National Board
Third-Party Payer (TPP)
Onboarding Training
Introductions

What is a Third-Party Payer?
Third-Party Payer (TPP) is the term used to describe an organization (often a school district or state agency) which provides funding to the National Board on behalf of candidates to help offset the cost of NB certification.

What is Pearson’s role in this process?
Pearson supports many operational aspects of National Board certification, including managing candidate registration and payment processing and works closely with TPPs. Pearson is developing a Relationship Manager role that will work closely with TPPs and a key task is to help onboard and train them. This training represents our standard process, but some TPPs have unique requirements.
The Candidate Journey at a Glance
The Candidate Journey at a Glance (cont’d)

- All candidates are provided with a five-year window to attempt certification, beginning the cycle year their first component is purchased. Example: A candidate who begins in 2019-20 will have through 2023-24.
- Each of the four components must be attempted within the first three years of candidacy. Candidates who do not meet this requirement will have their candidacy expired.
- Components may be taken in any order.
- Up to two retake attempts per component (or part of Component 1).
Assessment Calendar at a Glance

What is an Assessment Cycle?
A cycle begins with registration in April of year one and ends with score reporting late in year two.

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Registration for each assessment cycle begins in April and ends in February of the following year. This April-February window includes registration and component purchase deadlines.

Component 1 testing and submission of Components 2-4 takes place in the Spring, after the registration window has ended.

Scoring occurs in the summer, with scores being released no later than December. After score release we can provide you with reports which detail candidate completion activity.
Fees and Purchasing

Basic Fees
Registration Fee: $75, assessed each cycle
Candidate Component Fee: $475 each component (there are 4 components)

*Note: The registration fee is not typically paid by third-party payers.

Candidate Registration and Component Purchase
- Creating an account: National Board Candidate Management System (NBCMS)
  - Candidates are given a National Board ID
- Registering: includes selecting certificate area, paying $75 registration fee.
- Purchasing a Component: In order to have TPP funds posted to their account, candidates must complete the Component Purchase process through “Step 3: Order Review” and click “Submit Order”.

NATIONAL BOARD for Professional Teaching Standards®
Candidate Payments Process

Becoming a Third-Party Payer (TPP)
Complete the Third-Party Payer Information Form then we will create your National Board account and provide you with a Third-Party Payer ID number and a W-9 so that you can set us up as a vendor in your system.

Funding Candidates
The National Board accepts the following forms of payment from third-party payers:
- purchase orders
- checks
- wire transfers
- ACH transactions

Payments are categorized as:
- **Designated (Promised) Funds**: funding you have allocated for a specific candidate that has not been posted to the candidate's account. It will remain available until the candidate selects the required component(s).
- **Undesignated Funds**: funds that are not allocated to a candidate; you can request to hold these funds in an escrow account for use at any time. Because candidates are required to have completed the initial attempt of all four components within the first three years of candidacy, any designated candidate funds not used within three years will automatically be relabeled as “undesignated” and can be used to fund another candidate or refunded.
A Transmittal Memo is the form that tells us exactly how to use your funds and must accompany all payments. Payments are due by **February 28** and may be submitted via mail or online using the [Third-Party Payer web form](#).

**Completing the Transmittal Memo**
- Complete the “Paying Agency Information”
- In “Candidate Information” list name and **National Board ID** for each candidate
- In “Component Information” specify amount for each candidate and which components
- Complete one line for each component being funded
  - You must specify the components for each candidate.
  - If funding one, two or three components for a single candidate, list the candidate once for each component.
  - If funding all four components, select C1-C4 from the Component Number drop down menu.
- Save a copy for your records and submit the Transmittal Memo with your payment.
How to Pay

There are multiple ways a Third-Party payer can providing funding to NB.

**Purchase Order** - send PO and Transmittal Memo using the Third-Party Payer web form.

**Checks** - must be mailed to:

- National Board
c\o Wells Fargo Bank
P.O. Box 75105
Baltimore, MD 21275-5105

**Wire transfer or ACH** - please [contact us](mailto:contactus) for setup instructions.
Reports and NB Connect

Various reports are available to help you track and manage candidate payments.

- NBConnect*:  
  - National Board’s online system with access to candidate data, including registration and component purchase status
- Year End Balance Report:  
  - Summary of payments and refunds for the current assessment cycle provided late summer.
- Completer Report:  
  - After score release, provides the completion status of a candidate’s components and achiever status
- Ad Hoc: If you require specific reports, let us know

* For access to NBConnect, your organization will be required to complete a NBConnect Application.
Withdrawals and Refunds

There are three types of candidate withdrawals:

- **Component Withdrawal:**
  - Candidates can withdraw one or more components. If they still have at least one purchased component, they are active for the cycle and the year counts as attempt.
  - After February 28, components cannot be withdrawn.

- **Registration Withdrawal:**
  - Candidates may withdraw their registration but leave their account intact and the cycle year will not count as an attempt.

- **Automatic Withdrawal:**
  - After the February 28 withdrawal deadline has passed, we automatically withdraw any registrations that does not have associated component purchases.
  - Candidates must have at least one component purchased in order to remain an active candidate for the cycle.

General Notes:
- Candidates who withdraw by February 28 are eligible for a refund of all component fees.
- No refunds after February 28 and fees cannot be transferred to a future cycle.
- The registration fee is nonrefundable.
TPP Refund Types

There are two refund options available to you:

- **Immediate Refund:**
  - You may request all funding be returned via check at the time of the withdrawal (processing time is 4-6 weeks).

- **Cycle Close Out Refund:**
  - At the close of each cycle (summer), you can request all undesignated funds be kept in escrow to fund future candidates or have all undesignated funding refunded.

**Note:** Because candidates are required to complete an initial attempt of all four components within the first three years of candidacy, any designated candidate funds not used within three years will automatically be relabeled as “undesignated” and can be used to fund another candidate or refunded.
Support and Resources

Questions? Contact Us

● Online
  ○ Submit questions and Transmittal Memos using the Third-Party Payer web form located on the Contact Us page of the National Board website.

● Phone
  ○ 1-800-22TEACH
  ○ Monday through Friday from 8 AM-6 PM, Central time

Resources

● Third-Party Payer Guide
● Guide to National Board Certification (for Candidates)
● NBConnect
● FAQs