

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 [Partner Portal Support 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: What is the Partner Portal?

A: The [Partner Portal](#), is a new system enabling National Board Partners, third-party organizations that support candidates, to fund and track candidates through the National Board certification process in real-time.

The Partner Portal aims to streamline processes in the following areas:

- Designation processing timelines
- Visibility into candidate funding use
- Timing of financial reports

We are implementing a phased approach to the portal rollout, ensuring a smooth transition, and easier adoption of the new system. We'll provide additional details, instruction, and user guides as they become available. Resources will be available on our [Third-Party Payer web page](#).

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

A: The first step to funding candidates is to create a third-party payer account with the National Board. If your organization is interested in funding candidates, please [contact us](#) and provide the following information: organization name and mailing address, the name, email and telephone number of the primary contact for your organization who will manage the funding.

Your request will be forwarded to a member of our team for review and account creation— this will take up to seven business days. Once your third-party payer account has been created, you'll be asked to sign a user agreement, then given access to the Payment Portal. Check your email regularly for updates and be sure to have No-Reply@NBPTS.org added to your organization's whitelist.

Q: My organization already has a third-party payer account; how do I access the Partner Portal?

A: If your organization funded candidates prior to the implementation of the Partner Portal, your third-party payer account data has been migrated to the Partner Portal. In mid-April, you were sent an email containing instructions for accepting the user agreement and accessing your account in the Partner Portal. If you didn't receive the email or if you aren't sure if your organization already has an account with us, please [contact us](#) for assistance.

Q: What are “Promised Funds”?

A: Promised funds are funds for candidates whose allocation has not been exhausted by the registration window for the 2024-25 cycle. Any promised funding not used by February 28, 2025, will not be held and will be returned to your organization’s escrow account at the end of the cycle. Note: This is a change directly related to the implementation of the new Partner Portal.

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 [Partner Portal web form](#).

Q: How can I get an invoice?

A: You can view and print invoices directly from the [Partner Portal](#) for purchase orders already submitted. If you have not submitted a purchase order, please submit your request to us via the [Partner Portal web form](#). Be sure to include the name of the paying entity, mailing address, and the amount you wish to have on the invoice.

Submitting Payment and Designating Funding

Q: How/where do I submit payment?

A: Purchase orders, credit card payment, and requests to use existing escrow funds must be submitted via the [Partner Portal](#). 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 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

Beginning with the 2024-25 cycle, Third-Party Payers will not need to submit a Transmittal Memo with payment.

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 [designate the registration fee funding to the candidate directly through the Partner Portal](#). 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.

Q: I have already allocated funding to a candidate; how do I make changes?

A: If you need to transfer funding from one candidate to another, change the component being funded for a candidate, or remove funding from a candidate completely, you will be able to do so at any time through the Partner Portal. Reminder, the deadline to make designation changes for the 2024-25 cycle is February 21, 2025.

A user guide for this process will be available in July and accessible within the Partner Portal when available

Q: One of my candidates has withdrawn. Will a refund be provided?

A: 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 remain designated to the candidate's account for future use.

If you do not want the funds to remain on the candidate's account and would like the funds returned to your organization's escrow account, you must remove the funding designation within the Partner Portal by the specified deadline. If you want the money refunded to your organization [submit your request in writing](#) after removing the designation from the candidate's account.

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 published withdrawal deadline.

Payment Processing and Usage

Q: What is the payment deadline?

A: New for 2024-25:

- The deadline to submit funding for your candidates is February 7, 2025.
- The deadline to designate new funding and change existing funding designations is February 21, 2025.

Candidates will have until February 28, 2025, to use available funding to complete all purchases. **No third-party payments will be accepted after February 7**, 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.

Q: What is the expecting funding option and how does a candidate utilize the option for third-party funding?

A: Beginning in 2024-25, candidates will have the option to indicate they are expecting funding for each selected component on their National Board account during the checkout process. Candidates who utilize this option will have the components automatically purchased when you designate funding to their account.

Candidates who do not utilize the expecting funding option will need to complete their purchases themselves, using the available third-party funding.

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 your third-party payer account and available for designations - funding will be visible to candidates upon designation.

Q: How does a candidate apply funding to their purchase if they didn't select the expecting funding option?

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 unless they previously selected the expecting funding option.

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 if requested.

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. You may remove funding at any time prior to the deadline via your partner portal account. 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](#)