



Secretariat

22 May 2013

Information circular*

To: Members of the staff

From: The Secretary-General

Subject: **Education grant and special education grant for disabled children**

1. The purpose of the present circular is to inform staff members eligible to receive education grant or special education grant for disabled children under administrative instruction ST/AI/2012/01 of the procedures applicable to the submission and processing of their claims.

2. As at the date of the present circular, the monetary amounts of maximum educational expenses and maximum entitlements are set out in United Nations information circular ST/IC/2013/14 of 19 April 2013.*

Education grant advances

3. Under section 6 of administrative instruction ST/AI/2012/01, staff members who are entitled to the education grant and who are required to pay all or a portion of the school fees at the beginning of the school year may apply for an advance against their entitlement. They should do so by completing form P.45 (Request for payment of education grant and/or advance against education grant).

4. When an advance is being requested for the first time for a child, the request must be accompanied by invoices or other official documentation from the educational institution attesting to the school fees, including enrolment, tuition, full board, if applicable, and any scholarship, bursary or similar grant. The amount of the advance will be 100 per cent of the anticipated amount of the education grant on the basis of the information provided by the educational institution.

5. For a subsequent school year, the advance will normally be 100 per cent of the amount paid for the previous year. However, if lower admissible educational expenses are anticipated, the staff member should so indicate. In such a case, the amount of the advance will be 100 per cent of the grant calculated on the basis of the revised expenses. If higher admissible educational expenses are anticipated, the staff member may request an advance on the basis of the higher expenses. As in the

* The present circular will be in effect until further notice. ST/IC/2007/02 is hereby withdrawn.

* which is subject to update from time to time by the General Assembly of the United Nations in respect of United Nations staff members.



case of a first advance, official documentation will be required from the educational institution attesting to the increased expenses.

6. After the advance is requested, the staff member may request an adjustment if the anticipated admissible educational expenses on which the advance was based become higher. Should the anticipated admissible educational expenses become lower, it is incumbent on the staff member by virtue of staff regulation 1.2(b) to report that fact promptly so that the amount of the advance may be adjusted and any excess payment recovered.

7. When there is no claim for the previous school year, requests for an advance may be submitted prior to or within four months after the beginning of the school year. The request must be accompanied by invoices or other official documentation from the educational institution attesting to the school fees.

8. When there is a claim for the previous school year, the request for the advance should be presented in part IV of form P.45 together with form P.41 (Certificate of attendance and costs and receipt for payments in respect of the claim for the previous year).

9. Advances will be paid approximately one month prior to the beginning of the school year provided the relevant information is received at least two months prior to the beginning of the school year.

10. If the advance is not cleared by settlement of the relevant education grant claim for the previous year, it will be recovered from the staff member in accordance with section 6.2 of administrative instruction ST/AI/2012/01. Any advance will be considered as due from the staff member until it is either discharged by certification of the entitlement or recovered from the staff member. Recovery from staff members will take place automatically three months after the end of the academic year. For staff members who are separating from service, recovery will take place on separation.

11. No advance will be authorized for subsequent school years until previous education grant advances have been cleared by settlement of the relevant education grant claim or repayment of the advance previously authorized.

12. Advances are normally payable in United States dollars. In all cases, the advance will be recorded in United States dollars, except when educational expenses are incurred in one of the other currencies in which education grant is expressed in United Nations information circular ST/IC/2013/14*. In such cases, the advance will be recorded in the currency in which the educational expenses are incurred, using the United Nations operational rate of exchange in effect on the date of payment of the advance.

Claims for payment of the education grant

13. Claims for payment of the education grant should be submitted on form P.45. Claims should be submitted promptly upon completion of the school year or, if the staff member separates from service earlier, shortly before the date of separation from service. If the child's attendance ceases before completion of the school year, the staff member should submit the claim within one month of cessation of the child's school attendance.

14. Late claims are subject to staff rules 3.10 (ii) and will be paid only if they are submitted within one year following the date on which the staff member would have been entitled to the payment of the grant.

15. The claim must be accompanied by written evidence of the child's attendance, education costs and the specific amounts paid by the staff member. Such evidence will normally be submitted on form P.41, which should be certified by the school. The same form is required where only the flat sum for board and the fixed rate for books are claimed. In order to facilitate confirmation of data, a copy of form P.41 must be given to the educational institution.

16. When it is not possible to submit form P.41, the staff member should submit a certificate of attendance indicating the exact dates on which the school year began and ended and the dates of the child's attendance, together with receipted school bills, itemizing the various charges paid to the school and any other substantiating information requested in form P.41. These documents must be certified by a responsible official of the educational institution on its official stationery or on paper bearing its seal.

17. Neither form P.41 certified by the school nor the certificate of attendance should be changed in any way. Any revision or alteration may be cause for disciplinary action.

18. Expenditures that are not paid to the school, and cannot therefore be certified on form P.41 by the school as having been paid, may be claimed by attaching to form P.45 an explanation of the nature of the expenditure and substantiating original documentation (for example, invoices, receipts or cancelled cheques). If the certificate, other documentation and accompanying receipts are not in one of the working languages of the Authority, a translation into one of those languages must be attached.

19. If the staff member does not have custody of his or her child, the staff member will be required to submit documentary proof, in the form of invoices, receipts or cancelled cheques, that the flat sums for board and textbooks have been used for the purposes intended.

Admissible expenses

20. Admissible expenses are determined on the basis of the criteria contained in section 3 of administrative instruction ST/AI/2012/01. Expenses for full-time school attendance admissible under section 3.1 of the instruction are those that are paid directly to the school or are certified by the school as being necessary for school attendance.

21. Boarding expenses are admissible under section 3.2 of administrative instruction ST/AI/2012/01.

22. Expenses for textbooks are admissible, and will be paid in accordance with the provisions of sections 3.3 and 4.3 of administrative instruction ST/AI/2012/01. To that effect, staff members are required to obtain from the educational institution a certification on form P.41 that the textbooks have not been provided free of charge.

23. Admissible expenses for textbooks shall be reimbursed up to a maximum of 75 per cent of the following fixed rates:

- (a) \$210 for a child at the primary level;
- (b) \$420 for a child at the secondary level;
- (c) \$840 for a child at the post-secondary level.

No additional supporting evidence is required if the staff member claims the reimbursement for textbooks at or below the fixed rate.

24. If the amount claimed exceeds the applicable fixed amount, and the textbooks were bought at or through the educational institution, the staff member will need to obtain from that institution a certification and receipt on form P.41 C (Certificate of prescribed textbooks and receipt for amount paid). A copy of the form should be retained by the educational institution.

25. When it is not possible to submit form P.41, textbook expenses may be claimed upon certification by the staff member in form P.45 that the textbooks were not provided free of charge. In those cases, the staff member is required to retain a list of prescribed textbooks and receipts documenting their purchase, in accordance with section 9.2 of administrative instruction ST/AI/2012/01, so that they may be produced for review, audit or investigation.

26. Expenses for private tuition in the mother tongue are admissible when all the conditions of section 3.4 of administrative instruction ST/AI/2012/01 are met.

27. A request for reimbursement for tuition in the mother tongue must be accompanied by:

- (a) A certificate for tuition in the mother tongue (form P.41 A (Certificate of tuition in the mother tongue)), certified by the educational institution or tutor. A certified copy of the form should be retained by the educational institution or tutor;

- (b) Original cancelled cheques or copies of original cheques accompanied by bank statements to verify the payments made to the tutor or to the educational institution. It should be noted that receipts or other written confirmation of cash payments are not acceptable as proof of payment;

- (c) Certificate of full-time school attendance (form P.41).

Non-admissible expenses

28. Section 3.5 of administrative instruction ST/AI/2012/01 lists expenses that are normally non-admissible, generally because they are not considered to be expenses required to follow the regular school programme or curriculum on a full-time basis. Section 3.5 also provides for exceptions allowing certain expenses normally considered to be non-admissible to become admissible when a number of conditions are met. For instance, expenses for summer courses are normally non-admissible, but they may exceptionally be considered admissible when the summer courses are a prerequisite for further attendance during the regular school year or are required for the school's regular diploma.

29. Among the expenses that are not admissible are school supplies, equipment or uniforms, insurance, medical examinations, donations and contributions or similar charges. Similarly, courses or activities that are not covered by the regular tuition fee and are not required of all students following a given programme or curriculum are considered to be non-admissible.

Scholarship, bursary or similar grant

30. Staff members are required to disclose all scholarships, bursaries or similar grants in a statement attached to form P.45. Financial assistance in the form of a scholarship, bursary or similar grant should be certified on form P.41 by the educational institution.

31. As provided in section 3.6 of administrative instruction ST/AI/2012/01, the amount of the scholarship, bursary or similar grant is initially applied towards the non-admissible expenses reflected on form P.41.

32. If the amount of the scholarship, bursary or similar grant does not exceed the non-admissible educational expenses, the education grant is calculated on the basis of the total admissible expenses.

33. If the amount of the scholarship, bursary or similar grant exceeds the non-admissible expenses, the excess amount is deducted from the admissible expenses. The education grant is then calculated on the basis of the remaining admissible expenses.

34. Financial assistance in the form of loans, which have to be repaid to a governmental institution, an educational institution, a bank or any other private sources, need not be reported and are not deducted from either admissible or non-admissible expenses.

Death of a staff member after the beginning of the school year

35. Sections 5.4 and 8.1(f) of ST/AI/2012/01 provide that no prorating of the amount of the grant will be required when the staff member dies while in service after the beginning of the school year and the entitlement to education grant travel will continue until the end of the school year and may be authorized for travel between the educational institution and Kingston or another location, subject to the maximum expenses allowed under section 8.1(d) of administrative instruction ST/AI/2012/01.

36. As a result:

(a) There will be no prorating or disqualification in respect of any element of the education grant to which the staff member would have been entitled had he or she lived to the end of the school year, including boarding expenses or a flat sum for board and education grant travel;

(b) When processing the separation personnel action form or form P.35, as applicable, there should be no automatic recovery which would have resulted from prorating the amount of the grant based on a period of service shorter than the normal school year;

(c) All relevant forms may be completed by the surviving spouse or the legal representative of the child for whom the education grant or education grant travel is paid, or by the child if 18 years of age or older.

Travel arrangements and claims

37. Education grant travel should be requested on form P.66 (Request for education grant travel). The conditions for education grant travel are set out in section 8 of administrative instruction ST/AI/2012/01. When the request is

approved, a travel authorization (PT.8) will be issued, specifying the school year to which the travel is related and the mode, route and dates of travel.

38. Staff members are not allowed to make a direct purchase of the travel tickets without specific prior authorization.

39. If it is not possible for the child to travel to the duty station on education grant travel, either the staff member or his or her spouse may undertake return travel at the expense of the Authority between Kingston and the place of study of one child, subject to the conditions set out in section 8.5 of administrative instruction ST/AI/2012/01. In the case of a staff member with two or more children entitled to education grant travel, both the staff member and his or her spouse may undertake return travel at the expense of the authority, subject to the same conditions. Pursuant to section 12 of ST/AI/2012/03 regarding official travel, for purposes of education grant travel by air, staff members may opt for a lump-sum payment. Staff members opting for the lump-sum payment should follow the procedures for the exercise of the lump-sum option for travel by air set out in paragraphs 7 to 10 of information circular ST/IC/2013/06.

40. Within two weeks of completion of the child's education grant travel, the staff member must submit a travel claim on form F.10, regardless of whether any claim for reimbursement of the education grant has been made. Submission of form F.10 is required to verify that travel has been undertaken as authorized, as well as for the purpose of certification of the travel expenses for which reimbursement is claimed.

41. A Form F.10 should be accompanied by the original travel authorization form (PT.8), ticket stubs and receipts for all expenses for which reimbursement is claimed.

42. If a child went on education grant travel in a previous school year, no new education grant travel will be authorized before the claim for the prior travel has been approved.

Claims for payment of the special education grant

43. Claims for payment of the special education grant should be submitted on form P.45.

44. When the child is not in school attendance, such claims should be submitted annually within one month of the end of the standard school year at headquarters. When the child is in school attendance, claims should be submitted in accordance with paragraph 14 above. If the staff member separates from service earlier, a claim should be submitted shortly before separation from service.

45. A medical certificate attesting to the disability that gives rise to the claim for payment of the special education grant must accompany the claim. The certifying officer should submit the medical certificate to a medical officer designated by the Secretary-General who will determine, based on prevailing medical standards, the acceptability of the certificate for the purpose of the special education grant and the date on which the entitlement should be reviewed on medical grounds.

46. The staff member is also required to provide evidence that he or she has exhausted all other sources of benefits that may be available for the education and training of the child, including those that may be obtained from State and local

Governments and from the Authority's contributory medical insurance plans. The amount of the expenses used as the basis for the calculation of the special education grant is reduced by the amount of any benefits to which the staff member is entitled.

47. The provisions of the present circular relating to education grant advances, claims for payment of the education grant and travel arrangements should be followed when making those claims under the special education grant entitlement.

(Signed) Nii A. **Odunton**
Secretary-General
