



## Secretariat

10 March 2020

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### Information circular\*

To: Members of the staff

From: The Secretary-General

Subject: **Education grant and related benefits and special education grant and related benefit for children with a disability**

#### I. General provisions

1. The purpose of the present circular is to inform staff members eligible to receive the education grant and related benefits under administrative instruction [ISBA/ST/AI/2020/2](#) or the special education grant and related benefit for children with a disability under administrative instruction [ISBA/ST/AI/2020/3](#) (hereafter referred to as “the grant and related benefits”) of the procedures applicable to the submission and processing of their claims for payment and/or requests for advances. Staff members are strongly encouraged to review the policy provisions contained in staff regulation 3.4, staff rule 3.9 and the above-mentioned administrative instructions before submitting a claim for payment or requesting an advance.

2. The forms required to submit a claim and/or a request for advance, which may be updated from time to time, are listed in annex I to the present circular and accessible to all staff on the dedicated information platform. The maximum amounts of admissible educational expenses and maximum reimbursements are shown in annex II to the present circular, together with an example of how the grant is computed under the global sliding scale. The overall maximum amounts of the special education grant and maximum entitlements for reimbursement of equipment and textbooks are shown in annex III to the present circular. The maximum amounts and entitlements of the grant and related benefits may be updated from time to time under the United Nations common system of salaries and allowances.

#### II. Requests for advances for the grant and related benefits

3. Staff members who are entitled to the grant and related benefits and who are required to pay all or a portion of the education 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/EG (Education grant and related benefits: claim for payment and/or request for advance) or P.45/SEG (Special education grant and related benefit: claim for payment and/or request for advance).

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

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\* The present circular will be in effect until further notice. [ISBA/ST/IC/2013/07](#) is hereby withdrawn.



educational institution attesting to the fees, including enrolment, tuition, boarding assistance (where applicable) and any scholarship, bursary or similar grant.

#### **Amount of the advance**

5. The amount of the advance will be 100 per cent of the anticipated amount of the grant and related benefits (i.e. reimbursement of the capital assessment fee and boarding assistance (where applicable)) on the basis of the information and documentation provided by the educational institution.

6. For a subsequent school year, the advance will normally be 100 per cent of the amount paid for the previous year. In addition, an advance against boarding assistance and the reimbursement of the capital assessment fee may be paid based on submitted documentation. However, if lower admissible educational expenses are anticipated, the staff member should indicate the lower amount in the request for advance. 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 and the related benefits, where applicable. If higher admissible educational expenses are anticipated, the staff member may request an advance on the basis of the higher expenses. As in the case of a first advance, official documentation will be required from the educational institution attesting to the increased expenses.

#### **Adjustments after the advance has been issued**

7. If the anticipated admissible educational expenses on which the advance was based become higher after the advance is requested, an adjustment may be requested as soon as the staff member is informed of the higher charges. Should the anticipated admissible educational expenses become lower, the staff member must report that fact promptly so that the amount of the advance may be adjusted and any excess payment recovered.

#### **Timeline for submission of requests for advances**

8. 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. A staff member who becomes eligible for the grant after the fourth month following the beginning of the school year may request an advance until three months before the end of the school year. The request must be accompanied by invoices or other official documentation from the educational institution attesting to the school fees.

9. 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/EG or P.45/SEG, which should be submitted together with form P.41 (Certificate of attendance and costs and receipt for payments) in respect of the claim for the previous year.

10. 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.

#### **Settlement of claims and recovery of advances**

11. If the advance is not cleared by settlement of the relevant grant and related benefits claim for the previous year, it will be recovered from the staff member's salary in accordance with section 7.2 of administrative instruction [ISBA/ST/AI/2020/2](#) and/or section 9.2 of [ISBA/ST/AI/2020/3](#), respectively. Any advance will be considered to be due from the staff member until it is either discharged by certification of the entitlement or recovered from the staff member.

Recovery will take place automatically three months after the end of the school year or before separation from service, whichever comes first.

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

#### **Currency of the advance**

13. Advances are normally payable in United States dollars. In all cases, the advance will be recorded in United States dollars.

### **III. Claims for payment of the grant and related benefits**

#### **Timeline for submission of a claim for payment**

14. Claims for payment of the grant and related benefits should be submitted on form P.45/EG or P.45/SEG. Claims should be submitted, at the latest, within two months upon completion of the school year, within one month upon cessation of the child's full-time attendance or shortly before the staff member's date of separation from service, whichever comes first.

15. Late claims are subject to staff rule 3.14 (b) 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.

#### **Supporting documentation**

16. 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 boarding assistance is claimed. In order to facilitate confirmation of data, form P.41 must be given to the educational institution. Staff members should request the school to retain a copy of the form for a period of five years from the date of submission of the claim, for audit and monitoring purposes.

17. When it is not possible to submit form P.41, the staff member should submit a certificate of attendance (form P.41/B) indicating the exact dates on which the school year began and ended and the dates of the child's attendance, together with school bills itemizing the various charges paid to the school, documentary proof of payment, including invoices, receipts or cancelled cheques, 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.

18. Submission of incorrect information, including any revision or alteration of the certified form P.41 or the certificate of attendance, may be cause for administrative and/or disciplinary action.

19. Expenditures that are not paid to the educational institution and cannot therefore be certified on form P.41 by the institution as having been paid may be claimed by attaching to form P.45/EG or P.45/SEG 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.

20. Staff members who do not have custody of their child will be required to submit documentary proof, in the form of invoices, receipts or cancelled cheques, that the boarding assistance has been used for the purposes intended.

#### **Admissible expenses**

21. Admissible expenses are determined on the basis of the criteria contained in section 3.1 of administrative instruction [ISBA/ST/AI/2020/2](#) and section 5.1 of administrative instruction [ISBA/ST/AI/2020/3](#). Expenses for full-time school attendance admissible under those sections are those that are paid directly to the school or are certified by the school as being necessary for school attendance, or, where applicable, by a certified professional providing the required special teaching and the special training.

#### *Expenses for private tuition in the mother tongue*

22. In addition to the expenses mentioned in paragraph 21 above, expenses for private tuition in the mother tongue are admissible when all the conditions of section 3.1 (c) of administrative instruction [ISBA/ST/AI/2020/2](#) are met.

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

(a) A certificate of 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 for a period of five years from the date of submission of the claim for payment for audit and monitoring purposes;

(b) Evidence to sufficiently document payments actually made, such as 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, money order receipts or bank transfer receipts accompanied by an explanatory affidavit. It should be noted that receipts or other written confirmation of cash payments are not acceptable as proof of payment;

(c) A certificate of full-time school attendance (form P.41, Certificate of attendance and costs and receipt for payments, or form P.41/B, Certificate of school attendance);

(d) In the case of private tuition, evidence that the tutor is certified in the language of instruction.

#### **Boarding assistance**

24. A lump sum of \$5,000 per child per school year is provided to eligible staff members who meet the conditions set out under sections 2.5 and 2.6 of administrative instruction [ISBA/ST/AI/2020/2](#) and section 6.1 of administrative instruction [ISBA/ST/AI/2020/3](#). Eligible staff members who meet the conditions and wish to claim the lump sum for boarding assistance must indicate so on form P.45/EG or P.45/SEG.

#### **IV. Scholarships, bursaries or similar grants**

25. Staff members are required to disclose all scholarships, bursaries or similar grants on form P.45/EG or P.45/SEG. Financial assistance in the form of a scholarship, bursary or similar grant received directly or through the educational institution should be certified on form P.41.

26. As provided in section 3.5 of administrative instruction [ISBA/ST/AI/2020/2](#) and section 6.6 of administrative instruction [ISBA/ST/AI/2020/3](#), the amount of the scholarship, bursary or similar grant is initially applied towards the non-admissible expenses reflected on form P.41.

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

28. 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 grant is then calculated on the basis of the remaining admissible expenses.

29. Financial assistance in the form of loans that 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.

#### **V. Death of a staff member after the beginning of the school year**

30. When a staff member dies while in service at or after the beginning of the school year, the amount of the grant and the related benefits for that school year will not be prorated. The entitlement to education grant travel, if any, 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 9.3 of administrative instruction [ISBA/ST/AI/2020/2](#) and section 11.1 of administrative instruction [ISBA/ST/AI/2020/3](#).

31. As a result:

(a) There will be no prorating or disqualification in respect of any element of the grant and related benefits to which the staff member would have been entitled had the staff member lived to the end of the school year, including boarding assistance and education grant travel where applicable;

(b) When processing the separation personnel action form or form P.35 (Personnel payroll clearance action), as applicable, there should be no automatic recovery, which would have resulted from prorating the amount of the grant and related benefits 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 grant and related benefits or education grant travel is paid, or by the child if the child is 18 years of age or older.

#### **VI. Travel arrangements and claims**

32. Only staff members who are eligible to receive boarding assistance may request education grant travel. The conditions for education grant travel are set out in section 9 of administrative instruction [ISBA/ST/AI/2020/2](#) and section 11 of administrative instruction [ISBA/ST/AI/2020/3](#). The instructions set out in paragraphs 33 to 38 below should be followed when making a claim under the special education grant and related benefit entitlement.

33. Education grant travel should be requested on form P.66 (Request for education grant travel). When the request is approved, a travel authorization will be issued, specifying the school year to which the travel is related and the mode, route and dates of travel.

34. Staff members should not make a direct purchase of the travel tickets without specific prior authorization.

35. If it is not possible for the child to travel to the duty station on education grant travel, either the staff member or the staff member's spouse may undertake return travel at the expense of the Authority between the duty station and the place of study of one child, subject to the conditions set out in sections 9.5 and 9.6 of administrative instruction [ISBA/ST/AI/2020/2](#). In the case of a staff member with two or more children entitled to education grant travel, both the staff member and the staff member's spouse may undertake return travel at the expense of the Authority, subject to the same conditions. As set out in the administrative instruction 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 the associated information circular.

36. 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.

37. 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.

38. If a child exercised 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.

## **VII. Additional provisions for claims for payment of the special education grant and the related benefit**

### **Timeline for submission of a claim for payment**

#### *First-time claim*

39. In order for a child to be recognized as having a disability, the staff member must provide a medical report and relevant supporting documents attesting to the disability that gives rise to the claim for payment of the special education grant and the related benefit. Staff members should contact their human resources officer to receive advice on the documents to be submitted and the procedure for submission to the United Nations medical services for determination of the acceptability of the request and the date on which the entitlement should be reviewed on medical grounds.

#### *Subsequent claims*

40. Staff members should submit claims for payment of the special education grant and the related benefit on form P.45/SEG.

41. When the child is in school attendance, the claim should be submitted in accordance with paragraph 14 above.

42. 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 the staff member's duty station or shortly before the staff member's date of separation from service. If the staff member separates from service earlier, a claim should be submitted shortly before the date of separation.

43. Staff members are also required to certify on form P.45/SEG that they have exhausted all other sources of benefits that may be available to them for the education and training of the child, including those that may be obtained from States 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.

**Special benefits**

44. Staff members are required to disclose on form P.45/SEG all special benefits that may be available to them for the education and training of the child, including those that may be provided by States and local governments and medical insurance plans. As provided in section 6.5 of administrative instruction [ISBA/ST/AI/2020/3](#), the amount of admissible educational expenses is reduced by the amount of any special benefits.

*(Signed)* Michael **Lodge**  
Secretary-General

## Annex I

### **Forms to be used in the preparation of claims for the education grant and the special education grant**

The following forms required to submit a claim related to the education grant and the special education grant are listed in the present annex for ease of reference of staff members:

Form P.41	Certificate of attendance and costs and receipt for payments
Form P.41/A	Certificate of tuition in the mother tongue
Form P.41/B	Certificate of school attendance (to be used only when it is not possible to submit form P.41 or by national staff whose children are between 18 and 21 years of age as proof of full-time student status in order to continue to receive dependency allowance)
Form P.41/C	Certificate of prescribed textbooks and receipt for amount paid
Form P.41/D	Certificate of attendance in summer courses
Form P.45/EG	Education grant and related benefits: claim for payment and/or request for advance
Form P.45/SEG	Special education grant and related benefit: claim for payment and/or request for advance
Form P.66	Request for education grant travel

## Annex II

## Education grant entitlements – global sliding scale

(United States dollars)

<i>Amount of admissible expenses – claim amount bracket</i>	<i>Reimbursement rate (percentage)</i>	<i>Maximum reimbursement amount</i>
0–11 600	86	9 976
11 601–17 400	81	4 698
17 401–23 200	76	4 408
23 201–29 000	71	4 118
29 001–34 800	66	3 828
34 801–40 600	61	3 538
40 601 and above	0	0
<b>Maximum total</b>		<b>30 566</b>

*Example:*

If a staff member claims \$35,000 of admissible expenses, the grant will be computed as follows:

The first \$11,600 will be reimbursed at 86 per cent	9 976
From \$11,601 to \$17,400, the reimbursement rate will be 81 per cent	4 698
From \$17,401 to \$23,200, the reimbursement rate will be 76 per cent	4 408
From \$23,201 to \$29,000, the reimbursement rate will be 71 per cent	4 118
From \$29,001 to \$34,800, the reimbursement rate will be 66 per cent	3 828
From \$34,800 to \$35,000, the reimbursement rate will be 61 per cent	121
<b>Total</b>	<b>27 149</b>

For a claim of \$35,000, the staff member would receive an education grant of \$27,150.

## Annex III

### **Overall maximum amounts of the special education grant and maximum entitlements for reimbursement of equipment and textbooks**

#### **Maximum amounts of the special education grant**

1. The maximum amounts of the special education grant are as follows:
  - (a) \$40,600 without boarding expenses;
  - (b) \$45,600 with boarding expenses.

#### **Maximum entitlement for reimbursement of equipment**

2. The maximum entitlement for reimbursement of equipment for educational purposes is \$3,333. That amount is part of the applicable maximum special education grant amount mentioned in paragraph 1 above.

#### **Maximum entitlement for reimbursement of textbooks**

3. If the child attends an institution that provides the necessary special arrangements, the expenses for textbooks are admissible and will be paid in accordance with the provisions of section 5.1 of administrative instruction [ISBA/ST/AI/2020/3](#). In this case, the staff member is required to obtain from the educational institution a certification on form P.41 that the textbooks have not been provided free of charge.
4. Admissible expenses for textbooks shall be reimbursed at 100 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.
5. 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/SEG that the textbooks were not provided free of charge. If the actual amount spent on textbooks is greater than the fixed amount provided in paragraph 4 above, form P.41/C, completed by the educational institution, will be required for reimbursement of expenses for textbooks. In those cases, staff members are required to retain a list of prescribed textbooks and receipts documenting their purchase, in accordance with section 12.2 of administrative instruction [ISBA/ST/AI/2020/3](#), so that they may be produced for review, audit or investigation.
6. If the child attends a regular institution that does not provide the necessary special arrangements, the textbook expenses claimed under special teaching or training may be claimed upon certification by the staff member in form P.45/SEG that the textbooks were not provided free of charge. The actual amount spent on textbooks, certified on form P.41/C by the provider (e.g., the educational institution or tutor), is required for reimbursement of textbook expenses at 100 per cent under the special education grant scheme. In those cases, staff members are required to retain a list of prescribed textbooks and receipts documenting their purchases, in accordance with section 12.2 of administrative instruction [ISBA/ST/AI/2020/3](#), so that they may be produced for review, audit or investigation.