



**UNDP/ADM/98/74**

**24 November 1998**

To: All UNDP/UNFPA/UNOPS/ Staff

From: Deborah Landey  
Director  
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Subject: **Delegation of authority to verify and authorize Home Leave and Education Grant Travel - effective: 1 March 1999**  
**Universal "Points System" for Home Leave - effective: 1 January 1999**

### Summary

- Streamlined procedures and improved response to the personal needs of the staff in respect of home leave and education grant travel, with more agility in the administration of the entitlement;
- Universal application of the "points system" to determine entitlement and timing of home leave (discontinuance of the even year/odd year home leave for 24-month cycle duty stations);
- Delegation of authority to verify and authorize home leave travel;
- Delegation of authority to verify and authorize education grant travel for dependent children attending educational institutions away from the duty station, allowing more expeditious arrangements in accordance with personal circumstances and preferences of the staff member and his/her family.

### Background

1. As described in circular [UNDP/ADM/98/68](#) of 16 October 1998 on the subject of "Aligning our personnel administration services with the needs of UNDP 2001", a series of re-engineering and streamlining measures have been undertaken in the area of administration of staff members entitlements. Annex I provides an up-dated summary of the measures announced. I am now pleased to announce in this circular another step in this process: the management of home leave and education grant travel.

2. The verification/approval of the entitlement to home leave and education grant travel has been effected by UNDP/BPRM/OHR; country offices are responsible for the travel arrangements and settlement of the F. 10 or verification of the PT. 165.

3. At present, a point-system is used to determine the timing of home leave for staff serving in 12-month cycle duty stations (hardship classification C, D, and E). For 24month cycle

locations and at Headquarters 'hardship classification H, A and B), an even year/odd year system is used. This dual approach is cumbersome and confusing and has been found to present some inequities when staff are reassigned between duty stations for which the measurement systems are different.

#### New Measures effective 1 March 1999

4. Effective 1 March 1999, the authorization to verify these entitlements is being delegated to the heads of country offices and locations away from UNDP Headquarters (Geneva, Bonn, Brussels, Copenhagen, Tokyo and Washington). Instructions are provided in the attached guidelines for the administering offices to exercise this delegation. This delegation does not comprise home leave or education grant travel in conjunction with reassignment or other official travel which will continue to be verified by UNDP/BPRM/OHR.

5. This delegation applies to UNDP staff members governed by the 100 and 200 Series of the Staff Rules. Staff on secondment from other Agencies will be administered under these arrangements during their period of secondment. UNDP ALD appointees are not covered by the measures described here.

6. Deputy Resident Representatives will authorize home leave and education grant travel entitlements of Resident Representatives and their dependants. The timing of Resident Representatives' home leave will continue to be approved by the Regional Bureaux. UNFPA Headquarters in New York will continue to approve the timing of home leave of UNFPA Representatives. Country offices, however, will verify the entitlement and administer the home leave.

7. UNDP/BPRM/OHR will continue to be responsible for the administration of these entitlements in respect of international staff members assigned to New York.

#### Universal Application of the points system for home leave travel

8. To streamline the procedures and to bring the desired equity in the application of this entitlement, starting 1 January 1999, the points system will begin to apply to all duty stations including Headquarters, regardless of the home leave cycle. For 12-month home leave cycle duty stations, two points per month will continue to be accrued. For 24-month home leave cycle duty stations, one point per month will be accrued. The maximum points accrual, previously 32, will be increased to 40.

9. The home leave entitlement is based on the accrual of 24 points. However, UNDP flexibility arrangements will permit staff to take home leave when a minimum of 12 points have been reached. Whenever home leave is taken, from the minimum accrual of 12 to the maximum accumulation of 40 points, a deduction of 24 points will be recorded.

10. For staff assigned to 12-month home leave cycle duty stations, currently under the point system there is already a point accrual balance. In the case of staff assigned to 24-month home leave cycle duty stations, the point system will start to apply as from the next home leave falling due after 1 January 1999, so as to give as much advance notice as possible about the change in procedures.

#### Education grant travel

11. The system of education grant travel, the rules of eligibility and conditions governing

this entitlement remain unchanged. The key change being introduced at this time is the delegation of verification and approval from OHR to administering offices.

#### Transfer of home leave and education grant travel records to administering offices

12. During the first quarter of 1999, UNDP/BPRM/OHR will transfer to administering offices individual records of international staff members in respect of home leave points accrued after the most recent home leave (for staff members assigned to 12- home leave cycle duty stations) or on the next home leave (for staff assigned on 24-months home leave travel duty stations). Individual records in respect of the entitlement to education grant travel will also be transferred. A home leave travel record card and an education grant travel record card prepared by OHR will be transferred to the administering offices. Specific instructions on maintaining these cards and transferring of the staff members records on reassignment or separation are contained in the attached guidelines.

#### Submission by staff members of requests for travel

13. Both for home leave and education grant travel staff members will be required to submit a request form to the appropriate administrative officer. These forms will be available at the administering office (See Annex III-A and IV-A).

14. Resident Representatives/Heads of Offices are required to ensure that contents of this circular are made available to the staff in charge of administration and to all internationally-recruited staff.

# Delegation of authority to verify and authorize Home Leave and Education Grant Travel

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# GUIDELINES FOR ADMINISTERING OFFICES TO VERIFY AND APPROVE HOME LEAVE AND EDUCATION GRANT TRAVEL.

## INTRODUCTION

These guidelines provide the administering offices with instructions for the verification and approval of home leave and education grant travel entitlements. The relevant sections of the Personnel Manual must be consulted for additional clarification.

The present instructions detail changes mainly in respect of the verification/approval authority, the handling of arrangements, the establishment of a universal "points accrual" system for all duty stations and the conversion of the shipping entitlement.

### I. HOME LEAVE TRAVEL

#### 1. Purpose, relation with hardship classification and flexibility in the use of this entitlement.

(a) The purpose of home leave travel is to enable internationally-recruited staff members and recognized dependants, who are serving outside their home country, to return to their home country periodically in order to renew their professional and personal ties.

(b) On the basis of hardship classifications, ICSC designates duty stations as being on a 24-month or 12-month home leave cycle. An up-dating of the classification of duty stations according to conditions of life and work ("Hardship classification") is published in January of every year.

(c) The flexibility in the use of this entitlement, introduced in circular UNDP/ADM/95/31 dated 21 March 1995, remains valid.

#### 2. Universal application of the "Points System" - Points accrual

(a) Previously, a "points system" was used to determine the timing of home leave for staff serving in 12-month cycle duty stations (hardship classification C, D and E); for 24 month cycle locations and at Headquarters (Classification H, A and B) an even year/odd year system was used. This dual approach was cumbersome and had been found to present some inequities when staff are reassigned between duty stations for which the measurement systems are different. The "points system" is in effect at all duty stations from 1 January 1999 onwards.

(b) Under the revised arrangement, staff assigned to 12-month home leave cycle duty stations will accrue 2 points per month and those assigned to 24-month cycle will accrue 1 point per month. However, home leave points will not accrue during a staff member's assignment to home country.

(c) The home leave entitlement is based on the accrual of 24 points. However, UNDP flexibility arrangements will permit staff to take home leave when a minimum of 12 points have been reached. Whenever home leave is taken, from the minimum accrual of 12 to the maximum accumulation of 40 points, a deduction of 24 points will be recorded.

### 3. Transition to the "points system"

(a) At the time of introduction of the current guidelines, certain transitional steps must be taken in order to begin to apply the accrual of points for those staff for whom this system did not previously apply, i.e. for staff members assigned to 24-month home leave cycle duty stations under the odd/even year system. These transitional steps will apply as of the first home leave taken after the introduction of the universal points system, that is the first home leave after 1 January 1999. A detailed description of the transitional measures is provided in Annex II.

(b) For information regarding the transfer of records to administering offices, at the start up of the system, see section 10 below.

### 4. Conditions for eligibility

Eligibility for home leave is conditional upon the staff member's contract being continued for at least six months beyond the date of accrual of 24 points. However, staff may exercise flexibility in the use of home leave as long as they return to the duty station for at least a 3-month period before the expiration of the contract. The administering offices must contact the Personnel Specialist of UNDP/BPRM/OHR in cases where a renewal of contract is pending.

### 5. Timing of Home Leave

(a) The entitlement to home leave becomes due when 24 points have been accrued. Sound management discretion is to be applied in requiring or permitting postponement of home leave. Lengthy deferrals may create unexpected problems in the office and to the staff member.

(i) Home leave travel before accruing 24 points

- at least 12 points must have been accrued; 24 points will be deducted when home leave is taken. Thus, the Home Leave Record Card (see section 10 below) will indicate a negative point accrual of up to 12 points. To become eligible for the next home leave, the staff member must overcome the negative point balance and then reach an accrual of 24 points.

(Note: Staff members who travel before accruing 24 points and who for any reason separate before completing the required six months of service beyond the date when 24 points will have been accrued, will be required to reimburse all expenses or the cost of the one way airticket if considered "repatriation travel". Staff members are to be informed accordingly).

(ii) Home leave travel when more than 24 points have been accrued

- circumstances of exigencies of service or of a personal nature may necessitate a postponement of home leave. When this occurs, no more than 40 points may be accumulated.
- timing of the subsequent home leave is at the discretion of the Head of Office, according to exigencies of service, bearing in mind that there must be an interval of at least three months between home leave and other entitlement travel.

6. Newly appointed staff members and staff being reassigned between duty stations with different home leave cycle/points accrual.

(a) **New appointments:** UNDP/BPRM/OHR will prepare a home leave record card and forward it to the duty station. The following criteria will apply:

- arrival 1 to 15 of the month, accrual of points begin in the month of arrival.
- arrival between the 16 and end of the month, points will commence to accrue in the following month.

(b) **Staff being reassigned:** The releasing duty station will transfer the home leave record card to the new duty station which will record the accrual of points on the basis of the following:

- arrival 1 to 15 of the month: accrual at new duty station points rate.
- arrival between the 16 and the end of the month: accrual at previous duty station points rate.

7. Change in points accrual rate due to reclassification of duty station

A change in points accrual will also be applicable on the effective date of a change in the hardship classification of a staff member's duty station

8. Home leave in conjunction with reassignment or other official travel.

Home leave in conjunction with reassignment or other official travel will continue to be authorized by UNDP/BPRM/OHR. When reassignment is to take place, the administering offices must submit to OHR the staff member's request for home leave travel form HLTR/OHR/99 approved by the Head of Office (refer to Annex V "Handling Arrangements). Staff members are expected to take home leave in conjunction with reassignment, when this is feasible.

9. Shipping entitlement and conversion to accompanied excess baggage

(a) The shipping entitlement for home leave is 50 kgs. surface or 25 kgs. airfreight each way. This may be used in one direction of the journey only, resulting in double the entitlement in total (i.e. 50 kilos used in one direction only will result in 100 kilos in total). Any other combination is acceptable within the overall weight and cost limitations. Costs payable by UNDP refer to freight and cartage. No insurance coverage is provided.

(b) This may be converted to accompanied excess baggage on the basis of the weight entitlement by surface divided by 5 which will result in the corresponding kilos of excess baggage when traveling on airlines which apply this system, or additional piece(s) of baggage within the weight/size limitations when traveling on airlines which apply this system. (i.e. 50 kilos surface divided by 5 equal to 10 kilos excess accompanied baggage or an extra piece of baggage). (Refer to Manual for Operations Management (MOM) Section 1.1.8). When availing of this conversion, staff members must prepay the cost and claim reimbursement in the F.10.

(c) In certain duty stations, staff members and their dependants are entitled to an additional shipment to enable them to replenish some basic goods, supplies and materials which are unobtainable or generally unavailable at the duty station. The additional weight allowance for these shipments is 50 kgs. or 25 by airfreight per year, in one direction only, for each staff member and each accompanying family. These must be single shipments from any place to the duty station in conjunction with home leave, although authorization may be granted regardless of whether home leave is actually taken. This additional entitlement is not transferable between duty stations, nor cumulative from one year to the next. This additional entitlement is also applicable in cases where home leave is taken in conjunction with reassignment to a designated duty station. Duty stations which qualify for the additional shipment are listed in the yearly circular on "Classification of duty stations according to conditions of life and work (Hardship)".

(d) Staff members who avail themselves of this conversion must pre-pay the cost and request reimbursement in the F.10.

(e) The shipping entitlements are not authorized when the lump sum option has been selected.

#### 10. Transferring of records to administering offices - Home Leave Travel Record Card

(a) Administering offices will use Home Leave Record Cards (see Annex III) to keep track of the home leave entitlement of each eligible staff member. For serving staff members, an initial card is made available to the administering offices by OHR (in the first quarter of 1999). On assignment of newly appointed staff, OHR will also make available a home leave record card. Administering offices will record the points accrual and deduct 24 points when home leave is taken in line with instructions in Annex II.

(b) On reassignment, the original must be forwarded to the new duty station and a copy sent to OHR. On separation, the original must be forwarded to OHR. Copies of all records must be maintained at the administering offices for auditing purposes.

(c) These cards must be signed by the staff member: (i) on the initial transfer of records by OHR to administering offices; ii) by all concerned, on a yearly basis; and (iii) on reassignment.

11. Request for home leave travel

Staff members will submit to the administering office, the request for home leave travel, Annex III-A (form HLTR/OHR/99 attached) for verification and approval of the entitlement.

II. EDUCATION GRANT TRAVEL

1. Purpose, relation with hardship classification and flexibility in the use of this entitlement.

(a) Expatriate staff members may find it difficult to ensure schooling for children in their language and cultural tradition. Staff members eligible for the education grant, whose children attend an educational institution outside the country of the duty station for not less than two thirds of the school year, are entitled to the payment of the child's travel expenses for one round trip each scholastic year. This is the "normal" education grant travel.

(b) There is also additional education grant travel for designated hardship duty stations. In these cases, such travel expenses may be paid twice in the year in which the staff member is not entitled to home leave or is entitled but elects not to take it. Designated duty stations are listed in the yearly circular on Classification of Duty Stations According to Conditions of Life and Work (Hardship Scheme). This additional education grant travel may be authorized on the following conditions:

- for staff assigned to 12 months home leave cycle duty stations, the additional education grant travel is allowed only if the staff member elects not to travel on home leave;
- for staff assigned to 24-months home leave cycle duty stations, the additional education grant travel is allowed in the year when the staff member does not travel on home leave.

(c) The increased flexibility in the use of this entitlement introduced in circular UNDP/ADM/94/28 of 17 May 1994 remain valid provided all travel of the child and/or the parents meet the conditions of eligibility.

2. Conditions of eligibility:

- (a) The following conditions must be met:
- the staff member's contract should cover at least 2/3 of the child's school year (i.e. at least six months).

- the child must be in full-time attendance at a school (or attend at least 2/3 of the school year), university or similar educational institution away from the duty station, for which education grant is payable. (On receipt of the education grant claim, OHR will inform administering offices of cases when children have not attended 2/3 of the school year. Administering offices will proceed to obtain reimbursement of travel expenses from the staff member).
- the years of eligibility are those from the beginning of the primary level up to the day on which the child ceases full-time attendance at an educational institution, or through the end of the school year in which the child has attended 4 years of post-secondary studies, or awarded the first recognized degree, whichever is earlier;
- in all cases, the child will normally not qualify beyond the year in which he/she reaches the age of 25. Exceptions should be referred to UNDP/BPRM/OHR.

### 3. Timing of education grant travel

(a) Education grant travel entitlements are determined on the basis of the scholastic year, not the calendar year.

(b) Travel authorized for a specific school year cannot be transferred to the next school year. It must be undertaken during the school year it was authorized for, or prior to the commencement of the next school year. Travel is also authorized on the condition that the F.10 or PT.165 for the previous travel has been submitted.

### 4. Education grant travel in conjunction with reassignment

Education grant travel in conjunction with reassignment will continue to be authorized by the relevant Personnel Specialist of OHR. When reassignment is to take place and the staff member requests education grant travel, the administering office must submit to OHR the request for education grant travel, form EGTR/OHR/99 approved by the Head of Office.

### 5. Shipping entitlement and conversion to accompanied excess baggage

- (a) The shipping entitlement for children on education grant travel is:

- 200 kilos surface or 100 kilos airfreight on (i) first time attendance to school away from the duty station (ii) on return when the entitlement ceases, and (iii) on change of educational institution. Costs payable by UNDP refer to packing, cartage, freight, unpacking and uncrating. No insurance coverage.
- 50 kilos surface or 25 kilos airfreight for each leg.
- Costs to be born by UNDP refer to freight and cartage. No insurance coverage.

(b) The conditions detailed under I 9. (b), (d) and (e) (regarding conversion to excess baggage, prepayment of the cost and shipping entitlement not authorized when lump sum option is selected) also apply.

6. Transferring of records to administering offices - Education Grant Travel Record Card.

(a) Administering offices will use Education Grant Travel Record Cards (see Annex IV) to keep track of the education grant entitlement of eligible staff member's children. For serving staff members, an initial card is made available to the administering offices by OHR (in the first quarter of 1999). On assignment of newly appointed staff, OHR will also make available an education grant travel record card. Administering offices will record the travels approved/undertaken.

(b) The entitlement of children not included in the OHR records made available to administering offices (this refers to children who have started attendance at an educational institution outside of the home country in 1999 or thereafter) will be established upon:

- (i) OHR's confirmation that the child is a recognized dependant;
- (ii) evidence of enrollment submitted by the staff member to the administering office.

(c) On reassignment, the original of the education grant travel record cards for the period of the assignment are to be forwarded to the new duty station and a copy to UNDP/BPRM/OHR. On separation, the original must be forward to UNDP/BPRM/OHR. OHR will place these in the staff member's Official Status File. Copies of all records must be maintained at all duty stations for auditing purposes.

(d) These cards must be signed by the staff member: (i) on the initial transfer of the records by OHR to the administering offices; ii) by all concerned on a yearly basis; and (iii) on reassignment.

7. Request for education grant travel

(a) Staff members will submit to the administering office, the request for education grant travel, Annex IV-A (form EGTR/OHR/99 attached) for verification and approval of the entitlement. The staff member will be liable for the information provided related to the conditions of eligibility.

III - GUIDELINES APPLICABLE TO HOME LEAVE TRAVEL AND EDUCATION GRANT TRAVEL.

1. Point of reference for expenses to be borne by the Organization for travel and shipment

(a) Expenses borne by the Organization are those equivalent to: duty station/place of home leave/duty station **or** duty station/location traveled to/duty station, whichever is lower.

(b) For family residing at a country other than the duty station or the country of home leave, the point of reference for expenses to be borne by the Organization will also be the equivalent to place of home leave/duty station/place of home leave **or** location traveling from/location traveling to/location traveling from, whichever is lower.

(c) Travel of children must be based on the fare applicable to the age of children. In the case of parents traveling on education grant travel in lieu of the child, if the child is 12 years old (to whom a reduced fare applies) the difference in the cost between the adult fare and the child fare should be born by the staff member.

2. Travel authorization (PT.8)

A travel authorization (PT.8) should be issued for all travels; this is a pre-requisite for settling F.10s or verifying PT.165.

3. Lump Sum Option

(a). The lump sum option applies to home leave and education grant travel. (Refer to Manual for Operations Management (MOM) section 1.2.3). It represents 75% of the cost of full economy fare by the least costly carrier, subject to the cost limitations indicated above (III-1). When children under 12 are traveling, the cost must be based on the applicable fare.

(b) Once the lump sum is selected, the staff member and all members of the family must travel under this option. If the staff member combines home leave travel with **official mission**, the staff member must travel under the normal travel policy but the family can travel under the lump sum option. When home leave travel in conjunction with reassignment is undertaken, the staff member and the family must travel under the normal travel entitlement.

(c) A post facto request for lump sum is not authorized (if the staff member for any reason pre-paid the tickets and requests reimbursement).

(d) There is **no** entitlement to shipment or other travel expenses.

4. Handling of arrangements

The responsibilities in the handling of arrangements are detailed in Annex V.

5. Accounting Instructions

Account codes structure for country office's to debit expenses related to home leave and education grant travel entitlements are indicated in Annex VI.

6. International-Staff holding UNDP Letters of Appointment

International-Staff holding UNDP Letters of Appointment, administered under the 100 and 200 Series of the Staff Rules and Regulations refers to staff of: UNDP, UNOPS, UNFPA, UNCDF, UNCDP, UNIFEM, UNFSTD, UNFNRE, UNSO, UNV, IAPSO.

Staff administered by UNOPS must continue to address the request for home leave and education grant travel to UNOPS Headquarters.

7. Accountability

Heads of Offices are accountable for the proper application of rules, regulations and guidelines related to the home leave and education grant travel entitlement. Circular UNDP/ADM/93/50 of 16 August 1993, on the subject of accountability, refers.

8. Focal point for further information

(a) Any questions regarding the application of this delegation are to be addressed in the first instance to the administrative unit of the country office, or to the Personnel Unit of other locations away from UNDP Headquarters. Staff in New York continue to address questions related to these entitlement to their respective OHR Personnel Specialist.

(b) Additional guidance in the administration of these entitlements and on policy matters should be sought from the relevant Personnel Specialist of the Office of Human Resources, of UNDP.

(c) Information related to contractual status or further information related to accounts to be charged are to be addressed to the relevant Personnel Specialist in OHR.

**ANNEX I – SUMMARY OF MEASURES PREVIOUSLY ANNOUNCED AND RE-ENGINEERING MEASURES BEING INTRODUCED AT THIS TIME**

ISSUE	ANNOUNCED	PREVIOUS PROCEDURES	NEW PROCEDURES
Elimination of "Post Office" function for medical clearance.	UNDP/ADM/98/35 22 May 1998	Country Offices submitted medical examination results of locally-recruited staff to the UNDP OHR Administration Section for onward transmission to UN Medical Service.	Country Offices submit medical results directly to the UN Medical Services either by fax or pouch. Chest X-rays are no longer required to be forwarded to the UN Medical Service in New York, but a report from the radiologist must be submitted. The UN Medical Service faxes medical clearances directly to the Country Offices.
Representation Allowance.	UNDP/ADM/98/37 28 May 1998	Country Offices requested Headquarters' authorization to pay Representation Allowance to Resident Representatives a.i. or Officers-in-Charge of a UNDP Country Office, for periods exceeding 30 days.	Authority has been delegated to the heads of Country Offices to approve Representation Allowance for Resident Representatives a.i. or Officers-in-Charge. Delegation includes, for the first time, payment of Representation Allowance to locally-recruited staff when acting as Officer-in-Charge of a UNDP Country Office.
Reimbursement of costs for medical examinations.	UNDP/ADM/98/17 19 February 1998	Staff members submitted claims for reimbursement of costs for medical examinations on appointments to UNDP Headquarters for settlement, irrespective of where staff members were being assigned.	Claims for reimbursement of pre-placement medical examinations are settled by the respective country office to which a staff member is assigned, irrespective of where the medical examinations took place.
Extension beyond the age of mandatory separation.	UNDP/ADM/98/21 13 March 1998	UNDP Headquarters approved requests for extension of assignments beyond age 60 for staff recruited before 1 January 1990 and beyond age 62 for after that date.	Extension of up to 6 months beyond the age of mandatory separation for locally-recruited staff members in Country Offices is delegated to the heads of offices.
Elimination of OHR "post office" functions for Special Education Grant and Special Dependency Allowance (locally-recruited staff in country offices)	UNDP/ADM/98/68 16 October 1998	Country offices submitted requests for payment of Special Education Grant and Special Dependency Allowance for disabled children of locally-recruited staff members to the UNDP OHR Administration Section for onward transmission to the UN Medical Service. Periodic verification required by the Medical Service was also transmitted to the UN Medical Service through UNDP OHR Administration Section.	Country offices submit medical reports and requests for payment of Special Education Grant and/or Dependency Allowances for disabled children of locally-recruited staff members, including periodic verifications, directly to UN Medical Service. The UN Medical Service will fax approvals directly to the Country Offices. The turnaround time will be reduced by at least 2 weeks.

<p>Short-cuts in processing of F.10 claims to speed up the time for settlement of claims.</p>	<p>UNDP/ADM/98/68 16 October 1998</p>	<p>i. Vouchers for Reimbursement of Expenses (F.10 form) for staff member's travel on appointments, reassignments, home leave, separation, etc. were submitted to the Travel Services Unit (TSU) through UNDP OHR Administration Section, when travel authorization was raised at Headquarters.</p> <p>ii. When the Travel Authorization was raised at Headquarters on appointments, reassignments, home leave, separation, etc. but the staff member was being assigned to a country office, the F.10 had to be settled by Headquarters.</p>	<p>i. F.10 for staff members assigned to Headquarters on appointments, reassignments, home leave, separation, etc. will be submitted directly to TSU rather than through UNDP OHR Administration, when there has been no change in the original itinerary. Processing will be reduced by 2 week</p> <p>ii. When the Travel Authorization is raised at Headquarters on appointments, reassignments, home leave, separation, etc. but the staff member is being assigned to a country office, the F.10 will be settled directly by the country office instead of the claim being sent to Headquarters. TSU will send a faxed authorization including instructions about settling the claims to the country office. Country offices will IOV UNDP TSU quoting the Headquarters Travel Authorization with a copy of the settled F.10 claim. In both the above situations, staff members should ensure that proper documents are attached to the F.10 claims (e.g. boarding pass, receipt for airport tax, etc.)</p>
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**ANNEX I – SUMMARY OF MEASURES PREVIOUSLY ANNOUNCED AND RE-ENGINEERING MEASURES BEING INTRODUCED AT THIS TIME**

<b>ISSUE</b>	<b>ANNOUNCED</b>	<b>PREVIOUS PROCEDURES</b>	<b>NEW PROCEDURES</b>
<p>Universal "Point System" for Home Leave</p>	<p>Present Circular</p>	<p>i) A point system is used to determine the timing of home leave for staff serving in 12 month cycle duty stations (hardship classification C, D, and E). For 24 month home leave cycle locations and at Headquarters (hardship classification H, A and B), an even year/odd year system is used.</p> <p>ii) The maximum points accrual in the 12-month cycle duty station is 32.</p>	<p>i) A universal point system will be followed in all duty stations to determine entitlement and timing of home leave. The even/odd year for 24 month home leave cycle will no longer apply.</p> <p>ii) The maximum points accrual will be increased to 40.</p>
<p>Delegation of authority to verify and approve home leave and education grant travel:</p>	<p>Present Circular</p>	<p>The verification/approval of the entitlement to home leave and education grant travel was done by OHR; country offices were responsible for the travel arrangements and settlement of the F.10 or verification of the PT.165.</p>	<p>Effective 1 March 1999, the authorization to verify and approve these entitlements is being delegated to the Heads of Country Offices and locations away from UNDP Headquarters (Belgium, Bonn, Copenhagen, Geneva and Tokyo). Country Offices will also continue to make travel arrangements and settle F.10 travel claims.</p> <p>Home leave or education grant travel in conjunction with reassignment or other official travel will continue to be verified by OHR.</p>
<p>Transfer of home leave and education grant travel records to administering offices:</p>	<p>Present Circular</p>	<p>OHR maintained the individual records of international staff members in respect of home leave and education grant travel entitlement.</p>	<p>During the first quarter of 1999, OHR will transfer to administering offices individual records of international staff members in respect of home leave points accrued after the most recent home leave (for staff members assigned to 12 month home leave cycle duty stations) or on the next home leave (for staff assigned on 24 months home leave travel duty stations). Individual records in respect of the entitlement to education grant travel will also be transferred.</p>
<p>Delegation of authority for reimbursement of transportation costs of privately-owned automobiles</p>	<p>UNDP/ADM/98/73</p>	<p>HQ reimbursed partial costs of transportation of privately-owned automobiles to designated duty stations. Staff members submitted to OHR the F.10 claim form for reimbursement.</p>	<p>Effective 1 January 1999, country offices approve and effect the partial reimbursement of the costs of shipment of privately owned automobile to the designated duty stations, unless the staff member is being reassigned to another designated duty station, in which case reimbursement will be done in that next country.</p>

UNIVERSAL APPLICATION OF "POINTS SYSTEM"  
FOR HOME LEAVE ENTITLEMENT.

TRANSITION TO THE "POINTS SYSTEM"

UNDP/BPRM/OHR will prepare Home Leave Record Cards for all UNDP internationally-recruited staff members holding UNDP letters of appointment administered under the 100 and 200 Series of the Staff Rules and Regulations. These records will be transferred to the administering offices.

A "points system" is currently used to determine the timing of home leave for staff assigned to 12-month cycle duty stations (reaching 24 points) and as such there is already a point accrual reference and the Home Leave Record Cards will be prepared on the basis of the points accrual balance of the most recent home leave and/or as at December 1998.

In the case of home leave entitlement of staff assigned to 24-month cycle duty stations, the even year/odd year system has been used to determine the timing of home leave. The points system will start to apply as from the next home leave falling due on or after 1 January 1999, so as to give as much advance notice as possible about the change in procedures.

1. Staff assigned to 12-month Home Leave cycle duty stations

OHR will establish the Home Leave Record Card indicating the balance of points accrued as at the most recent home leave taken in 1998 (or to December 1998). The administering offices will record 2 points per month beginning in January 1999. (Those staff members who traveled on home leave before accruing 24 points may have a debit balance of points which must be off-set before adding points.)

2. Staff assigned to 24-month home leave cycle duty stations whose home leave under the even year/odd year system would normally take place in 1999.

The new system will start to apply as from the "next" home leave, so as to give as much advance notice to staff as possible about this procedural change.

(A) **1999 home leave entitlement taken in 1999:**

- (a) the monthly accrual of points begins from the month when home leave is taken in 1999;

**(B) 1999 home leave to be taken in year 2000:**

- (a) credit 12 points, corresponding to the 1999 entitlement;
- (b) the monthly accrual of points will begin from the month in 2000 when home leave is taken; (for instance, if taken in April 2000, there will be no accrual from January to March, and a total of 9 points will be accrued in 2000 for the period April to December).

**(C) 1999 home leave entitlement taken in 1998**

Debit as many points as the number of months that the 1999 home leave is advanced to 1998. Example: if 1999 Home Leave is advanced to October 1998, debit 3 points (Oct. to Dec.). Monthly accrual of points begins in January 1999. (Negative points above should be off-set first.)

3. Staff assigned to 24-month home leave cycle duty stations whose home leave under the even year/odd year system would normally take place in 2000.

- (a) accrual of points will begin in the month home leave is taken in year 2000;
- (b) if entitlement is taken in year 2001, the same approach as above 2 (B) will apply;
- (c) if entitlement is taken in 1999, the same approach as above 2 (C) will apply.

The entitlement to home leave becomes due when 24 points have been accrued. When home leave is taken 24 points are debited (although points continue to accrue during the period of home leave).

4. Dependants traveling separately from the staff member (at an earlier date)

The dependant's travel derives from the staff member's entitlement. Dependants may travel separately from the staff member provided that the entitlement exists (points accrual, period of service of the staff member upon return from his own home leave and validity of contract indicated in section 4 of the guidelines on "Conditions of Eligibility").

When dependants travel separately from the staff member, (at an **earlier** date) points accrual and points deduction when home leave is taken will apply from the month travel is undertaken by the dependants. The staff member may travel at a later date based on this entitlement, provided he meets the required months of service upon return from his home leave travel, with no further impact in the accounting of points.

5. International staff holding UNDP letters of appointment and administered by UNDP/BPRM/OHR refers to:

UNDP - UNOPS - UNFPA - UNCDP - UNCDF - UNIFEM - UNFSTD - UNRFNRE - UNSO - UNV - IAPSO.

Staff administered by UNOPS must continue to address the request for Home Leave (and Education Grant Travel) to UNOPS Headquarters.

EXAMPLE  
HOME LEAVE RECORD CARD

<b>Staff Member:</b> Index No. _____  Country and City of Home Leave: _____  Recognized Dependants: <table style="width:100%; border-collapse: collapse;"> <tr> <td style="width:30%;">Name</td> <td style="width:30%;">Family Relation</td> <td style="width:40%;">Date of Birth</td> </tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> </table>	Name	Family Relation	Date of Birth													<b>Reassigned staff:</b>  Previous duty station: _____ HL cycle: 24 (24 or 12) Present duty station: _____ HL cycle: 12 EOD (for newly appointed s/m) _____ Date of arrival (reassigned s/m): <b>18 April 2003</b>  <b>Duty Station reclassified:</b> From Hardship: h/l points: _____ To Hardship: h/l points: _____ Effective: _____
Name	Family Relation	Date of Birth														

Year	Duty Station	Home Leave Points		Total Points Accrued	Less: HL Taken (24 points) to be recorded in month HL taken (*)	Balance of Points	Home Leave Period		Country/City Home Leave travel
		24 months HL Cycle (1 point)	12 months HL Cycle (2 points)				(dates) S/M	(dates) Dependants	

24 - months home leave cycle duty station  
 Home leave due 2000  
 begin accrual of points in month home leave is taken  
 (signature of staff member)

From	To	No. Months	Points per Month	Points per Month					
Jan - Feb. no accrual	assuming: HL taken March 2000 (to Dec.)	10	1	10	10				
Jan 2001	Dec. 2001	12	1	12	22				
	HL taken Dec 2001				-24	-2			
Jan. 2002	Dec. 2002	12	1	12	10				
Jan 2003	March 2003	3	1	3	13				
Arrived 18 April	Reassigned: April	1	1	1	14				
May 2003	12-month HL cycle Sept. 2003	5		2	10	24			
	Home Leave taken Sept. 2003					-24	0		
Oct. 2003	Dec. 2003	3		2	6	6			
Jan/2004	Sept. 2004	9		2	18	24			

**Accounting instructions: (present duty station)**

Account Number: \_\_\_\_\_ IOV Title: \_\_\_\_\_

**Point carried over**

**To be completed on reassignment**

Verified: _____ (name and title)  Date: _____	Approved: _____ (name and title)  Date: _____	In agreement: _____ (staff member)  Date: _____
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Notes: 1. Attach copy of approved home leave requests.

EXAMPLE  
HOME LEAVE RECORD CARD

<b>Staff Member:</b> Index No. _____ Country and City of Home Leave: _____ Recognized Dependents: <table style="width:100%; border-collapse: collapse;"> <tr> <th style="width:30%;">Name</th> <th style="width:30%;">Family Relation</th> <th style="width:40%;">Date of Birth</th> </tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> </table>	Name	Family Relation	Date of Birth													<b>Reassigned staff:</b> Previous duty station: _____ HL cycle: 24 (24 or 12) Present duty station: _____ HL cycle: 12 EOD (for newly appointed s/m) _____ Date of arrival (reassigned s/m): 12 March 2003 <b>Duty Station reclassified:</b> From Hardship: _____ h/l points: To Hardship: _____ h/l points: Effective: _____
Name	Family Relation	Date of Birth														

Year	Duty Station	Home Leave Points		Total Points Accrued	Less: HL Taken (24 points) to be recorded in month HL taken (*)	Balance of Points	Home Leave Period		Country/City Home Leave travel
		24 months HL Cycle (1 point)	12 months HL Cycle (2 points)				(dates) S/M	(dates) Dependants	
24 – months home leave cycle duty station Home leave due in 1999 postponed to 2000 – – (a) credit 12 points for 1999 – (b) begin accrual in month home leave is taken in 2000 (signature of staff member)									
From	To	No. Months	Points per Month	Points per Month					
Jan – March no accrual	HL due 1999 taken in April 2000								
	1999 Credit					12			
April	Dec 2000	9	1	9		21			
	HL taken Dec. 2000					-24			
Jan. 2001	Dec. 2001	12	1	12		9			
Jan. 2002	Dec. 2002	12	1	12		21			
	March 2003 – HL/with Reassignment	3	1	3		24			
						-24			
Arrived 12 April 2003	Dec. 2003	9		2	18	18			
Jan 2004	March. 2004	3		2	6	24			
	HL taken in March 2004					-24			
<b>Accounting instructions: (present duty station)</b>						<b>Point carried over</b>			
Account Number: _____ IOV Title: _____								2	

**To be completed on reassignment**

Verified: _____ (name and title) Date: _____	Approved: _____ (name and title) Date: _____	In agreement: _____ (staff member) Date: _____
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Notes: 1. Attach copy of approved home leave requests.

Form: HLTR/OHR/99

**REQUEST FOR HOME LEAVE TRAVEL**

TO: \_\_\_\_\_ Date: \_\_\_\_\_

E.O.D. new arrivals)

FROM: \_\_\_\_\_

S/M's name and signature

Expiry date of appointment \_\_\_\_\_

Index: \_\_\_\_\_

(for staff on Fixed Term only)

Duty Station: \_\_\_\_\_

Permanent appointment Yes \_\_\_ No \_\_\_

Place of Home Leave: \_\_\_\_\_

H/L in conjunction with reassignment: Yes: No:

I hereby request authorization for me and my dependants to proceed on Home Leave travel as follows:

Travelers	Name	Children's Date of Birth	From			To:			Itinerary	
			Day	Month	Year	Day	Month	Year	From	To
Myself										
Spouse										
Dependent Children										

My contact address and

telephone number during home leave:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Lump Sum:** Yes: No

If Lump Sum is selected the whole family group should travel under this option and there is no entitlement to other travel expenses or shipment.

**LAST HOME LEAVE TAKEN**

Travelers	From			To:			Country traveled to
	Day	Month	Year	Day	Month	Year	(Staff member required to travel to home country on alternate trips)
Myself							
Spouse							
Dependent Children							

<b>To be completed by administering office</b>		Yes/No
Verification of Entitlement		Entitlement Verified: _____
No. of Points accrued as at month of proposed Home Leave:	<input type="checkbox"/>	(name and signature) _____
After verification of status of appointment, it is confirmed that S/M will meet the required months of service on return from home leave and/or beyond the date 24 points will be accrued: (Refer to Guidelines 1-4 (a) if there is a question regarding contractual status, UNDP/OHR must be contacted)	<input type="checkbox"/>	(title) _____ (date) _____
Dependant children traveling (SR 103.24)	<input type="checkbox"/>	Home Leave Approved: _____ (name and signature) _____
Under the age of 18, or between 18 and 21 years in full-time attendance at an educational institution	<input type="checkbox"/>	(title) _____ (date) _____

Failure to submit the F.10 or PT.165 form with the required documentation within two months after completion of travel will result in automatic recovery of the costs of home leave travel or lump sum funds from the staff member's salary.





EGTR/OHR/99

## REQUEST FOR EDUCATION GRANT TRAVEL

<b>LUMP SUM</b>
<input type="checkbox"/> YES <input type="checkbox"/> NO

<b>STAFF MEMBER:</b> (Last Name)	(First)	(M.I.)	INDEX NO.:	EXPIRY DATE OF APPOINTMENT:
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	CHILD #1	CHILD #2	CHILD #3
Child's Name:			
Child's Date of Birth:			
Name of School or Univ. attended:			
Location of School (City/Country):			
School Year begins: (d/m/y)			
ends on: (d/m/y)			
Child's attending School from: (d/m/y)			
to: (d/m/y)			
Child's travel requested From (place):			
To (place):			
Intended departure date (d/m/y):			
Intended return date (d/m/y):			
Date of child's last ed. grant travel:			
If Parent travel requested (in lieu of Child's Name of parent visiting the child(ren):			

Staff member's last home leave Travel (dates):	From (d/m/y): To (d/m/y):	Staff member's last travel to Visit dependents (dates):	From: To:
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I attest that the child(dren) is (are) in full-time attendance at an educational institution away from the duty station, for which an education grant claim is being submitted. I further undertake that if the conditions regarding eligibility for education grant travel are not met, the cost of travel may be recovered from my salary.

\_\_\_\_\_  
(Signature of staff member)

\_\_\_\_\_  
(Date)

Country Office VERIFICATION:

APPROVAL:

\_\_\_\_\_  
(Signature, Name and Title)

\_\_\_\_\_  
(Signature, Name and Title)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Date)

Headquarters certification of entitlement:

Name of Child	Authorized traveller (name of child or parent)	Authorized place of travel		Approximate dates	
		From	To	From	To

## HANDLING OF ARRANGEMENTS

### Home Leave Travel and Education Grant Travel

Delegation to country offices and locations away from UNDP Headquarters to verify/approve the entitlements, issue the travel authorizations, effect travel arrangements, settle the F.10 and/or verify the PT.165

(a) At least five weeks prior to planned travel (or as established by the administering office), the staff member must submit to the designated staff the attached form HLTR/OHR/99 for home leave travel or EGTR/OHR/99 for education grant travel, for **verification** of the entitlement.. (Form HLTR/OHR/99 replaces form HL 95-3; form EGTR/OHR/99 replaces form DOP/EGT-5/94)

(b) after the entitlement is verified, the form should be submitted to the Head of the Office for **approval**; the travel authorization (PT.8) will be issued and the original given to the staff member;

(d) on completion of travel, the staff member must submit to the administering office, for settlement, the F.10 with supporting documents and a copy of the travel authorization, or PT.165 with supporting documents if the lump sum option was selected.

OHR/Administration will continue to authorize home leave and/or education grant travel in conjunction with reassignment or other official travel

(1) The following arrangements will apply **when split shipment** of the entitlement on reassignment is **not required**.

(a) The request for home leave travel (HLTR/OHR/99) or education grant travel (EGTR/OHR/99) verified and approved must be forwarded to the relevant Personnel Specialist of UNDP/BPRM/OHR.

(b) UNDP/BPRM/OHR will communicate the approval to the administering offices and provide instructions on the reassignment entitlements and travel itinerary. The administering offices will issue the travel authorization, and provide a copy to the staff member;

(c) On completion of travel, the staff member must submit the F.10 with supporting documents and copy of the travel authorization to the **new** duty station for settlement.

2. The following arrangements will apply **when split shipment** of the entitlement on reassignment **is required**.

**Travel authorization to be issued by UNDP/OHR/Administration**

(a) a copy of the request for home leave (HLTR/OHR/99) or education grant travel (EGTR/OHR/99) verified and approved should be submitted to the Personnel Specialist of UNDP/BPRM/OHR, together with the request for split shipment;

(b) OHR will issue the travel authorization, submit it to the Travel Services Unit and copy it to the staff member and to the administering office;

(c) Travel Services Unit will communicate the repatriation shipment entitlement and travel itinerary to the administering office to effect the travel and shipping arrangements;

(d) on completion of travel, the staff member must submit the F.10 with supporting documents and copy of the travel authorization to the **new** duty station for settlement.

Additional instructions:

1. When travel is undertaken to a country other than the place of home leave, the TA must indicate maximum entitlement, (i.e. duty station/place of home leave/ duty station), the route requested by the staff member and whether the lump sum option has been selected, with a notation to the effect that **“additional cost, if any, will be paid by the staff member to the travel agency; any savings will accrue to UNDP.”**

2. On education grant travel of children under 12, the cost to be borne by the Organization refers to that applicable to the age of the child. When a parent travels in lieu of the child, the additional cost for conversion to adult fare must be borne by the staff member.

3. Failure to submit the F.10 or PT.165 form with the required documentation within two months after completion of travel will result in automatic recovery of the costs of home leave travel or lump sum funds from the staff member's salary.

4. Education grant travel is authorized on the condition that the F.10 claim or PT.165 form for the previous travel has been submitted.

5. Time absent on home leave should be charged to annual leave, after taking into account the appropriate travel time.

## ACCOUNT CODE STRUCTURE HOME LEAVE AND EDUCATION GRANT TRAVEL

		Home Leave - 141	Education Grant - 131	IOV Title
<b>(a) Object of expenditure:</b>				
UNDP	Core:	2DA-4-cty-(a)		UNDP-BUDGET
	Extra-Budgetary: (X-B)	2DE-4-cty-(a)		UNDP-BUDGET
	XB-Security Officers	2DC-4-cty-(a)		UNDP-BUDGET
	XB Special Emergency Operations:	2DY-4-cty-(a)		UNDP-BUDGET
	JPO's	3JP-0000-SSS-00-SEQ-0000-(a) SSS=sponsoring government SEQ = sequential number of JPO (refer to other authorizations in respect of individual JPO).		UNDP-OTHER
		3AJ-0000-CAN-00-SEQ-0000-(a) Sponsored by CANADA assigned to UNFPA		
UNOPS	Core Staff Country Projects	2KY-4-cty-(a) 2KX-1-RGN-(a) 3F*-0600-cty-yr-number-110x-(a) 3H*-0600-cty-yr-number-110x-(a) 3K*-0600-cty-yr-number-110x-(a)		OPS
UNCDP	Project Staff	3DT-1000-(project number)-110x-(a)		UNCDP
UNCDF	Core Staff Project staff	2CY-4-cty-(a) 3CR-0000-(project number)-110x-(a)		UNCDF
UNIFEM	Project staff	3WC-077-(project number)11xx-(a)		UNDP-OTHER
UNFPA	Core staff Project staff	2AG-4-cty-(a) 3AN-0010-(project number)11xx-(a)		UNFPA
UNFSTD	Project staff	3TP-0000-(project number)-11xx-(a)		UNFSTD
UNRFNRE	Project staff	3RF-0000(project number)-11xx-(a)		UNRFNRE
UNSO	Admin. Budget	2SF-4-cty-(a) 2SY-4-cty-(a) 2SZ-4-cty-(a)		UNSO

**Notes:**

- (1) The account code structure for JPOs can be taken from the authorization for training-related expenses. The JPO Unit at UNDP/OHR can be contacted for further information.
- (2) UNOPS - the asterisk which follows 3F, 3H and 3K refers to different sources/funding activities. Consult the staff/member's file and/or UNOPS
- (3) To ensure that the expenditure is properly classified and coded, please refer to the Account Codes Handbok, Table 2.