

New CA Connect
Tutorial / Getting Started Guide

CA Connect

ASME Customer User Guide

(August 2015)

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1. Introduction

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.

2. Access CA Connect

To access the system, open your web browser and type **caconnect.asme.org**.

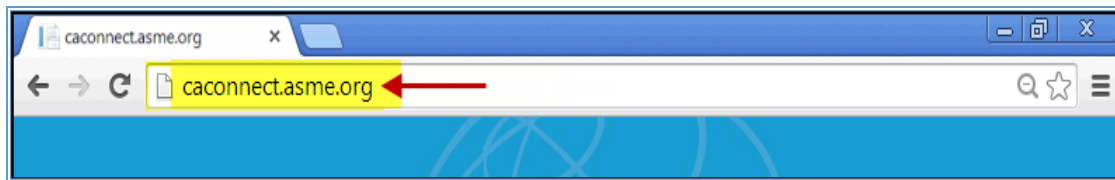


Figure 1 - Access CA Connect

3. Customer Login

Enter your **email address** registered in CA Connect on the **User Login** page then click on the **Continue** button. You will be prompted to enter your password. Enter your **password** then click on the **Log In** button. Upon login, you will be directed to the **Company Dashboard – Applications/Certificates**.

Two side-by-side screenshots of the 'User Login' page. The left screenshot shows the first step: 'Type in your email address to proceed.' with an 'Email:' field containing 'doej@asme.org' and a 'Continue' button. Red arrows point to the email field and the button. The right screenshot shows the second step: 'Please type in your password.' with an 'Email:' field (containing 'doej@asme.org') and a 'Password:' field with masked characters. A 'Log In' button is below. Red arrows point to the password field and the button. Both screenshots have a 'Go to Certificate Holder Search' link at the bottom and a circular refresh icon.

Figure 2 - Login

4. Change Your Password

Enter your **email address** registered in CA Connect on the **User Login** page then click on the **Change your password** link. Enter your **current password**, the **new password**, and re-enter the new password in the **Confirm New Password** textbox. When done, click on the **Change Password** button.

The figure consists of three side-by-side screenshots of the 'User Login' page, illustrating the steps to change a password. Red arrows point to the specific elements being interacted with in each step.

- First Screenshot:** The 'Email' field contains 'doej@asme.org'. A red arrow points to the 'Change your password' link at the bottom left. A yellow highlight is under this link.
- Second Screenshot:** The 'Email' field is filled. The 'Enter your current password' field is filled with dots. The 'New Password' field is filled with dots and has a strength indicator showing 'Good'. The 'Confirm New Password' field is filled with dots. A red arrow points to the 'Change Password' button.
- Third Screenshot:** A message at the top says 'Your password has been changed.' in orange. A red arrow points to the 'Continue' button.

Figure 3 - Change Your Password

5. Forgot your Password

Enter your **email address** registered in CA Connect on the **User Login** page then click on the **Forgot your password** link. Click on the **Reset Password** button.

The figure consists of two side-by-side screenshots of the 'User Login' page, illustrating the steps to reset a password.

- First Screenshot:** The 'Email' field contains 'doej@asme.org'. A red arrow points to the 'Forgot your password' link at the bottom left. A yellow highlight is under this link.
- Second Screenshot:** The 'Email' field contains 'doej@asme.org'. A red arrow points to the 'Reset Password' button.

Figure 4 - Forgot Your Password

You will receive a message on the User Login window to **Please check your email account for your new password**. Go to your email account to retrieve your temporary password to access CA Connect. Return to CA Connect and click on the **Continue** button. You will be asked to re-enter your email address. After entering your email address, the User Login window will be display. Enter the **temporary password** that was sent to you by email, then enter your new password. When done, click on the **Change Password** button. You will be directed to the Contact Information Page.

Figure 5 - Forgot Your Password (cont.)

6. Registering a New Contact

Enter the Contact information. The required fields are denoted with an * and must be filled in. For phone numbers, enter only the numbers without dashes or parenthesis. When done, click on the **Submit** button.

Figure 6 - Contact Information Page – Add New Contact

7. Company Information Page (Company Search)

Enter the Company Name then click on the **Search** button. If the Company is not in the system, you will receive the message **No matching companies found**. Click on the **Register** link to create an account for the new company.

The screenshot shows the ASME website header with the logo and navigation links. The main content area is titled 'Company Information'. It features a search bar with the text 'ABC Training company' and a 'Search' button. Below the search bar, there is a link 'Register a new company.' with a red arrow pointing to it. Below this link, there is a table with columns: Company Name, Address Line 1, City, State, and Country/Region. The table is empty, and a red arrow points to the text 'No matching companies found' at the bottom of the table.

Figure 7- Company Information – Register New Company

8. Company Information page (Registering a New Company)

Enter the Company information then click on the **Submit** button. The required fields are denoted with an * and must be filled in. The mailing address should be entered if it is different from the plant address.

The screenshot shows the ASME website header with the logo and navigation links. The main content area is titled 'Company Information'. It features several input fields: 'Company name *' (filled with 'ABC Training Company'), 'Legal company name' (filled with 'ABC Training Company'), 'Company abbreviation' (filled with 'ABCTD'), 'Division name' (filled with 'ABC Training Unit'), and 'Company website' (filled with 'www.abctraining.com'). Below these fields, there are two sections: 'Plant Address' and 'Mailing Address'. Each section has six lines for address entry. The 'Plant Address' section has dropdowns for 'Country *' (United States), 'City *' (New York), 'State' (New York), and 'Zip/Postal Code' (10016). The 'Mailing Address' section has dropdowns for 'Country' (United States), 'City' (New York), 'State' (New York), and 'Zip/Postal Code' (10002). A red arrow points to the 'Submit' button at the bottom right.

Figure 8 - Company Information – Add New Company Page

a. New Company - Verification

After the company information submittal process is complete, the User Login page will prompt you to enter your email address and password. The message below will appear after **Log In** button is clicked.

Your registration on CA Connect has been confirmed. A Verification E-mail was sent to the e-mail address on file. Please locate the notification and click on the validation link found in the body of the e-mail to confirm your account and gain access to the system.
If you are unable to find the validation e-mail, please check your spam box.
If you encounter any problems, please send an e-mail to ca@asme.org.

Figure 9 - Verification Confirmation Message

b. New Company - Email Verification

The following email will be sent to your registered email address on file. Click on the link in the email to validate your user account and access CA Connect.

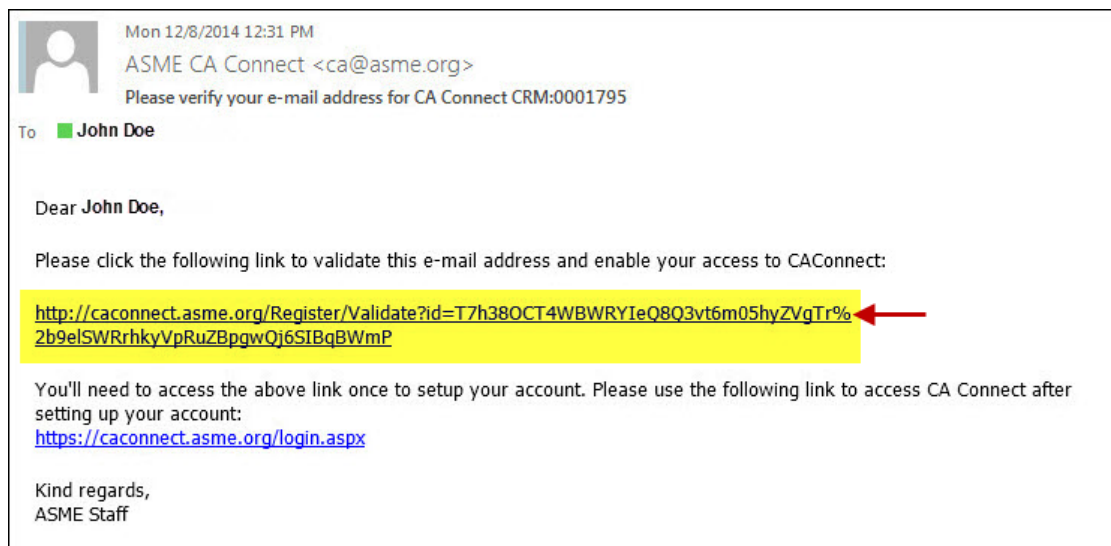


Figure 10 - Email Verification

You will then receive the following confirmation message.

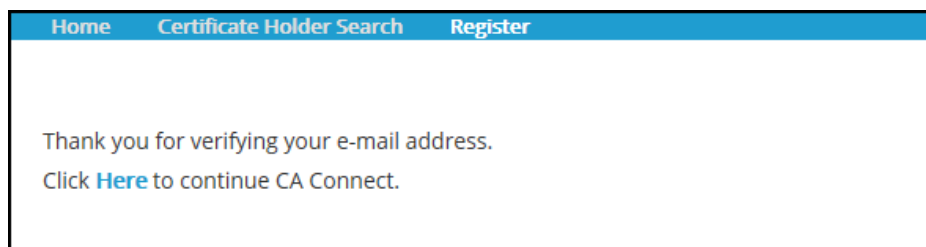


Figure 11 - Email Verification Confirmation Message

9. Company Information Page (Existing Company)

In order to become a primary contact for a company already existing in CA Connect, enter the **Company name** and click on the **Search button**. When the company list appears, select the appropriate company and click on the **Select** link.

Company Name	Address Line 1	City	State	Country/Region	Select
Ajax Boiler Inc.	2701 South Harbor Blvd.	Santa Ana	California	United States	Select
Dumping Boiler Inc.	5847 San Felipe St	Houston	Texas	United States	Select
Nationwide Boiler Inc.	42400 Christy Street	Fremont	California	United States	Select

Figure 122 - Company Dashboard – Existing Company

The Primary Contact will need to submit their appointment as company representative on company letterhead to ASME Conformity Assessment (see details below).

You must submit a letter announcing your appointment as ASME contact on company letterhead or letter with a corporate seal before you can be linked to this company.

Please provide the following information:

1. **New Contact Name** (First Name, Middle Initial, Last Name)
2. **Job Title**
3. **Telephone Number**
4. **Fax Number**
5. **Mobile Number**
6. **E-mail Address**
7. **Location(s)** (if applicable)
8. **Certificate(s)** (if applicable)
9. **Previous Contact** (if known)
10. **Current or Previous ASME Association if any** (i.e. Student Member, Committee Volunteer, Product Catalog orders) (if applicable)

Requests should be sent to:
ASME
Conformity Assessment
Two Park Avenue
New York, NY 10016-5990
Fax: +1.212.591.8501
E-mail: ca@asme.org

Figure 133 - Email Verification Message

10. Company Dashboard – Applications/Certificates

After you login, you will be directed to the **Company Dashboard**. The Company Dashboard serves as the hub for your application(s). From here, you can perform multiple activities such as the following:

- Apply for new/renewal certificate(s)
- View application and certificate status (once you have applied)
- View Company primary contact/plant & mailing addresses
- Register new company
- View upcoming reviews/surveys
- View Change Requests

- The **Register New Company** button is used to create an account for a new company (See Sections 7 and 8).
- The **Apply for New/Renewal Certificate** button is used to apply for certification.

The screenshot shows the 'Company Dashboard' for 'Jane Doe'. The main section is titled 'Certificates you hold'. It displays company information for 'ABC Training Company' (ID 106444) and its details. A green button labeled 'Apply for New/Renewal Certificate' is prominent. Below it is a table with columns for Application #, Program Type, Application Status, Certificate Number, Designator, Status, Issuance Date, Expiration Date, and Extension Date. The table is currently empty. On the right, there are links for 'No Upcoming Reviews/Surveys', 'Change Requests', and 'Company 106444 Certificate Portal Validation'.

Figure 144 - Company Dashboard – Applications/Certificates

11. Submitting an Application

The application is the first step in the Conformity Assessment process. To begin the process of submitting an application for certification, click on the **Apply for New/Renewal Certificate** button.

This screenshot is identical to Figure 144, but with a red arrow pointing directly to the green 'Apply for New/Renewal Certificate' button to highlight it.

Figure 155 - Company Dashboard – Apply for New/Renewal Certificate

Note: Renewal Certificate(s) you currently hold, including corresponding certificate details, will be located on the **Certificates and Stamps** tab within the New/Renewal application.

ABC Training Company
 Company ID 106444
 Division: ABC Training Unit
 Abbreviation: ABC TD
 Website: www.abctraining.com
 Legal name: ABC Training Company

[Apply for New/Renewal Certificate](#)

Application #	Program Type	Application Type	Status	Certificate Number	Designator	Status	Issuance Date	Expiration Date	Extension Date
118491	Boiler	New	Active	52235	A	Active	07/24/2012	07/27/2015	
118491	Boiler	New	Active	52236	PP	Active	07/26/2012	07/27/2015	

Reviews/Surveys
[Change Requests](#)
 Company 101539
 Certificate
 Portal Validation
 Company 101539
 Application 101026
 Scope Change
 Company 101539
 Application 116883
 Conditional Form
 Company 101539

Figure 166 - Company Dashboard – Active Certificate(s)

a. BPV Applications

Once you click on the **Apply for New/Renewal Certificate** button you will be directed to the **New Application** page which consists of Company Information and multiple tabs used to manage and enter the information for the application. Submitting an application is a multi-step process. The data that is entered during the application process is found under each of the tabs/steps depicted on the image below.

The first tab is for reviewing **Policies**. Read the written policies shown on the page then click on the **checkbox** preceding **I have reviewed and agreed to the above policies**. When done, click on the **Next** button to move to the next step and activate the **Certificates & Stamps** tab.

Note: You will not be able to continue until you confirm that you have read the policies.

Company Dashboard Certificate Holder Search Jane Doe

New Application

ABC Training Company
 Company ID 106444

Plant Address: 2 Park Avenue
 Suite 6
 New York, New York 10016
 United States
[edit](#)

Primary Contact: Jane Doe
 doe@gmail.com
 212-591-1000

Website: www.ctilc.com

✓ Policies Certificates & Stamps Travel Billing Review

Cancellation – Reviews/Surveys scheduled by ASME
 Cancellation of review/survey dates scheduled by ASME is subject to a monetary penalty, deducted from the advanced deposit in the following schedule:

- \$2,000 for cancellation after acceptance of review/survey dates.
- \$3,500 for cancellation within 2 months of review/survey dates.
- \$6,000 for cancellation within 1 month of review/survey dates.

Extension Policy
 In order to be eligible for an extension of the expiration date stated on a Certificate, the renewal application and all applicable fees, including advance payments, must be received no later than six (6) months prior to the expiration date on the Certificate.

This will ensure that the renewal process will be completed prior to the expiration date indicated on the Certificate. Furthermore, the Certificate Holder must indicate available dates at least ten (10) weeks prior to the expiration date of the Certificate when completing the Scheduling Information Form during the renewal application process.

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

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

☒ I have reviewed and agreed to the above policies.

[Next >](#)

Figure 17 – Submit BPV Application

Click on the **dropdown option** and select the **Program Type**. For this illustration, we will be creating an application for the **Boiler** program. Click on the **Boiler** option then click on the **New Certificate** button.

Note: The **Program Type** is not available for selection when applying for the renewal of a certificate because it was assigned when the certificate was first issued.

The screenshot shows a web form titled "New Application". At the top, it displays "ABC Training Company" and "Company ID 106444". Below this, there are two columns of information: "Plant Address" (2 Park Avenue, Suite 6, New York, New York 10016, United States) and "Primary Contact" (Jane Doe, doej@gmail.com, 212-591-1000). A dropdown menu labeled "Choose a Program Type" is open, showing a list of options: Boiler, Nuclear, QSC, AIA, RTP, PRD, BPE, and NQA. The "Boiler" option is highlighted with a red arrow. Below the dropdown menu, there are four tabs: "Certificates & Stamps", "Travel", "Billing", and "Review". The "Certificates & Stamps" tab is active. In the center of the form, there is a green button labeled "New Certificate" with a red arrow pointing to it. Below this, there is a section titled "Selected Certificates" with a table that has columns for "Certificate Number", "Certificate", "Certificate Type", "Designator", "Description", and "Expiration". The table is empty, and a message below it says "No Certificates Have Been Added". At the bottom, there is a section titled "Stamp Selection" with a note: "Applicants: Indicate the number of ASME Single Certification Marks you would like to receive. You will be charged for the Marks, along with applicable taxes and shipping fees. Number of Marks Requested:". There are two input fields: "1/2" with a value of "0" and "3/4" with a value of "0". At the bottom right, there are three buttons: "Save", "Back", and "Next".

Figure 178 – Submit BPV Application – Program Type – New Certificate

If you are renewing, the **Designator** for the certificate you are currently holding, including the certificate scope description, will be listed on the page.

Selected Certificates

Certificate Number	Certificate	Certificate Type	Designator	Description	Expiration
52235	A	N/A	A-1-52235	Assembly of power boilers at field sites controlled by the above location	
52236	PP	N/A	PP-1-52236	Fabrication and assembly of pressure piping at the above location only	

Authorized Inspection Agency

Stamp Selection

Applicants: Indicate the number of ASME Single Certification Marks you would like to receive. You will be charged for the Marks, along with applicable taxes and shipping fees. Number of Marks Requested:

1/2 "

3/4 "

Figure 19 – Submit BPV Application – Renewal Certificate Designator

A window showing the list of certificate scopes that you can choose from is displayed. You can select one or more certificate scopes by individually clicking on the scope. When done, click on the **Add Selected Certificate Scopes** button.

ASME
SETTING THE STANDARD

Company Dashboard

New Application

ABC Training Compa
Company ID: 106444

Plant Address: 2 Park Av
New York
United St
[edit](#)

Website: [www.abc](#)

☒ Policies

Program Type

Boiler

Select one or more certificate scopes for this application.

- ☒ A
 - A-1- Assembly of power boilers at field sites controlled by the above location
 - A-2- Assembly of power boilers at the above location and field sites controlled by the above location
- ☐ E
- ☐ H1
- ☐ H2
- ☐ HLW
- ☐ HV
- ☐ M
- ☒ PP
 - PP-1- Fabrication and assembly of pressure piping at the above location only
 - PP-2- Fabrication and assembly of pressure piping at the above location and field sites controlled by the above location
 - PP-3- Fabrication and assembly of pressure piping at field sites controlled by the above location
- ☐ DDT

[Review](#)

Figure 180 – Submit BPV Application – Certificate Scopes

The certificates you selected, including a full description of the certificate scope, will be added to the **Selected Certificates** section. Select the **Authorized Inspection Agency** by clicking on the dropdown option and selecting the AIA. Enter the number of ASME Single Certification Marks in the **Stamp Selection** textboxes, if needed. When done, click on the **Next** button to move to the next step and activate the **Travel** tab.

Note: The following certificates types that do not require an AIA: PRD, AIA, BPE, NQA, QSC, RTP

Selected Certificates

Certificate Number	Certificate Type	Designator	Description	Expiration	
Pending	A	N/A	A-1	Assembly of power boilers at field sites controlled by the above location	
Pending	PP	N/A	PP-1	Fabrication and assembly of pressure piping at the above location only	
Pending	S	N/A	S-1	Manufacture and assembly of power boilers at the above location only	

Authorized Inspection Agency

Hartford AIA

Stamp Selection

Applicants: Indicate the number of ASME Single Certification Marks you would like to receive. You will be charged for the Marks, along with applicable taxes and shipping fees. Number of Marks Requested:

1/2 " 1

3/4 " 0

Save Back Next

Figure 191 – Submit BPV Application – AIA – Stamp Selection

Once you click on the **Next** button, a prompt is displayed alerting you that the Application has been updated and saved.

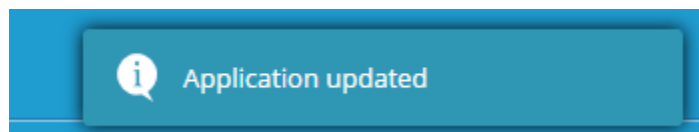


Figure 202 - Submit BPV Application – Application Updated and Saved Prompt

To **Remove** a certificate from the **Select Certificates** section, before clicking on the Next button, first click on the **trash can** image on the right-hand side of the certificate you want to remove, then click on the **Remove Certificate** button.

ASME

Company Dashboard

New Application

ABC Training Company
Company ID: 106444

Plant Address: 2 Park Ave
New York
United States

Program Type

Boiler

Selected Certificates

Certificate Number	Certificate Type	Designator	Description	Expiration	
Pending	A	N/A	A-1	Assembly of power boilers at field sites controlled by the above location	
Pending	PP	N/A	PP-1	Fabrication and assembly of pressure piping at the above location only	
Pending	S	N/A	S-1	Manufacture and assembly of power boilers at the above location only	

Confirm Delete

Are you sure you want to remove this certificate from your application?

Remove Certificate Cancel

Figure 213 - Submit BPV Application – Remove Certificate

You will be directed to the **Travel** page which is also known as Form D. Enter the information in the designated fields. When done, click on the **Next** button to move to the **Billing** tab.

The screenshot shows the 'Travel Recommendations' form. At the top, there are tabs: Policies, Certificates & Stamps, Travel (selected), Billing, and Review. The form fields are as follows:

- Division/Name:** [Text field]
- Address:** 2 Park Avenue, Suite 6
- Country:** United States (dropdown)
- City:** New York
- State:** New York (dropdown)
- Zip/Postal Code:** 10016
- Emergency Contact:**
 - Name:** Angela Taylor
 - Phone:** 212-591-1111
- Airport:**
 - Name:** JFK
 - City:** Queens
- Miles from airport to hotel:** 10
- Transportation:** Taxi (dropdown)
- Hotel:**
 - Name:** Marriott Courtyard
 - Address:** 123 Main Street
 - Country:** United States (dropdown)
 - City:** Queens
 - State:** New York (dropdown)
 - Zip/Postal Code:** 11432
 - Phone:** 718-555-5555
 - Fax:** [Text field]
- Miles from Hotel to Review/Survey Location:** 20
- Review/Survey Dates:**
 - Earliest Available Review/Survey Date:** 08/10/2015
 - Acceptable Dates for Review/Survey:** 8/10/2015 - 8/25/2015
 - Unacceptable Dates for Review/Survey:** 8/26/2015-8/31/2015

At the bottom right, there are buttons: Save, Back, and Next. The 'Next' button is highlighted with a red arrow.

Figure 224 - Submit BPV Application – Travel Tab – Form D

Note: If one or more of the required values are missing, a message prompt alerting you that specific required information is required will be displayed.

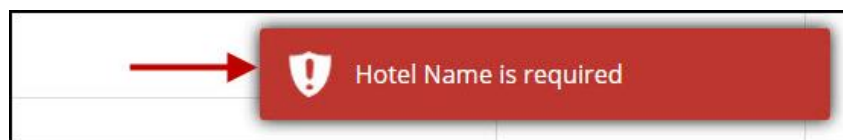


Figure 235 - Submit BPV Application – Missing Information

You will be directed to the **Billing** step. Enter the **Billing** information in the labeled fields. If the **Billing Address** is the same as the **Plant Address (or mailing address if one was entered)**, click on the **Use Plant Address** link (If a mailing address was entered there will be a link to choose that one as well). If the **Billing Address** is **not** the same as the **Plant Address or Mailing Addresses**, enter the billing address in the assigned fields.

Enter the **Bank Details** in the necessary fields.

The screenshot shows the 'Billing' tab of a web application. At the top, there are five tabs: 'Policies', 'Certificates & Stamps', 'Travel', 'Billing' (selected), and 'Review'. Below the tabs, the 'Billing' section is titled. A note states: 'A retainer is billed to cover cost associated with the review/survey. Any left over remittance will be refunded.' The 'Billing Address' section includes a link 'Use Plant Address' with a red arrow pointing to it. Below this are input fields for '2 Park Avenue', 'Suite 6', and an empty field. A 'Country' dropdown menu is set to 'United States'. Below that are fields for 'City' (New York), 'Zip/Postal Code' (10016), and 'State' (Alabama). A 'Contact/Attention' field is also present. Below the contact field are fields for 'Phone Number', 'Country Code', 'Area Code', 'Phone Number', and 'Extension'. A green button labeled 'ASME Credit Card Processing Form' with a red arrow pointing to it is located below the phone fields. The 'Banking Details' section follows, with a note: 'Please provide the following information to allow us to refund any left over remittance.' It contains input fields for 'Bank Name', 'ABA Routing Number', 'Canadian Clearing Code', 'Account Number / IBAN #', 'Swift Code', 'Bank Transit Number', 'Bank Account Name', and 'Tax ID Number'. At the bottom right, there are three buttons: 'Save', '< Back', and 'Next >' with a red arrow pointing to it.

✓ Policies ✓ Certificates & Stamps ✓ Travel **Billing** Review

Billing

A retainer is billed to cover cost associated with the review/survey. Any left over remittance will be refunded.

Billing Address [Use Plant Address](#)

2 Park Avenue

Suite 6

Country United States

City Zip/Postal Code State

New York 10016 Alabama

Contact/Attention

Phone Number Country Code Area Code Phone Number Extension

ASME Credit Card Processing Form

Banking Details

Please provide the following information to allow us to refund any left over remittance.

Bank Name

ABA Routing Number

Canadian Clearing Code

Account Number / IBAN #

Swift Code

Bank Transit Number

Bank Account Name

Tax ID Number

Save < Back Next >

Figure 246 - Submit BPV Application – Billing Tab

You will be directed to the **Review** tab. The **Review** step allows you the opportunity to review and edit the information that you have entered in the previous steps. To alter any of the information, click on the **edit** link. You will be directed to the step that contains the information you want to change. Update the information, click on the **Save** button, then click on the **Review** tab to return to the Review step. Following your review, click on the **Submit Application** button to submit the application.

✓ Policies

✓ Certificates & Stamps

✓ Travel

✓ Billing

✓ Review

Please review the details of your application

Certificates & Stamps [edit](#)

Certificate Number	Certificate	Designator	Type of Authorization
Pending	A	A-1-52235	
Pending	PP	PP-1-52236	

1/2" Stamps Requested: 1
3/4" Stamps Requested: 0

Travel [edit](#)

Division Information

2 Park Avenue
Suite 6
New York, 10016

Emergency Contact

Angela Taylor212-591-1111

Hotel Information

Marriott Courtyard
123 Main Street, Queens
Phone: 718-555-5555
Fax:
Miles from Hotel to Review/Survey Location:
20

Airport Information

JFK, Queens
Miles from Airport to Hotel: 10
Transportation: Taxi

Review/Survey Information

Earliest Available Review/Survey Date:
08/10/2015
Acceptable Dates for Review/Survey:
8/10/2015 - 8/25/2015
Unacceptable Dates for Review/Survey:
8/26/2015-8/31/2015

Billing [edit](#)

Banking Details

Bank Name:
ABA Routing Number:
Canadian Clearing Code:
Account Number/IBAN #:
Swift Code:
Bank Transit Number:
Bank Account Name:
Tax ID Number:
Contact/Attention:

Billing Address

2 Park Avenue
Suite 6
New York, New York 10016 United States,
10016

Submit Application

Back

Figure 257 - Submit BPV Application – Review Tab

You will receive a message confirming that your application was successfully submitted. At this stage you can obtain and print the **Accreditation/Certification Agreement** Form by clicking on the **Print Agreement** button.

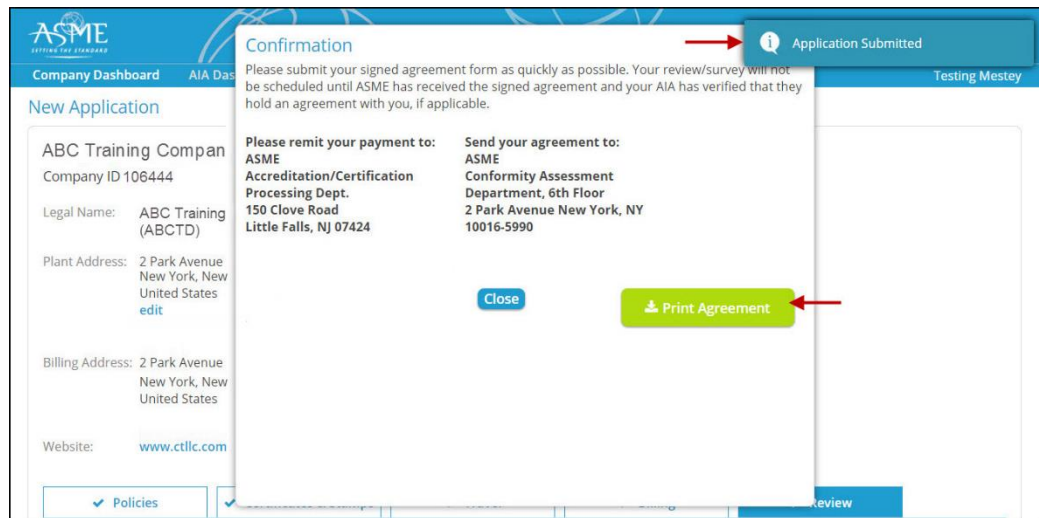


Figure 268 - Submit BPV Application – Print Agreement

The **Accreditation/Certification Agreement** form is displayed. Enter the information on the bottom part of the form. When done, **Save** and **Print** the completed form. **Sign** the form and email the form to **ca@asme.org**.

Accreditation/Certification Agreement	
<p>The organization listed on this Application for Accreditation/Certification (the "Applicant") performs or subcontracts the design, fabrication, production, testing, assembly, construction and/or installation of items, or provides a service to the aforementioned activities, at the address given, and makes this application to The American Society of Mechanical Engineers (ASME) for the appropriate Certificate of Authorization or other conformity assessment certificate, which, if applicable, permits the use of the Certification Mark. The Applicant:</p>	
<p>(1) Agrees to use the Certificate and Certification Mark, if applicable, in accordance with the applicable ASME Code or Standard and supplemental conformity assessment requirements governing this application.</p>	
<p>(2) Agrees to return the Certification Mark Stamp and/or Certificate anytime ASME may so request, at the time the Applicant discontinues the work covered, or at the time the Certificate expires, if not renewed.</p>	
<p>(3) Accepts the conduct of announced or unannounced audits as required by the appropriate ASME accreditation/certification body. Access to the inspection site to conduct audits, reviews or surveys, including travel to and from the site, is the responsibility of the Applicant. If access to the site is blocked or impeded, or if the Applicant deliberately misrepresents information to ASME and its agents, then ASME is not responsible for the Applicant failing to receive or continue to have accreditation/certification.</p>	
<p>(4) Agrees to indemnify and hold harmless ASME and its agents from and against any costs (including legal fees and expenses) and any direct, indirect, incidental or consequential damages (including loss of profits or business opportunity) arising out of any claim or cause of action in any way related to this Agreement or the subject matter hereof, including but not limited to claims based on contract, tort (including negligence), strict liability or breach of warranty (express or implied).</p>	
<p>(5) Understands that the Applicant's use of the ASME Certification Mark may be allowed provisionally by ASME in its discretion until a decision is made on an appeal of an action of an ASME subcommittee, committee or board and accepts the obligation to pay all legal fees and expenses and ASME's cost for recovering the Certificate and stamp if not returned.</p>	
<p>(6) Agrees to pay ASME for all fees, expenses and expenditures associated with the Review/Survey/Audit conducted by ASME.</p>	
<p>Legal Company Name: _____</p>	
<p>Print Name: _____</p>	
<p>Signature: _____ <small>Signature must be by a Company Officer or Designee</small></p>	
<p>Title: _____</p>	
<p>Date: _____</p>	
<p>Application#: _____</p>	<p>Company ID#: _____</p>
<p>GEN-FRM-01, Rev. 1, 11/13/2014</p>	

Figure 29 - Submit BPV Application - Accreditation/Certification Agreement Form

b. Non-BPV Applications

Once you click on the **Apply for New/Renewal Certificate** button you will be directed to the **New Application** page which consists of Company Information and multiple tabs used to manage and enter the information for the application. Submitting an application is a multi-step process. The data that is entered during the application process is found under each of the tabs/steps depicted on the image below.

The first tab is for reviewing **Policies**. Read the written policies shown on the page then click on the **checkbox** preceding **I have reviewed and agreed to the above policies**. When done, click on the **Next** button to move to the next step and activate the **Certificates & Stamps** tab.

Note: You will not be able to continue until you confirm that you have read the policies.

The screenshot displays the 'New Application' page for 'ABC Training Company' (Company ID 106444). The page includes fields for Plant Address (2 Park Avenue, Suite 6, New York, NY 10016) and Primary Contact (Jane Doe, doe@gmail.com, 212-591-1000). A tabbed interface at the bottom shows 'Policies' as the active tab, with other tabs for 'Certificates & Stamps', 'Travel', 'Billing', and 'Review'. The 'Policies' section contains text about cancellation penalties and an extension policy. At the bottom, there is a checkbox labeled 'I have reviewed and agreed to the above policies.' which is checked, and a blue 'Next >' button. Red arrows point to the checkbox and the 'Next' button.

Figure 270 – Submit non-BPV Application

Click on the **dropdown option** and select the **Program Type**. For this illustration, we will be creating an application for the **Nuclear** program. Select the appropriate program type and then click on the **New Certificate** button.

Note: BPE, RTP, NQA, QSC, and AIA all follow a similar process for selecting the certification/accreditation.

Note: The **Program Type** is not available for selection when applying for the renewal of a certificate because it was assigned when the certificate was first issued.

Figure 281 - Submit non-BPV Application – Program Type – New Certificate

The **Designator** for the certificate you are currently holding, including the certificate scope description, will be listed on the page.

To choose the certificate type that you wish to apply for, click the **New Certificate** button.

Figure 292 - Choosing a certificate type

To apply for a corporate certificate you will need to click the copy icon on the corporate certificate, and then select corporate extension.

Note: You cannot apply for more than one corporate certificate.

The screenshot shows a table titled "Selected Certificates" with columns: Certificate Number, Certificate, Certificate Type, Designator, Description, and Expiration. The first row shows a "Pending" certificate with type "Certificate of Authorization (Corporate)". A red arrow points to the copy icon in the Expiration column. Below the table, a second row shows a dropdown menu for "Certificate of Authorization" with options: "Choose a Certificate Type", "Certificate of Authorization", "Certificate of Authorization (Corporate)", "Certificate of Authorization (Corporate Extension)" (highlighted with a red arrow), and "Quality Assurance Program Certificate".

Figure 303 - Choosing a Nuclear Certificate

For **Non-Boiler** (Except PRD) programs, a **Download Conditional Form** button appears on the page for you to obtain and fill out a **Supplemental Application Form**. By clicking this button navigates you to the **Downloadable Resources** page. Scroll down to the **General Download Form** and locate the appropriate supplemental application form. Save the supplemental application form to your desktop, which will allow you to enter the applicable information. The saved document will be uploaded on the **Review tab**.

The screenshot shows the "Selected Certificates" table with a "Pending" certificate of type "Certificate of Authorization". Below the table, a green button labeled "Download Conditional Forms" is highlighted with a red arrow. Below this button is a section titled "Authorized Inspection Agency" with a dropdown menu. Further down is a section titled "Stamp Selection" with a note about ASME Single Certification Marks and two input fields for "1/2" and "3/4" marks, both showing "0".

Figure 314 - Submit non-BPV Application – Download Conditional Forms

The certificates you selected will be added to the **Selected Certificates** section. To **Remove** a certificate from the **Select Certificates** section, before clicking on the Next button, first click on the **trash can** image on the right-hand side of the certificate you want to remove, then click on the **Remove Certificate** button.

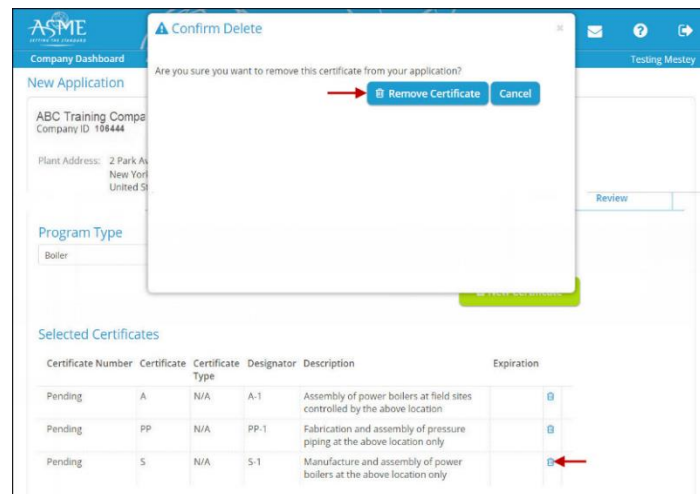


Figure 325 - Submit non-BPV Application – Remove Certificate

Select the **Authorized Inspection Agency** by clicking on the dropdown option and selecting the AIA. Enter the number of ASME Single Certification Marks in the **Stamp Selection** textboxes, if needed. When done, click on the **Next** button to move to the next step and activate the **Travel** tab.

Note: The following certificates types that do not require an AIA: PRD, AIA, BPE, NQA, QSC, RTP

Authorized Inspection Agency

mestey AIA

Stamp Selection

Applicants: Indicate the number of ASME Single Certification Marks you would like to receive. You will be charged for the Marks, along with applicable taxes and shipping fees. Number of Marks Requested:

1/2 " 1

3/4 " 1

Save Back Next

Figure 336 - Submit non-BPV Application – AIA – Stamp Selection

Once you click on the **Next** button, a prompt is immediately displayed alerting you that the Application has been updated and saved.

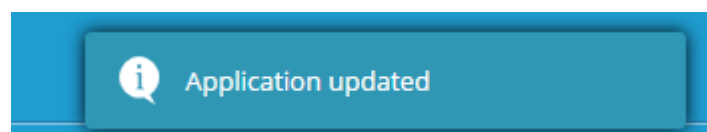


Figure 347 - Submit non-BPV Application – Application Updated and Saved Prompt

You will be directed to the **Travel** page which is also known as Form D. Enter the information in the designated fields. When done, click on the **Next** button to move to the next step and activate **Billing** tab.

Figure 358 - Submit non-BPV Application – Travel Tab – Form D

Note: If one or more of the required values are missing, a message prompt alerting you that specific required information is required will be displayed.

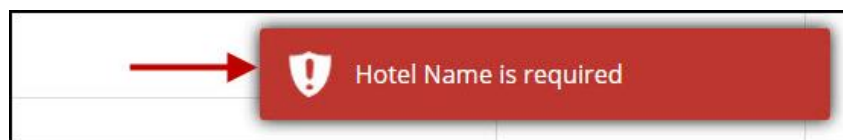


Figure 39 - Submit non-BPV Application – Missing Information

You will be directed to the **Billing** tab. Enter the **Billing** information in the labeled fields. If the **Billing Address** is the same as the **Plant Address (or mailing address if one was entered)**, click on the **Use Plant Address** link (If a mailing address was entered there will be a link to choose that one as well). If the **Billing Address** is not the same as the **Plant Address or Mailing Addresses**, enter the billing address in the assigned fields.

Enter the **Bank Details** in the necessary fields.

The screenshot shows a web application interface with a top navigation bar containing tabs: Policies, Certificates & Stamps, Travel, Billing (selected), and Review. Below the tabs, the 'Billing' section is active, displaying a message: 'A retainer is billed to cover cost associated with the review/survey. Any left over remittance will be refunded.' The 'Billing Address' section includes a link 'Use Plant Address' with a red arrow pointing to it. Below this are input fields for '2 Park Avenue', 'Suite 6', and a blank line. A 'Country' dropdown menu is set to 'United States'. Below that are fields for 'City' (New York), 'Zip/Postal Code' (10016), and 'State' (Alabama). A 'Contact/Attention' field is also present. The 'Phone Number' section has fields for 'Country Code', 'Area Code', 'Phone Number', and 'Extension'. A green button labeled 'ASME Credit Card Processing Form' with a red arrow pointing to it is located below the phone number fields. The 'Banking Details' section follows, with a message: 'Please provide the following information to allow us to refund any left over remittance.' It contains input fields for 'Bank Name', 'ABA Routing Number', 'Canadian Clearing Code', 'Account Number / IBAN #', 'Swift Code', 'Bank Transit Number', 'Bank Account Name', and 'Tax ID Number'. At the bottom right of the form are three buttons: 'Save', '< Back', and 'Next >' with a red arrow pointing to it.

Figure 360 - Submit non-BPV Application – Billing Tab

You will be directed to the **Review** tab. The **Review** step allows you the opportunity to review and edit the information that you have entered in the previous steps. To alter any of the information, click on the **edit** link. You will be directed to the step that contains the information you want to change. Update the information, click on the **Save** button, then click on the **Review** tab to return to the Review step. Following your review, click on the **Submit Application** button to submit the application.

✓ Policies

✓ Certificates & Stamps

✓ Travel

✓ Billing

✓ Review

Please review the details of your application

Certificates & Stamps [edit](#)

Certificate Number	Certificate	Designator	Type of Authorization
Pending	N		Certificate of Authorization (Corporate)
Pending	N		Certificate of Authorization (Corporate Extension)

1/2" Stamps Requested: 0
3/4" Stamps Requested: 0

Travel [edit](#)

Division Information

1 Park Ave
New York , 10016

Emergency Contact

Angela Taylor212-555-5555

Hotel Information

Kennedy Airport Hotel
345 Kennedy Road, Queens
Phone: 718-444-4444
Fax: 718-666-6666
Miles from Hotel to Review/Survey Location:
15

Airport Information

Kennedy Airport, Queens
Miles from Airport to Hotel: 10
Transportation: Taxi

Review/Survey Information

Earliest Available Review/Survey Date:
07/31/2015
Acceptable Dates for Review/Survey:
08/01/2015
Unacceptable Dates for Review/Survey:
08/05/15

Billing [edit](#)

Banking Details

Bank Name:
ABA Routing Number:
Canadian Clearing Code:
Account Number/IBAN #:
Swift Code:
Bank Transit Number:
Bank Account Name:
Tax ID Number:
Contact/Attention:

Billing Address

2 Park Ave
New York 10016, 10016

Upload Application Documents

Choose File

Browse...

Submit Application

Back

Figure 41 - Submit non-BPV Application – Review Tab

To attach your supplemental application form click on the **Browse** button located under the **Upload Applications Document** on the **Review Tab**

You will receive a message confirming that your application was successfully submitted. At this stage you can obtain and print the **Accreditation/Certification Agreement** Form by clicking on the **Print Agreement** button.

The screenshot shows the ASME 'New Application' page for 'ABC Training Company' (ID 106444). A modal window titled 'Confirmation' is open, displaying payment and agreement information. The modal includes a 'Close' button and a 'Print Agreement' button. A red arrow points to the 'Print Agreement' button. In the top right corner of the dashboard, a blue notification bar says 'Application Submitted' with a red arrow pointing to it.

Confirmation

Please submit your signed agreement form as quickly as possible. Your review/survey will not be scheduled until ASME has received the signed agreement and your AIA has verified that they hold an agreement with you, if applicable.

Please remit your payment to:
 ASME
 Accreditation/Certification
 Processing Dept.
 150 Clove Road
 Little Falls, NJ 07424

Send your agreement to:
 ASME
 Conformity Assessment
 Department, 6th Floor
 2 Park Avenue New York, NY
 10016-5990

[Close](#) [Print Agreement](#)

Company Dashboard AIA Dashboard Testing Mestey

New Application

ABC Training Company
 Company ID 106444

Legal Name: ABC Training (ABCTD)

Plant Address: 2 Park Avenue
 New York, New
 United States
[edit](#)

Billing Address: 2 Park Avenue
 New York, New
 United States

Website: www.ctllc.com

[Policies](#) [Review](#)

Figure 372 - Submit non-BPV Application – Print Agreement

The **Accreditation/Certification Agreement** form is displayed. Enter the information on the bottom part of the form. When done, **Save** and **Print** the completed form. **Sign** the form and email the form to **ca@asme.org**.

The screenshot shows the 'Accreditation/Certification Agreement' form. It contains a paragraph of text explaining the agreement, followed by six numbered points detailing the terms. At the bottom, there are fields for 'Legal Company Name', 'Print Name', 'Signature', 'Title', 'Date', 'Application#', and 'Company ID#'. A footer note indicates the form version is GEN-FRM-01, Rev. 1, 11/13/2014.

Accreditation/Certification Agreement

The organization listed on this Application for Accreditation/Certification (the "Applicant") performs or subcontracts the design, fabrication, production, testing, assembly, construction and/or installation of items, or provides a service to the aforementioned activities, at the address given, and makes this application to The American Society of Mechanical Engineers (ASME) for the appropriate Certificate of Authorization or other conformity assessment certificate, which, if applicable, permits the use of the Certification Mark. The Applicant:

- (1) Agrees to use the Certificate and Certification Mark, if applicable, in accordance with the applicable ASME Code or Standard and supplemental conformity assessment requirements governing this application.
- (2) Agrees to return the Certification Mark Stamp and/or Certificate anytime ASME may so request, at the time the Applicant discontinues the work covered, or at the time the Certificate expires, if not renewed.
- (3) Accepts the conduct of announced or unannounced audits as required by the appropriate ASME accreditation/certification body. Access to the inspection site to conduct audits, reviews or surveys, including travel to and from the site, is the responsibility of the Applicant. If access to the site is blocked or impeded, or if the Applicant deliberately misrepresents information to ASME and its agents, then ASME is not responsible for the Applicant failing to receive or continue to have accreditation/certification.
- (4) Agrees to indemnify and hold harmless ASME and its agents from and against any costs (including legal fees and expenses) and any direct, indirect, incidental or consequential damages (including loss of profits or business opportunity) arising out of any claim or cause of action in any way related to this Agreement or the subject matter hereof, including but not limited to claims based on contract, tort (including negligence), strict liability or breach of warranty (express or implied).
- (5) Understands that the Applicant's use of the ASME Certification Mark may be allowed provisionally by ASME in its discretion until a decision is made on an appeal of an action of an ASME subcommittee, committee or board and accepts the obligation to pay all legal fees and expenses and ASME's cost for recovering the Certificate and stamp if not returned.
- (6) Agrees to pay ASME for all fees, expenses and expenditures associated with the Review/Survey/Audit conducted by ASME.

Legal Company Name: _____

Print Name: _____

Signature: _____
Signature must be by a Company Officer or Designee

Title: _____

Date: _____

Application#: _____ Company ID#: _____

GEN-FRM-01, Rev. 1, 11/13/2014

Figure 383 - Submit non-BPV Application - Accreditation/Certification Agreement Form

12. Viewing Application

a. Application Number

To view the application on the Company Dashboard, click on the **Application Number**. You will be directed to the Application Details page.

ABC Training Company
Company ID 106444
Division: ABC Training Unit
Abbreviation: ABC TD
Website: www.abctraining.com
Legal name: ABC Training Company

Plant 2 Park Avenue
Address: New York, New York 10016
United States

Primary Contact: Jane Doe
Contact: doej@gmail.com
212-591-1000

[Apply for New/Renewal Certificate](#)

Application #	Program Type	Type	Application Status	Certificate Number	Designator	Status	Issuance Date	Expiration Date	Extension Date
118491	Boiler	New	Payment Due	Pending	A	Pending			
118491	Boiler	New	Payment Due	Pending	PP	Pending			

Figure 394 - View Application - Application Number

b. Application Details Page

The information on the Applications Details page is divided into multiple sections. The top section of the page contains the following details:

- Company information
- Certificate(s) associated with the application
- The ability to submit change requests
- Print Documents button
- Change Request button

ASME
APPLIED STANDARDS

Company Dashboard Certificate Holder Search A. Homer Garza

APPLICATION DETAILS

Application ID: 118491
Application Submitt

[Print Documents](#)

Company Name	Company ID	Type	Status	Program	AIA Agreement	Authorized Inspection Agency
ABC Training Company	106444	New	Pending	Boiler		

Additional Information

Primary Contact: Jane Doe
doej@gmail.com
212-591-1000

Plant Address: 2 Park Avenue
New York, NY 10016
United States

Mailing Address:

Billing Address: 2 Park Avenue
New York, NY 10016
United States

[Change Request](#)

Certificates

Designator	Number	Scope	Status	Certificate Type	Issued Date	Expiration	Extension	Type of Authorization
A	Pending	Assembly of power boilers at field sites controlled by the above location	New					Boiler
PP	Pending	Fabrication and assembly of pressure piping at the above location only	New					Boiler

Figure 405 - View Application - Application Details – Top Section

The middle section of the page has multiple tabs and defaults to the **Billing** tab. This section provides information relating to the following:

- **Billing Tab:** Proforma Invoice, Remittance Information, and Banking Information.
- **Schedules Tab:** Review/survey scheduled details, access to itinerary.
- **Documents Tab:** Application related uploaded documents.

The screenshot shows the 'Billing' tab selected. It contains three main sections: Finance, Invoices, and Remittance Information.

Finance

Proforma Amount	Amount Due	Amount Received	Balance Due
Please See Invoice(s)	Please See Invoice(s)	-	Please See Invoice(s)

Invoices

Customer Number	Document Number	Comment	Document Sub Type	Document Date	
106444	CRM118491	Boiler	CACERTS	2016-07-22-T00:00:00	Download

Remittance Information

International Funds Transfer - Please remit payment in U.S Dollars to:

JP Morgan Chase N.A.
 ABA: 111111111, CHIPS Participant Number: 0002
 or SWIFT: CHASUS33
 Credit The American Society of Mechanical Engineers (ASME)
 Account # 22222222
 Reference: Invoice #

Applicants must remit payment (i.e checks, money, orders, electronic, funds transfers, etc.) to:

ASME
 Accreditation/Certification Processing Dept.
 150 Clove Road
 Little Falls, NJ 07424

Applicants may send hardcopy Print Agreements and Applications **without** payment information to:

ASME
 Conformity Assessment Department, 6th Floor
 2 Park Avenue
 New York, NY 10016-5990

Figure 416 - View Application - Application Details – Middle Section

Schedules tab displays review/survey related information such as review/survey start and end dates, lodging, airports, hotels and plant location. This section provides information relating to the following:

- **Google Map** - a map view of the Hotel, Airport, and Plant location, including arrival information
- **Print Itinerary** button will generate a pdf containing all the important details of the upcoming review/survey

The screenshot shows the 'Schedules' tab selected. It contains the following information:

Review/Survey Dates
 Nov 27, 2014 - Nov 30, 2014
Earliest Date Available for Survey
 12/23/2014, 5:00 am
Unacceptable Dates
 12/25/14 and 12/26/15

[Print Itinerary](#)

Review/Survey Type
 Certificate Review

Review Authority
 National Board SPV

Team Leader
 Arthur Adkins

Team Members

Pre-Review/Survey Meeting
Team Arrival
Review/Survey Start
 11/27/2014, 12:00 am
Review/Survey End
 11/30/2014, 12:00 am
of Manuals to be Submitted
 Not Specified

Map: A Google Map of the New York City area with three overlays:
 - **Lodging:** Staten Island Inn, 3420 Staten Island Road, Staten Island, New York. Phone: 347-222-3333.
 - **Airport:** Kennedy Airport Queens.
 - **Plant:** Boilers Incorporated, Plant Address 1, Staten Island, New York - United States.

Figure 427 - Schedules Tab

Documents tab shows documents that have been uploaded to the application. The documents are uploaded to the predefined folders shown below. You can download the document by clicking on the **Download File** link associated with the document.

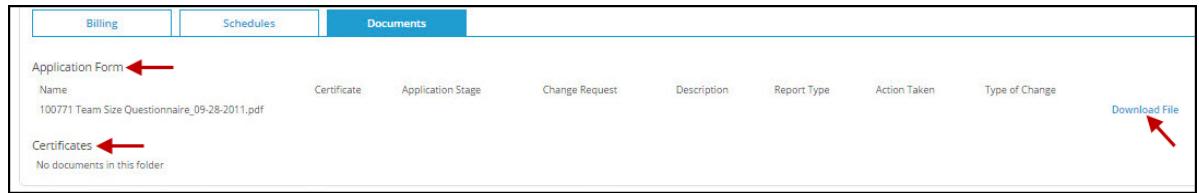


Figure 438 - Documents Tab

13. Print Documents

a. Print Application

To print the application, click on the **Print Documents** button then click on the **Print Application** link. The completed application will be displayed on the screen as a pdf for you to view and print.

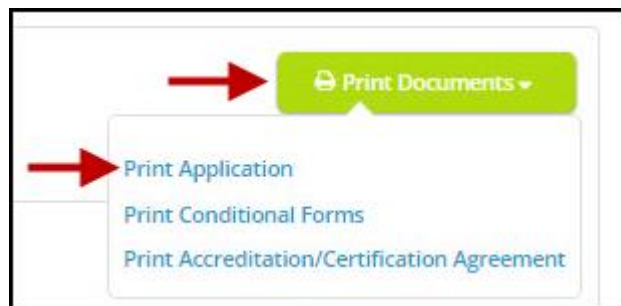


Figure 49 - Create Application – Print Application

b. Print Conditional Forms

A **Conditional Form** is generated for **non-Boiler** programs only. To print the Conditional Form, click on the **Print Conditional Forms** button which will direct you to the **Downloadable Resource** page. The conditional forms will be located under the **General Download Form**.



Figure 440 - Create Application – Print Conditional forms

c. Print Accreditation/Certification Agreement

Click on the **Print Accreditation/Certification Agreement** button to generate and print the **Accreditation/Certification Agreement** Form (see Figure 31). Enter the information on the bottom part of the form. When done, **Save** and **Print** the completed form. **Sign** the form and emailed the form to ca@asme.org.

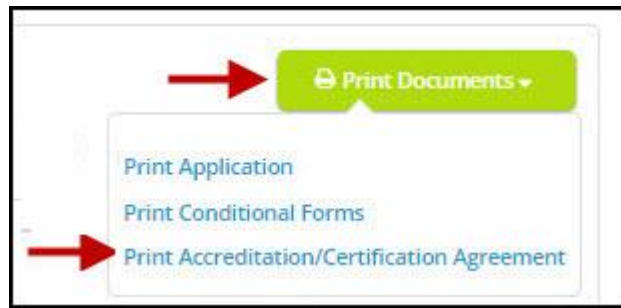


Figure 451 - Create Application – Print Accreditation/Certification Agreement

14. Change Request

To submit a change request on the application, click on the **Change Request** button.

APPLICATION DETAILS

Application ID: 118491
Application Submitted Date: Mon, July 20th 2015

Print Documents

Company Name	Company ID	Type	Status	Program	AIA Agreement	Authorized Inspection Agency
ABC Training Company	106444	New	Pending	Boiler		

Additional Information

Primary Contact: Jane Doe
doej@gmail.com
212-591-1000

Change Request

Figure 462 - Change Request

A **Change Request** window will be displayed for you to specify your request for a change. Click on the **dropdown** option to choose the type of change request. Specify the changes in the labeled textboxes. When done, click on the **Submit Change Request** button.

Change Request

* Change Request: Choose a change request

* Specify Changes:

* Reason for Change Request:

Submit Change Request

Change Request

* Change Request: Name Change

* Specify Changes:

* Reason for Change Request:

Submit Change Request

Figure 473 - Change Request Window

15. Email Notifications

Email notifications are automatically sent to you by the system relating to applications and certifications. To access your email notifications, click on the **envelope** icon on the upper right-hand side of your dashboard. You will be directed to your mailbox which contains a list of all your notifications.

To open and read the email, click on the **Subject** email link. You can also click on the **Application Number** to view the application details.

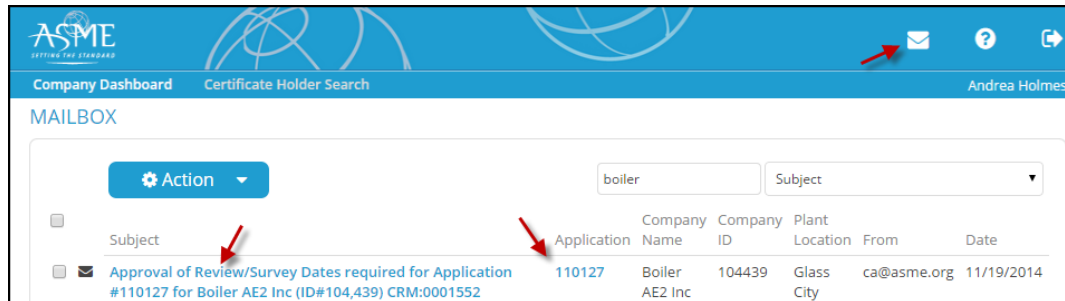


Figure 484 - Email Notification

a. Email Notification Search

You can **Search** the system for a particular email by

- Subject
- Application Number
- Company Name
- Company ID
- Past Location
- From
- Sent Date

Click on the **down arrow key** and select one of the search options listed. Enter the search criteria that is affiliated with the selected option in the **Find** text box to begin the search. The results will filter as you type.

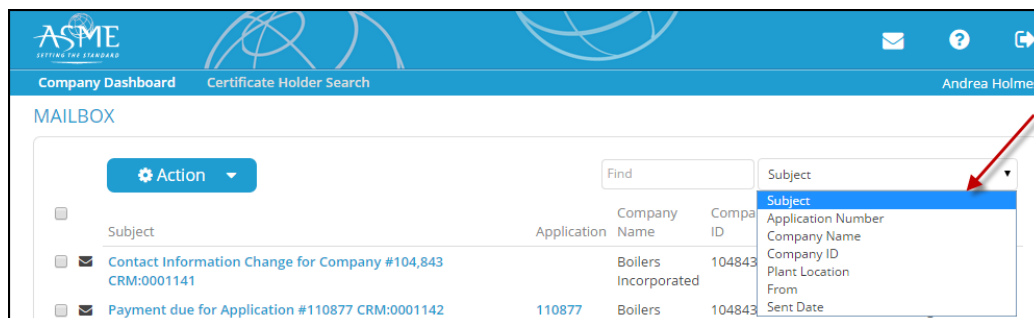


Figure 495 - Email Notification Search

16. Online Help

The **Go To Help** provides descriptions of features, links, and step-by-step instructions about the user interface components. The **Question Mark** on the upper right hand side of your dashboard represents the **Go To Help**. Click on the **?** symbol to access the online help.

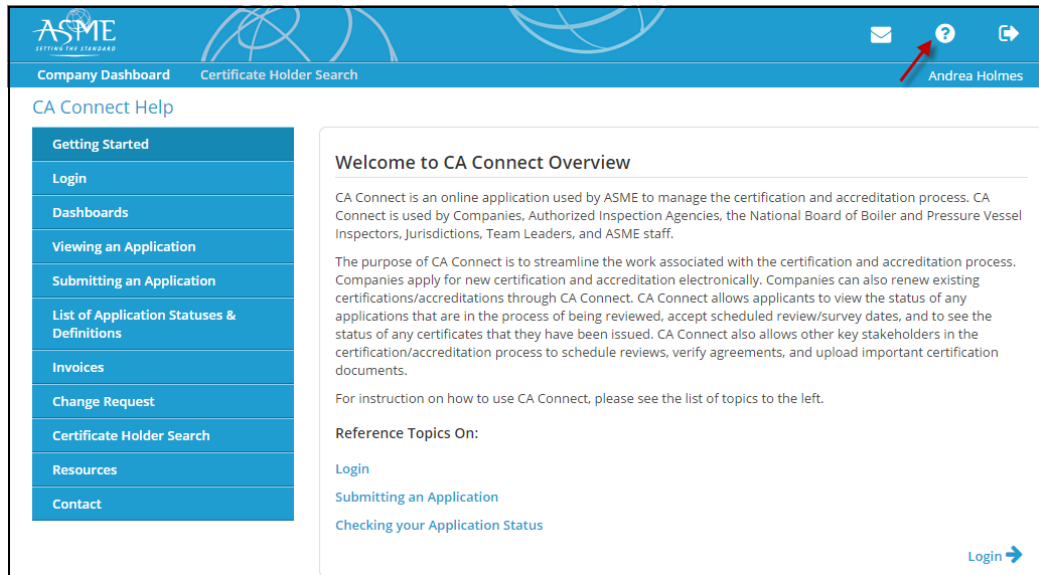


Figure 50 - Online Help

17. Logout

To logout of the system, click on the **Logout** icon depicted below. You will receive a confirmation message stating **you have been successfully logged out**.



Figure 517 - Logout

18. Customer Support

For problems Logging In call (212) 591-7575. For any concerns regarding your applications and certificates email ca@asme.org.