



# A GUIDE FOR RECOGNIZED TRAINING PROVIDERS (RTPs)

How To Use the myNATE Website





## INTRODUCTION

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Thank you for your support of the NATE certification program, and for teaching others to excel. This guide will address:

1. myNATE account activation
2. Course registration
3. Submitting rosters
4. Adding instructors
5. Course renewal

# USER LOGIN



- Go to [www.myNATE.org](http://www.myNATE.org). Log in with your myNATE username and password, or create an account using the activation information contained in your approval email.

A screenshot of a web login form titled "Sign in to Castle Connect". The form has a purple header bar with the title. Below the header, there are two tabs: "First Time User?" and "Returning User?". The "Returning User?" tab is selected and highlighted in yellow. The main content area contains the text "Enter your username and password." followed by two input fields. The first field is labeled "Username" and contains the text "sample". The second field is labeled "Password" and contains a series of dots. At the bottom of the form, there are two buttons: a purple "Sign In" button and a purple button with the text "[Lost/Forgotten Password?](#)".



- Select the “RTP” tab to access the RTP section of the website.
- The course viewer will display first after clicking the RTP tab. 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 your courses, course statuses, and course expiration dates.
- To view more detailed information about a course, 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 CONTINUED



**RTP Administrator Management**

RTP Selector: North American Technician Excellence (1587)

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

[Add Training](#)

Sample  [x](#) [Search](#)

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
	Sample Course	Sample	Rejected	9/3/2014	<a href="#">✎</a>
1587-0060	Sample Course	Sample description	Expired	11/18/2016	<a href="#">🔍</a> <a href="#">🗑️</a>
1587-0061	Sample Course	Sample description	Approved	11/28/2020	<a href="#">🔍</a>

Total Items: 3 (Showing: 3) Page Size: 10 [⏪](#) [⏩](#) 1 [⏪](#) [⏩](#)

# SUBMITTING A NEW COURSE

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- To submit a new course, click the “Add Training” button on the “Course Viewer” page.
- This will open up the training editor. Please complete the following fields:
  - Title
  - Description
  - Credit Measurement Unit
  - Training Category



# SUBMITTING A NEW COURSE CONTINUED



- 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.
- Select all specialties that are relevant to your course.
- Enter the course length in hours in the box to the right of each specialty.

The screenshot shows the 'Training Editor' interface with the following fields and sections:

- 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:** A list of specialties including Air Distribution Installation, Air Distribution Service, Commercial Refrigeration, Efficiency Analyst Senior, Gas Heating (Air), Gas Heating (Air) Service, Ground Source Heat, and HVAC Performance.
- Associated Specialties & Units:** A table showing associated specialties and their corresponding units.

Associated Specialties & Units	Units
Air Conditioning Installation	4
Air Conditioning Service	4
Air to Air Heat Pump Installation	4
Air to Air Heat Pump Service	4

Buttons: Cancel, Continue

# SUBMITTING A NEW COURSE CONTINUED



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

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.

# SUBMITTING A NEW COURSE CONTINUED



- 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”.

**From:** Castle Connect <connect@castleworldwide.com>  
**Sent:** Monday, May 20, 2019 9:50 AM  
**To:** Spagnoli, Anthony <aspagnoli@natex.org>  
**Subject:** My NATE Training Submittal Decision Notification

**Date:** 5/20/2019  
**To:** Tony Spagnoli  
**From:** This is the My NATE website

Your Training submittal, "Sample Course", has been reviewed by an Administrator for My NATE.

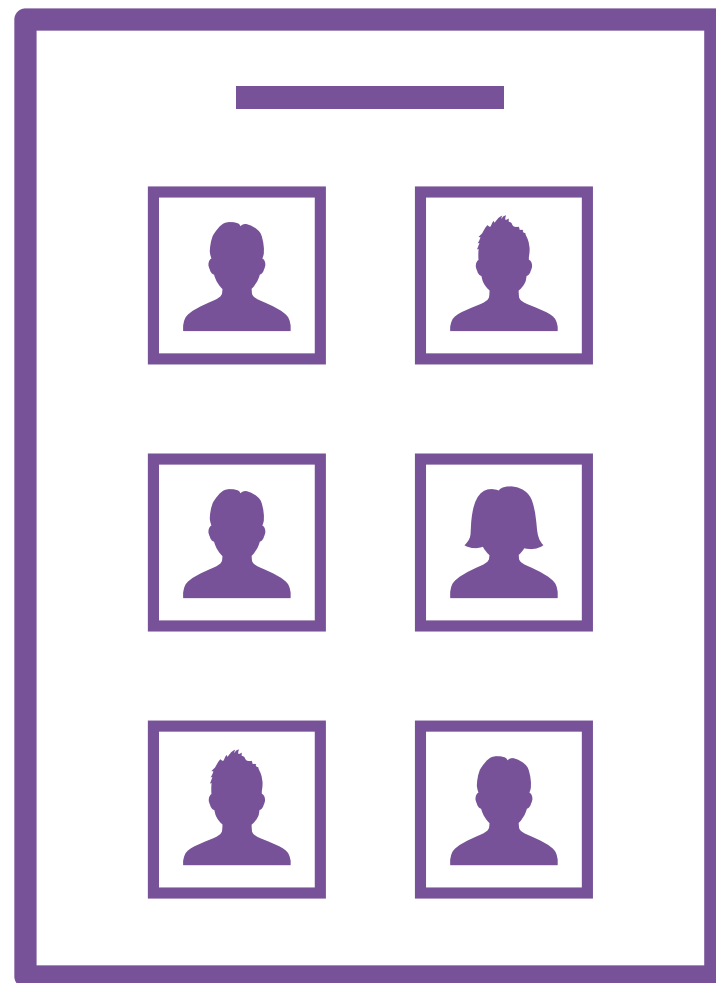
The new status is: Approved

For additional details and available actions, go to the Training Administration area of the My NATE site.



- You will receive an email when the course is approved or rejected.

# SUBMITTING A CLASS ROSTER



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

# SUBMITTING A CLASS ROSTER CONTINUED



**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
	In-house Safety Training	13	04/24/2018	04/24/2018	YANKTON, SD
	In-house Safety Training	13	05/01/2018	05/01/2018	YANKTON, SD
	In-house Safety Training	13	05/08/2018	05/08/2018	YANKTON, SD
	In-house Safety Training	13	05/22/2018	05/22/2018	YANKTON, SD
	In-house Safety Training	13	05/29/2018	05/29/2018	YANKTON, SD
	In-house Safety Training	13	06/19/2018	06/19/2018	YANKTON, SD
	In-house Safety Training	13	07/05/2018	07/05/2018	YANKTON, SD
	In-house Safety Training	13	07/26/2018	07/26/2018	YANKTON, SD
	In-house Safety Training	13	09/04/2018	09/04/2018	YANKTON, SD
	In-house Safety Training	13	09/18/2018	09/18/2018	YANKTON, SD

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# SUBMITTING A CLASS ROSTER CONTINUED



The screenshot shows the Microsoft Excel interface with the 'HOME' tab selected. The ribbon includes options for Clipboard, Font, Alignment, and Number. The active cell is C6. The spreadsheet contains the following data:

	A	B	C	D	E	F	G	H	I	J
1	NATE ID	First Name	Last Name							
2	2286234	Tony	Spagnoli							
3	8842391	Jane	Doe							
4										
5										
6										

# SUBMITTING A CLASS ROSTER CONTINUED



- 1 Next, click the “Upload Roster” button under the “Submitted Course Hours” tab.
- 2 Select the course for which you are uploading the roster from the drop down menu under “Training.”
- 3 Enter the start date and end date of your course, and the location in which it was held (city, state).
- 4 Click the “Add files” button and select your upload document.

# SUBMITTING A CLASS ROSTER CONTINUED



**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
	In-house Safety Training	13	04/24/2018	04/24/2018	YANKTON, SD
	In-house Safety Training	13	05/01/2018	05/01/2018	YANKTON, SD
	In-house Safety Training	13	05/08/2018	05/08/2018	YANKTON, SD
	In-house Safety Training	13	05/22/2018	05/22/2018	YANKTON, SD
	In-house Safety Training	13	05/29/2018	05/29/2018	YANKTON, SD
	In-house Safety Training	13	06/19/2018	06/19/2018	YANKTON, SD
	In-house Safety Training	13	07/05/2018	07/05/2018	YANKTON, SD
	In-house Safety Training	13	07/26/2018	07/26/2018	YANKTON, SD
	In-house Safety Training	13	09/04/2018	09/04/2018	YANKTON, SD
	In-house Safety Training	13	09/18/2018	09/18/2018	YANKTON, SD

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# SUBMITTING A CLASS ROSTER CONTINUED

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)

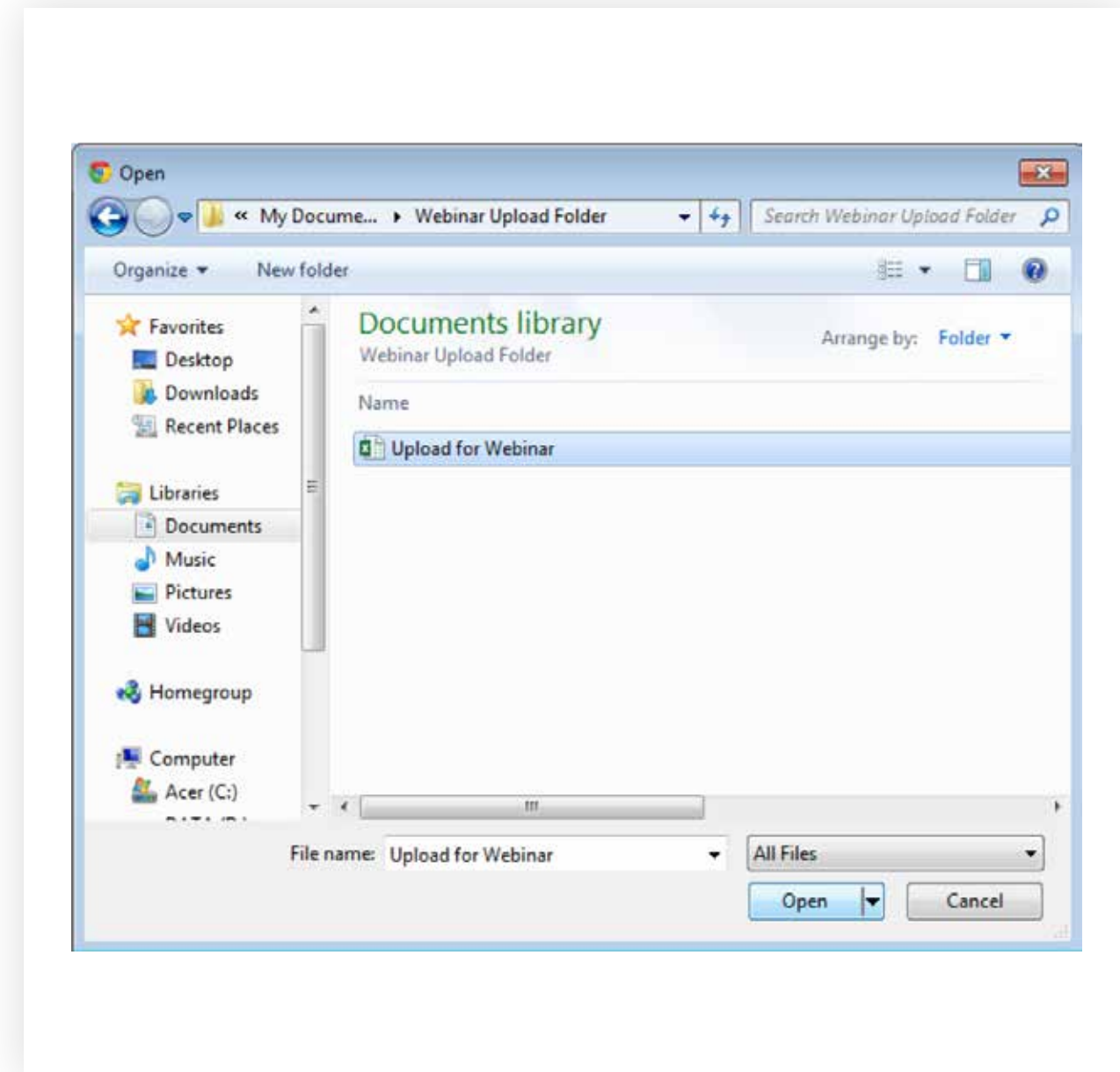
Start Date  
12/04/2014

End Date  
12/05/2014

Location  
Arlington, VA

Upload Import File

Upload for Webinar.xlsx   9.58 KB



# SUBMITTING A CLASS ROSTER CONTINUED



- You will be able to verify that the information you entered on the template matches what is recorded in NATE's database.
- Slight differences in first names are allowed, e.g. Bill instead of William.
- The system will alert you if any NATE IDs are incorrect. If you have made a mistake, update your template and upload it again.

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 ✓

# ADDING INSTRUCTORS

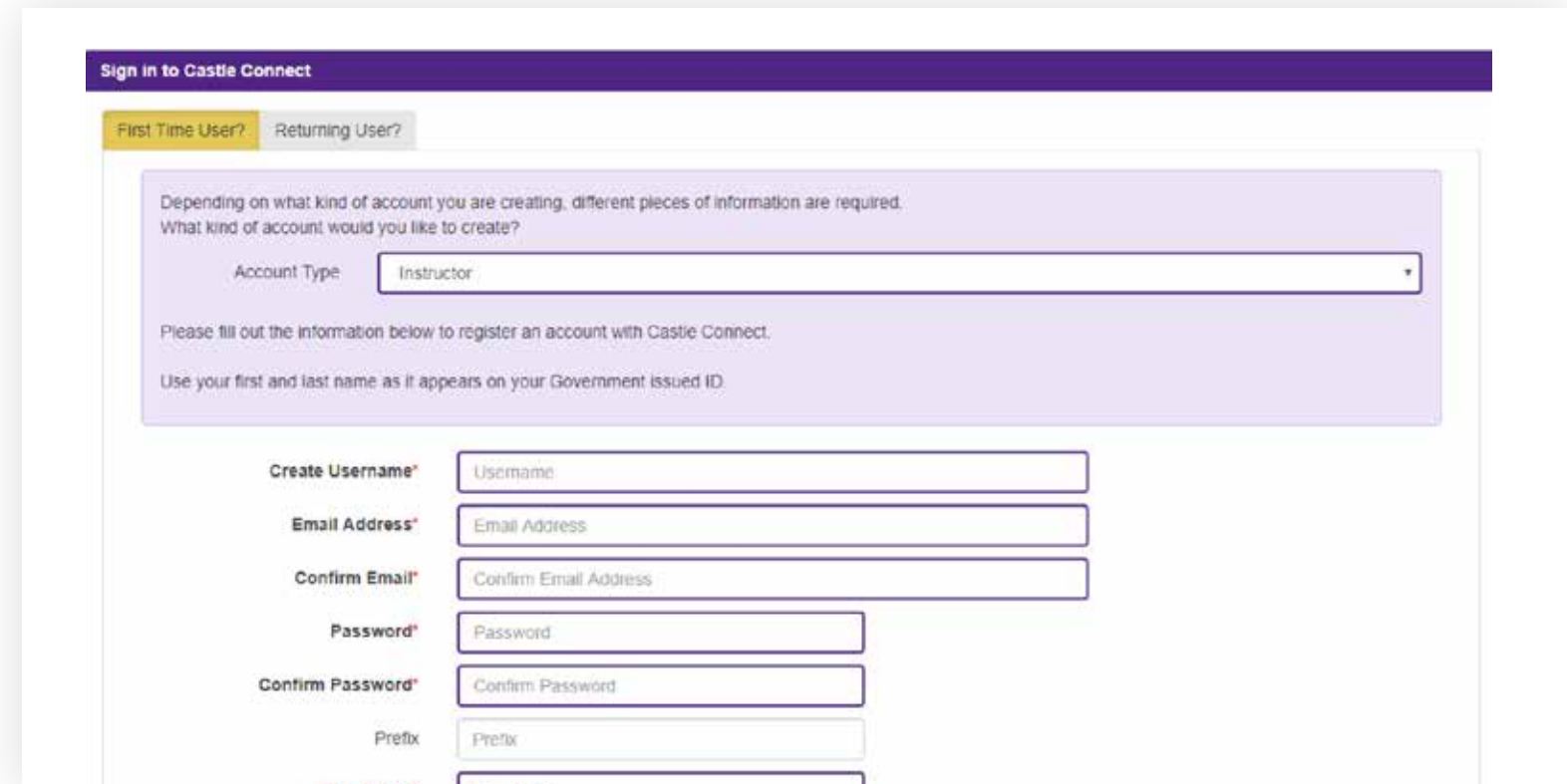
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- You can add additional instructors to your RTP through myNATE
- Instructors are individuals connected to the RTP, who can submit class rosters, but cannot register new courses.
- Only the administrator can register new courses.



# ADDING INSTRUCTORS CONTINUED

- If a person does not have a myNATE login from a different role with NATE, they need to go to [www.myNATE.org](http://www.myNATE.org), and click on the First Time User? tab.
- They can select “Instructor” as their activation type and create a myNATE account.
- Once created, they can provide their username to an RTP admin, who can then add them to the organization.



Sign in to Castle Connect

First Time User? Returning User?

Depending on what kind of account you are creating, different pieces of information are required.  
What kind of account would you like to create?

Account Type: Instructor

Please fill out the information below to register an account with Castle Connect.  
Use your first and last name as it appears on your Government issued ID.

Create Username\* Username

Email Address\* Email Address

Confirm Email\* Confirm Email Address

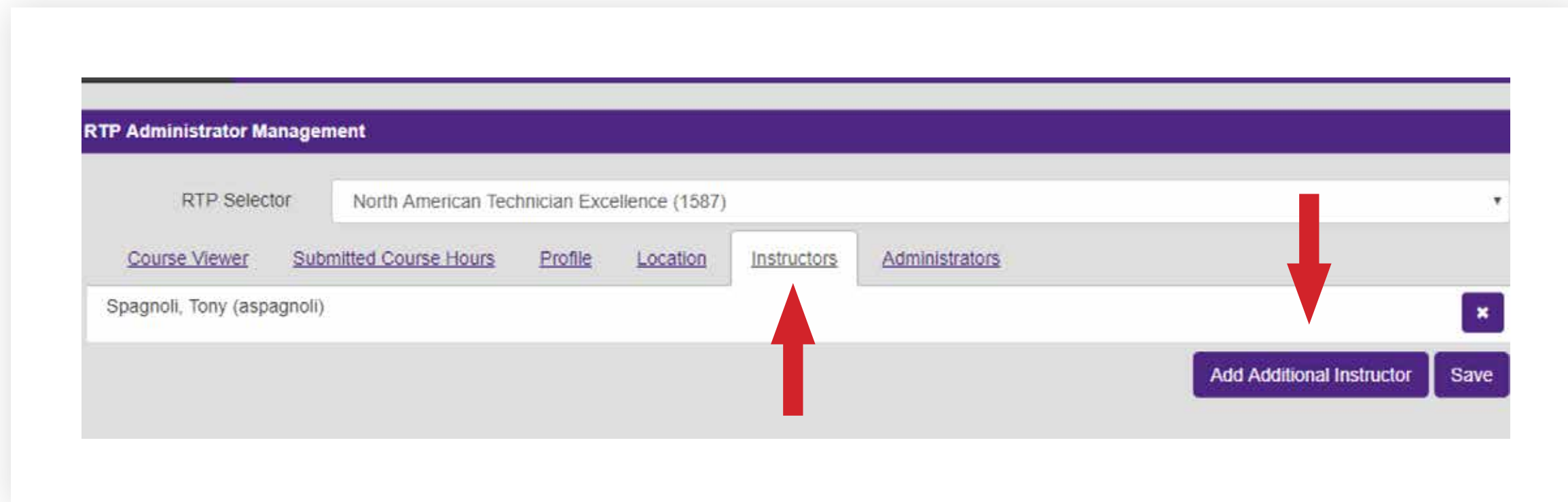
Password\* Password

Confirm Password\* Confirm Password

Prefix Prefix

# ADDING INSTRUCTORS CONTINUED

- To add an instructor to your RTP, go to the “Instructors” tab in your RTP Administrator Management window.
- This tab will include all instructors associated with your RTP.
- Click the “Add Additional Instructor” button, and then search by the instructor’s name or username.
- Click “Select” to the left of the search window to add the instructor to your organization.



# ADDING INSTRUCTORS CONTINUED



**RTP Administrator Management**

RTP Selector: North American Technician Excellence (1587)

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

Adanna Le Genre ✕ [Go!](#)

Limit Search to:  Username  First Name  Last Name  All Fields

	Username	First Name	Last Name
<a href="#">Select</a>	Alegendre	Adanna	Le Genre

Total Items: 1 (Showing: 1) Page Size: 10 ⏪ ⏩ 1 ⏪ ⏩

[Cancel](#)



# ADDING INSTRUCTORS CONTINUED



- Instructors have a similar, but limited view compared to the RTP admin.
- They will have a “Training” tab. When they click on that tab, it will bring them to the “Roster Upload” (Instructor) window, which is the same as the “Submitted Course Hours” tab of their RTP.
- They then follow the same procedure for submitting class rosters outlined above.



# INSTRUCTOR VIEW



**Roster Upload (Instructor)**

RTP Selector: North American Technician Excellence (1587)

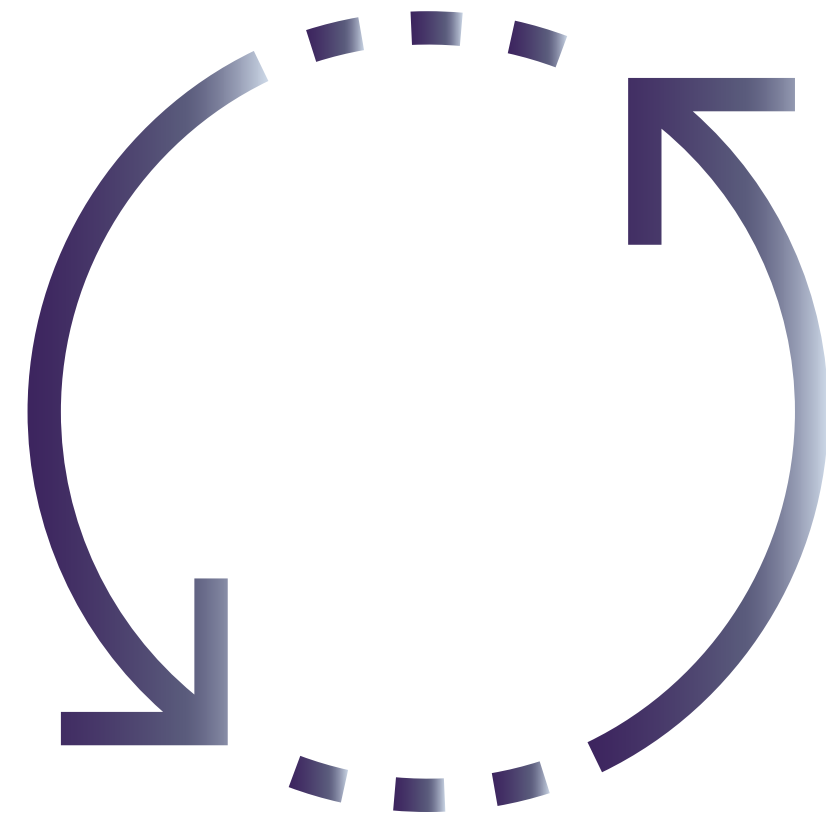
[Download Empty Roster Template for Uploads](#) **Upload Roster**

Reference C	Course Title	Participants	Start Date	End Date	Location
	In-house Safety Training	13	04/24/2018	04/24/2018	YANKTON, SD
	In-house Safety Training	13	05/01/2018	05/01/2018	YANKTON, SD
	In-house Safety Training	13	05/08/2018	05/08/2018	YANKTON, SD
	In-house Safety Training	13	05/22/2018	05/22/2018	YANKTON, SD
	In-house Safety Training	13	05/29/2018	05/29/2018	YANKTON, SD
	In-house Safety Training	13	06/19/2018	06/19/2018	YANKTON, SD
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	In-house Safety Training	13	09/18/2018	09/18/2018	YANKTON, SD

Total Items: 10437 Page Size: 10 « ◀ 5 ▶ »

# RENEWING A COURSE

- A “Renew” button will appear under the “Actions” column on the course viewer 6 months before a course expires.
- To renew a course, simply click on this button.
- You will then see training editor, and be able to your course information.
- Follow the same procedure as submitting a new course to renew the course.



# RENEWING A COURSE CONTINUED



**RTP Administrator Management**

RTP Selector: North American Technician Excellence (1587)

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

[Add Training](#)

1587-0060 [×](#) [Search](#)

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
1587-0060	Sample Course	Sample description	Expired	11/18/2016	<a href="#">Q</a> <a href="#">↻</a>



# RENEWING A COURSE CONTINUED



Training Editor ✕

**Course Reference Code**  
1587-0060

**Title**  
Sample Course

**Description**  
Sample description

**Current Approval Status:** Pending (Renewal)

Unassociated Specialties	Associated Specialties & Units
Air Distribution Installation	Air Conditioning Installation 1
Air Distribution Service	Air Conditioning Service 1
Commercial Refrigeration Installation	Air to Air Heat Pump Installation 1
Commercial Refrigeration Service	Air to Air Heat Pump Service 1
Gas Heating (Air) Installation	Efficiency Analyst Senior 1
Gas Heating (Air) Service	
Ground Source Heat Pump Installation	
HVAC Performance Verifier	
Hydronics Gas Installation	

Cancel Continue

# RENEWING A COURSE CONTINUED



### 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 Renewal for North American Technician Excellence (1587) - Course: Sample Course	1	\$110	\$110
Total:			\$110

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](#) [credit card](#)



## NEED HELP?

Please contact the NATE customer service line at 877-420-6283 or [askNATE@natex.org](mailto:askNATE@natex.org).

