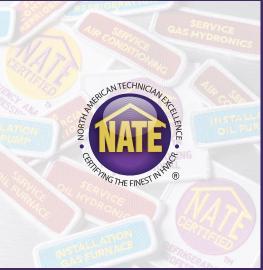Preparing for the NATE Exam

Proctor Script

NORTH AMERICAN
TECHNICIAN EXCELLENCE

This script should be completely read for all of NATE's Paper Exams. Reading this script gives all candidates an equal testing experience.

INSTRUCTIONS FOR READING THE EXAM

Testing organizations, proctors, and test candidates should refer to the Knowledge Areas of Technician Expertise (KATEs) to understand the scope of each certification. The KATEs are available on www.natex.org. NATE certification is awarded in the following three categories:

1. Please read the script before administering the exams to be comfortable with the script and so you can contact NATE if you have any questions.

2. Key for the script:

    a. Anything in normal type should be read aloud.

    b. [Items in brackets should be substituted with your own information]

    c. (Items in parenthesis are conditional. Only read these lines aloud if it is applicable to your situation)

    d. Items in bold are important and their importance should be stressed while reading the script

    e. Items in italics are directions for your actions and should not be read aloud.

SCRIPT

Hello and welcome, (you may know my name, but I am going to repeat it here for the exam record). My name is [your name], and I am an approved proctor for NATE testing. (In our previous meetings I represented [your organization] in a different capacity). Today I represent [your testing organization] and I will be proctoring this test session.

As the test session proctor, it is my responsibility to administer this exam in a manner that will allow each of you to perform to the very best of your ability. These administration procedures may seem lengthy and formal, but I use the same standards that every other Testing Organization and proctor uses. These standards ensure all candidates receive the same testing experience. *(If you have additional proctors assisting, please introduce them).* **(Joining me today are [assistant proctor names].)**

Our test session will begin in a few moments. First, I will need to complete some test security checks and go over some basic information about NATE credentials.

First, I will need all of you to store your personal items at [your assigned personal storage area away from the testing area]. This includes all personal electronic devices such as cell phones, smart phones, Black Berries, Nextels, iPads, PDAs, etc. Once the test session starts you will not be allowed access to your personal items.

Allow any candidates that still have electronic or other non-approved personal items time to store their items in your designated area. Do not continue until all candidates have returned.

Now I will need to check your personal identification. NATE requires that you show me a government issued photo ID such as a driver's license, student identification, or passport. If you do not have a photo ID with you, I am sorry, but you cannot sit for the exam. I will need you to leave the exam location.

Check each candidate's photo ID. Even if you know a candidate personally, they still need to show you their photo ID. If any candidate does not have a photo ID have them leave the testing area.

I will also now pass out the return envelope that will be used to ship all your testing materials back to NATE. *The return envelops are part of the materials you received in your exam package for this testing session. Please make sure each candidate has one per exam taken.*

I will now hand out the test packets. Do not open your test packet until I give that instruction.

Hand out the test packets at this time. If at any time someone opens their packet before you instruct them to, please take it and hold onto it until the appropriate time. If a candidate is taking more than one exam in this session, only give them the packet for the exam they want to take first.

The NATE exams being administered today are:

Read off the list of exams you are giving in this session. Candidates should have already indicated what exams they want to take during your registration process. The exams NATE offers are:

- *Core*
- *Air Conditioning (Service or Installation)*
- *Air Distribution (Service or Installation)*
- *Air to Air Heat Pump (Service or Installation)*
- *Gas Heating Air (Service or Installation)*
- *Oil Heating Air (Service)*
- *Gas Hydronics (Service)*
- *Oil Hydronics (Service)*
- *Light Commercial Refrigeration (Service)*
- *Commercial Refrigeration (Service)*

- *Ground Source Heat Pump Installer*
- *HVAC Performance Verifier*
- *Senior Level Efficiency Analyst*
- *Heating and Cooling Support Technician Certificate Exam*
- *Low GWP Refrigerant*
- *Certified HVAC Professional – HVAC Fundamentals*
- *Certified HVAC Professional – Electrical and • Controls*
- *Certified HVAC Professional – Comfort and Airflow*
- *Certified HVAC Professional – Installation*
- *Certified HVAC Professional – Service*

Please note: **When passing a service specialty, you are also awarded its installation counterpart. However, the granting of the additional specialty certification does not include the chevron (smaller patch) in the certification packet. The extra chevrons can be purchased on the NATE online store.**

Please note: **When passing the Air to Air Heat Pump Specialty, the Air Conditioning specialty is automatically awarded. However, the granting of the additional specialty certification does not include an extra chevron in the certification packet. The extra chevrons can be purchased on the NATE online store.**

Please note (if anyone in your session is taking the exam): **The Heating and Cooling Support Technician is a certificate exam. Passing this exam awards a certificate, not a NATE certification.**

I will now go over some basic information about earning the NATE certification.

Please read the below information about certification requirements. You can skip any information about Ground Source Heat Pump Installer and Senior Level Efficiency Analyst if you are not proctoring either one of those exams.

To achieve certification for most Installation or Service specialties, you must pass the Core exam as well as the specialty exam. (The Ground Source Heat Pump and HVAC Performance Verifier certifications do not require passing a Core exam.) (The Senior Level Efficiency Analyst exam requires you to already hold two NATE Service Specialties, one in a cooling and one in heating). If you pass a specialty exam without passing the Core exam, the specialty test credit will be valid for 2 years. If you pass the Core exam without passing a specialty exam, the Core test credit is also valid for 2 years. A complete certification is valid for 2 years (3 years for Ground Source Heat Pump and HVAC Performance Verifier). (The Heating and Cooling Support Technician is a certificate exam, not a NATE certification. The certificate does not expire.)

The Core exam contains 50 questions. The installation or service specialty exams contain 100 questions. (The Senior Level Efficiency Analyst, Ground Source Heat Pump, and HVAC Performance Verifier exams contain 100 questions.) All NATE exams are timed. You will have 1.5 hours to complete the Core exam. You will have 2 ½ hours to complete any specialty exam. (You have 2 ½ hours to complete the HVAC Performance Verifier Exam). (You have 2 ½ hours to complete the Ground Source Heat Pump Installer exam). (You have 4 hours to complete the Senior Level Efficiency Analyst exam). You will have 2.5 hours to complete the Low GWP Refrigerant exam. You will have 1 hour to complete the Certified HVAC Professional exams.

EXAM SECURITY INFORMATION

NATE takes the security of its exams very seriously. Here are the guidelines to follow during the exam today:

- **No talking during the session**
- **You may not get up and walk around freely during the session**
- **You may leave one at a time to use the lavatory facilities. Please raise your hand and a wait my instruction.**
- **Do not disturb the other candidates during the testing session.**
- **Communication with another candidate for any reason, copying, or sharing answers is considered cheating. Removing any exam materials from the examination room including test booklet, answer card, comment sheet, original sealed packet, return envelope, or any scrap paper or discussing the exam questions with others is also considered cheating. If any form of cheating occurs, I will collect all of your exam materials and notify NATE. Your exam will not be scored.**
- **Any violation of NATE testing security procedures may result in invalidation of the test results for everyone.**
- **If NATE determines that an individual engaged in any improper conduct or cheating while taking the exam, NATE will revoke that individual's certification and test results.**

Once testing begins I cannot answer questions on any subject other than testing procedures. If you have any questions about the information we have already covered about test specifics and certification requirements please ask them now. The only items allowed on your table for the

NATE exams are your test packet, pencils, and a non-programmable calculator. The reverse side of the Test Survey can be used as scratch paper.

Answer any questions about NATE test specifics or certification requirements. Make sure candidates have moved any other items to the approved storage area. If questions are asked about the certification that you cannot answer, please inform the candidate to contact the NATE Customer Service line at 877-420-6283.

At this time you may open your test packets. However, do not open your test question booklets. Please save the exam packaging. It will be returned with your completed exam to the testing service. Nothing in your packet should be considered trash. Everything will be returned at the end of testing session. Upon completion of your exam, raise your hand and wait for me to check your open testing packet for a completion review. Do not seal the return envelope until I have reviewed that everything was filled out correctly. Once I have checked it for completion you will seal and sign your return envelope. (You can then request your second exam packet if you are taking more than one exam). Does everyone have the correct booklet?

Make sure that all candidates have the correct test booklet. Candidates should have previously indicated to you what exams they wanted to take. If the test booklet does not match the exam type ordered, please contact NATE at 877-420-6283.

Your packet should contain the following:

- **Test Booklet for the requested exam**
- **An answer card***
- **A test survey***
- **NATE Code of Conduct***
- **Formula Sheet***
- **Temperature and Pressure Chart***
- **Demographic Card**

*Located at the back of the test booklet

Comments made on the test survey will be reviewed by NATE. The NATE Technical Committee uses your responses to enhance the exams. You can choose to make comments on the test survey during your exam or wait until you are finished with the exam. You are not required to leave comments, but NATE does encourage it.

At this time, please open the back of your test booklet. Please rip out along the perforated edges your Code of Conduct, Answer Card, Formula Sheet, Temperature and Pressure Chart, and Test Survey. Please do not open the front part of the booklet.

First, please review the NATE Code of Conduct. Once you have read the Code of Conduct, please sign the bottom of the page. If you do not sign the NATE Code of Conduct, you will not be able to sit for this exam. Please sign the Code of Conduct even if you have done it at a prior exam.

Please check each Code of Conduct form to ensure it has been signed.

If any candidate refuses to sign the Code of Conduct, then please quietly ask them to leave and gather up their exam materials. Please indicate this on the test session audit form when you are preparing the return package as to why an exam was open but not taken. NATE will not charge you for this exam.

Please move the Code of Conduct, Formula Sheet, TP Chart, Answer Card, and Test Survey off to the side, we will now complete the Demographic form.

DEMOGRAPHIC FORM INSTRUCTIONS

Please enter the information according to my instructions. Please do not skip ahead. Please advise everyone to write clearly so the NATE team can enter in the information provided accurately.

1-3. Name
Please clearly write your first name, middle initial, and last name in sections 1 through 3. This is the name that will appear on your myNATE record. Be sure your name is entered as you provided it on any previous NATE exam(s) you may have taken. Please make sure you use the exact same name as on your previous testing. NATE staff compares names and will create an additional record if the information is different. An example is:

First Exam: William
Second Exam: Willie Third Exam: Bill
Fourth Exam: Billy
Fifth Exam: Will

This is a real example of one candidate that ended up with 5 separate records in the NATE system. If you receive your results and believe a separate record was created, please contact NATE at 877-420-6283 and the NATE staff can merge your records together. However, this will slow down the receipt of your certificate and certification packet.

4-8. Mailing Address
Please clearly write your street address in sections 4 through 8. Be sure to include an apartment or unit number if necessary. NATE will send your certification packet with your patches to this address.

9. Primary Phone Number
Please provide your phone number. NATE uses this number to contact you later with reminders about upcoming expiration dates. If you provide a mobile number, you can receive text message reminders from NATE about your recertification.

10. Email Address
Please clearly write your email address in this section. This is where NATE will send the link to your certificate, which you will be able to print or share electronically. This email address is also necessary to receive your information for creating a myNATE login. NATE also uses this email address to keep in touch with you after the exam session. This includes sending important notifications such as your renewal notices.

11-17. Employer Information
Please clearly write the name of your employer, address, and contact information for your employer in sections 10-17. If the email you used above is the same as the email you use for work, you do not need to write it again.

18. NATE Information
Please indicate whether or not you have taken a NATE exam before by checking off either the Yes box if you have, or the No box if you have not. If you have taken a NATE exam before, please provide your NATE ID number in the space provided. If you do not know your NATE ID number, but are sure you have taken a NATE exam before, please check off the yes box, but leave the NATE ID blank. This will alert the NATE staff to attempt to locate your existing record while processing this session.

19. Exam Information
Please list the exam code and serial number for the exam you are taking. This information is located on the front page of your exam booklet. The exam code is the 4 letter code in the lower right hand corner on the front page of your booklet. For example, the Air Conditioning Service exam code is ACSV. The serial number is the 8 digit number under the middle bar code on the front of your booklet.

Optional Questions
The last section of the demographic form are optional questions. Any response to these optional questions will not affect your exam results in any way. Any specific information you provide is not shared with anyone; it is used by NATE for internal research purposes. Please make a check mark in the box to the left of your answer choice.

Please walk the room to check to ensure that candidates have completed their demographic forms. Providing accurate and legible information is critical to NATE being able to score their exams in a timely manner and ensuring that no duplicate records are created for candidates.

Now that everyone has completed their demographic form please set it aside. You do not need to complete a new demographic form for each exam that you take. You will need to enter the exam code and serial number for each exam you take in section 19.

After you have completed your final exam for this session, please seal the demographic form with your other exam materials in your last return envelope. If you are taking more than one exam, please be careful not to accidentally seal your demographic form in with your first exam.

If a candidate does seal their demographic form with their first exam while they are taking multiple exams, please note which other exams they took in the comments section of the test session audit form.

We will now go over the instructions on how to complete your answer card. It is important that you mark all of your answers on the answer card, and not in the exam booklet. The machines used to score your exam cannot scan the booklets. Failure to mark your answers on the answer card can result in long delays in scoring.

ANSWER CARD INSTRUCTIONS

Please enter the information according to my instructions. Please do not skip ahead. Place one letter or number in each of the boxes and fill in the corresponding circle below.

1. Last Name
If you have tested with NATE before, please use the exact last name you used previously to prevent record duplication. The name on your answer card should match the name you provided on your demographic form.

2. First Name
If you have tested with NATE before, please use the exact first name you used previously to prevent record duplication. The name on your answer card should match the name you provided on your demographic form.

3. Middle Initial
Again, it is important to provide the same middle initial you used previously.

4. NATE ID
If you have taken a NATE exam before, please enter your 7 digit NATE ID number in this space. If you have not, please leave it blank. A NATE ID number will be assigned to you when these exams have been processed by NATE.

5. Booklet Serial Number
Please enter the 8 digit serial number in this space. The 8 digit booklet serial number is located under the barcode in the center of the front cover of your exam booklet.

Please flip your answer card over. This is the space where you will mark the answers to the questions in the test booklet.

- **Do not mark the test booklet. Any answers marked in the test booklet will not be counted.**
- **Only answers marked on the answer card will be counted.**
- **Please note that you must fill in the box completely for it to be read by the scanner; do not use check marks.**
- **There is an example at the top of the answer card where it shows the correct way to mark an answer.**

You will have [time limit] to complete your exam. *Time limits are listed below.*

The Core exam has a time limit of 1.5 hours. Specialty exams, the Ground Source Heat Pump Installer, Heating and Cooling Support Technician, and the HVAC Performance Verifier, Low GWP Refrigerant exam have a time limit of 2 ½ hours. The Senior Level Efficiency Analyst has a time limit of 4 hours. The Certified HVAC Professional exams (each one of them) has a time limit of 1 hour.

If technicians are taking different exam types at the same time, please note which candidates will have shorter or longer time limit than the others. Please call out a time warning during the last half hour of the exam.

If you complete your exam before the time limit, please raise your hand. I will come over and ensure that all materials have been completed. If all the testing materials are complete, I will watch as you place all your testing materials in, seal, and sign the return envelope.

If you are taking a second exam, I will distribute the packet to you at that time. You will follow this same procedure and remove the Code of Conduct, answer card, formula sheet, TP chart, and test survey from the back of the booklet. Proceed to fill out your second answer card and update your demographic form with the exam code and serial number located on the front of your second test booklet. Please raise your hand when you have finished preparing the second answer card and updating your demographic form. I will then note the start time of your second exam and you can begin.

Remember, any exam opened in this session has to be sealed by the end of that exam's time limit, even if you have not finished it. Once the time limit has been reached, I will ask you to set down your pencil and flip over your answer card and wait for me (or [assistant proctor]) to come by. I will then check your materials for completion. After this check, I will observe you place all of your exam materials in, seal, and sign the return envelope.
Please remember to seal your demographic form in the envelope of the last exam you are taking in this session.

If you are allowing candidates to leave the session as they complete their exams, please read the "End of Session" information at this point.

Are there any questions? Please remember I will only be able to answer questions about testing procedures; I will not be able answer any questions or provide clarifications about the exam items.

Answer any questions.

If there are no more questions, let's begin. Please open the front of your test booklets and begin. Good luck to each of you.

At the end of an exam's time limit or when a candidate raises his/her hand to indicate that they are finished, check their materials for completion. You will need to ensure that their answer card has been filled out and signed, and that they have completed all questions (the NATE Core exam has 50 questions, all other NATE exams have 100, the Certified HVAC Professional exams have 30 questions) if they still have time remaining. After you have determined that all the materials have been completed, observe them putting the materials in the return envelope, sealing it, and signing it.

END OF SESSION

After all exams have been completed or all time limits have been reached, you can read the following informing candidates of how to reach their test results. If you are allowing candidates to leave the testing area as soon as they have completed their exam, please read this information before beginning the exams.

NATE will grade and post your results online within 2 weeks after receiving the exam packets. After accounting for the shipping time of the exams to NATE, it can take up to 3 weeks for them to be available (West Coast shipping time). Shortly after they have been posted online, you will receive a link to your "BadgeCert" Certification Badge at the email address you provided on your demographic form. The Certification Badge can linked on your website, email signature, LinkedIn profile, and more. You can also click on any certification badge to print or save a copy of your certificate at any time. You will receive your certification packets and results directly from NATE.

After NATE has received the exam package and created the test session, you will receive an email acknowledging you were this session and that your results will be available soon. This email will also include directions on how to create your myNATE login. If you have any trouble logging on to the myNATE site, please contact NATE customer service at 877-420-6283.

THIRD PARTY RELEASE

Once you have created your myNATE login, you can share your results with me as your proctor and your employer by accessing your myNATE profile. After you have selected the profile button next to the left of your name on the myNATE page, scroll down to the bottom of the profile page to the "Attestation" box. Click the icon next to the "Share Results Attestation" and then click the "I attest" button. I will then be able to view your results when they become available and your employer can contact (me or) NATE directly to request your results.