

## NATE Testing Portal

#### Guide to using the myNATE website

## Login



• Go to <u>www.myNATE.org</u>. 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 C	onnect			
First Time User?	Returning User?			
Enter your user	name and password.			
Username				
sample				
Password				
•••••				
Sign In Lost/F	Forgotten Password?			

# Online Testing - Creating a Testing Session

 Once you have logged in go to the testing sessions tab. To create a new session, click the plus sign in the upper right hand corner of your "My Testing Sessions" window.

My	Testing Sessions	0								+	
										Create	Testing Sessio
f	filter testing session	S								<b>X</b> Go!	
		Limit Search	n to:	Туре	Location	Testing Organization	All Columns				
		Start D	ate:	07/08/2	2014	× #	End Dat	te:	× 🗎		
Test	t Time	Туре	Roste.	Loca	tion	Testing Organiza	tion		Action	۲	
Tot	tal Items: 0							Page Size: 10	▼ I< < 1	► ►I	

# Online Testing - Creating a Testing Session



 The next window will ask you to select your testing organization. If you are a proctor for multiple testing organizations, they will all be listed here. Click the select

button.

	Select Provide	er								×
	filter testing or	ganizations							3	K Go!
	Limit Search to:	Organization N	lame	Organization Type	Primary	/ Contact	All Columns			
	Organization N	lame	Orgai	nization Type	Prim	ary Conta	ct	Actions		۲
	North American	Technician Ex	Trade	Association	Tony	Spagnoli		Select		
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	Total Items: 1					Page Si	ze: 10	• • •	1	
L						-				
L										
L										0
										Cancel

# Online Testing - Creating a Test Session



- The next window will ask you for general information about your test session. Certain choices will change what information is requested.
- Session Type Online
- Session Time Select a date and time for the session. This is the date/time you plan on starting the session. Online exams will be available 24 hours prior and after this scheduled time.

# Online Testing - Creating a Test Session



- Select Proctor If you are creating the session through your proctor login, you should see your name here. If you are a testing organization contact, you can select any proctor from your testing organization.
- Select Location You can select where the test session is being held if you testing organization has registered multiple locations. This field does not affect the online testing process. If no other options exist, you can select "Main."

# Online Testing - Creating a Testing Session

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Editor	×
Session Type	
Internet	•
Session Time	
02/26/2015 1:10 PM	Ê
Proctor	
Select a Proctor filter proctors Tony Spagnoli (aspagnoli) Alex Rodriguez (arodriguez) Valerie Briggs (vbriggs) Location Main (Arlington)	
Cancel Sa	ave



 The next step to submit your test session is to create the roster. First, click the "Manage Roster" button.

My Testing Sessions	9 9								+
filter testing session	ns								X Go!
	Limit Searc	h to:	Туре	Location	Testing Organization	All Columns			
	Start D	Date:	07/08/2	2014	× 🗎	End Da	ite:	× 🗎	
Test Time	Туре	Roste.	Loca	tion	Testing Organiza	ation		Action	
07/31/2014 11:00 am	IBT	0	Main		North American Te	echnician Excellenc	ce (1587)		1 🔸
								Manage Roste	
								10 • • • • 1	



 Once the "Roster Management" window opens, click "Add Technician" to add a new technician to your roster.

Roster Management	:		×
Location:	Main		Add Technician
Test Time:	07/31/2014 11:00 am		
Proctored by:	Tony Spagnoli		
Technician	NATE ID	Examination	Action 💌
Total Items: 0		Page Size: 10	
			Close

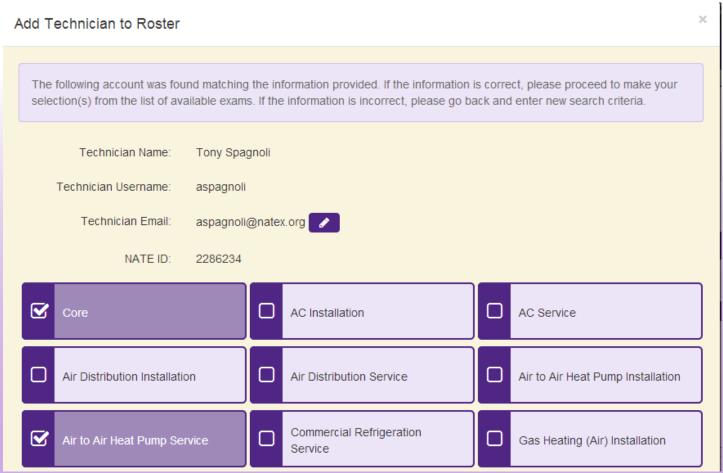


 You can then enter either the NATE ID number or email address for the technician. If the technician has tested before, the NATE ID number is the best choice for making sure a duplicate record is not created.

/	Add Technician to Roster		×
	Please enter the technician's N/	TE ID or email address below and the system will try to locate their account.	
	NATE ID:	2286234	
	Email Address:	Technician's email address	
		Cancel Find Technician Q	



 In this first example, searching the NATE ID located a record. You can then review the email address for accuracy and select which exams that technician needs.





 If this is the technician's first exam, enter their email address and click find technician.

Add Technician to Roster		×
Please enter the technician's NA	TE ID or email address below and the system will try to locate their account.	
NATE ID:	Technician's NATE ID	
Email Address:	newtech@natex.org	
	Cancel Find Technician C	٩



 If it doesn't find anyone in the system with that email address, it will have you create a new record by entering the technician's first and last name. Please note: you will not be able to edit the name once created. Please double check the spelling.

Technician		×
Unable to find a technician match to the system.	ing the information that was entered. Please enter the information below to add this technician	
First	New	]
Last	Technician	]
Email	newtech@natex.org	]
	Close Create Technician	n



- After you have created the new technician's record, select the needed exams.
- Repeat this process until all candidates have been added.
- You can review every technician and every exam in the roster management window.
- Once all technicians have been added to your roster, you can close the roster management window.



Roster Management			×
	Main 07/31/2014 11:00 am Tony Spagnoli		Add Technician
Technician	NATE ID	Examination	Action
New Technician		Core	
New Technician		AC Installation	<b>D</b>
New Technician		AC Service	<b>D</b>
Tony Spagnoli	2286234	Air to Air Heat Pump Service	<b>D</b>
Tony Spagnoli	2286234	Core	
Total Items: 5		Page Size: 10	
			Close

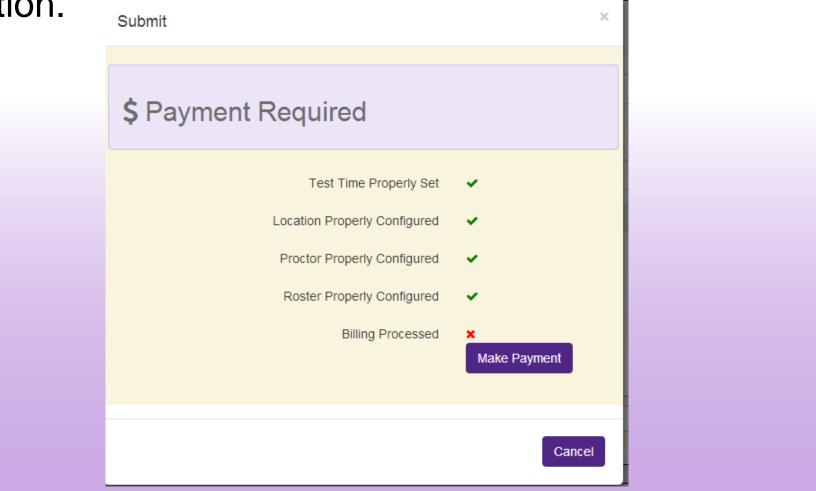


 The final step to creating the test session is to submit the session. To do this, click the "Submit Testing Session" button in the "My Testing Sessions" window.

My Testing Sessions	0										+
filter testing sessior	IS										<b>X</b> Go!
	Limit Searc	h to:	Туре	Location	Те	sting Organization	All Columns				
	Start D	Date:	07/08/2	2014		× 🛗	End Da	ate:		×	
Test Time	Туре	Roste	. Loca	tion		Testing Organiza	tion			Action	۲
07/31/2014 11:00 am	IBT	5	Main			North American Te	chnician Excellen	nce (1	587)	2	
											Submit Testi
Total Items: 1								Pa	age Size: 10	▼  ∢ ∢ 1	



• The site then checks to make sure the date, time, location, and roster have been configured correctly. You will then need to select a payment option.





- You can then choose to select to pay by Invoice/Purchase
   Order or pay up front with a credit card.
- If your organization wants to be invoiced but does not use purchase order numbers, please enter "None" or "N/A."
- As before, NATE will only bill you for used exams. If a candidate is a no-show for an online exam, you will not be charged.



1 Invoice 2 Payment 3 Ver	rification 🔰 🕘 Confirmation	on	
ayment for the following items is required in order t	o proceed:		
Item	Quantity	Unit Price	Pric
Air to Air Heat Pump Service	1	\$120.00	\$120.0
Core	2	\$120.00	\$240.0
AC Installation	1	\$120.00	\$120.0
AC Service	1	\$120.00	\$120.0
		Total:	\$600.0
lease choose a payment method below to proceed.			
you are not paying with a credit card, click the Pure	chase Order button and enter the	PO number.	
	B Pay by	/ purchase order 🛛 🚍 Pa	ay by credit car



Payment

Circl Manage	ion			
First Name		Last Name	_	
Credit Card Number			AMIRICAN EXPRESS	
Choose	Choose	•	CVV Code	
Exp. Month	Exp. Year			
Billing Information				
Street Address				
		State	Zip Code	



Payment	2
Invoice Payment Verification 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  Carter State S	

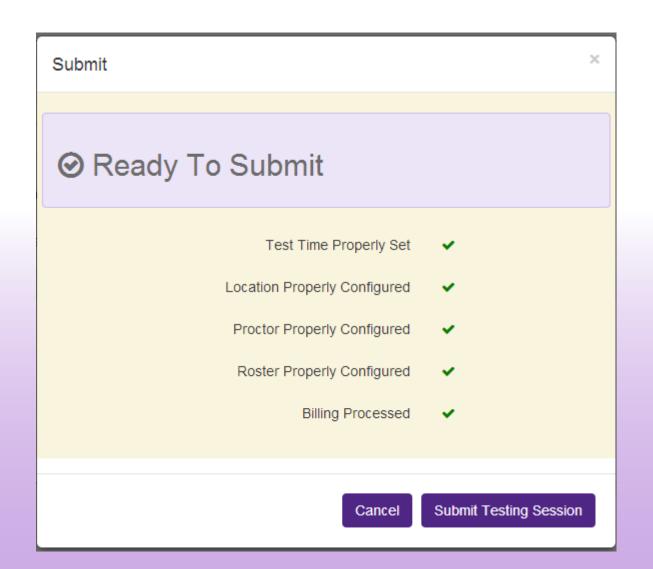


 Once the payment has been confirmed, you will be able to go back to the checklist and submit your session.

Р	rment	×
	1 Invoice 2 Payment 3 Verification 4 Confirmation	
	our payment was successfully processed.	Continue

- Click the Submit Testing Session.
- At this point the session has been created.
- If you are within 24 hours of the start time of the session, it is now available on the PASS site.

WG THE FINEST



## Online Testing - Review Test Sessions



- Once a test session has been submitted, you can review the roster by click the manage roster button again.
- NATE ID numbers have been assigned to new candidates.

Roster Management											
	Submitted										
Location:	Main Add Walk-In										
Test Time:	07/31/2014 11:00 am			_							
Proctored by:	Tony Spagnoli										
Technician	NATE ID	Examination	Status	۲							
New Technician	8402640	Core	Success								
New Technician	8402640	AC Installation	Success								
New Technician	8402640	AC Service	Success								
Tony Spagnoli	2286234	Air to Air Heat Pump Service	Success								
Tony Spagnoli	2286234	Core	Success								
Total Items: 5		Page Size: 10	▼ I4 4 1 ►								
Fotor Remo. o											
				Close							

# Online Testing - Adding a Walk-In



- You can add walk-ins for online testing. You can do that by clicking on the "Add Walk-In" button and following the same steps as adding a technician to a roster.
- You will also need to go through the payment portion for each walk-in added. You will follow the same steps as the payment portion for submitting the exams.
- If you do not complete the walk-in process, the technician will still be added to the roster as pending.
- You can complete the process by clicking the submit button or the trash can to delete.

# Online Testing - Adding a Walk-In Cont.



		Submitted					
Location: Main Add Walk-In							
Test Time: 07	7/31/2014 11:00 am						
Proctored by: To	ony Spagnoli						
echnician	NATE ID	Examination	Status	0			
ew Technician	8402640	Core	Success				
ew Technician	8402640	AC Installation	Success				
ew Technician	8402640	AC Service	Success				
ony Spagnoli	2286234	Air Distribution Service	Pending 🛍 🔸				
ony Spagnoli	2286234	Air to Air Heat Pump Service	Success				
ony Spagnoli	2286234	Core	Success				
Total Items: 6		Page Size: 10	▼ I< < 1 ►				

# Online Testing - Technician Email



- Technicians in your session receive an email immediately after the session has been submitted.
- This email contains their exam codes. These codes can be used for two purposes:
  - For online exams, this code is required to start that particular exam
  - This code is used for first time technicians to create their myNATE logins.

#### Technician Email Cont.



#### Tue 7/8/2014 11:30 AM

Castle Connect <connect@castleworldwide.com>

My NATE Test Session Notification

To Spagnoli, Anthony

If there are problems with how this message is displayed, click here to view it in a web browser. Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Date: 7/8/2014 To: Tony Spagnoli From: This is the My NATE website

Bring this paper to the exam. We have confirmed the following examination request: Your examination date is: 7/31/2014 Your reporting time is: 10:45 AM

Examination	Password
Air to Air Heat Pump Service	a34c405d673c
Core	88f6d8c078ed

#### Paper and Pencil Test Sessions

## Activation Code Recovery



- If a technician does not bring the activation code with them to the session, you as the proctor can retrieve it.
- To retrieve the activation code, click your "Reports" tab on your myNATE page, and select the "Proctor PASS Candidate Credentials" from the drop down menu. This report will list all activation codes for all candidates in active test sessions.
- Candidates with existing myNATE logins can also retrieve their activation codes by checking their "myNATE Inbox." This is done by clicking the golden envelope next to their profile button on the myNATE site.

### Activation Code Recovery Cont.

AND THE CHANGE AND TH	My NATE									🖂 🚢 🏟 😧 🛛 Tony 🔀 Log Out				
CRAILE .	Home	Reports	LIbrary	то	Testing Sessions	RTP	Training	Application	C3	Users	Test Organization	PASS		
	Order Pa	aper Exams												
Reports	Reports													
Report: Proctor PASS Candidate Credentials •														

#### **PASS Candidate Credentials**

First	Last	NATE ID	Exam Name	Date	Status	Password
Tony	Spagnoli	2286234	Air to Air Heat Pump Service (HPSV)	4/29/2015	Scheduled	53f1b11c3b10
Tony	Spagnoli	2286234	CORE	4/29/2015	Scheduled	4ea350fb1aa5

Executed: 4/29/2015 10:31:42 AM

Executed By: aspagnoli

THON THE CAN TECHNICIAN.

## Proctoring the Session – Online Testing



- First, you will want to go to your PASS tab on your myNATE page.
- If this is your first time at this tab, it will have you agree to the terms of use for the PASS site.
- Once you agree to the terms, you will be able to see your login for the PASS site. Please note: this log in is different than your login for the myNATE site.
- There will be a direct link to the PASS site they will open in a new tab. This makes it easy to copy and paste your login to the new window.

## Proctoring the Session - Online Cont.



AND THE ANTECHNICAN CHART	My NATE								🖂 🚢 🏟 😧 🛛 Tony 🔀 Log Out				
ETT NACTHEFT ALL	Home	Reports	LIbrary	Test Organization	Testing Sessions	RTP	PASS	Application	C3	то	Training	Users	
PASS Proctor I These are your F credentials. User ID: nate_230 Password: Click this link to g	PASS Proc 67943550	tor											

## Proctoring the Session - Online Cont.



- Once at the PASS site, you will want to run the requirements test to make sure your computer and browser are configured properly to use the site.
- Things like an updated browser, cookies enabled, JavaScript enable, and so on are necessary for the site to run.
- All of these items are free downloads which you likely already have installed on your computer.

### Proctoring the Session – Online Cont.



Castle Wor Design. Develo		PASS Proctored Assessment System
Proctor Login Requirements Participant Handbook Candidate Comments Form	System Requirements Tou have not tested your computer yet. Click here to test now.	English ▼
	Your browser must allow popup windows from Castle's site. Passed	

# Changing Your Username/Password



- You are able to change your username and password on the PASS site once you have logged on.
- Click the "Security Maintenance" link on the left hand side of the screen.
- You can then change your password, set a security question, and change your username.

### Change Username/Password Cont.

Castle Wo Design. Develo		PASS Proctored Assessment System
octor <u>Iome</u> <u>Requirements</u> <u>Surveys</u> rregularity Report <u>Security</u> <u>Maintenance</u> <u>.ogout</u> (Tony Spagnoli)	Security Maintenance   From this page, you can create or modify your existing security question and response or update your password or update your username.   If you were redirected here upon login, it means that your password has expired and should be updated.   Current Password   New Password   Confirm Password   Update Password   Security Question   Please select a security question   Please select a security question   Security Response   Can not be blank.   Update Security Question   Rurrent Username   aspagnoli   New Username	English ▼





- After you login you will see a page asking you if you want to enable Castle Lockdown (only available on Internet Explorer). This locks your computer to only this browser window.
- NATE does not require Castle Lockdown. You do not need to select to have it enabled.
- If you have an active session, you will be able to click the continue button to begin the session.

**Castle Worldwide** 

Design, Develop, Deliver



PASS

Proctored Assessment System

If no session is scheduled

### If a session is scheduled

Proctor Home Requirements Surveys Irregularity Report Security Maintenance Logout (Tony Spagnoli)	Proctor Home Welcome Tony Spagnoli. You are logged into Castle's PASS. You must use Internet Explorer to use Castle Lockdown. You are not scheduled to proctor any exams at this time. Continue	English  Forgotten Candidate Password Request Demo Password
Castle Wor Design. Develo		PASS Proctored Assessment System
Proctor Home Requirements Surveys Irregularity Report Security Maintenance Logout (Tony Spagnoli)	Proctor Home Welcome Tony Spagnoli. You are logged into Castle's PASS. You must use Internet Explorer to use Castle Lockdown. To administer an exam, press the continue button. Continue	English  Forgotten Candidate Password Request Demo Password
		For support call (877) 420-6283

## Proctoring the Session Cont.



- You will need to select the candidate's name from the drop down menu.
- Only candidates registered for your session or other sessions at your testing organization will be visible here.
- Please verify the candidate's photo ID.
- You will then need to agree to the different attestations on the screen before continuing.



### **Proctor Instructions**

#### Before the examination begins:

Verify the candidate's valid photo identification with signature.

### Candidate Name:

USER, DEMO - CITY NAME, NC V

### Registered For:

Demo

### ID Type:

Drivers License

### State or Province on ID:

VA

✓ I have placed the candidate's personal belongings in a secure location outside the examination room.

**v** |

- Verify that the candidate does not have a cell phone or any other unauthorized aid with him/her.
- I will supervise the candidate at all times by being in the room, watching through a window, and/or by watching the video monitor.
- At the conclusion of the exam, I will print the candidate's results page AND VERIFY that the candidate receives the correct results.

As proctor, by clicking the checkbox, I attest that I have performed, and will perform, the duties listed on this page and/or the duties in the Proctor Manual as I assist this candidate with his/her examination today.

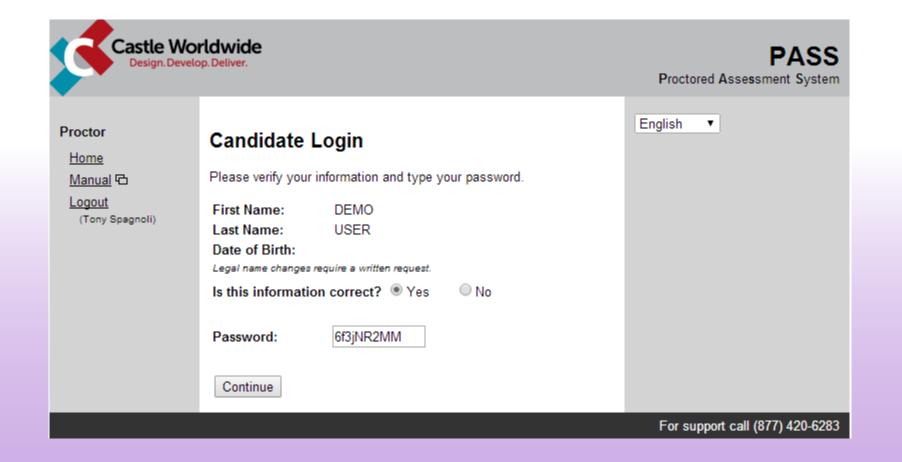
Click to check the box if you agree: 🗹

Continue



- The candidate would then use their activation code to login.
- Please have them verify their information or correct it if anything is wrong. Please note: If there is something wrong with their name, please contact NATE.
- Please note that the passwords are case-sensitive.







- The candidate will then agree to several attestations as well.
- At the bottom of the page the candidate will need to type "I attest" in order to continue.
- Once the candidate has checked off all of the boxes and typed in "I attest."

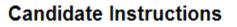
Ρ



Proctor Home	Candidate Attestation	English <b>•</b>
Manual 🗠	On my honor, I attest:	
(Tony Spagnoli)	I will not give any unauthorized assistance on this exam.	
(,	I will not receive any unauthorized assistance on this exam.	
	I will not remove any items from the testing center.	
	<ul> <li>I have turned over the following items to the proctor:</li> <li>cameras, cell phones, optical readers, or other electronic devices that include the ability to photograph, photocopy or otherwise copy test materials</li> <li>notes, books, dictionaries or language dictionaries</li> <li>book bags, purses, handbags or luggage</li> <li>ipods, mp3 players, headphones, or pagers</li> <li>calculators (except as expressly permitted by the test sponsor), computers, pdas, or other electronic devices with one or more memories</li> <li>personal writing utensils (i.e., pencils, pens, and highlighters)</li> <li>watches</li> <li>food and beverage</li> <li>hats, hoods, or other headgear</li> </ul> I will alert the proctor immediately if I have any concerns about the test administration, including if the testing environment becomes unacceptable to me, or if I have any concerns about the testing computer. Please type "I attest" to confirm that you have attested to the above items: lattest Continue	



 The next screen will ask if the candidate wants to start the exam or see the demo. The demo just shows the technician how to use the online testing platform, these are not NATE practice exam questions. The demo is not required.



Please take a few minutes to review this demo before proceeding to your regular examination.

I want to see the demo.

The time you spend on this demo does not count against the total amount of time you have available to take your regular test.

If you choose to view the demo after you have begun the test, the exam timer will continue to run.





- The next screen allows the candidate to launch the exam. A message may pop up letting you know the browser window you are currently in will be closing. Please click "Yes" and allow the window to close. The exam opens in a new window.
- Having the exam open in multiple windows will cause an error to occur and will not allow the technician to continue.



### Launch Exam



Note: The following test will be administered in a separate window without toolbars.

As the current window is closed, some browsers may ask you to confirm this closing.

If your browser asks you to confirm closing a window, please click " Yes " to proceed.

Take the test



- The candidate is now taking the exam. There are many different tools they can use:
  - First Question, Previous Questions, Next Question, Last Question, Go To: These are the navigational tools. The technician will not have a back button or forward button to use on the browser.
  - <-Flag, Flag, Flag ->: These buttons allow the candidate to mark questions for later review. The middle flag button allows the technician to flag and unflag the question. The other two will take the technician to the previous or next flagged question
  - Timer: Shows the remaining time left for the exam. Can be hidden.
  - Unanswered, Answered, Flagged: Counters that the technician use to keep track of their progress on the exam.
  - Help: Guidance on how to use the site. Please note: the time will NOT stop while help is opened.



Submit Exam



 Some questions will have attachments that need to be viewed. Clicking the "Attachment 1" link will open the attachment in a separate window. When finished with the attachment, the technician can close that window.

# Proctoring the Online Session – Cont.



$ \begin{array}{c c c c c c c c c c c c c c c c c c c $								
llowing conditions is presented in the attached figure? Ifraction	Attachment 1 💌	Attachments Attachment 1						
Answered: 2 Flagged: 0								



- The candidate can click the "Submit Exam" button when they are finished. Please note: The exam will submit automatically if time expires.
- It will then bring them to a screen with the summary of the exam. It will tell them how many unanswered questions they have left (if any) and how many flagged questions they have left (if any).
- If the candidate still has time left on the exam, there is a button to bring them back to the exam, or individual question buttons for any flagged or unanswered questions, that will bring the candidate back to that question.
- Once they are truly done, the candidate needs to write "I understand" in the box at the bottom and click "Yes, End the Exam Now"



English • Do you want to end your exam now?

- You left the following questions unanswered. If you end your exam now, you lose the chance to answer these questions.
- You marked the following questions for later review. If you end your exam now, you lose the chance to review these marked questions.
- · You still have time remaining.

No, Return to the Exam

• If you end your exam now, you cannot return to the exam.

If you are ready to end the multiple-choice exam now, type the words 'I understand' in the box below.

l understand

Yes, End the Exam Now



- The final screen the candidates will see is their results screen.
- This screen will let them know if they passed or failed the exam.
- NATE does not give out scores; all exams are pass/fail
- Candidates that fail the exam will have a more detailed score report available on myNATE.

### **Technician Activation**



- After the technician receives their email, they can create their myNATE login at any time. Technicians with existing myNATE logins do not need to create a new account; all of their information was imported.
- The technician will want to go to <u>www.myNATE.org</u>, 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.

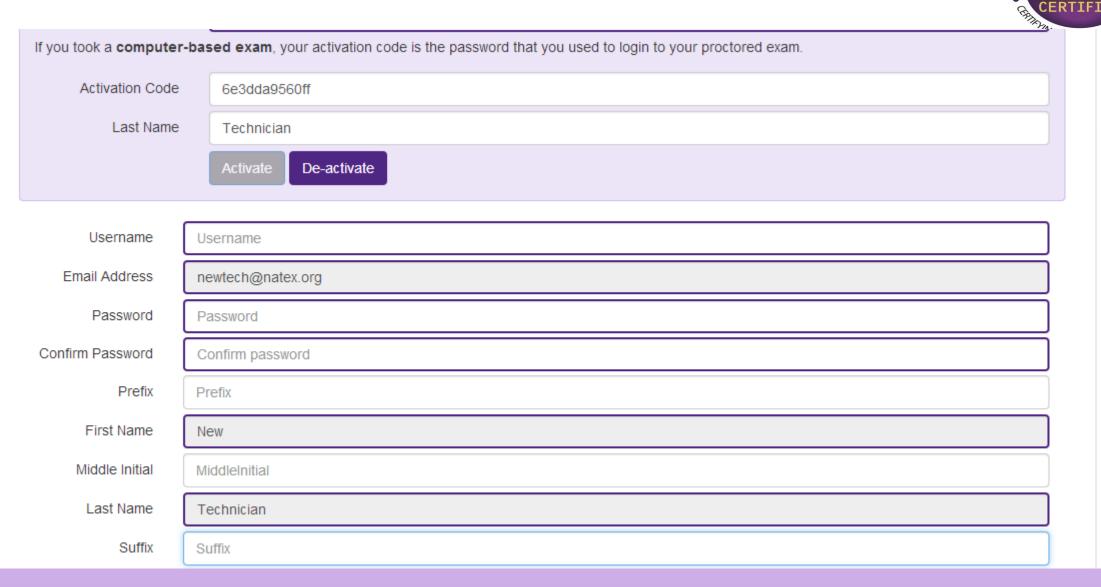
### **Technician Activation**



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 <b>activation code</b> to request an account.							
Activation Type	Computer based exam						
If you took a <b>computer-based exam</b> , your activation code is the password that you used to login to your proctored exam.							
Activation Code	6e3dda9560ff						
Last Name	Technician						
	Activate						
Username	Jsername						
Email Address	Email address						
Password	Password						

### Technician Activation Cont.

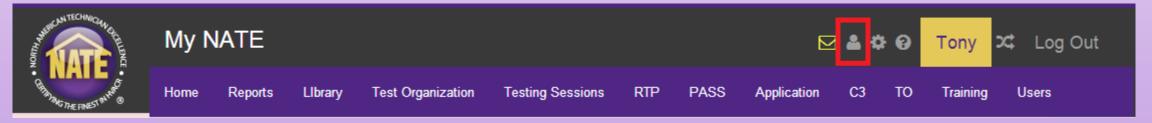
SHERICAN TECHNICIAN,



### **Technician Profile**



- In order for technicians to receive their e-certificates, NATE needs a unique email address.
- In order to send out patch packets to the technicians, NATE needs their mailing address.
- To add or update any of their contact information, a technician can log into myNATE and 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 technicians can view results, manage their certifications, and track their CEHs on myNATE. They need to provide an email address to receive their e-certificate. The need to provide their mailing address to receive their patches.
- If technicians have any difficulty creating their myNATE logins, they can contact NATE customer support (<u>askNATE@natex.org</u> or 877-420-6283)

### Additional Information



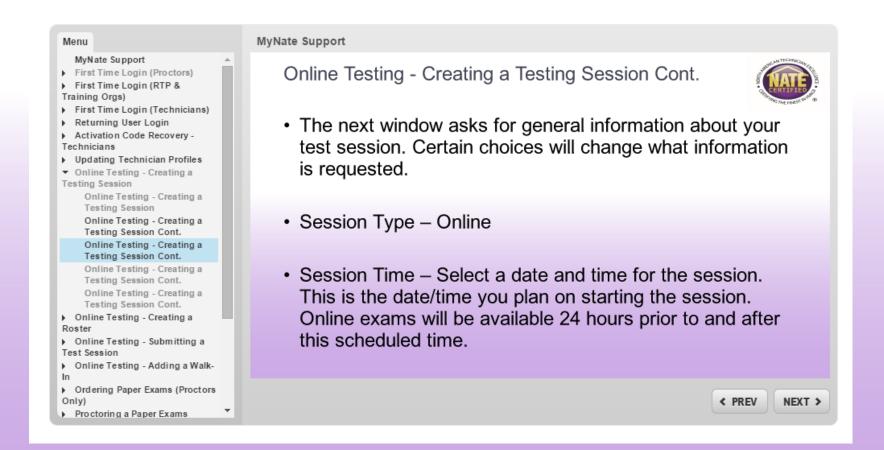
- If you have any questions about the testing process, you can access a help feature on the myNATE site directly.
- You can click on the "?" icon on your Testing Session or Paper and Pencil Orders window to open up the help menu.

My Testing Sessions	0			-									+
filter testing session	ns										×	Go!	
Limit Search to:				Location	Testing Orga	nization	All Columns						
	Start [	Date:	04/29/20	015	×		End Date	:		•	: 🛗		
Test Time	Туре	Roster.	Locat	ion	Testing	Organizat	ion			Action			۲
04/29/2015 10:35 am	IBT	2	Main		North Am	North American Technician Excellence (1587)			*		*		

### Additional Information Cont.



• The following will open on your page after clicking that question mark icon:



### Additional Information Cont.



 As always, if you have difficulty with proctoring a session or have questions, please contact the NATE customer service line at 877-420-6283 or <u>askNATE@natex.org</u>.