New NATE Testing Portal

Guide to using the new myNATE website
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.
Login Cont.

• If you never created a myNATE login (have not logged into the site since myNATE launch April 2012), you would need to create your myNATE login. To do so, click the “First Time User?” tab, and select the “Proctors” activation type.

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**

- Proctors
- Paper based exam
- Computer based exam
- NATE ID and pin

**Activation Code**

- Testing Organizations
- RTP / Training Organization
- C3 Contractor
Login Cont.

- The site will now request three fields, Activation Code, NATE ID, and Provider number. These three fields correspond to your original pre-2012 login.

- Activation code is your password, NATE ID is your proctor ID, and 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.
Once logged onto myNATE, you will want to go to the “Order Exams” tab.

To create a new order, click on the plus sign in the upper right hand corner of the “My Paper and Pencil Orders” window.
Paper Exams – Ordering Paper Exams

- The first window that opens when you create a new exam orders asks you to select your testing organization.
- Click the select button to the right of the testing organization you are proctoring on behalf of.
Paper Exam – Exam Quantity

• After you select your testing organization, you will then see the a paper and pencil exam order screen.
• The first section has you specify exam quantity per specialty type.
• Type in the number of exams you need for each specialty type.
• Please limit the number of exams you order to what you reasonably expect to give.
• The total exams for your order will be displayed at the bottom of this section of the order form.
### Available Exams

<table>
<thead>
<tr>
<th>Amount</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>25</td>
<td>Core</td>
</tr>
<tr>
<td>5</td>
<td>AC Installation</td>
</tr>
<tr>
<td>5</td>
<td>AC Service</td>
</tr>
<tr>
<td></td>
<td>Air Distribution Installation</td>
</tr>
<tr>
<td></td>
<td>Air Distribution Service</td>
</tr>
<tr>
<td></td>
<td>Air to Air Heat Pump Installation</td>
</tr>
<tr>
<td></td>
<td>Air to Air Heat Pump Service</td>
</tr>
<tr>
<td>5</td>
<td>Commercial Refrigeration Service</td>
</tr>
<tr>
<td>5</td>
<td>Gas Heating (Air) Installation</td>
</tr>
<tr>
<td>5</td>
<td>Gas Heating (Air) Service</td>
</tr>
<tr>
<td></td>
<td>Hydronics Gas Service</td>
</tr>
<tr>
<td></td>
<td>Hydronics Oil Service</td>
</tr>
<tr>
<td></td>
<td>Light Commercial Refrigeration Service</td>
</tr>
<tr>
<td></td>
<td>Oil Heating (Air) Service</td>
</tr>
<tr>
<td></td>
<td>Senior Level Efficiency Analyst</td>
</tr>
<tr>
<td></td>
<td>Industry Competency Exam (ICE) - Commercial Refrigeration</td>
</tr>
<tr>
<td></td>
<td>Industry Competency Exam (ICE) - Light Commercial Air Conditioning and Heating</td>
</tr>
<tr>
<td>50</td>
<td>Total Exam(s)</td>
</tr>
</tbody>
</table>
Paper Exams – Dates

• The next section of the paper exam ordering process will ask you for dates association with your order.
• The tentative test date should be the date you plan on giving the exams. If you order spans multiple test dates, please indicate the date of the first exam here.
• The “I need the exams delivered by” date is the date NATE will aim to have your shipment delivered by.
• Please note: NATE’s print-on-demand service needs up to 8 business days to process your order without any rush shipping charges.
• You can use the calendar button at the end of the field, which will bring up an interactive calendar to choose the date.
Selecting a Proctor and Location

- The next section of the order form will have you select the proctor and location of the session.
- You should see your name displayed as the proctor for the session.
- If your organization has multiple organization registered, you can select one of those other locations. If not, just select “Main.”
Paper Exams – Select a Shipping Address

• The final portion of placing a paper exam order is completing the shipping address.
• You can use the “Use Location Address” to auto-fill the shipping address with the testing organization’s location.
Paper Exams – Submitting the Order

• After you have completed the order form, click the “Save” button in the lower right hand corner.

• You will now see this exam order on your list of orders in the “My Paper and Pencil Exam Orders window.”

• Under the “Action” column you will have three options:
  – View/Edit Order (Eye): You can click this button to edit the number of exams, shipping information, or any other part of the exam order form. After submission, you would still be able to click this action button to view the information, but you would no longer be able to edit the order.
  – Delete (Trashcan): This deletes this order. Orders can only be deleted prior to submission.
  – Submit (Airplane): This submits the order to NATE. Once submitted, you would not be able to edit the order.
### Paper Exams - Submitting the Order

<table>
<thead>
<tr>
<th>Date Needed</th>
<th>Status</th>
<th>Number Of Tests</th>
<th>Testing Organization</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/21/2015 12:00 am</td>
<td>New</td>
<td>50</td>
<td>North American Technician Excellence (1587)</td>
<td>View/Edit</td>
</tr>
</tbody>
</table>

- **View/Edit Order**
- **Delete Order**
- **Submit Order**
Paper Exams Submitting the Order

- After you click the submit button, a checklist will appear.
- This checklist will check to make sure the exam time, date needed, location, and exam quantities are all properly configured.
- You will then be able to select your payment option by clicking the “Make Payment” button.
Paper Exams - Submitting the Order

**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>
</tr>
</thead>
<tbody>
<tr>
<td>Air to Air Heat Pump Service</td>
<td>1</td>
<td>$120.00</td>
<td>$120.00</td>
</tr>
<tr>
<td>Core</td>
<td>2</td>
<td>$120.00</td>
<td>$240.00</td>
</tr>
<tr>
<td>AC Installation</td>
<td>1</td>
<td>$120.00</td>
<td>$120.00</td>
</tr>
<tr>
<td>AC Service</td>
<td>1</td>
<td>$120.00</td>
<td>$120.00</td>
</tr>
</tbody>
</table>

Total: $600.00

Please choose a payment method below to proceed:

- Pay by purchase order
- Pay by credit card

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

Payment

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

Please enter the credit card and billing information below and click Next.

Credit Card Information
- First Name
- Last Name
- Credit Card Number
- Exp. Month
- Exp. Year
- CVV Code

Billing Information
- Street Address
- City
- State
- Zip Code

< Back  Next >
Paper Exams - Submitting the Order

Payment

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

Please enter the purchase order information below and click Next.
If you do not have a PO number and need to be invoiced, enter "NONE" in the PO box.

**Purchase Order Information**

Webinar Example

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Paper Exams - Submitting the Session

• Once the payment has been confirmed, you will be able to go back to the checklist and submit your session.
Paper Exams - Submitting the Order

• Click the PnP Order Submit button.
• At this point the session has been sent to NATE for review and approval.
• Within 24 hours, you will receive a notice from NATE via email that your order has been accepted, or contacted by NATE if we need more information prior to your order being approved.
• NATE will then send you a second notice via email when your order has been shipped, with your tracking number, and a copy of the proctor script.
Paper Exams – Submitting the Order

Submit Paper and Pencil Order

- Test Time Properly Set
- Date Needed Properly Set
- Location Properly Configured
- Roster Properly Configured
- Billing Processed

Ready To Submit

Cancel  PnP Order Submit
Paper Exams – Proctoring the Session

• You should receive your exams on or before your need by date.

• The candidates will have a sealed exam booklet for each exam they are taking and a demographic card.

• Prior to beginning the exam, please have the candidate complete their demographic card.

• Please ensure the candidate marks all their answers on the answer card, and not in the exam booklet.

• The answer card, test survey, T/P Chart, and other necessary exam items tear out of the back of each booklet.
Paper Exams – Proctoring the Session

• After the candidates have completed their exams, please have them seal their materials in the return envelopes.

• Repackage and return all exam materials to:
  
  NATE
  
  2111 Wilson Blvd. Suite 510
  
  Arlington, VA, 22201
Technician Activation

- Technicians receive emails when they have been added to a testing session with information on how to create a myNATE login. Technicians with existing myNATE logins do not need to create a new account.
- The technician will want to go to www.myNATE.org, then select the “First Time User?” tab.
- The technician will then want to select either the “Paper Based Exam” or “Computer Based Exam” activation type.
- It will then ask for their activation code (contained in the email) and last name.
- The activation code contains all lower case letters and numbers. All “0” like characters are zeroes not O’s.
Technician Activation

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**
- Computer based exam

If you took a **computer-based exam**, your activation code is the password that you used to login to your proctored exam.

**Activation Code**: 6e3dda0560ff

**Last Name**: Technician

**Activate**

**Username**

**Email Address**

**Password**
If you took a **computer-based exam**, your activation code is the password that you used to login to your proctored exam.

<table>
<thead>
<tr>
<th>Activation Code</th>
<th>6e3dda9560ff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Technician</td>
</tr>
</tbody>
</table>

**Activate**  **De-activate**

**Username**

**Email Address**

**Password**

**Confirm Password**

**Prefix**

**First Name**

**Middle Initial**

**Last Name**

**Suffix**
Technician Profile

• In order to keep in touch with technicians, NATE needs their contact information to stay updated.

• To add or update a mailing address, email address or phone number the technician needs to login into myNATE. Once logged in, they would need to select the profile button.

• If it is their first time logging in, then the profile will automatically open and will need to be completed before they can view any other part of their record.
Technician Profile Cont.

• Please reinforce during your sessions that if technicians can view results, manage their certifications, and tracking their CEH on myNATE.

• If technicians have any difficulty creating their myNATE logins, they can contact NATE customer support (askNATE@natex.org or 877-420-6283)