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.

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.

Paper Exams – Ordering Paper Exams

- 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.

My Paper and Pencil Orders					**+**
					Create Testing Session

| filter testing sessions | | | | **✕** | **Go!** |

Start Date: [ ] ✕ 📅   End Date: [ ] ✕ 📅

Date Needed	Status	Number Of Tests	Testing Organization	Action
03/31/2015 10:30 am	Approved	0	North American Technician Excellence (1587)	👁 🗑 ➤
04/01/2015 10:40 am	Approved	1	North American Technician Excellence (1587)	👁 🗑 ➤
04/01/2015 10:35 am	Approved	205	North American Technician Excellence (1587)	👁 🗑 ➤

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.

Paper Exams – Exam Quantity

Available Exams

There are 17 available exam(s)

Amount	Name
25	Core
5	AC Installation
5	AC Service
	Air Distribution Installation
	Air Distribution Service
	Air to Air Heat Pump Installation
5	Air to Air Heat Pump Service
	Commercial Refrigeration Service
5	Gas Heating (Air) Installation
5	Gas Heating (Air) Service
	Hydronics Gas Service
	Hydronics Oil Service
	Light Commercial Refrigeration Service
	Oil Heating (Air) Service
	Senior Level Efficiency Analyst
	Industry Competency Exam (ICE) - Commercial Refrigeration
	Industry Competency Exam (ICE) - Light Commercial Air Conditioning and Heating
50	Total Exam(s)

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.

Paper Exam – Dates Cont.

- You can use the calendar button at the end of the field, which will bring up a interactive calendar to chose the date.

Tentative Test Date

Please allow up to 8 business days for delivery

I need the exams delivered by

Tentative Test Date

Please allow up to 8 business days

I need the exams delivered by

Proctor

Tony Spagnoli (aspagnoli)

Location

Main (Arlington)

‹		February 2015			›	
Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
1	2	3	4	5	6	7

02 : 01 PM

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."

Proctor

Tony Spagnoli (aspagnoli)

Location

Main (Arlington)

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

View/Edit Order

Date Needed	Status	Number Of Tests	Testing Organization	Action
04/21/2015 12:00 am	New	50	North American Technician Excellence (1587)	👁 🗑 ✈

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.

Submit Paper and Pencil Order ✕

$ Payment Required

Test Time Properly Set ✔

Date Needed Properly Set ✔

Location Properly Configured ✔

Roster Properly Configured ✔

Billing Processed ✘

Make Payment

Cancel

Paper Exams - Submitting the Order

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
Air to Air Heat Pump Service	1	$120.00	$120.00
Core	2	$120.00	$240.00
AC Installation	1	$120.00	$120.00
AC Service	1	$120.00	$120.00
		Total:	$600.00

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

Paper Exams - Submitting the Order

Paper Exams - Submitting the Order

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.
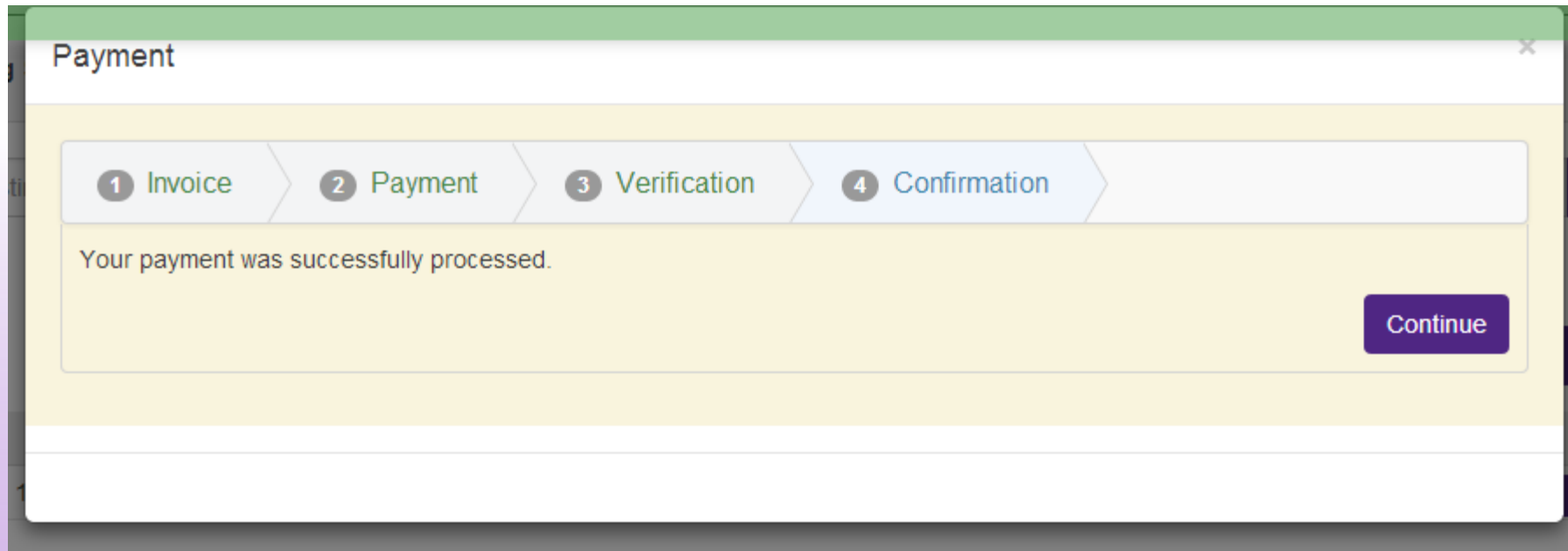
- Click the PnP Order Submit button.

- 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   ×

⊘ Ready To Submit

Test Time Properly Set   ✔

Date Needed Properly Set   ✔

Location Properly Configured   ✔

Roster Properly Configured   ✔

Billing Processed   ✔

Cancel   PnP Order Submit

North American Technician Excellence (1587)

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	6e3dda9560ff
Last Name	Technician

Activate

Username	Username
Email Address	Email address
Password	Password

Technician Activation Cont.

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

Activation Code	6e3dda9560ff
Last Name	Technician

Activate   De-activate

|	
Username	Username
Email Address	newtech@natex.org
Password	Password
Confirm Password	Confirm password
Prefix	Prefix
First Name	New
Middle Initial	MiddleInitial
Last Name	Technician
Suffix	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.
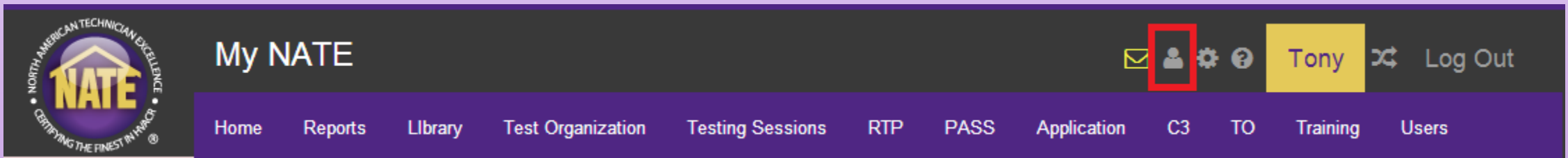
- Please reinforce during your sessions that if technicians can view results, manage their certifications, and tracking their CEH on myNATE.

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