Technician Handbook
North American Technician Excellence

Technician Handbook

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NATE Certification

To earn NATE Certification in Service or Installation you must pass both a Core and a Specialty exam. Please note this is not a requirement for Ground Source Heat Pump (GSHP) certification. The Knowledge Areas of Technician Expertise (KATE’s) are outlines of the information covered in each exam. They should be used as reference material while preparing for the NATE exams as they represent the technician’s knowledge, skills and abilities.

Willful violations of the KATE’s can be grounds for suspension or revocation of NATE certification.

NATE's goal is to make exams easily 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, soft skills, heat transfer, comfort, and electrical.

Specialty exam

The specialty exams cover the following topics: installation, service, system components and applied knowledge.

NATE's Specialty Exams are:

- 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. Currently a service exam earns the technician an install certification in the chosen specialty.

Note: Technicians earning the Heat Pump certification are awarded Air Conditioning certification.

Senior technician

This technician must already have two NATE certifications, one in heating and one in cooling. This test is designed for the highest level senior technician. This test for certification is not intended for the HVAC system designer, sales force, or the engineering community.

As a pre-requisite to sit for the HVAC Efficiency Analyst exam, the candidate shall hold two (2) certifications by NATE in Service Sector Specialties as follows:

- Air Conditioning (AC) plus one of the following: AD, GS, OL, HG, or HO
- Air Distribution (AD) plus one of the following: AC, GS, HP, OL, HG, or HO
- Gas Heating (GS) plus one of the following: AC, AD, or HP
- Heat Pump (HP) plus one of the following: AD, GS, OL, HG, or HO
- Oil Heating (OL) plus one of the following: AC, AD, HP, HG, or HO
- Hydronics Gas (HG) plus one of the following: AC, AD, or HP
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 of their field. Both knowledge and experience 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 and includes contractors, 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:** one year of field experience as an installation technician
- **Service Technician:** two years of field experience as a service technician
- **Senior Technician:** five years of field experience as a service technician

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). You will also receive results at the mailing address you provided.

Passing NATE exams

When you have earned NATE certification by meeting the exam requirements for 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.

Note: Technicians earning the Heat Pump certification are awarded Air Conditioning certification.
Failing NATE exams

If you fail the core or specialty test, certification is not awarded until you successfully retake the test you failed. Failed tests may not be retaken for 30 days from the original test date to give you time for further study and review.

Candidates must complete certification requirements within two years. If one exam and the corresponding exam are not passed, the failed exam needs to be successfully passed within two years. If certification is not achieved within the two year time frame, all passed exams will expire.

**Note:** Ground Source Heat Pump certification candidates are not required to take the core exam.

Veterans Information

The Veterans Administration (VA) provides a stipend of up to $2000 per test but not more than the actual cost of the test. Failed tests are 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 the 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 notify the Testing Organization and proctor in advance so accommodations can be made.

Recertification

**Recertification is a requirement.** Knowledge in the HVAC/R Industry changes constantly such as new SEER requirements, new refrigerants, new codes, and new standards. These changes plus advancements in engineering require you to constantly update your knowledge and information about the industry. That’s why it is required for today’s successful technician to recertify.

When to recertify

NATE requires recertification every five years, depending upon your specialty. Currently GSHP is three years. Please check the KATEs for verification of recertification requirements.

**Note all the KATEs have the recertification requirements on the opening page.**
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.

All 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 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

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.

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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.

Recognized Provider Program

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

These NATE-Recognized Providers align their classes to the KATEs. Click here to find your local recognized providers.

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. Click here to see a sample of a Certificate of Completion

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 record 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 of one of the items above. 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 required exams. If the candidate request the exams will be reviewed as stated above following the Formal Review policy
- 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.

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

**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.