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

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

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**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**.
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**.

**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.
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.

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.
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.

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.
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.

![Contact Registration Image]

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.

![Log in As Registered Contact Image]
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.

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 **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 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 AIA certificate type.
12. When done, click **Apply** to continue.

![Certificate Types form](image)

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

![Certiifications tab](image)

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.
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.
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 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.

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.
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.

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.

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.

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**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.

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 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.

![Image of the Choose Scopes feature]

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.

![Image of the Scopes form with selected options]
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.

![Scope Statement](image1)

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. Enter the **number of ASME Single Certification Marks** you like to receive.

20. Check each checkbox that applies to the certification. The **Stamp Confirmed by Applicant** checkbox is required.

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

![Stamps](image2)
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.

![Image of CA Connect Customer User Guide](image)

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.

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.

![Image of Hotel address validation]

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 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.

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.

![Image of Travel Recommendation Details]

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-populate 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.

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, 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.

45. 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.

46. You can also download the Credit Card Processing Form.
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.

53. 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.

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.

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**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 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 BPE certificate type.
11. When done, click Apply to continue.
12. The BPE 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. 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.
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.
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.
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 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.
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.

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.

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.

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.

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**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](https://www.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.

![Travel Recommendation Form](image)

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.
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.
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.

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.

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.

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.

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](https://www.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.
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. 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. Enter the **number of ASME Single Certification Marks** you like to receive.

23. Check each checkbox that applies to the certification. The **Stamp Confirmed by Applicant** checkbox is required.

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.

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.
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.
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 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.

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.

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.

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 (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.

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.
   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.

![Certificate Types](image)

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

![Certifications](image)

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.
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.
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 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.
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.
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.

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.

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.](http://www.asme.org)
   
   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.

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.

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.
   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.
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.

![Certifications tab](image)

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.

![Stamps tab](image)

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.
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.
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.
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 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.

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.

![Travel Recommendation Details](image)

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.
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.

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.

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.

   ![Screen shot of the Stamps tab with a green checkmark]

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.
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.
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.
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 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.
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.
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.

![Diagram of file upload process]

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.

![Application submission process]

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.
   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 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.

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.

![Certificate Types](image)

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

![Site details](image)

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.
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.
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 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.

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.
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.

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.

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.

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.
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-populate 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.
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.

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.

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.

![Print Document Link](image)

### 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 open 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.

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 asterisk.
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 Form]

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.
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 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.

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.

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.

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.

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.

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**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.

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 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.

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.
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.

![Agreement Form Download and Upload](image)

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.

![Submit Button](image)

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.
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 open 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 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.
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.
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.
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 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.

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.
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.

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.

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 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 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.

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.
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.
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.

![Travel Recommendation Details](image)

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-populate 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.
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.

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.

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.
   - 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.

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.

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.
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.
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 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.
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.
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.

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.

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.
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.
   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.
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.
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.
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.

![Travel tab](image)

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.
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.
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 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.
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.
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.

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.
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.
   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.
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.
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.

![Image of Travel Recommendation Detail form](image.png)

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.
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.
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 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.
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.

![Travel Tab Status Complete]

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.
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.

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.

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.
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.
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.
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 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.
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.
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.

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.
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.

**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).

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**. 
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 Building change request you are applying for.

7. Enter the information in the fields listed below.

8. When done, click Save to continue.

9. You will be directed back to the previous page where the information you entered on the form is displayed.

10. 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.
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 ¾” and ½” 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.
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.

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.

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 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**.
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. 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**.

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.
   - 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.
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. 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)

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**.
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**.

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. 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.
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.
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.
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. 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)

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**.
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**.

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. 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.
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**.

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. 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.
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**.
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**.

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. 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.
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**.
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.
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.

A PDF document, containing the Certificate Holder Details, will be downloaded to your local computer for you review and print.
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 (see Figure xx – Logout). You will be redirected to the Sign In screen.

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
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