



**Office of
Employee Relations**

Certification and License Renewal Fee Reimbursement Pilot Program for PEF-Represented Employees

Program Guidelines
for January 1, 2024 through
December 31, 2024

Certification and License Renewal Fee Reimbursement Pilot Program

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CERTIFICATION AND LICENSE RENEWAL FEE REIMBURSEMENT PILOT PROGRAM

A. Program Description

The Certification and License Renewal Fee Reimbursement (CLRFR) Pilot Program reimburses the fees for certification and license renewals that are required for the PEF-represented employee's position. This will be based on the classification standard maintained by the Department of Civil Service for the applicant's current title or in other job descriptions or job announcements in the absence of an applicable Civil Service classification standard.

B. Funding and Oversight

Funding for the CLRFR Pilot Program is provided through Article 15 of the 2023-2026 Agreement between the State of New York and PEF. Article 15 also establishes the Professional Development Committee (PDC) that consists of two designees from the Office of Employee Relations (OER) and two from PEF. The PDC has adopted these program guidelines and monitors the administration of this program.

C. Program Highlights

- Provides *one* reimbursement per calendar year for certification and license renewals that are required for the PEF-represented employee's position that are paid for during the period of January 1, 2024, through December 31, 2024.
- Eligible employees may be reimbursed up to a maximum of is \$300 per calendar year. The date of renewal payment determines which calendar year benefits the reimbursement is applied to.
- All applications and supporting documentation must be submitted within 90 days after the date of payment. The 2024 CLRFR Program was launched on May 20, 2024. In order to allow sufficient time for submission, any applications for renewals paid for on or after January 1, 2024, and prior to May 20, 2024, may be submitted within 90 days after the launch date.
- The postmark or email date will be used to determine the timeliness of the application.
- Reimbursements under the CLRFR Program are considered excludable income and are not subject to tax.

D. Employee Eligibility

Applicants are eligible to participate in the CLRFR Program under the following conditions:

1. Current PEF-Represented Employees

At the time of payment for the certificate or license renewal, the applicant must be:

- Actively employed in a PEF-represented position
- A New York State or Roswell Park Cancer Institute employee with attendance rules coverage who is either full- or part-time (working 50 percent or more)

2. Laid Off Employees

A New York State or Roswell Park Cancer Institute employee is eligible for reimbursement if the applicant:

- Has been laid off
- Has not been rehired by New York State or Roswell Park in a PEF-represented position
- Is on the appropriate Civil Service or Roswell Park Preferred List

To be eligible for reimbursement, the renewal payment must be within 12 months of the layoff date. The applicant must provide documentation showing the layoff date and preferred list standing. The documentation must be signed by a personnel officer and sent as an attachment with other supporting documentation.

3. Less than Half-Time Employees

A New York State or Roswell Park Cancer Institute employee, represented by PEF, who works less than 50 percent, shall receive 50 percent of the benefit with proper documentation. Eligibility will be based on work status at the time of renewal payment.

E. Renewal Reimbursement Eligibility

Certificate and License Renewal Fee Reimbursement (CLRFR) Pilot Program is available for certification and license renewals that are required for the PEF-represented employee's position. This will be based on the classification standard maintained by the Department of Civil Service for the applicant's current title or in other job descriptions or job announcements in the absence of an applicable Civil Service classification standard.

The PDC maintains sole discretion for making the final determination on whether a renewal fee is eligible for reimbursement. Documentation may be requested from the applicant's supervisor to assist in determining eligibility.

F. Application Time Period and Deadline

The CLRFR Program covers eligible expenses incurred for certificate or license renewals, based on the date of renewal payment, during the period of January 1, 2024, through

December 31, 2024. The date of renewal payment determines which calendar year benefits the reimbursement is applied to. All applications must be submitted within 90 days after the date of renewal payment.

The 2024 CLRFR Program was launched on May 20, 2024. In order to allow sufficient time for submission, any applications for renewals paid for on or after January 1, 2024, and prior to May 20, 2024, may be submitted within 90 days after the launch date. The postmark or email date will be used to determine the timeliness of the application.

G. Release Time

The CLRFR Program does not entitle an employee to receive release time.

H. Expenses Covered

Eligible employees will be reimbursed for the cost of *one* certification or license renewal that is required for the PEF-represented employee's position, up to a maximum of \$300 per calendar year.

I. Expenses Not Covered

Costs and fees not reimbursed by this program include, but are not limited to:

- Fees for initial certifications, licenses, and designations whether by application or examination
- Any fees that are not part of the renewal fee
- Sales tax
- Study material (books, CDs, DVDs) and supplies
- Renewal fees for a certification or license that is not required for the employees New York State position
- Real estate licenses and certifications that are not required for the employee's position.

J. Maximum Reimbursement

An applicant can receive *one* reimbursement per calendar year, up to a maximum of \$300. The date of renewal payment will determine which calendar year the funding is from.

K. Alternative Sources of Financial Assistance

The CLRFR Program reimbursement will be secondary to any other financial assistance received. If the applicant receives assistance from any source, such as the agency, or a professional organization, the source and amount must be reported on the CLRFR application and on the paid invoice. This amount must be subtracted from the total reimbursement amount requested. An employee who fails to report the amount of assistance must repay the overpayment. These participants may be excluded from participating in future programs.

L. Taxation of Certification and License Renewal Fee Reimbursements

Reimbursements under the CLRFR Program are considered excludable income and are not subject to tax.

M. Application and Reimbursement Process

For complete guidelines and printable application forms, go to <https://oer.ny.gov/public-employees-federation-afl-cio-pef> or contact OER at (518) 474-6612.

All applications and supporting documentation must be submitted within 90 calendar days after the date of renewal payment. The 2024 CLRFR Program was launched on May 20, 2024. In order to allow sufficient time for submission, any applications for renewals paid for on or after January 1, 2024, and prior to May 20, 2024, may be submitted within 90 days after the launch date. The postmark or email date will be used to determine the timeliness of the application.

Step 1: Log on to the Reimbursement Portal

Visit the OER Reimbursement Website for a link to the online portal.

Please note: Applications can also be submitted in one of the following ways:

- *Email:* Email the application and supporting documentation by application deadline to psstraining@oer.ny.gov. All emailed documentation must be in PDF format. All other formats (JPGs or other photo formats, Word Documents, links to documentation or websites, etc. will not be accepted.)
- *U.S. Mail:* Mail application and supporting documentation, postmarked by application deadline to:

NYS Office of Employee Relations
PSTP Reimbursement Unit, 7th Floor
2 Empire State Plaza
Albany, NY 12223-1250

Step 2: Review and Update Contact Information

Review the Employee Information Section and use the 'Edit Contact Information' button to make any changes needed. Please note: The address in this section will be where all reimbursement checks are mailed. Any address changes needed after the approval of an application should be made in the portal, as well as sent to psstraining@oer.ny.gov. Any name change requests must be made through the employee's agency HR Department and cannot be updated in the portal.

Step 3: Create a New Application

Select 'Submit a new PEF EB Application'. Complete all applicable fields included on the application form. Select the 'Choose Files' button to attach all required supporting

documentation listed below to the application form. Please note: All supporting documentation must have the applicant's name printed on it by the issuing entity.

- An unaltered invoice, receipt, or itemized account summary from the provider showing the certification or license renewal cost
- Proof of payment such as a bank statement, credit card statement, cancelled check, or receipt from the issuing New York State agency indicating the source of payment.
- Documentation showing the date of the renewal payment (month, day, and year)
- Proof of renewal, such as a copy of a license or certificate or receipt from the issuing New York State agency that includes the applicant's name
- Documentation showing any financial assistance that has been received or will be received toward the cost of the renewal, if applicable

Step 4: Submit the Application

Once the application is complete, click the 'Submit' button to submit the application to OER. Once the application is received, a message will appear indicating the application was submitted successfully. It will also appear in the Application History section of the online portal.

Please note: If you are unable to obtain the required documentation within the 90-day period, you must submit your application form and contact the PSTP Reimbursement Unit prior to the deadline.

Step 5: Monitor Application Status

The following notifications will be sent via email. Accordingly, please be sure applications include a valid email address.

- *Notification of Hold:* Applicants will be notified when additional information is needed or supporting documentation has not been received. Failure to provide the required documentation will result in denial of your tuition reimbursement request.
- *Notification of Denial:* Applicants will be notified when their application has been denied and why. If the request is denied for reasons such as ineligible or incomplete application, the applicant may resubmit the claim for reimbursement with additional documentation, as long as the applicant is still within 90 days after the completion date of the requested course. Applicants will have 30 days from the date of the denial to appeal the decision for any other reason(s). The denial appeal may contain additional supporting documentation and a letter from the supervisor.
- *Notification of Approval:* Applicants will be notified when the application has been approved for payment.

Step 6: Receive Reimbursement

Once an application has been approved, reimbursement checks will be mailed from the Office of the State Comptroller to the address listed in the Reimbursement Portal. This check will resemble a paycheck or travel expense check. This is a live check and is not automatically deposited. Please allow up to four weeks for check processing and delivery.

It is the policy of the State of New York to provide for and promote equal opportunity in employment and equal access to all programs and services without discrimination on the basis of age, race, color, creed, national origin, military status, sex, sexual orientation, gender identity or expression, disability (including pregnancy-related disability or condition), predisposing genetic characteristics, marital/familial status, status as a victim of domestic violence, or prior arrest/criminal conviction record.