National Board Certification Third-Party Payer Guide

Version 2.3

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NATIONAL BOARD

for Professional Teaching Standards®

Contents

Introduction

This guide provides key dates, fee information, and instructions for third-party payers submitting payments and designating funding for candidates pursuing National Board Certification and for NBCTs completing Maintenance of Certification (MOC).

Overview of Certification

National Board Certification is an advanced, voluntary professional certification that recognizes accomplished teaching practice against National Board standards. Candidates earn certification by completing four required components during a candidacy window.

Candidates beginning the National Board Certification process are able to choose the order in which they complete the components during their candidacy, noting three important requirements:

1. **The initial attempt of all four components must be completed in the first three years of candidacy.**
2. There are two retake opportunities per component.
    a. 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.
    b. Candidates have up to two retakes for each of the four parts of Component 1 at any time during the five-year window.
3. Components must be completed in the cycle year in which they are purchased.

At its maximum, the process could span five years. Each assessment cycle, candidates register and select/purchase the component(s) they plan to complete that year, using available funding (including third-party designated funds, when provided). There is no requirement to complete all components in a single year, but candidates may do so if they choose.

MOC is a separate process for NBCTs to maintain their certification; MOC candidates register and purchase MOC within an assessment cycle, **using available funding (including third-party designated funds, when provided)**

National Board Partner Portal

Partner Portal allows National Board Partners, including Third-Party Payers and Candidate Support Providers (CSPs), to fund candidates and track their progress through the certification process in real time.

Through the Partner Portal, partners can:

- Submit and manage designation requests
- View how candidate funds are applied
- Access timely financial reporting

User guides and short demo videos are available on the **Third-Party Payer web page** to support partners in using the Partner Portal.

Candidate Fees

Fees and payment processing are subject to change.

This section outlines the National Board certification and Maintenance of Certification fees that may be funded by Third-Party Payers. Fees not listed here are the responsibility of the candidate.. Refer to the *Important Dates and Deadlines* for payment deadlines.

Type of Fee	Amount
Registration Fee Charged once per assessment cycle. Candidates will not be able to select a component/MOC without payment of this nonrefundable and nontransferable fee.	$75
Component 1 Initial Fee Required for the initial attempt of the component.	$475
Component 1 Retake Fee Required for each individual part of Component 1 that a candidate elects to retake.	$125, per part
Components 2, 3, and 4 Fee Required for each attempt (initial and retake) of these components.	$475
Maintenance of Certification (MOC) Fee Required to for each attempt of MOC. (NBCTs have two MOC opportunities.)	$495

Important Dates and Deadlines

All dates and deadlines are subject to change.

The following chart is applicable to all candidates submitting components for scoring during the 2025-26 assessment cycle.

2025-26 Important Dates and Deadlines	
Third-Party Payer Deadlines	
Third-Party Payer Funding*	February 6, 2026
Third-Party Payer Designations/Component Changes**	February 20, 2026
Maintain Promised Designations	April 30, 2026
Candidate Deadlines	
Registration Window (all candidates)	May 22, 2025-February 28, 2026
Candidate Registration and Fee Payment Deadline	February 28, 2026
Change of Certificate and/or Specialty Area (first-time candidates only)	March 20, 2026
Change of Component Selection***	February 28, 2026
Withdrawal Deadline	February 28, 2026
Component 1 Scheduling Window Opens	January 15, 2026
Component 1: Content Knowledge Testing Window	March 1-June 15, 2026
ePortfolio Submission Window	April 1-May 16, 2026
Score Release (all candidates)	On or By December 5, 2026

The following chart is applicable to all candidates submitting components for scoring during the 2026-27 assessment cycle.

2026-27 Important Dates and Deadlines	
Third-Party Payer Deadlines	
Third-Party Payer Funding*	February 8, 2027
Third-Party Payer Designations/Component Changes**	February 22, 2027
Maintain Promised Designations	March 31, 2027
Candidate Deadlines	
Registration Window (all candidates)	June 1, 2026-February 28, 2027
Candidate Registration and Fee Payment Deadline	February 28, 2027
Change of Certificate and/or Specialty Area (first-time candidates only)	March 19, 2027
Change of Component Selection***	February 28, 2027
Withdrawal Deadline	February 28, 2027
Component 1 Scheduling Window Opens	January 15, 2026
Component 1: Content Knowledge Testing Window	March 1-June 15, 2027
ePortfolio Submission Window	April 1-June 15, 2027
Score Release (all candidates)	On or By December 4, 2027

**This is the final date we will accept funding from third-parties. ** This is the final date for third-parties to allocate new funding or to change existing funding designations (component selections) to candidate accounts. Candidates will be allowed to purchase components through February 28. ***Candidates who change to a non-third-party funded component after the designation deadline will have to pay the component fee out of pocket.*

Candidate Eligibility Requirements

To be eligible to achieve National Board Certification, initial candidates must meet the education, licensure, and employment requirements described below. World Languages candidates must also meet the language proficiency requirement.

The rules for meeting eligibility for candidacy are described in the [Guide to National Board Certification](), but teaching situations across the country vary widely, and the rules may not address a candidate's particular circumstances. Candidates should contact Customer Support for assistance if they are not sure they meet the eligibility requirements.

The chart below provides the certification eligibility requirements for beginning the National Board Certification process and when each requirement must be met.

Eligibility Requirement	Requirement Must be Met
Education: Candidates must hold the minimum of a bachelor's degree from an accredited institution. Career and Technical Education (CTE) candidates only need a bachelor's degree if their state requires one for the teaching license they currently hold.	**Before registration.** Candidates must meet this requirement before they register and purchase their first component.

Licensure: Candidates must hold a valid state teaching license or meet their state's licensure requirements. School Counseling (SC) candidates must hold a valid state School Counseling license. Important Note: Candidates must also hold a valid license for each of the three years they verify toward the employment requirement.	**Before registration.** Candidates must meet this requirement before they register and purchase their first component.
Employment: Candidates must successfully complete three years of teaching at one or more early childhood, elementary, middle, or secondary schools. School Counseling (SC) candidates must successfully complete three years of serving as a School Counselor at one or more early childhood, elementary, middle, or secondary schools.	**No later than June 30 of the third year of candidacy** This requirement must be met for candidates to be eligible to achieve certification. Candidates will achieve National Board Certification when they meet all score requirements, and all eligibility requirements.
Language Proficiency Requirement: World Languages candidates must meet the ACTFL language proficiency requirement.	**No later than June 30 of the year in which they complete the initial attempt of all four components.** World Languages candidates will achieve National Board Certification when they meet all score requirements, the ACTFL requirement, and all eligibility requirements.

Third-Party Payer Accounts

Setting Up a Third-Party Payer Account

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.

If your organization previously funded candidates, your third-party payer account is available in the Partner Portal. If you're unsure whether your organization already has an account or need help accessing it, please contact us for assistance.

Managing Candidate Payments

Candidate Requirements for Third-Party Funding

To receive third-party funding, candidates must have an active National Board account in the Pearson Educator Portal.

Candidates must also authorize the release of their name and candidacy details to third-party organizations. Without this authorization, candidates will not appear on Partner Portal reports.

To avoid funding issues, ensure candidates have an active account, a National Board candidate ID, **and** an approved release on file. New candidates must complete account setup and release authorization before funding is applied. Returning, retake, and MOC candidates will continue using their existing account, candidate ID, and release settings.

During registration, candidates may indicate they are expecting third-party funding for specific components. When this option is selected, components are automatically purchased once funding is designated. If not selected, candidates must complete the purchase themselves using available funds.

For details on candidate registration and account setup, refer to the ***Guide to National Board Certification***.

Acceptable Payment Types

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

All payments must be made payable to the National Board and should include a copy of the invoice provided to you by the National Board when paying for outstanding purchase orders.

If you require a W-9, a preliminary invoice, ACH, or additional documentation for payment processing, please contact us.

Invoices

Invoices for purchase orders that have been submitted and approved in the Partner Portal are available in the Partner Portal on the *Purchase Order Breakdown* page. Third-party payers are responsible for accessing and downloading invoices from this location to complete payment. For additional guidance, refer to the ***Funding Setup and Designation User Guide*** on the Third-Party Payers page. Requests for quotes or preliminary invoices must be submitted prior to payment and require contacting us with the appropriate invoice details.

Submitting Payments

Purchase orders, credit card payments, 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

Reminder: Third-Party Payers no longer submit a transmittal memo for funding designations. Funding is applied directly to candidate accounts in the Partner Portal.

Payment Processing

Approximately 5–7 business days after receipt of your payment, funds are available to be applied to candidate accounts in the Partner Portal. If you have questions about your account balance or payment status, please contact us.

Designating Funds to Candidates

Designating funding is the act of assigning funds to an individual candidate in the Partner Portal to support the purchase of National Board Certification components and MOC. Once designated, the funds are reserved for that candidate and cannot be used by others unless the designation is changed or removed. After payment is processed, partners apply available funds to candidate accounts based on their funding commitments.

Detailed instructions for designating funds are available in the ***Funding Setup and Designation User Guide*** on the Third-Party Payer page.

Changing Funding Designations

If you need to transfer funding from one candidate to another, change the component being funded, or remove funding from a candidate, you can do so through the Partner Portal **before the funding designation deadline**. Detailed instructions are available in the ***Funding Setup and Designation User Guide***. All changes must be completed by the applicable deadline listed in the Important Dates and Deadlines chart..

Maintain Promised Designations

After the close of each registration window, unused designated funds remain for candidates who did not purchase the assigned component. Prior to cycle close-out, third-party payers are required to determine how the unused funds will be managed **by the deadline listed in the Important Dates and Deadlines chart**.

Unused funds may either remain designated to individual candidate accounts for use in a future cycle (action required within Partner Portal) or be returned to the third-party payers escrow account during cycle close-out (no action required).

Refunds

Refund eligibility and funding removal are determined by candidate withdrawal status and third-party payer action within published deadlines. The scenarios below outline how designated funds are handled based on candidate activity and required actions in the Partner Portal.

When a candidate withdraws by the published withdrawal deadline, designated funds are reversed from the purchase. If you do not release the funds for a refund, the funding remains on the candidate's account as a pending designation.

Note: You may request reversal and refund of funding applied to a component prior to the published withdrawal deadline, even if the candidate has not yet completed a withdrawal in their National Board account. However, candidates should be encouraged to complete the withdrawal themselves.

If a candidate completes a component purchase and does not withdraw by the published withdrawal deadline, the funding is considered utilized and remains associated with the completed purchase. Utilized funding is not eligible for refund after the withdrawal deadline.

To have unused or pending designations refunded to your organization, submit a request through the *Manage Refunds* tab in the Partner Portal. Detailed instructions are available in the ***Funding Setup and Designation User Guide***.

Reports and NBConnect

As of May 1, 2026, all NBConnect reports are available exclusively in the Partner Portal.

The Partner Portal contains the same data and functionality previously available in NBConnect, including *Candidate Information reports*, standard reports for common scenarios, and access to requested reports for download.

Third-Party Payers also have access to organization-specific financial data in the Partner Portal, including Account Activity and Balance, Approve Purchase Order, and Completer reports.

The ***Standard Reporting User Guide*** includes instructions for customizing reports, applying filters, and referencing report field definitions.

Exceptions

This Third-Party Payer exception policy takes into consideration the exception policy for candidates. Please review the candidate exception policy in the Guide to National Board Certification.

If you, or a critical team member, have encountered a hardship that has caused you to miss funding and designation deadlines, the National Board may consider offering an exception to deadlines and policies. All requests are evaluated on a case-by-case basis and will be reviewed until the registration deadline.

The National Board will consider Third-Party Payer exception requests based on personal and/or family illness, military deployment, death of an immediate family or school community member, adoption, visa rejection, divorce, and natural disaster. Administrative errors in candidate designations are not considered a hardship and will not qualify for an exception request.

Requesting an Exception

In limited circumstances, Third-Party Payers may request an exception to funding or designation deadlines. For an exception request to be considered, you must submit evidence of the hardship that will prevent or has prevented you from meeting the funding and/or designation deadlines. Submitting a request with supporting documentation does not guarantee an exception to policy will be approved.

To submit an exception request:

1. **Describe your situation that qualifies for an exception**. You should include the specific amount of extra time (or other relief) you are requesting.

2. **Collect documentation to support your exception request**. Screenshots of your documentation are permitted. Documentation may include, but is not limited to, evidence of:
    a. a medical leave of absence from work, e.g., approved FMLA documentation,
    b. a personal or family medical condition on physician/medical group letterhead, signed and dated, or
    c. a hardship or leave of absence from work on school/district administrative letterhead, signed and dated.

3. **Prepare your documentation**:
    a. Do not include Sensitive Personally Identifiable Information (SPII). SPII is defined as information that if lost, compromised, or disclosed could result in substantial harm, embarrassment, inconvenience, or unfairness to an individual. Black out SPII such as social security numbers, medical insurance information, credit and debit card numbers, and driver's license and state ID information.
    b. Do not submit copies of text messages, news articles, invoices, bills, or insurance claim documents, as they are not considered sufficient documentation for an exception request. Ensure that your documentation clearly demonstrates the direct impact of the hardship on your ability to meet the required deadlines.

Send your documents using the Partner Portal web form.

Candidate Exceptions Impacting a Third-Party Payer
If an exception granted to a candidate causes a delay in meeting your funding or designation deadlines, the National Board will offer you an exception to the deadlines.

For an exception to be considered, you must include the candidate's ID for the approved exception and the specific amount of extra time you are requesting to fund or designate.

For more information on this exception service, please contact our Partner Portal Customer Support team.

Contact Us

You can contact our Partner Portal Support team by phone at 877-370-1524, Monday-Friday, 8am-5pm, CT. Please note that due to the complex nature of some questions, you may need to contact us via the Partner Portal web form located online. See the chart below for details:

Topic	Phone	Web Form
Account Support and Set-Up • Assistance related to setting up accounts, user profiles, and permissions. • Guidance on navigating the Partner Portal.	X	X
Processing User Agreements • Submitting and reviewing user agreements.		X
Password Resets • Help with resetting passwords for secure access.	X	X
System Troubleshooting • Addressing technical issues or errors encountered within the portal.	X	X
Reporting Help (Portal-Specific) • Clarifications on generating reports or understanding data within the portal.	X	X
General Third-Party Payer Process • High-level inquiries about processes, policies, and procedures.	X	X
Account Status • Detailed account-related queries requiring comprehensive research.		X

For questions regarding National Board Certification candidate processes, please continue to contact our Customer Support team.