Information circular[[1]](#footnote-1)\*

 To: Members of the staff

 From: The Assistant Secretary-General for Human Resources Management

 Subject: Education grant and related benefits

 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](https://undocs.org/ST/AI/2018/1..). Staff members are strongly encouraged to review the above-mentioned policy framework before submitting a claim for payment or requesting an advance against the education grant and related benefits entitlement.

2. The purpose of the present circular 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 contained in annex I to the present circular and are available online at https://iseek-newyork.un.org/forms/Allowances%20and%20Benefits. 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.

 II. Requests for advances for the education grant and related benefits ([ST/AI/2018/1](https://undocs.org/ST/AI/2018/1), sect. 7)

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) (see annex I).

 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 amount paid for the previous year’s education grant. 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 an 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 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.

9. When there is a claim for 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 for the previous year (part III of form P.45/EG).

 Settlement of claims and recovery of advances

10. 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](https://undocs.org/ST/AI/2018/1..). Recovery from staff members will normally take place automatically three months after the end of the academic year or before separation from service, whichever comes first.

11. 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 repayment of the advance previously authorized.

 Currency of the advances

12. 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 ([ST/AI/2018/1](https://undocs.org/ST/AI/2018/1), sect. 8)

 Timeline for submission of a claim for payment

13. 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.

 Supporting documentation

14. 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 should request the school 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.

15. 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 invoices, 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.

16. 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.

17. 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, invoices, 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 ([ST/AI/2018/1](https://undocs.org/ST/AI/2018/1), sect. 3.1)

18. Expenses for full-time school attendance admissible under section 3.1 of administrative instruction [ST/AI/2018/1](https://undocs.org/ST/AI/2018/1) are those that are paid directly to the school or are certified by the school as being necessary for school attendance.

 Expenses for private tuition in the mother tongue

19. In addition to the expenses mentioned in paragraph 18 above, expenses for private tuition in the mother tongue are admissible when all the conditions of section 3.1 (c) of administrative instruction [ST/AI/2018/1](https://undocs.org/ST/AI/2018/1) are met.

20. 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, 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 ([ST/AI/2018/1](https://undocs.org/ST/AI/2018/1), sects. 2.5–2.8 and 4)

21. A lump sum of $5,000 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](https://undocs.org/ST/AI/2018/1..). 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

22. 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 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 Management.

 C. Scholarships, bursaries or similar grants ([ST/AI/2018/1](https://undocs.org/ST/AI/2018/1), sect. 3.5)

23. 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 certified on form P.41.

24. As provided in section 3.5 of administrative instruction [ST/AI/2018/1](https://undocs.org/ST/AI/2018/1), 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.

25. 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.

26. 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.

 IV. Death of a staff member after the beginning of the school year ([ST/AI/2018/1](https://undocs.org/ST/AI/2018/1), sects 6.4 and 9.2)

27. Staff rule 3.9 (f) and sections 6.4 and 9.2 of administrative instruction [ST/AI/2018/1](https://undocs.org/ST/AI/2018/1) 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.

28. As a result:

 (a) 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;

 (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 academic year;

 (c) 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.

 V. Travel arrangements and claims ([ST/AI/2018/1](https://undocs.org/ST/AI/2018/1), sect. 9)

29. 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](https://undocs.org/ST/AI/2018/1..).

30. 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.

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

32. 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](https://undocs.org/ST/AI/2018/1..). 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](https://undocs.org/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/2001/43](https://undocs.org/ST/IC/2001/43), or as amended.

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

34. If a child exercised education grant travel in a previous academic year, no new education grant travel will be authorized before the claim for the prior travel has been approved.

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 are included 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) |
| 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 |

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| --- |
| **CERTIFICATE OF ATTENDANCE AND COSTS AND RECEIPT FOR PAYMENTS** |
| **A. TO BE COMPLETED BY THE UNITED NATIONS STAFF MEMBER *(complete items 1-4)*** |
| 1. Name of staff member *(parent)*: | 2. UN index number: | 3. Name of child *(student*): | 4. Child’s date of birth: *(dd/mm/yyyy)* |

**B. TO BE FULLY COMPLETED BY EDUCATIONAL INSTITUTIONS ONLY**

**To:** **Educational institutions attended by a child of a United Nations staff member**

For your information, staff members of the United Nations are entitled, under certain conditions, to an education grant or special education grant. This form has been devised to assist in determining their entitlements and in establishing the amount of the grant. Your cooperation in completing this form will be much appreciated. Please note that the information on this form shall cover **one academic year only.**

Please return the original to the staff member and retain a copy for your files. This may also facilitate confirmation of the information which is performed by the

United Nations on a periodic and routine basis.

|  |  |  |  |
| --- | --- | --- | --- |
|  1. The **academic year** began: |  | and ended: |  |
|  | *(day, month, year)* |  | *(day, month, year)* |
|  2. The **student attended** from: |  | to: |  |
|  | *(day, month, year)* |  | *(day, month, year)* |
|  3. Was the student in **full time attendance**? | [ ]  Yes [ ]  No | Remarks: |  |
|  4. The student was in **grade/level/class/form**: |  | 5. Student **ID No.**: |  |
|  6. Were all **textbooks** provided by the school at no additional cost? | [ ]  Yes [ ]  No |
|  5. If the institution provided **food and lodging** to student, is the corresponding expense included in the tuition? | [ ]  Yes [ ]  No | If yes, the cost was  |  |
|  6. If the institution charged for a **lunch programme,** is the corresponding expense included in the tuition? | [ ]  Yes [ ]  No | If yes, the cost was  |  |
|  7. If daily group **transportation** was provided by or through the institution, is the corresponding expense included in the tuition? | [ ]  Yes [ ]  No | If yes, the cost was  |  |
| 8. Did the institution charge a fee to fund the construction, upgrade, refurbishment and maintenance of the buildings? (Such fees may be known as capital assessment fee, building levy/fund/fee, capital levy/fund/fee, first-time parent fee, incorporation fee or development fee.) | [ ]  Yes [ ]  No | If yes, the cost was |  |
| 9. Was the child’s enrolment or continued enrolment conditional upon the payment of the above fee?  | [ ]  Yes [ ]  No | If yes, the cost was |  |
| 10. The institution charged the following **expenses** *(please indicate the currency):* |
|  (a) **Enrollment-related fee** |  (b) **Tuition** |  (c) **Special teaching**  |  (d) **Special equipment**  |  |
|  |  |  |  |  |  |  |  |  |
| (e) List **other mandatory expenses** charged by the institution (e.g., lunch, material, lab equipment, etc.). Provide a brief description of the expenses and indicate the amounts charged:**\*** |
| (f) List any **optional expenses** elected by the student:**\*** |
| 11. If applicable, the amount of **non-UN scholarship, grant(s) or any financial assistance received by the child or the staff member** *(excluding loans)*: |  |
| 12. The UN staff member (parent) made the following **payments** *(including loan payments*) to the institution:**\*** |
| *Enrollment-related fee* *(indicate currency, amount and date)* | *Tuition* *(indicate currency, amount and date)* | *Special teaching (indicate currency, amount and date)* | *Special equipment (indicate currency, amount and date)* |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| *Other mandatory expenses* *(indicate type of expense, currency, amount and date)* | *Optional expenses (indicate type of expense, currency, amount and date)* |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| 13. School name and address: |  |
| 14. Telephone No.: |  | 15. Fax No.: |  | 16. Email address: |  |
| 15. Name and title of officer authorized to sign on behalf of the educational institution: |  |
| 16. Signature of officer: |  | Date: |  |
|  |
| 17. Seal of educational institution: |  |

\*If necessary, please itemize on a separate attached sheet and ensure that it is initialled by the signatory.

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|  |  |  |
| --- | --- | --- |
| UNITED NATIONSNATIONS UNIES |  | **CERTIFICATE OF TUITION IN THE MOTHER TONGUE****ATTESTATION CONCERNANT L’ÉTUDE DE LA LANGUE MATERNELLE** |

|  |  |  |
| --- | --- | --- |
| Name of child / *Nom de l’enfant* | Name of staff member / *Nom du fonctionnaire* | ID # / *Numéro de la carte d’identité* |

**To: Educational institution or tutor**

Staff members of the United Nations are entitled, under certain conditions, to payment of an education grant. Subject to some requirements, the cost of tuition in the mother tongue is taken into account for the purposes of the grant. This form has been devised to assist in determining the costs incurred by the staff member for such tuition and must be accompanied by cancelled cheques or copies of original cheques accompanied by bank statements. Your cooperation in completing this form will be much appreciated. Please return the original to the staff member and retain a copy for your files. This may also facilitate confirmation of the information, which is performed by the United Nations on a periodic and routine basis.

***Destinataires : L’établissement d’enseignement ou le professeur***

*Les fonctionnaires de l’ONU ont droit, sous réserve de certaines conditions, à une indemnité pour frais d’études. Sous réserve aussi de diverses conditions, le coût de l’enseignement de la langue maternelle entre en ligne de compte pour le calcul de l’indemnité. La présente formule a pour objet de déterminer les frais que cet enseignement a entraînés pour le fonctionnaire. Vous devez y joindre les chèques payés et oblitérés ou une copie des chèques originaux accompagnée des relevés bancaires correspondants. Le concours que vous prêterez en remplissant le formulaire sera vivement apprécié. Veuillez retourner l’original au fonctionnaire de l’ONU et conserver un double dans vos dossiers. Ce formulaire pourra aussi aider l’ONU dans ses vérifications ordinaires périodiques.*

|  |
| --- |
| This is to certify that (child’s name) received tutoring in the language *Je certifie que (nom de l’enfant)* *a suivi des cours de (langue enseignée)*during the period from (day/month/year) until (day/month/year) .*pendant la période du (jour/mois/année)* *au (jour/mois/année)*He/she was taught / *L’enfant a suivi des cours* daily/*chaque jour* (yes/no) *(oui/non)* from/*de* (am/pm) *(heures)* to/*à* (am/pm) *(heures)*, or/*ou* weekly/*chaque semaine* (No. of days/*nombre de jours*) from/*de* (am/pm) *(heures)* to/*à* (am/pm) *(heures)*, or/*ou* monthly/*chaque mois* (No. of days/*nombre de jours*) from/*de* (am/pm) *(heures)* to/*à* (am/pm) *(heures)*.Total number of lessons for the year: .*Nombre total de leçons durant l’année:*The tuition was on a group [ ]  or individual [ ]  basis (please check one). The tuition fees were per hour/lesson.*S’est-il agi de cours collectifs* [ ]  *ou de leçons particulières?* [ ]  *Le tarif a été de l’heure/la leçon.*(For instruction by a private tutor, please attach evidence of your certification as a teacher of the language of instruction)*(Dans le cas de leçons particulières, joindre votre certificat d’aptitude à l’enseignement de la langue concernée)*(Please attach a brief statement on the child’s linguistic ability in this language)*(Veuillez joindre une brève description des capacités de l’enfant dans la langue enseignée)* |
| Payments were made by the staff member to the institution or tutor as follows:*Le fonctionnaire a acquitté à l’établissement ou au professeur les montants ci-après :*  |
| Currency, amount and date*Monnaie, montant et date* | Currency, amount and date*Monnaie, montant et date* | Currency, amount and date*Monnaie, montant et date* | Currency, amount and date*Monnaie, montant et date* |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

PLEASE COMPLETE ALL SECTIONS AND ENSURE THAT ANY ATTACHMENTS OR CORRECTIONS ARE INITIALLED BY THE SIGNATORY. FOR PRIVATE TUTORS, PLEASE PROVIDE EVIDENCE OF CERTIFICATION IN THE LANGUAGE OF INSTRUCTION.

**IMPORTANT:**

*VEILLEZ À COMPLÉTER TOUTES LES SECTIONS ET À CE QUE TOUTE PIÈCE JOINTE OU CORRECTION SOIT PARAPHÉE PAR LE SIGNATAIRE. DANS LE CAS DE LEÇONS PARTICULIÈRES, JOINDRE VOTRE CERTIFICAT D’APTITUDE À L’ENSEIGNEMENT DE LA LANGUE CONCERNÉE.*

|  |  |
| --- | --- |
| SEAL of educational institution(if applicable)*CACHET de l’établissement d’enseignement**(le cas échéant)* | Name and title of officer signing on behalf of institution or of tutor/*Nom et qualité de l’administrateur ayant la signature ou du professeur* |
| **SIGNATURE:** |
| School address/*Adresse de l’établissement* | Telephone No./*Numéro de téléphone*(home/*domicile*):(work/ *bureau*): |
| Tutor’s address/*Adresse du professeur* |

P.41/A (3-18)

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| **Certificate of school attendance** |
|  | **For the academic year**  |  |  |
| *(Please type or print all information legibly)* |
|  |
|  |
|  | This is to certify that |  |  |
|  *(Name of child)* |  |
|  |
| son/daughter of  |  |  |
|  *(Name of staff member)* |
|  |
| was in full-time attendance at |  |
|  *(School/college/university)* |
|  |
| and regularly attended class in the |  | grade |
|  *(Form, level or class)* |
| from  |  |  |  | to |  |  |  |  |
|  | *(Day)* | *(Month)* | *(Year)* |  | *(Day)* | *(Month)* | *(Year)* |  |
|  |
| The actual school year began on  |  |  |  |
|  | *(Day)* | *(Month)* | *(Year)* |
|  |
| and ended on  |  |  |  |  |  |
|  | *(Day)* | *(Month)* |  *(Year)* |  |
| SEAL OFEDUCATIONAL INSTITUTION | Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
|  |
| Name and title of officer  |
| signing on behalf of educational institution |
|  |
| Date: Place:  |  |
|  |
|  |
| For United Nations use only: |
| Name of staff member | Index No. | Dept./Div./Office |  |  |
|  |  |  |

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| **Certificate of attendance in summer courses** |
|  | **For the academic year**  |  |  |
| *(Please type or print all information legibly)* |
|  |
|  | This is to certify *that that*  |  |  |
|  *(Name of child)* |  |
|  |
| son/daughter of  |  |  |
|  *(Name of staff member)* |
| was **required to attend a summer course/summer courses as a prerequisite** for further attendance during the subsequent regular school year **and** for the school’s regular diploma at |
| ***attendance*** *at* |  |
| *(School/college/university)*

|  |  |
| --- | --- |
| The student’s level of instruction was      |  |
|  | *(Grade/class/form/level)* |

The summer course[s] attended was/were:

|  |  |
| --- | --- |
| *(a)* |  |
| *(b)* |  |
| *(c)* |  |
| *(d)* |  |

  |
| from  |  |  |  | to |  |  |  |  |
|  | *(Day)* | *(Month)* | *(Year)* |  | *(Day)* | *(Month)* | *(Year)* |  |
|  |
| The actual school year began on  |  |  |  |
|  | *(Day)* | *(Month)* | *(Year)* |
|  |
| and ended on  |  |  |  |  |  |
|  | *(Day)* | *(Month)* | *(Year)* |  |
| SEAL OFEDUCATIONAL INSTITUTION | Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
|  |
| Name and title of officer  |
| signing on behalf of the educational institution |
|  |
| Date: Place:  |  |
|  |
|  |  |  |
| For United Nations use only: |
| Name of staff member | Index No. | Dept./Div./Office |  |  |
|  |  |  |

P.41/D (2-18) - E

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**EDUCATION GRANT AND RELATED BENEFITS**

**CLAIM FOR PAYMENT AND/OR REQUEST FOR ADVANCE**

***INSTRUCTIONS:*** When submitting a claim for payment and/or a request for advance, you must complete parts I and II of this form. In addition, please complete:

* Part III if you are submitting a claim for payment of the education grant and related benefits and/or
* Part IV if you are submitting a request for an advance against the education grant and related benefits.

For each child, attach documentation to substantiate the amounts requested/claimed.

|  |
| --- |
| 1. **REQUEST/CLAIM AND CERTIFICATION**

[ ] I request an advance against the education grant and related benefits for the academic year 20       to 20       AND/OR [ ] I claim the education grant and related benefits for the academic year 20       to 20       I understand: * That any advance will be recovered from my salary if a claim for payment is not submitted within the set deadline;
* My obligation to retain for five years the supporting documentation in its original form or scanned copies certified as seen by a UN official and to submit it upon request for monitoring and compliance purposes;
* My obligation to promptly inform the Organization of any changes in the information or estimates provided in support of my request/claim;
* That the Organization may conduct a compliance review of my requests or claims;
* The consequences of submitting incomplete, unsubstantiated or false information, as discussed in section 10.4 of ST/AI/2018/1.

I attest:* To the correctness of the information provided herewith;
* That I have disclosed all scholarships, bursaries or similar grants received from the school or any other entity in respect of the child/children;
* That no other education grant is being paid in respect of the child/children for the periods indicated;
* The child for whom I am claiming boarding assistance does not reside with his/her other parent. *(if applicable)*

I authorize the United Nations to contact the educational institution directly and to request any information or documentation related to the present request and/or claim. Signature of staff member: …………………………… Date: \_\_\_\_\_     \_\_\_\_\_\_ (dd/mm/yyyy) |
|  |

**\* Please note that for the claim to be valid, it must be submitted on a double-sided form.**

|  |  |  |
| --- | --- | --- |
| **UNITED NATIONS** | **UN** | **CLAIM FOR PAYMENT OF EDUCATION GRANT AND RELATED BENEFITS****AND/OR ADVANCE AGAINST THE EDUCATION GRANT AND RELATED BENEFITS** |
| **II. Staff member: *(parts I and II must be completed)*** |
| Last name of staff member  | First | Middle initial  | Index No. | Level | Dept. or Div. | Ext. | Room No. |
| Type of appointment | Expiry date | Entrance on duty date(day/month/year)  | Home country | Duty station | Type of U.S. visa |
| Is the child’s other parent a staff member of the United Nations common system? | [ ]  Yes [ ]  No |  | If yes, is the other parent requesting an advance/claiming education grant as well? | [ ]  Yes [ ]  No |
| Child’s name  |  |  |  |
| Date of birth (day/month/year) |  |  |  |
| Name of school or university attended |  |  |  |
| Location of school (city, country) |  |  |  |
| Level of instruction(class or grade) |  |  |  |
| **III. Claim for education grant and related benefits** |
| Academic year(from – to) | Day/month/year – day/month/year | Day/month/year – day/month/year | Day/month/year – day/month/year |
| Child attended school (from – to)(attach form P.41/B) | Day/month/year – day/month/year | Day/month/year – day/month/year | Day/month/year – day/month/year |
| Actual cost (attach form P.41 and/or other receipts) | Currency and amount | Currency and amount | Currency and amount |
| Tuition in mother tongue (attach form P.41/A) | Currency and amount | Currency and amount | Currency and amount |
| Other private tuition | Currency and amount | Currency and amount | Currency and amount |
| Scholarship, bursary and similar grant  | Currency and amount | Currency and amount | Currency and amount |
| Boarding assistance | Check box [ ]  | Check box [ ]  | Check box [ ]  |
| Child was boarding (from – to) | Day/month/year – day/month/year | Day/month/year – day/month/year | Day/month/year – day/month/year |
| Capital assessment fee | Currency and amount | Currency and amount | Currency and amount |
| **IV. Request for advance against the education grant and related benefits** |
| Academic year(from – to) | Day/month/year – day/month/year | Day/month/year – day/month/year | Day/month/year – day/month/year |
| Education grant(see ST/IC/2018/7, paras. 4–9)  | US$  | US$  | US$  |
| **FOR OFFICIAL USE OF OHRM** |
| School location | DUTY STN [ ]  HOME CTRY [ ]  OTHER CTRY [ ]  | DUTY STN [ ]  HOME CTRY [ ]  OTHER CTRY [ ]  | DUTY STN [ ]  HOME CTRY [ ]  OTHER CTRY [ ]  |
| Admissible cost |  |   |    |
| Maximum entitlement(if prorated) |  |  |  |
| Advance requested in part IV authorized |       |  |  |
| Staff member entitled as above.For the ASG, OHRM: (print name and SIGN)  | Date:  |

P.45/EG (2-18)

**Annex II**

 **Education grant entitlements — global sliding scale**

(United States dollars)

| *Amount of admissible expenses — claim amount bracket*  | *Reimbursement rate (percentage)*  | *Maximum reimbursement amount*  |
| --- | --- | --- |
|  |  |  |
| 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  |
|  **Maximum total** |  | **30 566** |

*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 |
|  **Total** | **27 149** |

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

1. \* The present circular is in effect until further notice and supersedes ST/IC/2014/12/Rev.1, ST/IC/2017/15 and ST/IC/2017/15/Corr.1. [↑](#footnote-ref-1)