

ASME Conformity Assessment

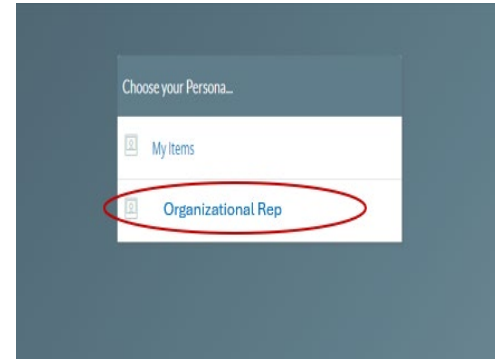
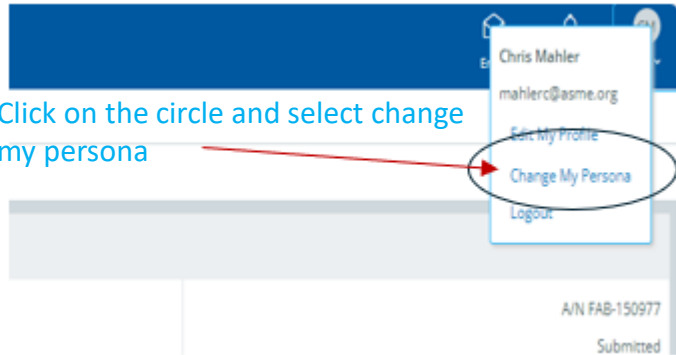
Changing Primary Contact

If you do not see your dashboard, you may be in the wrong persona.

After logging into CA Connect, if you do not see your dashboard, locate the circle with your initials on the far right of the screen



Click on the circle and select change my persona



Select Organizational Rep and this will bring you top your dashboard

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**.

- ✓ 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.

The screenshot displays the ASME CA Connect Training Company dashboard. The navigation bar includes Home, Profile, Processes, Applications, Certifications, Documents, Emails, and New Company. The main content area is divided into several sections:

- Home:** A blue circle icon with a plus sign is highlighted by a red arrow. Below it, text reads: "You are assigned to more than 1 Company. Click here to select a different Company".
- Company Profile:** Details for "ASME CA Connect Training Company" (111011) are shown, including location (New York, New York, United States), website (www.training.com), and primary contact (Jane Smith).
- Actions:** A blue box labeled "Actions" is highlighted by a red arrow. It contains two links: "New Change Request" and "New Company".
- CHANGE REQUESTS:** A section with a blue circle icon containing a plus sign, highlighted by a red arrow. It includes a "Select process..." dropdown menu, an "Application" field (optional), and "Create" and "Cancel" buttons. Below this, a progress indicator shows "Change Request: Company Name Change" is "In Progress on 06/12/2019" with a 50% completion circle.
- Applications:** A table with columns for Type, Status, and Activities. One application is listed: "Application: FAB-131534" with Type: Boiler, Status: Open, and Activities: 0.
- Certifications:** A section showing "0 No Certifications" and "No certifications available at this time".

✓ 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.

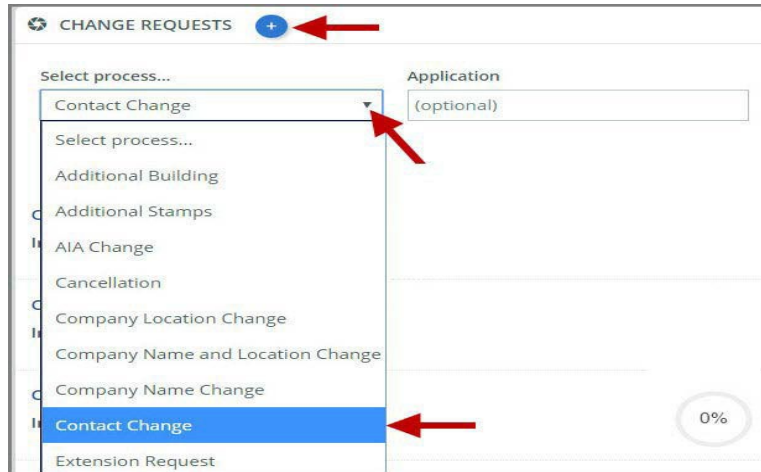
- Additional Building
- Additional Stamps
- AIA Change
- Cancellation
- Company Location Change
- Company Name and Location Change
- Company Name Change
- Contact Change
- Extension Request
- Financial Information Change
- Other Change Request
- Postal Re-Designation Change
- Scope Change
- Temporary Shop Request

This session will focus on
Contact Change

Contact Change

If the information for one of the Primary Company Contact and/or Trusted Contacts changes, select the Contact Change request process.

- Click the **Change Request blue (+) icon**.
- Under **Select Process**, click the **down arrow icon** to display a selection list for the change request.
- Scroll through change request list and select **Contact Change**.



✓ 4. Click Create.

- ✓ The system will direct you to the **Processes** page. Under the **Submission and Initial Review** section of the page, select the **Create Form** link.

CHANGE REQUESTS +

Select process... Application

Contact Change (optional)

Create

- ✓ 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

1. *Effective Date*
2. *First and Last Name of Existing Contact*
3. *Does contact name need update? (select Yes or No)*
4. *Does contact email address need update? (select Yes or No)*
5. *Does a contact phone need update? (Yes or No)*
6. *Updated First and Last Name (if applicable)*
7. *Updated Email Address (if applicable)*
8. *Updated Business Phone, including country and area codes (if applicable)*
9. *Updated Fax Number, including country and area codes (if applicable)*
10. *Updated Mobile Phone, including country and area codes (if applicable)*

Submission and Order Creation

| Status | Item | Assignee |
|-----------------------|------|----------|
| Submission Data | | |
| Change Request Detail | | |

Change Request Detail

Overview Comments

Due 07/15/2019

Please submit all requested information:

| Item | Form |
|----------------------------|--|
| Contact Information Change | Please provide the relevant information for the contact information which needs updating. 06/15/2019 11:11:56 am Remove |

In Progress

Mark as "Not Started"

Complete

- ✓ When done, click **Save** to continue.

Form

Instructions: Please provide the relevant information for the cont

Effective Date

Master Customer ID (optional)

First and Last Name of Existing Contact

Does contact name need update?
 Yes No

Does contact email address need update?
 Yes No

Does a contact phone need update?
 Yes No

Updated First and Last Name (if applicable)

Updated Email Address (if applicable)

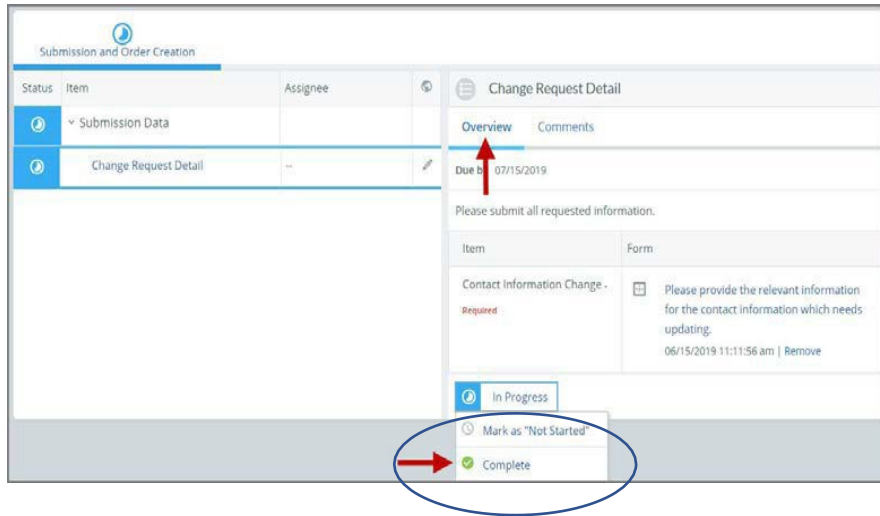
Updated BUSINESS phone (including country and area codes) (if applicable)

Updated FAX number (including country and area codes) Updated MOBILE phone (including country and area

Save Cancel

- ✓ You will be directed back to the previous page where the information you entered on the form is displayed.
- ✓ **Optional:** If you want to enter a comment follow the steps below. Otherwise, skip this step.
 - ✓ Select the **Comments** link.
 - ✓ Click the **+Comment** link.
 - ✓ Enter the Comments in the text box provided.

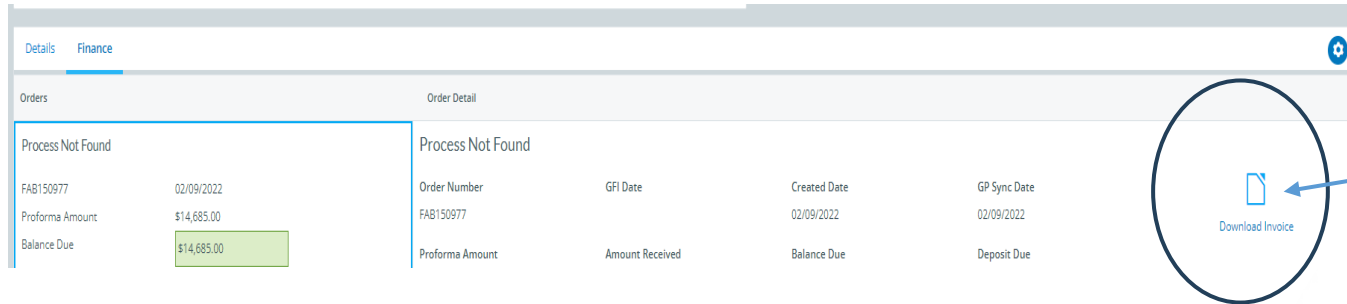
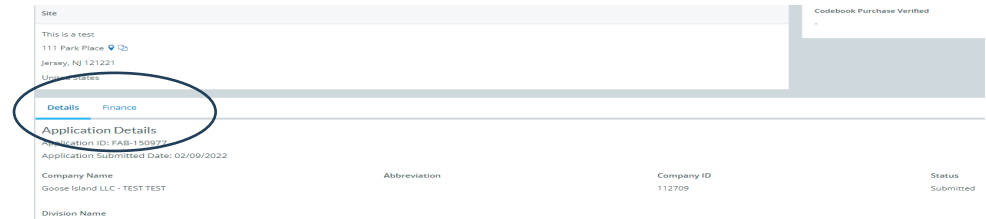
When done, click **Save** to continue.



- ✓ 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 Progress** blue half-moon icon.
 - b. Select **Complete**.

Locate your Invoice

In the middle of the application page will be two icon, “Details” & “Finance” – After they application is submitted, select Finance



Selecting the “Download Invoice” icon on the upper right side the screen, will download a copy of your proforma invoice

Please Note – Your application is “completed” and your audit scheduled after all deposit fees are received.

Payment Options and Instructions

Acceptable methods are:

- » Wire Transfer/ACH Payments
- » Credit Card - All credit card processing forms must be submitted either by fax to the number listed on the form itself or to our accounting team's secure share folder. Both methods submit the credit card information directly to our accounting team and ensure that no unauthorized personal can view your credit card information. Credit Card form and download site are at <https://www.asme.org/certification-accreditation/asme-certification-process/price-guide>

Please **DO NOT** submit any financial information by email. All credit card forms received by email will be deleted upon receipt without being opened in accordance with our protocol on customer financial security.

Resources

Downloadable Resources can be found on:

<https://www.asme.org/certification-accreditation/resources-and-events/downloadable-resources>

General Downloads Notices

- Conduct
- Due Process
- Notice on Requests for Certificate Extensions
- Notice on Use of Electronic Version of the Boiler Pressure Vessel Code by Certificate Holders
- Policy on the Use of the Certification Mark in Advertising
- How to Change Primary Contact Information
- CA-1 2022

Downloadable Resources:

<https://www.asme.org/certification-accreditation/resources-and-events/downloadable-resources>

General Downloads Forms

- Accreditation and Certification Agreement Form
- Criteria for Reapplication of a Certification Mark
- Nuclear Component Supplemental Application Form
- Nuclear Material Organization Supplemental Application Form
- Form G – Supplemental application form for the Authorized Inspection Agency Accreditation Program
- Form P – Supplemental application form for the Bioprocessing Equipment Certification Program
- Form Q – Supplemental application form for the Nuclear Quality Assurance Certification Program
- Form R – Supplemental application form for the Reinforced Thermoset Plastic Certification Program
- Form V – Supplemental Application for Quality Program System

Boiler and Pressure Vessel (BPV) Certification Forms

- BPV "General" Checklist
- BPV "Cast Boilers" Checklist
- BPV "Pressure Relief Devices" Checklist
- BPV "RP" Checklist
- BPV Product Certification Program Informational Handbook (New Applicants and Renewals)
- Process to Request Name Change on Certificate(s)
- BPV Certificate Scopes
- Notice Concerning National Board "R" Stamp
- Procedure For Adding Additional Building Location To Current Certificate
- Temporary Location Used by Certificate Holders
- Expedited Joint Reviews for the Boiler and Pressure Vessel Certification Program for Reviews Conducted by ASME Only

Downloadable Resources:

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Data Report Forms

- Bioprocessing Equipment (BPE) Certification Forms
- BPE Application – Information and Procedures
- BPE Quality Management System Checklist
- Form P – Supplemental application form for the Bioprocessing Equipment Certification Program.

Nuclear Component Certification Forms

- Material Organization Checklist
- Nuclear Component Application and Price Information
- Nuclear Component Checklist
- Nuclear Owner's Application and Price Information
- Nuclear Owner's Checklist
- Polyethylene Material Organization Checklist
- Nuclear Component Pre-survey Questionnaire
- Procedure for Renewal of Nuclear Owner's Certificates
- Nuclear Component Supplemental Application Form.

Downloadable Resources:

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[Nuclear Quality Assurance Certification Forms and Resources](#)

- Nuclear Quality Assurance (NQA) Application – Information and Price
- Nuclear Quality Assurance (NQA) Checklist
- Requirements for ASME Nuclear Quality Assurance (NQA) Certification
- Notice on Nuclear Quality Assurance (NQA) Program Certificate Scope Statements
- Form Q – Supplemental application form for the Nuclear Quality Assurance Certification Program.

[Nuclear Certification Additional Information](#)

- Applicant Information Handbook
- Notice on Nuclear Scope Statements
- Procedure for Name Change on Nuclear Component Certificate

[Nuclear Material Organization Certification Forms](#)

- Material Organization Application and Price Information
- Guide for Quality System Certificate/Material Organization
- Guide for Polyethylene Material Organization
- Material Organization Pre-survey Questionnaire
- Nuclear Material Organization Supplemental Application Form

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Reinforced Thermoset Plastic (RTP) Corrosion-Resistant Equipment Forms

- RTP Application and Price Information
- RTP Checklist
- Form R – Supplemental application form for the Reinforced Thermoset Plastic Certification Program.

Authorized Inspection Agency (AIA) Forms and Resources

- AIA Application and Price Information
- AIA Checklist
- List of Authorized Inspection Agencies (AIAs)
- QAI Interpretations
- Form G – Supplemental application form for the Authorized Inspection Agency Accreditation Programs

Pressure Relief Device (PRD) Testing Lab Forms and Resources

- PRD Application and Price Information
- PRD Checklist

*If you have any issue or questions,
please contact us at your
convenience.
ca@asme.org*