# THIRD-PARTY PAYER AND PAYMENT PROCESS FAQS
Last Modified Date: April 2025

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.

## Introduction and Account Management

**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: How do I become a Third-Party Payer and obtain necessary forms like a W-9 or Sole Source letter?**
**A:** To become a Third-Party Payer (TPP), follow these steps:
1. **Submit a Request:** Submit your request using the [Partner Portal web form](#) with your organization details and primary contact information. If you need us to provide any specific forms (e.g., W-9, Sole Source letter) or complete any vendor documentation, please include these requirements in your request.
2. **Account Creation:** Your request will be reviewed, and your TPP account will be created within seven business days. You'll be asked to sign a user agreement and will be given access to the [Partner Portal](#). The Partner Portal is an online system that allows TPPs to manage funding, track candidate progress, and access financial reports in real-time.
3. **Check Your Email:** Regularly check your email for updates and ensure that [No-Reply@NBPTS.org](#) is added to your organization's whitelist.

**Q: What are the important deadlines for submitting payments and designating funds?**
**A:** The following dates and deadlines have been established for Third-Party Payers who are funding candidates in the 2025-26 assessment cycle:
- **Third-Party Payer Funding Deadline: February 6, 2026.** This is the final date to add funds to your third-party payer account for use this cycle. **Note:** Purchase Orders (POs) submitted by this date will meet the deadline.
- **Third-Party Payer Designation Deadline: February 20, 2026.** This is the final date to designate funds to candidates and/or make changes to their designations. **Note:** TPPs who miss this deadline can request an exception using the [Partner Portal web form](#).

**Q: What processes and tools do Third-Party Payers (TPPs) use to manage funding and support candidates?**
**A:** TPPs use the [Partner Portal](#) to manage funding and support candidates. The Partner Portal allows TPPs to:
- Create and manage their TPP account
- Submit payments
- Designate and manage funds
- Access financial reports

- Monitor candidate progress

**Q: How do I access and navigate the Partner Portal to manage my TPP account?**
**A:** If you are a TPP Primary or Secondary user, log in to the Partner Portal and navigate to the TPP Management section. Click on the "View TPP Details" tile to access your account details. On the View TPP Details page, select the specific TPP account you wish to view by clicking on its name. This will display details about the TPP, including demographic information and balance summaries.

**Note:** The Partner Portal system launched in April 2024. If your organization funded candidates prior to its launch, your third-party payer account data was transferred to the Partner Portal. You should have received an email with instructions for accepting the user agreement and accessing your account. If you didn't receive the email or are unsure if your organization has an account, please contact us for assistance.

**Q: What do the funding categories and terms on the View TPP Details page mean?**
**A:** The View TPP Details page in the Partner Portal shows several important funding categories and terms for Third-Party Payers (TPPs):
- **Escrow:** Unused cash payments from previous cycles, available for future designations or refunds.
- **Current Funding:** Cash payments for the current cycle.
- **Purchase Orders:** Orders placed for the current cycle.
- **Accounts Receivable Balance:** Amount due to the National Board.
- **Funded Amount:** Total amount submitted in cash or Purchase Orders.
- **Refundable Amount:** Amount eligible for refund.
- **Available Funding Amount:** Amount available to fund candidates.
- **Promised Funding:** Funding designated to candidates, waiting to be used. *
- **Fully Distributed Total:** Funding designated to candidates and used to purchase components.

For detailed descriptions, check the Partner Portal Glossary under the "Funding" tab.

*****Regarding Promised Funding:** Beginning with the 2024-25 cycle, you will need to choose the Maintain Designation option for the funding to remain designated to candidate accounts. You will have from March 1-March 30 each year to make this selection. If you choose not to maintain funding, or miss the deadline, all unused funds will be returned to your National Board escrow account.

## Payment Methods

**Q: What payment methods are accepted by the National Board?**
**A:** The National Board accepts checks, credit cards (MasterCard and Visa), purchase orders, contract purchase agreements, wire transfers, and ACH transactions. **Note:** As of the 2024-25 cycle, Third-Party Payers no longer submit a Transmittal Memo with payment.

**Q: Where do I send checks for payment, and how long does it take to process?**
**A:** Send checks to:

- **Regular Mail:** National Board for Professional Teaching Standards, PO BOX 715105, Philadelphia, PA 19171-5105
- **Courier Service:** Lockbox Services - #0075105, National Board for Professional Teaching Standards, MAC Y1372-045, 401 Market Street, Philadelphia, PA 19106

Processing takes approximately **7 business days** after receipt of payment. You will receive an automated email once the payment is complete. **Note:** As of the 2024-25 cycle, Third-Party Payers no longer submit a Transmittal Memo with payment.

**Q: How do I submit a Credit Card payment?**
**A:** To make a credit card payment, go to your TPP Account Summary page in the Partner Portal and click the blue "Credit Card Payment" button. Choose the appropriate payment option and enter your payment details. Successful credit card payments will be reflected under "Current Funding" in your account. Review this Quick Start Guide for more information.

**Q: How do I submit or modify a Purchase Order (PO), and how do I view the status of my PO requests?**
**A:** You can manage your purchase orders directly from the TPP Account Summary page in the Partner Portal. Here's how:
- To submit a new PO: Click on "Create New Purchase Order."
- To modify an approved, unpaid PO: Select "Modify Approved Purchase Order."
- To view the status of your PO requests: Click "View Purchase Order Requests."

Detailed instructions are available in the Quick Start Guide. Please allow up to **7 business days** for processing

**Note:** As of the 2024-25 cycle, Third-Party Payers no longer submit a Transmittal Memo with payment.

**Q: How do I get an invoice?**
**A:** If you submitted a purchase order and it was approved, you can easily view and print the invoice directly from the Partner Portal. Go to your TPP Account Summary page, click on "Purchase Order Breakdown," find your PO, and click the "Invoice No." link to print or save the invoice.

If you don't have a purchase order, you can request an invoice via the Partner Portal web form. Be sure to include the name of the paying entity, mailing address, and the amount you need on the invoice. Please allow up to **7 business days** for processing.

## Designating and Managing Funds

**Q: How do I designate funds to candidates?**
**A:** Log into the Partner Portal, go to the TPP Management section, and click "Manage Designations." You can either:
1. **Use the Online Designation Form**: Select "Add New Designations," choose your funding source, enter candidate details, and submit.
2. **Upload a File**: Download the designation template, fill in candidate details, upload the file, and submit.

Detailed instructions are available in the [Quick Start Guide](). **Note:** As of the 2024-25 cycle, these are the only options for making designations. Third-Party Payers no longer submit a Transmittal Memo to designate candidate funds.

**Q: I'm trying to upload a new designation file, but it's failing. How do I fix it?**
**A:** If you're having issues uploading a designation file, try the following:

1. **Use the Current Template**: Ensure you're using the most up-to-date template and save the file as a CSV.
2. **Check for Errors**: Common issues include:
   - Fields that should be blank are not blank (remove any spaces or unintended characters).
   - Including a $ sign in the funding amount (do not include a $ sign).
   - Using the drag feature in Excel, which can cause errors in the TPP ID and assessment cycle.
   - Entering just a dollar instead of the actual funding amount (this won't cause an error but will affect the intended funding).
3. **Fix and Reupload**: Correct any errors in your original file and try uploading it again. If the file still fails to load, save it again with a new name to ensure there are no hidden issues, then upload it again.

For more common errors, refer to the [Quick Start Guide]().

**Q: Can I fund the $75 registration fee?**
**A:** Yes. If the candidate has already paid the registration fee this cycle, they will receive a refund within 6 weeks of receiving TPP funds.

**Q: Can I fund a component the candidate has already purchased?**
**A:** Yes. If the candidate has already paid for the component you will be funding this cycle, they will receive a refund within 6 weeks of receiving TPP funds.

**Q: Do I have to fund the full amount for a component?**
**A:** No. The system provides full dollar amounts for each funding option, but you don't have to enter the full amounts.

**Q: How soon do designations show on a candidate's account and how can they use them to purchase a component?**
**A:** Designations are updated in real-time and are available in the candidate's account immediately. Designated funding will be visible to candidates in the *Available Funding* section of the *Payment Portal* in their National Board account. After selecting the component they wish to purchase, the candidate will click the *Complete Payment* button to finalize the purchase. Available funding will automatically be applied during check-out. If the funding is less than the full amount of the component, the candidate will need to pay the remaining balance at the time of purchase.

**Q: I'm working on designations. How can candidates proceed with purchasing their components if the funding isn't posted to their account yet?**
**A:** 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 receive third-party funding and who do not utilize the "expecting funding" option will need to complete their purchases themselves, using the available third-party funding.

**Q: How do I change a candidate's designation (e.g., switching components or changing to a retake)?**
**A:** To change a candidate's designation, first remove the original funding, then add the new funding.

**Q: How do I get funding back from a candidate if they plan to withdraw?**
**A:** If the candidate hasn't used their funding, you can remove it now under **Manage Designations** by clicking **Remove Existing Designations.** If they have used their funding to pay for components or MOC, they need to withdraw those components before the withdrawal deadline. Once the withdrawal **and refund** is complete, you can remove those funds from their account. If you funded the $75 registration fee, please note that these fees are non-refundable and cannot be removed once used.

**Q: I missed the designation deadline. What are my options?**
**A:** If you miss the designation deadline, you will not be able to designate new funding or change existing funding designations for the current cycle. Here are your options:
* **Contact Support**: Reach out to the [Partner Portal Support team](#) as soon as possible to explain your situation. They may be able to provide guidance or assistance.
* **Plan for the Next Cycle**: Prepare to designate funds for the next cycle. Ensure you are aware of the deadlines and plan accordingly to avoid missing them in the future.
* **Review Unused Funds**: Any unused funds from the current cycle may be carried over as escrow funds for future use. Check your account details to see if you have any funds that can be utilized in the next cycle.