

Policy Guideline

Education Grant and Related Benefits¹

OHR/PG/2022/1 – 1 June 2022

I. General Provisions

1. The policy provisions governing the education grant and related benefits are contained in staff regulation 3.2, staff rule 3.9, appendix B to the Staff Rules and administrative instruction ST/AI/2018/1/Rev.1, ST/AI/2018/1/Rev.1/Amend.1 and ST/AI/2018/1/Rev.2. Staff members are strongly encouraged to review the above-mentioned policy frameworks before submitting a claim for payment or requesting an advance against the education grant and related benefits entitlement.
2. The purpose of this policy guideline is to inform staff members of the procedures applicable to the submission and processing of their claims for payment and/or requests for advance.
3. The forms required to submit a claim and/or a request for advance are listed in annex I to this guideline and are available online in the United Nations Policy Portal. The maximum amounts of admissible educational expenses and maximum reimbursements currently in effect are contained in ST/IC/2022/8.

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

4. Staff members who are entitled to the education grant and related benefits and who are required to pay all or a portion of the education fees at the beginning of the academic 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), which can be found in the United Nations Policy Portal.

Amount of the first-time advance and subsequent advances

5. When an advance is requested for the first time, the request must be accompanied by invoices or other official documentation from the educational institution attesting to the fees, including enrolment, tuition and any scholarship, bursary or similar grant. Based on the information provided by the educational institution, the amount of the advance will be 100 per cent of the anticipated amount of the education grant and the related benefits (i.e., reimbursement of the capital assessment fee and boarding assistance, where applicable).
6. For a subsequent school year, the advance will normally be 100 per cent of the anticipated amount of the education grant expected for the year. In addition, an advance against boarding assistance and the reimbursement of the capital assessment fee may be paid based on submitted documentation. Official documentation will be required from the educational institution attesting to the expenses for education grant and related benefits claimed.

Adjustments after the advance has been issued

¹ Approved by DMSPC/OHR on 1 June 2022

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 academic year under the education grant or the special education grant scheme, a staff member may request an advance prior to or within four months after the beginning of the academic year. A staff member who becomes eligible for the education grant after the fourth month following the beginning of the school year may request an advance until three months before the end of the academic year. The request must be accompanied by invoices or other official documentation from the educational institution attesting to the fees.

Submission of claims for advance

9. When there is a claim to settle the previous academic year, the request for the advance should be presented in part IV of form P.45/EG, which should be submitted together with form P.41 (Certificate of attendance and costs and receipt for payments) in respect of the claim to settle the previous year (part III of form P.45/EG) and documentary evidence of the anticipated charges for the year.

10. When there is no claim for the previous academic year, only part IV of form P.45/EG needs to be completed together with documentary evidence of the anticipated charges for the year.

Settlement of claims and recovery of advances

11. If the advance is not cleared by settlement of the relevant education 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 ST/AI/2018/1/Rev.1. Recovery from staff members shall take place after the third month following the end of the academic year or upon separation from service, whichever comes first.

12. In line with section 7.3 of administrative instruction ST/AI/2018/1/Rev.1, no advances will be authorized for subsequent academic years until previous education grant advances granted under the education grant scheme or under the special education grant scheme have been cleared by settlement of the relevant claim or the recovery of the advance previously authorized has been made.

Currency of the advances

13. Advances are normally payable in United States dollars at all duty stations except Geneva. For staff members whose duty station is Geneva, the advances will be payable in Swiss francs, as is the practice for emoluments. In all cases, the advance will be recorded in United States dollars.

III. Claims for payment of the education grant and related benefits

Timeline for submission of a claim for payment

14. Staff members should submit their claims for payment of the education grant and related benefits on form P.45/EG at the latest within two months upon completion of the academic 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.

Supporting documentation

15. Staff members must provide, along with their claim, written evidence of the child's attendance, education costs and the specific amounts they paid. Such evidence will be submitted on form P.41, which should be certified by the school. Staff members are required to retain a copy of form P.41 for a period of five years from the date of submission of the claim for audit and monitoring purposes.

16. When it is not possible to submit form P.41, staff members should submit a certificate of school 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 receipts or cancelled cheques and any other substantiating information requested on form P.41. The documents should be certified by a responsible official of the educational institution on its official stationery or on paper bearing its seal.

17. Submission of incorrect information, including any revision or alteration of the certified form P.41 or the certificate of attendance may result in administrative and/or disciplinary actions.

18. 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 an explanation of the nature of the expenditure and substantiating original documentation (for example, receipts or cancelled cheques). If the certificate, other documentation and accompanying receipts are not in one of the working languages of the United Nations, a translation into one of those languages must be attached.

Admissible expenses

19. Expenses for full-time school attendance admissible are contained in section 3.1 of administrative instruction ST/AI/2018/1/Rev.1 and amended by ST/AI/2018/1/Rev.1Amend.1. A request for reimbursement for admissible expenses must be accompanied by:

Document	School tuition and enrolment related fees	Tuition in mother tongue	Summer courses	Private tuition	Distance learning
P.41 form (Certificate of full-time attendance and costs) certified by the educational institution *	☑				
P.41/B, Certificate of school attendance), certified by the educational institution or tutor**		☑			
P.41/A, Certificate of tuition in the mother tongue), certified by the educational institution or tutor*		☑			
Proof of payment ***		☑	☑	☑	☑

Evidence that the tutor is certified in the language of instruction/qualified in the subject.		☑		☑	
Evidence that the private tutor is not a member of the staff member's family		☑		☑	
Confirmation that the courses meet the conditions of 3.1 (d)					☑
Confirmation that the private tuition meets the conditions of 3.1 (e)				☑	
Confirmation that the courses meet the conditions of 3.1 (g)			☑		

*The staff member is required to retain the certificate for a period of five years from the date of submission of the claim for payment for audit and monitoring purposes.

** Form P.41/B is only required for mother tongue tuition if no claim is made for reimbursement of full-time attendance costs (P.41 form is used).

*** Evidence to sufficiently document payments actually made, such as original cancelled cheques, 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 are acceptable forms of proof of payment. It should be noted that receipts or other written confirmation of cash payments are not acceptable as proof of payment.

Boarding assistance

20. A lump sum per child per academic year, is provided to eligible staff members who meet the conditions set out in sections 2.5 to 2.8 of ST/AI/2018/1/Rev.1. Eligible staff members who meet the conditions and wish to claim the lump sum for boarding assistance indicate so on form P.45/EG.

Attendance at an educational institution at the duty station

21. Where the educational institution is located beyond commuting distance from the area where the staff member is serving and, in the opinion of the Secretary-General, no school in that area would be suitable for the child, the lump sum for boarding is payable to eligible staff members provided that all other eligibility conditions are met. The decision to exceptionally allow payment of boarding assistance for attendance at a school beyond commuting distance from the area where the staff member is serving and where no school in that area would be suitable for the child shall be made by the Office of Human Resources.

IV. Scholarships, bursaries or similar grants

22. Staff members are required to disclose all scholarships, bursaries or similar grants on form P.45/EG. Financial assistance in the form of a scholarship, bursary or similar grant received directly from or through the educational institution should be disclosed on form P.45/EG if not certified by the school on form P.41.

23. As provided in section 3.5 of administrative instruction ST/AI/2018/1/Rev.1, the amount of the scholarship, bursary or similar grant is initially applied towards the non-admissible expenses reflected on form P.41 or form P.45/EG.

24. 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.

25. 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. Any remaining balance is deducted from the education grant-related benefits.

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

26. Staff rule 3.9 (f) and sections 6.4 and 9.2 of administrative instruction ST/AI/2018/1/Rev.1 provide that when a staff member dies while in service at or after the beginning of the academic year, the amount of the grant and related benefits for that academic year will not be prorated and 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 the duty station or another location, subject to the maximum expenses allowed under section 9.3 of the instruction.

27. As a result:

- There will be no prorating or disqualification in respect of any element of the education grant and related benefits to which the staff member would have been entitled had he or she lived to the end of the academic year, including boarding assistance and education grant travel where applicable;
- 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 academic year;
- All relevant forms may be completed by the surviving spouse or the legal representative of the child for whom the education grant and related benefits or education grant travel is paid, or by the child if he or she is 18 years of age or older.

VI. Travel arrangements and claims

28. 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 ST/AI/2018/1/Rev.1.

29. Education grant travel should be requested in Umoja. When the request is approved, a travel authorization will be issued specifying the academic year to which the travel is related and the mode, route and dates of travel.

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

31. If it is not possible for the child to travel to the duty station on education grant travel, the staff member or his or her spouse may undertake return travel at the expense of the Organization between the duty station and the place of study of one child, subject to the conditions set out in section 9.5 and 9.6 of administrative instruction ST/AI/2018/1/Rev.1. Except for staff members assigned to non-family duty stations, 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 Organization, subject to the same conditions. Pursuant to section 12 of administrative instruction ST/AI/2013/3, or as amended, regarding official travel, for the 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 8 to 14 of information circular ST/IC/2019/16, or as amended.

32. Staff members must submit an expense report in Umoja within two weeks of completion of the education grant travel.

Annex I

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

The following forms are required to submit a claim related to the education grant and are available online in the United Nations Policy Portal:

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)
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