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NATE Certification

To earn NATE Certification you must meet the exam criteria for each test specialty. The Knowledge Areas of Technician Expertise (KATE’s) are outlines of the information covered in each exam, www.natex.org, click on Technicians, What Tests to Take/KATES. They should be used as reference material while preparing for the NATE exams; they represent what knowledge, skills and abilities a Technician should have before testing.

NATE’s goal is to make exams readily available to technicians. Exams are offered year-round by approved NATE Testing Organizations. Testing organizations include manufacturers, wholesalers/distributors, educational facilities, utilities, associations and unions.

Core Exam

The core exams cover the following topics: Safety, Tools, Basic Construction, Using Basic Science, Achieving Desired Conditions, Taking Temperature and Humidity Measurements and Basic Electricity.

Specialty Exam

The specialty exams cover various topics; please refer to the KATE’s for the complete list.

NATE’s Specialty Exams

- Air Conditioning
- Air Distribution
- Air-to-Air Heat Pumps
- Gas Furnaces
- Oil Furnaces
- Hydronics Gas
- Hydronics Oil
- Light Commercial Refrigeration
- Commercial Refrigeration
- HVAC Efficiency Analyst (Senior Level)

Other Certifications

Ground Source Heat Pump (GSHP) this is a test and certification for Technicians in the GSHP industry. This certification does not require a Core exam.
Certification Types

Installation Technician

This technician primarily prepares the installation site (including removal of existing HVAC/R equipment), fabricates connections, and assembles systems as specified in the installation instructions. The technician must be able to properly power up and set control positions to cycle equipment through primary heating, cooling, and blower operation under on-site or off-site supervision of a service or senior technician. The installation technician takes specialized readings, such as temperatures, refrigerant circuit pressure, and basic electrical readings, with both operating and non-operating equipment, as may be required by others.

Service Technician

This technician must be able to accomplish the same tasks as an installation technician, as well as to independently power up and adjust control settings to cycle equipment through all designed-for sequences. A service technician must be able to acquire, evaluate, and interpret such readings as may be necessary to determine the adequacy and acceptability of system operation to meet specifications. This technician must be able to perform sufficient field diagnostic procedures as necessary to determine causes of inadequate performance and identify corrective actions as needed.

Note: Technicians earning the Heat Pump certification are automatically awarded Air Conditioning certification. Technicians earning Service certifications are automatically awarded Installation Certifications in the same specialty area.

Senior Technician

This technician must already have all of the skills of an Installation Technician and Service Technician especially high level diagnostic capabilities.

Eligibility for NATE Certification Exams

Anyone interested in obtaining NATE Certification may take the tests, provided they have contacted and made arrangements with the Testing Organization and pay the appropriate testing fees.

The NATE exams assess the candidates’ applied knowledge and experience, both are necessary to pass the stringent NATE exams. There are no formal educational requirements for certification, but NATE strongly suggests that examinees have some formal training.

The NATE Technical Committee oversees the Knowledge Areas of Technician Expertise (KATEs) and all test development. The KATEs are the statistically proven job task analysis from which all questions are developed. All exams are developed by subject matter experts from across the HVAC/R industry, representing a wide variety of perspectives including those involved in the contracting areas, technicians, distributors, educators, manufacturers, and utilities.

Below is the suggested work experience a technician should have prior to taking the NATE certification exams.

- Installation Technician: NATE recommends one year of field experience as an installation technician
- Service Technician: NATE recommends two years of field experience as a service technician
- Senior Technician: NATE recommends that the candidate has at least 5 years of practical experience before sitting for this exam.
Code of Conduct

As a professional NATE certified Technician in the fields of HVACR, I agree to the following:

• I will deal with clients, consumers, and other professionals and professional organizations fairly and in a timely manner.
• I will provide safe and quality services to clients and consumers.
• I will maintain and improve my technical competence through continuing education, peer counseling and interaction with other professionals in my prescribed field.
• I will act in a manner free of bias with regard to religion, ethnicity, gender, age, national origin or disability
• I will not misrepresent or permit misrepresentation of my qualifications or the qualifications of my associates
• Will have regard for the environment and for public safety, health and the well-being of our clients
• I understand that the NATE certificate, logo and marks are the property of North American Technician Excellence (NATE) and must be surrendered upon request.
• I will uphold and follow all policies and procedures required by the Technicians Handbook.
• I will not knowingly violate safety-related regulations, warning or instructions set forth by OSHA, recognized safety standards, or Codes.

Technician/NATE Agreement Statement

Upon completion of your exam you are required to sign your Answer Card agreeing to the statement below:

“By signing and submitting this form, I certify that the test I received was sealed when received, opened and then resealed by myself, and the answers marked on the answer sheet are my own. I also certify that I will not discuss any aspect of the exam after the test session. I understand that if I should become certified, the certificate is the property of NATE and I must surrender it if certification is revoked. I confirm that I have read the candidate hand book and agree to abide by the certification eligibility requirements and the NATE Code of Conduct.”

Test Session Types

Paper and Pencil Test Session

• NATE suggests that you arrive at least 30 minutes before the scheduled exam time.
• Each candidate MUST have as photo ID to present to the Proctor. No one will be allowed to take a NATE exam without it.
• Payment will be collected at this time, if other arrangements have not been made.
• Please be prepared to shut off all electronic devises and to leave them in a safe area designated by the Proctor.
• For paper and pencil tests please bring several # 2 pencils.
• The candidate may bring a non-programmable calculator into the testing area.
• Seats arranged side by side with at least 36 inches of space between each seat.
• The proctor will read an introduction to the testing group, there will be time for questions and answers concerning the exam and they will inform candidates how much time has been allotted for each test.
• Each candidate will receive an unopened/sealed test packet, please read the cover and make sure it contains the correct test that you registered for.
• The Proctor will tell you when to open the packet, please fill out the Answer Card completely
• The Proctor will then tell the candidates to start the tests.
• After you have completed your test, you will either go to the Proctor or they will come to you , the Proctor will check to make sure you have not missed any part of the test and have you sign your Answer Card.
• You will be asked to place your test, answer card, test survey, original envelope and any scrap paper into the return envelope and seal it. You and the Proctor will sign the label stating that the above has taken place.
If you are taking more than one exam, take a short break and then begin again.
The Proctor will return all examination materials back to the NATE Test Administrator within 48 hours. Test documentation will be sent within two (2) weeks to the candidate.

Electronic Test Session
- NATE suggests that you arrive at least 30 minutes before the scheduled exam time.
- Each candidate MUST have as photo ID to present to the Proctor. No one will be allowed to take a NATE exam without it.
- Payment will be collected at this time, if other arrangements have not been made.
- Please be prepared to shut off all electronic devises and to leave them in a safe area designated by the Proctor.
- The candidate may bring a non-programmable calculator into the testing area.
- Seats arranged side by side with at least 36 inches of space between each seat.
- The Proctor will have the Test Session ID number available.
- The Proctor will tell the candidates the time allotted for each test.
- The Proctor will then tell the candidates to start the tests.
- After examination completion click score exam and test results will be immediately available.
- If you are taking more than one exam, take a short break and then begin again.
- The Proctor will close the examination test session and test documentation will be sent within two (2) weeks to the candidate.

Testing Session Times
- Test Session times for each exam is listed below. These times must be adhered to at all times. Test session times will be audited.
- TOs may hold more than one testing session in a single day. Simply indicate on the Test Session Scheduling Form the times for all sessions scheduled for a particular day.
- CORE Exam -2 hours
- AC-Install and Service-2.5 hours
- AD-Install and Service-2.5 hours
- HP-Install and Service-2.5 hours
- Gas-Install and Service-2.5 hours
- Oil-Install and Service-2.5 hours
- Hydronic Oil-2.5 hours
- Hydronic Gas-2.5 hours
- Light Refrigeration-2.5 hours
- Commercial Refrigeration-2.5 hours
- Efficiency Analysts-4 hours
- IGSHPA-4 hours

Test Results
You can access your test results approximately 2 weeks after you have tested at myNATE, if during the test session you provided an accurate email address and a PIN (Personal Identification Number) on the Answer Card. You will also receive results at the mailing address you provided.
Authorization for Release of Pass/Fail to a Third Party

If you are required to have your Pass/Fail information released to a third party, please complete the Authorization for Release of Pass/Fail to a Third Party form.

Passing NATE Exams

When you have earned NATE certification you will receive a NATE patch, a wallet card, a certificate and a chevron reflecting the certification specialty for which you tested. Any additional patches and chevrons can be ordered at the NATE Online Store.

Failing NATE Exams

If you fail the core (if required) or specialty test, certification is not awarded until you successfully retake the test you failed, there is a two year time frame to pass both tests.

Veterans Information

The Veterans Administration (VA) provides a stipend to Veterans for testing. Failed tests are also eligible for payment. The number of tests you may take is unlimited.

The VA pays only for the test and not other expenses associated with obtaining a license or certification. Contact your local VA for more information.

ADA Accommodations

TO’s must comply with the Americans with Disabilities Act (1990), the Civil Rights Act of 1964 (amended 1991), and the Rehabilitation Act of 1973 (amended 1990). If candidates have special needs, they must fill out the Request for Non-Standard Test Accommodations, and submit it to NATE at least 45 days before the test session is scheduled. This will allow the NATE staff time to confirm that special accommodations are required and to notify the Testing Organization and Proctor of the required accommodation(s). NATE will consult with the TO as to the best way to meet the needs of the candidate. The form is available online as part of the Testing Organization & Proctor Guidelines and the Candidate Handbook.

Recertification

Recertification is a requirement. Knowledge in the HVAC/R Industry changes constantly. Changes plus advancements in engineering require you continually update your knowledge and information about the industry.

When to Recertify

NATE requires recertification every five years, depending upon your specialty. Currently GSHP is three years. Please check the KATE’s for verification of recertification requirements.
Two Ways to Recertify

The first way is to retake and pass the specialty test before your certification expires.

The second way is to apply for recertification by using Continuing Education Hours (CEH) and having proof of the 60 hour requirement.

NATE recognizes HVAC/R continuing education and has set up a program to help technicians track their CEHs.

Your CEHs must be in your specialty. If you receive continuing education hours in something outside of your specialty, they do not count toward recertification. Please be aware that some courses apply to only one specialty while others apply to all specialties.

Examples:
- Generally courses in electricity and controls will apply to all specialties.
- Courses on compressors will only apply to Air Conditioning, Heat Pumps and Refrigeration and not to Gas Furnaces or Hydronics Oil
- Oil burners would only fit Oil Furnaces and Hydronics Oil

Note: Educators can earn 60 hours of CEHs for teaching by providing appropriate documentation

Technicians are responsible for maintaining their certification(s).

NATE sends notices in writing to the address in the NATE data base. You will receive a letter at 90 days, an email at 60 days, and a postcard at 30 days, to remind you that your certification is expiring. If you have not updated your contact information, through myNATE, or contacted the NATE office with changes, your recertification notices may not be received.

Please review the following prior to recertifying:

1. Does NATE have all my correct contact information?
2. Do I have Continuing Education Hours (CEHs) that have been recorded from NATE recognized courses that can be applied to my specialty?
3. Do I have Continuing Education Hours (CEHs) that are NOT NATE recognized but I have kept track of and can demonstrate to NATE that these hours apply to my specialty?

Go to myNATE to check your NATE record.

Expired Certifications

A certification that has passed its expiration date is expired at the end of the month of the date shown on the NATE ID wallet card. It is the technicians’ responsibility to retain this wallet card and know when the certification(s) is about to expire.

If your certification expires, you can only recertify by retesting. This may require that you take both the CORE and SPECIALTY tests again. The new certification will date from the time you pass the new tests.

Technicians whose certifications have expired are no longer NATE-certified and cannot represent themselves as such. Any technician with an expired certification who represents himself as NATE-certified is behaving in a fraudulent and unethical fashion. These technicians may be denied future NATE Certification and be subject to legal action.
Recognized Provider Training Program

NATE does not provide any training. NATE has established the NATE-Recognized Provider Training Program, a courtesy program, recognizing training that matches the KATEs, as a way to help technicians track Continuing Education Hours (CEHs). Be sure to check course alignment with your specialty before attending classes.

Go to www.natex.org, click Certifications/Recertification, click Recertification from the drop down menu, click on Recertification Training. 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.

These NATE-Recognized Training Providers align their classes to the KATEs.

When you attend a NATE recognized class make sure you sign the NATE Recognized Provider Attendance Record and put your NATE ID number on the record. Without this information NATE cannot help track your continuing education hours. The technicians are responsible for having their NATE ID number with them when attending classes.

Non–Recognized Courses

Many technicians attend courses to stay current with industry trends and many of these courses relate to their specialties. If the courses, even though they are not NATE Recognized Courses, apply to the technician’s specialty, the technician, at the time of application for recertification, may submit these courses for consideration. NATE does not track these hours; that is the technician’s responsibility. In order to have your hours approved, NATE also requires you to provide a Certificate of Attendance from the training provider.

The certificate must have the technician’s name, class hours, training provider, contact information and a description of the course to be accepted.

Remember, the technician is responsible for maintaining these certificates until applying for recertification.

To apply for recertification, before certification expires, submit the Recertification Application and a copy of your records from the NATE system.

You may also include copies of all certificates from courses that were taken at a NATE recognized training organization but do not show up on your record as a credit in your specialty, and/or copies of certificates from all courses for your specialty, from training organizations that are not NATE recognized, but align with KATE specialty descriptions.

NATE recertification fees using continuing education hours are located on the NATE website.

These recertification fees only apply to recertification using Continuing Education Hours. If recertifying by testing, the fee is determined by the Testing Organization.
Appeals
A candidate may request redress for issues concerning their certifications status including but not limited to:

Exam Pass/Fail

Denial of certification and/or recertification

Redress for continuing education hours

The candidate must request, in writing, an action for review. Once the request is received, NATE reviews the request as follows:

Exam Pass/Fail-the exams are placed into the formal review process. Once the review is complete, a letter is sent to the applicant explaining the status of the review.

Denial of certification and/or recertification is based on the passing score of the exam. If the candidate requests, the exams will be reviewed.

Redress for continuing education hours-all files for recertification using continuing education are reviewed to determine if the submitted hours are documented and authentic. A candidate may request the hours be reviewed if they are denied for any reason.

Formal Test Review Policy & Procedure

1. Candidate must request in writing (within 60 days of posted mailing date in NATE Contact data Base by regular mail or email) a review of exam and questions. Candidate provides the following:
   - Name
   - Contact Information
   - NATE ID#
   - Test Date
   - Location and Time of Exam
   - The test being appealed
   - Exam Proctor
   - Explanation of why the specific exam is to be reviewed

2. The NATE test administrator will send a copy of the test answer sheet to the NATE office along with the candidates’ Test Survey if one was completed.

3. The exam is re-graded.

4. All incorrectly answered questions will be reviewed and compared to statistical evidence used by the NATE Technical Committee to validate that the correct answer in the data bank truly is correct.

If the “correct” answer is found to be incorrect, credit will be issued to the candidate.

5. Upon completion of the review, the VP-Certification notifies the Appeals Committee of the findings, if they agree, then the candidate is notified of the results of the audit.

6. If the candidate’s test review is successful and a passing grade is achieved the candidate is sent a letter of notification, and all certification documents.

7. If the Candidate’s test review does not produce any credits that raise the score to passing, the candidate is notified of the unsuccessful review.
Complaints

NATE has received complaints about Testing Organizations, Proctors, Candidates and/or the Contractors who employ those candidates, for any number of reasons. Each complaint is reviewed after receiving the complaint in writing. The party complained about is given the opportunity to answer the complaint. After review of the information from both entities NATE makes a decision based on the evidence presented and the request received. The decision can be:

• No action taken
• Removal/suspension of certification
• Removal/Suspension of a Testing Organization or Proctor
• Removal/suspension of the contractor from the locator system

Suspension and Revocation of Certification

In the event NATE receives a request for the suspension/revocation of an individual’s certification, NATE will follow the following process: If not already received, NATE will require a formal written request for suspension and/or revocation. The request must contain an original signature from the complainant. The request must detail the reasons for the request and cite the areas of knowledge as the cause for the request. The request must be addressed to the VP, Certification.

NATE will review and acknowledge receipt of the request within 30 days of receipt.

NATE will inform the certified individual in writing of the nature of the request and allow the certified individual 30 days to respond in writing to the request.

Copies of all written communication will be provided to the certified individual and the complainant that initiated the request.

If the certified individual does not respond within the allotted time frame, the certification will automatically be suspended or revoked per the requested complaint. The certified individual and the complainant will be notified in writing of the suspension/revocation.

If the certified individual provides a response within the allotted time frame, NATE will review the response and provide copies to the complainant that initiated the request.

NATE will establish a subcommittee of the NATE Technical Committee to review suspension/revocation requests. The subcommittee will be comprised of at least 6 active Technical Committee members and the VP, Certifications. The committee will review documents sent electronically. No individual on the subcommittee will reside or provide services to consumers in the same geographic area in which a party to the process resides or provides services to the consumer.

The decision to suspend/revoke the certification of the certified individual will be made by the Technical Committee Subcommitteebased solely on the written response of the certified individual, the written information supplied by the complainant and review of the knowledge area of the certification to be suspended and or revoked.

The decision rendered by the Technical Committee Subcommitteebased will be provided in writing to the certified individual and the complainant within 30 days of receiving a response from the certification holder. The decision by the Technical Committee subcommittee will be considered final unless the certified individual appeals.

The decision may be appealed to the full Technical Committee at a regular scheduled committee meeting. Full Technical Committee meetings are held twice a year in the winter and summer. Any decision rendered by the full technical committee will be provided in writing to the certified individual and the complainant within 30 days of the decision made at the regularly scheduled Technical Committee meeting. The complainant and certified individual
may appear at the regular Technical Committee meeting, at their own expense.

The decision, if required, by the Technical Committee may be appealed on procedural grounds only to the full NATE Board of Trustees at a regular scheduled Board meeting. The Board will not review the reason for the suspension/revocation. Full Board meetings are held twice a year in the spring and fall. Any decision rendered by the full NATE Board of Trustees will be considered final and will be provided in writing to the certified individual and the complainant within 30 days of the decision made at the regularly scheduled Board of Trustees meeting. The complainant and certified individual may appear at the regular Board of Trustees meeting, at their own expense.

NATE Online Store

North American Technician Excellence (NATE) products can now be purchased online.

Technicians can purchase patches and chevrons and copies of their certificates and wallet cards.

Please visit the store for other NATE products such as hats, shirts, decals etc.

If you have questions, after reading these guidelines, please call the NATE office at 1-877-420-6283.

Sealed and Tampered Test Packets

![Untampered test packet](untampered.png)

![Tampered test packet](tampered.png)
Request for Non-Standard Test Accommodation

This information requested below and any documentation regarding your disability and your need for accommodations in testing will be considered strictly confidential and will not be shared with any outside source without your express written permission.

Name ____________________________________________________________

Address _______________________________________________________________________

Phone _______________________________________________________________________

Accommodations requested for NATE Certification Testing:

Exam Site ___________________________________________ Date ___________________

Please check all that apply:

☐ Accessible Exam Site
☐ Braille
☐ Large Print
☐ Tape
☐ Reader (choose one):
  ☐ for visual impairment ☐ for learning disability
☐ Scribe (choose one):
  ☐ for visual impairment ☐ for learning disability
☐ Extended time
☐ Separate testing Area
☐ Other Accommodations (specify) ____________________________________________

I understand that I must forward all required paperwork with this document at least 45 days prior to my exam date in order to be processed.

Signature ______________________________________________________ Date ___________________

NATE Documentation of Disability Related Needs

If you have a learning disability, a psychological disability, or other disability that requires an accommodation in testing, please have this form completed by an appropriate licensed professional (psychologist, physician, or surgeon) to certify that your disabling condition that requires the requested exam accommodation.

If you have existing documentation of having the same or similar accommodation provided to you in another test administration you may submit such documentation instead of having this form completed.
Technician Recertification Application
Using Continuing Education Hours

Submit to: NATE • attn: Recertification Application
2111 Wilson Blvd. Suite 510 • Arlington, VA 22201
Questions? Call 877.420.6283 (NATE)

THIS FORM MUST BE RECEIVED BEFORE YOUR CERTIFICATION EXPIRATION DATE

This form is to be completed when applying to recertify using continuing education hours accumulated during the 60 months of certification. The completed form is to be returned to the address listed above.

Please provide the following technician contact information. All fields labeled with an asterisk (*) are required. Forms with incomplete required fields will not be processed.

Technical Info:
First Name* ___________________________ Last Name* ___________________________
Mailing Address* ________________________________________________________________
City* ________________________________ State* ___________ Zip* ____________________
Home Phone ___________________________ Mobile Phone __________________________
Personal Email Address* ________________________________
NATE ID Number* ______________________

Check the boxes ONLY in the specialties you are recertifying.

☐ Service Air Conditioning ☐ Installation Air Conditioning ☐ Senior Efficiency Analyst
☐ Service Air Distribution ☐ Installation Air Distribution
☐ Service Gas Furnace ☐ Installation Gas Furnace
☐ Service Gas Hydronic ☐ Installation Gas Hydronic
☐ Service Heat Pump ☐ Installation Heat Pump
☐ Service Oil Furnace ☐ Installation Oil Furnace
☐ Service Oil Hydronic ☐ Installation Oil Hydronic
☐ Service Commercial Refrigeration ☐ Installation Commercial Refrigeration
☐ Service Light Commercial Refrigeration ☐ Installation Light Commercial Refrigeration

Employer Info:
Company Name* ___________________________
Mailing Address* ________________________________
City* __________________________________ State* ___________ Zip* ___________
Company Phone ___________________________ Company Fax _______________________
Company Email Address ___________________________

Kdrive ANSI 17024 Approved Document  Nov 2011
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For pricing go to www.natex.org/HVAC_HVACR/recert_cost.html

Credit Card Information
- [ ] Check enclosed
- [ ] Visa
- [ ] Master Card
- [ ] American Express
- [ ] Discover

Name on Card ____________________________ Signature ____________________________

Card Number ____________________________ Expiration Date (D/M/Y) ____ / ____ / ____ CV2 ______

Check Information

Name on Check ____________________________ Check Number ____________________________

NOTE: The approved provider information is reviewed for completeness only. NATE exercises no control over an organization, its views, accuracy of information, copyright or trademark compliance, or the legality of information or programs offered by an provider. Risk for information provided is borne by the candidate (buyer beware- use due diligence) NATE specifically disclaims any and all liability from damages which may result from the utilization of the information provided.

I have attached proof of verifiable continuing education with a minimum of 60 hours of training accumulated during the 60 months of certification.

I expressly state that everything stated herein is true and accurate. Falsification of certification or re-certification documents provides grounds for revocation of certification.

Signature ____________________________ Date ____________________________

If not signed, this form cannot be processed
Authorization for Release of Pass/Fail to a Third Party

2111 Wilson Blvd. Suite 510
Arlington, VA 22201
Questions? Call 877.420.6283 (NATE)
www.natex.org

By the affixing of my signature below, I hereby give release and authority to NATE/VGI Training of Arlington, Texas to transfer my test results and certification info to:

Date of Test Session _____________________ Testing Organization Number _________________________

I further understand that my results and certification status will not be transferred outside the above agency or NATE/VGI Training unless released in writing by me.

Name (print) ___________________________________________ ID # __________________________
Signature ______________________________________________
Name and Address of Third Party ____________________________________________________________

Name (print) ___________________________________________ ID # __________________________
Signature ______________________________________________
Name and Address of Third Party ____________________________________________________________

Name (print) ___________________________________________ ID # __________________________
Signature ______________________________________________
Name and Address of Third Party ____________________________________________________________