



UNITED NATIONS

*Administrative Rules
of the United Nations
Joint Staff Pension Fund*

January 1963

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^{1/} These Administrative Rules were adopted by the United Nations Joint Staff Pension Board at its eighth session on 17 April 1957, and amended by the United Nations Joint Staff Pension Board at its ninth session on 12 September 1958, at its tenth session on 27 July 1960, and at its eleventh session on 4 May 1962. The present text went into effect on 4 May 1962, except for Rules D.12 to D.19 and the chart which accompanies Rule E.1, which became effective on 1 January 1963.

Section A. Definitions

For the purpose of these Administrative Rules:

A.1

- (a) "Board" means the United Nations Joint Staff Pension Board;
- (b) "Fund" means the United Nations Joint Staff Pension Fund;
- (c) "Regulations" means the Regulations of the Fund;
- (d) "Committee" means a Staff Pension Committee of a member organization;
- (e) "Competent authority" means the executive head of a member organization, or a person duly designated by him for the purpose of these rules;
- (f) "Medical standards" means the medical standards adopted by the Board.

Section B. Participation in the Fund

Admission of a new participant or associate participant

The competent authority of each organization shall notify to the Secretary of the Staff Pension Committee concerned each staff member who becomes entitled to participate in the Fund.

B.1

Admission of participants and associate participants to the Fund shall be recorded by the Committee concerned.

B.2

As part of the procedure for recording admission to the Fund, each participant and associate participant shall:

B.3

(a) Complete in duplicate on a form drawn up for the purpose a declaration indicating his family status and, in the case of a participant, the name or names of the recipient or recipients designated for the purposes of articles VII ter and X.6 (d) of the Regulations; and

(b) Submit proof of the information given in the aforesaid declaration, in particular, proof of his date of birth and, where appropriate, of his marriage and the date of birth of his wife and children.

One copy of the participant's or associate participant's declaration shall be kept by the Secretary of the Committee concerned and shall be attached to any application for a benefit transmitted to the Secretary of the Board. The other copy shall be certified as received and returned to the participant or associate participant.

B.4

The Fund shall be entitled to rely on the accuracy of the information given by each participant or associate participant and no financial liability shall be incurred by the Fund in consequence of any action taken in reliance upon that information.

B.5

- B.6** The Secretary of each Committee shall notify each month to the Secretary of the Board particulars of the participants and associate participants admitted to the Fund during the month, including their family status and such changes as may have occurred in the family status of previously admitted participants and associate participants. Each participant and associate participant shall similarly report any alterations in these particulars (marriage, death of wife, divorce, remarriage, birth of children, or death of children).
- B.7** The Secretary of the Board shall report at each regular session of the Board on admissions to the Fund.
- B.8** At the earliest possible date each participant and associate participant shall be medically classified in compliance with article IX as follows:
- Class 1*, without any significant physical or mental defect which might involve increased risk as to death or long-term disability.
- Class 2*, with a correctable defect which involves increased risk as to death or long-term disability.
- Class 3*, with a defect which cannot be corrected and involves increased risk as to death or long-term disability.
- B.9** A participant or associate participant classified in Class I shall be covered immediately by the provisions of articles V, VII.1, VII.6 and VII bis 1.
- B.10** A participant or associate participant classified in Class 3 shall be entitled to the benefits provided under articles V, VII.1, VII.6 and VII bis 1, only after he has completed five years of contributory service.
- B.11** A participant or associate participant classified in Class 2 shall be entitled to the benefits provided under articles V, VII.1, VII.6 and VII bis 1, only after he has completed five years of contributory service, or earlier if his defect has been satisfactorily corrected and he is reclassified to Class 1.
- B.12** When recommending classification in Class 2 the medical officer shall inform the Committee of the time at which re-examination has been recommended to the participant or associate participant.
- B.13** In each case the Committee shall assign a medical classification upon the recommendation of the medical officer of the organization. All decisions regarding medical classifications shall be communicated immediately to the participant or associate participant and to the Secretary of the Board.
- B.14** The recommendation of the organization's medical officer shall be made in conformity with the medical standards adopted by the Board and on the basis of a medical examination by the said medical officer or by a medical practitioner selected by him.
- B.15** The medical officer may base his recommendation on a medical examination made by a member organization prior to the admission of a staff member into the Fund, provided that such examination was carried out not more than twelve months previously.

Before presenting his recommendation to the Committee, the medical officer shall inform the participant or associate participant concerned whenever he is recommending his classification in Class 2 or Class 3. The participant or associate participant may request the medical officer in writing to communicate to the Committee such detailed medical information as may be necessary for a full consideration of his classification. **B.16**

A participant or associate participant who refuses to undergo the required medical examination shall not be covered by the provisions of articles V, VII.1, VII.6 and VII bis 1 until he has completed five years of contributory service. He may, however, undergo the medical examination and may then be classified. **B.17**

A participant or associate participant classified in Class 2 or Class 3 may lodge an appeal, not later than one month after he has been notified of the decision, in accordance with the conditions specified under section G. **B.18**

Validation by a participant of non-pensionable service

Applications for the validation of non-pensionable service made under article III shall be addressed to the Secretary of the Committee of the organization to which the participant then belongs, and must be made not later than one year after the date of admission to the Fund as a participant. The participant must specify the period of his service which he wishes to have validated. **B.19**

A request for validation under article III may be accepted only after the competent authority of the member organization or organizations concerned has certified that the conditions of article III have been met. **B.20**

Before making payment under article III, a participant shall select one of the following methods: **B.21**

(a) In a lump sum, payable upon notification of the amount due;

(b) In equal monthly instalments, payable within a period no longer than that of the previously non-pensionable service which the participant is validating and in any case prior to age sixty, such period commencing at the date when the participant is notified of the amount payable; and

(c) Partially in a lump sum as in (a) above, with the balance payable in equal monthly instalments, as in (b) above.

In computing such instalment payments, compound interest shall be added as provided in article III and as specified in rule F.15.

The member organization which employed the participant during the period of service which he has elected to validate under article III shall be responsible for the payments due from the organization under that article. **B.22**

Member organizations shall make payments under article III by one of the following methods: **B.23**

(a) In the same form and twice the amount of the payment made by the participant, or

(b) In a single payment of twice the amount the participant would have paid under rule B.21 (a) above.

- B.24** In the event that payments under (b) or (c) of rule B.21 are discontinued or not completed for any reason, the participant shall be given notice of his default in payments and, if the payments in default are not paid within the period specified in the notice, the participant's rights to further validation of that period shall be cancelled. In that case the participant shall be credited with contributory service to the extent to which he has made payments under rule B.21 above.

Re-employment

- B.25** A participant or associate participant who, having ceased to participate in the Fund, is readmitted to the Fund, shall have his medical classification redetermined in accordance with the procedure specified in rule B.8.
- B.26** However, a participant formerly classified in Class 1, whose contributory service credit is restored under article XII, shall be re-assigned his previous medical classification without a new medical examination provided that:
- (a) His contributory service has not been interrupted for more than one year, or
 - (b) His previous contributory service amounted to five years or more and the break in service did not exceed three years.
- B.27** If a participant or associate participant who had ceased to participate in the Fund by the receipt of a disability benefit is readmitted to the Fund upon the discontinuance of the disability benefit, his former classification shall be confirmed without a new medical examination.
- B.28** If a former participant is re-employed and undertakes to restore his prior contributory service credit in conformity with the provisions of article XII, he shall so inform the Secretary of the Pension Committee of the organization to which he belongs. The Secretary concerned shall notify the Secretary of the Board.
- B.29** The Secretary of the Board shall calculate the amount payable under article XII and shall notify the amount so calculated to the Secretary of the Committee.
- B.30** Before repaying the amount due under article XII, a participant shall select one of the following methods:
- (a) In a lump sum, payable upon notification of the amount due;
 - (b) In equal monthly instalments, payable within a period no longer than that of the previous contributory service on which the benefit received was based and in any case prior to age sixty, such period commencing at the date when the participant is notified of the amount payable; and
 - (c) Partially in a lump sum, as in (a) above, with the balance payable in equal monthly instalments, as in (b) above.

In computing such instalment payments, further compound interest shall be added as provided by article XII and as specified in rule F.15.

In the event that payments are not completed under (b) or (c) of rule B.30 or that the participant ceases to be a participant before he has completed such payments, the sums already paid plus interest shall be refunded to the participant. **B.31**

Transfer from one member organization to another

If a participant or associate participant is transferred from one member organization to another, the following procedure shall be observed: **B.32**

(a) The Secretary of the Committee of the releasing organization shall advise the Secretary of the Board that the transfer has taken place; he shall give the name and active number of the participant or associate participant transferred and the organization to which the transfer has been made;

(b) The Secretary of the Committee of the releasing organization shall forward without delay to the Secretary of the Committee of the receiving organization:

(i) The complete history record of the participant or associate participant, up to the effective date of his transfer, including his latest family status and his pensionable remuneration and contributions paid in the current financial year;

(ii) His latest designation of recipients for the purposes of articles VII ter and X.6 (d);

(iii) A statement of all vital dates verified; and

(iv) Any other documentation having an important bearing on his status or his prospective entitlement under the Regulations, including particulars concerning validation of service in progress under article III, or restoration of prior contributory service credit under article XII, or voluntary deposits under article XVIII.

Section C. Voluntary deposits by participants

Applications to make voluntary deposits under article XVIII shall be submitted to the Secretary of the Board through the Secretary of the Committee of the organization to which the participant belongs. The Secretary of the Committee concerned shall communicate to the Secretary of the Board whatever particulars are necessary for the consideration of the application. The Board may delegate to its Secretary the authority to approve applications to make voluntary deposits, provided that a report shall be made to the Standing Committee. **C.1**

The maximum amount of the voluntary deposit to be made by a participant shall be determined in such a way that the amount of the increased retirement benefit to which he would become entitled upon retirement when he reached the age of sixty or a later age shall not exceed 60 per cent of the final average remuneration. If a male par- **C.2**

participant is married at the time of his request, his maximum amount includes provision for a life annuity with survivorship.

- C.3 For this purpose, the final average remuneration shall be calculated at the date of the request on the basis of the current salary together with the within-grade increments for which the participant may qualify.
- C.4 Deposits by a participant under article XVIII shall be made as follows:
 - (a) By one or more lump-sum payments; and/or
 - (b) By additional contributions, the amount of which shall not be subject to change more than once during each year.
- C.5 Voluntary deposits made by a participant under the provisions of article XVIII shall bear compound interest as provided in article XXIX.
- C.6 The additional benefit in case of withdrawal when the regular benefit is taken in a lump sum, or when a death benefit is payable under article VII ter shall be the amount of the voluntary deposit paid together with compound interest calculated to the date of separation.

Section D. Granting, calculation and payment of benefits

Granting of benefits

- D.1 By virtue of article XXIV (b), the Board delegates to each Staff Pension Committee its discretionary powers relating to the granting of benefits. In any case, a Staff Pension Committee may not grant, reject, suspend or discontinue a disability or widower benefit except by unanimous vote.
- D.2 Whenever a unanimous decision has not been reached concerning a disability benefit or whenever the Secretary of the Joint Staff Pension Board has not certified a benefit in accordance with the provisions of article XXIII, the case shall be referred to the Joint Staff Pension Board or its Standing Committee for decision.

Calculation of all benefits

- D.3 In determining whether a participant has performed the five years of contributory service necessary to be eligible for a withdrawal settlement under article X.3, or in determining final average remuneration in case of death or disability with less than five years of contributory service, the calculation shall take into account the actual number of years, months and days of such contributory service.
- D.4 For all other purposes, contributory service shall be calculated only in years and months. Each month of contributory service shall be deemed to equal one-twelfth of a year.
- D.5 When less than full calendar months are involved, the days shall be accumulated and converted to months in accordance with the following rules:
 - (a) During one or more periods of contributory service, odd days at the beginning and end of each period shall be added together, and

(b) The days shall be converted to months as follows:

(i) One month shall be counted for each thirty days, and

(ii) One month shall be counted for any residue of fifteen days or more, no regard being taken of a shorter period.

Payment of salary in lieu of notice shall be considered as pensionable remuneration and the period counted as contributory service. However, such a period shall be excluded from contributory service credit upon the request of the person concerned provided that the request is received prior to the certification of the benefit. D.6

Compensation in payment of accrued leave shall not be considered as pensionable remuneration and the period shall not be counted as contributory service. D.7

The age of a participant or associate participant is calculated as the number of years and months from the date of his birth to the date of his separation. In accumulating periods of less than full months at the beginning and end of the age period, the days are added together and fifteen days or more shall be considered as a month, no regard being taken of a shorter period. D.8

Notwithstanding the provisions of rule D.8 and without prejudice to the application of article XVI.5 (a), a participant shall be deemed to have reached the age of sixty when his contributory service included the day of his sixtieth birthday. D.9

Whenever calculation of interest is required in order to determine a benefit, the calculations shall be made according to rules F.12, F.13 and F.14. D.10

Provision particular to child's benefits

For the purpose of article VIII, paragraph 4, a dependent child is considered to be one who is receiving continuing support from the participant. Entitlement to a dependency allowance under the Staff Regulations and Rules of the member organization is acceptable evidence of continuing support. D.11

Provisions particular to disability benefits

The competent authority of a member organization shall notify the Secretary of the Staff Pension Committee of that organization when a participant or associate participant should be considered for a disability benefit, furnish the necessary information, and arrange for the submission of such medical evidence as the Committee may request. D.12

A disability benefit is payable as from the day following that upon which the participant or associate participant has exhausted all sick or special leave, whether on full or on half pay, available to him under the Staff Regulations and Rules applicable to him. D.13

When the employment of a participant or associate participant is terminated for reasons other than incapacity, for reasons of health, for further service, and he claims a disability benefit, the Staff D.14

Pension Committee must be satisfied that at the date of separation, he was so incapacitated. Any such claim shall be submitted not later than four months after the date of separation, provided that in exceptional circumstances the Committee may accept for consideration a claim made at a later date. If such a claim is upheld and a disability benefit is granted, any withdrawal settlement previously paid shall be recovered.

- D.15 At the time when a disability benefit is granted or reviewed, the Committee, on the recommendation of the medical officer, shall give directions regarding the date of the next medical examination. A participant or associate participant who is granted a disability benefit shall not be required to undergo further medical review after his fifty-fifth birthday, unless evidence indicating that he has ceased to be disabled becomes available to the Committee, which may then decide to require a special examination and to reconsider his eligibility for a disability benefit.
- D.16 Suspension or discontinuance of a disability benefit under article VI.4 or VI.6 shall be effective at the end of the third month from the date of notification of the Staff Pension Committee's decision to suspend or discontinue, or upon re-employment, if earlier.

Certification and payment of benefits

- D.17 A participant entitled to a benefit shall submit his payment instructions in writing to the Secretary of the Staff Pension Committee, who shall notify the Secretary of the Board accordingly.
- D.18 The Secretary of each Staff Pension Committee shall notify the Secretary of the Board of all benefits granted by the Staff Pension Committee and supply all relevant information concerning the benefit, including the date of the participant's last day of contributory service. For all benefit cases involving a medical question, the medical officer shall transmit a report to the medical consultant of the Board.
- D.19 Payment of all benefits shall be certified by the Secretary of the Board who shall ensure that the decision granting the benefit conforms to the Regulations and Administrative Rules of the Fund, that the calculations are correct and that the payment is being made to the proper recipient.
- D.20 The payment of withdrawal settlements to participants shall be made only after the last day of contributory service and after such date has been notified to the Secretary of the Board as provided under rule D.18 above.
- D.21 A benefit payable otherwise than in a lump sum shall be paid monthly in advance on the first day of each calendar month, or at the request of the recipient, shall be paid quarterly or half-yearly in arrear without interest on the arrears.
- D.22 The Secretary of the Board shall at intervals of not more than twelve months require evidence that the beneficiary is alive or that the widow of a participant or associate participant has not remarried.

Section E. Administrative organs of the Fund

Joint Staff Pension Board

(a) In accordance with article XXII, the Joint Staff Pension Board shall be composed as indicated in the chart on page 10. E.1

(b) The Board shall meet in regular session not less frequently than once in every two years at a time and place to be decided by the Board or its Standing Committee.

Before each regular session of the Board, the Secretaries of the Staff Pension Committees shall notify to the Secretary of the Board the names of the persons appointed by the Staff Pension Committees as members of the Board in accordance with article XXII,1 and the names of persons appointed by the Staff Pension Committees as alternates. Those members shall remain accredited until the next regular session of the Board unless the Secretary of the Board is notified that a Staff Pension Committee has made a change in its representation. E.2

Special sessions of the Board shall be held upon the decision of either the Chairman of the Board or the Standing Committee or on the request of at least seven members of the Board. The time and place of a special session shall be decided by the Standing Committee. E.3

All sessions of the Board shall be convened by the Secretary in accordance with the instructions of the Standing Committee. Items which are proposed by any member of the Board or by any Staff Pension Committee, at least one month before the beginning of a regular session or fourteen days before the beginning of a special session, shall be placed by the Secretary on the provisional agenda and communicated to each member of the Board and to the Secretaries of the Staff Pension Committees accompanied by the necessary documentation. Other items may be added to the agenda either at the beginning of a session or during a session if the Board so decides. E.4

Subject to the provisions of the Regulations and of these Rules, the Board shall adopt its own procedures. A majority of the members entitled to be present at the Board shall constitute a quorum, provided that not less than two members from each of the three following groups are present: E.5

(a) The representatives of the General Assembly of the United Nations and the corresponding bodies of the other member organizations;

(b) The representatives of the competent authorities of member organizations;

(c) The representatives of the participants.

Decisions of the Board shall be taken by a majority of the members present and voting. E.6

At the opening of each regular session, the Board shall elect a chairman and two vice-chairmen who shall preside at the meetings of the Board until their successors are elected. E.7

I	United Nations 6 members	2 from members of the United Nations Staff Pension Committee elected by the General Assembly 2 from members of the United Nations Staff Pension Committee appointed by the Secretary-General 2 from members of the United Nations Staff Pension Committee elected by participants
II	ILO. 2 members WHO. 2 members FAO 2 members UNESCO 2 members ICAO. 2 members IAEA. 2 members	4 from members of Staff Pension Committees elected by the bodies corresponding to the General Assembly of the United Nations 4 from members of Staff Pension Committees appointed by the Chief Executive Officers of the specialized agencies 4 from members of Staff Pension Committees elected by participants
III	WMO. 1 member IMCO 1 member ITU. 1 member	1 from members of Staff Pension Committees elected by the bodies corresponding to the General Assembly of the United Nations 1 from members of Staff Pension Committees appointed by the Chief Executive Officers of the specialized agencies 1 from members of Staff Pension Committees elected by participants

For each specialized agency or group of specialized agencies listed in the table above, the following groups shall be represented during the years indicated below:

	1964-1966	1966-1968	1968-1970	1970-1972
ILO.	DG-P	GB-DG	GB-P	DG-P
WHO.	GB-P	DG-P	GB-DG	GB-P
FAO	DG-P	GB-DG	GB-P	DG-P
UNESCO	GB-P	DG-P	GB-DG	GB-P
ICAO.	GB-DG	GB-P	DG-P	GB-DG
IAEA.	GB-DG	GB-P	DG-P	GB-DG
WMO.	GB	DG	P	GB
IMCO	DG	P	GB	DG
ITU.	P	GB	DG	P

GB = Governing Body

DG = Director-General

P = Participants

Summary records of all meetings of the Board and its Standing Committee shall be prepared under the responsibility of the Secretary and distributed as soon as possible to all members of the Board and the Standing Committee as well as the Chairman and Secretaries of the Staff Pension Committees. E.8

Local Staff Pension Committees shall have the right to be represented by observers at all sessions of the Joint Staff Pension Board. Each Committee may be so represented by no more than two such observers who shall not have the right to vote in the Board, Observers shall have the right to speak with the permission of the Chairman. E.9

Standing Committee

At each regular session the Board shall appoint a Standing Committee composed of nine members and nine alternates elected from the members and alternates of the Board or of Staff Pension Committees. The representational distribution shall be as follows (see chart on page 12). E.10

Whenever between sessions of the Board a member or alternate member of the Standing Committee resigns or ceases to be a member of a Staff Pension Committee another member or alternate shall be appointed by the Staff Pension Committee to which the former member or alternate belonged, to serve till the next session of the Board. E.11

At its first session following the regular session of the Joint Staff Pension Board, the Standing Committee shall elect a chairman and a vice-chairman. E.12

The Standing Committee shall, on behalf of the Board, decide individual cases referred to it and exercise a general control on the operations of the Fund. It shall perform such additional specific functions as may from time to time be assigned to it by the Board. At the request of the Board or of any Staff Pension Committee, the Standing Committee shall initiate preparatory work on any policy question to the end that such question be effectively considered by the Board at its next session. E.13

The Standing Committee shall submit a report to each regular session of the Board on action taken by the Committee since the previous regular session of the Board. E.14

Meetings of the Standing Committee are convened by the Secretary upon the instructions of the Chairman. A meeting shall be held where a benefit is referred to the Standing Committee for decision by a Staff Pension Committee or by the Secretary in accordance with rule D.2 or at the request of three members. E.15

Five members shall constitute a quorum, provided that the three groups comprising a Staff Pension Committee under the provisions of articles XX and XXI are represented. Decisions of the Standing Committee shall be taken by a majority of the members present and voting. E.16

The records and all correspondence of the Standing Committee shall be private and kept in the care of the Secretary of the Board. E.17

I	United Nations 3 members	1 from members of the United Nations Staff Pension Committee elected by the General Assembly 1 from members of the United Nations Staff Pension Committee appointed by the Secretary-General 1 from members of the United Nations Staff Pension Committee elected by participants
II	ILO 1 member WHO 1 member WMO, IAEA, IMCO, ITU 1 member	1 from members of Staff Pension Committees elected by the bodies corresponding to the General Assembly of the United Nations 1 from members of Staff Pension Committees appointed by the Chief Executive Officers of the specialized agencies 1 from members of Staff Pension Committees elected by participants
III	FAO 1 member UNESCO 1 member ICAO 1 member	1 from members of Staff Pension Committees elected by the bodies corresponding to the General Assembly of the United Nations 1 from members of Staff Pension Committees appointed by the Chief Executive Officers of the specialized agencies 1 from members of staff pension committees elected by participants

For each specialized agency or group of specialized agencies listed in the table above, the following groups shall be represented during the years indicated below:

	1962-1964	1964-1966	1966-1968	1968-1970
ILO	GB	P	DG	GB
WHO	DG	GB	P	DG
WMO, IAEA, IMCO, ITU	P	DG	GB	P
FAO	GB	P	DG	GB
UNESCO	DG	GB	P	DG
ICAO	P	DG	GB	P

GB = Governing Body

DG = Director-General

P = Participants

Medical Consultant

The Board shall appoint a medical consultant, who shall assist the Board in all medical questions. E.18

In order to ensure the uniform application of the medical standards adopted by the Board, the medical consultant and the medical officers of the member organizations shall maintain a continuous and regular contact. The medical officers of the member organizations may be invited by the medical consultant to furnish information on the manner in which the medical standards are being applied by them and, when requested, shall furnish to the medical consultant the relevant medical information as determined by the medical consultant. E.19

The medical consultant shall report to each regular session of the Board, submitting a comprehensive statement on the medical classification of participants and on medical information affecting the granting of benefits from the Fund. E.20

Staff Pension Committees

The composition of the Staff Pension Committee of each member organization shall be in accordance with the provisions of articles XX and XXI. Each Committee shall hold at least one regular meeting each year. Special meetings shall be held either at the decision of the Chairman, at the request of the competent authority, or at the request in writing of three members. The Board or its Standing Committee may refer a matter to a Staff Pension Committee and request a special meeting. In that case, the Board or its Standing Committee is entitled to be represented at this meeting. E.21

A majority of the members entitled to be present shall constitute a quorum, provided that the three groups comprising the Committee under the provisions of articles XX and XXI are represented. Subject to rule D.1, decisions of the Committees shall be taken by a majority of the members present and voting. E.22

Each Committee shall elect a chairman at its first regular session of each year. E.23

Each Committee may appoint a Standing Committee to transact current business when the Committee is not in session. Each of the three groups comprising the Committee shall be represented on the Standing Committee. Any action taken by the Standing Committee shall be reported to the Committee at its following session. E.24

Summary records of all meetings of the Committee and its Standing Committee shall be prepared under the responsibility of the Secretary, approved by the members participating and distributed as soon as possible to all members of the Committee and to the Secretary of the Board. E.25

Subject to the provisions of the Regulations and these Rules, each Committee shall regulate its own procedures. E.26

Secretaries of Staff Pension Committees

Upon the recommendation of each Committee, the competent authority of each member organization shall appoint a Secretary and may appoint a Deputy-Secretary to the Committee. E.27

- E.28 The records and all correspondence of the Committee shall be private and kept in the care of the Secretary of the Committee.
- E.29 Communications between participants and the Secretary of the Board shall normally be made through the Secretaries of Committees. Nevertheless in special circumstances any participant may communicate directly with the Secretary of the Board, who shall inform whenever appropriate the Secretary of the Committee.
- E.30 Each committee may delegate to its Secretary, subject to such procedure for supervision and reporting as the Committee may consider appropriate, the power of approving on its behalf all straightforward individual cases, including the recording of admissions to the Fund, medical classifications and all benefits of the Fund except disability and widower benefits.

Section F. Administrative and financial procedures

Administrative expenses

- F.1 Estimates of the administrative expenses of the Joint Staff Pension Board shall be approved by the Board before submission to the General Assembly.

Investments

- F.2 The Secretary shall present to the Board at each regular session a report indicating the status of all investments including a yield and maturity analysis.

General financial procedures

- F.3 The financial year shall begin on 1 October and end on 30 September.
- F.4 Each member organization shall maintain an individual record for each of its employees participating in the Fund on which shall be recorded all contributions made by the participants, the rates of pensionable remuneration applicable during the year and the contributory service for which contributions have been paid.
- F.5 Each member organization shall forward to the Secretary of the Board within fourteen days after the end of each calendar month a statement showing:
- (a) Total contributions deducted from the salaries of participants during that month payable under articles XVI.1 and XVI.2;
 - (b) Total contributions payable by the member organization under articles II bis and XVII;
 - (c) Other contributions by individual participants or by the member organization payable under articles III, XII, XVI.7 and XVIII. A cheque covering the payments under (a), (b) and (c) above shall accompany this statement.
- F.6 Each member organization shall furnish to the Fund within forty-five days after 30 September of each year (on forms and under procedures prescribed from time to time by the Standing Committee or the Secretary of the Board on its behalf) a year-end list of all those

who have been participants during any part of that year, showing total pensionable remuneration earned, total contributions made by each participant during the year, and period of contributory service covered. Changes in pensionable remuneration with effective dates shall also be reported by the member organization for each participant.

For all participants who separated from the Fund during the year, there should be reported on the year-end list the exact amount of contribution as reported separately on the relevant withdrawal notification forwarded to the Secretary of the Board by the Secretary of the Committee. F.7

In addition to these statements, each member organization shall submit a year-end reconciliation of the total contributions made by the individual participants and the member organization with the total amounts remitted to the Fund during the year. This reconciliation statement shall be certified by the responsible financial officer of the member organization and accompanied by a cheque covering any additional amount which the reconciliation statement may show to be due in respect of the year's operations. F.8

After reconciliation with member organizations of any differences disclosed in the verification of these lists, the Secretary of the Board shall approve the year-end lists. In case of difficulty, the Secretary shall submit the matter to the Board or its Standing Committee for decision. F.9

The Secretary of the Board shall maintain an individual record for each participant, which will show all contributions made by the participant together with other pertinent information regarding contributory service, pensionable remuneration, age, medical classification and family status. F.10

The Secretary of the Board shall maintain the necessary accounting records in order that he may report to the Board the financial status of the Fund at the end of each financial year. F.11

Calculation of interest

For the purpose of accrual of interest under articles III, VII ter, X, XII, XVI.6 and XVIII, the interest shall be calculated to the end of each financial year and compounded annually at that date. F.12

Interest shall be treated as accruing each year, or part of that year, on a participant's contributions to the Fund for that year, or part of that year, averaged at half the rate of interest provided in article XXIX. F.13

In the calculation of interest, periods of less than one calendar month shall, if they amount to fifteen days or more, be treated as one month, or if they amount to less than fifteen days, be disregarded. F.14

For the purpose of calculating monthly instalments, including interest, for the amortization of amounts due under articles III, XII and XVI.7 the interest shall be compounded monthly. F.15

Currency

- F.16** For the purpose of calculating final average remuneration:
- (a) No regard shall be paid to the currency in which contributions were remitted to the Fund in respect of periods of pensionable remuneration before the period to be taken into account in the calculation.
 - (b) Where pensionable remuneration has been paid in one currency and contributions in respect of it remitted to the Fund in another currency, the pensionable remuneration for each year or part of a year to be taken into account shall be converted to the second currency at the rate of exchange at which the contributions in respect of that year or part of a year were converted for the purpose of remittance to the Fund.
- F.17** Whenever, under article XXX.1, pensionable remuneration is expressed in a currency other than that in which the contributions are to be remitted to the Fund, the conversion of contributions shall be made at the rate of exchange prevailing at the time the remittance is due.
- F.18** Notwithstanding rule F.17, whenever a retroactive period of contributory service is validated under article III, the calculation of pensionable remuneration shall be made in US dollars, or in such other currency as agreed by the Board under article XXX.1, at the rate of exchange which would have been used by the employing organization at the time the remuneration was paid.

Section G. Appeals

Appeal against medical classification

- G.1** A participant who has been classified in Class 2 or Class 3 as defined in paragraph B.8 of these rules may, within one month of receiving notice of the decision, request the Committee concerned to reconsider its decision.
- G.2** For that purpose, a medical board shall be set up consisting of three medical practitioners:
- (a) One selected by the participant;
 - (b) The medical officer of the organization or a medical practitioner designated by him; and
 - (c) A third who shall be selected by those designated in (a) and (b) above and who shall not be the medical officer of a member organization.
- G.3** The medical board shall report to the Committee, which shall take a final decision. If the final decision of the Committee alters the classification of the appellant, the member organization concerned shall bear the medical fees and incidental expenses. Otherwise, the participant shall reimburse the fees and incidental expenses of the medical practitioner whom he selected and half the medical fees and expenses of the third member of the medical board. The portion of

the expenses not borne by the participant shall be paid by the organization concerned.

Appeal in cases of disability benefit

Any participant or beneficiary may request the authority which has taken a decision on a disability benefit to review the medical conclusions on which the decision was based and in this respect to reconsider the said decision. Such request shall be addressed through the Secretary of the Committee to the Secretary of the Board if the decision was taken by the Standing Committee, or to the Secretary of the Committee concerned if the decision was taken by a Committee. Every such request must be presented within one month from the date of receiving notification of the decision. G.4

For that purpose, a medical board shall be set up consisting of three medical practitioners: G.5

(a) One selected by the participant;

(b) The medical officer of the organization, or the medical consultant of the Fund, or a medical practitioner designated by him; and

(c) A third who shall be selected by those designated in (a) and (b) above, and who shall not be the medical officer of a member organization.

The medical board shall report to the Pension Committee (or to the Standing Committee), which shall take a final decision. G.6

If the final decision reverses the disputed decision, the medical fees and incidental expenses shall be borne by the organization concerned (or the Pension Fund). Otherwise, the participant shall reimburse the fees and incidental expenses of the medical practitioner whom he selected and half the fees and expenses of the third member of the medical board. The portion of the expenses not borne by the participant shall be paid by the organization concerned or by the Fund as the case may be. G.7

Appeal in cases of widower benefit

A widower who has been refused a pension on the grounds that he is not totally and permanently incapable, either physically or mentally, of providing for his own support may appeal to the authority which rejected his request to reconsider its decision. In such cases, the procedure described in paragraph G.1 shall apply. G.8

Appeal against decisions of Staff Pension Committees

Any staff member of a member organization and any other person who can show that he is entitled to rights under the Regulations of the Fund by virtue of the participation in the Fund of a staff member of such member organization, may request a review of a decision given in his case by the Staff Pension Committee of a member organization. Such request shall be submitted in writing to the Secretary of the Committee concerned within one month from the date of notification of the disputed decision. G.9

- G.10 The Committee concerned shall take a decision on the request within two months from its submission. Appeal may be made from this decision to the Joint Staff Pension Board.
- G.11 If, after expiry of a two-month period after the request for review of a decision, the Committee has taken no decision, the request shall be submitted by the Secretary of the Committee to the Joint Staff Pension Board for decision.

Section H. General provisions

- H.1 All questions regarding the interpretation of the Regulations and of these Rules shall be referred to the Board for decision.
- H.2 These Rules may be amended by the Board provided one month's notice of the proposal has been given to all members of the Board and to the Chairman and Secretaries of Committees or provided the amendment is unanimously adopted by the Board.

ADMINISTRATIVE RULES OF THE
UNITED NATIONS JOINT STAFF PENSION FUND

The Standing Committee of the United Nations Joint Staff Pension Board, acting on behalf of the Board, adopted at its ninety-fourth meeting held on 27 October 1964 the following amendments to the Administrative Rules, effective on that date except Rule B.21, which became effective on 1 March 1965 following amendment of article III of the Regulations by the General Assembly as of that date. The texts given below replace or add to, as the case may be, the previously existing texts:

1. Section B. Participation in the Fund

Admission of a new participant or associate participant

At the earliest possible date each participant and associate participant shall be medically classified by the Staff Pension Committee in compliance with article IX as follows: B.8

Class 1, without any significant physical or mental defect which might involve increased risk as to death or long-term disability.

Class 2, with a defect which involves increased risk as to death or long-term disability.

In each case the Committee shall assign a medical classification upon the recommendation of the medical officer of the organization. All decisions regarding medical classifications shall be communicated immediately to the participant or associate participant and to the Secretary of the Board. B.9

A participant or associate participant classified in class 1 shall be covered immediately by the provisions of articles V, VII.1, VII.6 and VII *bis* 1. B.10

A participant or associate participant classified in class 2 shall be entitled to the benefits provided under articles V, VII.1, VII.6 and VII *bis* 1, only after he has completed five years of contributory service, unless disability or death is the direct result of an accident, or of damage to health arising from service in an unhealthy area. The survivor of such a participant shall nevertheless not be excluded from the provisions of articles VII.1 or VII *bis* 1 if the participant has reached the age of 60. B.11

A participant or associate participant classified in class 2 shall, if his defect has been satisfactorily corrected, be reclassified to class 1. B.12

- B.13 When recommending classification in class 2 the medical officer shall inform the Committee of the time at which re-examination has been recommended to the participant or associate participant.
- B.14 The recommendation of the organization's medical officer shall be made in conformity with the medical standards adopted by the Board and on the basis of a medical examination by the said medical officer or by a medical practitioner selected by him.
- B.15 The medical officer may base his recommendation on a medical examination made by a member organization prior to the admission of a staff member into the Fund provided that such examination was carried out not more than twelve months previously.
- B.16 Before presenting his recommendation to the Committee, the medical officer shall inform the participant or associate participant concerned whenever he is recommending his classification in class 2. The participant or associate participant may request the medical officer in writing to communicate to the Committee such detailed medical information as may be necessary for a full consideration of his classification.
- B.17 A participant or associate participant who refuses to undergo the required medical examination shall not be covered by the provisions of articles V, VII.1, VII.6 and VII bis 1 until he has completed five years of contributory service. He may, however, undergo the medical examination and may then be classified.
- B.18 A participant or associate participant classified in class 2 may lodge an appeal, not later than one month after he has been notified of the decision in accordance with the conditions specified under section G.

Validation by a participant of non-pensionable service

- B.21 *Add the following:*

"Notwithstanding the above provisions, a person wishing to exercise an option in accordance with article III.4 (b) of the Regulations shall be required to make payment in accordance with (a) above."

- B.24 In the event that payments made under (b) or (c) of rule B.21 are discontinued for a reason other than the disability or death of the participant, the participant shall be given notice of his default in payments, and, if the payments in default are not paid within the period specified in the notice, the participant's rights to further validation of that period shall be cancelled. In that case the participant shall be credited with contributory service to the extent to which he has made payments under rule B.21 above. -

In the event that payments under (b) or (c) of rule B.21 are not completed by reason of the disability or death of the participant, he or a survivor on his behalf shall be entitled to complete such payments in a lump-sum within three months of the disability or death. If payments are not so completed the period of service

validated shall remain that in respect of which payments have been made.

Re-employment

In the event that payments are not completed under (b) or (c) of rule B.30 or that the participant ceases to be a participant before he has completed such payments, the sums already paid plus interest shall be refunded to the participant, provided that if such payments are not completed by reason of the disability or death of the participant, he or a survivor on his behalf shall be entitled to complete them by payment of the balance in a lump-sum within three months of the disability or death. B.31

2. Section D. Granting, calculation and payment of benefits

Certification and payment of benefits

The Secretary of the Board shall at intervals of not more than twelve months require evidence that the beneficiary is alive or that the widow or widower of a participant or associate participant has not remarried. D.22

3. Section E. Administrative organs of the Fund

Standing Committee

Add the following:

E.10

"If an organization or group of organizations represented on the Standing Committee is unable to send its duly appointed member or alternate to a meeting of the Committee, it shall have the right to be represented by an observer, who shall not have the right to vote in the Committee. Observers shall have the right to speak with the permission of the Chairman."

4. Section G. Appeals

Appeal against medical classification

A participant who has been classified in class 2 as defined in paragraph B.8 of these rules may, within one month of receiving notice of the decision, request the Committee concerned to reconsider its decision. G.1