

Policy Guideline

Special Education Grant and Related Benefits for Children with a Disability¹

OHR/PG/2022/2 – 1 June 2022

I. General Provisions

1. The policy provisions governing the special education grant and the related benefit are contained in staff regulation 3.2 (d), staff rule 3.9 (i), appendix B to the Staff Rules and administrative instruction ST/AI/2018/2 and ST/AI/2018/2/Amend.1. Staff members are strongly encouraged to review the above-mentioned policy framework before submitting a claim for payment or requesting an advance against the special education grant and related benefit 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 advances.
3. The forms required to submit a claim 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 admissible expenses for special education grant currently in effect are contained in ST/IC/2022/8.

II. Certification of disability

4. 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 partners to receive advice on the documents to be submitted and the procedure for submission to the Medical Director or designated medical officer, who will review the request and determine the acceptability of the request on medical grounds as well as the proposed date of the next review, if applicable.

III. Requests for advances for the special education grant and the related benefits

5. Staff members who are entitled to the special education grant and the related benefit 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/SEG (Special education grant and related benefit: claim for payment and/or request for advance) available on the United Nations Policy Portal. Requests for advances for the special education grant and the related benefit 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 or special benefit.

¹ Approved by DMSPC/OHR on 1 June 2022

Amount of the advance

6. The amount of the advance will be 100 per cent of the anticipated amount of the special education grant and the related benefit (i.e., reimbursement of the capital assessment fee), based on the information and documentation provided.

Adjustments after the advance has been issued

7. If the anticipated 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 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 school year. A staff member who becomes eligible for the special 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 school 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/SEG, 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/SEG) 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/SEG 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 special education grant and related benefit claim for the previous year, it will be recovered from the staff member's salary in accordance with section 9.2 of administrative instruction ST/AI/2018/2. 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 accordance with section 9.3 of administrative instruction ST/AI/2018/2, no advances will be authorized for subsequent academic 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 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, 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.

IV. Claims for payment of the special education grant and the related benefit

Timeline for submission of a claim for payment

14. Staff members should submit their claims for payment of the special education grant and the related benefit on form P.45/SEG.
15. When the child is in school attendance, the claim should be submitted, 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 date of separation from service, whichever is earlier.
16. When the child is not in school attendance, such claims including any claims for special teaching or trainings taken during or after the academic year, if applicable, should be submitted annually within one month prior to the start of the subsequent academic year in the staff member's duty station or shortly before the staff member's date of separation from service.
17. The staff member is also required to certify on form P.45-SEG 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 United Nations 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.
18. Staff members must provide, along with their claim, written evidence of the child's attendance, education costs and the proof of payments made. Such evidence will be submitted on form P.41, which should be certified by the school. Staff members are requested 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.
19. When it is not possible to submit form P.41, the staff member 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, 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, and any other substantiating information requested in form P.41. These documents should be certified by a responsible official of the educational institution on its official stationery or on paper bearing its seal. It should be noted that written confirmation of cash payments are not acceptable as proof of payment.
20. Submission of incorrect information, including any revision or alteration of the certified P.41 form or the certificate of attendance, may result in for administrative and/or disciplinary action.

21. 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/SEG an explanation of the nature of the expenditure and substantiating original documentation (for example, 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). It should be noted that written confirmation of cash payments is not acceptable as proof of payment. 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

22. Admissible expenses are determined on the basis of the criteria contained in section 5 of administrative instruction ST/AI/2018/2. Expenses for full-time school attendance admissible under section 5.1 of the instruction are those that are paid directly to the school or a certified professional providing the required special teaching and special training.
23. Where applicable, boarding expenses are admissible expenses and reimbursed, at the actual cost upon presentation of proof of payment, within the overall maximum ceiling in accordance with the information circular in effect for the academic year for which the claim is made.

Special benefits

24. 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 provided by State and local governments and medical insurance plans. As provided in section 6.5 of administrative instruction ST/AI/2018/2, the amount of admissible educational expenses is reduced by the amount of any special benefits.

Scholarships, bursaries or similar grants

25. Staff members are required to disclose all scholarships, bursaries or similar grants on form P.45/SEG. Financial assistance in the form of a scholarship, bursary or similar grant received directly from or through the educational institution should be certified on form P.41.
26. As provided in section 6.6 of administrative instruction ST/AI/2018/2, 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/SEG.
27. If the amount of the scholarship, bursary or similar grant does not exceed the non-admissible educational expenses, the special education 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 special education grant is then calculated on the basis of the remaining admissible expenses.

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

29. Section 8.4 of administrative instruction ST/AI/2018/2 provides that when a staff member dies while in service at or after the beginning of the academic year, the amount of the grant and the related benefit for that academic 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 the duty station or another location, subject to the maximum expenses allowed under section 11.1 of the instruction.

30. As a result:

- There will be no prorating or disqualification in respect of any element of the special education grant and the related benefit to which the staff member would have been entitled had he or she lived to the end of the academic year, including education grant travel;
- 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 the related benefit based on a period of service shorter than the normal school year;
- All relevant forms may be completed by the surviving spouse or the legal representative of the child for whom the special education grant and the related benefit 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

31. The provisions of the policy guideline on education grant and related benefits should be followed when making a claim under the special education grant and related benefit entitlement. They are reproduced below for ease of reference:

- 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;
- Staff members should not make a direct purchase of the travel tickets without specific prior authorization;
- 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 sections 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;
- 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 special 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