CA Connect

ASME Customer User Guide

March 9, 2021

Version 1.5

About CA Connect	1
Who uses CA Connect?	1
CA Connect Access	1
Create New Primary Contact Account	2
Create New Company Account	5
New Contact Email Verification	7
Create New Trusted Contact Account	8
Create New Contact – Associate to Existing Company	9
Log in As Registered Contact	11
Forgot / Change your Password	12
Choose Your Persona	12
Company Dashboard	14
Create New Application	15
AIA Program – New Application	15
Boiler Program – New Application	24
BPE Program – New Application	36
NQA Program – New Application	46
Nuclear Program (Corporate) – New Application	56
Nuclear Program (Corporate and Sites) – New Application	66
PRD Program – New Application	78
QSC Program (Corporate) – New Application	91
QSC Program (Corporate and Sites) – New Application	101
RTP Program – New Application	113
Create Renewal Application	122
AIA Program - Renewal	122
Boiler Program – Renewal and New Application	132
BPE Program - Renewal	142
NQA Program – Renewal and New Application	154
Nuclear Program – Renewal and New Application	165
PRD Program – Renewal and New Observer Application	176
QSC Program – Renewal and New Application	191

Contents

RTP Program – Renewal and New Application	202
In Process Application	213
Applications Details:	213
Certification Details:	213
Finance Details:	213
View Upcoming/Scheduled Reviews/Surveys	214
Scheduling Details:	214
Change Requests	214
Additional Building	215
Additional Stamps	218
AIA Change	221
Cancellation	223
Company Location Change	226
Company Name and Location Change	228
Company Name Change	231
Contact Change	234
Extension Request	237
Financial Information Change	240
Other Change Request	243
Postal Re-Designation Change	245
Scope Change	248
Temporary Shop Request	251
Search Certificate Holders	254
Logout	256
ASME Program Administrator Assistance	256

ii

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:

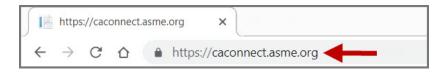
- Company Certificate Holders
- Primary Company Contacts
- Trusted Company Contacts
- ASME Consultants
- AIA Contacts
- National Board of Boiler and Pressure Vessel Inspectors
- Jurisdiction Contact
- ASME Conformity Assessment Administrative and Technical Staff

This 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

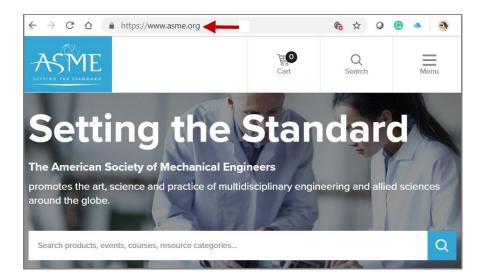
Before you start using CA Connect, you need to be registered with an account in CA Connect prior to beginning the application submittal process. There are two ways in which you can access the system.

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**

1



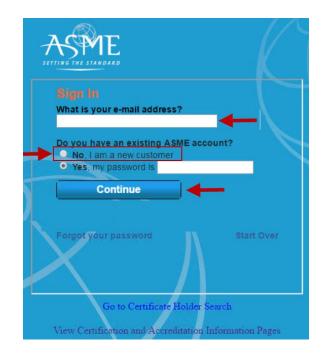
- b. Scroll down to the bottom of the page.
- c. Click the caconnect link on the page.
- d. You will be directed to the CA Connect Sign In page.

About ASME	Certification & Accreditation
Media Inquiries	Start a Certificate Application
Contact Us	Find a Certified Company
Careers at ASME	CA Connect
Advertising & Sponsorships	Resources & Events
Codes & Standards	Learning & Development
Find Codes & Standards 🛛 🗹	Find Courses
About Standards	About Learning & Development
in y 🖬 🖸	Learning Experiences

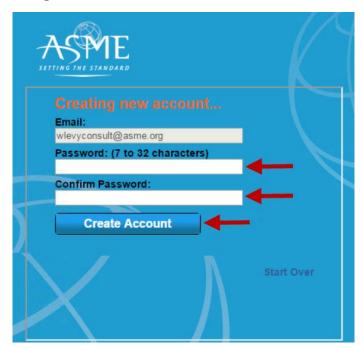
Create New Primary Contact Account

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.

reate Cor					
Primary Email		rmation			
jsmith@trail					
Salutation		ose Salutation			
	choc	ise salutation			
First Name					
Middle Name					
Last Name					
Title					
DI					
Phone					
Business	+	Phone Num	ber	ext.	
Mobile	+	Phone Num	ber		
Fax	+	Phone Num	ber		

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

4

Create New Company Account

1. On the **Company Search** page, click the blue circle (+) **Add** icon used to add a new company.

ASPME					
Contact Registration					
Return to Contact Inform Company Search	nation		Ažz ~		->•
Search		Q			
COMPANY NAME	ADDRESS LINE 1	CITY	STATE	COUN	
CA Connect Training Company	25 Broome St.	New Y	'ork NY	United States	

- 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
 - o Company Name
 - Legal Company Name
 - Program Types.
 - Plant Address
 - o Address Line 1
 - o Country
 - o City
 - o Zip/Postal Code
- 3. When done, click **Confirm**.

me Profile Processes Appl	ications Certifications Documents	Emails New Company
Company Information Company Name	Plant Address Address Line 1	Mailing Address Address Line 1
Legal Company Name	Address Line 2	Address Line 2
Abbreviation	+ Add Line 3 Country	+ Add Line 3 Country
Division Name	Select Country	Select Country
	City	City
Company Website		Par theory in the state
	Zip/Postal Code	Zip/Postal Code
Program Types Select Program Type		

- 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.

Please review the addresses below.	
Plant	
USPS Validated	You Entered
10 Main St	10 Main St 오 🖓
Poughkeepsie, NY 12601	Poughkeepsie, NY 12603
United States	United States
Use Valid USPS Address	
	Save Cancel

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.

ASME		٩	WT
Contact Registration			
	Your account has been created and associated to the company requested. You'll receive a validation email with URL. Follow link to validate, after which you can login and access the system. Please contact ASME administrator (CA@asme.org) with any questions.		

- 2. Locate and open the email that was sent to you.
- 3. Click the validation link contained in the email to authenticate your account.
- Once you validate your email address, return to CA Connect and <u>login as a registered</u> <u>contact</u>.

imail	×
4 4	
Reply Forward	
ca@asme.org	2 hours ago
CA Connect Registration	
Your registration on CA Connect has been confirmed. Please follow this	validation link to confirm account creation and gain access to
the system.	R.
If you encounter any problems, please contact ASME administrator ca@a	asme.org with any questions.
	Cancel

7

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.

Profile Info	Contacts		
Search		Q	Ŷ ^ ÂZ v
-			
-		0	l
Add New Co John Tra Edit		9	
John Tra	aining	0	

- 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.

First Name	Last Name					
First Name	Last Name					
Email Address						
Email Address						
Title						
Contact Title						
		Prim	Phone			
Primary Contact	n	Prime + 1	Phone	Phone Number	ext.	Extension
Primary Contact Additional Informatio Credentials Credentials	n Master Customer ID	_	Phone	Phone Number	ext.	Extension
Primary Contact Additional Informatic Credentials	Master Customer ID Master Customer ID	_	Phone	Phone Number	ext.	Extension

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.

TTTING THE STANDARD						÷.	G
ontact Registration	n						
Return to Contact I Company Sea							Ŧ
Myrna UAT	-	Q	Ąż	~			
Myrna UAT 🖣	ADDRESS LINE 1	С	A ⁱ Z STATE	~ COU			
Myrna UAT	ADDRESS LINE 1		•		Select		

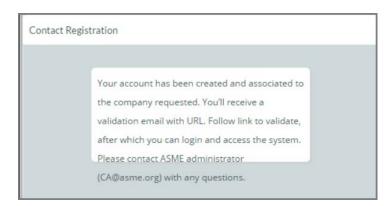
 The Confirm Company Association page is displayed which contains the question What is your relationship to the company? Two contact association options are provided for you to choose from.

Confirm Company Association	8
What is your relationship to the company? Primary Contact Non-Primary Contact	
	Confirm

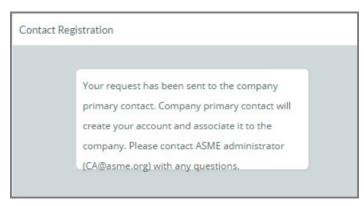
- a. Select the applicable contact relationship option.
 - i. If **Primary Contact** is selected, a second page is displayed requested that you **Please provide company ID** and **certification number as verification.**
 - 1. Enter the **Company ID**.
 - 2. Enter the **Certificate Number**.
 - 3. Click **Confirm** to continue.

Confirm Company Association	
Please provide company ID and certification num Company ID	ber as verification.
Certificate Number	_

 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.

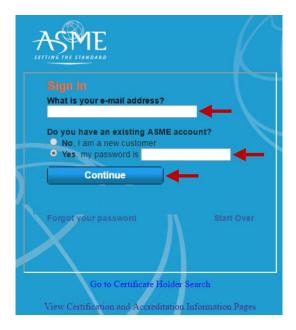


- ii. If Non-Primary Contact is selected, click Confirm to continue.
 - CA Connect will display the Contact Registration page which contains a validation email message. This message is sent to your registered email address (see New Contact Email Verification) to continue.



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.



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.

SETTING THE STANDARD	
Sign In	
What is your e-mail address?	- ∕ →
Do you have an existing ASME acco	ount?
• Yes, my password is	
Continue	-
Forgot your password	Start Over
Go to Certificate Holder S	earch
View Certification and Accreditation I	nformation Pages

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 <u>Company Dashboard</u>.



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).

AS	ME						Q	MT
Home	Notifications	My Profile	Processes	Applications	Documents			
My Iter	ms 🔶							
Not Start	ed - 0%	In Progress -	0%	Coming Due - 0%	b	Overdue - 0%		
0 Activit	ies							
There are	no actvities assigne	ed to you at this	time.					
Schedule	ed Items 🔶							
0 Sched	uled Items							
There are	no scheduled item	s at this time.						

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.

	ME					William Levison
lome	Notifications	My Profile	Processes	Applications	Documents	wlevison@asme.org Edit My Profile
Nilliar	n Levison	0				Change My Persona
	@asme.org 🖂					Logout

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.

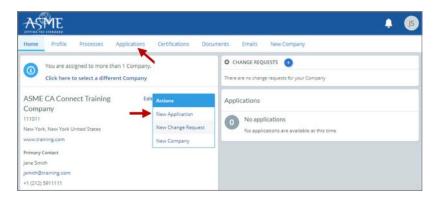
Create New Application

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.



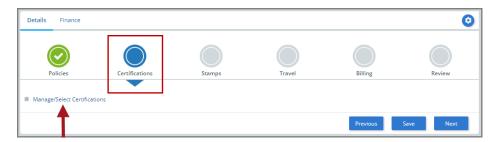
3. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.

Home	Profile	Processes	Applications	Certifications	Documents	Emails	New Company	
ASME 111011 New York	ς NY	nect Training	g Company	Primary Contact Jane Smith jsmith@training.cc +1 (212) 5911111	m			
Search.	-		Q	AZ ~				

- 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.
- 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.

ASME	¢ (§
Home Profile Processes Applications D	ocuments Emails New Company
ASME CA Connect Training Company 111011 New York, NY www.training.com +1 (212) 5911111 C	
Activities	Processes
No activities scheduled There are no activities scheduled for this application at this time.	No active Application Process No application processes have been started for this application.
Details Finance	٥
Policies Certifications Stamps	Travel Billing Review
Final Invoice For reviews/Surveys conducted by ASME, a final invoice will be rendered. It will co certificates and stamps cannot be issued until the invoice is paid.	ontain the fees and expenses of the ASME Designee. If there is a balance due to ASME,
Cancellation - Reviews/Surveys scheduled by ASME Cancellation of review/survey dates scheduled by ASME is subject to a monetary	penalty, deducted from the advanced deposit in the following schedule:
 \$2,000 for cancellation after acceptance of review/survey dates. \$3,500 for cancellation within 2 months of review/survey dates. \$6,000 for cancellation within 1 months of review/survey dates. 	
Extension Policy	
In order to be eligible for an extension of the expiration date stated on a Certifica received not later than six (6) months prior to the expiration date on the Certifica	ate, the renewal application and all applicable fees, including advance payments, must be ite.
	n date indicated on the Certificate. Furthermore, the Certificate Holder must indicate
available dates more than nine (9) weeks prior to the expiration date of the Certif	
If ASME cannot schedule the review/survey on the dates included, then an extens	
Please see the Policy on Request for Extension under General Downloads for mo	re information.
† I	Nest

- 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.

Certifica	ate Types 🗱
ltem	Certification
	AIA - Authorized Inspection Agency
1	

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

etails Finance					
\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Certifica	itions				
					- I
AIA					↓

- 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.

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Program Type					
AIA					
Upload Supplem	ental Form				
	lick the "Download Suppleme	ntal Form" button, then s	ave it to your computer as	a pdf file. Next, open the f	form, fill it out, and save
	o your computer as a pdf file.				
Please upload the con	npleted form via the "Upload :	Supplemental Form" butt	on located below the "Dow	nload Supplemental Form	" button.
Download Supple	emental Form				
1 Upload Suppleme	ental Form (PDF)				22
5. 550					1
				Previous Sav	ve Next

- 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.

	-			-	
\bigcirc	\odot	\odot			
Policies	Certifications	Stamps	Travel	Billing	Review
Travel Recommend	dation				
Location Name				Status	
ASME CA Connect Train	ning Company 🚽 🗕			Not Complete	
2 Park Avenue 9 🖻					
New York, NY 10016					
United States					
Add New Location					

- 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.

Travel Recommendation Detail	
* Indicates required fields	
Location Details	Hotel ©
Division Name	Name *
ASME CA Connect Training Company	
Address Line 1	Address *
2 Park Avenue	
Address Line 2	Country *
	Select Country
Country	City *
United States	
State	Zip/Postal Code
New York	
City	Phone *
New York	ext.
Zip/Postal Code	
10016	Fax
	Miles from hotel to site *
irport	Emergency Contact
lame *	Name *
ity •	Phone *
	+ ext.
liles from airport to hotel *	
ransportation *	
Select Transportation	*

- **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.

Please review the addresses below.	
Hotel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 오 🗅
New York, NY 10016	new york, NY 10013
United States	United States
Use Valid USPS Address	
-	Save Cancel

- **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.

Details Finance					0
\bigcirc	\bigcirc	\bigcirc			
Policies	Certifications	Stamps	Travel	Billing	Review
Fravel Recommend	dation				
Location Name				Status	
ASME CA Connect Train	ning Company			Complete	• .
2 Park Avenue 오 🗅					
New York, NY 10016					
United States					
Add New Location					+
A				Previo	us Next
				Previo	US NCAL

- **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.

\bigcirc	\bigcirc	\bigcirc	\bigcirc		
Policies	Certifications	Stamps	Travel	Billing	Review
Billing	cost associated with the revie	A 116	Internet will be enformed and		
	cost associated with the revie			2	
Billing Address Use Plant Address Use	Mailing Address		anking Details the following information to	allow ASME to	
ose manerical ess. ose	indian Brook cas		over remittance.		
Address Line 1		Company Bank			
Address Line 1		company ban	ang become		
Address Line 1		<u> </u>			
Address Line 2		Bank Account	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
Country		Billing Contact	Email		
Select Country	*				
City		Account Numb	er / IBAN #		
Zip/Postal Code		SWIFT Code / B	IC		
Contact/Attention		Bank Transit N	umber		
		-			
Phone Number		Tax ID Number			
none Number	ext.				
		1			
		Credit Card Pro			1
		pdf Credit Ca	ard Processing Form 🔫		

- **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.

Details Fin	ance				0
Policies	Certifications	Stamps	Travel	Billing	Review
	rvey are generally scheduled three t te ranges you provide allow for you				-
Earliest Date		Dates Unavailable Add	Dates		
-	he date selected should be a minimum three months from today's date		Start Date	End Date	
					Remove
Sister Locations					

- **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.

Travel edit 🗲 🗕			
Division Information	Hotel Information	Airport Information	Emergency Contact
1 Park Ave 💡 🗅	Marriott	JFK	Marc Anthony
New York, NY 10016	475 Park Avenue 💡 🗅	Queens	Phone: +1 (212) 5911234
United States	New York, NY 10016	Miles From Airport To Hotel: 1	10
	United States		
	Miles from Hotel to Site: 10		
	Phone: +1 (212) 2021234		
Billing edit 🔶 🗕			
Cradit Card Processing	orm		
Credit Card Processing I			

- **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.

	Previous Save
1 Upload Agreement Form	
Cownload Agreement Form	
Please upload only your completed Print Agreement Form. N	lo other forms should be submitted via this upload box.
Agreement" button.	
Scan the signed form and save it as a pdf file on your compu	ter. Finally, upload the scanned document via the upload box located below the "Print
Instructions: Please click the "Print Agreement" button, the	n save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Please print, sign and upload the Agreement F	orm
🛨 Upload Company Manual	
Please upload only your Company Manual. No other forms s	hould be submitted via this upload box.
Instructions: Upload your company manual via the upload b	box below.
Please upload your company manual	
Contact/Attention Email:	
Contact/Attention Name: Contxxx	
Tax ID Number:	
Bank Account Name:	
Bank Transit Number:	
Swift Code:	once soco
Account Number/IBAN #:	United States
ABA Routing Number:	New York, NY 10016
Bank Name:	1 Park Ave 🖗 🗅
Banking Details	Billing Address

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.



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.

ASME	€. (B
Home Profile Processes Applications Certifications Doc	uments Emails New Company
You are assigned to more than 1 Company. Click here to select a different Company	CHANGE REQUESTS There are no change requests for your Company
ASME CA Connect Training Company 111011 New York, New York United States www.training.com Primary Contact Jane Smith	Applications O No applications No applications are available at this time
jsmith@training.com +1 (212) 5911111	

3. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.

Home Profile Processe	Applications	Certifications Do	cuments Emails	New Company	
ASME CA Connect Train	ning Company	Primary Contact Jane Smith			
New York, NY		jsmith@training.com			
www.training.com		+1 (212) 5911111			
Search	q	AŽ v			-> 0

- 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.
- 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.

ASME	4 (3
Home Profile Processes Applications D	ocuments Emails New Company
ASME CA Connect Training Company Primary contact 111011 Jane Smith New York, NY jsmith@training.com www.training.com +1 (212) 5911111	
Activities	Processes
0 No activities scheduled There are no activities scheduled for this application at this time.	No active Application Process No application processes have been started for this application.
Details Finance	0
Policies Certifications Stamps	Travel Billing Review
Final Invoice For reviews/Surveys conducted by ASME, a final invoice will be rendered. It will co certificates and stamps cannot be issued until the invoice is paid.	ontain the fees and expenses of the ASME Designee. If there is a balance due to ASME,
Cancellation - Reviews/Surveys scheduled by ASME	
Cancellation of review/survey dates scheduled by ASME is subject to a monetary • \$2,000 for cancellation after acceptance of review/survey dates. • \$3,500 for cancellation within 2 months of review/survey dates. • \$6,000 for cancellation within 1 months of review/survey dates.	penalty, deducted from the advanced deposit in the following schedule:
Extension Policy	
In order to be eligible for an extension of the expiration date stated on a Certifica received not later than six (6) months prior to the expiration date on the Certifica	ate, the renewal application and all applicable fees, including advance payments, must be ite.
	n date indicated on the Certificate. Furthermore, the Certificate Holder must indicate
available dates more than nine (9) weeks prior to the expiration date of the Certil If ASME cannot schedule the review/survey on the dates included, then an extens	
Please see the Policy on Request for Extension under General Downloads for mo	
In the reviewed and agreed to the above policies.	
↑ I	Next

- 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.

Details Finance					(
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Certific	ations				
ites					
There are no additional s	ites or addresses related to this a	application (at this time)			
+ Site + Address					
				Previous	ave Next

- **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.

Certifica	ate Types	×
ltem	Certification	
	A - Power Boiler Assemblies	
	A (Additional 1) - Power Boiler Assemblies	
	A (Additional 2) - Power Boiler Assemblies	
	E - Electric Boilers	
	E (Additional 1) - Electric Boilers	
	E (Additional 2) - Electric Boilers	
	H1 - Cast Iron Heating Boilers	
	H1 (Additional 1) - Cast Iron Heating Boilers	
	H1 (Additional 2) - Cast Iron Heating Boilers	
	U.S. Charles Dations	
T	Apply Close	

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**.

Details Finance					
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Certifi	cations				
A Scope Statement C	noose Scopes				
tes					
here are no additional	sites or addresses related to thi	s application (at this time)			
Site + Address					

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 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.

Details Finance					
Policies	Certifications	Stamps	Travel	Billing	Review
i Manage/Select Certifi	cations				
A Scope Statement CH A-1 - Assembly of p	noose Scopes power boilers at field sites contro	illed by the above location			
ites There are no additional	sites or addresses related to thi	s application (at this time)			
+ Site + Address					1
				Previous Sa	ave Next

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 Seller** from the list by clicking on the down arrow.
 - a. To identify ASME as the Authorized Seller, select Other and enter ASME.
 - b. When proof of purchase cannot be located, upload the following statement which is to be signed, along with printed name and title, "I understand that if ASME cannot verify my purchase order for the required ASME codes and standards, ASME can and will withhold, suspend, or withdraw my certification."
- **19.** Select an **Authorized Inspection Agency** from the list of AIA Organizations by clicking on the down arrow. Select the Authorized Inspection Agency.
- 20. Enter the number of ASME Single Certification Marks you like to receive.
- 21. Check each checkbox that applies to the certification. The **Stamp Confirmed by Applicant** checkbox is required.
- 22. When done, click **Next** to continue.

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Program Type					
Boiler					
Authorized seller *					
Select Seller		~ ┥	-		
Deven helder "D" (
	Stamp with the National Board?				
Yes, I hold an "R"					
	Board "R" Certificate of Authorization, please ch		the national Board of Boiler and Pressu	re Vessel Inspectors Accreditatio	on Department at
1-614-888-8520 or Visit	their website to submit the "R" Stamp aplication				
Please be advised that i	f you are applying for both Boiler and Pressure V	alve certifications, you w	ill need to submit 2 separate application	ns, one for Boiler and one for Pre	essure Valve certifications.
	ion for both will result in processing delays. That				
Authorized Inspecti	on Agency *				
Select AIA Organizatio	n	~ <	←		
Stamp Selection *					
NEW APPLICANTS: Inc	licate the number of ASME Single Certification M	arks you would like to ree	ceive. Applicable fees, taxes and shippin	g charges will be assessed. Num	iber of Marks requested.
1/2" 0					
3/4" 0					
Please check here i	f you perform work that will require low stress st	amps.			
Stamps confirmed	by applicant.				T
T					
_				٢	revious Save Next

- 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.

* Indicates required fields	
Location Details	Hotel ©
Division Name	Name *
ASME CA Connect Training Company	
Address Line 1	Address *
2 Park Avenue	
Address Line 2	Country *
	Select Country
Country	City *
United States	
State	Zip/Postal Code
New York	
City	Phone *
New York	ext.
Zip/Postal Code	
10016	Fax
	Miles from hotel to site *
Airport	Emergency Contact
lame *	Name *
ity *	Phone *
	+ ext.
tiles from airport to hotel *	
etrastroven economic #convertententententententententententententent	
ransportation *	
Select Transportation	*

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.

Please review the addresses below.	
Hotel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 💡 🗅
New York, NY 10016	new york, NY 10013
United States	United States
Use Valid USPS Address	
	Save Cancel

- **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.

Policies	Certifications	Stamps	Travel	Billing	Review
ravel Recommen	dation				
Location Name				Status	
ASME CA Connect Trail	ning Company			Complete 🗲	- 3
2 Park Avenue 오 🗅					
New York, NY 10016					
United States					
Add New Location					-

- **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.

\bigcirc	\bigcirc	\bigcirc	\bigcirc		
Policies	Certifications	Stamps	Travel	Billing	Review
Billing					
-	r cost associated with the revie	w/survey. Any left over rem	Ittance will be refunded.		
Billing Address		Company B	anking Details ┥	-	
Use Plant Address Use	Mailing Address		the following information to	allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
Address Line 2		Bank Account I	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
Country		Billing Contact	Email		
Select Country	•	-			
City		Account Numb	er / IBAN #		
Zip/Postal Code		SWIFT Code / B	IC		
Contact/Attention		Bank Transit N	umber		
Phone Number		Tax ID Number			
•	ext.				
		Condition of the	and a fam.		
		Credit Card Pro	ecessing Form	_	1

- **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.

Details Finance					٥
\bigcirc	\bigcirc				
Policies	Certifications	Stamps	Travel	Billing	Review
View More	jes you provide allow for you	r keview/survey to be so		eeks (2.5 month) prior to your o	ertificate expiration.
Earliest Date	d be a minimum three month	s from today's date	Dates Unavailable Add I		
		is non today's date	Start Date	End Date	
_					Remove
Sister Locations					

- **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, 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.
- **46.** 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.
- **47.** You can also download the **Credit Card Processing Form**.

Travel edit	Hotel Information	Airport Information	Emergency Contact	
1 Park Ave 🎗 🖓	Marriott	IFK	Marc Anthony	
New York, NY 10016	475 Park Avenue 💡 🗅	Queens	Phone: +1 (212) 5911234	
United States	New York, NY 10016 Miles From Airport To Hotel: 10			
	United States			
	Miles from Hotel to Site: 10			
	Phone: +1 (212) 2021234			
Billing edit 🚽 🗕				

- **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.

Banking Details	Billing Address
Bank Name:	1 Park Ave 🛛 🖸
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please upload your company manual	
Instructions: Upload your company manual via the u	pload box below.
Please upload only your Company Manual. No other f	orms should be submitted via this upload box.
Upload Company Manual	
Please print, sign and upload the Agreem	ent Form
Instructions: Please click the "Print Agreement" butto	on, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your	computer. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement P	Form. No other forms should be submitted via this upload box.
Download Agreement Form	
1 Upload Agreement Form	L I
	Previous Save

54. 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.



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.

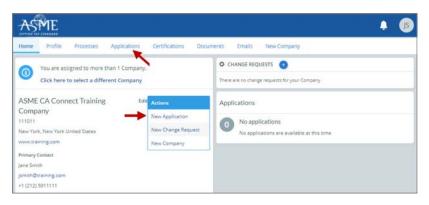


BPE Program – New Application

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.

ASME							A (15
Home Profile	Processes	Applications	Certifications	Documents	Emails	New Company	
ASME CA Col 111011 New York, NY www.training.com	nnect Training	g Company	Primary Contact Jane Smith jsmith@training.c +1 (212) 5911111	om			
Search		Q	AZ ~				→ 0
No resul There are		listed. Please refin	e your search criter	ia and try again.			

- 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.
- 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.

ASME	• (js
Home Profile Processes Applications Certifications	Documents Emails New Company
ASME CA Connect Training Company Primary contact 111011 Jane Smith New York, NY jsmith@training.co www.training.com +1 (212) 5911111 2	om
Activities	Processes
No activities scheduled There are no activities scheduled for this application at this time.	No active Application Process No application processes have been started for this application.
Details Finance	0
Policies Certifications Stamps	Travel Billing Review
Final Invoice For reviews/Surveys conducted by ASME, a final invoice will be rendered. It v certificates and stamps cannot be issued until the invoice is paid.	will contain the fees and expenses of the ASME Designee. If there is a balance due to ASME,
Cancellation - Reviews/Surveys scheduled by ASME	
Cancellation of review/survey dates scheduled by ASME is subject to a mone	etary penalty, deducted from the advanced deposit in the following schedule:
 \$2,000 for cancellation after acceptance of review/survey dates. \$3,500 for cancellation within 2 months of review/survey dates. \$6,000 for cancellation within 1 months of review/survey dates. 	
Extension Policy	
In order to be eligible for an extension of the expiration date stated on a Ce received not later than six (6) months prior to the expiration date on the Cer	rtificate, the renewal application and all applicable fees, including advance payments, must be rtificate.
This will ensure that the renewal process will be completed prior to the expi available dates more than nine (9) weeks prior to the expiration date of the	iration date indicated on the Certificate. Furthermore, the Certificate Holder must indicate Certificate when completing the Scheduling Information Form.
If ASME cannot schedule the review/survey on the dates included, then an e	extension will be granted.
Please see the Policy on Request for Extension under General Downloads fo	or more information.
I have reviewed and agreed to the above policies.	
T '	Next

- 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.

etails Finance					
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Certific	ations				
5					
ere are no additional s	ites or addresses related to this a	application (at this time)			
iite + Address					

- **10.** The Certificate Types form is displayed. Select the BPE certificate type.
- **11.** When done, click **Apply** to continue.

Certifica	te Types
ltem	Certification
	BPE - BPE Certification
0	BPE (Additional 1) BPE Certification
	RPE (Additional 2) - BPE Certification
	L

12. The BPE Certificate Type will be added to the Certifications tab. Click **Next** to continue.

Details	Finance					٥		
Poli	cies	Certifications	Stamps	Travel	Billing	Review		
					0			
🛛 Manage	/Select Certification	ons						
BPE BPE	←							
Scope	e Statement							
Sites								
There are	There are no additional sites or addresses related to this application (at this time)							
+ Site + /	Address							
					Previous Save	Next		

- **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.

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Program Type					
Upload Supplem	iental Form lick the "Download Suppleme	ntal Form" button, then s	ave it to your computer as	a pdf file. Next, open the f	form, fill it out, and save
	o your computer as a pdf file. npleted form via the "Upload S	upplemental Form" butte	on located below the "Dow	nload Supplemental Form	" button.
Download Supple	emental Form				
1 Upload Suppleme	ental Form (PDF)				T
				Previous	ve Next

- 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.

Details Finance					(
\bigcirc	\bigcirc	\bigcirc	\bigcirc		
Policies	Certifications	Stamps	Travel	Billing	Review
ravel Recomment	dation				
Location Name				Status	
ASME CA Connect Train	ning Company 🔫 🚃			Not Complete	
2 Park Avenue 💡 🗅					
New York, NY 10016					
United States					
Add New Location					
				Previou	s Next

- 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.

Indicates required fields	
ocation Details	Hotel 👁
livision Name	Name *
ASME CA Connect Training Company	
ddress Line 1	Address *
2 Park Avenue	
ddress Line 2	Country *
	Select Country
ountry	City *
United States	
tate	Zip/Postal Code
New York	
Sity	Phone *
New York	ext.
ip/Postal Code	
10016	Fax
	Miles from hotel to site *
rport	Emergency Contact
me*	Name *
y*	Phone *
1	+ ext.
les from airport to hotel *	
no non an port to noter	
ansportation *	
ansportation *	*

- **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.

Please review the addresses below.						
Hotel						
USPS Validated	You Entered					
2 Park Ave	2 Park Avenue 오 🗅					
New York, NY 10016	new york, NY 10013					
United States	United States					
☑ Use Valid USPS Address	Save Cancel					

- **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.

Details Finance					0
\bigcirc	\bigcirc	\bigcirc			
Policies	Certifications	Stamps	Travel	Billing	Review
Travel Recommend	dation				
Location Name				Status	
ASME CA Connect Train	ning Company			Complete	•
2 Park Avenue 오 🗅					
New York, NY 10016					
United States					
Add New Location					+
A				Previo	us Next
				Previo	INCAL

- **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.

\bigcirc	\bigcirc	\bigcirc	\bigcirc		
Policies	Certifications	Stamps	Travel	Billing	Review
Billing A retainer is billed to cover	cost associated with the revie	w/survey. Any left over rem	lttance will be refunded.		
Billing Address		Company B	anking Details ┥		
Use Plant Address Use N	Mailing Address	Please provide	the following information t	to allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
Address Line 2		Bank Account	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
Country		Billing Contact	Email	2	
Select Country		[
City		Account Numb	er / IBAN #	ad .	
Zip/Postal Code		SWIFT Code / B	IC	_	
zip/Fostal Code					
Contact/Attention		Bank Transit N	umber		
Contact/Attention		-			
		Tax ID Number			
Phone Number	ext.			1	
	ext.	Credit Card Pro	ocessing Form	4	

- **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.

Details Finance					
Policies	Certifications	Stamps	Travel	Billing	Review
-	e generally scheduled three			timeframe for scheduling your reeks (2.5 month) prior to your	-
arliest Date			Dates Unavailable Add	Dates	
The date selected should be a minimum three months from today's date		Start Date	End Date		
					Remove
Sister Locations					
				nnn	\sim

- **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.

livision Information	Hotel Information	Airport Information	Emergency Contact
Park Ave 💡 🗅	Marriott	JFK	Marc Anthony
lew York, NY 10016	475 Park Avenue 💡 🗅	Queens	Phone: +1 (212) 5911234
Inited States	New York, NY 10016	Miles From Airport To Hotel: 1	0
	United States		
	Miles from Hotel to Site: 10		
	Phone: +1 (212) 2021234		
Billing edit			

- **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.

	///////////////////////////////////////
Banking Details Bank Name:	Billing Address
ABA Routing Number:	
Account Number/IBAN #:	New York, NY 10016
Swift Code:	United States
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please upload your company manual	
Instructions: Upload your company manual via the upl	oad box below.
Please upload only your Company Manual. No other for	ms should be submitted via this upload box.
🔹 Upload Company Manual	
Please print, sign and upload the Agreeme	nt Form
Instructions: Please click the "Print Agreement" button	, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your co	mputer. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement For	rm. No other forms should be submitted via this upload box.
Download Agreement Form	
Upload Agreement Form	Ţ
	Previous Save

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.

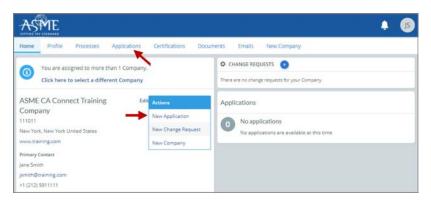
54. Click the blue gear icon and select the **Print Document** link.



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.

Home Profile Proces	Applications	Certifications Documents Emails New Con	npany
ASME CA Connect Tra	ining Company	Primary Contact Jane Smith	
New York, NY		jsmith@training.com	
www.training.com		+1 (212) 5911111	
0			
Search	Q	AZ ~	

- 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.

Note Profile Processes Applications Certifications Documents Enaits New Company ASME CA Connect Training Company 19111 Primary Contact Jare Smith puntheliferationg com +1 (21) 1911111 Primary Contact Jare Smith puntheliferationg com +1 (21) 1911111 Notivities Processes Activities Processes O No active Application Process No application processes have been started for this application Processes Image O No active Application Processes No application processes have been started for this application Processes Image O Certifications Stamps Image Travel Image Difficies Image Processes Image Output Image Output Image Output Image Output Image Processes Image Output Image Image	ASME .	
11011 gene Smith g	ome Profile Processes Applications Doc	cuments Emails New Company
 No activities scheduled No activities scheduled for this application at this time. No active Application Process to application processes have been started for this application. Details Finance Final Invoice For evidency: Surveys conducted by ASME, a final invoice will be rendered. It will contain the fees and expenses of the ASME Designee. If there is a balance due to ASME, certificates and stamps cannot be issued until the invoice is pail. Carcellation - Reviews/Surveys 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. • \$3,000 for cancellation within 2 months of review/survey dates. • \$3,000 for cancellation within 1 months of review/survey dates. • \$3,000 for cancellation within 1 months of review/survey dates. • \$3,000 for cancellation of the expiration date stated on a Certificate, the renewal application and all applicable fees, including advance payments, must be received not later than six (6) months prior to the expiration date on the Certificate. The survey that the renewal process will be completed prior to the expiration date indicated on the Certificate. Furthermore, the Certificate Heider must indicate autilable dates more than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling information Form. If ASEM cannot schedule the review/survey on the date included, then an extension will be granted.	1011 Jane Smith rev York, NY jsmith@training.com ww.training.com +1 (212) 5911111	
 There are no activities scheduled for this application at this time. In ance In ance Image: In ance Image: Image: Imag	ctivities	Processes
Policies Certifications Stamps Travel Billing Policies Final Invoice Exercifications Stamps Travel Billing Policies Final Invoice Final Invoice will be rendered. It will contain the fees and expenses of the ASME Designee. If there is a balance due to ASME, certificates and stamps cannot be issued until the invoice is paid. Cancellation - Reviews/Surveys scheduled by ASME 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. \$2,000 for cancellation after acceptance of review/survey dates. \$2,000 for cancellation within 2 months of review/survey dates. \$2,000 for cancellation within 1 months of review/survey dates. \$2,000 for cancellation within 1 months of review/survey dates. \$2,000 for cancellation within 1 months of review/survey dates. \$2,000 for cancellation within 1 months of review/survey dates. biotrace contract the expiration date stated on a Certificate, the renewal application and all applicable fees, including advance payments, must be received not later than six (6) months prior to the expiration date on the Certificate. This will ensure that the renewal process will be completed prior to the expiration date indicated on the Certificate. Furthermore, the Certificate Holder must indicate avalies are nore than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling information Form. fASME cannot schedule the	0	0
Final Invoice For reviews/Surveys conducted by ASME, a final invoice will be rendered. It will contain the fees and expenses of the ASME Designee. If there is a balance due to ASME, certificates and stamps cannot be issued until the invoice is paid. Cancellation - Reviews/Surveys scheduled by ASME Cancellation of review/survey dates scheduled by ASME is subject to a monetary penalty, deducted from the advanced deposit in the following schedule:	Vetails Finance	
certificates and stamps cannot be issued until the invoice is paid. Cancellation - Reviews/Surveys scheduled by ASME Cancellation of review/survey dates scheduled by ASME is subject to a monetary penalty, deducted from the advanced deposit in the following schedules: • \$2,000 for cancellation after acceptance of review/survey dates. • \$3,500 for cancellation within 2 months of review/survey dates. • \$3,500 for cancellation within 1 months of review/survey dates. • \$6,000 for cancellation within 1 months of review/survey dates. Extension Policy In order to be eligible for an extension of the expiration date stated on a Certificate, the renewal application and all applicable fees, including advance payments, must be received not later than six (6) months prior to the expiration date on the Certificate. This will ensure that the renewal process will be completed prior to the expiration date indicated on the Certificate. Furthermore, the Certificate Holder must indicate available dates more than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling Information Form. If ASME cannot schedule the review/survey on the dates included, then an extension will be granted. Please see the Policy on Request for Extension under General Downloads for more information.		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 months of review/survey dates. Extension Policy In order to be eligible for an extension of the expiration date stated on a Certificate, the renewal application and all applicable fees, including advance payments, must be received not later than six (6) months prior to the expiration date on the Certificate. This will ensure that the renewal process will be completed prior to the expiration date indicated on the Certificate, Furthermore, the Certificate Holder must indicate available dates more than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling Information Form. If ASME cannot schedule the review/survey on the dates included, then an extension will be granted. Please see the Policy on Request for Extension under General Downloads for more information.		tain the fees and expenses of the ASME Designee. If there is a balance due to $ASME_{r}$
 \$2,000 for cancellation after acceptance of review/survey dates. \$3,500 for cancellation within 2 months of review/survey dates. \$6,000 for cancellation within 1 months of review/survey dates. Extension Policy In order to be eligible for an extension of the expiration date stated on a Certificate, the renewal application and all applicable fees, including advance payments, must be received not later than six (6) months prior to the expiration date on the Certificate. This will ensure that the renewal process will be completed prior to the expiration date of the Certificate when completing the Scheduling Information Form. If ASME cannot schedule the review/survey on the dates included, then an extension will be granted. Please see the Policy on Request for Extension under General Downloads for more information.		
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Extension Policy In order to be eligible for an extension of the expiration date stated on a Certificate, the renewal application and all applicable fees, including advance payments, must be received not later than six (6) months prior to the expiration date on the Certificate. This will ensure that the renewal process will be completed prior to the expiration date indicated on the Certificate. Furthermore, the Certificate Holder must indicate available dates more than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling Information Form. If ASME cannot schedule the review/survey on the dates included, then an extension will be granted. Please see the Policy on Request for Extension under General Downloads for more information.		
In order to be eligible for an extension of the expiration date stated on a Certificate, the renewal application and all applicable fees, including advance payments, must be received not later than six (6) months prior to the expiration date on the Certificate. This will ensure that the renewal process will be completed prior to the expiration date indicated on the Certificate. Furthermore, the Certificate Holder must indicate available dates more than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling Information Form. If ASME cannot schedule the review/survey on the dates included, then an extension will be granted. Please see the Policy on Request for Extension under General Downloads for more information.	 \$6,000 for cancellation within 1 months of review/survey dates. 	
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This will ensure that the renewal process will be completed prior to the expiration date indicated on the Certificate. Furthermore, the Certificate Holder must indicate available dates more than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling Information Form. If ASME cannot schedule the review/survey on the dates included, then an extension will be granted. Please see the Policy on Request for Extension under General Downloads for more information.	order to be eligible for an extension of the expiration date stated on a Certificate	e, the renewal application and all applicable fees, including advance payments, must be
available dates more than nine (9) weeks prior to the expiration date of the Certificate when completing the Scheduling Information Form. If ASME cannot schedule the review/survey on the dates included, then an extension will be granted. Here see the Policy on Request for Extension under General Downloads for more information.	ceived not later than six (6) months prior to the expiration date on the Certificate.	6
If ASME cannot schedule the review/survey on the dates included, then an extension will be granted. Please see the Policy on Request for Extension under General Downloads for more information.	is will ensure that the renewal process will be completed prior to the expiration d	date indicated on the Certificate. Furthermore, the Certificate Holder must indicate
Please see the Policy on Request for Extension under General Downloads for more information.	railable dates more than nine (9) weeks prior to the expiration date of the Certifica	ate when completing the Scheduling Information Form.
	ASME cannot schedule the review/survey on the dates included, then an extension	on will be granted.
three reviewed and arrend to the show pallelar	ease see the Policy on Request for Extension under General Downloads for more	information.
- i nave reviewed and agreed to the addre policies.	I have reviewed and agreed to the above policies.	

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.

Details Finance					6
\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
Sites					
There are no additional s	ites or addresses related to this a	application (at this time)			
+ Site + Address					

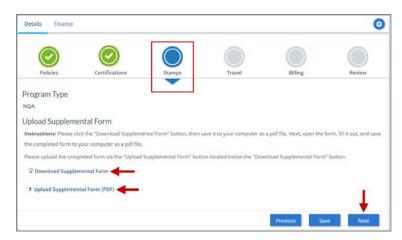
- The Certificate Types form is displayed. Select the NQA certificate type.
 When done, click **Apply** to continue.

Certifica	ite Types	ĸ
ltem	Certification	
	NQA - NQA-1 Quality Program Certificate	
	NQA (Additional 1) NQA 1 Quality Program Certificate —	
	NQA (Additional 2) - NQA-1 Quality Program Certificate -	
	Apply Close	

Details Finance					0
\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
R Manage/Select Certi	fications				
nqa 🚽 🔤					
Scope Statement					
Sites					
There are no addition	al sites or addresses related to	o this application (at this t	ime)		
+ Site - Address-					1
				Previous Sav	re Next

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.



- 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.

Travel Recommendation Detail 🔶	
* Indicates required fields	
Location Details	Hotel 💿
Division Name	Name *
ASME CA Connect Training Company	
Address Line 1	Address *
2 Park Avenue	
Address Line 2	Country *
	Select Country
Country	City *
United States	
State	Zip/Postal Code
New York	
City	Phone *
New York	ext.
Zip/Postal Code	
10016	Fax
	*
	Miles from hotel to site *
irport	Emergency Contact
ame *	Name *
ty *	Phone *
2	+ ext.
iles from airport to hotel *	
and the set of the set	
ansportation *	
Select Transportation	×.

- **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.

51

Please review the addresses below.	
Hotel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 오 🗅
New York, NY 10016	new york, NY 10013
United States	United States
Use Valid USPS Address	
-	Save Cancel

- **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.

Details Finance					(
\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
Fravel Recommen	dation				
Location Name				Status	
ASME CA Connect Train	ning Company			Complete	-0.0
2 Park Avenue 오 🗅					
New York, NY 10016					
United States					
Add New Location					+
A				Prev	ous Next
				Prev	IVEXT

- **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.

\bigcirc	\bigcirc	\bigcirc	\bigcirc		
Policies	Certifications	Stamps	Travel	Billing	Review
Billing A retainer is billed to cover	cost associated with the revie	w/survey. Any left over rem	lttance will be refunded.		
Billing Address		Company B	anking Details ┥		
Use Plant Address Use N	Mailing Address	Please provide	the following information t	to allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
Address Line 2		Bank Account	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
Country		Billing Contact	Email	2	
Select Country		[
City		Account Numb	er / IBAN #	ad .	
Zip/Postal Code		SWIFT Code / B	IC	_	
zip/Fostal Code					
Contact/Attention		Bank Transit N	umber		
Contact/Attention		-			
		Tax ID Number			
Phone Number	ext.			1	
	ext.	Credit Card Pro	ocessing Form	4	

- **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.

Details	Finance					0
Poli	cies	Certifications	Stamps	Travel	Billing	Review
ASME Review make sure t View More	he date ranges you	erally scheduled three t		cheduled a minimum 10 we	imeframe for scheduling your eks (2.5 month) prior to your	-
Earliest Dat	-		a fuana ta day ia data	Dates Unavailable Add [
	ected should be a	minimum three month	is from today's date	Start Date	End Date	
						Remove
Sister Locat						

- **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.

Division Information 1 Park Ave 오 🖸 New York, NY 10016 United States	Hotel Information Marriott 475 Park Avenue 오 🗅 New York, NY 10016	Airport Information JFK Queens Miles From Airport To Hotel: 1	Emergency Contact Marc Anthony Phone: +1 (212) 5911234
New York, NY 10016	475 Park Avenue የ 🗅	Queens	
			Phone: +1 (212) 5911234
Jnited States	New York, NY 10016	Miles From Airport To Hotel: 1	
		Miles Hom Airport To Hotel. 1	0
	United States		
	Miles from Hotel to Site: 10		
	Phone: +1 (212) 2021234		
Billing edit			
Credit Card Processing Form			

- **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.

//////////	
Banking Details	Billing Address
Bank Name:	1 Park Ave 🛛 🗅
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please upload your company manual	
Instructions: Upload your company manual via the upload	box below.
Please upload only your Company Manual. No other forms	should be submitted via this upload box.
🛨 Upload Company Manual 🚽	
Please print, sign and upload the Agreement	Form
Instructions: Please click the "Print Agreement" button, the	en save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your comp	uter. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement Form.	No other forms should be submitted via this upload box.
Download Agreement Form	
Upload Agreement Form	↓
	Previous Save

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.

			↓ I
	 Previous	Save	Submit

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.



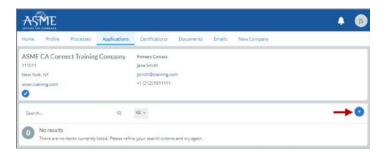
Nuclear Program (Corporate) – New Application

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.

Home Profile Processes Application	s Certifications Docu	iments Emails New Company
You are assigned to more than 1 Compa Click here to select a different Compar		CHANGE REQUESTS O There are no change requests for your Company
ASME CA Connect Training Company 111011 New York, New York United States www.staining.com Primary Contact Jane Smith Jane Smith	Edit Actions New Application New Change Request New Company	Applications O No applications No applications are available at this time

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.

ASME				. (15
Home Profile Processes Applications C	ertifications Documents	Emails New Con	npany	
111011 Jar New York, NY jsn	mary Contact e Smith lith@training.com (212) 5911111			
Activities	Proc	esses		
No activities scheduled There are no activities scheduled for this application	at this time.	No active Applica No application proce	tion Process isses have been started for t	this application.
Details Finance				0
Policies Certifications	Stamps	Travel	Billing	Review
Final Invoice				
For reviews/Surveys conducted by ASME, a final invoice will b		and expenses of the AS	ME Designee. If there is a b	alance due to ASME,
certificates and stamps cannot be issued until the invoice is p	aid.			
Cancellation - Reviews/Surveys scheduled I				
Cancellation of review/survey dates scheduled by ASME is su	bject to a monetary penalty, dedu	cted from the advanced	deposit in the following sch	edule:
\$2,000 for cancellation after acceptance of review/sur	vey dates.			
\$3,500 for cancellation within 2 months of review/sur				
 \$6,000 for cancellation within 1 months of review/sur 	vey dates.			
Extension Policy				
In order to be eligible for an extension of the expiration date	stated on a Certificate, the renew	al application and all ap	plicable fees, including adva	nce payments, must be
received not later than six (6) months prior to the expiration	date on the Certificate.			
This will ensure that the renewal process will be completed p	rior to the expiration date indicate	ad on the Certificate. Fu	thermore, the Certificate Ho	older must indicate
available dates more than nine (9) weeks prior to the expirat	on date of the Certificate when co	mpleting the Scheduling	Information Form.	
If ASME cannot schedule the review/survey on the dates inclu-	ided, then an extension will be gra	anted.		
Please see the Policy on Request for Extension under Genera	l Downloads for more information	τ.		
I have reviewed and agreed to the above policies.	4			
Ť	1			Next

- 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.

Details Finance					(
\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
Sites					
	the or addresses coloted to this :				
There are no additional s	ates or addresses related to this a	application (at this time)			
There are no additional s + Site + Address	ntes or addresses related to this a	pplication (at this time)			

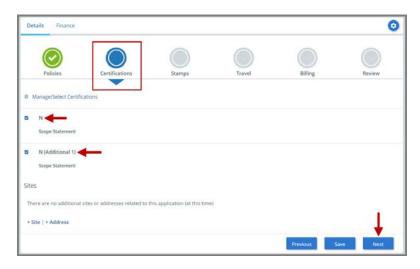
11. A list of Nuclear Certificate Types is displayed. Select the certificate type(s) you are applying for.

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.

ltem	Certification
0	N - Nuclear Components
	N (Additional 1) - Nuclear Components
	N (Additional 2) - Nuclear Components
	N (Quality Assurance Program) - Nuclear Components (Quality Assurance Program)
	N3 - Nuclear Components
•	N3 (Additional 1) - Nuclear Components
	N3 (Additional 2) - Nuclear Components
	N3 (Quality Assurance Program) - Nuclear Components (Quality Assurance Program)
0	NA - Nuclear installation and shop assembly

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.

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Policies	Certifications	Stamps	Travel	Billing	Review
Program Type					
Authorized Inspectio	on Agency				
Select AIA Organization		1	-		
Upload Supplementa	al Form				
Instructions: Please click th					
	ie . Download 200bieureisn		it to your computer as a po	The Next, open the form, I	If it out, and save the
	moutor as a odf file				
completed form to your con					
completed form to your con Please upload the complete	d form via the "Upload Sup	aplemental Form° button I	ocated below the "Downloa	d Supplemental Form* butte	и.
completed form to your con	d form via the "Upload Sup	plemental Form [®] button l	ocated below the "Download	d Supplemental Form" butte	an.
completed form to your con Please upload the complete Download Supplement	ed form via the "Upload Sup tal Form	plemental Form* button l	ocated below the "Download	i Supplemental Form' butte	an.
completed form to your con Please upload the complete	ed form via the "Upload Sup tal Form	oplemental Form [®] button l	ocated below the "Download	i Supplemental Form" butte	un.
completed form to your con Please upload the complete Download Supplement & Upload Supplemental F	ed form via the "Upload Sup tal Form	aplemental Form" button l	ocated below the "Download	: Supplemental Form" butte	on.
completed form to your con Please upload the complete To Download Supplement & Upload Supplemental F Stamp Selection	d form via the "Upload Sug tal Form 4				
completed form to your con Please upload the complete To Download Supplement & Upload Supplemental F Stamp Selection NEW APPLICANTS: Indicate	d form via the "Upload Sup tal Form Form (PDF)				
completed form to your con Plesse upload the complete To Download Supplemental 1 Upload Supplemental I Stamp Selection NEW APPLICANTS: Indicate assessed. Number of Marks	d form via the "Upload Sup tal Form Form (PDF)				
completed form to your con Plesse upload the complete To Download Supplemental 1 Upload Supplemental I Stamp Selection NEW APPLICANTS: Indicate assessed. Number of Marks 1/2 ² 0	d form via the "Upload Sup tal Form Form (PDF)				
completed form to your con Plesse upbad the complete Download Supplemental I Stamp Selection NEW APPLICANTS: Indicate assessed. Number of Marks 1/2 ² 0 3/4 ² 0	d form via the "Upload Sup tal Form Form IPDF) the number of ASME Sing requested.	e Certification Marks you			
completed form to your con Plesse upbad the complete Download Supplement I Upload Supplemental I Stamp Selection NEW APPLICANTS: Indicate assessed. Number of Marks 1/2 ² 0	d form via the "Upload Sup tal Form PDF) the number of ASME Sing requested.	e Certification Marks you			

- 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.

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Travel Recommen	dation				
Location Name				Status	
ASME CA Connect Trail 2 Park Avenue 9 🖻 New York, NY 10016 United States	ning Company			Not Complete	
Add New Location					
				Previo	us Next

- 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.

Travel Recommendation Detail	
* Indicates required fields	
Location Details	Hotel ©
Division Name	Name *
ASME CA Connect Training Company	
Address Line 1	Address *
2 Park Avenue	
Address Line 2	Country *
	Select Country
Country	City *
United States	
State	Zip/Postal Code
New York	
City	Phone *
New York	ext.
Zip/Postal Code	
10016	Fax
	Miles from hotel to site *
irport	Emergency Contact
ame *	Name *
ty *	Phone *
	+ ext.
iles from airport to hotel *	
nea nonn an par e sa datret =	
ansportation *	
Select Transportation	v
Select transportation	

- **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.

Please review the addresses below.	
Hotel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 오 📭
New York, NY 10016	new york, NY 10013
United States	United States
✓ Use Valid USPS Address	
T	
•	Save Cancel

- **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.

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Travel Recommend	dation				
Location Name				Status	
ASME CA Connect Train	ning Company			Complete	• 3
2 Park Avenue 오 🗅					
New York, NY 10016					
United States					
Add New Location					+
A				Previo	us Next

- **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.

Policies	Certifications	Stamps	Travel	Billing	Review
Foncies	Certifications	Stamps	Hever		Review
Billing					
A retainer is billed to cove	r cost associated with the revie	w/survey. Any left over rem	ittance will be refunded.		
Billing Address		Company B	anking Details ┥	-	
Use Plant Address Use	Mailing Address		the following information to	allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
Address Line 2		Bank Account	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
Country		Billing Contact	Email		
Select Country					
City		Account Numb	er / IBAN #		
Zip/Postal Code		SWIFT Code / B	IC		
cip/Fostal Code					
		Bank Transit N	umber		
Contact/Attention			unibet		
hone Number		Tax ID Number			
	ext.				
		Credit Card Pro	cessing Form		
			ard Processing Form		- I

- **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.

Details	Finance				0
Polic	ies Certifications	Stamps	Travel	Billing	Review
ASME Review make sure th View More	nfirm availability dates is/Survey are generally scheduled three ie date ranges you provide allow for yo		cheduled a minimum 10 w	eeks (2.5 month) prior to your c	-
Earliest Date		the from today's date	Dates Unavailable Add		
The date selected should be a minimum three months from today's date		Start Date	End Date		
					Remove
Sister Locatio	ons		//		

- **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.

Travel edit 🗲 🗕			
Division Information	Hotel Information	Airport Information	Emergency Contact
1 Park Ave 💡 🗅	Marriott	JFK	Marc Anthony
New York, NY 10016	475 Park Avenue 🎙 🗅	Queens	Phone: +1 (212) 5911234
United States	New York, NY 10016	Miles From Airport To Hotel: 1	0
	United States		
	Miles from Hotel to Site: 10		
	Phone: +1 (212) 2021234		
Billing edit 🚽 🗕			
Credit Card Processing I	orm		

- **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.

11111111	/ / / / / / / / / / / / / / / / / / / /
Banking Details	Billing Address
Bank Name:	1 Park Ave 🗣 🗅
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please print, sign and upload the Agreemen	t Form
Instructions: Please click the "Print Agreement" button, t	hen save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your com	nputer. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement Form	n. No other forms should be submitted via this upload box.
Download Agreement Form	
Upload Agreement Form	Ţ
	Previous Save

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 Decument link.
- 56. Click the blue gear icon and select the **Print Document** link.

Details Finance	Print Document
Application Details Application ID: FAB-130263	1

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.

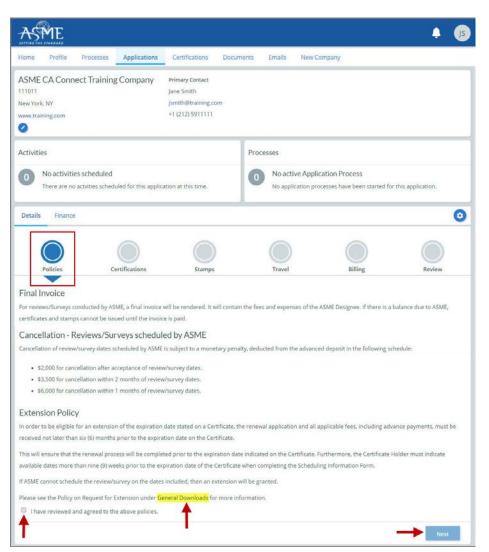
ASME		€ (8
Home Profile Processes Applications	Certifications Docum	eents Emails New Company
Company 111011 New York, New York United States	Actions New Application New Change Request New Company	CHANGE REQUESTS There are no change requests for your Company Applications No applications No applications are available at this time

3. On the right side of your Applications page, click the **blue circle (+) icon** to create a new application.

ASME							<u>ب</u>
Home Profile	Processes	Applications	Certifications	Documents	Emails	New Company	
ASME CA Co 111011 New York, NY www.training.com		ng Company	Primary Contact Jane Smith jsmith@training.4 +1 (212) 5911111				
Search		Q	AŽ ~				→ 0
No resu There are		y listed. Please refir	ne your search criter	ia and try again.			

- 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.
- 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.

Details Finance						
Policies	Certifications	Stamps	Travel	Billing	Review	
Manage/Select Certific						
Sites						
There are no additional s	ites or addresses related to this a	application (at this time)				
+ Site + Address						
				Previous	Save Next	

67

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.

Certi	icate Types 🗶						
lterr	Certification						
	N - Nuclear Components						
	N (Additional 1) - Nuclear Components						
	N (Additional 2) - Nuclear Components						
	N (Quality Assurance Program) - Nuclear Components (Quality Assurance Program)						
	N3 - Nuclear Components						
	N3 (Additional 1) - Nuclear Components						
	N3 (Additional 2) - Nuclear Components						
	N3 (Quality Assurance Program) - Nuclear Components (Quality Assurance Program)						
	NA - Nuclear installation and shop assembly						
T	Apply Close						

13. Select the Site link on the Certifications tab.

Details Finance					
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Cert	ifications				
N					
Scope Statement					
ites					
There are no addition	al sites or addresses related t	o this application (at this t	time)		
+ Site + Address					
-					

14. Select the **New Site** link to add the details required for the site certificate.

Find Sites			,
SEARCH/RESULTS		SELECTED SITES Clear	
Search	Q		
+ New Site			

- **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.

Find Sites		:
SEARCH/RESULTS		SELECTED SITES Clear
Search ASME CA Co Company - / 475 Broadw New York, N United State	ay ♥ ₽ Y 10013	
+ New Site		Apply

- **17.** Enter the **Company** and **Address location** details for the **site certificate** in the designated fields.
- **18.** When done, click **Save** to continue.

Company Na	me	Status		
-		Active	• 🔶	
Website		Туре	Primary Pho	ne
-		AIA	- T	Ph ext. Extension
Address Lin		Show 3rd Line		
City	Select State	Postal Code		
•	+	4		1

69

- **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.

Find Sites			×
SEARCH/RESULTS		SELECTED SITES Clear	
Search	Q	ASME CA Connect Training Site 2 Company - Active	
+ New Site		Аррі	/

- **20.** You will be redirected back to the Certifications tab where the Company record details are added.
- 21. Click the Manage/Select Certifications link.

Certifications	Stamps	Travel	Billing	Review
Site		Manage/Select C	ertifications	
	ite	ite	ite ManagerSelect C	ite ManagerSelect Certifications

22. Select the Certificate Type, then click **Apply** to continue.

Certific	ate Types		×
ltem	Certification		
	N - Nuclear Components		
1			

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

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Certi	fications				
N Scope Statement Sites					
Site					
ASME CA Connect 1 475 Broadway 9 Q New York, NY 1001 United States	6		 N Manage/Select Cer 	tifications	
Address					
+ Site + Address					1
				Previous Sav	ve Next

- 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.

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Policies	Certifications	Stamps	Travel	Billing	Review
Program Type					
Authorized Inspectio	on Agency				
Select AIA Organization		1	-		
Upload Supplementa	al Form				
Instructions: Please click th					
	ie . Download 200bieureisn		it to your computer as a po	The Next, open the form, I	If it out, and save the
	moutor as a odf file				
completed form to your con					
completed form to your con Please upload the complete	d form via the "Upload Sup	aplemental Form° button I	ocated below the "Downloa	d Supplemental Form* butte	и.
completed form to your con	d form via the "Upload Sup	plemental Form® button l	ocated below the "Download	d Supplemental Form" butte	an.
completed form to your con Please upload the complete Download Supplement	ed form via the "Upload Sup tal Form	plemental Form* button l	ocated below the "Download	i Supplemental Form' butte	an.
completed form to your con Please upload the complete	ed form via the "Upload Sup tal Form	oplemental Form [®] button l	ocated below the "Download	i Supplemental Form" butte	un.
completed form to your con Please upload the complete Download Supplement & Upload Supplemental F	ed form via the "Upload Sup tal Form	aplemental Form" button l	ocated below the "Download	: Supplemental Form" butte	on.
completed form to your con Please upload the complete To Download Supplement & Upload Supplemental F Stamp Selection	d form via the "Upload Sug tal Form I The Sug Form (PDF)				
completed form to your con Please upload the complete To Download Supplement & Upload Supplemental F Stamp Selection NEW APPLICANTS: Indicate	d form via the "Upload Sup tal Form Form (PDF)				
completed form to your con Plesse upload the complete To Download Supplemental 1 Upload Supplemental I Stamp Selection NEW APPLICANTS: Indicate assessed. Number of Marks	d form via the "Upload Sup tal Form Form (PDF)				
completed form to your con Plesse upload the complete To Download Supplemental 1 Upload Supplemental I Stamp Selection NEW APPLICANTS: Indicate assessed. Number of Marks 1/2 ² 0	d form via the "Upload Sup tal Form Form (PDF)				
completed form to your con Plesse upbad the complete Download Supplemental I Stamp Selection NEW APPLICANTS: Indicate assessed. Number of Marks 1/2 ² 0 3/4 ² 0	d form via the "Upload Sup tal Form Form IPDF) the number of ASME Sing requested.	e Certification Marks you			
completed form to your con Plesse upbad the complete Download Supplement I Upload Supplemental I Stamp Selection NEW APPLICANTS: Indicate assessed. Number of Marks 1/2 ² 0	d form via the "Upload Sup tal Form PDF) the number of ASME Sing requested.	e Certification Marks you			

- **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.

Details Finance					G
Policies	Certifications	Stamps	Travel	Billing	Review
ravel Recommen	dation				
Location Name				Status	
ASME CA Connect Trais 2 Park Avenue 🗣 🖻 New York, NY 10016 United States	ning Company			Not Complete	
Add New Location					
				Previo	us Next

- 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.

Travel Recommendation Detail	
* Indicates required fields	
Location Details	Hotel ©
Division Name	Name *
ASME CA Connect Training Company	
Address Line 1	Address *
2 Park Avenue	
Address Line 2	Country *
	Select Country
Country	City *
United States	
State	Zip/Postal Code
New York	
City	Phone *
New York	ext.
Zip/Postal Code	
10016	Fax
	Miles from hotel to site *
irport	Emergency Contact
ame *	Name *
ity *	Phone *
	+ ext.
liles from airport to hotel *	
ransportation *	
Select Transportation	*

- **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.

otel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 오 🗅
New York, NY 10016	new york, NY 10013
United States	United States
Use Valid USPS Address	
	

- **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.

Details Finance				0	
Policies	Certifications	Stamps	Travel	Billing	Review
Travel Recommend	dation				
Location Name				Status	
ASME CA Connect Train	ning Company			Complete	• 3
2 Park Avenue 오 🗅					
New York, NY 10016					
United States					
Add New Location					+
A				Previo	us Next

- **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.

\bigcirc	\bigcirc	\bigcirc	\bigcirc		
Policies	Certifications	Stamps	Travel	Billing	Review
Billing					
-	r cost associated with the revie	w/survey. Any left over rem	Ittance will be refunded.		
Billing Address		Company B	anking Details ┥		
Use Plant Address Use	Mailing Address	Please provide	the following information to	allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
Address Line 2		Bank Account I	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
Country		Billing Contact	Email		
Select Country					
lity		Account Numb	er / IBAN #		
Cip/Postal Code		SWIFT Code / B	IC		
Contact/Attention		Bank Transit N	umber		
hone Number		Tax ID Number			
	ext.	_			
		Credit Card Pro	cessing Form		
			ard Processing Form 🗲	_	

- **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.

Details	Finance				0
Polic	ies Certifications	Stamps	Travel	Billing	Review
ASME Review	nfirm availability dates rs/Survey are generally scheduled three to re date ranges you provide allow for your				-
Earliest Date	e ected should be a minimum three month	s from today's date	Dates Unavailable Add Start Date	Dates End Date	
					Remove
Sister Locati	ons				

- **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.

Travel edit 🗲 🗕			
Division Information	Hotel Information	Airport Information	Emergency Contact
Park Ave 💡 🗅	Marriott	JFK	Marc Anthony
Jew York, NY 10016	475 Park Avenue 💡 🗅	Queens	Phone: +1 (212) 5911234
Jnited States	New York, NY 10016	Miles From Airport To Hotel: 1	0
	United States		
	Miles from Hotel to Site: 10		
	Phone: +1 (212) 2021234		
Billing edit			
Credit Card Processing F			

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.

Banking Details	Billing Address
Bank Name:	1 Park Ave 🗣 🗅
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	once second
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please print, sign and upload the Agreement I	Form
Instructions: Please click the "Print Agreement" button, the	en save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your comp	uter. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement Form.	No other forms should be submitted via this upload box.
Download Agreement Form	
Upload Agreement Form	1
	Previous Save

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.

				Ļ
		Previous	Save	Submit

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.

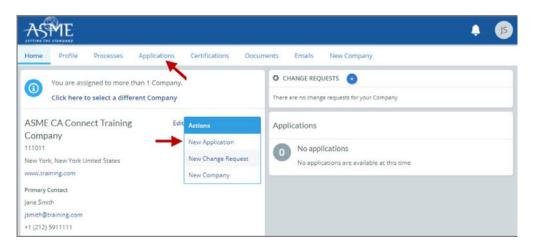
66. Click the blue gear icon and select the **Print Document** link.



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.

ASME		↓ (15)
Home Profile Processes Applications	Certifications Documents Emails New Company	
ASME CA Connect Training Company 111011 New York, NY www.training.com	Primary Contact Jane Smith jsmith@training.com +1 (212) 5911111	
Search Q	AZ ~	->0
No results There are no items currently listed. Please refin	ie your search criteria and try again.	

- 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.

ASME				4 1
Home Profile Processes Applications	Certifications Docum	ients Emails New C	ompany	
ASME CA Connect Training Company 111011 New York, NY www.training.com	Primary Contact Jane Smith jsmith@training.com +1 (212) 5911111			
Activities		Processes		
No activities scheduled There are no activities scheduled for this applica	tion at this time.	No active Applie No application pro	cation Process icesses have been started for	this application.
Details Finance		·		0
Policies Certifications	Stamps	Travel	Billing	Review
Final Invoice				
For reviews/Surveys conducted by ASME, a final invoice v	vill be rendered. It will contain	the fees and expenses of the	ASME Designee. If there is a l	palance due to ASME,
certificates and stamps cannot be issued until the invoice	e is paid.			
Cancellation - Reviews/Surveys schedule	ed by ASME			
Cancellation of review/survey dates scheduled by ASME i	s subject to a monetary pena	Ity, deducted from the advance	ed deposit in the following scl	hedule:
\$2,000 for cancellation after acceptance of review	/survey dates.			
\$3,500 for cancellation within 2 months of review				
 \$6,000 for cancellation within 1 months of review 	/survey dates.			
Extension Policy				
In order to be eligible for an extension of the expiration of	date stated on a Certificate, th	e renewal application and all a	pplicable fees, including adv	ance payments, must be
received not later than six (6) months prior to the expirat	ion date on the Certificate.			
This will ensure that the renewal process will be complet	ed prior to the expiration dat	e indicated on the Certificate. F	urthermore, the Certificate H	iolder must indicate
available dates more than nine (9) weeks prior to the exp	viration date of the Certificate	when completing the Schedul	ng Information Form.	
If ASME cannot schedule the review/survey on the dates	included, then an extension v	vill be granted.		
Please see the Policy on Request for Extension under Ge	neral Downloads for more inf	ormation.		
I have reviewed and agreed to the above policies.	4			
1				Next

- 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.

	-
Policies Certifications Stamps Travel Billing Revi	

- **12.** The **Certificate Types** form is displayed.
- 13. Select PRD Pressure Relief Device, click Apply to continue.

Certifica	ite Types 🗙
ltem	Certification
	PRD - Pressure Relief Device
1	
-	
	Apply Close

- 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.

Scopes	×
ltem	Certification
	Nitrogen - Nitrogen
	Steam
	Air
	Water
	Liquids - Liquids
	Natural Gas - Natural Gas
	Apply Close

- **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.

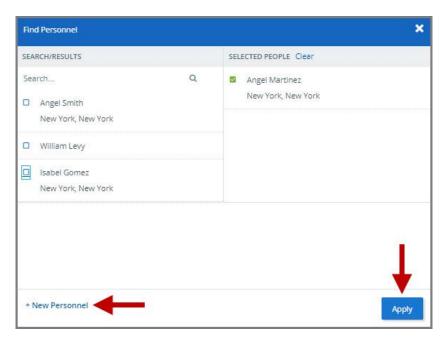
Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
B Manage/Select Certificatio	ns				
PRD Scope Statement Choose	e Scopes				
Personnel					
There are no additional pers	onnel related to this application (at t	his time)			
+ Personnel					
				Previous	Save Next

- **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.

First Name	Last Name	
First Name	Last Name	
Primary Email		
Email Address		
Credentials	Master Customer ID	
-		
Primary Phone	er ext. Extension	
		

- 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.



82

23. Select the Manage/Select Certifications link to connect the PRD Certificate Type to each person.

Detail	Is Finance					0
	Policies	Certifications	Stamps	Travel	Billing	Review
🗖 Mar	nage/Select Certifications	5				
5	PRD Scope Statement Choose ! Steam NNEI	Scopes			₽ ₽	
	Person					
2	Isabel Gomez 오 다 New York, NY United States			Manage/Select Certificat	tions	
	Angel Martinez 오 만 New York, NY United States			Bi Manage/Select Certificat	tions	
+ Pers	sonnel					
					Previous	Save Next

- 24. Select the PRD-Pressure Relief Device certificate type option.
- **25.** When done, click **Apply** to continue.

Certifica	ite Types 🗙
ltem	Certification
	PRD - Pressure Relief Device
1	
	Apply Close

Po	Jicies Certif	ications	Stamps	Travel	Billing	Review
Manage/S	elect Certifications					
PRD Scope S Steam	tatement Choose Scopes				\searrow	
Perso	n					
♀ ₽ New	l Gomez York, NY d States			PRD Manage/Select Certifications		
오 다 New	l Martinez York, NY d States			PRD Manage/Select Certifications		

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

- 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.

Policies	Certifications	Stamps	Travel	Billing	Review
ogram Type					1

- 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.

Policies	Certifications	Stamps	Travel	Billing	Review
ravel Recommen	dation				
Location Name				Status	
ASME CA Connect Trais 2 Park Avenue 🗣 🖻 New York, NY 10016 United States	ning Company			Not Complete	
Add New Location					

- 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.

Travel Recommendation Detail ┥ —	
* Indicates required fields	
Location Details	Hotel ©
Division Name	Name *
ASME CA Connect Training Company	
Address Line 1	Address *
2 Park Avenue	
Address Line 2	Country *
	Select Country
Country	City *
United States	
State	Zip/Postal Code
New York	
City	Phone *
New York	ext.
Zip/Postal Code	
10016	Fax
	Miles from hotel to site *
sirport	Emergency Contact
lame *	Name *
ity *	Phone *
	+ ext.
tiles from airport to hotel *	
ransportation *	
Select Transportation	*

- **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.

otel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 오 🗅
New York, NY 10016	new york, NY 10013
United States	United States
Use Valid USPS Address	
A	

- **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.

Details Finance					0
\bigcirc	\bigcirc				
Policies	Certifications	Stamps	Travel	Billing	Review
ravel Recommen	dation				
Location Name				Status	
ASME CA Connect Train	ning Company			Complete	•
2 Park Avenue 오 🗅					
New York, NY 10016					
United States					
Add New Location					+
A				Previo	us Next
				Previo	INCAL

- **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.

	0				0
\bigcirc	\bigcirc	\bigcirc	\bigcirc		
Policies	Certifications	Stamps	Travel	Billing	Review
Billing					
-	r cost associated with the revie	w/survey. Any left over rem	ittance will be refunded.		
Billing Address		Company B	anking Details ┥	-	
Use Plant Address Use	Mailing Address	Please provide	the following information to	allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
Address Line 2		Bank Account I	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
ountry		Billing Contact	Email		
Select Country					
City		Account Numb	er / IBAN #		
Cip/Postal Code		SWIFT Code / B	IC		
Contact/Attention		Bank Transit N	umber		
hone Number		Tax ID Number			
·	ext.				
		Credit Card Pro	cessing Form		
			ard Processing Form 🗲	_	

- **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.

Details Finance					0
	\bigcirc				
Policies	Certifications	Stamps	Travel	Billing	Review
-	e generally scheduled three t			timeframe for scheduling your eeks (2.5 month) prior to your Dates	-
The date selected should	d be a minimum three month	s from today's date	Start Date	End Date	
					Remove
Sister Locations					

- **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.

Travel edit 🗲 🗕			
Division Information	Hotel Information	Airport Information	Emergency Contact
Park Ave 🗣 🗅	Marriott	JFK	Marc Anthony
New York, NY 10016	475 Park Avenue 오 🗅	Queens	Phone: +1 (212) 5911234
Jnited States	New York, NY 10016	Miles From Airport To Hotel: 1	10
	United States		
	Miles from Hotel to Site: 10		
	Phone: +1 (212) 2021234		
Billing edit			
Credit Card Processing I			

- **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.

	///////////////////////////////////////
Banking Details Bank Name:	Billing Address
ABA Routing Number:	
Account Number/IBAN #:	New York, NY 10016
Swift Code:	United States
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please upload your company manual	
Instructions: Upload your company manual via the upl	oad box below.
Please upload only your Company Manual. No other for	ms should be submitted via this upload box.
🔹 Upload Company Manual	
Please print, sign and upload the Agreeme	nt Form
Instructions: Please click the "Print Agreement" button	, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your co	mputer. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement For	rm. No other forms should be submitted via this upload box.
Download Agreement Form	
Upload Agreement Form	Ţ
	Previous Save

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.

			↓ I
	Previous	Save	Submit

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.

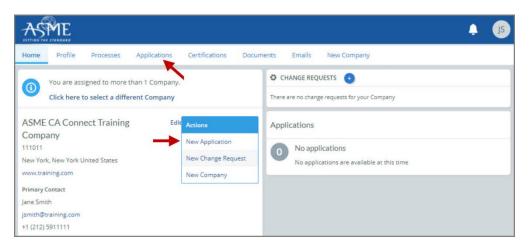
Details Finance	Print Document
Application Details	_
Application ID: FAB-130263	,

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.

ASME	€IC (15)
Home Profile Processes Applications	Certifications Documents Emails New Company
ASME CA Connect Training Company 111011 New York, NY www.training.com	Primary Contact Jane Smith jsmith@training.com +1 (212) 5911111
Search Q No results There are no items currently listed. Please refin	AZ ~

- 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.

- 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.

ASME						4	JS
Home Profile Processes Application	ns Certifications Docu	ments	Emails	New Company			
ASME CA Connect Training Compan 111011 New York, NY www.training.com	y Primary Contact Jane Smith jsmith⊜training.com +1 (212) 5911111						
Activities		Proces	ses				
No activities scheduled There are no activities scheduled for this a	pplication at this time.	0		ve Application P ation processes h	rocess ave been started fo	or this application.	
Details Finance							0
Policies Certifications	Stamps		Travel		Billing	Review	
Final Invoice For reviews/Surveys conducted by ASME, a final inv certificates and stamps cannot be issued until the i		in the fees a	nd expens	es of the ASME De	signee. If there is a	balance due to ASME,	
Cancellation - Reviews/Surveys sche							
Cancellation of review/survey dates scheduled by A \$2,000 for cancellation after acceptance of \$3,500 for cancellation within 2 months of r \$6,000 for cancellation within 1 months of r	eview/survey dates. eview/survey dates.	alty, deducti	ed from th	e advanced deposi	It in the following s	chedule:	
Extension Policy							
In order to be eligible for an extension of the expir- received not later than six (6) months prior to the e		the renewal	applicatior	n and all applicable	e fees, including adv	vance payments, must	be
This will ensure that the renewal process will be co available dates more than nine (9) weeks prior to th						Holder must indicate	
If ASME cannot schedule the review/survey on the				action of the second	nauvn Form.		
Please see the Policy on Request for Extension und							
I have reviewed and agreed to the above polic		and the second					
1						Next	

- 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.

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Certifica	ations				
Sites					
There are no additional si	tes or addresses related to this a	application (at this time)			
+ Site + Address					
				Previous	Save Next

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.

	Certificat	te Types	×
	ltem	Certification	
-		MO - Material Organizations	
	-	MO (Additional 1) Material Organizations	
	-	MO (Additional 2) Material Organizations	
		1	
		Apply Clos	e

13. The Certificate Type(s) you selected will be added to the Certifications tab. Click **Next** to continue.

Details Finance					0
\bigcirc	\bigcirc				
Policies	Certifications	Stamps	Travel	Billing	Review
Sites					
There are no additiona	l sites or addresses related to t	his application (at this time	:)		
+ Site - Address -					
T				Previous S	ave Next

- 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.

Details Finance	3				0
\bigcirc	\bigcirc				
Policies	Certifications	Stamps	Travel	Billing	Review
Program Type					
QSC					
Upload Supplem	ental Form				
Instructions: Please of	click the "Download Suppleme	ntal Form" button, then s	save it to your computer as	a pdf file. Next, open the f	form, fill it out, and save
the completed form to	o your computer as a pdf file.				
Please upload the con	npleted form via the "Upload S	supplemental Form" butt	on located below the "Dow	nload Supplemental Form	" button.
Download Supple	emental Form 🔶				
* Upload Suppleme	ental Form (PDF)				1.1
					1
				Previous San	ve Next

- 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.

Policies	Certifications	Stamps	Travel	Billing	Review
ravel Recommend	dation				
Location Name				Status	
ASME CA Connect Train 2 Park Avenue 🗣 🗅 New York, NY 10016 United States	ing Company			Not Complete	
Add New Location					

- 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.

Travel Recommendation Detail ┥ —	
* Indicates required fields	
Location Details	Hotel ©
Division Name	Name *
ASME CA Connect Training Company	
Address Line 1	Address *
2 Park Avenue	
Address Line 2	Country *
	Select Country
Country	City *
United States	
State	Zip/Postal Code
New York	
City	Phone *
New York	ext.
Zip/Postal Code	
10016	Fax
	Miles from hotel to site *
sirport	Emergency Contact
lame *	Name *
ity *	Phone *
	+ ext.
tiles from airport to hotel *	
ransportation *	
Select Transportation	*

- **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.

otel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 오 🗅
New York, NY 10016	new york, NY 10013
United States	United States
🖉 Use Valid USPS Address	
A	
†	

- **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.

Details Finance	etails Finance				0	
\bigcirc						
Policies	Certifications	Stamps	Travel	Billing	Review	
Fravel Recomment	dation					
Location Name				Status		
ASME CA Connect Train	ning Company			Complete 🗲		
2 Park Avenue 오 🗅						
New York, NY 10016						
United States						
Add New Location					+	
A				Previo	ous Next	
				FIGUR	iner iner	

- **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.

Policies	Certifications	Stamps	Travel	Billing	Review
Billing					
	cost associated with the revie	w/survey. Any left over rem	ittance will be refunded.		
Billing Address		Company B	anking Details 🚽	-	
Use Plant Address Use N	Aailing Address		the following information to	allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
Address Line 2		Bank Account	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
Country		Billing Contact	Email		
Select Country	*				
City		Account Numb	er / IBAN #		
Zip/Postal Code		SWIFT Code / B	IC		
Contact/Attention		Bank Transit N	umber		
hone Number		Tax ID Number			
	ext.				
		Credit Card Pre	ocessing Form		
		Credit C	ard Processing Form 🔸	_	

- **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.

Details	Finance				0
Policie	es Certifications	Stamps	Travel	Billing	Review
ASME Reviews make sure the View More	firm availability dates /Survey are generally scheduled three t date ranges you provide allow for your		cheduled a minimum 10 we	eeks (2.5 month) prior to your o	-
Earliest Date	ted should be a minimum three month	s from today's date	Dates Unavailable Add	Dates End Date	
-					Remove
Sister Location					

- **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.

etel Information arriott 5 Park Avenue 오 🗅 w York, NY 10016	Airport Information JFK Queens	Emergency Contact Marc Anthony Phone: +1 (212) 5911234
5 Park Avenue 오 🗅	Queens	-
		Phone: +1 (212) 5911234
w York, NY 10016		
	Miles From Airport To Hotel: 1	0
ited States		
les from Hotel to Site: 10		
one: +1 (212) 2021234		

- **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.

//////////	
Banking Details	Billing Address
Bank Name:	1 Park Ave 🛛 🗅
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please upload your company manual	
Instructions: Upload your company manual via the upload	box below.
Please upload only your Company Manual. No other forms	should be submitted via this upload box.
🛨 Upload Company Manual 🚽	
Please print, sign and upload the Agreement	Form
Instructions: Please click the "Print Agreement" button, the	en save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your comp	uter. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement Form.	No other forms should be submitted via this upload box.
Download Agreement Form	
Upload Agreement Form	↓
	Previous Save

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.

			Ļ
	Previous	Save	Submit

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.

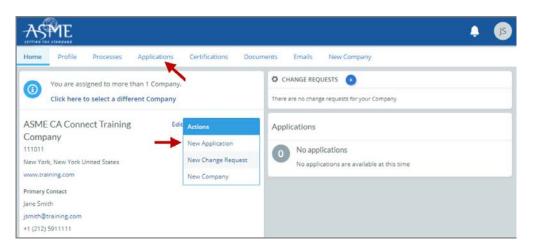
55. Click the blue gear icon and select the **Print Document** link.



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.

Home	Profile	Processes	Applications	Certifications	Documents	Emails	New Company	
111011 New York		ect Training	g Company	Primary Contact Jane Smith jsmith@training.c +1 (212) 5911111				
Search			Q	AZ ~				->0

101

- 4. The first application tab is the **Policies tab**. Review all information displayed on he tab.
- 5. Scroll down the page to the Extension Policy section.
- 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.

ASME	e (1
Home Profile Processes Applications De	ocuments Emails New Company
ASME CA Connect Training Company Primary Contact 111011 Jane Smith New York, NY jsmith@training.com www.training.com +1 (212) 5911111	
Activities	Processes
0 No activities scheduled There are no activities scheduled for this application at this time.	No active Application Process No application processes have been started for this application.
Details Finance	٥
Policies Certifications Stamps	Travel Billing Review
Final Invoice For reviews/Surveys conducted by ASME, a final invoice will be rendered. It will co certificates and stamps cannot be issued until the invoice is paid. Cancellation - Reviews/Surveys scheduled by ASME	ontain the fees and expenses of the ASME Designee. If there is a balance due to ASME,
Cancellation of review/survey dates scheduled by ASME is subject to a monetary p	penalty, deducted from the advanced deposit in the following schedule:
 \$2,000 for cancellation after acceptance of review/survey dates. \$3,500 for cancellation within 2 months of review/survey dates. \$6,000 for cancellation within 1 months of review/survey dates. 	
Extension Policy	
In order to be eligible for an extension of the expiration date stated on a Certifica received not later than six (6) months prior to the expiration date on the Certificat	ate, the renewal application and all applicable fees, including advance payments, must be ate.
	n date indicated on the Certificate. Furthermore, the Certificate Holder must indicate
available dates more than nine (9) weeks prior to the expiration date of the Certif	
If ASME cannot schedule the review/survey on the dates included, then an extens	
Please see the Policy on Request for Extension under General Downloads for mor	re information.
I have reviewed and agreed to the above policies.	
T	Next

- 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.

Details Finance					0
\bigcirc	\bigcirc				
Policies	Certifications	Stamps	Travel	Billing	Review
 Manage/Select Certifica Sites 	tions				
There are no additional si	ites or addresses related to this a	application (at this time)			
+ Site + Address					
				Previous	Save Next

- 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.

Item Certification O MO - Material Organizations O MO (Additional 1) - Material Organizations - O MO (Additional 2) - Material Organizations -	MO - Material Organizations MO (Additional 1) Material Organizations -	Certifica	te Types
MO (Additional 1) Material Organizations -	MO (Additional 1) Material Organizations -	ltem	Certification
			MO - Material Organizations
HO (Additional 2) Material Organizations -	HO (Additional 2) Material Organizations -	-	MO (Additional 1) Material Organizations –
	Ţ		- MO (Additional 2) - Material Organizations -
	T		

13. Select the **Site** link on the Certifications tab.

Details Finance					C
\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
Scope Statement Sites					
	l sites or addresses related to t	his application (at this time	1)		
There are no additiona					
+ Site					

14. Select the **New Site** link to add the details required for the site certificate.

Find Sites			×
SEARCH/RESULTS		SELECTED SITES Clear	
Search	Q		
+ New Site			Apply

- **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.

Find	l Sites		ĸ
SEAF	RCH/RESULTS		SELECTED SITES Clear
Sea	rch	Q	
Ť	ASME CA Connect Training Site Company - Active 475 Broadway 오 🗅 New York, NY 10013 United States		
+ N	lew Site		Apply

- **17.** Enter the **Company** and **Address location** details for the **site certificate** in the designated fields.
- **18.** When done, click **Save** to continue.

Company Na	me	Status	
-		Active	*
Website		Туре	Primary Phone
-		AIA	* 1 Ph ext. Extension
Address Lin		-	
Address Lin		Show 3rd Line Postal Code	
	A		
	-	T	

- **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.

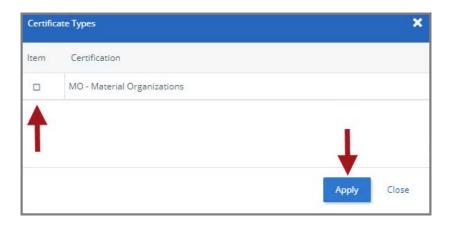
SELECTED SITES Clear
ASME CA Connect Training Company Company - Active 2 Park Avenue ♀ ⊡ New York, NY 10016 United States
Apply

- **20.** You will be redirected back to the Certifications tab where the Company record details are added.
- 21. Click the Manage/Select Certifications link.

Details Finance				0
Policies Certifications	Stampt	() tured	() Billing	() Review
8 Manage/Select Certifications	10.1			
MO foope Galaxies				
Site				
8 ADME CA Convert Training Company 2 Task Annual ♥ S Ineur tool, 107 10216 United States		* Manapertirient (artifications.	
Address				
+Site +Address				
			Previous Se	we first

105

22. Select the Certificate Type, then click **Apply** to continue.



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

Details Finance					0
\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Certificat	tions				
S MO Scope Statement					
lites					
Site					
ASME CA Connect Tra	aining Site		в мо	6	
New York, NY 10013 United States			III Manage/Select Cert	ifications	
Address					1
+ Site + Address					+
				Previous	Save Next

- 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.

Certifications	Stamps	Travel	Billing	Review
al Form				
he "Download Suppleme	ntal Form" button, then s	ave it to your computer as	a pdf file. Next, open the fi	orm, fill it out, and say
r computer as a pdf file.				
ed form via the "Upload !	Supplemental Form" butt	on located below the "Dow	nload Supplemental Form'	button.
ntal Form				
Form (PDF)				
				100
1	al Form he "Download Suppleme r computer as a pdf file. ed form via the "Upload ! htal Form	al Form he "Download Supplemental Form" button, then s r computer as a pdf file. ed form via the "Upload Supplemental Form" butto tal Form	al Form he "Download Supplemental Form" button, then save it to your computer as r computer as a pdf file. ed form via the "Upload Supplemental Form" button located below the "Dow ttal Form	al Form he "Download Supplemental Form" button, then save it to your computer as a pdf file. Next, open the f r computer as a pdf file. ed form via the "Upload Supplemental Form" button located below the "Download Supplemental Form" tial Form

- **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.

Details Finance					C
Policies	Certifications	Stamps	Travel	Billing	Review
Travel Recommend	dation				
Location Name				Status	
2 Park Avenue 🖻 New York, NY 10016	ning Company			Not Complete	
United States Add New Location					
				Previo	us Next

- **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.

Travel Recommendation Detail	
* Indicates required fields	
Location Details	Hotel ©
Division Name	Name *
ASME CA Connect Training Company	
Address Line 1	Address *
2 Park Avenue	
Address Line 2	Country *
	Select Country
Country	City *
United States	
State	Zip/Postal Code
New York	
City	Phone *
New York	ext.
Zip/Postal Code	
10016	Fax +
	Miles from hotel to site *
irport	Emergency Contact
iame *	Name *
ity *	Phone *
	+ ext.
liles from airport to hotel *	
ransportation *	
Select Transportation	*

- **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.

Hotel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 오 🗅
New York, NY 10016	new york, NY 10013
United States	United States
🕑 Use Valid USPS Address	
▲ · · · · · · · · · · · · · · · · · · ·	
1	Save Ca

108

- **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.

Details Finance					0
\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
Fravel Recomment	dation				
Location Name				Status	
ASME CA Connect Train	ning Company			Complete 🗲	-
2 Park Avenue 오 🗅					
New York, NY 10016					
United States					
Add New Location					+
A				Previo	ous Next
				FIGUR	iner iner

- **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.

\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
Billing					
	cost associated with the revie	w/survey. Any left over rem	ittance will be refunded.		
Billing Address		Company B	anking Details 🚽		
Use Plant Address Use	Mailing Address		the following information to	allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
out the former		Rank Account	Name / Beneficiary		
Address Line 2		Bank Account	valle / Bellenciary		
		ABA Routing N	umher		
Address Line 3		AbA Routing H	univer		
Address Line 3		Billing Contact	Email		
Country	12	uning contact	Ciritin		
Select Country		Account Numb	er / IBAN #		
City					
		SWIFT Code / B	IC.		
Zip/Postal Code		Swiricouerb	inc.		
		Bank Transit N			
Contact/Attention		Bank Transit N	umber		
Phone Number		Tax ID Number			
	ext.				
		Credit Card Pro	ocessing Form		
		Credit Ca	ard Processing Form 👍	_	

- **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.

Details	Finance				0
Polic	ies Certifications	Stamps	Travel	Billing	Review
ASME Review make sure th View More	nfirm availability dates is/Survey are generally scheduled three ie date ranges you provide allow for yo		cheduled a minimum 10 w	eeks (2.5 month) prior to your c	-
Earliest Date	e ected should be a minimum three mon	the from today's date	Dates Unavailable Add		
		ans non today's date	Start Date	End Date	
					Remove
Sister Locatio	ons		//		

- **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.

etel Information arriott 5 Park Avenue 오 🗅 w York, NY 10016	Airport Information JFK Queens	Emergency Contact Marc Anthony Phone: +1 (212) 5911234
5 Park Avenue 오 🗅	Queens	-
		Phone: +1 (212) 5911234
w York, NY 10016		
	Miles From Airport To Hotel: 1	0
ited States		
les from Hotel to Site: 10		
one: +1 (212) 2021234		

- **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.

////////	///////////////////////////////////////
Banking Details	Billing Address
Bank Name:	1 Park Ave 🖗 🗅
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please upload your company manual	
Instructions: Upload your company manual via the upl	load box below.
Please upload only your Company Manual. No other for	ms should be submitted via this upload box.
1 Upload Company Manual	
Please print, sign and upload the Agreeme	nt Form
Instructions: Please click the "Print Agreement" button	, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your co	omputer. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement Fo	rm. No other forms should be submitted via this upload box.
Download Agreement Form	
Upload Agreement Form	1
	Previous Save

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.

			Ļ
	Previous	Save	Submit

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.

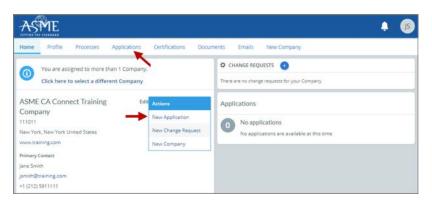
67. Click the blue gear icon and select the Print Document link.



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.

Home Profile	Processes Application	Certifications Documents Emails New Company	
ASME CA Connect 111011 New York, NY www.training.com	ct Training Company	Primary Contact Jane Smith jsmith@training.com +1 (212) 5911111	
Search	Q	AZ -	→ 0

4. The first application tab is the **Policies tab**. Review all information displayed on the tab.

113

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.

AS PIL					
lome Profile P	rocesses Applications	Certifications Doc	uments Emails New	Company	
ASME CA Connect 11011 lew York, NY www.training.com	t Training Company	Primary Contact Jane Smith Jsmith@training.com +1 (212) 5911111			
Activities			Processes		
0 No activities so There are no acti	cheduled vities scheduled for this appl	ication at this time.	U	lication Process rocesses have been started for	this application.
Details Finance			<u>^</u>		(
Policies	Certifications	Stamps	Travel	Billing	Review
ertificates and stamps ca	ucted by ASME, a final invoic innot be issued until the invo	vice is paid.	ain the fees and expenses of th	e ASME Designee. If there is a	balance due to ASME,
		An encire and an encire encire	nalty, deducted from the advar	nced deposit in the following sc	hedule:
• \$3,500 for cancella	ation after acceptance of revi ation within 2 months of revi ation within 1 months of revi	ew/survey dates.			
Extension Policy					
		in date stated on a Certificate ration date on the Certificate.		Il applicable fees, including adv	ance payments, must be
				. Furthermore, the Certificate F	lolder must indicate
			ite when completing the Sched	uling Information Form.	
ASME cannot schedule t	he review/survey on the dat	es included, then an extensio			
		General Downloads for more	information.		
_	lequest for Extension under				

9. The **Policies** tab is updated to reflect a green checkmark. The application data processing will advance to the **Certifications tab**.

114

10. Click the Manage/Select Certifications link or checkbox.

Details Finance					0
\bigcirc	\bigcirc				
Policies	Certifications	Stamps	Travel	Billing	Review
 Manage/Select Certifica Sites. 	tions				
There are no additional si	tes or addresses related to this a	pplication (at this time)			
+ Site + Address					
				Previous	Save Next

- **11.** The Certificate Types form is displayed. Select the RTP certificate type.
- **12.** When done, click **Apply** to continue.

Certifica	ite Types X
ltem	Certification
	RTP - Reinforced Plastic Pressure
1	
	. —
	Apply Close

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

Details Finance					0
\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Certif	ications				
RTP Scope Statement					
Sites					
	l sites or addresses related to	this application (at this t	ime)		
+ Site + Address					1
				Previous Sav	ve Next

- 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.

Details Finance					0
\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
to your computer as a pdf Please upload the comple 다 Download Suppleme	the "Download Supplemental For f file. tted form via the "Upload Supplen				i save the completed form
Upload Supplementa Opload Supplem	Il Form (PDF)				↓
				Previous	Save Next

- 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.

Travel Recommendation Detail	
* Indicates required fields	
Location Details	Hotel 💿
Division Name	Name *
ASME CA Connect Training Company	
Address Line 1	Address *
2 Park Avenue	
Address Line 2	Country *
	Select Country
Country	City *
United States	
State	Zip/Postal Code
New York	
City	Phone *
New York	a ext.
Zip/Postal Code	
10016	Fax + Miles from hotel to site *
sirport	Emergency Contact
lame *	Name*
ity *	Phone * + ext
liles from airport to hotel *	
ransportation *	
Select Transportation	*

- **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.

otel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 오 🗅
New York, NY 10016	new york, NY 10013
United States	United States
🖉 Use Valid USPS Address	
A	

117

- **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.

Policies	Certifications	Stamps	Travel	Billing	Review
avel Recommen	dation				
Location Name				Status	
ASME CA Connect Trai	ning Company			Complete 🔫	•3
2 Park Avenue 오 🗅					
New York, NY 10016					
United States					
Add New Location					-

- **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.

118

- 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.

\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
Billing					
	cost associated with the revie	w/survey. Any left over rem	ittance will be refunded.		
Billing Address		Company B	anking Details 🚽		
Use Plant Address Use	Mailing Address		the following information to	allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
out the factor of		Rank Account	Name / Beneficiary		
Address Line 2		Bank Account	valle / Bellenciary		
		ABA Routing N	umher		
Address Line 3		AbA Routing H	univer		
Address Line 3		Billing Contact	Email		
Country	12	uning contact	Ciritin		
Select Country		Account Numb	er / IBAN #		
City					
		SWIFT Code / B	IC.		
Zip/Postal Code		Swiricouerb	inc.		
		Bank Transit N			
Contact/Attention		Bank Transit N	umber		
Phone Number		Tax ID Number			
	ext.				
		Credit Card Pro	ocessing Form		
		Credit Ca	ard Processing Form 👍	_	

- **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.

Details	Finance				0
Polic	ies Certifications	Stamps	Travel	Billing	Review
ASME Review make sure th View More	nfirm availability dates is/Survey are generally scheduled three ie date ranges you provide allow for yo		cheduled a minimum 10 w	eeks (2.5 month) prior to your c	-
Earliest Date	e ected should be a minimum three mon	the from today's date	Dates Unavailable Add		
		ans non today's date	Start Date	End Date	
					Remove
Sister Locatio	ons		//		

- **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.

etel Information arriott 5 Park Avenue 오 🗅 w York, NY 10016	Airport Information JFK Queens	Emergency Contact Marc Anthony Phone: +1 (212) 5911234
5 Park Avenue 오 🗅	Queens	-
		Phone: +1 (212) 5911234
w York, NY 10016		
	Miles From Airport To Hotel: 1	0
ited States		
les from Hotel to Site: 10		
one: +1 (212) 2021234		

- **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.

Banking Details	Billing Address
Bank Name:	1 Park Ave 🛛 🗅
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please upload your company manual	
Instructions: Upload your company manual via the u	upload box below.
Please upload only your Company Manual. No other	forms should be submitted via this upload box.
1 Upload Company Manual	
Please print, sign and upload the Agreem	nent Form
Instructions: Please click the "Print Agreement" butt	on, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your	computer. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement	Form. No other forms should be submitted via this upload box.
Download Agreement Form	
Upload Agreement Form	T
	Previous Save

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.



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.

ASME		↓ (5)
Home Profile Processes Applications	Certifications Docur	nents Emails New Company
You are assigned to more than 1 Company. Click here to select a different Company	•	CHANGE REQUESTS
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 New Application New Change Request New Company	Applications O No applications No applications are available at this time

- 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.

Your Companies lease select an Company from the list below.			
lame	Company ID	Location	Website
SME CA Connect Testing Company	111012	New York, New York United States	www.training.com
ISME CA Connect Training Company	111011	New York, New York United States	www.training.com

3. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.

ASME							M
Home Profile	Processes App	lications	Certificati	ons Docume	nts Emails New Company	(
(\bigcirc)	ned to more than 1 select a different C		•		CHANGE REQUESTS There are no change requests for your	ur Company	
ASME CA Connect 109849 New York, New York Un Primary Contact Myrnatest Trolano myrnaasme7@gmail.co	ited States	any Edit	Actions New Appl New Char New Com	nge Request	Applications Type Application: FAB-130237 Type: AIA	Status Submitted Submitted: 06/17/2019	Activities
Certifications							
Certification Type	Status	E	ffective	Expires			
AIA - AIA-155 Sample Scope Statemer for AIA certification	Active	06/1	8/2019	06/25/2019			

- 4. The **Applications** tab will opens 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.

Search	Q	ĄZ ~		
Application	Туре	Status	Created	Submitted
FAB-130237	AIA	Submitted	06/17/2019	06/17/2019

- 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.
- 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.

ASME	
Home Profile Processes Applications Certifications Docum	nents Emails New Company
ASME CA Connect Training Company 111011 Jane Smith New York, NY jsmith@training.com www.training.com +1 (212) 5911111	
Activities	Processes
No activities scheduled There are no activities scheduled for this application at this time.	0 No active Application Process No application processes have been started for this application.
Details Finance	0
Policies Certifications Stamps	Travel Billing Review
Final Invoice For reviews/Surveys conducted by ASME, a final invoice will be rendered. It will contain certificates and stamps cannot be issued until the invoice is paid. Cancellation - Reviews/Surveys scheduled by ASME	n the fees and expenses of the ASME Designee. If there is a balance due to ASME,
Cancellation of review/survey dates scheduled by ASME is subject to a monetary pena • \$2,000 for cancellation after acceptance of review/survey dates. • \$3,500 for cancellation within 2 months of review/survey dates. • \$6,000 for cancellation within 1 months of review/survey dates.	ity, deducted from the advanced deposit in the following schedule:
Extension Policy In order to be eligible for an extension of the expiration date stated on a Certificate, th received not later than six (6) months prior to the expiration date on the Certificate.	ne renewal application and all applicable fees, including advance payments, must be
This will ensure that the renewal process will be completed prior to the expiration dat available dates more than nine (9) weeks prior to the expiration date of the Certificate	
If ASME cannot schedule the review/survey on the dates included, then an extension v	will be granted.
Please see the Policy on Request for Extension under General Downloads for more inf	formation.
I have reviewed and agreed to the above policies.	
T '	Next

- 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.

Policies	Certifications	Stamps	Travel	Billing	Review
e/Select Certifica					

- **13.** The Certificate Types form is displayed. Select the **AIA-Authorized Inspection Agency** Certificate Type.
- 14. When done, click **Apply** to continue.

Certifica	ate Types	×
ltem	Certification	
	AIA - Authorized Inspection Agency	
1		
	Apply Clos	0
	Apply Clos	e

- **15.** The AIA Certificate Type and Certificate Number that you are renewing will be added to the Certifications tab.
- 16. Click Next to continue.

Details Financ	ce				0
Policies	Certifications	Stamps	Travel	Billing	Review
	eruncations				
Manage/Select C					

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.

Details Financ	ce				0
Policies	Certifications	Stamps	Travel	Billing	Review
Program Type		•			
Upload Supple	emental Form				
Instructions: Pleas	se click the "Download Supp	olemental Form" butto	on, then save it to your c	omputer as a pdf file. N	lext, open the form,
fill it out, and save t	the completed form to you	r computer as a pdf fi	le.		
	completed form via the "Up	load Supplemental Fo	orm" button located belo	w the "Download Supp	lemental Form"
button.					
Download Sup	plemental Form				
Upload Supple	mental Form (PDF)				
			Р	revious Save	Next

- 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.

Policies	Certifications	Stamps	Travel	Billing	Review
avel Recommen	dation				
ocation Name				Status	
SME CA Connect Train Park Avenue 🎗 🗅	ning Company			Not Complete	
ew York, NY 10016					

- 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.

Travel Recommendation Detail 🔫 —	
* Indicates required fields	
Location Details	Hotel 👳
Division Name	Name *
ASME CA Connect Training Company	
Address Line 1	Address *
2 Park Avenue	
Address Line 2	Country *
	Select Country
Country	City *
United States	
State	Zip/Postal Code
New York	
City	Phone *
New York	ext.
Zip/Postal Code	
10016	Fax
	Miles from hotel to site *
Airport	Emergency Contact
lame *	Name *
ity •	Phone *
	+ ext.
Ailes from airport to hotel *	
na an an an an ann an an ann a' fhairt a' gun an	
ransportation *	
Select Transportation	*

- **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.

Please review the addresses below.	
Hotel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 오 🗅
New York, NY 10016	new york, NY 10013
United States	United States
Use Valid USPS Address	Save Cancel

- **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.

Details Finance					
\bigcirc	\bigcirc	\bigcirc		•	
Policies	Certifications	Stamps	Travel	Billing	Review
ravel Recommen	dation			Status	
ASME CA Connect Trail	ning Company			Complete	- A
New York, NY 10016					
United States					
Add New Location					•
A				Previ	ous Next
				U.S. SARA	

- **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.

Policies	Certifications	Stamps	Travel	Billing	Review
Billing					
	r cost associated with the revie	w/survey. Any left over rem	ittance will be refunded.		
Billing Address		Company B	anking Details ┥	-	
Use Plant Address Use	Mailing Address	Please provide	the following information to	allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
Address Line 2		Bank Account I	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
Country		Billing Contact	Email		
Select Country	•				
City		Account Numb	er / IBAN #		
Zip/Postal Code		SWIFT Code / B	ic		
Contact/Attention		Bank Transit N	umber		
Phone Number		Tax ID Number			
+	ext.				
		Credit Card Pro			
		Credit Ca	ard Processing Form 🗲		

- **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.

Details	Finance					0
Poli	cies	Certifications	Stamps	Travel	Billing	Review
ASME Review make sure t View More	he date ranges you	erally scheduled three t		cheduled a minimum 10 we	imeframe for scheduling your eks (2.5 month) prior to your	-
Earliest Dat	-		a fuana ta day ia data	Dates Unavailable Add [
	ected should be a	minimum three month	is from today's date	Start Date	End Date	
						Remove
Sister Locat						

- **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.

etel Information arriott 5 Park Avenue 오 🗅 w York, NY 10016	Airport Information JFK Queens	Emergency Contact Marc Anthony Phone: +1 (212) 5911234
5 Park Avenue 오 🗅	Queens	-
		Phone: +1 (212) 5911234
w York, NY 10016		
	Miles From Airport To Hotel: 1	0
ited States		
les from Hotel to Site: 10		
one: +1 (212) 2021234		

- **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.

//////////	
Banking Details	Billing Address
Bank Name:	1 Park Ave 🛛 🗅
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please upload your company manual	
Instructions: Upload your company manual via the upload	box below.
Please upload only your Company Manual. No other forms	should be submitted via this upload box.
🛨 Upload Company Manual 🚽	
Please print, sign and upload the Agreement I	Form
Instructions: Please click the "Print Agreement" button, the	en save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your comp	uter. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement Form.	No other forms should be submitted via this upload box.
Download Agreement Form	
Upload Agreement Form	1
	Previous Save

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.

			Ļ
	Previous	Save	Submit

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.

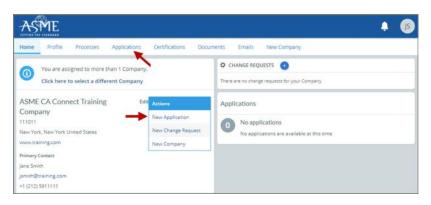
57. Click the blue gear icon and select the **Print Document** link.



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.

Home Profile	Processes	Applications	Certifications	Documents	Emails	New Company	
ASME CA Conne 111011 New York, NY www.training.com	ect Training	Company	Primary Contact Jane Smith jsmith@training.c +1 (212) 5911111				
Search		Q	Ajz ~				→ 0

- 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.

ASPIL						4	JS
Home Profile Pr	ocesses Applications	Certifications Doc	uments En	ails New C	ompany		
ASME CA Connect 111011 New York, NY www.training.com	Training Company	Primary Contact Jane Smith Jsmith@training.com +1 (212) 5911111					
Activities			Processe	s			
No activities sc There are no actvi	heduled ities scheduled for this applica	ation at this time.	U		cation Process ocesses have been started for	r this application.	
Details Finance							0
			6				
Policies	Certifications	Stamps	T	ravel	Billing	Review	
Final Invoice	Certifications	will be rendered. It will cont					
Final Invoice For reviews/Surveys condu certificates and stamps car Cancellation - Revi	inted by ASME, a final involce of the interval of the involce of t	will be rendered. It will cont e is paid. ed by ASME	ain the fees and	expenses of the	ASME Designee. If there is a	balance due to ASME	
Final Invoice For reviews/Surveys condu certificates and stamps car Cancellation - Revie Cancellation of review/surs • \$2,000 for cancellat • \$3,500 for cancellat	icted by ASME, a final invoice i	will be rendered. It will cont e is paid. ed by ASME is subject to a monetary pe w/survey dates. //survey dates.	ain the fees and	expenses of the	ASME Designee. If there is a	balance due to ASME	
Final Invoice For reviews/Surveys condu certificates and stamps car Cancellation - Revie Cancellation of review/surs • \$2,000 for cancellat • \$3,500 for cancellat	ucted by ASME, a final invoice nnot be issued until the invoic ews/Surveys schedule vey dates scheduled by ASME tion after acceptance of review son within 2 months of review	will be rendered. It will cont e is paid. ed by ASME is subject to a monetary pe w/survey dates. //survey dates.	ain the fees and	expenses of the	ASME Designee. If there is a	balance due to ASME	
Final Invoice For reviews/Surveys conducet/filcates and stamps car Cancellation - Revie Cancellation of review/surv • \$2,000 for cancellat • \$3,500 for cancellat • \$6,000 for cancellat Extension Policy In order to be eligible for a	ucted by ASME, a final invoice nnot be issued until the invoic ews/Surveys schedule vey dates scheduled by ASME tion after acceptance of review son within 2 months of review	will be rendered. It will cont e is paid. ed by ASME is subject to a monetary pe w/survey dates. u/survey dates. u/survey dates. date stated on a Certificate	ain the fees and nalty, deducted , the renewal ap	expenses of the	ASME Designee. If there is a	balance due to ASME hedule:	
Final Invoice For reviews/Surveys conducertificates and stamps car Cancellation - Revie Cancellation of review/surv • \$2,000 for cancellat • \$3,500 for cancellat • \$6,000 for cancellat Extension Policy In order to be eligible for a received not later than six This will ensure that the re	acted by ASME, a final invoice on not be issued until the invoic ews/Surveys schedule wey dates scheduled by ASME ion after acceptance of review ion within 2 months of review ion within 1 months of review in extension of the expiration (6) months prior to the expira- newal process will be completed	will be rendered. It will cont e is paid. ed by ASME is subject to a monetary pe w/survey dates. //survey dates. //survey dates. //survey dates. //survey dates. //survey dates.	ain the fees and naity, deducted , the renewal ap	expenses of the from the advanc	ASME Designee. If there is a ed deposit in the following sc applicable fees, including adv	balance due to ASME hedule: ance payments, mus	
Final Invoice For reviews/Surveys conducertificates and stamps car Cancellation - Revie Cancellation of review/surv • \$2,000 for cancellat • \$3,500 for cancellat • \$6,000 for cancellat Extension Policy In order to be eligible for a received not later than six This will ensure that the re available dates more than	sected by ASME, a final invoice of note be issued until the invoic ews/Surveys schedule wey dates scheduled by ASME tion after acceptance of review ton within 2 months of review ton within 1 months of review in extension of the expiration (6) months prior to the expira- newal process will be complet- nine (9) weeks prior to the expira-	will be rendered. It will cont e is paid. ed by ASME is subject to a monetary pe w/survey dates. //survey dates. //survey dates. date stated on a Certificate tion date on the Certificate ted prior to the expiration of piration date of the Certificate	ain the fees and naity, deducted , the renewal ap late indicated or tet when complet	expenses of the from the advanc plication and all a the Certificate. I	ASME Designee. If there is a ed deposit in the following sc applicable fees, including adv	balance due to ASME hedule: ance payments, mus	
Final Invoice For reviews/Surveys conducertificates and stamps car Cancellation - Revie Cancellation of review/sun • \$2,000 for cancellat • \$3,500 for cancellat • \$6,000 for cancellat Extension Policy In order to be eligible for a received not later than six This will ensure that the re available dates more than If ASME cannot schedule th	acted by ASME, a final invoice on not be issued until the invoic ews/Surveys schedule wey dates scheduled by ASME ion after acceptance of review ion within 2 months of review ion within 1 months of review in extension of the expiration (6) months prior to the expira- newal process will be completed	will be rendered. It will cont e is paid. ed by ASME is subject to a monetary pe w/survey dates. u/survey dates. u/survey dates. date stated on a Certificate ted prior to the expiration of piration date of the Certificate included, then an extensio	ain the fees and nalty, deducted , the renewal ap late indicated or ite when comple	expenses of the from the advanc plication and all a the Certificate. I	ASME Designee. If there is a ed deposit in the following sc applicable fees, including adv	balance due to ASME hedule: ance payments, mus	

- 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.

Policies Certification:	Stamps	Travel	Billing	Review

- **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.

Certifica	ite Types	×
ltem	Certification	
	A - Power Boiler Assemblies	
	A (Additional 1) - Power Boiler Assemblies	
	A (Additional 2) - Power Boiler Assemblies	
	E - Electric Boilers	
	E (Additional 1) - Electric Boilers	
	E (Additional 2) - Electric Boilers	
	H1 - Cast Iron Heating Boilers	
	H1 (Additional 1) - Cast Iron Heating Boilers	
	H1 (Additional 2) - Cast Iron Heating Boilers	
	U2 Carel Diration Dellana	
	Apply Close	

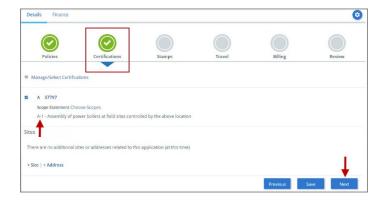
13. The **Boiler** Certificate Type(s) you selected will be added to the Certifications tab. Click the **Choose Scopes** link.

		\bigcirc	\bigcirc	\bigcirc	\bigcirc
Policies	Certifications	Stamps	Travel	Billing	Review
A 57797					
Scope Statement Ci	hoose Scopes				
Scope Statement Cl	hoose Scopes				
tes	sites or addresses related to thi	s application (at this time)			
tes	1	s application (at this time)			

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.

	A-1 - Assembly of power boilers at field sites controlled by the above location
0	A-2 - Assembly of power boilers at the above location and field sites controlled by the above locati
T	
Τ	
T	
T	
Τ	

- **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.



135

- **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.

Policies	Certifications	Stamps	Travel	Billog	Environ
Program Type	Connections		nara	Dam's	10,000
Boller					
Do you hold an "R"	Stamp with the Natio	nal Board?			
Tes, I hold an "R" Sta	mp 🔶				
To apply for a National Bo	ard 'R" Certificate of Authoriz	ation, please check this box	and contact the national Bo	ard of Boiler and Pressure V	essel Inspectors
	ard "R" Certificate of Authoriz at 1-614-888-8320 or visit the			ard of Boiler and Pressure V	essel Inspectors
Accreditation Department	at 1-614-888-8320 or visit the			and of Boiler and Pressure V	essel Inspectors
Accreditation Department	at 1-614-888-8320 or visit the			ard of Boiler and Pressure Vi	essel Inspectors
	at 1-614-888-8320 or visit the			ard of Boiler and Pressure Vi	essel Inspectors
Accreditation Department Authorized Inspect Select AIA Organization	at 1-614-888-8320 or visit the			and of Boller and Pressure Ve	essel inspectors
Accreditation Department Authorized Inspect Select AIA Organization Stamp Selection	at 1-614-888-8320 or visit the	er website to submit the "#	Stamp aplication		
Accreditation Department Authorized Inspect Select AIA Organization Stamp Selection	at 1-614-888-8320 or visit the ion Agency to the number of ASME Single	er website to submit the "#	Stamp aplication		
Accreditation Department Authorized Inspect Select AIA Organization Stamp Selection NEW APPLICANTS: Indica	at 1-614-888-8320 or visit the ion Agency to the number of ASME Single	er website to submit the "#	Stamp aplication		
Accreditation Department Authorized Inspect Select AIA Organization Stamp Selection <u>NEW APPLICANTS</u> ; Indica Number of Marks request	at 1-614-888-8320 or visit the ion Agency to the number of ASME Single	er website to submit the "#	Stamp aplication		
Accreditation Department Authorized Inspect Select AIA Organization Stamp Selection Number of Marks request 1/2* 0 3/4* 0	at 1-614-888-8320 or visit the ion Agency to the number of ASME Single	er website to submit the "k" v	Stamp aplication		

- **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.

Details Finance					(
\bigcirc	\bigcirc	\bigcirc			
Policies	Certifications	Stamps	Travel	Billing	Review
Travel Recommen	dation				
Location Name				Status	
ASME CA Connect Train	ning Company 🚽 💶			Not Complete	
2 Park Avenue 오 🖸					
New York, NY 10016					
United States					
Add New Location					
				Previou	is Next

- 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.

Travel Recommendation Detail 🚽 —	
* Indicates required fields	
Location Details	Hotel 💿
Division Name	Name *
ASME CA Connect Training Company	
Address Line 1	Address *
2 Park Avenue	
Address Line 2	Country *
	Select Country
Country	City *
United States	
State	Zip/Postal Code
New York	
City	Phone *
New York	ext.
Zip/Postal Code	
10016	Fax
	•
	Miles from hotel to site *
Airport	Emergency Contact
lame *	Name *
ame ~	Name -
ity*	Phone *
ny -	+ ext.
files from airport to hotel *	
ransportation * Select Transportation	*

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.

137

28. When done, click Save to continue.

Please review the addresses below.	
Hotel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 💡 🗅
New York, NY 10016	new york, NY 10013
United States	United States
Use Valid USPS Address	Save Cancel

- 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.

etails Finance					
\bigcirc	\bigcirc				
Policies	Certifications	Stamps	Travel	Billing	Review
ravel Recommen	dation				
Location Name				Status	
ASME CA Connect Trai	ning Company			Complete	-
2 Park Avenue 오 🗅					
New York, NY 10016					100
United States					
Add New Location					+
▲				Previ	ous Next
				U.S. SARA	

- **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.

Policies	Certifications	Stamps	Travel	Billing	Review
Dilling					
Billing retainer is billed to cover	r cost associated with the revie	w/survey. Any left over rem	ittance will be refunded.		
Billing Address		Company B	anking Details ┥	-	
Use Plant Address Use	Mailing Address		the following information to	allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
Address Line 2		Bank Account I	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
Country		Billing Contact	Email		
Select Country					
City		Account Numb	er / IBAN #		
Zip/Postal Code		SWIFT Code / B	IC		
• • • • • • • • • • • • • • • • • • • •					
Contact/Attention		Bank Transit N	umber		
Phone Number		Tax ID Number			
·	ext.				
		Credit Card Pro	ocessing Form		
		100.	ard Processing Form	_	

- **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.

Details	Finance				0	
Polici	es Certifications	Stamps	Travel	Billing	Review	
ASME Review make sure th View More	nfirm availability dates s/Survey are generally scheduled three e date ranges you provide allow for you		cheduled a minimum 10 w	eeks (2.5 month) prior to your c	-	
Earliest Date	cted should be a minimum three month	s from today's date	Dates Unavailable Add			
		is noni today s date	Start Date	End Date		
					Remove	
Sister Locatio	ons					

- **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.

Travel edit			
Division Information	Hotel Information	Airport Information	Emergency Contact
I Park Ave 💡 🗅	Marriott	JFK	Marc Anthony
New York, NY 10016	475 Park Avenue 오 🗅	Queens	Phone: +1 (212) 5911234
Jnited States	New York, NY 10016	Miles From Airport To Hotel: 1	10
	United States		
	Miles from Hotel to Site: 10		
	Phone: +1 (212) 2021234		
Billing edit			
Billing edit	orm		

- 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.

	///////////////////////////////////////
Banking Details	Billing Address
Bank Name:	1 Park Ave 💡 🗅
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please print, sign and upload the Agreement Form	
Instructions: Please click the "Print Agreement" button, then save it to your of	computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your computer. Finally, uploa	ad the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement Form. No other forms sh	nould be submitted via this upload box.
Download Agreement Form	
± Upload Agreement Form	↓
	Previous Save

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.

					Ļ	
			Previous	Save	Submit	

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.

Certifications			
Certification Type	Status	Effective	Expires
	Pending	-	
A - 57762	Active	07/03/2019	07/03/2023
A-1 - Assembly of power boilers at field sites controlled by the above location			

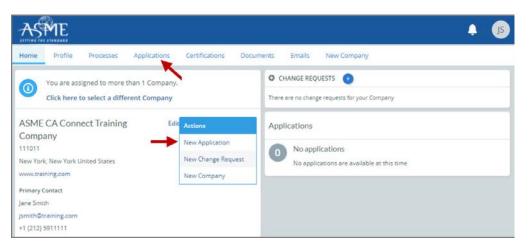
- **51.** On the top right side of the tab, there is a blue gear icon that lets you **Print** the application.
- 52. Click the blue gear icon and select the **Print Document** link.

Details Finance	Print Document
Application Details Application ID: FAB-130263	T

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.

ASME				JS
Your Companies Please select an Company from the list below.				
Name	Company ID	Location	Website	
ASME CA Connect Testing Company	111012	New York, New York United States	www.training.com	
ASME CA Connect Training Company	111011	New York, New York United States	www.training.com	
If you do not see the Company you are looking for, please contact your represen Choose Persona Logout	tative and ask them to grant you	A ACCESS.		

ASME						
Home Profile	Processes App	lications	Certificatio	ons Docume	ents Emails New Com	npany	
	ned to more than 1 select a different (20 25			CHANGE REQUESTS		
ASME CA Connect	Training Compa	ny Edit	Actions		Applications		
109829 New York, New York Uni www.abc.com	ited States		New Applica		Туре	Status	Activities
Primary Contact Myrnatest Troiano			New Compa	ny	Application: FAB-130238 Type: BPE	Submitted Submitted: 06/18/2019	0
myrnaasme7@gmail.com	m						
Certifications							
Certification Type	Status		ffective	Expires			
BPE - BPE-184	Pending	06/	24/2019	06/25/2019			

- 4. The **Applications** tab will opens 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.

Search	٩	AĴZ ~		
Application	Туре	Status	Created	Submitted
FAB-130237	AIA	Submitted	06/17/2019	06/17/2019

- 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.
- 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.

ASME				
Home Profile Processes Applications	Certifications Docur	ments Emails N	New Company	
ASME CA Connect Training Company 111011 New York, NY www.training.com	Primary Contact Jane Smith Jsmith@training.com +1 (212) 5911111			
Activities		Processes		
0 No activities scheduled There are no actvities scheduled for this appli	ation at this time.	U	Application Process on processes have been started for	this application.
Details Finance				0
Policies Certifications	Stamps	Travel	Billing	Review
Final Invoice For reviews/Surveys conducted by ASME, a final involce certificates and stamps cannot be issued until the invol		in the fees and expenses (of the ASME Designee. If there is a l	palance due to ASME,
Cancellation - Reviews/Surveys schedu Cancellation of review/survey dates scheduled by ASMI		alter deducted from the a	dunneed departs in the following co	adula
\$2,000 for cancellation after acceptance of revie \$3,500 for cancellation within 2 months of revie \$6,000 for cancellation within 1 months of revie	w/survey dates. w/survey dates.	ary, deducted from the ar	uvanced deposit in the following sc	ieudie.
Extension Policy				
In order to be eligible for an extension of the expiration received not later than six (6) months prior to the expir		he renewal application ar	nd all applicable fees, including adv	ance payments, must be
This will ensure that the renewal process will be compl available dates more than nine (9) weeks prior to the e				lolder must indicate
If ASME cannot schedule the review/survey on the date	s included, then an extension	will be granted.		
Please see the Policy on Request for Extension under <mark>G</mark>	eneral Downloads for more in	formation.		
I have reviewed and agreed to the above policies.	1			
T				Next

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

tails Finance					
Policies	Certifications	Stamps	Travel	Billing	Review

- **13.** The Certificate Types is displayed. Select the BPE Certificate Type.
- 14. When done, click Apply to continue.

Certifica	ate Types
ltem	Certification
	BPE - BPE Certification
-0	BPE (Additional 1) BPE Certification
	RPE (Additional 2) - BPE Certification
	,

- **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.

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Certifica	itions				
BPE BPE-184 🚄					
Scope Statement					
ites					
There are no additional s	ites or addresses related to this	application (at this time)			
+ Site + Address					

- 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.

Details Finance					•
Policies	Certifications	Stamps	Travel	Billing	Review
Program Type					
BPE					
Upload Supplem	ental Form				
Instructions: Please of	lick the "Download Suppleme	ntal Form" button, then s	ave it to your computer as	a pdf file. Next, open the f	orm, fill it out, and save
the completed form to	o your computer as a pdf file.				
Please upload the com	npleted form via the "Upload S	upplemental Form" butto	on located below the "Dow	nload Supplemental Form	" button.
Download Supple	emental Form				
1 Upload Suppleme	ental Form (PDF)				Ţ
				Previous Sav	ve Next

- 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.

etails Finance					
Policies	Certifications	Stamps	Travel	Billing	Review
avel Recomment	dation			Status	
ASME CA Connect Train 2 Park Avenue 오 🗅 New York, NY 10016 Jnited States	ning Company			Not Complete	
				Previou	sNext

- 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.

Travel Recommendation Detail	
* Indicates required fields	
Location Details	Hotel ©
Division Name	Name *
ASME CA Connect Training Company	
Address Line 1	Address *
2 Park Avenue	
Address Line 2	Country *
	Select Country
Country	City *
United States	
State	Zip/Postal Code
New York	
City	Phone *
New York	ext.
Zip/Postal Code	
10016	Fax
	Miles from hotel to site *
irport	Emergency Contact
ame *	Name *
ity *	Phone *
	* ext.
iles from airport to hotel *	
NOU CONTRACTOR AND	
ansportation *	
Select Transportation	

- **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.

otel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 오 🗅
New York, NY 10016	new york, NY 10013
United States	United States
🖉 Use Valid USPS Address	
A	

- **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.

Details Finance					0
\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
Fravel Recomment	dation				
Location Name				Status	
ASME CA Connect Train	ning Company			Complete 🗲	
2 Park Avenue 오 🗅					
New York, NY 10016					
United States					
Add New Location					+
A				Previo	ous Next
				FIGUR	iner iner

- **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.

			\bigcirc		\bigcirc
Policies	Certifications	Stamps	Travel	Billing	Review
Billing					
retainer is billed to cove	r cost associated with the revie	w/survey. Any left over rem	lttance will be refunded.		
Billing Address		Company B	anking Details ┥	-	
Use Plant Address Use	Mailing Address		the following information to	allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
Address Line 2		Bank Account	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
Country		Billing Contact	Email		
Select Country					
City		Account Numb	er / IBAN #		
Cip/Postal Code		SWIFT Code / B	IC		
ontact/Attention		Bank Transit N	umber		
hone Number		Tax ID Number			
	ext.				
		1			
		Credit Card Pro	ocessing Form ard Processing Form		1
		pdf Credit Ca	ard Processing Form		

- **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.

Details	Finance				0
Polic	ies Certifications	Stamps	Travel	Billing	Review
ASME Review make sure th View More	nfirm availability dates is/Survey are generally scheduled three ie date ranges you provide allow for yo		cheduled a minimum 10 w	eeks (2.5 month) prior to your c	-
Earliest Date	e ected should be a minimum three mon	the from today's date	Dates Unavailable Add		
		ans non today's date	Start Date	End Date	
					Remove
Sister Locatio	ons		//		

- **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.

Travel edit			
Division Information	Hotel Information	Airport Information	Emergency Contact
1 Park Ave 🎙 🗅	Marriott	JFK	Marc Anthony
New York, NY 10016	475 Park Avenue 오 🗅	Queens	Phone: +1 (212) 5911234
United States	New York, NY 10016	Miles From Airport To Hotel: 1	0
	United States		
	Miles from Hotel to Site: 10		
	Phone: +1 (212) 2021234		
Billing edit 🚽 🗕			

- **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.

Banking Details	Billing Address
Bank Name:	1 Park Ave 오 🗅
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please upload your company manual	
Instructions: Upload your company manual via the i	upload box below.
Please upload only your Company Manual. No other	forms should be submitted via this upload box.
1 Upload Company Manual	
Please print, sign and upload the Agreen	nent Form
Instructions: Please click the "Print Agreement" butt	on, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your	computer. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement	Form. No other forms should be submitted via this upload box.
Download Agreement Form	
Upload Agreement Form	Ţ
	Previous Save

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.

ASME				A MT
Home Profile Processes Applications	Certifications Docu	ments Emails New Compa	iny	
(1) You are assigned to more than 1 Company Click here to select a different Company		CHANGE REQUESTS O There are no change requests for you	ır Company	
ASME CA Connect Training Company Edit 109852 New York, New York United States Primary Contact Myrnatest Troiano myrnaasme?@gmail.com	Actions New Application New Change Request New Company	Applications Type Application: FAB-130240 Type: NQA	Status Submitted Submitted: 06/18/2019	Activities
Certifications				
Certification Type Status El	fective Expires			
NQA - NQA - 128 Active 06/1 Sample NQA training	8/2019 06/18/2022			

- 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.

ASME			↓ (§
Your Companies Please select an Company from the list below.			
Name	Company ID	Location	Website
ASME CA Connect Testing Company	111012	New York, New York United States	www.training.com
ASME CA Connect Training Company	111011	New York, New York United States	www.training.com
If you do not see the Company you are looking for, please contact your representative and ask Choose Persona Logout	, them to grant you	access.	

Home Profile	Processes Ap	plications Certific	ations Docum	ents Emails New Compa	ny	
You are ass	igned to more than	1 Company.		CHANGE REQUESTS		
Click here t	o select a different	Company		There are no change requests for yo	ur Company	
ASME CA Connec	t Training Comp	any Edit Actions		Applications		
New York, New York U	nited States	New Ch	ange Request	Туре	Status	Activities
Primary Contact		New Cor	mpany	Application: FAB-130287	Open	
Myrnatest Troiano				Type: NQA		0
nyrnaasme7@gmail.c	om					
				Application: FAB-130240	Submitted	0
Certifications				Type: NQA	Submitted: 06/18/2019	
Certification Type	Status	Effective	Expires			
NQA - NQA-128	Active	06/18/2019	06/18/2022			
Sample Natraining						

- 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.

Search	٩	AZ v		
Application	Туре	Status	Created	Submitted
FAB-130237	NQA	Submitted	06/17/2019	06/17/2019

- 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.
- 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.

ASME				a) II
Home Profile Processes Applications	Certifications Docur	ments Emails New C	ompany	
ASME CA Connect Training Company 111011 New York, NY www.training.com	Primary Contact Jane Smith Jsmith@training.com +1 (212) 5911111			
Activities		Processes		
0 No activities scheduled There are no activities scheduled for this appl	ication at this time.	No active Appli No application pro	cation Process ocesses have been started for	this application.
Details Finance				0
Policies Certifications	Stamps	Travel	Billing	Review
Final Invoice For reviews/Surveys conducted by ASME, a final invoic certificates and stamps cannot be issued until the invo		n the fees and expenses of the	ASME Designee, If there is a b	palance due to ASME,
Cancellation - Reviews/Surveys schedu Cancellation of review/survey dates scheduled by ASM		alty, deducted from the advance	ed deposit in the following sci	redule.
 \$2,000 for cancellation after acceptance of revi \$3,500 for cancellation within 2 months of revi \$6,000 for cancellation within 1 months of revi 	ew/survey dates. ew/survey dates.		ee eepose in one ronoming se	
Extension Policy				
In order to be eligible for an extension of the expiratic received not later than six (6) months prior to the expi		he renewal application and all	applicable fees, including adva	ance payments, must be
This will ensure that the renewal process will be comp available dates more than nine (9) weeks prior to the (lolder must indicate
If ASME cannot schedule the review/survey on the dat	es included, then an extension	will be granted.		
Please see the Policy on Request for Extension under	General Downloads for more in	formation.		
I have reviewed and agreed to the above policies.	1			
T	l			Next

- **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.

Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Cert	ifications				
es					
nere are no addition	al sites or addresses related	to this application (at thi	s time)		

- The Certificate Types form is displayed. Select the NQA Certificate Type.
 When done, click **Apply** to continue.

Certifica	ate Types	×
ltem	Certification	
	NQA - NQA-1 Quality Program Certificate	
	NQA (Additional 1) -NQA 1 Quality Program Certificate	
	NQA (Additional 2) - NQA-1 Quality Program Certificate	
	Apply Clos	e

14. The NQA Certificate Type and Certificate Number that you are renewing will be added to the Certifications tab.

157

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

Details Finance					0
\bigcirc					\bigcirc
Policies	Certifications	Stamps	Travel	Billing	Review
 Manage/Select Certi NQA NQA-128 Scope Statement 					
Sites					
There are no additiona	al sites or addresses related	to this application (at th	is time)		
+ Site + Address					1
				Previous Sav	ve Next

- **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.

Details Finance					0
		\bigcirc			
Policies	Certifications	Stamps	Travel	Billing	Review
the completed form to	click the "Download Supplemer o your computer as a pdf file. npleted form via the "Upload S				
1 Upload Suppleme	ental Form (PDF)				1
				Previous Sav	re Next

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.

Policies	Certifications	Stamps	Travel	Billing	Review
avel Recommend	dation				
Location Name				Status	
ASME CA Connect Trair	ing Company			Not Complete	
2 Park Avenue 💡 🗅					
New Year NIV 1001C					
New York, NY 10016					

- 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.

Travel Recommendation Detail ┥ 🗕	
* Indicates required fields	
Location Details	Hotel ©
Division Name	Name*
ASME CA Connect Training Company	Name -
Address Line 1	Address *
2 Park Avenue	Address *
Address Line 2	
Address Line Z	Country * Select Country
Country United States	City *
State New York	Zip/Postal Code
City New York	Phone *
	ext.
Zip/Postal Code	Fax
10016	
	Miles from hotel to site *
sirport	Emergency Contact
lame *	Name *
ity *	Phone *
	+ ext.
liles from airport to hotel *	
ransportation *	
Select Transportation	

- **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.

Please review the addresses below.	
Hotel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 오 🗅
New York, NY 10016	new york, NY 10013
United States	United States
☑ Use Valid USPS Address	
1	Save Cancel

- **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.

Details Finance					e
\bigcirc	\bigcirc	\bigcirc		•	
Policies	Certifications	Stamps	Travel	Billing	Review
ravel Recommend	dation				
Location Name				Status	
ASME CA Connect Train	ning Company			Complete	• 3
2 Park Avenue 오 🗅					
New York, NY 10016					
United States					
Add New Location					
A				Previo	us Next
				Freedo	INCAL

- **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.

			\bigcirc		\bigcirc
Policies	Certifications	Stamps	Travel	Billing	Review
Billing					
retainer is billed to cove	r cost associated with the revie	w/survey. Any left over rem	lttance will be refunded.		
Billing Address		Company B	anking Details ┥	-	
Use Plant Address Use	Mailing Address		the following information to	allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
Address Line 2		Bank Account	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
Country		Billing Contact	Email		
Select Country					
City		Account Numb	er / IBAN #		
Cip/Postal Code		SWIFT Code / B	IC		
ontact/Attention		Bank Transit N	umber		
hone Number		Tax ID Number			
	ext.				
		1			
		Credit Card Pro	ocessing Form ard Processing Form		1
		pdf Credit Ca	ard Processing Form		

- **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.

Details	Finance					0
Poli	cies	Certifications	Stamps	Travel	Billing	Review
ASME Review make sure t View More	he date ranges you	erally scheduled three t		cheduled a minimum 10 we	imeframe for scheduling your eks (2.5 month) prior to your	-
Earliest Dat	-		a fuana ta day ia data	Dates Unavailable Add [
	ected should be a	minimum three month	is from today's date	Start Date	End Date	
						Remove
Sister Locat						

- **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.

etel Information arriott 5 Park Avenue 오 🗅 w York, NY 10016	Airport Information JFK Queens	Emergency Contact Marc Anthony Phone: +1 (212) 5911234
5 Park Avenue 오 🗅	Queens	-
		Phone: +1 (212) 5911234
w York, NY 10016		
	Miles From Airport To Hotel: 1	0
ited States		
les from Hotel to Site: 10		
one: +1 (212) 2021234		

- **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.

Banking Details	Billing Address
Bank Name:	1 Park Ave 🛛 🗅
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	United states
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please upload your company manual	
Instructions: Upload your company manual via the upl	load box below.
Please upload only your Company Manual. No other for	rms should be submitted via this upload box.
1 Upload Company Manual	
Please print, sign and upload the Agreeme	nt Form
Instructions: Please click the "Print Agreement" button	, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your co	mputer. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement Fo	rm. No other forms should be submitted via this upload box.
Download Agreement Form	
Upload Agreement Form	T
	Previous Save

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.

			1
	Previous	Save	Submit

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.

ASME						÷ м
Home Profile Pr	ocesses Applica	tions Certificatio	ons Docume	ents Emails New Compan	y	
	d to more than 1 Co lect a different Con			CHANGE REQUESTS O	ur Company	
ASME CA Connect Tr	raining Company			Applications		
109842	12-010-	New Apple	cation ge Request	Туре	Status	Activities
New York, New York United Primary Contact Myrnatest Troiano myrnaasme7@gmail.com	l States	New Comp	The second second	Application: FAB-130231 Type: Nuclear	Submitted Submitted: 06/17/2019	0
Certifications						
Certification Type	Status	Effective	Expires			
N (Additional 1) - N-4788 scope sitexxxxxx	Active	06/18/2019	06/24/2019			
N - N-4787 scope entered for nuclear corporate	Active	06/18/2019	06/21/2019			

- b. If you are associated with multiple companies, you will first be directed to a list of your companies.
 - 1) Once you select the Company, you will be directed to the Company Dashboard.

Your Companies Nease select an Company from the list below.			
Name	Company ID	Location	Website
ASME CA Connect Testing Company	111012	New York, New York United States	www.training.com
ASME CA Connect Training Company	111011	New York, New York United States	www.training.com

ASME					. MT
Home Profile Processes	Applications	Certifications Docum	ents Emails New Compar	у	
(i) You are assigned to mo Click here to select a d			CHANGE REQUESTS	our Company	
ASME CA Connect Training	Company	Actions	Applications		
109842	1. 1. 1. S. 1. 1.	New Application New Change Request	Туре	Status	Activities
New York, New York United States Primary Contact	1	New Company	Application: FAB-130231 Type: Nuclear	Submitted Submitted: 06/17/2019	0
Myrnatest Trolano myrnaasme7@gmail.com					
Certifications					
Certification Type Statu	s Effe	ctive Expires			
N (Additional 1) - N-4788 Active scope sitexxxxxx	06/18/	2019 06/24/2019			
N - N-4787 Active	06/18/	2019 06/21/2019			
scope entered for nuclear corporate					

- 4. The Applications tab will open so that you can begin create a new application for the renewal certification process.
- 5. The default and first Application tab is the **Policies** tab. Review all information displayed on the tab.
- 6. Scroll down the page to the Extension Policy section.
- 7. If you want to see the policy on Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
- 8. Check the I have reviewed and agreed to the above policies box.

9. Click **Next** to continue.

ASME				Ļ,
Home Profile Processes Applications	Certifications Docu	iments Emails	New Company	
ASME CA Connect Training Company 111011 New York, NY www.training.com	Primary Contact Jane Smith Jsmith@training.com +1 (212) 5911111			
Activities		Processes		
No activities scheduled There are no activities scheduled for this appli	cation at this time.	U	e Application Process ation processes have been started fo	r this application.
Details Finance				0
			\bigcirc	
Policies Certifications Final Invoice	Stamps	Travel	Billing	Review
For reviews/Surveys conducted by ASME, a final invoice certificates and stamps cannot be issued until the invo		in the fees and expense	es of the ASME Designee. If there is a	balance due to ASME,
Cancellation - Reviews/Surveys schedu	led by ASME			
Cancellation of review/survey dates scheduled by ASM	E is subject to a monetary per	a <mark>lty</mark> , deducted from the	advanced deposit in the following sc	hedule:
• \$2,000 for cancellation after acceptance of revie	ew/survey dates.			
• \$3,500 for cancellation within 2 months of revie				
 \$6,000 for cancellation within 1 months of review 	w/survey dates.			
Extension Policy				
In order to be eligible for an extension of the expiratio		the renewal application	and all applicable fees, including adv	ance payments, must be
received not later than six (6) months prior to the expire	ration date on the Certificate.			
This will ensure that the renewal process will be compl				Holder must indicate
available dates more than nine (9) weeks prior to the e	xpiration date of the Certificat	te when completing the	Scheduling Information Form.	
If ASME cannot schedule the review/survey on the date	es included, then an extension	will be granted.		
Please see the Policy on Request for Extension under C	Seneral Downloads for more in	nformation.		
I have reviewed and agreed to the above policies.				
T				Next

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

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Certifica	ations				
Sites					
There are no additional s	ites or addresses related to this a	application (at this time)			
+ Site + Address					
				Previous	Save Next

- The Certificate Types form is displayed containing a list of Nuclear Certificate Types. Select the Certificate Type for the certificate(s) you are renewing.
 When done, click **Apply** to continue.

Certifica	ate Types 🗶
ltem	Certification
	N - Nuclear Components
	N (Additional 1) - Nuclear Components
	N (Additional 2) - Nuclear Components
	N (Quality Assurance Program) - Nuclear Components (Quality Assurance Program)
	N3 - Nuclear Components
	N3 (Additional 1) - Nuclear Components
	N3 (Additional 2) - Nuclear Components
	N3 (Quality Assurance Program) - Nuclear Components (Quality Assurance Program)
	NA - Nuclear installation and shop assembly
1	Apply Close

15. The Certificate Type and Certificate Number you are renewing will be added to the Certifications Tab.

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Certifica		and the	THE REAL	Surrog 2	netist
N N-4787	-				
N (Additional 1) N- Scope Statement	4788				
Sites					
There are no additional si	tes or addresses related to this a	pplication (at this time)			
+ Site + Address					1
				Previous	ave Next

- 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.

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Program Type Nuclear					
Authorized Inspec	tion Agency				
Select AIA Organization	(
Upload Supplemer	ntal Form				
Instructions: Please click	k the "Download Supplemental Fo	orm" button, then save it to y	your computer as a pdf file. N	ext, open the form, fill it out, a	nd save the completed
form to your computer a	s a pdf file.				
Please upload the comple	eted form via the "Upload Supple	mental Form* button locate	d below the "Download Suppl	emental Form" button.	
Download Supplem	ental Form				
* Upload Supplement	al Form (PDF)				1
				Previous	Save Next

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.

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Travel Recommen	dation				
Location Name				Status	
ASME CA Connect Train 2 Park Avenue 🕈 🖸 New York, NY 10016 United States	ning Company			Not Complete	
Add New Location					
				Previou	IS Next

- 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.

170

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

Country City United States Zip/ State Zip/ New York Pho City Pho New York Image: Comparison of the system of the syst	* Country *
Division Name Name ASME CA Connect Training Company Image: Company Address Line 1 Add Z Park Avenue Image: Company Address Line 2 Cou Image: Country Image: Country United States Image: Country State Zip/ New York Image: Country City Pho New York Image: Country Zip/Postal Code Image: Country You for Mark Image: Country Xirport Em	* Country *
ASME CA Connect Training Company Address Line 1 2 Park Avenue Address Line 2 Country Country United States State State City New York City City City City City City City City	* Country *
Address Line 1 2 Park Avenue Address Line 2 Country Cuntred States State State City New York City City City City City City City City	* Country •
2 Park Avenue Cou Address Line 2 Cou Country City United States Zip/ State Zip/ New York Image: City Notified States Image: City New York Image: City New York Image: City New York Image: City New York Image: City Nitroff Image: City Address Image: City Notified States Image: City Notified States Image: City Natified States Image: City Nitroff Image: City Nitroff Image: City	* Country •
Address Line 2 Cou Address Line 2 Cou Se Country City New York City City New York City New York City New York City City New York City City City New York City City City New York City Ci	Country •
Secontry City United States Zip/ State Zip/ New York Pho City Pho New York Image: Second State	Country •
Country City City Pho New York City Pho State Zip/ New York City Pho New York City Pho New York City Pho State Code City Mile City City City City City City City City	al Code
United States State Zip/ New York City Pho New York Zip/Postal Code T0016 Fax inport Em	
State Zip/ New York Zip/ City Pho New York Zip/Postal Code 10016 Fax introprt Em	
New York City Pho Xey York Zip/Postal Code Too16 Fax irport Em	
City Pho New York I Zip/Postal Code Fax 10016 Fax irport Em	
New York Zip/Postal Code T0016 Fax inport Em	
irport Em	
10016 Fax + Mile sirport Em	ext.
irport Em	
sirport Em	1 / 1
sirport Em	
	om hotel to site *
	gency Contact
une iver	
ity* Pho	
+	ext.
tiles from airport to hotel *	
nee nem en port te notel	
ransportation *	
Select Transportation	

- **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.

Please review the addresses below.	
Hotel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 오 🗅
New York, NY 10016	new york, NY 10013
United States	United States
Use Valid USPS Address	Save <u>Cancel</u>

- **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.

etails Finance					
\bigcirc	\bigcirc	\bigcirc			
Policies	Certifications	Stamps	Travel	Billing	Review
Location Name ASME CA Connect Trainin	ng Company			Status Complete	
ASME CA Connect Trainin	ng Company			Complete	
2 Park Avenue 오 🗅					
New York, NY 10016					
United States					
Add New Location					•
A				Previo	us Next
				Previo	US NCAL

- **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.

0	0	0	0		0
\bigcirc	\bigcirc	\bigcirc	\bigcirc		
Policies	Certifications	Stamps	Travel	Billing	Review
Billing					
-	r cost associated with the revie	w/survey. Any left over rem	Ittance will be refunded.		
Billing Address		Company B	anking Details ┥	-	
Use Plant Address Use	Mailing Address	Please provide	the following information to	allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
Address Line 2		Bank Account I	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
Country		Billing Contact	Email		
Select Country	•				
City		Account Numb	er / IBAN #		
		-			
Zip/Postal Code		SWIFT Code / B	IC		
Contact/Attention		Bank Transit N	umber		
hone Number		Tax ID Number			
	ext.				
		Credit Card Pro	cessing Form		
			ard Processing Form		

- **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.

Details	Finance				0
Poli	cies Certifications	Stamps	Travel	Billing	Review
ASME Review	onfirm availability dates ws/Survey are generally scheduled three he date ranges you provide allow for you		-		-
Earliest Dat			Dates Unavailable Add Da	ates	
	ected should be a minimum three montl	ns from today's date	Start Date	End Date	
	•				Remove
Sister Locat	ions				

- **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.

Travel edit	Hotel Information	Airport Information	Emergency Contact
I Park Ave 💡 🗅	Marriott	JFK	Marc Anthony
New York, NY 10016	475 Park Avenue 오 🗅	Queens	Phone: +1 (212) 5911234
Jnited States	New York, NY 10016	Miles From Airport To Hotel: 1	10
	United States		
	Miles from Hotel to Site: 10		
	Phone: +1 (212) 2021234		
	Phone: +1 (212) 2021234		
Billing edit 🚽 🗕			

- **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.

	///////////////////////////////////////
Banking Details	Billing Address
Bank Name:	1 Park Ave 오 🖸
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please print, sign and upload the Agreemer	it Form
Instructions: Please click the "Print Agreement" button,	then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your cor	nputer. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement For	m. No other forms should be submitted via this upload box.
Cownload Agreement Form	
1 Upload Agreement Form	1
	Previous Save

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.

			1
	Previous	Save	Submit

- **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.

Details Finance	Print Document
Application Details Application ID: FAB-130263	T

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.

ASME						۰ м
Home Profile Pro	ocesses Applica	ations Certificatio	ns Docume	nts Emails New Company	Y	
	l to more than 1 Co ect a different Cor			CHANGE REQUESTS O	ur Company	
ASME CA Connect Tr 109842	aining Company	Edit Actions New Applic	ation	Applications	Status	Activities
New York, New York United Primary Contact Myrnatest Trolano	States	New Chang New Comp		Application: FAB-130231 Type: Nuclear	Submitted Submitted: 06/17/2019	0
myrnaasme7@gmail.com Certifications						
Certification Type	Status	Effective	Expires			
N (Additional 1) - N-4788 scope sitexxxxxx	Active	06/18/2019	06/24/2019			
N - N-4787 scope entered for nuclear corporate	Active	06/18/2019	06/21/2019			

- b. If you are associated with multiple companies, you will first be directed to a list of your companies.
 - 1) Once you select the Company, you will be directed to the Company Dashboard.

Your Companies Nease select an Company from the list below.			
Name	Company ID	Location	Website
ASME CA Connect Testing Company	111012	New York, New York United States	www.training.com
ASME CA Connect Training Company	111011	New York, New York United States	www.training.com

ASME							
Home Profile P	Processes Application	ons Cer	rtifications	Documents	Emails New Company		
U	ed to more than 1 Com elect a different Comp				CHANGE REQUESTS There are no change requests for you	ir Company	
ASME CA Connect T 109489	raining Company	Edit	Actions		Applications		
New York United States New Application New Application New Change Reque Myrnatest Troiano New Company myrnaasme7@gmail.com		Market Contract of Contract of Contract	туре	Status	Activities		
		The second s	Application: FAB-131017 Type: PRD	Submitted Submitted: 07/17/2019	4		
Certifications							
Certification Type	Status	Ef	fective	Expires			
PRD - PRD-67 Nitrogen - Nitrogen	Active	06/1	18/2019	6/18/2022			

- **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.

ASPIE						JS
Home Profile Processes Applications	Certifications Docur	ments Ema	ails New (Company		
ASME CA Connect Training Company 111011 New York, NY www.training.com	Primary Contact Jane Smith Jsmith@training.com +1 (212) 5911111					
Activities		Processes				
No activities scheduled There are no actvities scheduled for this applic	ation at this time.			ication Process ocesses have been started fo	r this application.	
Details Finance					1	0
Policies Certifications	Stamps	Tra	Davel	Billing	Beview	
Final Invoice For reviews/Surveys conducted by ASME, a final invoice certificates and stamps cannot be issued until the invoi		n the fees and e	expenses of the	e ASME Designee. If there is a	balance due to ASME,	
Cancellation - Reviews/Surveys schedu Cancellation of review/survey dates scheduled by ASME		ty daducted fr	rom the advan	ad dapasit in the following s	bodule	
 \$2,000 for cancellation after acceptance of revie \$3,500 for cancellation within 2 months of revier \$6,000 for cancellation within 1 months of revier 	w/survey dates. w/survey dates.	ity, deddeted if		ee eepose in the following s		
Extension Policy						
In order to be eligible for an extension of the expiration received not later than six (6) months prior to the expir		he renewal appl	lication and all	applicable fees, including adv	ance payments, must be	9
This will ensure that the renewal process will be comple available dates more than nine (9) weeks prior to the ex					Holder must indicate	
If ASME cannot schedule the review/survey on the date	s included, then an extension	will be granted.				
Please see the Policy on Request for Extension under <mark>G</mark>	eneral Downloads for more in	formation.				
I have reviewed and agreed to the above policies.	↑					
T					Next	

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

Details Financ	e				0
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select G Personnel There are no additi	ertifications	his application (at this	time)		
+ Personnel					
			Р	revious Save	Next

- **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.

Certifica	tte Types	3
Item	Certification	
	PRD - Pressure Relief Device	
1		
	Apply Close	

15. The Certificate Type and Certificate Number you are renewing will be added to the Certifications Tab. Click the **Choose Scopes** link.

Details Finance					G
\bigcirc		\bigcirc			
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Certification	ons				
PRD PRD-67					
Scope Statement Choos	se Scopes				
ersonnel					
There are no additional per:	sonnel related to this application	(at this time)			
+ Personnel					
				Previous	Save Next

- 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.

Scopes	×
ltem	Certification
	Nitrogen - Nitrogen
	Steam
	Air
	Water
	Liquids - Liquids
	Natural Gas - Natural Gas
1	
	Apply Close

- The Scope you selected is added to the Certifications tab.
 Select the Personnel link on the Certifications tab.

Policies Image: Select Certifications * ManagerSelect Certifications Stamps * FRO PRD-67 Scope Statement Choole Scopes Nitrogen - Nitrogen * Personnel * The are no additional personnel related to this application (at this time) * Personnel	Details Finance					
	\bigcirc		\bigcirc			
PRD PRD-07 Scope Statement Choose Scopes Nitrogen - Nitrogen ersonnel There are no additional personnel related to this application (at this time)	Policies	Certifications	Stamps	Travel	Billing	Review
Scope Statement Choose Scopes Nitrogen - Nitrogen ersonnel There are no additional personnel related to this application (at this time)	Manage/Select Certificat	ions				
Nitrogen - Nitrogen	PRD PRD-67					
Nitrogen - Nitrogen	Scope Statement Choo	se Scopes				
there are no additional personnel related to this application (at this time)						
There are no additional personnel related to this application (at this time)						
	ersonnel					
+ Personnel	There are no additional pe	rsonnel related to this application	(at this time)			
	+ Personnel					

- **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.

Find Personnel			×
SEARCH/RESULTS		SELECTED PEOPLE Clear	
Search Angel Smith New York, New York	٩	Angel Martinez New York, New York	
Isabel Gomez New York, New York			ī
+ New Personnel	•		Apply

- 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.

irst Name	Last Name	
First Name	Last Name	
Primary Email		
Email Address		
Credentials	Master Customer ID	
-		
rimary Phone		
1 Phone N	umber ext. Extension	

- 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.

Policies	Certifications	Stamps	Travel	Diting	Review
Manage/Select Certificacio	-				
PRD PRD-07 Scope Statement Choos Steem	e Scopes				
Person					
S Isaber Gomez 9 Q1 New York, NY United States			Manager Select Cartification	tors	
Angel Martinez Q Qb New York, NV United States			B Manage Select Certifica	tons 🔶 🛁	

- 27. Select the PRD-Pressure Relief Device certificate type option.
- **28.** When done, click **Apply** to continue.

Certifica	ite Types X	
ltem	Certification	
	PRD - Pressure Relief Device	
1		
	Apply Close	

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

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
II Manage/Select Ce	refleations				
PRD Scope Statemen Steam Personnel	e Choose Scopes			Ş	
Person					
Isabel Gomes Value New York, NY United States	e.		PRD Choose Scopes ManagerSelect CartIficat	tons.	
Angel Martin Q1 New York, N United States	ć		PRD Choose Scopes Manage/Select Certificat	lena .	Т
+ Personnel					+
				Previous	Save Next

- 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).

Scopes	×
ltem	Certification
	Nitrogen - Nitrogen
	Steam
	Air
	Water
	Liquids - Liquids
	Natural Gas - Natural Gas
1	
	Apply Close

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

Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Certific	ations				
PRD PRD-67 Scope Statement Ch Nitrogen - Nitrogen ersonnel					
Person					
Jane Doe D New York, NY United States			PRD Choose Scopes Steam - Steam Manage/Select Certifica	tions	
Dohn Smith C New York, NY United States			PRD Choose Scopes Air - Air Manage/Select Certifica		
			Manage/Select Certifica	tions	

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

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Program Type					
				Previous	Save Next

- **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.

tails Finance					(
\bigcirc	\bigcirc	\bigcirc			
Policies	Certifications	Stamps	Travel	Billing	Review
vel Recommen	dation				
ocation Name				Status	
SME CA Connect Trail Park Avenue 오 🖸	ning Company			Not Complete	
ew York, NY 10016					
nited States					
dd New Location					
				Previou	s Next

- **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.

Country City United States Zip/ State Zip/ New York Pho City Pho New York Image: Comparison of the system of the syst	* Country *
Division Name Name ASME CA Connect Training Company Image: Company Address Line 1 Add Z Park Avenue Image: Company Address Line 2 Cou Image: Country Image: Country United States Image: Country State Zip/ New York Image: Country City Pho New York Image: Country Zip/Postal Code Image: Country You for the Country Image: Country Xirport Em	* Country *
ASME CA Connect Training Company Address Line 1 2 Park Avenue Address Line 2 Country United States State State City New York City City City City City City City City	* Country *
Address Line 1 2 Park Avenue Address Line 2 Country Cuntred States State State City New York City City City City City City City City	* Country •
2 Park Avenue Cou Address Line 2 Cou Country City United States Zip/ State Zip/ New York Image: City Notified States Image: City New York Image: City New York Image: City New York Image: City New York Image: City Nitroff Image: City Address Image: City Notified States Image: City Notified States Image: City Natified States Image:	* Country •
Address Line 2 Cou Address Line 2 Cou Se Country City New York City City New York City New York City City New York City City City New York City City City New York City Ci	Country •
Secontry City United States Zip/ State Zip/ New York Pho City Pho New York I Zip/Postal Code Fax 10016 Fax Nille I Nille I Striport Em	Country •
Country City City Pho New York City Pho State Zip/ New York City Pho New York City Pho New York City Pho State Code City Mile City City City City City City City City	al Code
United States State Zip/ New York City Pho New York Zip/Postal Code T0016 Fax inport Em	
State Zip/ New York Zip/ City Pho New York Zip/Postal Code 10016 Fax introprt Em	
New York City Pho Xey York Zip/Postal Code T0016 Fax irport Em	
City Pho New York I Zip/Postal Code Fax 10016 Fax irport Em	
New York Zip/Postal Code T0016 Fax inport Em	
irport Em	
10016 Fax + Mile sirport Em	ext.
irport Em	
sirport Em	1 / 1
sirport Em	
	om hotel to site *
	gency Contact
une iver	
ity* Pho	
+	ext.
tiles from airport to hotel *	
nee nem en por ce nocel	
ransportation *	
Select Transportation	

- **44.** The United States Postal Service (USPS) address validation is systematically performed for domestic and Canada addresses only. You may choose the USPS Validated address that is displayed or uncheck the **Use Valid USPS Address** checkbox to use the address you entered.
- 45. When done, click Save to continue.

Please review the addresses below.	
Hotel	
USPS Validated	You Entered
2 Park Ave	2 Park Avenue 오 🗅
New York, NY 10016	new york, NY 10013
United States	United States
Use Valid USPS Address	Save Cancel
	Save

- **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.

etails Finance					(
\bigcirc	\bigcirc	\bigcirc			
Policies	Certifications	Stamps	Travel	Billing	Review
avel Recomment	dation			Status	
SME CA Connect Train	ning Company			Complete	-
2 Park Avenue 💡 🖸					
New York, NY 10016					
United States					
Add New Location					•
				Previo	us Next
T					

- **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.

					0
\bigcirc	\bigcirc	\bigcirc	\bigcirc		
Policies	Certifications	Stamps	Travel	Billing	Review
Billing					
-	r cost associated with the revie	w/survey. Any left over rem	ittance will be refunded.		
Billing Address		Company B	anking Details ┥	-	
Use Plant Address Use	Mailing Address	Please provide	the following information to	allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ing Details		
Address Line 1					
Address Line 2		Bank Account I	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
ountry		Billing Contact	Email		
Select Country					
City		Account Numb	er / IBAN #		
Cip/Postal Code		SWIFT Code / B	IC		
Contact/Attention		Bank Transit N	umber		
hone Number		Tax ID Number			
·	ext.				
		Credit Card Pro	cessing Form		
			ard Processing Form 🗲	_	

- **54.** The **Billing** tab is updated to reflect a green checkmark. Your application process will advance to the **Review tab**.
- **55.** The **Review tab** displays a summary of the information that was entered in each of the tabs.
- 56. Click the **View More** link to display additional information on availability dates.
- 57. Enter the **Earliest Date** that your company will be available for the review. Please note that dates you enter must be a minimum of three months in the future.
- **58.** Select the **Add Dates** link to enter your unavailable **Start Date** and **End Date**. Please note that dates you enter must be a minimum of three months in the future.

Details	Finance				0
Poli	cies Certifications	Stamps	Travel	Billing	Review
Please confirm availability dates ASME Reviews/Survey are generally scheduled three to four months in advance. When considering the timeframe for scheduling your ASME Review/Survey, make sure the date ranges you provide allow for your Review/Survey to be scheduled a minimum 10 weeks (2.5 month) prior to your certificate expiration. View More					
Earliest Dat			Dates Unavailable Add D	ates	
The date selected should be a minimum three months from today's date		Start Date	End Date		
					Remove
Sister Locat					

- **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.

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

- 62. Scroll down the tab and select the **Download Agreement Form** link. The form will be downloaded and saved to your local computer.
- **63.** Locate the file and complete, sign, and save the completed Agreement Form on your local computer.
- 64. Select the Upload Agreement Form link.
- 65. Locate the signed agreement form on your local computer and upload the file.
 - a. If necessary can remove the form. However, uploading a completed and sign Agreement Form is required.
- 66. Click Save to continue.

Banking Details	Billing Address
Bank Name:	1 Park Ave 🗣 🖸
ABA Routing Number: Account Number/IBAN #: Swift Code: Bank Transit Number: Bank Account Name:	New York, NY 10016 United States
Tax ID Number: Contact/Attention Name: Contxxx Contact/Attention Email:	
	Form hen save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it. puter. Finally, upload the scanned document via the upload box located below the "Print
Download Agreement Form	. No other forms should be submitted via this upload box.
Download Agreement Form Jpload Agreement Form	Previous Save

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

			Ļ
	Previous	Save	Submit

- **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.

Details Finance	Print Document
Application Details Application ID: FAB-130263	T

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.

AS	ME								Ļo MT
Home	Profile	Processes	Applications	Certifications	Docume	ents Emails	New Company		
(i)		igned to more t o select a diffe	han 1 Company. ent Company			CHANGE REQ	UESTS +	pany	
	QSC Use	r Guide1 Co	mpany ^{Edit}	Actions		Applications			
	109847 New York, New York United States		New Application		Туре		Status	Activities	
Primary C Myrnates myrnaasr		om		New Change Request New Company		Application: FAB Type: QSC	-130235	Submitted Submitted: 06/17/2019	0
Certific	ations								
Certificat	tion Type	Status	E	ffective	Expires				
MO - QSC	C-854	Active	06/1	19/2019	06/24/2019				

- b. If you are associated with multiple companies, you will first be directed to a list of your companies.
 - 1) Once you select the Company, you will be directed to the Company Dashboard.

Your Companies Please select an Company from the list below.			
Name	Company ID	Location	Website
ASME CA Connect Testing Company	111012	New York, New York United States	www.training.com
ASME CA Connect Training Company	111011	New York, New York United States	www.training.com

3. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.

Home Profile	Processes Applic	ations Certifica	ations Docume	ents Emails New Compan	У	
U	ned to more than 1 C select a different Cor			CHANGE REQUESTS	ur Company	
MyrnaQSC User (109847 New York, New York Unit Primary Contact Myrnatest Trolano myrnaasme7@gmail.con	ted States	New Ap	plication ange Request	Applications Type Application: FAB-130235 Type: QSC	Status Submitted Submitted: 06/17/2019	Activities
Certifications						
Certification Type	Status	Effective	Expires			
MO - QSC-854	Active	06/19/2019	06/24/2019			

- **4.** The Applications tab will open so that you can begin create a new application for the renewal certification process.
- 5. The default and first Application tab is the **Policies** tab. Review all information displayed on the tab.
- 6. Scroll down the page to the Extension Policy section.
- 7. If you want to see the policy on Request for Extension, select the **General Downloads** link. You will be directed to the **ASME.org Downloadable Resources** page.
 - a. After reviewing the **Downloadable Resources**, close the page and return to the **Policies Tab**.
- 8. Check the I have reviewed and agreed to the above policies box.
- 9. Click **Next** to continue.

ASME				Ļı Js
Home Profile Processes Applications	Certifications Docu	ments Emails New (Company	
ASME CA Connect Training Company 111011 New York, NY www.training.com	Primary Contact Jane Smith Jsmith@training.com +1 (212) 5911111			
Activities		Processes		
0 No activities scheduled There are no activities scheduled for this applie	ation at this time.	U	ication Process	this application.
Details Finance				0
Policies Certifications	Stamps	Travel	Billing	Review
Final Invoice For reviews/Surveys conducted by ASME, a final invoice certificates and stamps cannot be issued until the invoi		in the fees and expenses of the	e ASME Designee. If there is a l	balance due to ASME,
Cancellation - Reviews/Surveys schedu				
Cancellation of review/survey dates scheduled by ASM • \$2,000 for cancellation after acceptance of revie • \$3,500 for cancellation within 2 months of revie • \$6,000 for cancellation within 1 months of review	w/survey dates. w/survey dates.	alty, deducted from the advance	ced deposit in the following sci	hedule:
Extension Policy				
In order to be eligible for an extension of the expiration received not later than six (6) months prior to the expir		he renewal application and all	applicable fees, including advi	ance payments, must be
This will ensure that the renewal process will be compleavilable dates more than nine (9) weeks prior to the en-				lolder must indicate
If ASME cannot schedule the review/survey on the date	s included, then an extension	will be granted.		
Please see the Policy on Request for Extension under <mark>G</mark>	eneral Downloads for more ir	formation.		
I have reviewed and agreed to the above policies.	1			
Т				Next

- 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.

Details Finance					
	\bigcirc				
Policies	Certifications	Stamps	Travel	Billing	Review
es					
here are no additional s	ites or addresses related to this a	application (at this time)			
Site + Address					

- The Certificate Types form is displayed containing the MO-Material Organizations certificate type. Select the Certificate Type for the certificate(s) you are renewing.
 When done, click Apply to continue.

Item Certification Image: MO - Material Organizations Image: MO (Additional 1) Material Organizations Image: MO (Additional 2) Material Organizations	Certifica	ate Types
MO (Additional 1) Material Organizations	ltem	Certification
D NO (Additional 2) Material Organizations		MO - Material Organizations
		MO (Additional 1) Material Organizations-
	-	MO (Additional 2) Material Organizations

15. The Certificate Type and Certificate Number you are renewing will be added to the Certifications Tab.

Details Finance					0
\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
MO QSC-854	tions				
Scope Statement					
Sites					
There are no additional sit	tes or addresses related to this a	opplication (at this time)			
+ Site + Address					1
				Previous	ave Next

- 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.

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Program Type					
QSC					
Upload Supplemen	ital Form				
Instructions: Please click	the "Download Supplemental Fo	orm" button, then save it to y	our computer as a pdf file. Ne	ext, open the form, fill it out, a	nd save the completed
form to your computer as	s a pdf file.				
Please upload the comple	eted form via the "Upload Supple	mental Form" button located	d below the "Download Supple	emental Form" button.	
Download Suppleme	ental Form				
1 Upload Supplementa	al Form (PDF)				
	<u>a</u>				1
				1	

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.

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
Travel Recommen	dation				
Location Name				Status	
ASME CA Connect Train 2 Park Avenue 🕈 🖸 New York, NY 10016 United States	ning Company			Not Complete	
Add New Location					
				Previou	IS Next

- 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.

Travel Recommendation Detail 🔫——	
* Indicates required fields	
Location Details	Hotel 💿
Division Name	Name *
ASME CA Connect Training Company	
Address Line 1	Address *
2 Park Avenue	
Address Line 2	Country *
	Select Country
Country	City *
United States	
State	Zip/Postal Code
New York	
City	Phone *
New York	ext.
Zip/Postal Code	
10016	Fax
	Miles from hotel to site *
irport	Emergency Contact
ame *	Name *
ry *	Phone *
	+ ext.
iles from airport to hotel *	
ansportation *	
Select Transportation	*

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.

1

35. When done, click Save to continue.

You Entered
2 Park Avenue 💡 🗅
new york, NY 10013
United States
Save Cancel

- **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.

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
ravel Recommend	dation				
Location Name				Status	
ASME CA Connect Train	ning Company			Complete	- 11 C
2 Park Avenue 오 🗅					
New York, NY 10016					
United States					1
Add New Location					•
A				Previo	us Next
				Previo	Next

- **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.

\bigcirc	\bigcirc	\bigcirc	\bigcirc		
Policies	Certifications	Stamps	Travel	Billing	Review
Billing					
	r cost associated with the revie	w/survey. Any left over rem	ittance will be refunded.		
Billing Address		Company B	anking Details ┥	-	
Use Plant Address Use	Mailing Address		the following information to	allow ASME to	
		refund any left	over remittance.		
Address Line 1		Company Bank	ting Details		
Address Line 1					
Address Line 2		Bank Account	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3		[li l		
Country		Billing Contact	Email		
Select Country					
City		Account Numb	er / IBAN #		
Zip/Postal Code		SWIFT Code / B	IC		
Contact/Attention		Bank Transit N	umber		
Phone Number		Tax ID Number	e		
	ext.				
		cultion to			
		Credit Card Pro	ard Processing Form	-	1

- **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.

Details	Finance				0
Poli	cies Certifications	Stamps	Travel	Billing	Review
ASME Review	onfirm availability dates ws/Survey are generally scheduled thre he date ranges you provide allow for yo		-		-
Earliest Dat			Dates Unavailable Add D	ates	
The date set	ected should be a minimum three mon	ths from today's date	Start Date	End Date	
					Remove
Sister Locat					

- **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.

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

- **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.

Banking Details	Billing Address
Bank Name:	1 Park Ave 💡 🔁
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	onice suces
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please upload your company manual	
Instructions: Upload your company manual via the	upload box below.
Please upload only your Company Manual. No other	forms should be submitted via this upload box.
1 Upload Company Manual	
Please print, sign and upload the Agreer	nent Form
Instructions: Please click the "Print Agreement" but	ton, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your	r computer. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement	Form. No other forms should be submitted via this upload box.
Download Agreement Form	
Upload Agreement Form	1
	Previous Save

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.

	Previous	Save	Submit

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.

Details Finance	Print Document
Application Details Application ID: FAB-130263	Î

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.

Home Profile Processes Applica	tions Cert	ifications Docur	ments Emails New Comp	any	
You are assigned to more than 1 Co Click here to select a different Con	1		CHANGE REQUESTS There are no change requests for ye	sur Company	
ASME CA Connect Training Company 199852 Jew York, New York United States Primary Contact Alymatest Troiano myrnaasme?@gmail.com	New C	s pplication hange Request ompany	Applications Type Application: FAB-130240 Type: NQA	Status Submitted Submitted: 06/18/2019	Activities
Certifications					
Certification Type Status	Effective	Expires			
NQA - NQA-128 Active	06/18/2019	06/18/2022			

- 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.

Your Companies Please select an Company from the list below.			
Name	Company ID	Location	Website
ASME CA Connect Testing Company	111012	New York, New York United States	www.training.com
ASME CA Connect Training Company	111011	New York, New York United States	www.training.com

3. Select the **Applications** tab found on the Company Dashboard menu bar or the **New Application** link that is in the **Actions** box.

Home Profile Processes Applications Certifications Docu	ments Emails New Company	(
 You are assigned to more than 1 Company. Click here to select a different Company 	CHANGE REQUESTS There are no change requests for you	r Company	
ASME CA Connect Training Company Edit Actions 109852 Vew York, New York United States	Applications Type	Status	Activities
rrimary Contact New Company Myrnatest Troiano nyrnaasme7@gmail.com	Application: FAB-130287 Type: NQA	Open	0
Certifications	Application: FAB-130240 Type: NQA	Submitted Submitted: 06/18/2019	0
Certification Type Status Effective Expires			
NQA - NQA-128 Active 06/18/2019 06/18/2022			

- 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.

Search	٩	A'Z ~		->0
Application	Туре	Status	Created	Submitted
FAB-130237	NQA	Submitted	06/17/2019	06/17/2019

- 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.

- 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.

ASME INTERIOR					Q e	JS
Home Profile Processes Applications Ce	rtifications Docur	nents	Emails	New Company		
111011 Jane New York, NY Jsm	nary Contact : Smith th@training.com 212) 5911111					
Activities		Proces	ses			
No activities scheduled There are no activities scheduled for this application a	at this time.	0		re Application Process ation processes have been started for this	application.	
Details Finance						0
Policies Certifications	Stamps		Travel	Billing	Review	
Final Invoice For reviews/Surveys conducted by ASME, a final invoice will be certificates and stamps cannot be issued until the invoice is pa		n the fees a	nd expense	es of the ASME Designee. If there is a bala	nce due to ASME,	
Cancellation - Reviews/Surveys scheduled b						
Cancellation of review/survey dates scheduled by ASME is sub		alty, deduct	ed from the	e advanced deposit in the following schedu	ile:	
 \$2,000 for cancellation after acceptance of review/surv \$3,500 for cancellation within 2 months of review/surv \$6,000 for cancellation within 1 months of review/surv 	ey dates.					
Extension Policy						
In order to be eligible for an extension of the expiration date s received not later than six (6) months prior to the expiration d		he renewal	application	and all applicable fees, including advance	e payments, must	be
This will ensure that the renewal process will be completed pr					er must indicate	
available dates more than nine (9) weeks prior to the expiration				Scheduling Information Form.		
If ASME cannot schedule the review/survey on the dates inclu			ted.			
Please see the Policy on Request for Extension under General	Downloads for more in	tormation.				
				-	Next	

- **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.

Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Cert	ifications				
	ifications				
es 🕇	ifications al sites or addresses related	to this application (at th	is time)		

- The Certificate Types form is displayed. Select the RTP Certificate Type.
 When done, click **Apply** to continue.

Certifica	ite Types X
ltem	Certification
	RTP - Reinforced Plastic Pressure
1	
	Apply Close

- **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.

Details Finance					0
\bigcirc					
Policies	Certifications	Stamps	Travel	Billing	Review
Manage/Select Cert	ifications				
RTP RTP-128					
Scope Statement					
Sites			No. at Landa 11		
	al sites or addresses related	to this application (at th	is time)		
+ Site + Address					+
				Previous Sav	e Next

- **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.

Details Finance					0
Policies	Certifications	Stamps	Travel	Billing	Review
to your computer as a pd	t the "Download Supplemental For If file. eted form via the "Upload Supplem				I save the completed form
± Upload Supplementa	al Form (PDF)				Ļ
				Previous	Save Next

- 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.

Policies	Certifications	Stamps	Travel	Billing	Review
avel Recommen	dation				
ocation Name				Status	
SME CA Connect Trai	ning Company 🚽			Not Complete	
2 Park Avenue የ 🗅 New York, NY 10016					

- 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.

Indicates required fields	
ocation Details	Hotel 🖤
Division Name	Name *
ASME CA Connect Training Company	
ddress Line 1	Address *
2 Park Avenue	
ddress Line 2	Country *
	Select Country
Country	City *
United States	
tate	Zip/Postal Code
New York	
City	Phone *
New York	ext.
Zip/Postal Code	
10016	Fax
	*
	Miles from hotel to site *
irport	Emergency Contact
ime *	Name*
	Name
ty *	Phone *
y	+ ext.
les from airport to hotel *	
ies iron arport to noter *	
ansportation *	

- **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.

Please review the addresses below.						
Hotel						
USPS Validated	You Entered					
2 Park Ave	2 Park Avenue 오 🗅					
New York, NY 10016	new york, NY 10013					
United States	United States					
Use Valid USPS Address	Save Cancel					
	Save					

- **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.

etails Finance					
\bigcirc	\bigcirc	\bigcirc		•	
Policies	Certifications	Stamps	Travel	Billing	Review
avel Recommend	dation				
Location Name				Status	
ASME CA Connect Train	ning Company			Complete	• 1
2 Park Avenue 오 🗅					
New York, NY 10016					
United States					
Add New Location					+
A				Previo	us Next

- **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.

					0
\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	
Policies	Certifications	Stamps	Travel	Billing	Review
Billing					
-	cost associated with the revie	w/survey. Any left over rem	ittance will be refunded.		
Billing Address		Company B	anking Details 🚄	-	
Use Plant Address Use	Mailing Address		the following information to	allow ASME to	
		refund any left	over remittance.		
ddress Line 1		Company Bank	ing Details		
Address Line 1					
Address Line 2		Bank Account	Name / Beneficiary		
Address Line 2					
Address Line 3		ABA Routing N	umber		
Address Line 3					
Country		Billing Contact	Email		
Select Country					
lity		Account Numb	er / IBAN #		
ip/Postal Code		SWIFT Code / B	IC		
Contact/Attention		Bank Transit N	umber		
hone Number		Tax ID Number			
	ext.				
		Credit Card Pro	cessing Form		
			ard Processing Form	_	1

- **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.

Details	Finance					0
Poli	cies	Certifications	Stamps	Travel	Billing	Review
ASME Review make sure t View More	he date ranges you	erally scheduled three t		cheduled a minimum 10 we	imeframe for scheduling your eks (2.5 month) prior to your	-
Earliest Dat	-		a fuana ta day és data	Dates Unavailable Add [
	ected should be a	minimum three month	is from today's date	Start Date	End Date	
						Remove
Sister Locat						

- **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.

Travel edit			
Division Information	Hotel Information	Airport Information	Emergency Contact
1 Park Ave 💡 🗅	Marriott	JFK	Marc Anthony
New York, NY 10016	475 Park Avenue 💡 🗅	Queens	Phone: +1 (212) 5911234
United States	New York, NY 10016	Miles From Airport To Hotel: 1	10
	United States		
	Miles from Hotel to Site: 10		
	Phone: +1 (212) 2021234		
Billing edit 🗲 🗕			
	- Pro mus a 17		
Credit Card Processing I	Form Form		

- **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.

Banking Details	Billing Address
Bank Name:	1 Park Ave 💡 🗅
ABA Routing Number:	New York, NY 10016
Account Number/IBAN #:	United States
Swift Code:	
Bank Transit Number:	
Bank Account Name:	
Tax ID Number:	
Contact/Attention Name: Contxxx	
Contact/Attention Email:	
Please upload your company manual	
Instructions: Upload your company manual via the upl	oad box below.
Please upload only your Company Manual. No other for	rms should be submitted via this upload box.
1 Upload Company Manual	
Please print, sign and upload the Agreeme	nt Form
Instructions: Please click the "Print Agreement" button	, then save it to your computer as a pdf file. Next, open the form, print out a hard copy, and sign it.
Scan the signed form and save it as a pdf file on your co	mputer. Finally, upload the scanned document via the upload box located below the "Print
Agreement" button.	
Please upload only your completed Print Agreement Fo	rm. No other forms should be submitted via this upload box.
Cownload Agreement Form	
Upload Agreement Form	T
	Previous Save

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.

Details	Finance	Print Document
	ion Details ID: FAB-130263	1

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.

Home Profile I	Processes Applications	Certificatio	ins Docur	nents Emails New Comp	any	
You are assigned to more than 1 Company. Click here to select a different Company				CHANGE REQUESTS		
MyrnaBPV UserGuide Company1 Edit 109829 New York, New York United States www.abc.com Primary Contact Myrnatest Trolano myrnaasme7@gmail.com				Applications Type Application: FAB-130263 Type: Boller Application: FAB-130218 Type: Boller	Status Submitted Submitted Submitted Submitted Submitted	Activities
Certifications						
Certification Type	Status Ef	fective	Expires			
A - 57797 A-1 - Assembly of power bollers at field sites controlled by the above location	Active 06/1	8/2019	07/02/2019			
A	Pending					

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.

Home Profile Processes Appli	cations Certifications Doci	uments Emails	New Company	
MyrnaBPE UserGuide1 Company 109850 New York, NY	Primary Contact Myrnatest Troiano myrnaasme7@gmail.com			
Activities		Processes		
0 No activities scheduled There are no activities scheduled for t	his application at this time.	U	e Application Process ation processes have been sta	arted for this application.
Details Finance				0
Orders	Order Detail			
Application Process	Application Process			
FAB130238 06/18/2019 Proforma Amount \$16,000.00 Balance Due \$16,000.00	Order Number GFI Date FAB130238	e Created 06/18/2	· · · · ·	e Download Invoice
+10,0000	Proforma Amount Amount \$16,000.00 \$0.00	Received Balance		1
	Final Invoice Number			
	* Final Invoices will include sa	les tax and shipping ch	narges where applicable	

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).

Scheduled Items		
Item	Begin	End
Onsite Visit	Apr 17th	
Onsite Visit	May 13th	May 17th 13 days ago
Onsite Visit	Apr 15th	

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.

Home Profile Processes Applications Certifications Documents Emails	New Company		
You are assigned to more than 1 Company. Click here to select a different Company	Select process	Application	
ASME CA Connect Training Company Edit 11101 New York, New York United States www.training.com Primary Contact	Select process Create Cancel Change Request: Company Name Chan In Progress on 06/12/2019	(optional)	50%
Jane Smith Jsmith@training.com +1 (212) 5911111	Applications		
Certifications O Certifications	Type Application: FAB-131534 Type: Boiler	Status Open	Activities
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
 - <u>Cancellation</u>
 - <u>Company Location Change</u>
 - Company Name and Location Change
 - <u>Company Name Change</u>
 - <u>Contact Change</u>
 - Extension Request
 - Financial Information Change
 - Other Change Request
 - Postal Re-Designation Change
 - Scope Change
 - <u>Temporary Shop Request</u>

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.

0	CHANGE REQUESTS	I
	Select process	Application
	Select process 🔻	(optional)
	Select process	
	Additional Building	←-
	Additional Stamps	
	AIA Change	
	Cancellation	
	Company Location Change	

CHANGE REQUESTS +	
Select process	Application
Additional Building	(optional)
Create	

atus	Item	Assignee	0	Change Request Deta	I
٢	 Submission Data 			Overview Comments	
٥	Change Request Detail	-	1	Due by 07/14/2019	
				Please submit all requested info	rmation.
				ltem	Form
				Additional Building	• Create Form

- 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.

Form							
nstructio	ons						Effective Date for requested changes
В	I	U	5	x ₂	x ²	T! -	
	≔	00					
Instruc		icate nu	mbers				
							-
							Save Cance

- **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.

Sub	mission and Initial Review			
Status	ltem	Assignee	\$	Change Request Detail
٢	Y Submission Data			Overview Comments
٥	Change Request Detail	22	1	+ Comment
				Save Cancel

- **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.

Status	Item	Assignee	0	Change Request Detail	1
۲	~ Submission Data			Overview Comments	
0	Change Request Detail		1	Due by 07/14/2019 🥥	
				Please ubmit all requested infor	mation.
				ltem	Form
				Additional Building	Instructions 06/14/2019 03:58:40 pm Remove
				In Progress	
				I Mark as "Not Started"	
				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.

elect process	Application	
Select process	(optional)	
Select process		
Additional Building		
Additional Stamps		

elect process	Application	
Additional Stamps	▼ (optional)	

atus	Item	Assignee	٢	Change Request Detail	
٥	~ Submission Data			Overview Comments	
٥	Change Request Detail	17-1 1	1	Due by 07/14/2019	
				Please submit all requested informa	tion.
				Item	Form
				Additional Stamps - Required	O Create Form

- 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 $\frac{3}{4}$ " and $\frac{1}{2}$ " 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.

Please specify the quantity of 1/2" stamps requested:
0
Delivery Address
B I U $-S$ x_2 x^2 $Tl -$
!≡ % ™
Start Typing
AcknowledgementStatement
B I U $-S$ x_2 x^2 $Tl -$
≣ ≔ % ⊠
I understand and acknowledge that the company

- **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.

Sub	mission and Initial Review			
Status	ltem	Assignee	6	Change Request Detail
۲	Y Submission Data			Overview Comments
٥	Change Request Detail	22	1	+ Comment
				Save Cancel

- **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.

Sub	Mission and Initial Review				
Status	ltem	Assignee	0	Change Request Detail	
٥	~ Submission Data			Overview Comments	
۲	Change Request Detail		1	Due by 07/14/2019 🥥	
				Please submit all requested informa	ation.
				Item	Form
				Additional Stamps - Required	Please provide the requested information. 06/15/2019 09:31:03 am Remove
				In Progress	
				Mark as "Not Started"	
				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**.

🔅 CHANGE REQUESTS 🛛 🛨	•	
Select process	Application	
Select process	(optional)	
Select process	N N	
Additional Building		
c Additional Stamps		
II AIA Change		0%

4. Click Create.

CHANGE REQUESTS +	
Select process	Application
AIA Change	 (optional)

atus	Item	Assignee	0	Change Request Detail	
٢	~ Submission Data			Overview Comments	
۲	Change Request Detail	(Tr)	0	Due by 07/14/2019 🖉	
				Please submit all requested information	on.
				ltem	Form
				AIA Change Form - Required	• Create Form

- 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.

Form	×
Name of New AIA	Effective date of requested changes
T	T
	Ē
	Save Cancel

- 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.

Sub	Mission and Initial Review			
Status	ltem	Assignee	0	Change Request Detail
٥	Y Submission Data			Overview Comments
Ø	Change Request Detail		/	+ Comment
			-	Save Cancel

- **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.

Status	Item	Assignee	0	Change Request Deta	ail
0	 Submission Data 			Overview Comments	
۲	Change Request Detail		1	Due by 07/15/2019	
				Please complete the form via th	e link.
				ltem	Form
				AIA Change Form - Required	••• New Name 06/15/2019 09:53:24 am Remove
				In Progress	
				Mark as "Not Started"	
			-	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.

CHANGE REQUESTS +	-		
Select process		Application	
Select process	•	(optional)	
Select process			
Additional Building			
Additional Stamps			
AIA Change			0%
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.

Sub	mission and Initial Review					
Status	Item	Assignee	0	Change Request Detail		
٥	 Submission Data 			Overview Comments		
٥	Change Request Detail	-	1	Due by 07/15/2019		
				Please submit all requested inform	nation.	
				Item	Form	
				Cancellation Submission Form -	• Create Form	

- 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.

Are you requesting that the scheduled review be rescheduled to a later date, or simply cancelled?	Postponement: Requested Start Date
Postponement: Requested End Date	Start Date of Currently Scheduled Review
Please describe the reason for cancellation or postponement. $\begin{array}{c ccccccccccccccccccccccccccccccccccc$	I acknowledge that cancellation or postponement will result in a charge of a cancellation fee, per the ASME policies below. Yes No Yes No
Please review the policies at the links below. NEED L	

- 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.

Data			
botta			Overview Comments
equest Detail	-	1	+ Comment
	equest Detail	equest Detail	equest Detail 🦉

- **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**.

Select process	Application	
Select process	(optional)	
Select process		
Additional Building		
Additional Stamps		
AIA Change		
Cancellation		
Company Location Change	-	
Company Name and Location Ch	ange	

4. Click Create.

elect process		Application	
Company Location Change	*	(optional)	

Sub	mission and Initial Review				
Status	Item	Assignee	0	Change Request Deta	il
٥	 Submission Data 			Overview Comments	
٢	Change Request Detail	-	1	Due by 07/15/2019	
			2	Please complete the form via the	e link.
				Item	Form
				Company Location Change - Required	• Create Form
				In Progress	

- 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.

Form	\$
ffective Date of Requested Change	New Address
	$B I \underline{U} \stackrel{\mathfrak{S}}{\to} x_2 x^2 T! \checkmark$
	i≡ ≔ % 🖬
	Start Typing
Distance from old address (in miles)	
0.0	

- 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.

Sub	mission and Initial Review			
Status	ltem	Assignee	S	Change Request Detail
۲	Y Submission Data			Overview Comments
٥	Change Request Detail	-	1	+ Comment
			_	
				A
				Save Cancel

- **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.

Sub	mission and Initial Review				
Status	Item	Assignee	0	Change Request Deta	il
٥	 Submission Data 			Overview Comments	
۲	Change Request Detail		1	Due by 07/15/2019	
				Please complete the form via the	e link.
				ltem	Form
				Company Location Change - Required	2019-06-17 06/15/2019 10:24:38 am Remove
				In Progress	
				I Mark as "Not Started"	
			-	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**.

🔅 CHANGE REQUESTS 🛨 🗲	
Select process	Application
Select process	(optional)
Select process	
Additional Building	
Additional Stamps	
AIA Change	\sim
Cancellation	
Company Location Change	()
Company Name and Location Change	←
Company Name Change	

elect process	Application	
Company Name and Location Change	(optional)	

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.

tatus	Item	Assignee	0	Change Request D	etail
0	Y Submission Data			Overview Comments	
٥	Change Request Detail		1	Due by 07/15/2019	
				Please complete the form via	a the link.
				ltem	Form
				Company Name and Location Change - Required	• Create Form

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.

Form	×
Effective Date of Requested Change	Name Change Policy
	Please review the ASME Name Change Policy, availab
New Legal Company Name	New Address
-	$B I \underline{U} \stackrel{\mathfrak{S}}{\to} x_2 x^2 T! \bullet$
	Start Typing
Distance from old address (in miles)	
0	
	Save Cancel

- 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.

is Item	Assignee	0	Change Request Detail
Y Submission Data			Overview Comments
Change Request Detail		1	+ Comment

- **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.

Sub	mission and Initial Review	_				
Status	Item	Assignee	0	Change Request D	Detail	
٥	Y Submission Data			Overview Comments		
۲	Change Request Detail	775X	1	Due by 07/15/2019		
				Please complete the form via	a the link.	
				ltem	Form	
				Company Name and Location Change - Required	• Create Form	
				In Progress		

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**.

Application
(optional)
0%
0%
\sim

elect process	Application	
Company Name Change	(optional)	

Status	Item	Assignee	S	Change Request Det	ail	
۲	~ Submission Data			Overview Comments		
۲	Change Request Detail		1	Due by 07/15/2019		
				Please complete the form via t	ie link.	
				ltem	Form	
				Company Name Change -	Create Form	

- 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.

Form	×
Effective Date of Requested Change	Name Change Policy Please review the ASME Name Change Policy, availab
New Legal Company Name	
	Save Cancel

- 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.

Sub	mission and Initial Review			
Status	Item	Assignee	9	Change Request Detail
٥	Y Submission Data			Overview Comments
٥	Change Request Detail		1	+ Comment
				Save Cancel

- **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.

tatus	Item	Assignee	0	Change Request Deta	ail
0	 Submission Data 			Overview Comments	
0	Change Request Detail		1	Due by 07/15/2019	
				Please complete the form via th	ne link.
				Item	Form
				Company Name Change - Required	 2019-06-17 06/15/2019 10:45:01 am Remove
				In Progress	
				Mark as "Not Started"	
			-	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**.

0	CHANGE REQUESTS	
	Select process	Application
	Contact Change	(optional)
	Select process	
	Additional Building	
c	Additional Stamps	
h	AIA Change	
	Cancellation	
C	Company Location Change	
	Company Name and Location Change	
c	Company Name Change	
ļ	Contact Change	0%
	Extension Request	

4. Click Create.

Select process	 Application
Contact Change	(optional)

Sub	mission and Order Creation				
Status	Item	Assignee	S	Change Request Detai	1
۲	× Submission Data			Overview Comments	
۲	Change Request Detail	Change Request Detail			
				Please submit all requested infor	rmation.
				ltern	Form
				Contact Information Change - Required	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 	

- 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.

nstructions	Effective Date
Please provide the relevant information for the cont	
Master Customer ID (optional)	First and Last Name of Existing Contact
Does contact name need update?	Does contact email address need update?
Does a contact phone need update?	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

- 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.

Sub	mission and Initial Review			
Status	ltem	Assignee	0	Change Request Detail
٢	Y Submission Data			Overview Comments
٥	Change Request Detail		1	+ Comment
				Save Cancel

- **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.

Status	Item	Assignee	ø	Change Request Detai	1
۲	 Submission Data 			Overview Comments	
۲	Change Request Detail	-	1	Due b 07/15/2019	
				Please submit all requested infor	mation.
				Item	Form
				Contact Information Change - Required	Please provide the relevant information for the contact information which need updating. 06/15/2019 11:11:56 am Bemove
				In Progress	
				G Mark as "Not Started"	
			-	Complete	

Extension Request

If an extension is required for a certificate renewal or work in progress, select the Extension Request 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.
- 3. Scroll through change request list and select Extension Request.

Sel	lect process	Application
S	Select process	(optional)
5	Select process	
P	Additional Building	
F	Additional Stamps	
A	AIA Change	
C	Cancellation	
0	Company Location Change	
¢	Company Name and Location Change	
(Company Name Change	
C	Contact Change	
E	Extension Request	←
d	Extension Request	←

elect process		Application	
Extension Request	٣	(optional)	

Status	Item	Assignee	0	Change Request Deta	ii	
0	 Submission Data 			Overview Comments		
٥	Change Request Detail	124	1	Due by 07/15/2019		
				Please submit all requested info	mation.	
				ltem	Form	
				Extension Request - Required	• Create Form	

- 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.

Instruct	ions								
Do you	u intend	l to rene	ew the c	ertifica	tion for	the certi			
xtensio	on Type								
							←		
pplical	ble Certi	ificate N	umber(s	5)				tension date (for renewals)	
								n date of code activity (for W	IP
							non-renewal extension)?		
			I						
ate rene	ewal, wo	the reaso orks in p	rogress,	etc.). P	rovide s	nsion sufficient			
ate rene	ewal, wo	orks in p grantin	rogress,	etc.). P	rovide s	ufficient			
ate rene etail to	ewal, wo support	orks in p grantin	rogress, g of an e	etc.). P	rovide s on.	ufficient			
ate rene etail to B	ewal, wo support I I	orks in p grantin	rogress, g of an e ु	etc.). P	rovide s on.	ufficient			
ate rene etail to B	ewal, wo support I I	orks in p grantin	rogress, g of an e ु	etc.). P	rovide s on.	ufficient			

- 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.

atus	ltem	Assignee	\$	Change Request Detail
٥	 Submission Data 			Overview Comments
٢	Change Request Detail	-	1	+ Comment
			_	

- **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.

tatus Item	Assignee	0	Change Request Deta	il
Submission Data			Overview Comments	
Change Request Detail		1	Due by 07/15/2019	
			Please complete the form via the	e link.
			ltem	Form
			Company Location Change - Required	 2019-06-17 06/15/2019 10:24:38 am Remove
			In Progress	
			Mark as "Not Started"	
		-	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.

0	CHANGE REQUESTS + 🗲	
S	elect process	Application
	Select process	(optional)
	Select process	
	Additional Building	•
c	Additional Stamps	
h	AIA Change	
	Cancellation	
C	Company Location Change	
10	Company Name and Location Change	
d	Company Name Change	
h	Contact Change	
	Extension Request	
C	Financial Information Change	—
1		

4. Click Create.

elect process	Application	
Financial Information Change	(optional)	

Status	Item	Assignee	0	Change Request Detai	
٥	 Submission Data 			Overview Comments	
٢	Change Request Detail		1	Due by 07/15/2019	
				Please submit all requested infor	mation.
				Item	Form
				Finance Information Change -	• Create Form

- 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.

Form	×
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) $B I \underline{U} + x_2 x^2 T^{\dagger} \cdot \cdot$
	Start Typing
	Save Cancel

- 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.

Sub	mission and Initial Review			
Status	ltem	Assignee	\$	Change Request Detail
۲	Y Submission Data			Overview Comments
۲	Change Request Detail		1	+ Comment
				Save Cancel

- **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.

tatus	ltem	Assignee	Ø	Change Request Detai	1
٥	 Submission Data 			Overview Comments	
۲	Change Request Detail	-	1	Due by 07/15/2019	
				Please submit all requested infor	mation.
				Item	Form
				Finance Information Change -	2019-06-17 06/15/2019 12:15:14 pm Remove
				In Progress	
				Mark as "Not Started"	
				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.

Select process	Application	
Other Change Request	(optional)	
Select process		
Additional Building		
Additional Stamps		
AIA Change		
Cancellation		
Company Location Change		
Company Name and Location Cl	hange	
Company Name Change		
Contact Change		
Extension Request		
Financial Information Change		

elect process	Application	
Other Change Request	 (optional) 	

tatus	ltem	Assignee	0	Change Request Detail	
۲	~ Submission Data			Overview Comments	
۲	Change Request Detail	H	1	Due by 07/15/2019	
				Please submit all requested inform	nation.
				Item	Form
				Other Change Request - Required	• Create Form

- 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.

Form								
ffective	Date of	Request	ed Chai	nge			Application and/or Certificate Number(s)	
		our req				etail to		
B ≡	<i>I</i> :≡	U ₽	-S-	×2	x²	TI •		
Start T	yping 🖣	-	8					
							Save	Cance

- 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.

Submission and Initial Review			
Status Item	Assignee	6	Change Request Detail
Submission Data			Overview Comments
O Change Request Detail		1	+ Comment
			Save Cancel

- **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.

atus	ltem	Assignee	0	Change Request Detail			
٢	 Submission Data 			Overview Comments			
٥	Change Request Detail		1	Due by 07/15/2019			
				Please submit all requested inform	nation.		
				Item	Form		
				Other Change Request - Required	 2019-06-17 06/15/2019 12:30:52 pm Remove 		
				In Progress			
				() Mark as "Not Started"			
			-	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**.

0	CHANGE REQUESTS 😛 🔶	
	Select process	Application
	Select process	(optional)
	Select process	
	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	←

Select process	Application
Postal Re-Designation Change	(optional)

tatus	Item	Assignee	ø	Change Request Detail	
۲	 Submission Data 			Overview Comments	
0	Change Request Detail	. in	/	Due by 07/15/2019	
				Please submit all requested inform	mation.
				Item	Form
				Postal Re-designation Change -	• Create Form

- 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.

Form							×
Effective Date of Requested Changes	New Add	ress I	U	S	x ₂	x²	TI▼
	}≡ Start Ty	i≡ ∕ping •	₀ ₀				
Confirmation statement that address change is postal change only, and location has not moved or changed	Reason fo	or Posta I	ll Chang	e S	X2	x ²	Ti •
🔍 Yes 🔍 No 🗲	ŧ	≔	00	1			
	Start T	/ping 🚽	•				
			-		Save		Cancel

- 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.

Sub	mission and Initial Review			
Status	Item	Assignee	6	Change Request Detail
۲	Y Submission Data			Overview Comments
٥	Change Request Detail	2	1	+ Comment
				Save Cancel

- **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.

itatus	ltem	Assignee	Ø	Change Request Detail	1
0	 Submission Data 			Overview Comments	
۲	Change Request Detail	2	1	Due b 07/15/2019	
				Please submit all requested infor	mation.
				ltem	Form
				Postal Re-designation Change . Required	2019-06-17 06/15/2019 12:48:29 pm Remove
				In Progress	
				G Mark as "Not Started"	
			_	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**.

\$ CHANGE REQUESTS	
Select process	Application
Select process 🔻	(optional)
Select process	
Additional Building	
Additional Stamps	in in in in it
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	←

Select process		Application	
Scope Change	•	(optional)	

tatus	Item	Assignee	0	Change Request De	tail	
0	Y Submission Data			Overview Comments		
0	Change Request Detail		1	Due by 07/15/2019		
				Please submit all requested in	formation.	
				Item	Form	
				Scope Change - Required	O Create Form	

- 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.

Form	
ffective Date of Required Changes	Certificate Type and Certificate Number(s)
cope(s) to be Removed	Scope(s) to be Added

- 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.

Subi	Mission and Initial Review			
Status	ltem	Assignee	\$	Change Request Detail
٢	Y Submission Data			Overview Comments
٥	Change Request Detail		1	+ Comment
			-	
				Save Cancel

- **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.

atus	Item	Assignee	0	Change Request De	tail
0	 Submission Data 			Overview Comments	
٥	Change Request Detail		1	Due by 07/15/2019	
				Please submit all requested in	formation.
				Item	Form
				Scope Change - Required	2019-06-16 06/15/2019 01:00:47 pm Remove
				In Progress	
				I Mark as "Not Started"]
			-	Complete	

Temporary Shop Request

If the use of a new location for a period of time is needed, select **Temporary Shop Request** change request.

- Click the Change Request blue (+) icon.
 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**.

Ø	CHANGE REQUESTS	
	Select process	Application
	Select process	(optional)
	Select process	
	Additional Building	
c	Additional Stamps	
h	AIA Change	
	Cancellation	
C	Company Location Change	
	Company Name and Location Change	
c	Company Name Change	
ĥ	Contact Change	
	Extension Request	
C	Financial Information Change	
Ľ	Other Change Request	
	Postal Re-Designation Change	
	Scope Change	
	Temporary Shop Request	←

Select process	Application	
Temporary Shop Request	(optional)	

Status	Item	Assignee	0	Change Request Deta	ail
۲	~ Submission Data			Overview Comments	
0	Change Request Detail		1	Due by 07/15/2019	
				Please submit all requested info	rmation.
				ltem	Form
				Temporary Shop Request -	• Create Form

- 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.

ective Date	of Reques	ted Chang	es		Certificate Type(s)
ertificate Nu	mber(s)				Distance from Current Shop (in miles)
ldress of Te	mporary Sh	пор			0.0
B I		5	x ₂ x	² TI▼	
¹ 3 = :	∎ %				
Start Typin	5				

- 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.

Sub	mission and Initial Review			
Status	ltem	Assignee	0	Change Request Detail
٢	Y Submission Data			Overview Comments
٥	Change Request Detail	=	1	+ Comment
				Save Cancel

- **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.

Status	Item						
	item	Assignee	0	Change Request Deta	il		
٢	 Submission Data 			Overview Comments			
٥	Change Request Detail		1	Due by 07/15/2019			
				Please submit all requested info	rmation.		
				Item	Form		
				Temporary Shop Request -	2019-06-17		
				Required	06/15/2019 01:17:38 pm Remove		
				In Progress			
				I Mark as "Not Started"			

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.

	e in your em		
Emai	ceed. I:		
_	Continue	-	
-		230	

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.

ompany Name	Country/Region		
	Choose a Country	•	
lity	Certificate Type		Status
	Choose a Certificate Type	۳	Active Suspended
			Withdrawn
			C Terminated
			Clear
Search Clear			

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.

Company Name test		Country/Region					
		Choose a Count	Choose a Country				
ity		Certificate Type			Status		
		Choose a Certifi	Choose a Certificate Type			Active Suspended	
					U With	drawn	
					U Tern	ninated	
Sea	irch Clear				Clear		
Sea	Clear Company Name	Plant Address	City	State/Prov	Print De	etails for Sele Regi ce rtificate	cted Ite
Sea		Plant Address 1561 Unionport Road	City Bronx	State/Prov	Print De		
	Company Name				Print De in@ountry/F United	Regi be rtificate	Status
•	Company Name Test BPV Company	1561 Unionport Road	Bronx	NY	Print De in œuntry/F United States United	Regi be rtificate 58082	Status Active

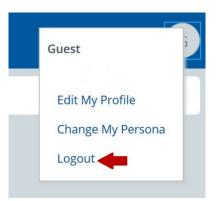
A PDF document, containing the Certificate Holder Details, will be downloaded to your local computer for you review and print.

255

CA Connect	ASME				
CERTIFICATE HOLDER DETAILS					
Certificate Type:	A				
Certificate Number:	58082				
Certificate Status:	Active				
Company Name:	Test BPV Company				
Legal Name:	Test Boiler Pressure Valve Company				
Division Name:	Testing				
Company Address:	1561 Unionport Road MC Bronx New York 10462 - United States				
Scope:	A-1 - Assembly of power boilers at field sites controlled by the above location				
Authorized Date:	06/26/2019				
Expiration Date:	11/09/2019				

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**. You will be redirected to the **Sign In** screen as proof of successful logout.



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 HolmesA@asme.org,