

**2020-21
National Board
Certification
Third-Party Payer
Guide**

Version 1.0

NATIONAL BOARD

for Professional Teaching Standards®

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Introduction

This Guide provides key dates, fee information and instructions for third-party payers (TPPs) making payments for National Board Certification candidates during the 2020-21 assessment cycle.

Overview of Certification

Candidates beginning the National Board Certification process will be able to choose the order in which they complete the components during their candidacy, noting three important requirements: (1) initial attempt of all four components must be completed in the first three years of candidacy, (2) there are two retake opportunities per component (*For Component 1, candidates may elect to retake one or more of the three constructed response items/exercises and/or the selected response item part. Candidates have up to two retakes for each of the four parts of Component 1 at any time during the five-year window.*), and (3) components must be completed in the cycle year in which they are purchased. At its maximum, the process could span five years. Each year, if planning to take components, candidates must register and pay for the components they wish to complete. There is no requirement to complete all components in a single year, but candidates will be able to do so if they choose.

Important Dates and Deadlines

All dates and deadlines are subject to change.

The following chart is applicable to candidates submitting components for scoring during the 2020-21 assessment cycle.

| 2020-21 Important Dates and Deadlines | |
|--|--------------------------------------|
| Registration Window (first-time, returning, and retake candidates) | April 15, 2020-February 28, 2021 |
| Application Window (renewal candidates) | September 1, 2020- February 28, 2021 |
| Fee Payment Deadline | February 28, 2021 |
| Change of Certificate and/or Specialty Area (first-time candidates only) | February 28, 2021 |
| Change of Component Selection | February 28, 2021 |
| Withdrawal Deadline | February 28, 2021 |
| ePortfolio Submission Window | April 1- mid-May 2021 |
| Assessment Center Testing Window | March 1-June 15, 2021 |

Candidate Fees

First-time and Returning Candidate Fees

This chart lists the various fees applicable to 2020-21 first-time and returning National Board Certification candidates. When submitting payment on behalf of a candidate, **you must specify the type of fee for which your organization is paying.**

| Fees for First-time and Returning Candidates | | | |
|--|---|---|---------------------------------|
| Type of Fee | Details | Amount | Deadline for Receipt |
| Registration Fee* | Charged once per assessment cycle. Candidates will not be able to select a component without payment of this nonrefundable and nontransferable fee. | \$75 | No later than February 28, 2021 |
| Component 2, 3, or 4 Fee | Required for each attempt (initial and retake) of all portfolio components. | \$475 | February 28, 2021 |
| Component 1 Fee (first attempt) | Required for the Content Knowledge assessment. | \$475 | February 28, 2021 |
| Component 1 Retake Fee | Required for each portion of Component 1 that a candidate elects to retake. | \$125 per exercise and/or the Selected Response section | February 28, 2021 |
| Component 1 Reauthorization Fee* | If a candidate misses his/her assessment center appointment, or does not cancel 24 hours in advance, he/she must be reinstated before scheduling a new appointment. | \$175 | August 30, 2021 |
| Returned Check Fee* | This fee may be assessed if a candidate's personal check is returned for non-sufficient funds. | \$35 | 30 days after notification |

**Note: This fee must be paid online through the candidate's National Board account via credit or debit card (Visa and MasterCard only), or via electronic check.*

Renewal Candidate Fees

This chart lists the various fees applicable to 2020-21 National Board Certification Renewal candidates. When submitting payment on behalf of a candidate, **you must specify the type of fee for which your organization is paying.**

| Fees for Renewal Candidates | | | |
|---|---|---------|----------------------|
| Type of Fee | Details | Amount | Deadline for Receipt |
| Certification Renewal Fee (renewal candidates only) | Required to apply to renew certification. | \$1,250 | February 28, 2021 |

Third-Party Payer Accounts

Setting-Up and Updating a Third-Party Payer Account

The first step to setting up a third-party payer (TPP) account is to complete the [Third-Party Payer Information Form](#). Before submitting payment for candidate fees, it's important to ensure our records reflect the most current program information for balance reporting and TPP account management. The Third-Party Payer Information Form can also be used to provide us with contact and demographic updates to your existing account.

[Click here](#) to complete the Third-Party Payer Information Form.

Acceptable Payment Types*

The National Board accepts payment from third-party payers in the form of purchase orders, checks, wires, ACH transactions, and the use of existing escrow funds (funds remaining on your TPP account from a previous assessment cycle).

All payments should be made payable to the National Board and should include one of the following:

- Transmittal memo – a list of candidates receiving payment, of whom have completed the appropriate component selection ([see below](#)), and the amount to be applied to each candidate account; or
- A copy of the invoice provided to you by the National Board.

If you require a W-9, an invoice or additional documentation for payment processing, please submit your request via the [National Board third-party payer web form](#).

**Note: Candidates must pay the \$75 registration fee to complete their registration and select components within the National Board Candidate Management System (NBCMS). If you wish to include payment of the \$75 registration fee with component fees, be advised the candidate must be registered in order for the funds to be posted to their account. Candidates will be eligible for a refund of personally paid fees once an overpayment is present on their account.*

Submitting Payments

Purchase orders and requests to use existing escrow funds must be submitted via the [National Board third-party payer web form](#). Please ensure you've completed the [Third-Party Payer Information Form](#) before submitting payment for candidate fees.

All checks must be submitted to the National Board at one of the following addresses:

If sending via regular mail:

National Board for Professional Teaching Standards
P.O. Box 75105
Baltimore, MD 21275-5105

If sending by courier service: (All mail by special couriers should be sent to the actual site address listed below and should reflect Lockbox Services and the Lockbox Number in the reference section of the air bill.)

Lockbox Services 75105
Wells Fargo Bank
7175 Columbia Gateway Drive
National Board for Professional Teaching Standards, Lockbox #75105
Columbia, MD 21046

Managing Candidate Payments*

Payment Requirements for First-time and Returning Candidates

In order for third-party payments to be applied to a candidate's account, the candidate must first complete the appropriate registration requirements. Payments cannot be applied to a candidate's account until the candidate has completed the steps below in the National Board Candidate Management System (NBCMS).

Before submitting a transmittal memo, please ensure that each candidate has completed the following steps:

1. Created an account in the [National Board Candidate Management System](#) (NBCMS).
2. Completed registration for National Board Certification.
3. Paid the \$75 Registration Fee.
4. Completed the component selection process through Step 3: Order Review and clicked "Submit Order" for each component they plan to complete in the current assessment year.

To learn more about NBCMS and the registration process, please review the [Guide to National Board Certification](#) located in the [First-Time and Returning Candidate Resources](#) section of our website.

You are permitted to submit payment for all components (up to \$1900) for an individual in advance of registration for all components. If you choose this option, you will be required to specify the amount of funding to be allocated to a component in each cycle. You must specify your allocations using the Transmittal Memo provided by the National Board (see [Transmittal](#)

[Memo](#)).

Payment Requirements for Renewal Candidates

In order for third-party payments to be applied to a candidate's account, the candidate must first complete the appropriate renewal application requirements. Payments cannot be applied to a candidate's account until the candidate has completed the renewal application. You must specify your allocations using the Renewal Transmittal Memo provided by the National Board (see [Transmittal Memo](#)).

Before submitting a transmittal memo, please ensure that each renewal candidate has completed the following steps:

1. Logged in to their existing account in the [National Board Management System](#) (NBMS).
2. Completed the application for Certification Renewal.

To learn more about NBMS and the registration process, please review the [Renewal Guide to National Board Certification](#) located in the [Renewal Candidate Resources](#) section of our website.

Payment and Transmittal Memo Processing

Upon receipt of the transmittal memo and payment, the National Board will allocate the funds to the candidate accounts as requested within 7-10 business days.

Funds submitted for unregistered candidates and/or components not yet selected by the candidate will be added to your escrow funds. While we will notify you periodically of candidates that have not yet completed the appropriate steps, you will be responsible for verifying candidates have registered for the components you expect to fund annually. If you have questions at any time regarding the balance on account or status of candidate accounts, please submit a request in writing via the [National Board third-party payer web form](#).

**If you are running a program that supports a large number of candidates, please [contact us](#) to determine if your data needs merit access to regular data reporting.*

Transmittal Memos

A completed transmittal memo must be submitted with each payment to indicate how funds will be distributed to candidates. Below you will find links to the various transmittal memos available. If you have questions about how to use these transmittal memos, please contact us via the [National Board's third-party payer web form](#).

[Transmittal Memo](#)

[Renewal Transmittal Memo](#)

Transferring Funds Between Candidates

Funds may be transferred from one candidate's account to another. Requests to do so must be submitted in writing via the [National Board third-party payer web form](#). The request to transfer funds should include the previously funded candidate's name, National Board ID, and amount funded. The request must also include a transmittal memo which includes the new candidate's information.

Refunds

Withdrawals

In the event a candidate withdraws before the withdrawal deadline, you will be eligible for a refund of the fees paid on behalf of the candidate (except those designated as nonrefundable).

The National Board will process withdrawal refunds on a monthly basis and funds will be returned to your TPP account.

If you do not want the funds credited to your TPP account and/or would like the funds returned to your organization prior to our year-end reconciliation, you must submit your request in writing via the [National Board third-party payer web form](#).

You will not be eligible for a refund of any fees paid on behalf of a candidate if the candidate did not withdraw prior to the withdrawal deadline.

Overpayments

In the event a candidate's account becomes overpaid, you may be eligible for a refund of fees paid on behalf of the candidate (except those designated as nonrefundable). Overpayment refunds are processed in the order the payment was received. This means if a candidate already has payment on account when funding is distributed, causing the candidate account to become overpaid, the first payment received will be the first payment refunded.

The National Board will process overpayment refunds on a monthly basis and funds will be returned to your TPP account. If you do not want the funds credited to your TPP account and/or would like the funds returned to your organization prior to our year-end reconciliation, you must submit your request in writing via the [National Board third-party payer web form](#).

Reconciliation of Accounts

The National Board will perform a complete reconciliation of your TPP account after the closing of the assessment cycle, during the months of April and May. Upon completion of the reconciliation, if you have a balance on your TPP account*, you will be provided a year-end report detailing the account activity for the cycle.

**If you do not have a balance on your TPP account and would like a year-end report, please submit your request via the [National Board third-party payer web form](#). If you have a balance on your TPP account at the end of a cycle, you can request that remaining funds be refunded to your organization. Otherwise, the balance will be held as escrow funds for use in a future cycle.*

Contact Us

For questions regarding payment processing, contact us via the [National Board third-party payer web form](#).

For questions regarding National Board Certification candidate processes, call 1-800-22TEACH (83224), Monday–Friday, 8:00 a.m. - 6:00 p.m., CST or use the [National Board candidate web form](#).