



**Office of
Employee Relations**

Certification and Licensure Exam Fee Reimbursement Program

for

Management/Confidential Employees

Program Guidelines

for the period

April 1, 2024 – March 31, 2025

Certification and Licensure Exam Fee Reimbursement Program

TABLE OF CONTENTS

A. Program Description.....	1
B. Program Highlights.....	1
C. Employee Eligibility	1
D. Exam Eligibility	2
E. Application Time Period and Deadline.....	3
F. Alternative Sources of Financial Assistance	3
G. Expenses Covered and Maximum Reimbursement Amount.....	4
H. Expenses Not Covered	4
I. Application Submission Process Using the Online Portal.....	4
J. Application Submission Process by Email or U.S. Mail	5
K. Taxation of Certification and Licensure Exam Fee Reimbursements.....	6

A. Program Description

The Certification and Licensure Exam Fee Reimbursement (CLEFR) Program reimburses the cost of examination fees for first-time certification and licensure to state employees designated Management/Confidential (M/C). The time period covered by this program is April 1, 2024, through March 31, 2025. During the time period, an employee can be reimbursed a maximum of \$1,100 for certification and licensure examination fees. *Please note: This program does not cover fees for Civil Service exams.*

B. Program Highlights

- Provides reimbursement for the cost of examinations for first-time certification or licensure of M/C employees for exams that occurred on or after April 1, 2024, through March 31, 2025. Applications for exams that began on or after April 1, 2024, and ended prior to September 1, 2024, must be submitted by December 1, 2024.
- Maximum reimbursement is \$1,100 for the period April 1, 2024, through March 31, 2025.
- Reimbursement requires a passing exam grade.
- All CLEFR applications must be submitted or postmarked within 90 days after the end date of the exam. Late applications will not be processed and reimbursement will be denied.
- **All reimbursements issued during the calendar year are reported to the Office of the State Comptroller (OSC) during the month of October. Once these reimbursements are reported, no further payments will be issued until after January 1 of the following calendar year.**
- **The IRS considers reimbursements under the Certification and Licensure Exam Fee Reimbursement Program taxable income. The Office of the State Comptroller will withhold estimated taxes at the end of the calendar year. This may result in substantial withholding from paychecks at the end of the year and applicants should plan accordingly.**

C. Employee Eligibility

The employee's status during the pay period in which the exam was taken will determine the applicable reimbursement rate.

1. *Current New York State or Roswell Park Cancer Institute M/C employees who are in classified service and working for the Executive Branch*

At both the start and completion date of the exam, an employee must:

- Be actively employed in a New York State or Roswell Park Cancer Institute M/C position; and
- Be a New York State or Roswell Park M/C employee with attendance rules coverage who is either full- or part-time (working 50 percent or more).

An eligibility exception may be granted to the employee, if they meet all requirements stated above, were a NYS employee represented by a different bargaining unit at the start date of the exam, and were an M/C employee at the completion date of the exam, without any breaks in service.

2. *Laid off Employees*

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

- Has been laid off in the past year; and
- Has not been rehired in a New York State or Roswell Park Cancer Institute M/C position; and
- Is on the appropriate Civil Service or Roswell Park Cancer Institute Preferred List.

3. *Half-Time Employees and Employees on Full-Time Non-Disciplinary Leave*

A New York State or Roswell Park Cancer Institute M/C employee who works less than 50 percent, and those on full-time non-disciplinary leave, are not eligible for this benefit. Eligibility will be based on work status on the start date of the exam.

For purposes of this program, employees participating in a Voluntary Reduction in Work Schedule (VRWS) agreement are deemed to be full-time employees.

D. Exam Eligibility

To be eligible for reimbursement an exam must comply with three requirements:

- The exam must be job-related or career-related or both
- The exam must result in certification or licensure for an occupation that currently exists in New York State service
- The exam must be administered by an accredited body

1. **Job-Related or Career-Related**

The exam must be job-related or career-related or both. The terms job-related and career-related are defined as follows:

a. A **job-related** exam meets one of the following criteria:

- Maintains or improves the professional certification status required for the employee's current job
- Directly relates to, or enhances, the current job assignments, duties, or responsibilities
- Meets the express requirements that are imposed by the individual's employer as a condition of continued employment

b. A **career-related** exam meets one of the following criteria:

- Increases the opportunity for advancement within a title series
- Increases the opportunity for advancement to promotional positions outside of the current title series
- Enhances an employee's ability to acquire professional certification in an entirely different occupation, and for which there is a current civil service title in the State of New York

2. Certification or Licensure

The exam must result in certification or licensure for an occupation that currently exists in New York State service. Examples would include, but are not limited to, the following:

- *Information Technology*: Exams for certification in specific software programs by manufacturers such as Microsoft, Novell, Oracle, etc.
- *Substance Abuse*: Credentialed Alcoholism and Substance Abuse Counselor written exams
- *Law*: New York State Bar exam
- *Finance*: Certified Public Accountant exam, Financial Planning exam
- *Nursing*: Certification in specific nursing disciplines such as psychiatry, forensics, etc.
- *Engineering*: Certification in specific engineering disciplines such as storm water management

3. Accreditation

The exam must be administered by an accredited body. An accredited body is defined by one or more of the following:

- Chartered, approved, or authorized by the New York State Board of Regents or an equivalent recognized body
- Licensed or registered by the New York State Education Department or an equivalent recognized accrediting body
- Licensed or registered by a department or agency of the State of New York to provide specific certification or licensing exams
- Certified computer manufacturers, such as Microsoft or Oracle, and authorized third parties who administer classes and certification exams on software, hardware, and other related information technology equipment
- Nationally recognized professional associations or their state or local chapters accredited to administer specific exams and award certification by the appropriate accrediting body

E. Application Time Period and Deadline

CLEFR provides reimbursement for the cost of examinations for first-time certification or licensure of M/C employees for exams that occurred on or after April 1, 2024, through March 31, 2025. All CLEFR applications must be submitted or postmarked within 90 days of the end date of the exam. Applications for exams that began on or after April 1, 2024, and ended prior to September 1, 2024, must be submitted by December 1, 2024. Late applications will not be processed and reimbursement will be denied.

F. Alternative Sources of Financial Assistance

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

G. Expenses Covered and Maximum Reimbursement Amount

Eligible employees will be reimbursed for the cost of first-time examinations for certification and licensure, up to a maximum of \$1,100 during the program period. The exam must be scored with a passing grade.

Where an eligible employee, by virtue of experience and training, is permitted to seek evaluation of credentials in lieu of an examination, reimbursement of fees paid will be permitted provided that such evaluation leads to de facto certification or licensure in New York State and that all other requirements of this program are met.

H. Expenses Not Covered

Costs and fees not reimbursed by the Program include, but are not limited to:

- Civil Service exam fees
- Fees for exams leading to certification in a career that does not exist in New York State service
- Fees for exams leading to college credit for life experience
- Exam fees less than \$25
- Academic and application fees
- Study material (books, CDs, DVDs, etc.) and supplies
- License and certification renewals

I. Application Submission Process Using the Online Portal

A separate application must be completed for each exam. Submitting an application using the online portal eliminates the need to complete a paper application form. All applications and supporting documentation must be submitted within 90 calendar days after the end date of the exam. Late applications will not be processed and reimbursement will be denied. Applications for exams that began on or after April 1, 2024, and ended prior to September 1, 2024, must be submitted by December 1, 2024.

Step 1: Log on to the Reimbursement Portal

Visit the online portal website at <https://educationbenefits.oer.ny.gov/>. If you don't have a Username and Password, click on the Registration button in the upper right and follow the instructions to register for a user account.

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 mctraining@oer.ny.gov. Any legal name change requests must be made through the employee's agency HR Department in order to be updated in the portal.

Step 3: Create a New Application

Select 'Submit a new MC 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.

- Documentation showing the start and end dates of the exam (month, day, and year)
- Proof of payment for exam: Original itemized invoice/receipt from the exam provider showing payment made, title of exam, date of exam administration, and cost of exam.
- Proof of a passing grade on the exam: If you have not received your exam grade, please submit your application timely, and forward your grade to us upon receipt.

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.

After receipt of the online Application Form, the M/C Reimbursement Unit will complete the application review process. Applicants will be notified by email if there are questions or issues that were identified.

J. Application Submission Process by Email or U.S. Mail

A separate application must be completed for each exam. All applications and supporting documentation must be submitted or postmarked within 90 calendar days after the end date of the exam. Late applications will not be processed and reimbursement will be denied. Applications for exams that began on or after April 1, 2024, and ended prior to September 1, 2024, must be submitted by December 1, 2024.

Step 1: Complete the M/C CLEFR Program Application Form

The employee must complete a separate M/C CLEFR Program Application Form for each exam for which reimbursement is requested. This form is available on the OER website.

Step 2: Submit the Application

Verify that the application form is completed and signed. The following supporting documentation must be submitted with the application form:

- Documentation showing the start and end dates of the exam (month, day, and year)
- Proof of payment for exam: Original itemized invoice/receipt from the exam provider showing payment made, title of exam, date of exam administration, and cost of exam.
- Proof of a passing grade on the exam: If you have not received your exam grade, please submit your application timely, and forward your grade to us upon receipt.

The employee must forward the original application and all supporting documentation in one of

the following ways:

- Email: Email the application and supporting documentation by application deadline to mctraining@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
M/C Reimbursement Unit, 7th Floor
2 Empire State Plaza
Albany, NY 12223-1250

OER cannot accept responsibility for lost or misdirected mail.

After receipt of the Application Form, the M/C Reimbursement Unit will complete the application review process. Applicants will be notified by email if there are questions or issues that were identified.

Step 4: Receive the Reimbursement

The M/C Reimbursement Unit will review all applications and all required documents. Applicants will be notified by email if there are questions or issues that were identified. The M/C Reimbursement Unit will notify the applicant regarding approval or denial status via email. Upon approval, the Office of the State Comptroller will mail a reimbursement check to the applicant's home address.

K. Taxation of Certification and Licensure Exam Fee Reimbursements

The IRS considers reimbursements under the Certification and Licensure Exam Fee Reimbursement Program to be taxable income.

All reimbursements issued during the calendar year are reported to the Office of the State Comptroller (OSC) during the month of October. Once these reimbursements are reported, no further payments will be issued until after January 1 of the following calendar year.

At the end of each calendar year, OSC will withhold estimated taxes at the end of the calendar year. Employees should consult a tax expert with questions regarding taxation of these benefits (reimbursements). This may result in substantial withholding from paychecks at the end of the year and applicants should plan accordingly. The Office of Employee Relations (OER) cannot provide any tax clarification or advice.

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.