Recognized Provider Training Handbook

Introduction

The recognized provider program is a courtesy method for NATE to help the certified technician track their Continuing Education Hours (CEHs). This system does not remove the technician's responsibility for knowing their education hours, but is an additional aid to help track their hours.

Recognized Provider Criteria

To be a Recognized Provider a training organization (TO) must have registered with NATE and received their five digit TO number after completing the TO applications having supplied a password or personal identification number.

How to Get a TO Number

To register the training organization, download the Training Organization (TO) application from the NATE website at www.natex.org, Resource Center, Document Library. Complete the form per the instructions selecting the education box for the organization type. Fax or email the application to NATE.

The myNATE Login

NATE has created a universal log in for easier access to multiple data points. This login allows an individual to access their personal, proctor, testing organization, and training organization records all in one convenient spot.

Upon confirmation of acceptance as an NATE TO, create the myNATE login by doing the following:
- Go to www.natetesting.com
- Login as a TO with the TO Number and Password
- At the TO Home Page click the CEH Menu (Continuing Education Hours Menu)
- At the Training Organization-CEH Page follow the instructions for creating the myNATE login.

How to Have a Course Recognized

Face to Face Courses

To earn course recognition, the course content must be aligned to the technical content from the Job Task Analysis called the Knowledge Area of Technician Expertise (KATE). There is a KATE for each NATE exam. The course alignment is for each specialty.

To have a course approved, login to your myNATE page and follow these instructions:
- Click the Continuing Education box just under the NATE logo
- Click Add a New Course on the blue line

Fill in all the information requested. Provide a description and email address, these are critical for properly defining the course content and maintaining contact.

Scroll to the bottom and click the center box-CREATE COURSE

Review and update, the system allows for corrections and updating if necessary, then click-UPDATE COURSE if data has changed. If information was not changed go directly to lower right and click CONTINUE

The COURSE OUTLINE selection page will come on the screen. Select as many outlines as apply to your course. Remember training courses apply to many specialties and if the specialties are not selected and aligned during the recognition process, NATE will not be able to provide all of the hours for the technician that apply. Select all specialties depending on the course content.

An example of selecting would be an electric course covering all specialties but an oil burner course would only cover oil furnaces and hydronics. Remember the install and service categories will also need to be selected depending on the course content.

Select an outline, select the hours the outline will cover for the course. Each course can cover a different number of hours for a specialty.

Example: heat pump course covers 8 hours in total. But in that course there is specific instruction on duct design and sealing that only covers three hours. As you select the specialties the heat pump coverage would be 8 hours but you could also select air distribution and apply 3 hours to that specialty. The ability to allocate different hours per specialty in a single course allows certified technicians to accrue hours from one course over multiple specialties.

After selecting all of the outlines that the course will cover, click CONTINUE. Align the course content to the KATEs. The alignment shows how the course content matches the job and task requirements from the KATEs.

To create the alignment (also known as the CROSSWALK):

Scroll to bottom gray rectangle and the first outline in the list will be shown.
- Click Edit
- Click Expand

Go through the knowledge items and click the boxes that align (crosswalk) your content to the KATE.

If multiple specialties were selected make sure the "Update all matching outlines" box on the bottom of the page is checked before clicking on UPDATE.

Once all of the boxes are checked scroll to the bottom and click "Continue" on the lower right. Repeat this step for each outline that you selected.

After completing the last outline the Continue button will return you to the View All Details section. If all is correct, check to confirm and then submit the Course.

Your submission process is now completed. NATE will receive the data electronically. The course will be reviewed for completeness and specialty coverage. It will receive either:

Approval - An email will be sent showing the course is approved, the course number, and information on invoicing or the submission of your payment. If paying by credit card please login after receiving your Approval email, select the course, and click on the payment section for payment information.

Declined - An email will be sent stating why the course has been declined. Return to the myNATE log in and follow the instructions above to edit the course and re-submit.

Electronic, Online, Self Study, and Webinars

There are additional criteria for courses that are not conducted face to face. For education organizations conducting non-face to face courses you must:

Submit the course as described above.

Establish the hours for credit. Individuals differ and will complete course content faster or slower than another individual. Therefore it is the responsibility of the Recognized Provider to establish the time frame for the technician to receive credit hours.

Conduct an on line test for the technician at the end of the training that also collects the technicians NATE ID.

Submit the on line passing test grade, technician name and technician NATE ID to NATE electronically

How to Have Courses Revised or Renewed

Courses expire automatically after two (2) years and must be renewed. Login to myNATE and select the course to be renewed or revised. Follow the procedures above for selecting specialties, hours, and course content. Click the submit button and the recognition process will start. Once a course is revised or renewed the original course number is revised to show a revision number and the original course number is discontinued. (Example 1001-0001 Discontinued, 1001-0001 Rev. 1)

Note: As a courtesy, NATE sends an email alerting the Training Organization contact at 30 days and the day before a course expires.

How to Discontinue a Course

There will be instances where training organizations no longer wish to offer a course. Again login to myNATE, select the course and look for Discontinue Course in the top box. Click the words and then confirm-discontinue. The course will no longer be eligible for NATE to track the continuing education hours for the technicians. You will receive an email confirmation.

Viewing Recognized Courses

As a Recognized Provider

Courses can be viewed on either the myNATE login or directly from the NATE website.

A course does not have to be listed on the NATE website. Login to myNATE, select the course, and check list/unlist under the Web Status section of the Approved Course.

To view your courses on myNATE login as you would to add a course and review all of your courses. To view on the NATE website follow the instruction below for the technician

As a Technician

Go to www.natex.org, click Technicians and Certifications, click Recertification from the drop down menu, click Find NATE Recognized Courses for CEHs. Use the drop down menus to select the areas of training, technician type, training organization and then enter a zip code. The search can take up to two minutes to complete. The detailed list that is generated gives information on the course name and the course recognized specialties. Clicking the Course name generates the information on the training organization, their location, contact information and the course description.

The technician should always refer to this listing when selecting a course to be taken to make sure it is recognized for the technician's specialty. NATE cannot change the submittals (nor will the technician receive credit hours) if the recognized provider doesn't provide the information for their course to be recognized under all applicable specialties.

Fees for Course Recognition

Once a course is recognized or the course is renewed NATE will charge the recognized provider $95.00 for each course and the recognition lasts for two (2) years.
- Payment may be made by check following the receipt of an Invoice or by credit card when the course is approved.
- A course with invoices older than 60 days will be inactivated until payment is received.
- Please remember you are charged for the course not the number of KATEs the course covers.

How Continuing Education Hours are Recorded

Face to Face

For the technician to have NATE track their continuing education hours, the education provider must submit an original NATE Recognized Provider Attendance record within 60 days of the course date.

On the day of the class the training organization should download the appropriate attendance record from the NATE website. There are two different forms, one for single session classes and one for multiple session classes.

Technicians must print their name legibly, put their NATE ID (NO ID#, NO CEH CREDIT) number in the appropriate column and sign the form. The instructor has TWO ways of submitting the information to NATE.

1. Fill in the top portion completely, sign the bottom of the form and send the original to NATE.

OR

2. Log into myNATE. Click Courses; Highlight the course number that the class applies to. Scroll to the bottom and in the Classes section click Add New Class. Enter the information for the new class. Click Create Class. Review, update or correct any information, if necessary. Go to the bottom and click Continue. Add the technicians by inserting their NATE ID number in the box. If the correct technician does not appear you can delete the entry on the next screen. Once all technicians have been entered click continue. An electronic scanned copy of the attendance form must be attached to the myNATE system at this point. Follow the online instructions. Click Continue and then either submit or delete the class. NATE will review the scanned copy and the names entered and accept or reject.

60 hours teaching face to face classes can be used toward recertification credit for an instructors for each certification held.

Electronic, Online, Self Study, and Webinars

For the technician to have NATE track their continuing education hours under this category, NATE must receive electronic confirmation that the NATE candidate has taken and passed the prescribed test at the end of the course. The electronic confirmation must include:
- NATE Candidate name
- NATE Candidate ID
- NATE Recognized Provider Approved Course Number
- Grade received on the test
- Passing grade of the test.

Credits Not Received

The following are reasons for credits not being posted to a technicians account.
- Technician did not record their ID number
- Not using the correct NATE recognized Provider Attendance Record
- Not a Recognized Course
- Course has expired
- NATE Course name, number, credit hours and/or date are not on the Attendance Record
- Form is not legible
- Attendance Form is not received in 60 days after the class
- Technician did not sign the form
- NATE did not receive the original form (copies or faxes are not acceptable)
- For electronic submission, scanned copy was not attached to the record
- Submitted class does not match the scanned Attendance Record.

Credit for Other Courses

NATE only tracks CEHs for NATE Recognized Courses. The technician is solely responsible for maintaining any additional course information.

The candidate must receive a certification of attendance with their name, date of the course, name of the course, a description of the course and contact information for the course provider. The candidate must hold the certificate until applying for recertification.