

## **Third-Party Payer and Payment Process FAQs**

*Dates and processes are subject to change. Review the [Third-Party Payer Guide](#) for the most up-to-date processes and deadlines. [Contact our Financial Operations team if you have questions.](#)*

### **General**

**Q: What is a Third-Party Payer?**

**A:** A third-party payer is a program/organization who provides incentives for National Board candidates, typically in the form of funding to cover the cost of completing National Board Certification and/or Maintenance of Certification (MOC).

**Q: My organization is interested in funding candidates; how do I create a third-party payer account?**

**A:** Contact our Financial Operations team using the [Third-Party Payer web form](#). Provide your organization name and contact details and they'll get you set up.

**Q: What is a Transmittal Memo?**

**A:** A Transmittal Memo is a form used by third-party payers to submit component funding for registered candidates. This form is submitted with payments and specifies the amount of funding to be allocated to each candidate.

**Q: Where can I find a blank Transmittal Memo?**

**A:** The Transmittal Memo can be found [online](#) and in the [Third-Party Payer Guide](#).

**Q: What are "Promised Funds"?**

**A:** Promised funds are funding for candidates whose allocation has not been exhausted to date. The funds are held until the candidate has purchased all eligible components, until their candidacy has expired, or until we receive a written request from your organization to remove the funding designation.

**Q: How can I get a W-9 form or a Sole Source letter?**

**A:** We will be happy to provide you with the form you need. You can submit your request to us via the [Third-Party Payer web form](#).

**Q: How can I get an invoice?**

**A:** You can submit your request to us via the [Third-Party Payer web form](#). Please include the name of the paying entity, mailing address, and the amount you wish to have on the invoice.

### **Submitting Payment**

**Q: How/where do I submit payment?**

**A:** Please submit purchase orders and requests to use existing escrow funds via the [Third-Party Payer web form](#). Submit checks to:

**If sending via regular mail:**

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National Board for Professional Teaching Standards  
P.O. Box 715105  
Philadelphia, PA 19171-5105

**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 - #0075105  
National Board for Professional Teaching Standards  
MAC Y1372-045  
401 Market Street  
Philadelphia, PA 19106

**Reminder:** A completed [Transmittal Memo](#) must accompany all payments.

**Q: Why does the Transmittal Memo require me to specify between initial and retake funding?**

**A:** Component purchases are designated in our registration system as initial or retake and so the funding designation you provide must match. We cannot apply funding you designate as initial funding to a retake purchase and vice versa. It's important you verify the type of purchase with your candidate prior to submitting your Transmittal Memo. If you submit funding for an initial purchase and need to change the designation to a retake purchase (or vice versa), you will need to submit a new Transmittal Memo and allow additional processing time.

**Q: Our organization covers the nonrefundable \$75 registration fee; is the candidate required to pay the fee up front?**

**A:** Yes. Candidates must pay the \$75 fee at the time of registration using a Visa or MasterCard. If your organization covers the registration fee, you will need to [request a Registration Fee Transmittal Memo](#). Funding will be applied to the candidate's account after they complete registration and a refund of the candidate payment will be processed six weeks later.

## Payment Processing and Usage

**Q: What is the payment deadline?**

**A: New for 2023-24:** The deadline to submit funding for your candidates is February 16, 2024. Candidates will have until February 29, 2024, to use available funding to complete all purchases. No third-party payments will be accepted after February 16, so please plan accordingly.

**Q: When/how will a candidate know if funding is available to them?**

**A:** Designated funding will be visible to candidates in the *Available Funding* section of the *Payment Portal* in their National Board account. Note: It takes **5-7 business days from receipt of funding (check, wire, purchase order or ACH transaction) by our office** for funding to be posted to a candidate's account. Candidates should be mindful of the processing time.

**Q: How does a candidate apply funding to their purchase?**

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**A:** After selecting the component they wish to purchase, the candidate will click the *Complete Payment* button to complete the purchase. Available funding will automatically be applied to the purchase during check-out. Note: The candidate is still required to complete the check-out process – purchases will not be completed for them regardless of funding availability.

**Q: What is the purchase process for candidates who receive partial funding?**

**A:** If a candidate receives funding that is less than the full amount of the component, they will be required to pay the remaining balance at the time of purchase. The available funding will automatically be applied to the purchase during check-out and the candidate must click the *Pay Now* button to pay the balance due. The remaining balance cannot be paid at a later date and must be submitted using a credit card. The National Board payment plan is not an option for partial funding.

**Q: Will candidates have a record of what they pay for using third-party funds?**

**A:** Yes. Candidates can view their purchase history from the *Payment Portal* in their National Board account. There is an option for candidates to save and/or print a receipt.

**Q: What if a candidate decides not to purchase a component for the most current cycle?**

**A:** They do not need to take any action. Any unused funds will remain on the candidate's account as promised funds, or will be returned to the third-party payer's account.

**Q: What if a candidate wants to withdraw his or her component?**

**A:** Candidates who wish to withdraw must do so directly from their National Board account. Each component must be withdrawn individually using the *Withdraw* button. Candidates who withdraw by the published withdrawal date will be eligible for a refund of the component fee. Refunds for withdrawn components funded by a third-party payer will be applied to the candidate's account in the form of available funding, but may be applied to the third-party payer account at the third-party payer's request. Refunds will be processed per the timelines noted in the [Third-Party Payer Guide](#) and [Guide to National Board Certification](#).

## Support Resources

[Third-Party Payers](#)

[Candidate Support Leaders](#)

[Support for Candidates and Maintenance of Certification](#)

[Candidate Center](#)