

HR.SOP.III.151

Education Grant Cost Sharing Between Organizations

GSC/GHR

HR Standard Operating Procedure
Target Audience: All Staff

DISCLAIMER

Standard Operating Procedures (SOPs) provide a step-by-step guide for staff directly involved in the processing of administrative actions to support and facilitate the implementation of WHO policies and procedures. The SOPs are for guidance only; they are neither authoritative nor binding. The SOPs reflect the policies and procedures of WHO at the time of writing; however, policies and procedures change from time-to-time. In the case of a conflict between the SOPs and the WHO eManual provisions, the WHO eManual provisions take precedence.

DOCUMENT SPECIFICATIONS

Version	Date of revision	Author (s) / Dept / Unit	Approver	Indicate which section changed compared to previous version
0.1	09.01.2012	S. Ragupathi, GSC/GHR		
0.2	03.2012	Further review with C. Begue, Payroll		
0.3	12.06.2012	Final review with Payroll		
0.4	18.06.2012	JM		Inserted Visio
0.5	27.06.2012	S. Amaudruz, HRD/HPJ review		Inserted FIN.SOP.XII.090 – Payroll process
0.6	25.07.2012	S. Amaudruz, HRD/HPJ & C. Begue, PAY		Agree when staff completes 2/3rds school year and full grant due, WHO will pay and Payroll will recover pro-rata months from receiving Organization.
0.7	25.09.2012	Mouna Laroussi, GHR & S.Amaudruz, HRD/HPJ		<p>No paper forms unless extreme case with no access to GSM.</p> <p>Pro-rata amount recovered from other agency in all cases.</p> <p>No need for option for staff to pay WHO the portion which WHO recuperates from receiving org.</p> <p>If full year completed (or 2/3rds of school year completed) staff submit final claim before departure.</p> <p>For all other cases Payroll at the end of school year sends list to UN agency, who return final claim copy and amount paid to payroll. GHR enters the final amount in</p>

				the education grant forms and runs education grant elements. Payroll recovers from other org or makes payment to receiving org.
0.8	25.10.2012	Incorporated GHRs and Payroll's final comments	S.-E.Amaudruz	Ready for Management Approval
0.9	29.10.2012	Visio revised.		
1.0	20.12.2012		S E Amaudruz, HRD/HPJ N Jeffreys, Comptroller M Altmaier, Director, HRD	Approved for publication in eManual.

1. INTRODUCTION

1.1. Overview/Description

This Standard Operating Procedure (SOP) explains the process related to sharing of costs of education grant reimbursement between releasing and receiving Organizations when a staff member who is entitled to Education Grant is leaving the Organization either on inter-organization transfer or on secondment.

1.2. General Guidance / Business Rules

Manager initiates HRAP for separation by inter-agency transfer or secondment.

As part of the separation process and standard education grant process, the staff member initiates Education Grant Self-Service through GSM – see HR.SOP.III.150 on Education Grant & Special Education Grant Request.

Staff member obtains from the current educational institution either :

- i) estimate of education grant costs for the full scholastic year; or where possible,
- ii) the actual education costs incurred up to the date of separation and submits claim together with paid invoices and proof of payments.

If the staff member's service and/or child's attendance is for the whole school year or minimum 2/3rds, the staff member submits the Final Education grant claim before departure. GHR process the full payment for the year. If the staff member does not submit a claim before departure, GHR, recovers the full amount of the advance from any payments due on the last month of salary and closes the case.

For all other cases, where the staff member's service is less than 2/3rds of the school year, GHR inform Payroll on a bi-annual basis a list of staff who were seconded or transferred to other UN agencies. Payroll verifies the status of the Education Grant advances which may be outstanding for the staff member and contacts the UN Agency to request a copy of the final Education Grant Claim. GHR calculates and if any amount is due to WHO from the other Agency provides details to Payroll who recovers from the UN agency. Once the money has been recovered, Payroll informs GHR who closes the claim in GSM on behalf of the staff member.

1.3. Reference Material

1.3.1. Staff Rules

- 350

1.3.2. WHO eManual

- III.3.5 Education Grant
- III.4.7 Inter-organization transfer or secondment

1.3.3. UPKs

- Education Grant 5.370 – 5.374

1.3.4. Related SOPs

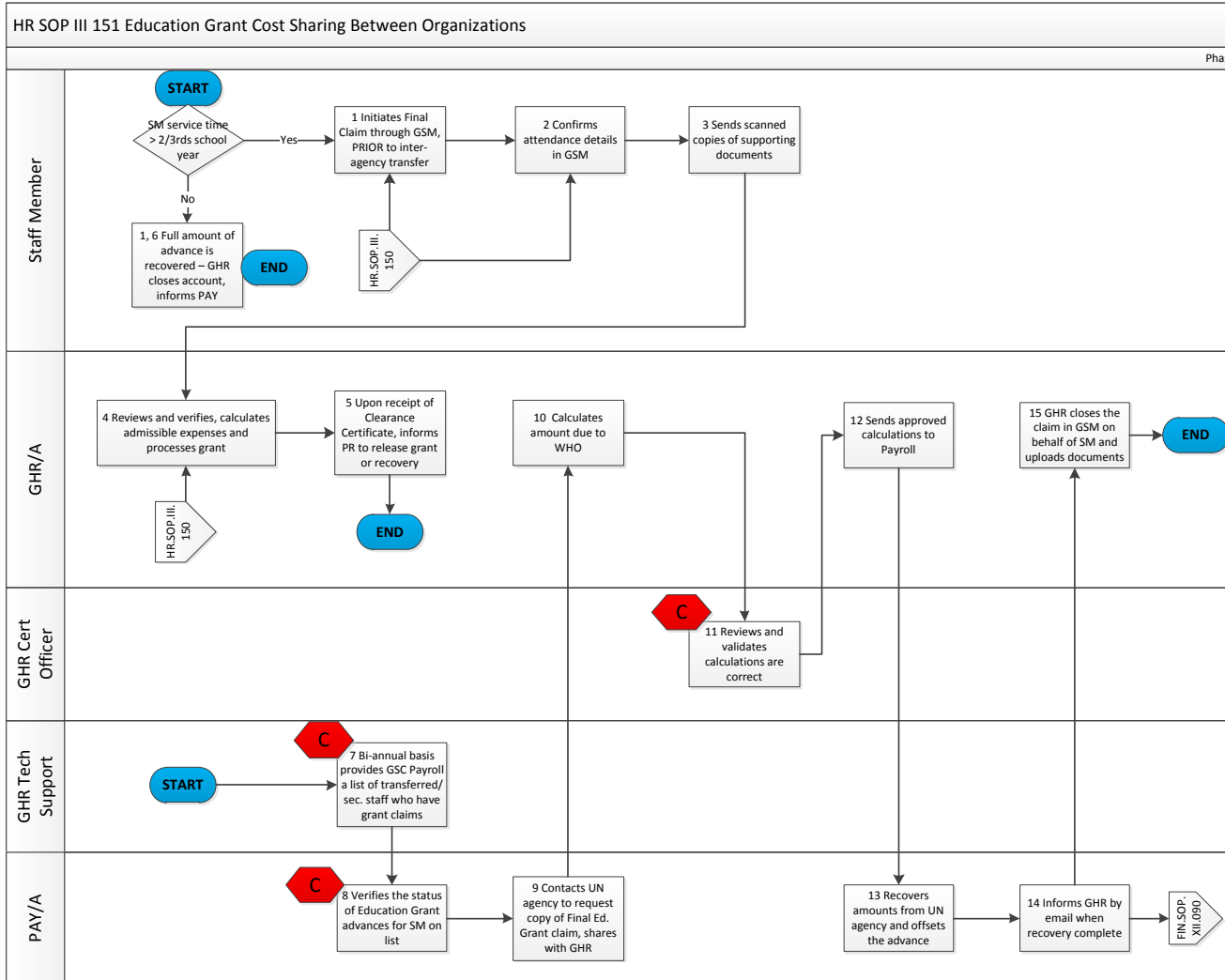
- HR.SOP.III.150 Education Grant & Special Education Grant Request
- FIN.SOP.XII.044 Education Grant Payroll Process
- FIN.SOP.XII.090 Education Grant Payroll Process for Cost Sharing between Organizations

1.4. Other

1.4.1. Definitions

- SM Staff member
- GHR/A Global Human Resources / HR Administrator
- GHR/CO Global Human Resources / Certifying Officer
- PAY/A Payroll Administrator

2. PROCESS FLOW



3. PROCESS STEPS

Step	Control (C)	Type	Process	Role / Responsibility
1		GSM Input	<p>Provided the staff member 's service time covers 2/3rd's of the school year , Submits the Final Claim through Education Grant Self-Service in GSM prior to separation by Inter-Agency transfer. (See HR.SOP.III.150 Education Grant & Special Education Grant Request).</p> <p><i>[If S/m does not initiate the final claim, full amount of the advance is recovered from the Terminal Emoluments and GHR closes the account and informs Payroll]</i></p>	Staff Member
2		GSM	<p>Confirms attendance details appropriately through Education Grant Self-Service in GSM depending on whether child will change schools at the time of inter-agency transfer, or will remain at same school for the full scholastic year. (See HR.SOP.III.150 Education Grant & Special Education Grant Request).</p>	Staff member
3		Offline	<p>Sends scanned copies of supporting documents using the Education Grant records naming convention to gschrservices@who.int, i.e.:</p> <ul style="list-style-type: none"> • Bills and receipts for full year education costs received and proof of payments to date of separation. 	Staff member
4		Offline & GSM	<p>Reviews and verifies claim and receipts and calculates admissible expenses and processes education grant as per the Standard HR.SOP.III.150.</p>	GHR Administrator
5		GSM	<p>Upon receipt of the Clearance certificate, informs Payroll to release the education grant payment or recovery from the last month of salary.</p>	GHR Administrator

6		Offline	<p>If the staff member's service time is less than 2/3rds of the scholastic year - Staff member transfers to the other UN agency and where there is an outstanding advance WHO is responsible for recovering any outstanding amount if appropriate from the other UN agency.</p> <p><i>[GHR will provide details of overpayment and Payroll will communicate with other agency for recovery]</i></p>	Staff Member
7	C	GSM	<p>On a bi-annual basis, provides the GSC Payroll unit with a list of staff who left WHO on secondment or transfer to another UN agency (and who have outstanding education grant claims for the year in which the staff member was transferred, with the following details:-</p> <ul style="list-style-type: none"> • Name • Date of transfer • UN agency • Contact person if available 	GHR Technical Support team
8	C	GSM & Offline	Verifies the status of the Education Grant Advances for the staff members on the list.	Payroll administrator
9		Offline	Contacts UN Agency to request a copy of the Final Education Grant claim and shares it with GHR upon receipt.	Payroll Administrator
10		GSM & Offline	Calculates the amount due to WHO if any from the other Agency and sends calculations for review and approval.	GHR Administrator
11	C	Offline	Reviews and validates calculations are correct.	GHR Certifying officer
12		Offline	Sends approved calculations to Payroll.	GHR Administrator
13		Offline	Recovers amounts from UN Agency and offsets the advance.	Payroll Administrator

14		Offline	Informs GHR by email when recovery is completed.	Payroll Administrator
15		GSM	GHR closes the claim in GSM on behalf of the staff member and uploads the relevant correspondence and instructions from Payroll to RMS-staff member folder – Private verifications and entitlements.	GHR Administrator
16		Offline	See FIN.SOP.XII.090 - Education Grant Payroll Process for Cost Sharing between Organizations	Payroll Administrator

4. KEY RISKS & COMPENSATING CONTROLS

Risks	Compensating Controls	Process Step
Over/underpayment due to error in administration of the pro-rata entitlement	GHR Certifying Officer checks calculation and signs off.	11
Outstanding amount due from receiving organization is not reimbursed to WHO/Payroll	Payroll Administrator negotiates and follows-up with receiving Organization. Legal basis is the Inter-Organization agreement applies – WHO eManual III.4.7.	7, 8 and 9 and FIN.SOP.XII.090