A GUIDE FOR RECOGNIZED TRAINING PROVIDERS (RTPs)

How To Use the myNATE Website
INTRODUCTION

Thank you for your support of the NATE certification program, and for teaching others to excel. This guide will address:

1. myNATE account activation
2. Course registration
3. Submitting rosters
4. Adding instructors
5. Course renewal
USER LOGIN

• Go to www.myNATE.org. Log in with your myNATE username and password, or create an account using the activation information contained in your approval email.
• Select the “RTP” tab to access the RTP section of the website.

• The course viewer will display first after clicking the RTP tab. If you are the admin for more than one RTP, you can use the RTP selector to change RTPs.

• This view allows you to see your courses, course statuses, and course expiration dates.

• To view more detailed information about a course, click the magnifying glass to the right of the course.

• If the course has expired or is within 6 months of its expiration date, you will also see a renew course button.
### RTP Administrator Management

**RTP Selector**: North American Technician Excellence (1597)

#### Reference Code | Title | Description | Status | Expiration | Actions
--- | --- | --- | --- | --- | ---
| | Sample Course | Sample | Rejected | 9/3/2014 | ![Reject] |
| 1587-0060 | Sample Course | Sample description | Expired | 11/18/2016 | ![View] |
| 1587-0061 | Sample Course | Sample description | Approved | 11/28/2020 | ![View] |

**Limit Search To**: Reference Code, Title, Specialty, All Training

**Approval Status**: Pending, Rejected, Resubmitted, Approved, Expired, All

**Include Discontinued Items**: [ ]
SUBMITTING A NEW COURSE

• To submit a new course, click the “Add Training” button on the “Course Viewer” page.

• This will open up the training editor. Please complete the following fields:
  
  - Title
  - Description
  - Credit Measurement Unit
  - Training Category
SUBMITTING A NEW COURSE CONTINUED

• The final part of registering a new course is selecting which specialties will be registered to the course, and for how many hours.

• A technician would need to hold an active certification in at least one of those specialties in order to receive credit for attending your course.

• Select all specialties that are relevant to your course.

• Enter the course length in hours in the box to the right of each specialty.
• Once all of your course information is entered, click the continue button in the lower right hand corner.

• This will bring you to the payment options screen. You can either choose “Pay by Purchase Order” to be invoiced by NATE or “Pay by Credit Card” to pay with your credit card online.

• If your organization prefers to be invoiced, but does not use purchase orders, select pay “Pay by Purchase Order” then enter “none” or “N/A” as the PO number.
SUBMITTING A NEW COURSE CONTINUED

- Once submitted, your course status will be set to “Pending.” NATE will then review your course. If everything has been submitted correctly, the course will be approved.

- If something needs to be changed, your course status will be set to “Rejected”, and you will receive an email with instructions on how to fill in any missing information.

- You can continue to edit the course while its status is pending. Please note this will change the status to “Pending After Resubmittal”.

- You will receive an email when the course is approved or rejected.
• To submit an attendance roster online, select the “Submitted Course Hours” tab.

• Click the “Download Empty Roster Template for Uploads” link.

• This will download an Excel file, which is used as a template for uploading course hours.

• Enter the NATE ID number, first name, and last name of each person who attended your course.

• Save the template with a name you can remember, to upload it later.
## Submitting a Class Roster Continued

### Excel Example

![Excel Sheet](image)

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>NATE ID</td>
<td>First Name</td>
</tr>
<tr>
<td></td>
<td>2286234</td>
<td>Tony</td>
</tr>
<tr>
<td>2</td>
<td>8842391</td>
<td>Jane</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Spagnoli</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>Doe</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1. Next, click the “Upload Roster” button under the “Submitted Course Hours” tab.

2. Select the course for which you are uploading the roster from the drop down menu under “Training.”

3. Enter the start date and end date of your course, and the location in which it was held (city, state).

4. Click the “Add files” button and select your upload document.
SUBMITTING A CLASS ROSTER CONTINUED

![Image of RTP Administrator Management interface](image)

<table>
<thead>
<tr>
<th>Reference Code</th>
<th>Course Title</th>
<th>Participants</th>
<th>Start Date</th>
<th>End Date</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>In-house Safety Training</td>
<td>13</td>
<td>04/24/2018</td>
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<td>YANKTON, SD</td>
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Total Items: 10437
SUBMITTING A CLASS ROSTER CONTINUED
• You will be able to verify that the information you entered on the template matches what is recorded in NATE’s database.

• Slight differences in first names are allowed, e.g. Bill instead of William.

• The system will alert you if any NATE IDs are incorrect. If you have made a mistake, update your template and upload it again.
ADDING INSTRUCTORS

• You can add additional instructors to your RTP through myNATE

• Instructors are individuals connected to the RTP, who can submit class rosters, but cannot register new courses.

• Only the administrator can register new courses.
• If a person does not have a myNATE login from a different role with NATE, they need to go to www.myNATE.org, and click on the First Time User? tab.

• They can select “Instructor” as their activation type and create a myNATE account.

• Once created, they can provide their username to an RTP admin, who can then add them to the organization.
• To add an instructor to your RTP, go to the “Instructors” tab in your RTP Administrator Management window.

• This tab will include all instructors associated with your RTP.

• Click the “Add Additional Instructor” button, and then search by the instructor’s name or username.

• Click “Select” to the left of the search window to add the instructor to your organization.
ADDING INSTRUCTORS CONTINUED
• Instructors have a similar, but limited view compared to the RTP admin.

• They will have a “Training” tab. When they click on that tab, it will bring them to the “Roster Upload” (Instructor) window, which is the same as the “Submitted Course Hours” tab of their RTP.

• They then follow the same procedure for submitting class rosters outlined above.
### Roster Upload (Instructor)

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**Total Items:** 10437

**Page Size:**

- 10
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- Forward
- 5
- Next
- Last
RENEWING A COURSE

• A “Renew” button will appear under the “Actions” column on the course viewer 6 months before a course expires.

• To renew a course, simply click on this button.

• You will then see training editor, and be able to your course information.

• Follow the same procedure as submitting a new course to renew the course.
RENEWING A COURSE CONTINUED
RENEWING A COURSE CONTINUED

Training Editor

Course Reference Code
1587-0060

Title
Sample Course

Description
Sample description

Current Approval Status: Pending (Renewal)

Unassociated Specialties
- Air Distribution Installation
- Air Distribution Service
- Commercial Refrigeration Installation
- Commercial Refrigeration Service
- Gas Heating (Air) Installation
- Gas Heating (Air) Service
- Ground Source Heat Pump Installation
- HVAC Performance Verifier
- Hydronics Gas Installation

Associated Specialties & Units
- Air Conditioning Installation
- Air Conditioning Service
- Air to Air Heat Pump Installation
- Air to Air Heat Pump Service
- Efficiency Analyst Senior

Buttons: Cancel, Continue
RENEWING A COURSE CONTINUED

Payment

Payment for the following items is required in order to proceed:

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Price</th>
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</thead>
<tbody>
<tr>
<td>Training Course Renewal for North American Technician Excellence (1587) - Course: Sample Course</td>
<td>1</td>
<td>$95.00</td>
<td>$95.00</td>
</tr>
</tbody>
</table>

Total: $95.00

Please choose a payment method below to proceed.

If you are not paying with a credit card, click the Purchase Order button and enter the PO number.

Pay by purchase order  Pay by credit card
NEED HELP?

Please contact the NATE customer service line at 877-420-6283 or askNATE@natex.org.