energy **API**

AMERICAN PETROLEUM INSTITUTE

Global Industry Services
Certification Programs

My Guide to myCerts®

User Guide for Applicants

July 2014

My Guide to myCerts®

INTRODUCTION

Welcome to myCerts! This User Guide contains essential information to help the new user make full use of the API myCerts system.

API has redesigned myCerts in order to give all users more control over the management of their existing certification(s), submitting application(s), accessing online legal agreements, generating and printing invoices, overall account maintenance, and responding to audit findings. In addition, more information regarding the status of your organization's license(s)/registration(s) will be available via the API Composite List.

IMPORTANT NOTE TO RETURNING USERS

Even if you used the myCerts system prior to July 2014, you will need to register your email address in the redesigned system. API has ensured that all facilities associated with your existing email address will carry over to your User Account after you complete the registration process.

In addition, you will have the option to add other contacts to your User Account who need access to your organization's facility information in myCerts. All contacts will have access to the same Facility List and the ability to perform/request maintenance to the facilities associated with your account.

CONTACT LIST

API Helpdesk
Send an email to myCertsSupport@api.org or call 1-866-921-5148.

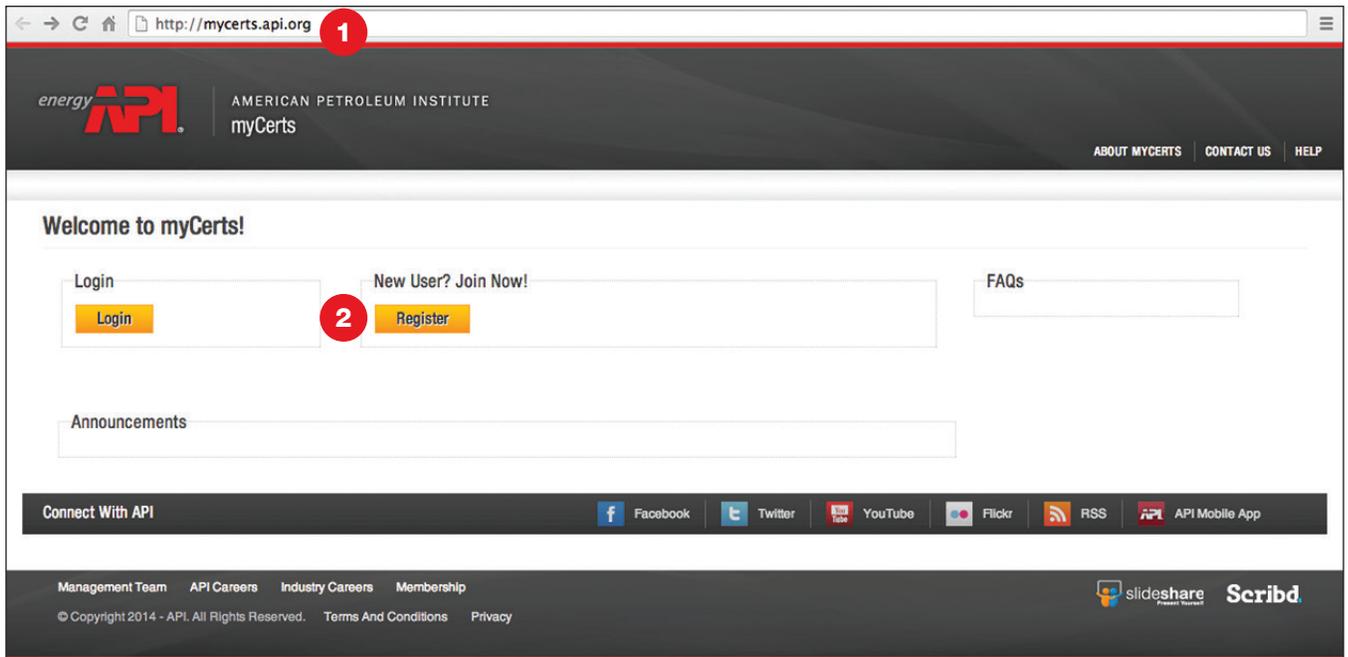### Global Sales
Send an email to sales@api.org.

General Inquiries
Send an email to certification@api.org.

Table of Contents

(A) Register As a New User

1 Open your web browser and access myCerts by typing **http://myCerts.api.org** into the browser's address bar. The above myCerts Welcome/Login page will appear.

All existing users will need to register and login to the redesigned system.

2 Click "Register" to begin the user registration process.

A valid email address is required to register on the myCerts site.

(A) Register As a New User

3 Complete the registration form by typing in your information and creating a password. Fields marked with an asterisk (*) are required.

Your email address will be used to login to myCerts in the future.

Passwords require eight (8) characters and at least one (1) numeric and one (1) special character.

When entering your work address, if your country is not listed as a choice, please contact sales@api.org.

4 Once you are satisfied that all required information has been entered, review the terms and conditions of the User Agreement. Click the check-box provided to acknowledge your agreement with the terms and conditions.

5 Click "Save" to proceed with the registration process.

If needed, you may also "Cancel" the registration. The information previously entered will not be saved and you will have to restart the registration process.

(A) Register As a New User

6. If you clicked "Save," the above screen will appear. **DO NOT** enter your email address in the space provided. **DO NOT** click "Resend Verification Email."

7. Go to your email inbox for the email address that you used to register. You will receive an email message from myCerts that contains a link to complete the myCerts registration process.

7.

To confirm your login, please verify your email address.

Thank you,
API myCerts

A Register As a New User
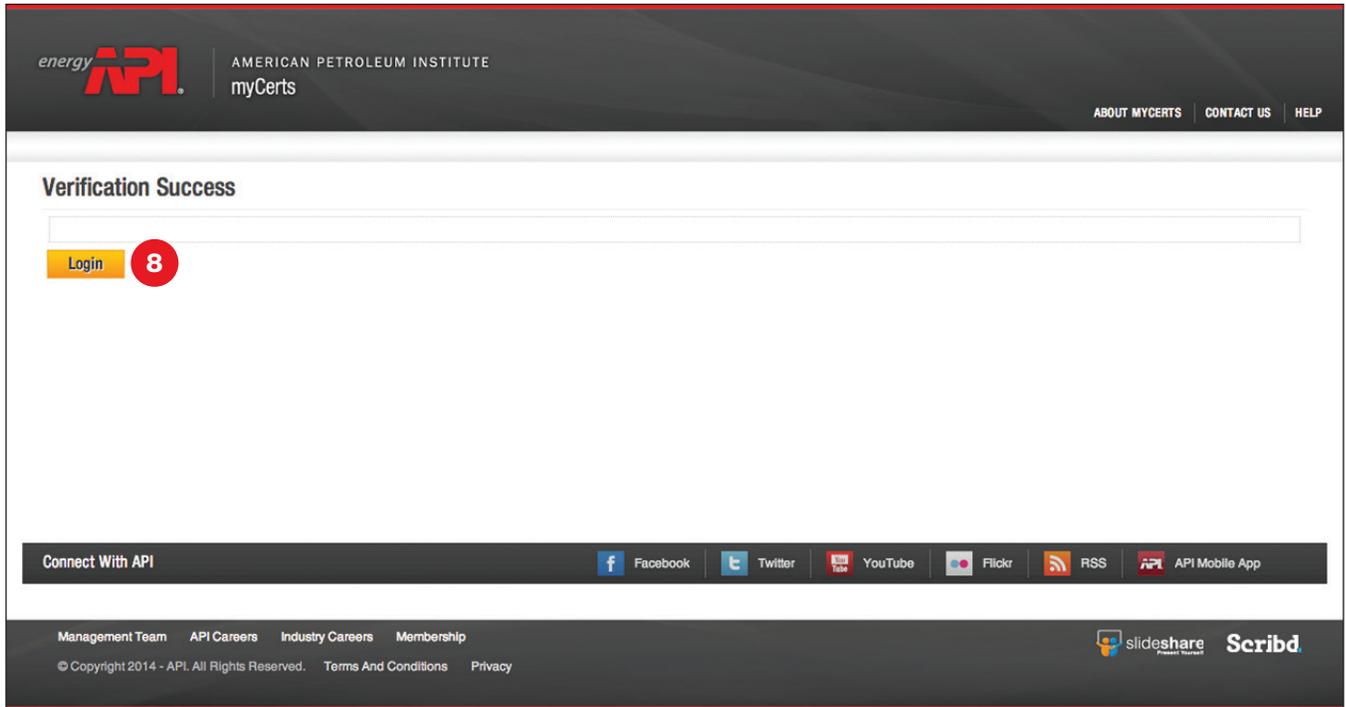
8 Once you click on the link in your email, the initial registration process is complete. You will see the above screen indicating that your email address has been verified. You can proceed by clicking "Login" to enter myCerts.

B Login to myCerts

1 From the login screen, you can enter myCerts and submit an application or request. Enter your email address and password, then click "Login." The following screen will appear.

B Login to myCerts

Choose the desired option to proceed:

2 If you click "Contact API Helpdesk," you will be able to send an email addressed to myCertsSupport@api.org.

3 If you click "Search the API Composite List," you will be rerouted to the API Composite List in real-time, where you will find up-to-the-minute information for all API licensed/registered organizations. This is for information only.

You may search the API Composite List at any time by accessing **http://CompositeList.api.org**

4 If you click "Create New Facility Account," you will be able to add a new facility location. Please see Section C – Create a New Facility Account for next steps.

You only need to create a new Facility Account if you are adding a new facility location and want to submit an application for licensing/registration for that facility.

C Create a New Facility Account

Please refer to the following page for instructions corresponding to the above screen.

C Create a New Facility Account

1 Enter the information for the Facility Account you are adding. All fields marked with an asterisk (*) are required. You will not be able to proceed until these fields are filled. The Company Legal Name is the name that will appear on your certificate(s).

2 The Facility Name is not required; however, if your organizations have multiple facility locations, you may want to assign a Facility Name in order to differentiate between sites.

3 Enter the facility Telephone Number where contacts at this facility location can be reached.

Sales Phone and identifying the company website are not required fields.

4 The Location Address will identify the physical location of the facility (property/building) where the actual work is performed.

This address will appear on your certificates and on the API Composite List.

5 The Mailing Address is the location where you want API to send all correspondence related to this facility (invoices, certificates, letters, etc.). If the Mailing Address is the same as the facility location you are adding, select the "Same as above" check-box and the facility address information will automatically populate.

6 Enter the mailing address information, if different from the facility address.

7 Enter the Contact Name for this location – it is required, even if you are the contact.

8 Once you are satisfied that the correct information has been entered, click "Save." If you do not want to Save the information entered, click "Cancel." If you click "Cancel," you will be routed back to the login screen to restart the process or log out. The information entered will not be saved.

API has a built-in tool to verify all facility and mailing address information. The address verification will occur after you click "Save" at the bottom of the screen.

There are four possible messages related to address information entered into myCerts: "Success," "Confirm Facility Address," "Unverifiable Location Address," or "Duplicate Location Address."

You will only need to contact API at myCertsSupport@api.org if your selection returns an error message other than those listed above.

C Create a New Facility Account
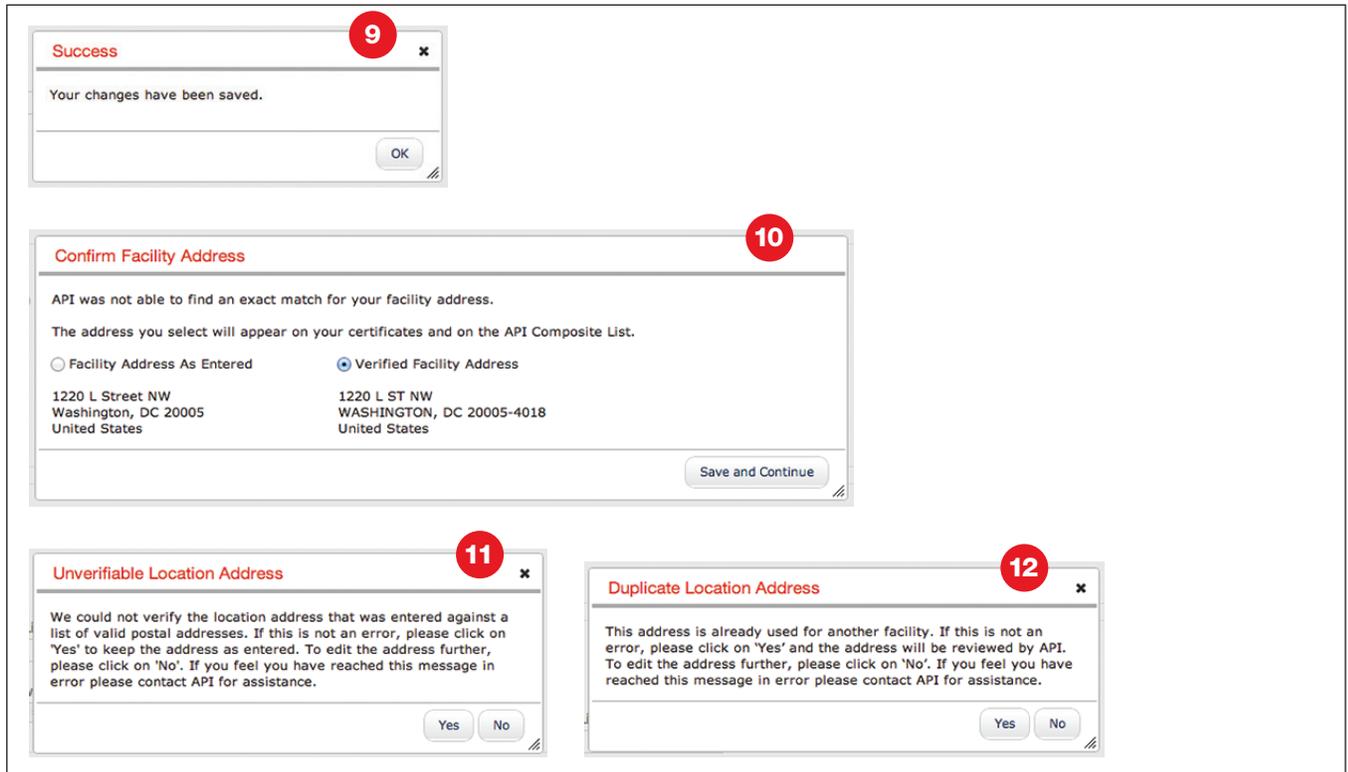
9 If the address you entered is verifiable, you will receive a "Success" notification, indicating you have successfully created a new Facility Account. Click "OK" and skip ahead to step 13 of this section.

10 If you receive the "Confirm Facility Address" notification, select the appropriate box to proceed, then click "Save and Continue." You will receive a "Success" notification (see number 9 above), indicating you have successfully created a new Facility Account. Click "OK" and skip ahead to step 13 of this section.

11 If you receive the "Unverifiable Location Address" notification, you can choose whether to proceed or go back and make changes. If you click "Yes," you may proceed. API will contact you for further information. If you click "No," you may go back and edit the location address before proceeding. If the edited address is verifiable, you will receive a "Success" notification (see number 9 above), indicating you have successfully created a new Facility Account. Click "OK" and skip ahead to step 13 of this section.

12 If you receive the "Duplicate Location Address" notification, you need to choose whether to proceed or go back and make changes. If you click "Yes," API will contact you with further instructions. If you click "No," you may go back and edit the location address before proceeding. If the edited address is verifiable, you will receive a "Success" notification (see number 9 above), indicating you have successfully created a new Facility Account. Click "OK."

C Create a New Facility Account

13 A Facility ID has been assigned. Now you can review the Facility Account or create a new application.

14 To create a new application, click "Create New Application" and skip ahead to Section D – Create an Application. To review the account, click "Review Account." The screen below will appear.

15 If you have more than one facility location to add to your account, click "Create New Facility" and repeat steps 1 through 12 of this section for each additional facility.

16 Once you have entered the correct information for each facility, click "Facility List" at the right of the screen to review your Facility List in its entirety.

ⒸCreate a New Facility Account

17 From this screen, you can review all of your facility locations. Click on a Facility ID number to review the Facility Account and/or create a new application. Please see Section D – Create an Application for next steps.

D Create an Application
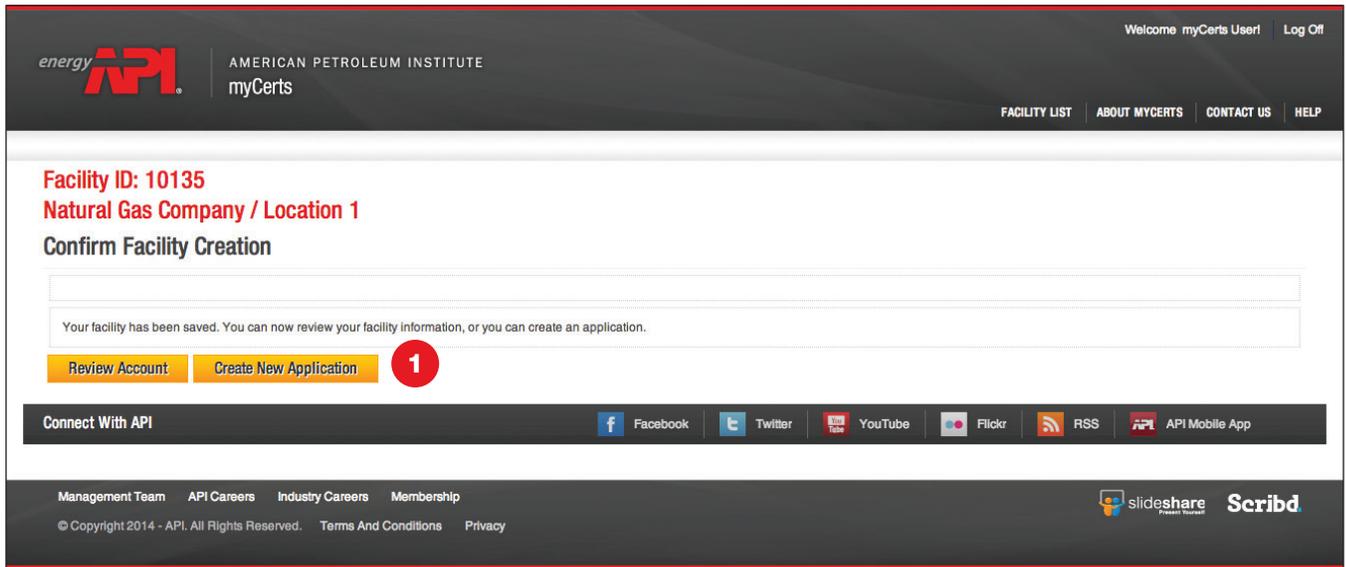
1 Once you click "Create New Application," you will be navigated to the "New Application Process Overview" page as shown below.
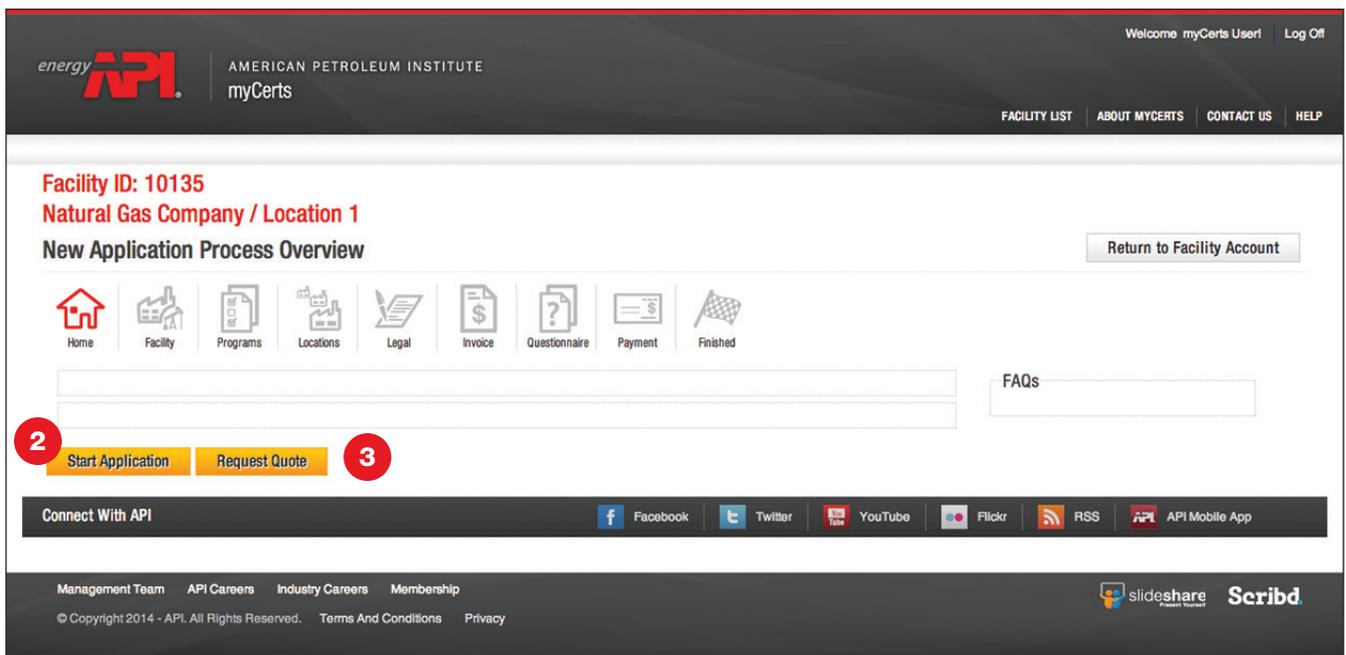
2 Click "Start Application" to begin.

3 If you would like a quote before applying, click "Request Quote." You will be routed to a webpage where you can submit this request.

D Create an Application

4 Confirm you are applying for the correct facility by clicking "Next." Skip ahead to Step 8.

If at any time you want to cancel your application, click "Cancel Application."

5 If you need to change the facility for which you are creating an application, click "Change Facility."

An Invoice stating the application fee will be generated during the application process.

D Create an Application

6 Select another facility by clicking on the circle next to the Facility ID number.

7 Click "Next."

8 Select the API Certification Program(s) for which you are applying. Then click "Next."

If you have questions about the types of certifications offered, send an email to sales@api.org.

Organizations can achieve registration to one, a combination of, or ALL of the management system standards. API Spec Q1® and ISO 9001™ or API Spec Q2™ and ISO 9001 can be achieved through one convenient annual audit and one annual fee for either set of registrations with API.

9. **Monogram Applicants:** you must select at least one specification/standard for which to apply. In the above example, API Spec 5CT has been selected. You can select multiple specifications/standards by clicking on the box next to each specification/standard.

10. **Registration Applicants:** you must enter a scope statement for each registration for which you are applying. The scope of registration **must be the same** for each management standard.

D Create an Application

11 Monogram Applicants: For each Specification/ Standard, you will need to add products and/or product details. Select all applicable products for which you are applying, and then click Next.

For more information, you can refer to the Licensing Information Forms posted on API's website at http://www.api.org/ certification-programs/api-monogram-program-and-apiqr/ licensing-information-forms.

D Create an Application

12 **Monogram Applicants:** Some products may require additional information related to group, grade, or product service level. Make your selections and click "Next."

13 You can add additional product details by clicking "Add." To delete product details, click the "X" in the red circle on the right of the screen.

14 When you are finished, click "Next."

D Create an Application

15 If your quality manual and conformity matrix contain a justified exclusion, please select that exclusion for each license and/or registration by clicking the appropriate check box. In the above example, Design and Development has been selected as an allowable exclusion for the Monogram license and for the ISO 9001:2008 registration. If your facility does not claim any exclusion, leave all check-boxes blank and click "Next."

D **Create an Application**

16 Please review the information entered carefully. If it is correct, click "Next" and skip ahead to Step 18 of this section. If any information is incorrect, click "Back" to edit your selections.

D Create an Application

17 If you continue to click "Back," you will be returned to the previous screens until you reach the New Application Process Overview. From this screen you have two options: "Continue New Application" or "Return to Facility Account."

D Create an Application

18 You will be given the option to add an Alternative Marking Agreement (AMA), if applicable. Refer to Section K of this guide for more information regarding this agreement. If the AMA is not applicable to the specification(s)/standard(s), you will be routed directly to the next step to review and sign the Legal Agreements.

The above screen may not appear based on the Monogram specification(s)/standard(s) for which you are applying for a license.

D Create an Application

Please refer to the following page for instructions corresponding to the above screen.

D Create an Application

19 You are required to accept terms and conditions of the API Monogram Program Licensing Agreement and/or the APIQR Registration Agreement by typing your full name in the box below your printed name. This is your electronic signature. If you are presented with multiple agreements, you must sign below each agreement.

20 If you are signing on behalf of another person, you must check the box and type that person's name, title, and email address in the space provided. Otherwise, if you have authority to sign for your company, leave the check-box blank.

21 Click "Accept" to proceed.

22 Once you electronically sign the Legal Agreement(s), any changes to your location(s) will reset your application. You will receive the warning message shown above. All information from that point forward, including the legal agreement signature and questionnaire answers must be provided again. Click "OK."

Warning   ✖

Please note that any changes to your locations will reset your application. Legal agreement signatures and questionnaire answers will need to be provided once again.

22   OK

D Create an Application

23 Review your application invoice. This information has been pre-populated based on information you provided. If your company requires the invoice to be addressed to a separate person or location, or requires additional billing information, you may make the appropriate changes on this page.

24 After you have made any changes, click "Save Changes." You will receive a confirmation that your changes have been saved. Click "OK." To print the invoice, click "Print Invoice." The system will generate a PDF for printing. After generating and printing the PDF, click "Next" to continue.

D Create an Application

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Invoice # MC 17

	Invoice Date	**Due Date**
	24-July-2014	7-September-2014

Billing Contact:

Natural Gas Company
Attn: myCerts User
1224 L ST NW
WASHINGTON, DC 20005-4015
United States

Mailing Contact:

Natural Gas Company
Attn: myCerts User
1224 L ST NW
WASHINGTON, DC 20005-4015
United States

All payments must be made in United States currency. Checks must be drawn from a U.S. bank. You are responsible for all taxes, banking or other service fees, *including all applicable withholding taxes.* If you are paying by electronic transfer, please note **(1) you are responsible for all electronic transfer, A.C.H. and banking fees; (2) for electronic payments not drawn on a U.S. bank a fifty-dollar ($50) handling fee must be added at the time payment is made; and (3) you must reference the Invoice # MC 17 above.** Thank you.

Product Code	Description	Amount
2271	Monogram - API-5CT	$5,000.00
2323	APIQR Application Fee - Registration For API Spec Q1 and ISO 9001	$3,000.00

Facility Number: 10135

Comments:

If you are paying by bank electronic transfer or A.C.H., you MUST have your bank include the invoice # MC 17 . Thank you.

Subtotal	$8,000.00
TOTAL	**$8,000.00**
Payment Received	**$0.00**
Balance Due	**$8,000.00**

CORPORATE SEAL

John Nodine
Official Signature

United States Federal Tax ID No. 13-0433-430

25 The printed Invoice contains the information needed to remit funds to API.

Payment is NOT processed through the website. All payments must be sent to API using the instructions on the printed invoice.

D Create an Application

26 The Application Questionnaire requires you to input information specific to your facility's management system. The red box indicates a required answer. You will not be able to proceed if this information is not provided.

The questions with a gray box are optional depending on the nature of your business.

27 Identify outsourced processes, manufacturing, testing and inspection activities and processes that require validation by adding these items to your application. Complete all fields, then click "Add." You can add other activities and processes by entering additional information and clicking "Add" again. You can delete an entry by clicking the "X" in the red circle on the right of the screen.

28 Enter shift information by entering the hours and number of employees, then click "Add." Add one shift at a time. You can delete an entry by clicking the "X" in the red circle" on the right of the screen.

29 Upload your Quality Manual and Conformity Matrix. These items are required. Recognized file formats include .pdf, .doc, .xlsx. Maximum file size for each file is 15MB. To upload a file, click "Upload File" and follow the screen prompts. You can upload multiple files by clicking "Upload File" again. To delete an uploaded file, click the "X" in the red circle on the right of the file name.

30 When all application questions have been answered and your Quality Manual and Conformity Matrix have been uploaded, click "Save Changes."

API Spec Q1 and API Spec Q2 require separate conformity matrices. Visit the API website (http://www.api.org/certification-programs/api-monogram-program-and-apiqr/applications-forms) to download the API Spec Q1 Conformity Matrix and/or the API Spec Q2 Conformity Matrix.

31 You will receive the following message confirming that your changes have been saved successfully. Click "OK." Click "Next" at the bottom of the page to continue.

D Create an Application

32 The above screen allows you to provide payment information to API and facilitate verification when the payment is received. Select your method of payment from the available options. Payment can be made by Bank Wire, ACH, or Check. Next, you will be asked to provide a Bank Name or Check Number and Remitter Name. The payment method is required in order to proceed.

The invoice you generated in Step 24 shows the amount of the application fee to be remitted to API. If you need to print the invoice again, click "Print Invoice."

33 Click Submit Application.

Only one application can be open (per facility) at a time.

Once you click "Submit Application" you will no longer have the ability to make changes to an application. If changes are required after you click "Submit Application," contact API.

D Create an Application

34 The application receipt confirms that your application has been submitted. To return to the dashboard for this Facility Account, click "Return to Facility Account" at the bottom of the page.

35 You may now return to your Facility List or exit the system by clicking "Log Off" in the top right corner of the screen. If you have created more than one facility, you may continue creating new applications, following the instructions in Section G of this guide.

E Application Status

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1 To determine the status of your application(s), login to myCerts. You will be directed to your Facility Dashboard (or your Facility List if you manage multiple facilities). Click the Facility ID you wish to view.

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2 Click the Application ID number.

3 On the left menu, click "Status Changes."

4 You will be directed to the Status Change History for the application you selected, as shown above.

The review of your application will not begin until API has verified receipt of your payment.

F Review and Correct an Application

1 Once payment for your application is received and confirmed by API, your application will be reviewed by an API Associate for completeness and accuracy. If API has comments regarding your application, you will receive an email notification and your application status will change to "Application (#) requires response." When you receive this email, login to myCerts, locate the Application ID and click on the number. You will be redirected to that application.

Review and Correct an Application

F

2 Click "Questionnaire" on the left menu. Comments from the API Associate will appear on the screen. You can view the entire Questionnaire by scrolling down the page.

3 In the Comments section, type your response addressing the request from the API Associate regarding corrections to your application. When you're satisfied with the response, click "Post."

4 After providing response comments and making any necessary revisions to your application(s), click "Resubmit." When your application is complete and accepted by API, the application status will show as "Accepted."

G Modify an Application in Progress

1 The myCerts website allows you to exit the application process and return to submit an application at a later time. Your changes are automatically saved. To modify an application already in process, login to myCerts. Once logged in, you will be directed to your Facility's Dashboard page or your Facility List if you manage multiple facility locations. Click "Edit" next to the application you want to modify. The application will open where your work stopped. You can click "Back" to return to previous sections of the application.

If you change the location information, you will need to resign the Legal Agreements for each program for which you are applying.

You will not be able to edit an application after you click "Submit Application." You will need to contact API to make any changes at this point.

H Add or Delete Contacts

1 To add/delete contacts, you must first login to myCerts. Follow the login instructions in Section B of this guide. Once logged in, you will be directed to your Facility's Dashboard page or your Facility List if you manage multiple facility locations. Click the Facility ID number.

Only registered primary users can add/delete contacts on a Facility Account. The initial registration instructions can be found in Section A of this guide.

2 From the Dashboard, click the "Facility Details" tab to see information about a facility.

Ⓗ Add or Delete Contacts

3 Under Add Contacts enter the email address of the contact you wish to add.

A "No Match" message indicates that the email address entered does not match an existing account. Click the "Send Invite" link. myCerts will confirm that the invite has been sent to the email address of the contact being added. Notify the new contact to check their email inbox for the invitation. Once the invitation has been received, the new contact should click on the link provided and then register as a new user (see Section A of this guide).

4 To delete a contact, find the contact and the related email address you want to delete. Click on the "X" in the red circle to the right of the contact. Click "Yes" to confirm that you want to delete the selected contact.

I Change User Information
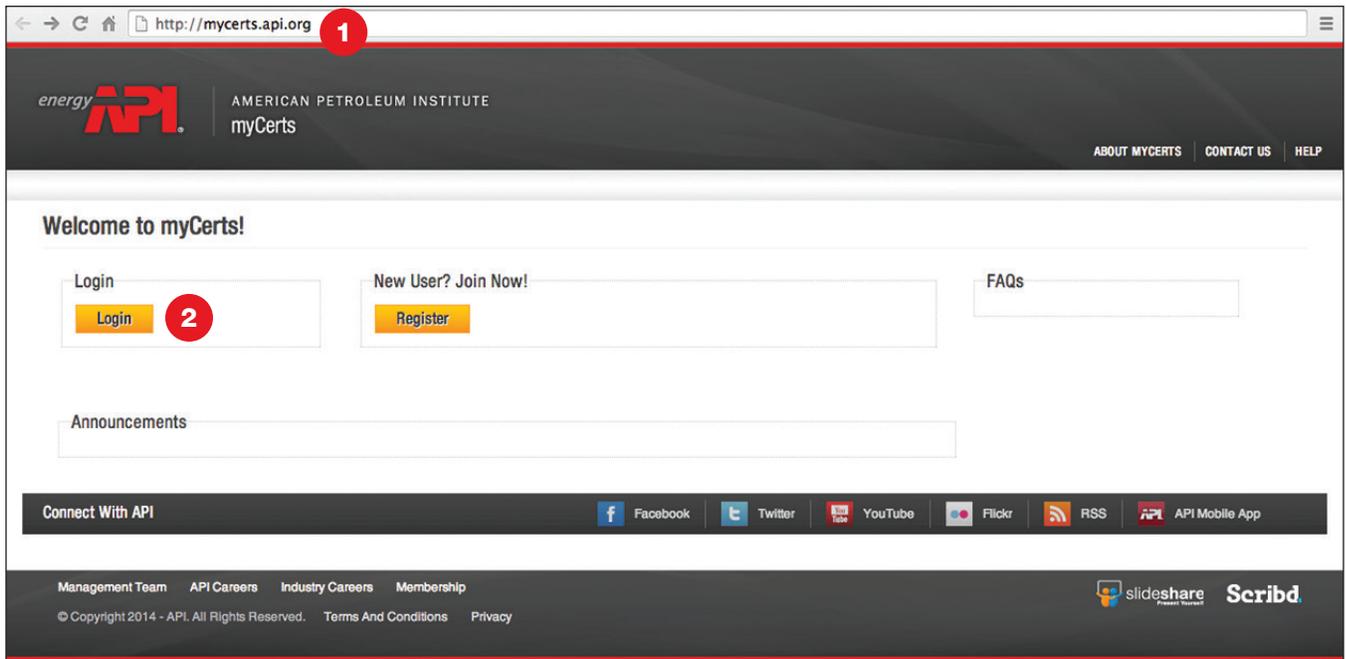
1 If you do not remember your password or want to change it, you will be able to reset it in myCerts. Open your web browser and access myCerts by typing **http://myCerts.api.org** into the browser's address bar. The above myCerts Welcome/Login page will appear.

2 Click "Login" and the login screen will appear.
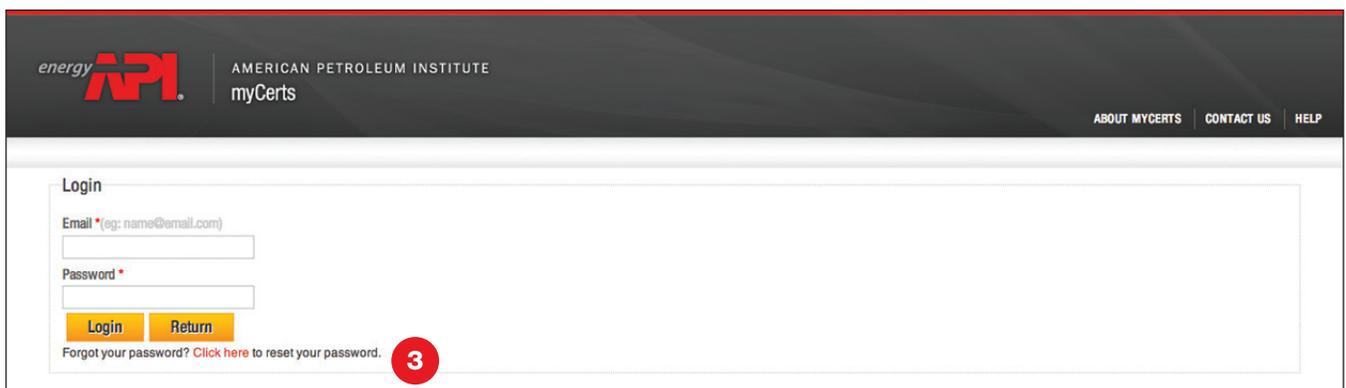
3 Click "Click here" next to "Forgot your password?"

I Change User Information
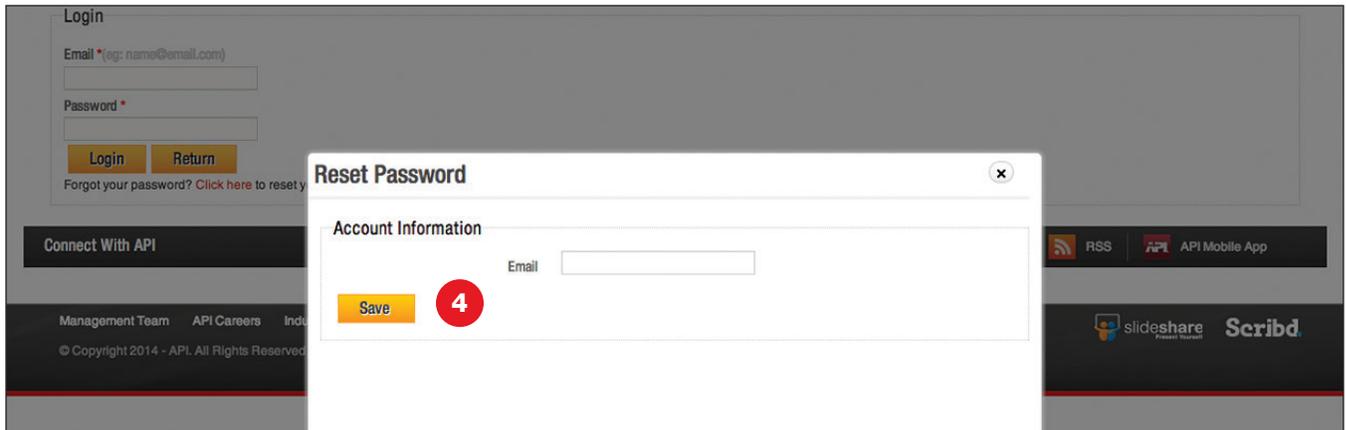
4 Enter your registered email address and click "Save."
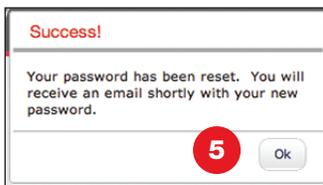
5 A "Success!" notification indicates that an email has been sent to your registered email address with a temporary password. Click "OK." Access your email inbox and open the email from myCerts. Copy the temporary password, click the link in the email. Enter your email address and the temporary password in the spaces provided. Click "Login." Your password is reset and you will be redirected to your Facility's Dashboard page or your Facility List if you manage more than one facility location.
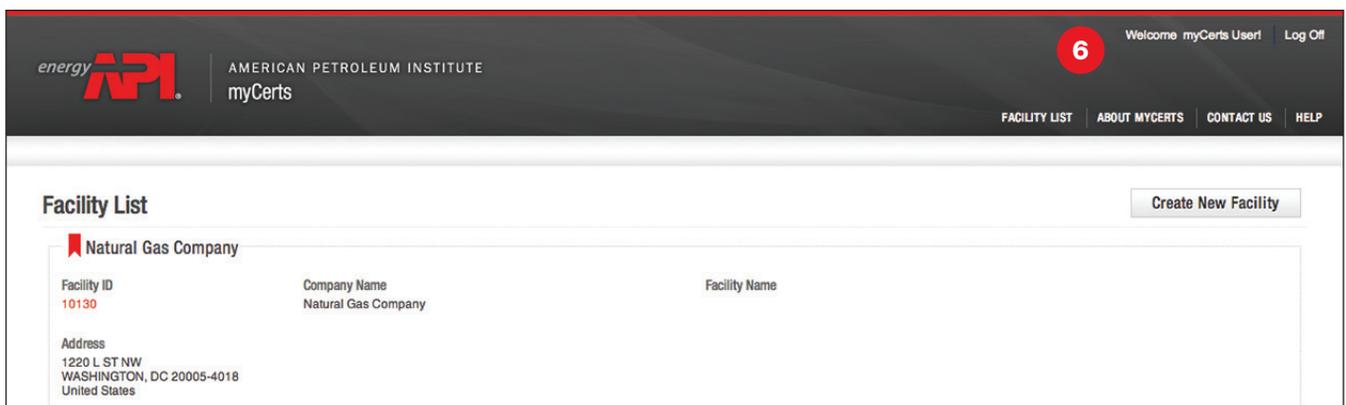
6 To change the temporary password or your login email or to edit your contact information, click on your name in the upper right corner of the screen. Select the option that reflects the change you would like to make.

Ⓘ Change User Information
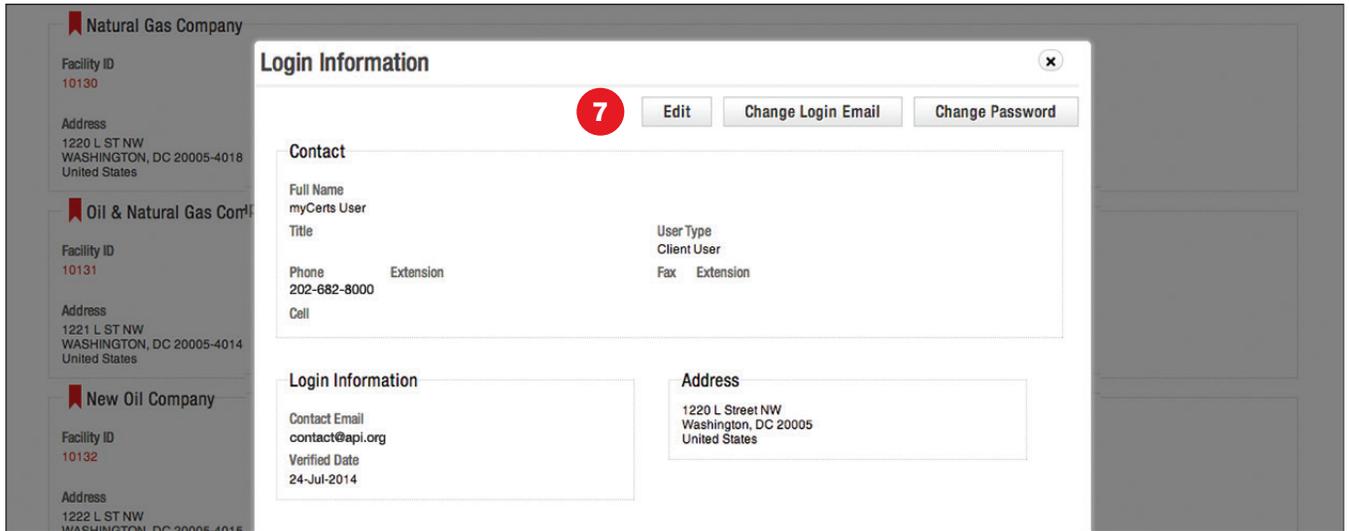
7 The Login Information screen will appear. If you select "Edit," you will be able to change your personal contact information. If you select "Change Login Email," you will be able to change the email address associated with your account. A confirmation email will be sent. If you select "Change Password," you will be able to change your temporary/current password.
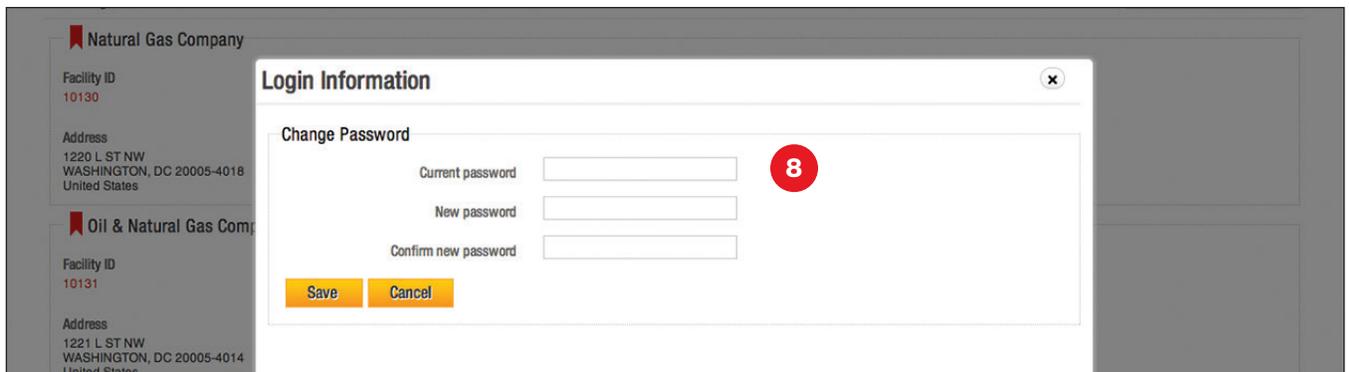
8 Enter and confirm the new password information. Click "Save" and use the new password the next time you login to myCerts.

J Alternative Marking Agreement (AMA)

1 This Agreement will not apply to most API Monogram applicants. Only certain API Specifications and products are eligible.

If you are applying for certain products under API Specs 5CT, 5DP 5L, 7K, 2F, 7F, 9A, 10A, 13A, you have the option to apply for an AMA. For example, only High Pressure Mud and Cement Hoses are eligible under API Spec 7K.

Use this page to confirm whether or not you are applying for an Alternative Marking Agreement. Click "Yes" or "No" and then click "Next."

If you click Yes, you will need to thoroughly review Part 3 – Alternative API Marking Controls of the License Agreement to ensure your eligibility. A hard copy of the document can be found on our website at http://www.api.org/.

For more information regarding this option, contact sales@api.org.

K The Audit Process

1 Most licensees get audited every three years, while others get audited annually, including all APIQR Registered Organizations.

2 The API audit performed at your facility location(s) will be scheduled based on the scope of your license(s)/registration(s) in conjunction with the number of employees at each of your facility location(s).

3 API will assign a qualified Auditor(s) who will contact the facility's management representative to schedule the audit based on API program requirements.

4 You will be notified by API when the audit is assigned and the Auditor will send you a copy of the audit plan prior to the audit.

5 You will need to arrange for the audit team's support, which could include escorts in the facility, safety precautions and restrictions.

6 After the audit is conducted, the auditor will submit the audit report and the findings file, if any, to API for review and determination of licensing/registration.

7 You will be able to monitor the status of your application(s) and audits on your Facility Dashboard. Click the Applications tab to see the status of applications submitted. Click the Audits tab to view and respond to audit findings.

Respond to Audit Findings

1. Once the auditor uploads all required audit documents to API, you will receive an email notification from myCerts. If there were no findings during your audit, no action is required. API will notify you when your audit review is complete and of the action taken. If there were findings during the audit, you will receive an email notification indicating that your audit findings require response.

2. To respond to audit findings, login to myCerts – see Section B. On your Facility Dashboard, click the AUDITS tab.

3. Click the ID number of the audit for which you want to provide responses. Note the status of the audit will be 'Complete.'

L Respond to Audit Findings

4 Once you click the audit ID, you will be routed to your Audit Dashboard, where you will see the findings identified during the audit. You will also see any messages (called Alerts) from API regarding the audit.

5 A finding that requires a response will have a red triangle next to it. Click the finding number for which you want to provide a response. Note that all findings must be addressed before API will review your audit.

Concerns do not require a written response. API will review all Concerns to determine if action is required. If so, the Concern will be upgraded to a nonconformity and a written response will be required. You will receive an email notification from myCerts.

L Respond to Audit Findings

Please refer to the following page for instructions corresponding to the above screen.

L **Respond to Audit Findings**

6 On this screen, you can enter your response to the finding. You must enter the required information in the space provided for the Root Cause Analysis, Corrective Action(s) and the Correction, separately. Once you type the response in the space provided, click "Post." You will need to click "Post" after entering each section's response.

7 If you need to upload documentation as a part of your response to a finding, scroll down to Supporting Documentation. Click "Upload File" and attach supporting documents/evidence.

After posting a response, when you return to your Audit Dashboard, the finding alert next to the finding number for which you posted a response will be gray. When the alert is gray, no action is required from you.

8 If you have more than one finding, click the next finding number and enter the response for that finding in the same manner as before. When you have responded to all open findings, your audit report and responses will be automatically assigned to a Certification Associate for review.

You cannot make changes or submit additional documentation while API is reviewing the audit. If API has questions or needs additional information, you will receive an email message from myCerts with instructions to login to the site.

If you need to make changes while the audit is under review, contact API.

9 Once API reviews your Audit in conjunction with your responses to the findings, you will receive an email notification regarding the status of the review.

10 A notification will also be sent if additional information is required.

Dear myCerts User, **10**

API needs additional information regarding your audit response. The API Associate described what information is still needed under the appropriate finding on the website. All findings myst be closed within 60 days of the last day of the audit.

You can view additional requested actions regarding your recent audit at 25921

You will need to sign in with the login information that was provided in a separate email. If you have any questions please contact the associate assigned to your audit review.

Send an email to the help desk at myCertsSupport@api.org if you have any questions using the myCerts website.

Thank you,
API myCerts

M Automatic Notifications

myCerts messaging will keep you informed about the status of your application(s), audit(s), and any other account related requests or actions taken.

If you have any questions or need assistance with the site or sales support, the API staff is available to assist you.

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