From Airport To Hotel: 10</p>	<p>Emergency Contact</p> <p>Marc Anthony</p> <p>Phone: +1 (212) 5911234</p>
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Billing [edit](#) ←

Credit Card Processing Form

 Credit Card Processing Form



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. your local computer and upload the file.

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

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

55. Click **Save** to continue.



<b>Banking Details</b>	<b>Billing Address</b>
Bank Name:	1 Park Ave
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Conbox	
Contact/Attention Email:	

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.



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.



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				



56. 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**.













