

A large, faint watermark of the ASME logo is centered in the background, featuring a globe and the text 'ASME' and 'SETTING THE STANDARD'.

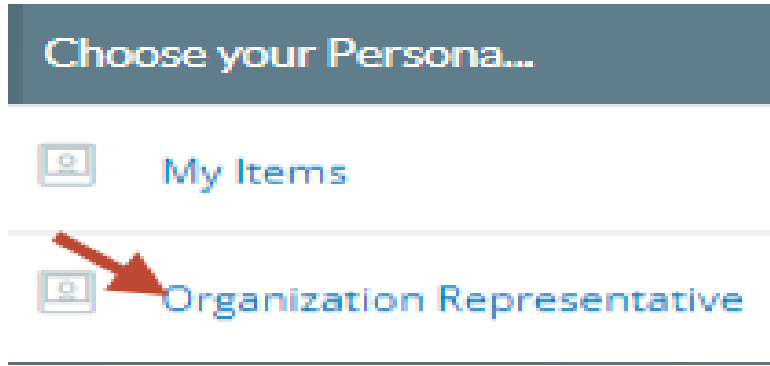
# ASME

# Standards and Engineering Services

# CA Connect Cancellation

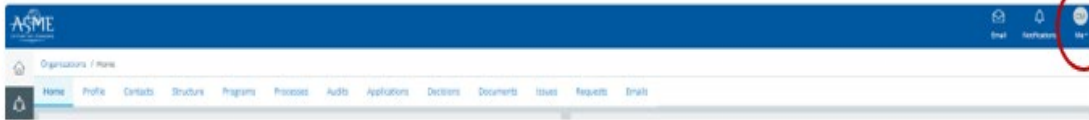
Upon CA Connect login, please select “Organizational Representative.”

This selection will direct you to the Company Dashboard, which provides you with all related Company events and activities pertaining to application for certification.

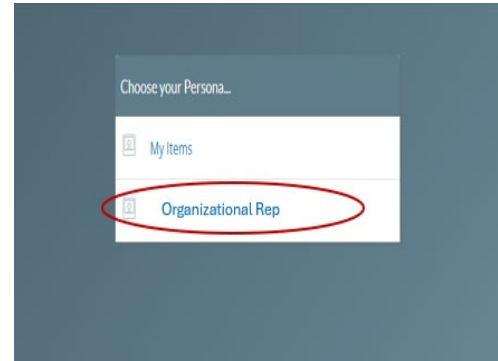
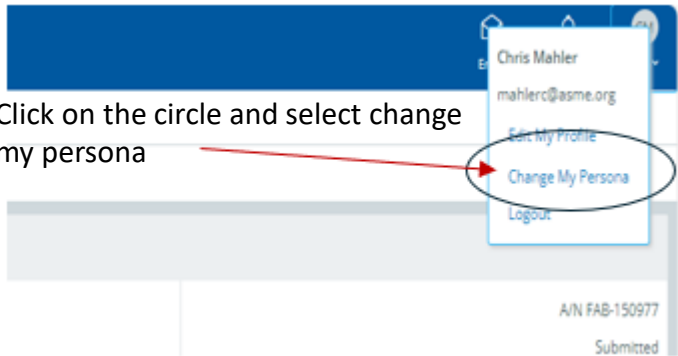


# If you do not see your dashboard, you may be in the wrong persona.

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**,

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.

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

- Company Information:** ASME CA Connect Training Company (111011), New York, New York United States, www.training.com, Primary Contact Jane Smith (jsmith@training.com, +1 (212) 5911111).
- Actions:** A blue box containing links for New Change Request and New Company. A red arrow points to the New Change Request link.
- Change Requests:** A section with a blue (+) circle icon. A red arrow points to this icon. Below it, there is a form to "Select process..." and "Application (optional)", with "Create" and "Cancel" buttons. 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, Type: Boiler, Status: Open, Activities: 0.
- Certifications:** A section showing "0 No Certifications" and "No certifications available at this time".

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.

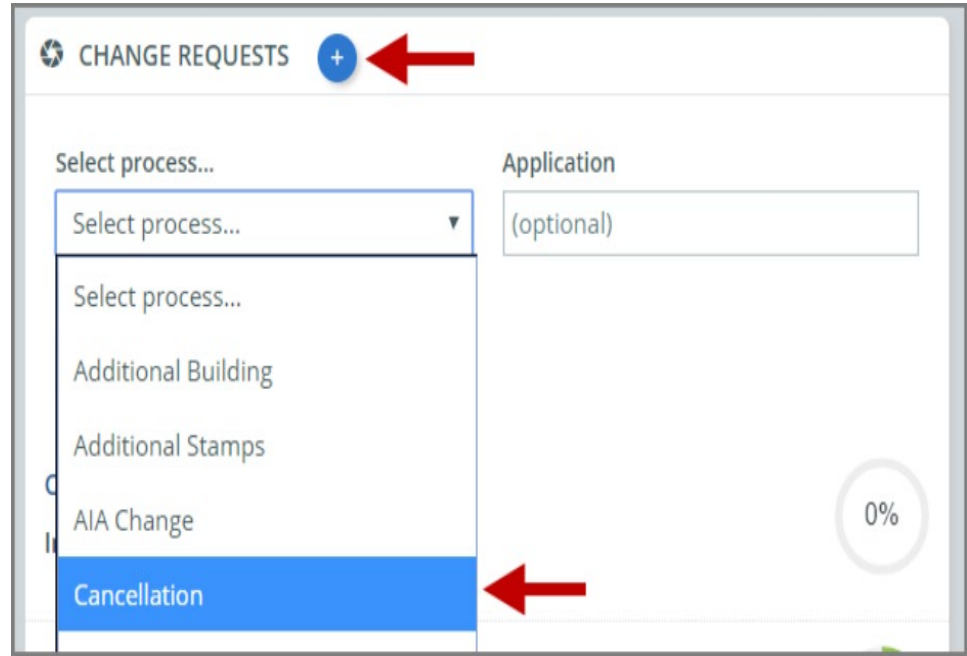
- [Additional Building](#)
- [Additional Stamps](#)
- [AIA Change](#)
- [Cancellation](#)
- [Company Location Change](#)
- [Company Name and Location Change](#)
- [Company Name Change](#)
- [Contact Change](#)
- [Extension Request](#)
- [Financial Information Change](#)
- [Other Change Request](#)
-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

This session will focus on  
Cancellation

## 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.

The screenshot displays a web interface for 'Submission and Initial Review'. At the top, a red arrow points to the header 'Submission and Initial Review'. Below this is a table with columns for 'Status', 'Item', and 'Assignee'. The table contains two rows: 'Submission Data' and 'Change Request Detail'. To the right of the table is a sidebar with a 'Change Request Detail' section, including 'Overview' and 'Comments' tabs, a 'Due by' date of 07/15/2019, and a note: 'Please submit all requested information.' Below this is a table with columns for 'Item' and 'Form'. The 'Cancellation Submission Form' row has a 'Create Form' link, which is highlighted by a red arrow. At the bottom left of the sidebar, there is an 'In Progress' indicator.

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.

The screenshot shows a 'Form' window with the following elements:

- Are you requesting that the scheduled review be rescheduled to a later date, or simply cancelled?**: A dropdown menu with a red arrow pointing to it.
- Postponement: Requested Start Date**: A date picker field with a red arrow pointing to it.
- Postponement: Requested End Date**: A date picker field with a red arrow pointing to it.
- Start Date of Currently Scheduled Review**: A date picker field with a red arrow pointing to it.
- Please describe the reason for cancellation or postponement.**: A rich text editor with a toolbar (B, I, U, S, x<sub>2</sub>, x<sup>2</sup>, T) and a 'Start Typing' placeholder with a red arrow pointing to it.
- I acknowledge that cancellation or postponement will result in a charge of a cancellation fee, per the ASME policies below.**: Radio buttons for 'Yes' and 'No', with a red arrow pointing to the 'No' option.
- Policies**: A text box containing the text 'Please review the policies at the links below. NEED L'.
- Save** and **Cancel** buttons at the bottom right, with a red arrow pointing to the 'Save' button.



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.

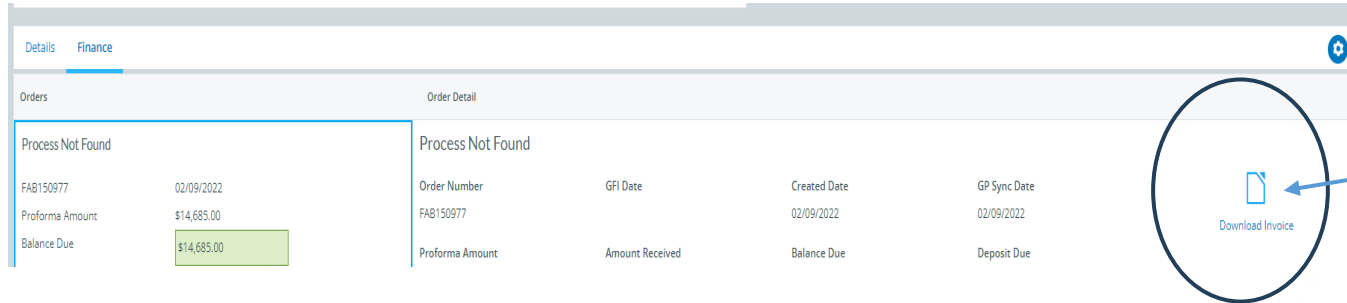
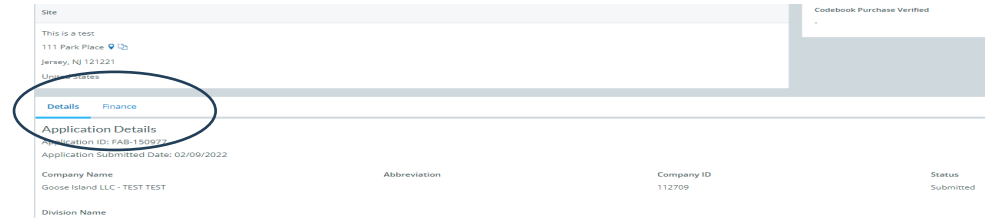
The screenshot displays the 'Submission and Initial Review' interface. On the left, a sidebar contains a tree view with 'Submission Data' and 'Change Request Detail'. The main area shows the 'Change Request Detail' page with 'Overview' and 'Comments' tabs. A '+ Comment' link is visible, and a text box for entering comments is located below it. At the bottom right, there are 'Save' and 'Cancel' buttons.

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**.

# 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 “complete” 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-accrreditation/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

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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.

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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



# Downloadable Resources:

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

## **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*