

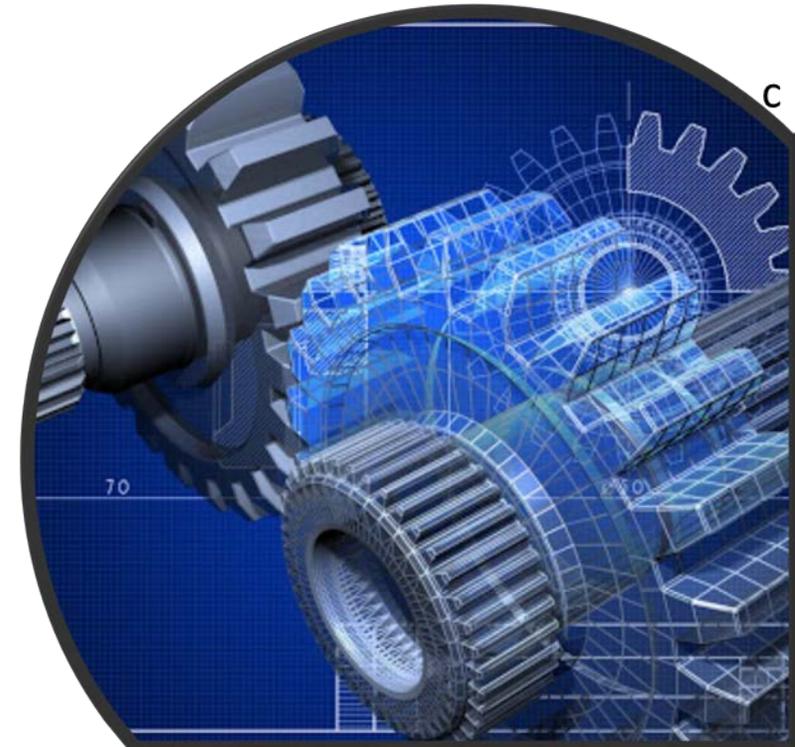


ASME Conformity
Assessment
PRD Program



PRD Program – Renewal and New Observer Application

The information required to process information and apply 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 apply, 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 Training Company dashboard. At the top, there is a navigation bar with tabs for Home, Profile, Processes, Applications, Certifications, Documents, Emails, and New Company. A notification icon and a user profile icon (MT) are visible in the top right corner.

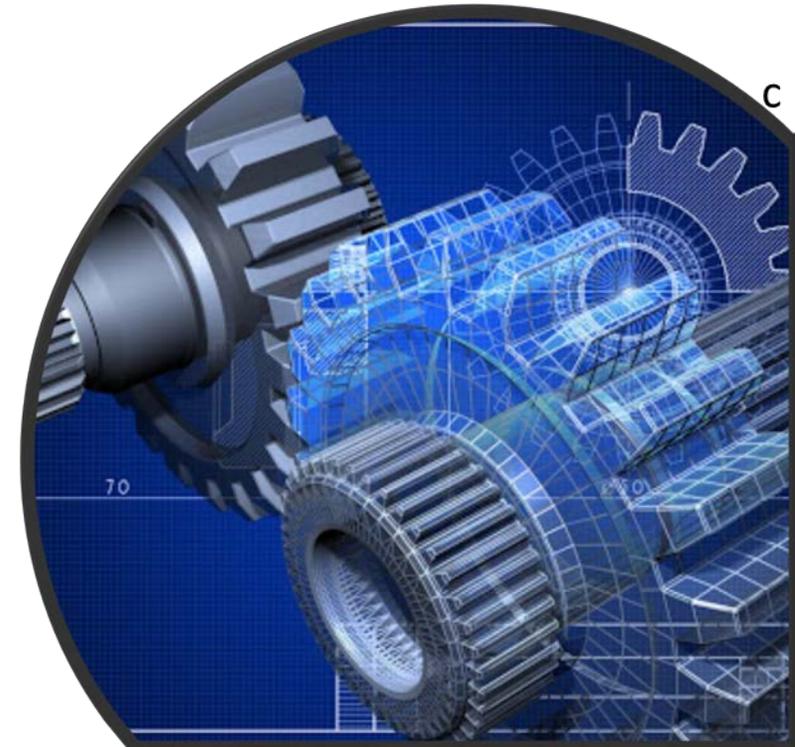
Below the navigation bar, a message states: "You are assigned to more than 1 Company. Click here to select a different Company".

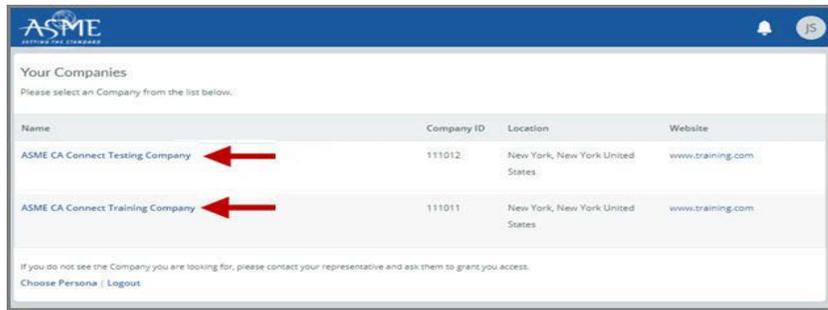
The main content area is divided into several sections:

- Company Information:** ASME CA Connect Training Company, ID: 109842, Location: New York, New York United States. Primary Contact: Myrnatost Troiano, myrnaasme7@gmail.com.
- CHANGE REQUESTS:** A section with a plus icon and a message: "There are no change requests for your Company".
- Applications:** A table with columns: Type, Status, and Activities. One application is listed: Application: FAB-130231, Type: Nuclear, Status: Submitted, Submitted: 06/17/2019. A circular icon with the number 0 is next to the Submitted status.
- Certifications:** A table with columns: Certification Type, Status, Effective, and Expires. Two certifications are listed:

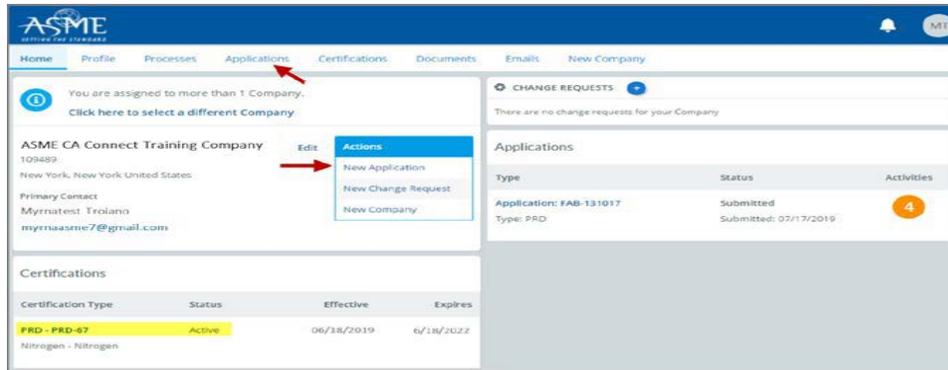
Certification Type	Status	Effective	Expires
N (Additional 1) - N-4788 scope sitexxxxxx	Active	06/18/2019	06/24/2019
N - N-4787 scope entered for nuclear corporate	Active	06/18/2019	06/21/2019

- 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.

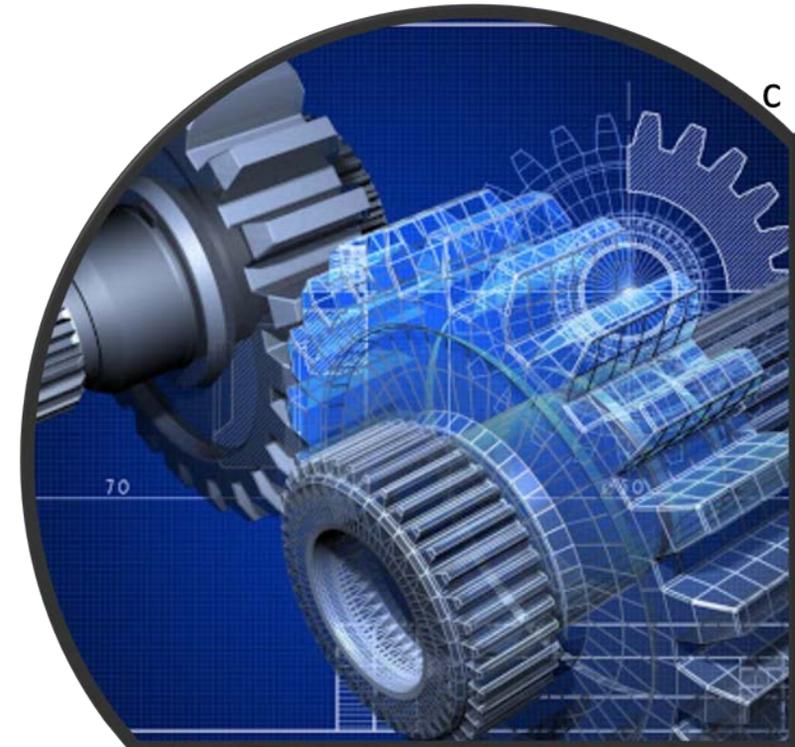
6. Scroll down the page to the **Extension Policy** section.

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.

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
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.

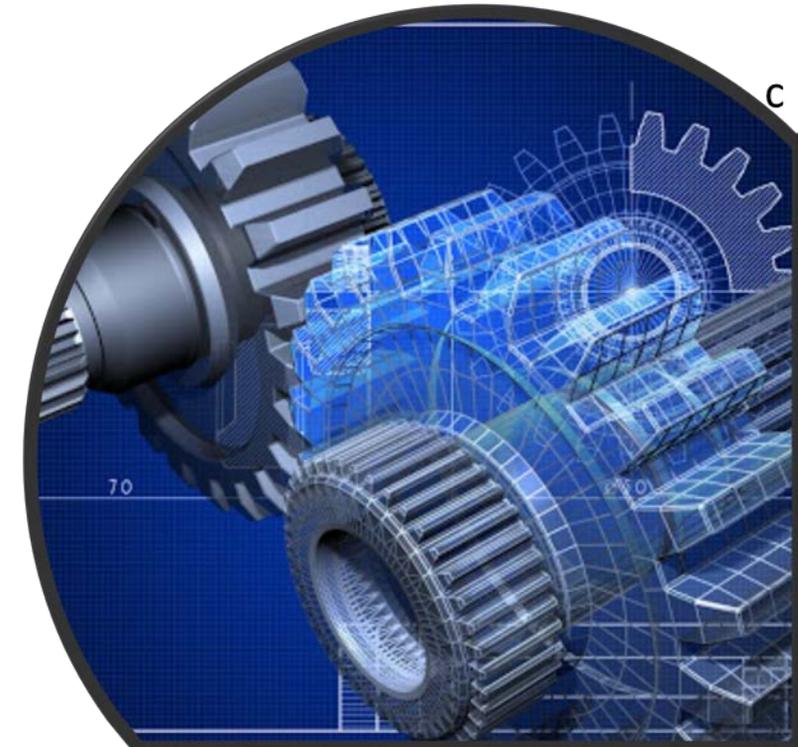
This will ensure that the renewal process will be completed prior to the expiration date indicated on the Certificate. Furthermore, the Certificate Holder must indicate available dates more than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling Information Form.

If ASME cannot schedule the review/survey on the dates included, then an extension will be granted.

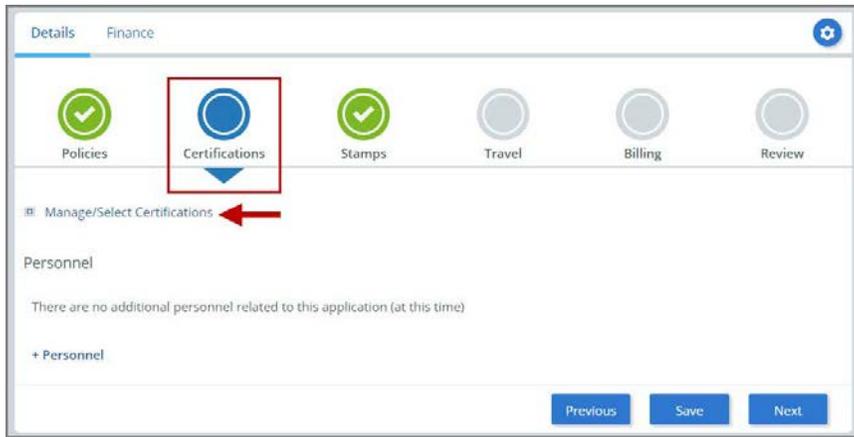
Please see the Policy on Request for Extension under [General Downloads](#) for more information.

I have reviewed and agreed to the above policies.

Next



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

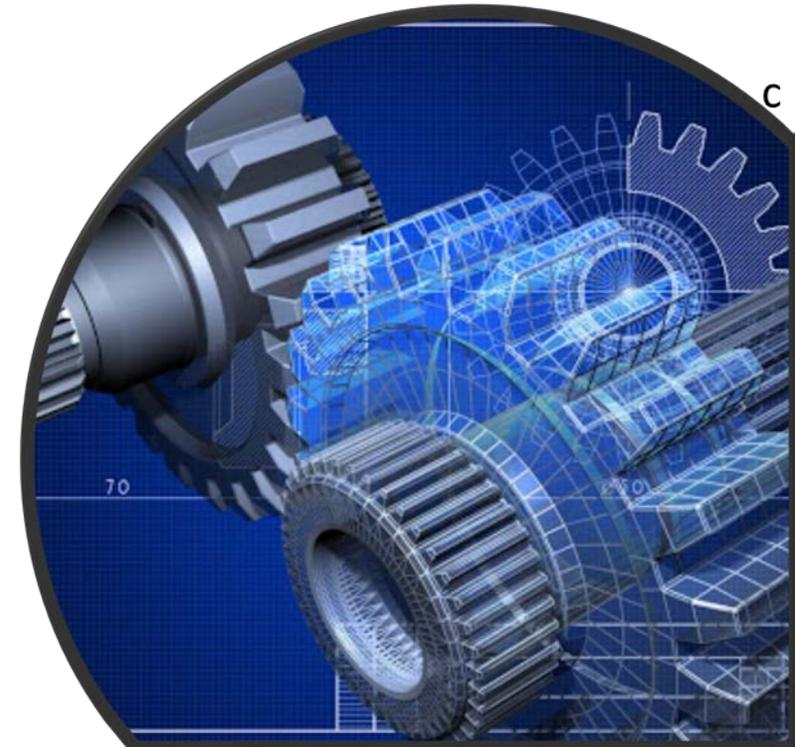
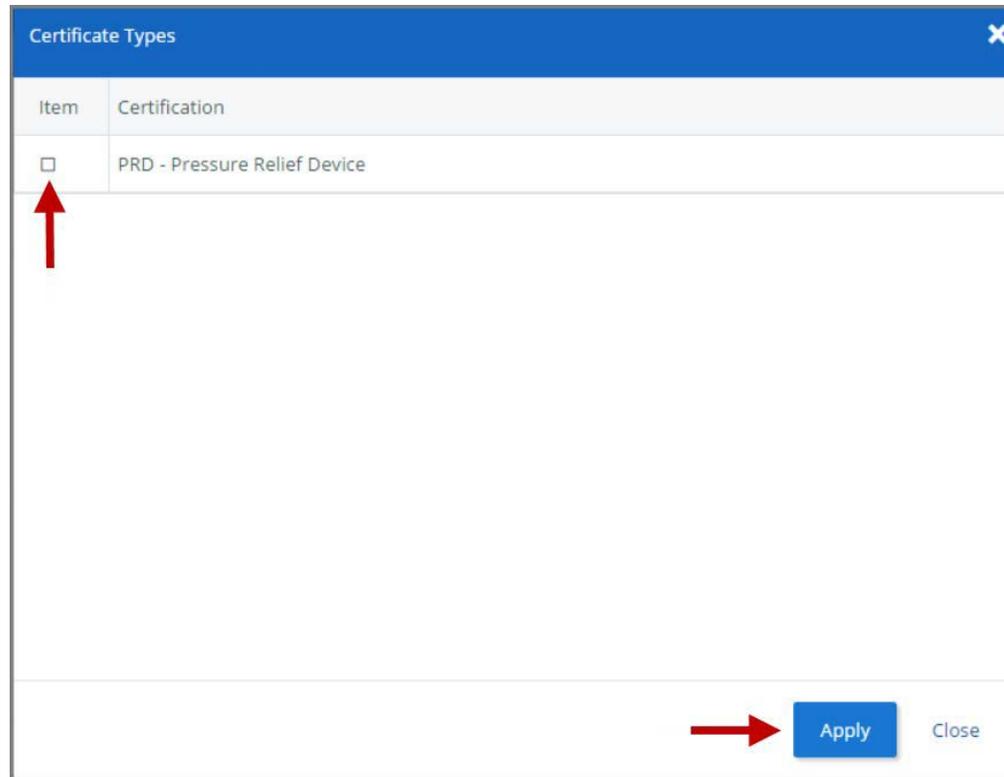


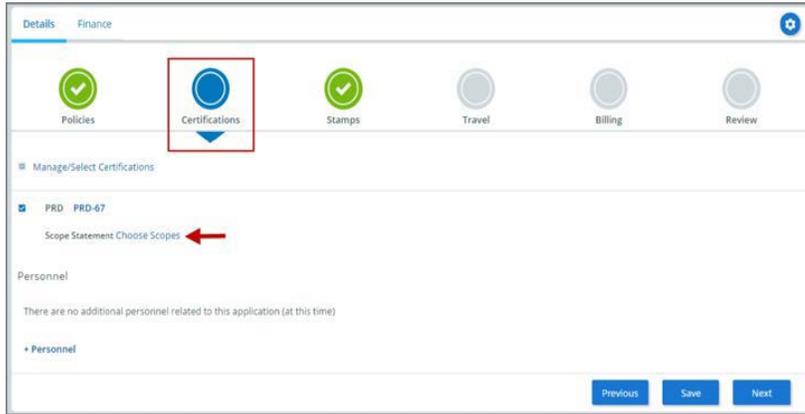
13. The Certificate Types form is displayed containing the PRD-Pressure Relief Device Certificate Type. Select the Certificate Type.

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

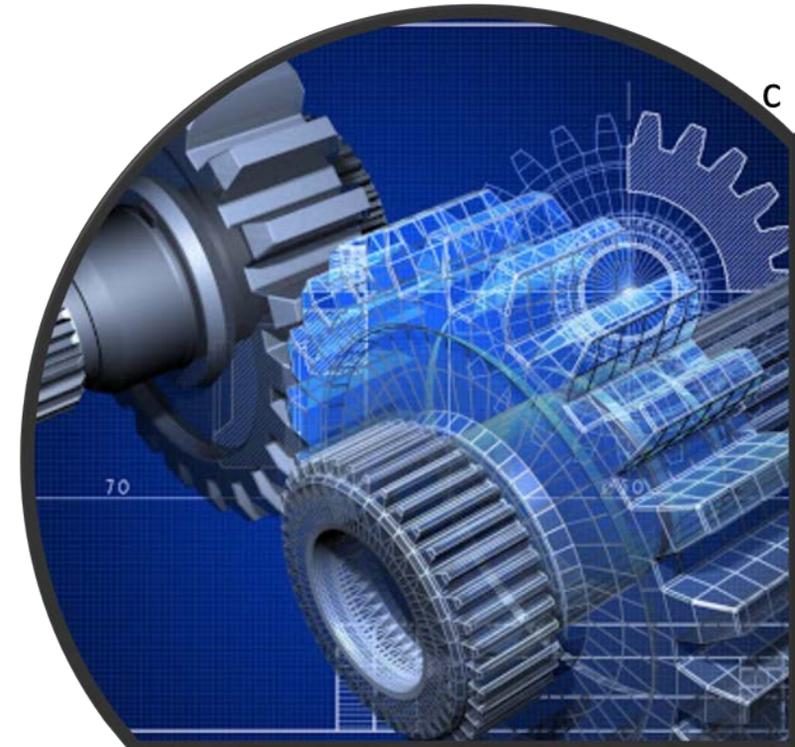
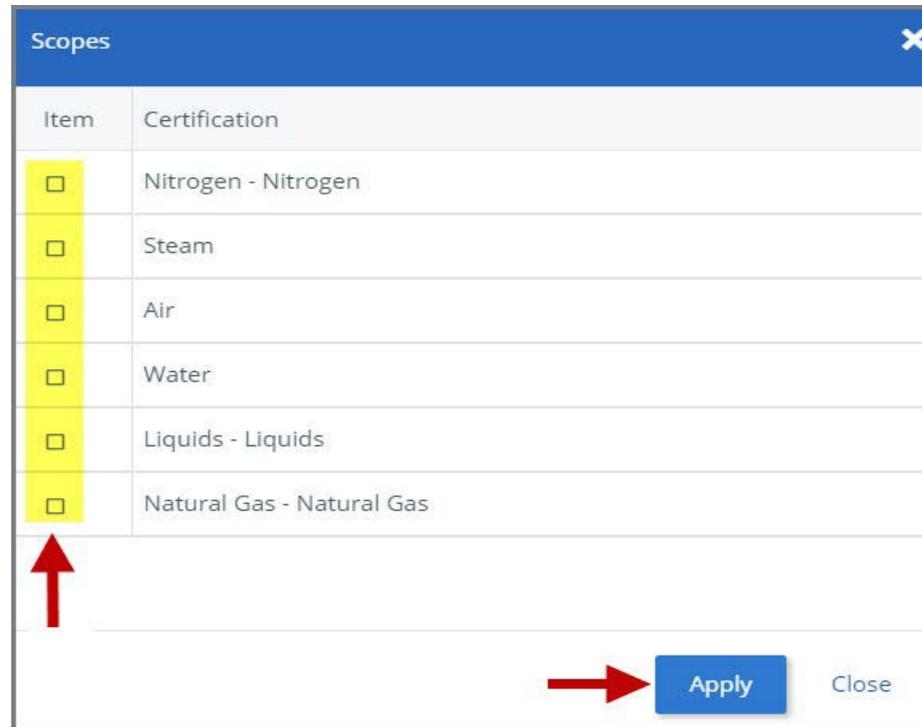
17. You will be taken to the **Scopes** form. Select the applicable scope(s).

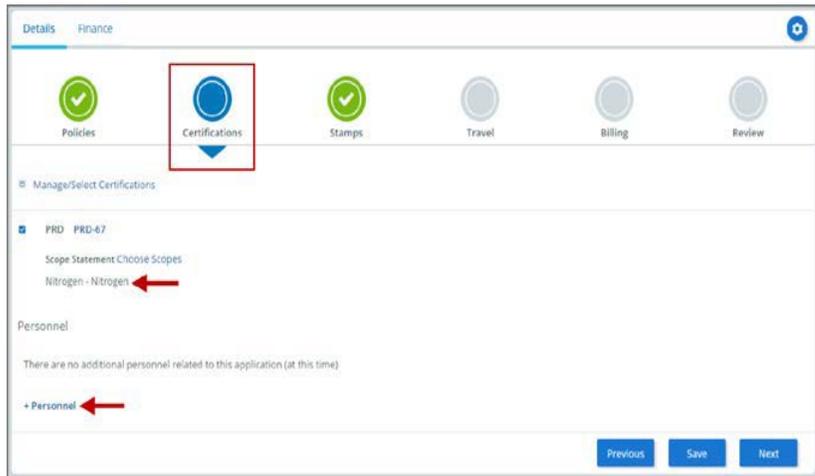
18. When done, click **Apply** to continue.



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.

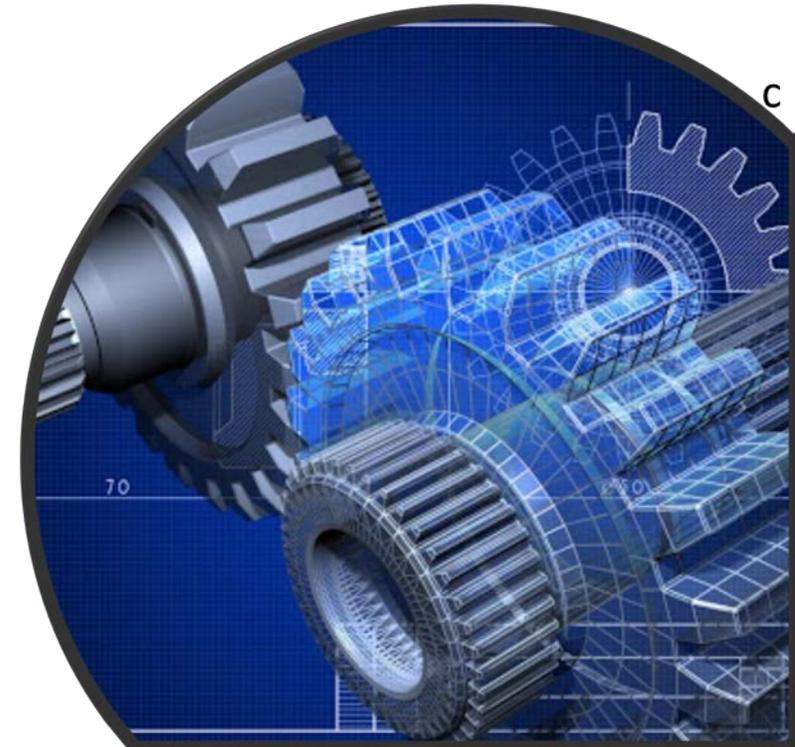
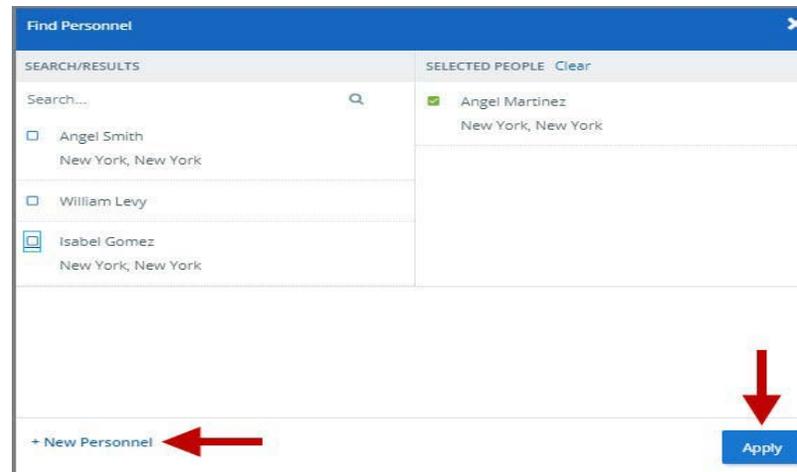
22. You can select the Individual Observers that are on the application and/or create a new individual observer.

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:

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



Find Personnel

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

[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.



Details Finance

Policies Certifications Stamps Travel Billing Review

Manage/Select Certifications

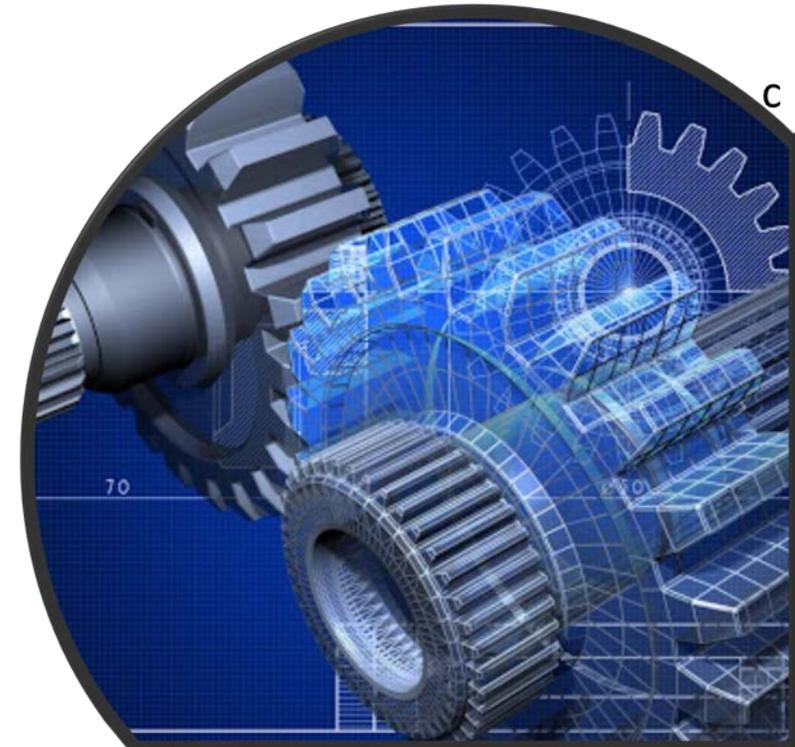
PRD PRD-67
Scope Statement Choose Scopes
Steam

Person	Manage/Select Certifications
Isabel Gomez New York, NY United States	Manage/Select Certifications
Angel Martinez New York, NY United States	Manage/Select Certifications

Personnel

[Previous] [Save] [Next]

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



27. Select the **PRD-Pressure Relief Device** certificate type option.

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

Item	Certification
<input type="checkbox"/>	PRD - Pressure Relief Device

Apply Close

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

Person	PRD
Isabel Gomez New York, NY United States	PRD Choose Scopes
Angel Martinez New York, NY United States	PRD Choose Scopes

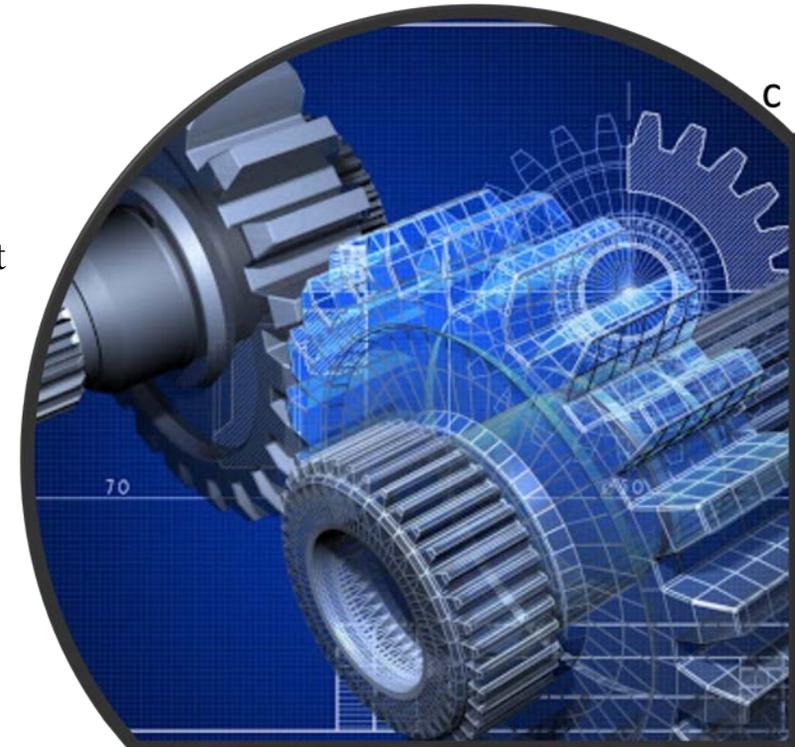
Previous Save Next

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).



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

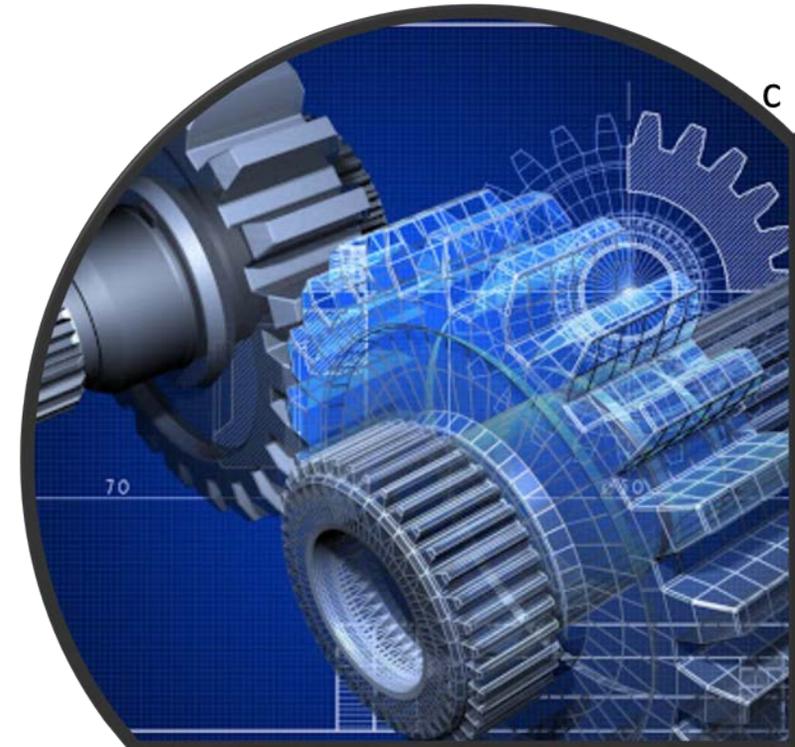
34. When done, click **Next** to continue.

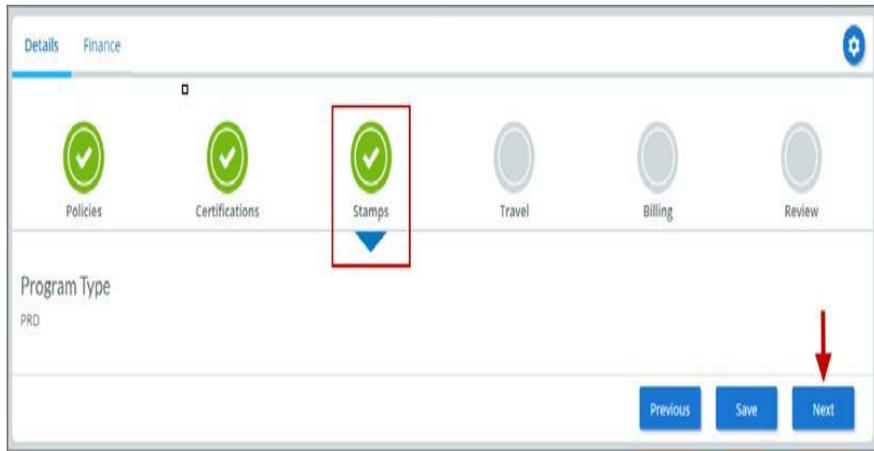
Details	Finance
<input checked="" type="checkbox"/> Policies	<input checked="" type="checkbox"/> Certifications
<input checked="" type="checkbox"/> Stamps	<input type="checkbox"/> Travel
<input type="checkbox"/> Billing	<input type="checkbox"/> Review

PRD PRD-47
Scope Statement Choose Scopes
Nitrogen - Nitrogen

Personnel	PRD
Jane Doe New York, NY United States	Choose Scopes Steam - Steam
John Smith New York, NY United States	Choose Scopes Air - Air

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





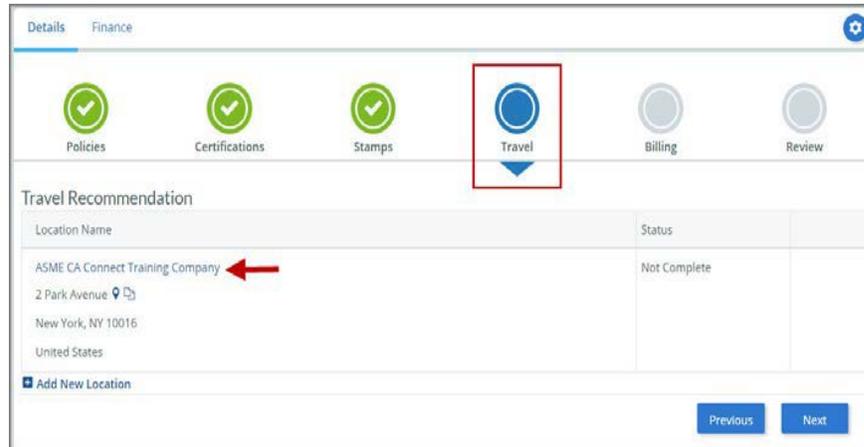
36. The application process will advance to the **Travel** tab.

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.



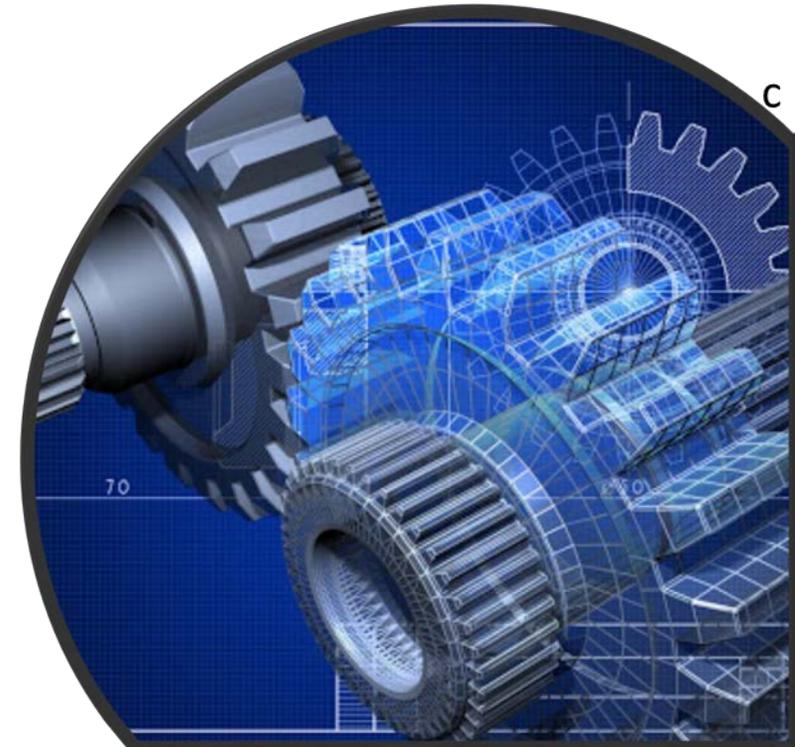
Note: The **Plant Address** is required in order to complete the application. If the **Plant Address** is not pre-populated on the form, you will need to exit the application and contact CA Connect Customer Support.

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.

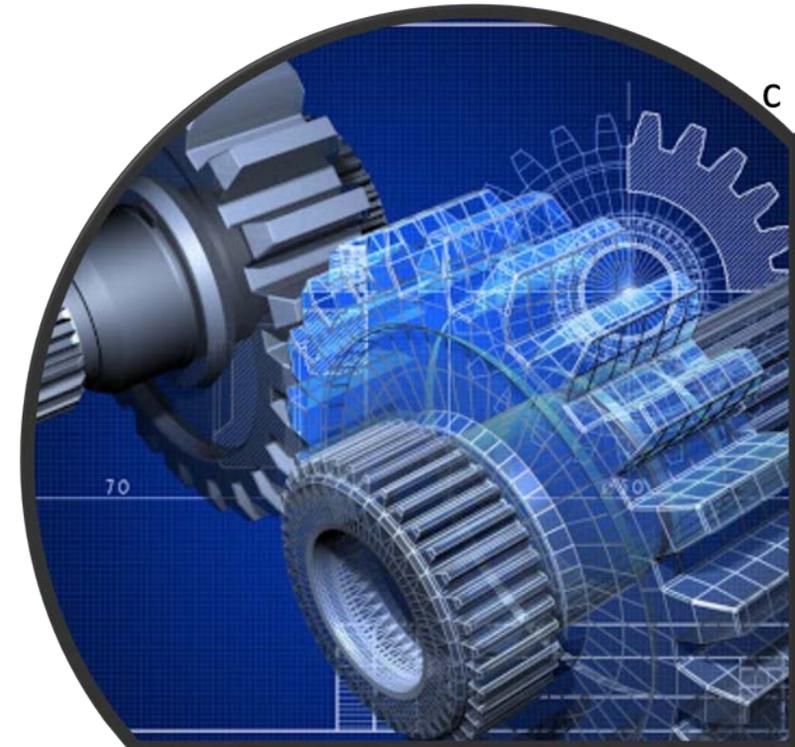


Please review the addresses below.

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

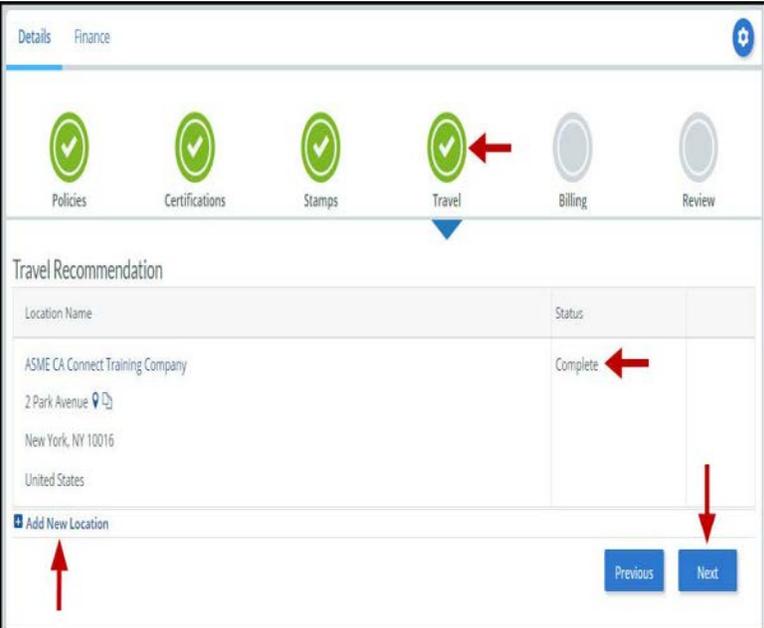
Save Cancel



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.



The screenshot shows a web interface with a navigation bar at the top containing 'Details' and 'Finance'. Below the navigation bar are six tabs: Policies, Certifications, Stamps, Travel, Billing, and Review. The 'Travel' tab is active, indicated by a green checkmark and a red arrow pointing to it. Below the tabs is a 'Travel Recommendation' section with a table. The table has two columns: 'Location Name' and 'Status'. The first row contains 'ASME CA Connect Training Company' and 'Complete', with a red arrow pointing to the 'Complete' status. Below the table is an 'Add New Location' link with a red arrow pointing to it. At the bottom right of the form are 'Previous' and 'Next' buttons, with a red arrow pointing to the 'Next' button.

49. The **Travel** tab is updated to reflect a green checkmark.

50. Your application process will advance to the **Billing tab**.

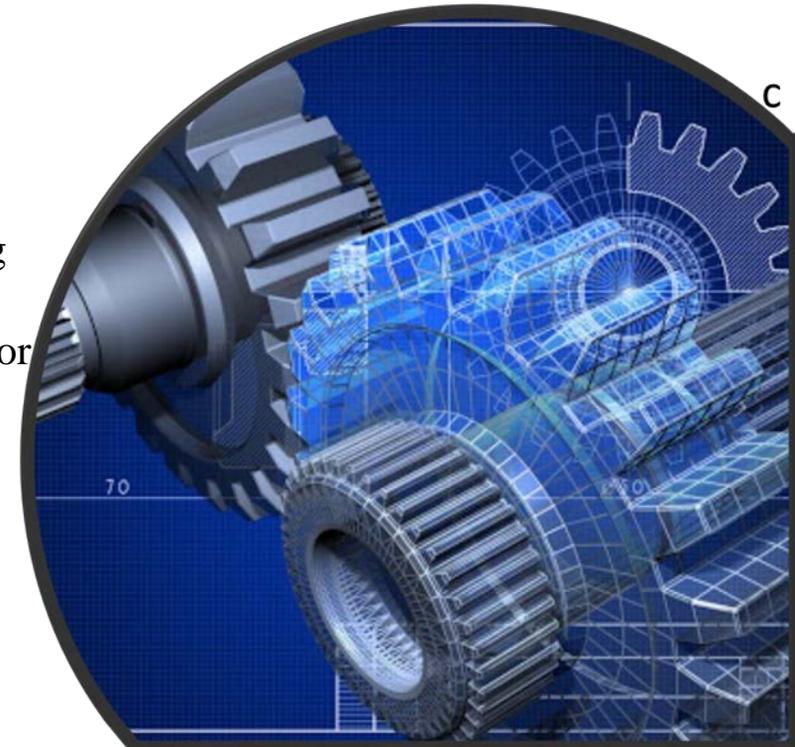
51. A **Use Plant Address** link is displayed under the Billing Address. If a Mailing Address and/or Billing Address was previously entered for the company, you will also see **Use Mailing Address** and **Use Billing Address** links. You can elect to use any one of these addresses to auto-populated the 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.



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



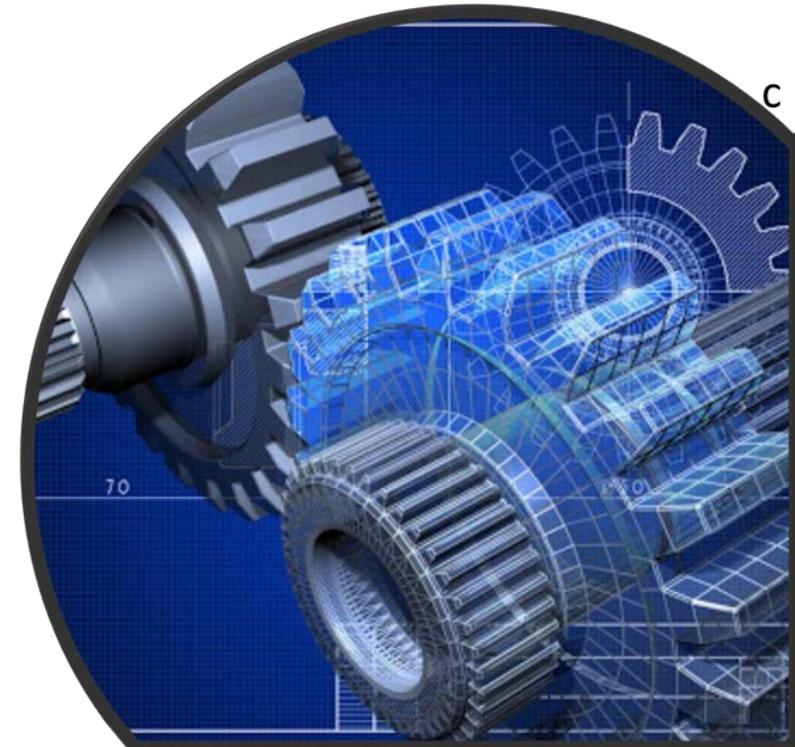
54. The **Billing** tab is updated to reflect a green checkmark. Your application process will advance to the **Review tab**.

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.



Details Finance

Policies Certifications Stamps Travel Billing **Review**

Please confirm availability dates
 ASME Reviews/Survey are generally scheduled three to four months in advance. When considering the timeframe for scheduling your ASME Review/Survey, make sure the date ranges you provide allow for your Review/Survey to be scheduled a minimum 10 weeks (2.5 month) prior to your certificate expiration.
[View More](#)

Earliest Date
 The date selected should be a minimum three months from today's date

Dates Unavailable Add Dates
 Start Date End Date Remove

Sister Locations



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**.

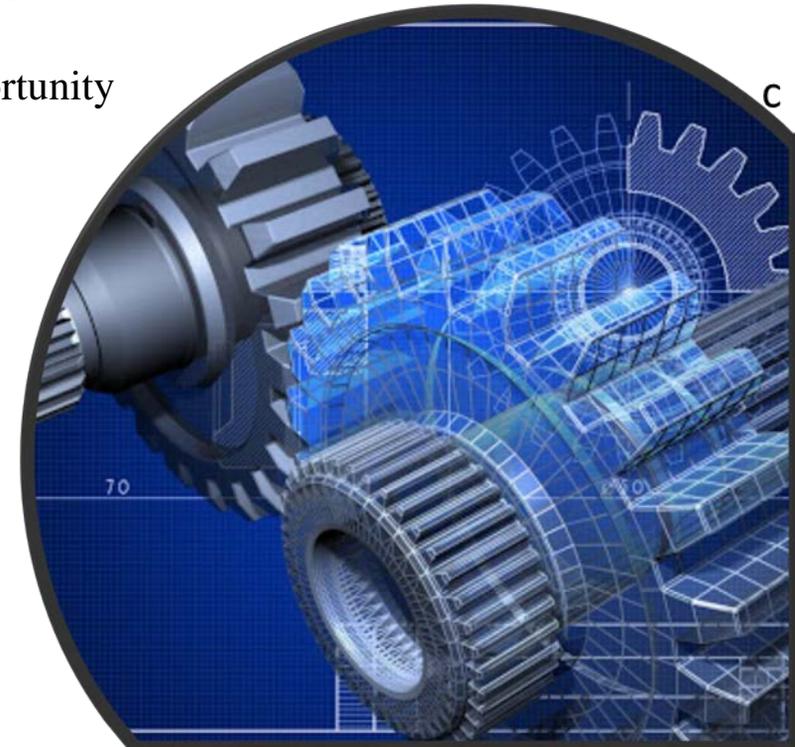
Please review the details of your application

Travel [edit](#)

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

Billing [edit](#)

Credit Card Processing Form
[pdf](#) 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

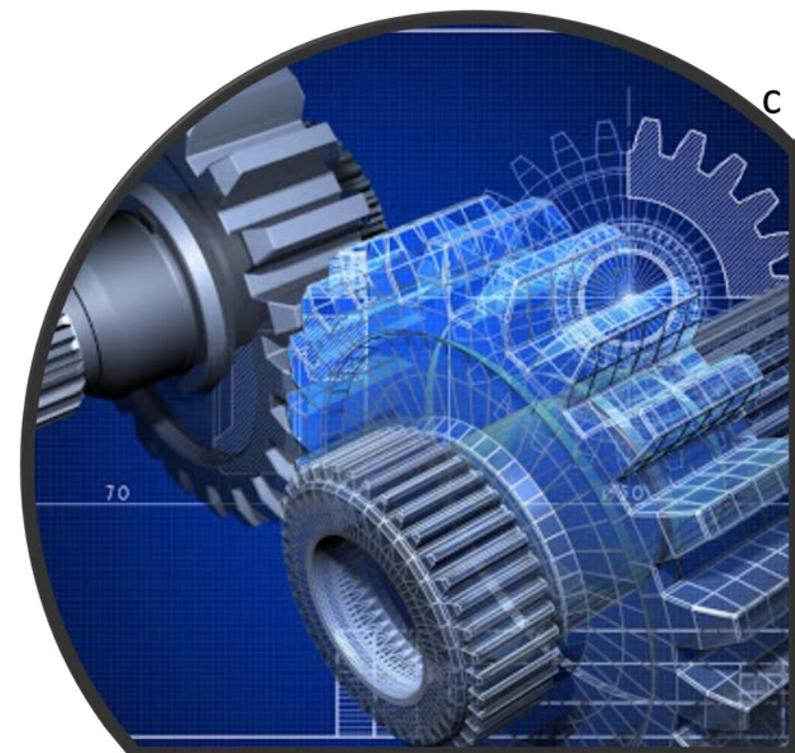
Instructions: Please click the "Print Agreement" button, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it. Scan the signed form and save it as a pdf file on your computer. Finally, upload the scanned document via the upload box located below the "Print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

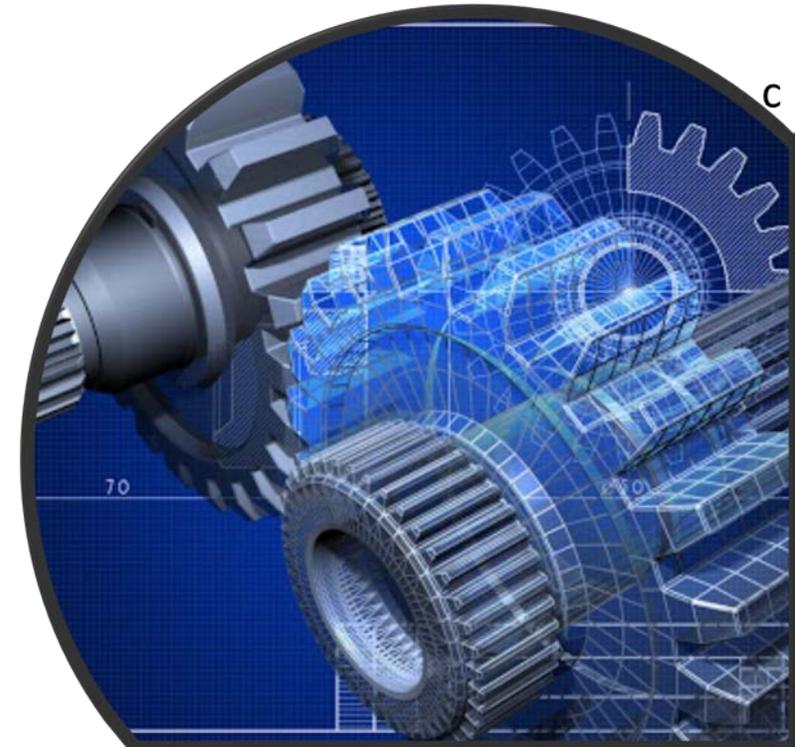


67. Once your application is complete and all tabs display a green checkmark, the **Submit** button will be presented for application submission. Click the **Submit** option.



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.





For Additional Support Please email
ca@asme.org

