



New NATE Training Portal

Guide to using the new myNATE website

Application



- To get set up to be able to register courses with NATE, please complete the Recognized Training Organization Application located at www.natex.org.
- This application is located under the “Partners & Testing” tab, then the Applications link.
- Once approved, you will receive a confirmation email with your Provider Number and an activation code.

First Time Login



- If you do not have a myNATE login, you would need to create one before you would be able to register courses. To do so, click the “First Time User?” tab, and select the “RTP / Training Organization” activation type.

Sign in to Castle Connect

First Time User? Returning User?

If you have taken a test through Castle Worldwide and this is your first visit to the Connect site, please use your activation code to associate your new user account with your testing information.

Use your previously provided **activation code** to request an account.

Activation Type	RTP \ Training Organization
If you have a Training Org	-- select activation type --
Activation Code	Paper based exam
Provider Number	Computer based exam
	NATE ID and pin
	Proctors
	Testing Organizations
	RTP \ Training Organization
	C3 Contractor
	Activate

First Time Login Cont.



- The site will now request your activation code and provider number, which is provided in your confirmation email.
- If you are an existing Training Organization contact that registered prior to April 2014, but never created a myNATE login, your activation code is your original password, and the provider number is your TO#.
- After the information is entered, click “Activate”. Your information will appear below. You will then complete the remaining fields (which include selecting a myNATE username/password).
- Once completed, click the register button, which will send you a verification email. After, your email address is verified, you can login with your new username and password.

Returning User Login



- Go to www.myNATE.org. Your original myNATE login still works on the new site. If you do not recall your password, you can use the Lost/Forgotten password feature to reset it.

Sign in to Castle Connect

First Time User? **Returning User?**

Enter your username and password.

Username

Password

Sign In [Lost/Forgotten Password?](#)

Course Viewer



- Select the “RTP” tab to access the RTP section of the website.
- You will by default start at the course viewer section of the RTP. 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 all your courses, course status, and the course expiration date.
- To view more detailed information about the course, including the registered specialties, 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.

Course Viewer Cont.



RTP Administrator Management

RTP Selector: North American Technician Excellence (1587)

[Course Viewer](#) |
 [Submitted Course Hours](#) |
 [Profile](#) |
 [Location](#) |
 [Instructors](#) |
 [Administrators](#)

[Add Training](#)

filter trainings ✕ Go!

Limit Search to: Reference Code | Title | Specialty | **All Training**

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

Include Discontinued Items:

Reference Code	Title	Description	Status	Expiration	Actions
1587-0024	Instructor's Workshop	Annual Instructor Workshop Course.	Approved	4/6/2016	
1587-0041	Preparing for Your Utility Gas M	Two 3 hour Sessions Safe Installation of Nat	Approved	3/19/2016	
	Sample Course	Sample	Rejected	9/3/2014	
1587-0060	Sample Course	Sample description	Approved	11/18/2016	
	Sample Test	Sample Description	Pending After Resu...	None	
	Sample Title	Sample Description	Rejected	1/1/1901	
1587-0044	Sizing Steam Boilers and Maki	3 Hour covers that covers the sizing of steam boilers a	Approved	3/19/2016	
1587-0012	Teachers workshop 2007		Expired	3/27/2011	
1587-0002	Technical Committee Service	Credit for members for attending the technical commit	Expired	9/10/2014	
1587-0019	Test	test	Expired	11/17/2014	

Total Items: 37 Page Size: 10 3

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 all the fields:
 - Title: Name of the course.
 - Description: Listing of the topics covered by the course.
 - Credit Measurement Unit: NATE uses Continuing Education Hours for all courses
 - Training Category: NATE has three categories to chose from, Course, Seminar, and Conference. Please select the one that best describes your training.

Submitting a New Course Cont.



- 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.
- Please select all specialties that are relevant to your course.
- You can specify the length of the course by entering the length in hours in the box to the right of each specialty.
- Safety, electrical, and soft skills courses apply to all specialties.

Submitting a New Course Cont.



Training Editor

Title
Sample Residential Cooling Course

Description
This four hour course covers topics relevant to AC and Heat Pump

Credit Measurement Unit
Continuing Education Hours

Training Category
Course

Unassociated Specialties	Associated Specialties & Units
Air Distribution Installation	Air Conditioning Installation 4
Air Distribution Service	Air Conditioning Service 4
Commercial Refrigeration	Air to Air Heat Pump Installation 4
Commercial Refrigeration Efficiency Analyst Senior	Air to Air Heat Pump Service 4
Gas Heating (Air)	
Gas Heating (Air) Service	
Ground Source Heat	
HVAC Performance	

Cancel Continue

Submitting a New Course Cont.



- 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 chose the “Pay by Purchase Order” to be invoiced by NATE or “Pay by Credit Card” to pay with your credit card online.
- If your organization wants to be invoiced, but does not use purchase orders, select pay by purchase order, then enter “none” or “N/A” as the PO number.

Submitting a new Course Cont.



Payment

- 1 Invoice
- 2 Payment
- 3 Verification
- 4 Confirmation

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

Item	Quantity	Unit Price	Price
Training Course for North American Technician Excellence (1587) - Course: Sample Cooling Course	1	\$95.00	\$95.00
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

Submitting a New Course Cont.



- 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”).

Submitting a Class Roster



- To submit an attendance roster online, select the “Submitted Course Hours” tab. From there, 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 that attended your course.
- Save the template with a name you can recognize to upload it later.

Submitting a Class Roster Cont.



- Next, click the “Upload Roster” button under the “Submitted Course Hours” tab.
- Select the course you are uploading the roster for from the drop down menu under “Training.”
- Enter the start date and end date of your course and the location it was held (city, state).
- Click the “Add files button” and select your upload document.
- You will be able to verify what you entered on the template matches what is in NATE’s database (slight differences in first names are fine, such as Bill instead of William).
- The system will alert you if any NATE IDs do not exist in the system. If you have made a mistake, please update your template and upload it again.
- Screenshots of this process are on the next 4 slides.

Submitting a Class Roster



RTP Administrator Management

RTP Selector

North American Technician Excellence (1587)

[Course Viewer](#)

[Submitted Course Hours](#)

[Profile](#)

[Location](#)

[Instructors](#)

[Administrators](#)

[Download Empty Roster Template for Uploads](#)

Upload Roster

Reference Code	Course Title	Participants	Start Date	End Date	Location
1587-0003	Credit hours for teaching-...	1	04/03/2014	04/03/2014	
1587-0003	Credit hours for teaching-...	1	04/01/2014	04/01/2014	
1587-0003	Credit hours for teaching-...	1	03/25/2014	03/25/2014	
1587-0003	Credit hours for teaching-...	1	04/01/2014	04/01/2014	
1587-0003	Credit hours for teaching-...	1	03/28/2014	03/28/2014	
1587-0003	Credit hours for teaching-...	1	03/31/2014	03/31/2014	
1587-0003	Credit hours for teaching-...	1	03/25/2014	03/25/2014	
1587-0003	Credit hours for teaching-...	1	03/21/2014	03/21/2014	
1587-0003	Credit hours for teaching-...	1	03/20/2014	03/20/2014	
1587-0025	Venting For the Future	5	09/24/2014	09/24/2014	Laurel, MD

Total Items: 10365

Page Size: 10



Submitting a Class Roster cont.



Upload CEH Credit Roster

1 Upload CEH Credits 2 Preview Results 3 Commit

Training

Sample Course (1587-0060)

Sample Course (1587-0060)
Sample description

Course Reference Code: 1587-0060

Approved?: Yes

Expiration Date: 11/18/2016

Associated Specialties:

Air Conditioning Installation : 4 Credit(s)
Air Conditioning Service : 4 Credit(s)
Air to Air Heat Pump Installation : 4 Credit(s)
Air to Air Heat Pump Service : 4 Credit(s)
Efficiency Analyst Senior : 4 Credit(s)

Start Date

12/04/2014

End Date

12/05/2014

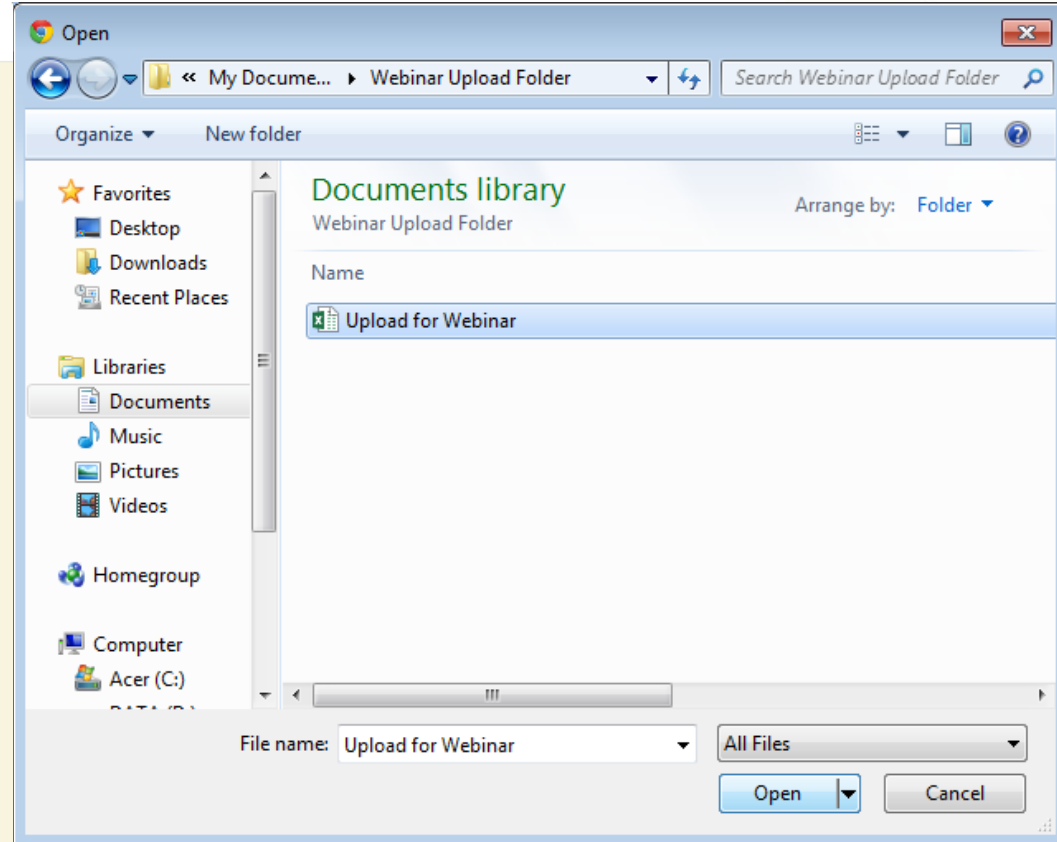
Location

Arlington, VA

Upload Import File

Upload for Webinar.xlsx

9.58 KB



Submitting a Class Roster Cont.



Upload CEH Credit Roster

1 Upload CEH Credits 2 Preview Results 3 Commit

All items were matched. Click Save to complete the upload.

NATE ID	First Name (Upload)	Last Name (Upload)	First Name (Server)	Last Name (Server)	Matched
2286234	Tony	Spagnoli	Tony	Spagnoli	Matched ✓
8842391	Jane	Doe	Jane	Doe	Matched ✓

Cancel Save

Upload CEH Credit Roster

1 Upload CEH Credits 2 Preview Results 3 Commit

Upload Complete! Click done to close the window.



Renewing a Course



- 6 months before a course expires or after a course has expired, a new action button will appear on the course viewer to renew that course.
- To renew a course, click on the renew action button.
- This will bring up a similar training editor to when you register a course for the first time. You will be able to edit the title, description, and the associated specialties for a course when renewing it.
- You will follow the same payment procedure as submitting a new course, and then submit the course to NATE for renewal.

Renewing a Course Cont.



1587-0019	Test	test	Expired	11/17/2014		
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Training Editor ✕



Course Reference Code
1587-0019

Title
Test

Description
test

Current Approval Status: Pending (Renewal)

Unassociated Specialties	Associated Specialties & Units
Air Distribution Installation	Air Conditioning Installation 2
Air Distribution Service	Air Conditioning Service 2
Commercial Refrigeration Installation	Air to Air Heat Pump Installation 2
Commercial Refrigeration Service	Air to Air Heat Pump Service 2
Efficiency Analyst Senior	
Gas Heating (Air) Installation	
Gas Heating (Air) Service	
Ground Source Heat Pump Installation	
HVAC Performance Verifier	

Cancel **Continue**

Renewing a Course Cont.



Payment x

1 Invoice 2 Payment 3 Verification 4 Confirmation

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

Item	Quantity	Unit Price	Price
Training Course Renewal for North American Technician Excellence (1587) - Course: Test	1	\$95.00	\$95.00
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.

Need Help?



- This concludes the training guide for submitting course, class rosters, and renewing courses.
- If you have any questions about this process or difficulty submitting a course or class roster, please contact NATE customer service at 877-420-6283 or askNATE@natex.org.