

Special reimbursement or

Article 72(3) of the Staff Regulation

The special reimbursement is governed by Article 72(3) of the Staff Regulation:

« Where the total expenditure not reimbursed for any period of twelve months exceeds half the official's basic monthly salary or pension special reimbursement shall be allowed by the appointing authority, account being taken of the family circumstances of the person concerned, in manner provided in the rules referred to in paragraph 1. »

What does special reimbursement mean?

This is a supplementary reimbursement of medical expenses where the member is left with a significant amount to pay after the standard reimbursement.

How does it work?

The special reimbursement in 2 points:

- This applies where, over a twelve-month period, the unreimbursed portion of eligible expenses exceeds half of a basic monthly salary.
- The portion exceeding half of the basic salary is reimbursed at 100% if the member is covered under their own policy; otherwise, it is reimbursed at 90%.

One example:

A civil servant with an average monthly basic salary of €1,800 spent €10,000 on medical expenses between March 2012 and February 2013. After reimbursement by the JSIS, amounting to 80% of this sum, they are left with €2,000 to pay themselves. This is more than half of their average monthly salary (€900). They can therefore apply for a special reimbursement.

Note!

Excessive costs

Certain costs deemed excessive under the regulations are not reimbursable and remain the responsibility of the member under the standard reimbursement scheme.

These costs are also excluded from the calculation of the special reimbursement.

Joint rules, Article 24

- Special reimbursement provided that the costs do not exceed:
 - – 50% of the cost corresponding to 100% of the applicable reimbursement limits;
 - – and, for benefits not subject to a limit, 50% of the amount corresponding to 100% of the expenses actually reimbursed at the current rates,
- The 50% excess threshold is calculated after any application of the weighting.

Joint rules, Article 24

Members who are no longer entitled to a salary or allowance

The special reimbursement is calculated on the basis of half of the last basic monthly salary received or the last monthly allowance received

Joint rules, Article 24

Spouses or recognised partners who are both members of the JSIS

The following may choose to combine the unreimbursed portions of their medical expenses, provided that:

- this is done in the name of the spouse or partner with the higher basic income;
- the other spouse or partner waives the right to submit a separate application for special reimbursement;
- the twelve-month period taken into account is the same for both spouses or partners.

Joint rules, Article 24

Who decides ?

The decision on any application for a special reimbursement is taken:

- by the appointing authority of the institution to which the person concerned belongs, on the basis of an opinion issued by the Settlement Office in accordance with the general criteria laid down by the Management Committee, following consultation with the Medical Board, regarding whether the costs incurred are excessive;
- or by the Settlement Office, on the basis of the same criteria, if it has been designated for that purpose by the said authority.

Loss of entitlement

Claims for the special reimbursement referred to in Article 24 must be submitted within twelve months of the date on which the costs of the last service covered by the twelve-month period in question were reimbursed.

Procedure

- At the request of the member eligible for the special reimbursement (or on the initiative of the JSIS), an information sheet based on the maximum amounts incurred over the past 36 months is sent to them.
- The member must return the information sheet, duly signed, specifying the 12-month period they wish to select. If the member does not specify the chosen period, the period that appears most favourable to them will be used to calculate the special reimbursement.

Namely

- The calculation is based on the date of the services provided, not on the date of the claims.
- Expenses submitted after the special reimbursement has been made cannot give rise to an additional special reimbursement.
- If the family situation changes during the chosen period, the situation most favourable to the member will be used to determine the percentage to be reimbursed.

IMPORTANT

Portal: We encourage you to read the pages dedicated to Article 72(3) on the Pensioners

https://digit.service-now.com/asc?id=kb_article&table=kb_knowledge&sys_id=c6107824c3cce6d029d81a0d7a01319e&recordUrl=%2Fkb_view.do%3Fsys_kb_id%3Dc6107824c3cce6d029d81a0d7a01319e

Article 72 of the Staff Regulation:

<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:01962R0031-20260101>

Joint Rules, see Article 24:

[https://digit.service-now.com/\\$viewer.do?sysparm_stack=no&sysparm_sys_id=54e5a99247a152d0dc74420f316d436f](https://digit.service-now.com/$viewer.do?sysparm_stack=no&sysparm_sys_id=54e5a99247a152d0dc74420f316d436f)