Certification and Licensure Exam Fee Reimbursement Program

for PEF-Represented Employees

Program Guidelines

for January 1, 2026 through
December 31, 2026

Certification and Licensure Exam Fee Reimbursement Program

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CERTIFICATION AND LICENSURE EXAM FEE REIMBURSEMENT PROGRAM

A. Program Description

The Certification and Licensure Exam Fee Reimbursement (CLEFR) Program reimburses the cost of examinations for first time certification, licensure, or designation of Public Employees Federation (PEF)-represented employees. CLEFR enables employees to improve job-related skills in their profession and gain the knowledge and skills necessary for promotional opportunities and career mobility within New York State service. Examination fees to renew certifications, licenses, or designations previously obtained by an employee are not reimbursable. *This program does not cover fees for Civil Service exams. Some Civil Service exams may be reimbursed through PEF Membership Benefits*. *Check the PEF website at www.pef.org under* ***Membership Benefits*** *or call PEF at (518) 785-1900.*

B. Funding and Oversight

Funding for the CLEFR 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 reimbursement for the cost of examinations for first time certification, licensure, or designation of PEF-represented employees for exams that begin during the period of January 1, 2026, through December 31, 2026.

- Eligible employees may be reimbursed up to a maximum of is $1,100 per calendar year. The start date of the exam determines which calendar year benefits the reimbursement is applied to.

- Reimbursement requires a passing exam grade. The CLEFR Program will not cover incomplete or failed exams.

- All applications and supporting documentation for reimbursement must be submitted within 90 calendar days after the end date of the exam. The 2026 CLEFR Program was launched on June 18, 2026. In order to allow sufficient time for submission, any applications for exams that began on or after January 1, 2026, and ended prior to June 18, 2026, may be submitted within 90 calendar days after the launch date.

- The postmark, email, or portal submission date will be used to determine the timeliness of the application.

- All CLEFR reimbursement payments will be issued via NYS payroll direct deposit. Payments to Roswell Park Cancer Institute employees will be issued via check.

C. Program Highlights (Continued)

- All reimbursements issued during the calendar year are reported to the Office of the State Comptroller (OSC). 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.

- Reimbursements may be held from October through December for OSC tax reporting purposes.

D. Employee Eligibility

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

1. *Current PEF-Represented Employees*

   At both the start and end dates of the exam, 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)

   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 a PEF-represented employee at the completion date of the course, without any breaks in service.

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 exam start date 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 on the start date of the exam.

E. Exam Eligibility

CLEFR is available for job-related and career-related exams that result in first time certification, licensure, or designation at an approved institution or professional association.

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

    - *Job-related* exams must directly relate to the employee's current profession or job assignments, duties, and responsibilities.
    - *Career-related* exams must provide the employee with the knowledge, skills, or abilities to increase opportunity for advancement or career mobility within their current profession or in a career path for which there is currently a need in New York State government, such as nursing and accounting.

    Questions frequently arise regarding the eligibility of exams leading to certificates or licenses in fields such as real estate, personal tax preparation, and self-help. In keeping with the requirement that the exam be job or career-related, exams in these areas will not be eligible for reimbursement unless the applicant can demonstrate that the subject matter is directly relevant to their job or career in New York State government.

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

2. *Certification, Licensure, or Designation*

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

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

3. *Provider Eligibility*

    The certification, licensure, or designation must be awarded by an eligible provider who 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, registered, or approved by a department or agency of the State of New York to provide specific certification or licensing exams
- Certified computer or software corporations, 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
- Other providers may be approved at the sole discretion of the PDC

F. Application Time Period and Deadline

The CLEFR Program covers eligible expenses incurred for exams that begin between January 1, 2026, through December 31, 2026. The start date of the exam determines which calendar year benefits the reimbursement is applied to. All applications must be submitted within 90 calendar days after the end date of the exam.

The 2026 CLEFR Program was launched on June 18, 2026. In order to allow sufficient time for submission, any applications for exams that began on or after January 1, 2026, and ended prior to June 18, 2026, may be submitted within 90 calendar days after the launch date. The postmark, email, or portal submission date will be used to determine the timeliness of the application.

G. Release Time

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

H. Expenses Covered

Eligible employees will be reimbursed for the cost of examinations for first-time certification, licensure, and designations. Where an eligible employee, by virtue of work/professional experience and training, is permitted to seek evaluation of credentials in lieu of an examination, reimbursement of fees paid for this evaluation will be permitted provided the evaluation leads to initial certification, licensure, or designation in New York State and all other program requirements are met.

I. Expenses Not Covered

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

- Civil Service exam fees
- Fees for renewing or maintaining existing certifications, licenses, and designations, whether by application or re-examination
- Any fees that are not part of the examination fee (application, processing, academic fees, shipping fees)
- Sales tax
- Study material (books, CDs, DVDs) and supplies
- Fees for exams leading to certification in a career that doesn't exist in New York State government

- Fees for exams leading to college credit for life experience
- Real estate licenses and certifications

J. Maximum Reimbursement

Eligible employees may be reimbursed up to a maximum of $1,100 per calendar year. The start date of the exam will determine which calendar year the funding is from.

K. Alternative Sources of Financial Assistance

The CLEFR 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 CLEFR 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 Licensure Exam Fee Reimbursements

The IRS considers reimbursements under the Certification and Licensure Exam Fee Reimbursement Program to be taxable income. All tax reporting for reimbursements is based on the reimbursement check date.

All CLEFR reimbursement payments are issued via NYS payroll direct deposit. Payments to Roswell Park Cancer Institute employees will be issued via check. The Office of the State Comptroller (OSC) will withhold estimated taxes from employees.

Roswell Park Cancer Institute employees: All CLEFR reimbursements issued during the calendar year are reported to the Office of the State Comptroller (OSC) in 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. 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.

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.

- A separate application must be completed for each exam.
- Applications can only be submitted after successful completion of the exam.
- Applications submitted prior to the end date of the exam will not be accepted.

All applications and supporting documentation must be submitted within 90 calendar days after the end date of the exam. The 2026 CLEFR Program was launched on June 18, 2026. In order to allow sufficient time for submission, any applications for exams that began on or after

January 1, 2026, and ended prior to June 18, 2026, may be submitted within 90 calendar days after the launch date. The postmark, email, or portal submission 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 (https://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.

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

• *Email*: Email the application and supporting documentation by application deadline to psttraining@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. Any name change requests must be made through the employee's agency HR Department and cannot be updated in the portal.

Roswell Park Cancer Institute employees: 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 psttraining@oer.ny.gov.

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. To add multiple attachments, select and hold the 'Ctrl' key and select all attachments at one time. Please note: All supporting documentation must have the applicant's name printed on it by the issuing entity.

- Documentation such as an unaltered invoice, receipt, or itemized account summary from the provider showing the exam registration cost separate from any additional fees
- Documentation with your name printed on it by the issuing entity showing the form of payment used, such as a copy of a valid receipt from the provider, bank statement,

credit card statement, or front and back of cancelled check (If the receipt does not indicate how you paid the expense, you will need to submit additional documentation to show proof of payment)
- Documentation showing any financial assistance that has been received or will be received toward the cost of the exam indicating the name of the entity providing the assistance
- Documentation showing the date of the exam (month, day, and year)
- Documentation with your name printed on it by the provider confirming successful passing (license or certificate will not be accepted)

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. If the application is listed in the Application History section of the online portal along with a confirmation number, it has been successfully submitted to OER and is pending review. Some fields may remain blank until the information submitted is verified during the initial review.

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 Public Service Training Program (PSTP) Reimbursement Unit at psttraining@oer.ny.gov 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 calendar 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, CLEFR reimbursement will be issued via NYS payroll direct deposit.

Roswell Park Cancer Institute employees: CLEFR 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.