



Notes for Short Term Consultants (STC) And Short Term Temporaries (STT) HQ Appointments

INTRODUCTION. These notes are for the guidance of the STC/STT hired by the Bank Group (the term "Bank Group" refers to the World Bank, IFC, ICSID, M.I.G.A.). In the event of any discrepancy between the information contained in these notes and the terms and conditions of the letter of appointment issued by the Bank Group, the terms and conditions of the letter of appointment will prevail.

IMPORTANT. All HQ STs **must** complete/sign their letter of appointment and send all pages to [HR Operations](mailto:hropérations@worldbank.org) at hropérations@worldbank.org **before** undertaking any work or official travel. Your UPI number is printed on the top left-hand corner of the signature page of your letter of appointment.

DEFINITION. A STC/STT appointment is a periodic appointment for up to a maximum of 150 days or 1,200 hours per fiscal year (inclusive of overtime for STT). Certain former WBG staff may have different limits to this. Reappointment of former staff is governed by [Staff Rule 4.01, Section 8](#).

EMPLOYMENT SCREENING. Effective April 1, 2023, Criminal History screening is required for new Short-Term Consultants(STC) and Short-Term Temporary(STT) appointments who have been granted access to handle World Bank Group information categorized as "Confidential", "Strictly Confidential", or personal data that is "Sensitive" as outlined under the [ITS ST Tiered Access Framework](#). 'New' STC/STT appointments include ST's who have not been employed by any WBG entity under any appointment type in the past. If this appointment requires Employment Screening you will receive an email from the WBG screening vendor with the subject "**World Bank Group Background Verification Request for [applicant name]**" to initiate your screening after the Letter of Appointment (LOA) is signed.

CLOSE RELATIVES. The Bank Group's employment policies prohibit the simultaneous employment of close relatives (so-called Category I Relatives, which include mother, father, sister, half-sister, brother, half-brother, son, daughter, aunt, uncle, niece or nephew). The Bank Group's employment policies also place certain restrictions on employment of other close relatives (so-called Category II Relatives, more specifically defined in the SR 4.01, Appointment, para. 5.03(b)). The policy applies to all STC/STT who perform services for the Bank Group under a Bank Group appointment or as an employee of a firm/agency. Before accepting an assignment, STC/STT are required to acquaint themselves with the restrictions on relatives' employment contained in SR 4.01, par. 5.03 and report to HR Operations (Bank and MIGA appointments) or Client Services (IFC appointments) any close relatives working for the Bank Group. In addition, STC/STT may not accept assignments in operations that are authorized, supervised or monitored by a first-degree or second-degree family member as part of his or her official or professional duties, or by someone reporting to such a family member.

EMPLOYING SPOUSES AND DOMESTIC PARTNERS. The spouse or domestic partner of a staff member who meets the normal selection standards may be employed by the Bank Group. A spouse or domestic partners may be assigned to the same vice presidency or department, if neither supervises the other, directly or indirectly, and if their duties are not likely to bring them into routine professional contact. They may not be assigned to the same division or equivalent unit. A spouse or a domestic partner of a staff member may be assigned to the same country office, provided that neither supervises the other, directly or indirectly, and provided that the Vice President responsible for the country office, in consultation with the Manager, Human Resources Operations or the IFC Manager, Recruitment, approves the assignment.

AVOIDING CONFLICT OF INTEREST. Neither STC/STT, nor any members of their immediate families, may be employed by member governments or other entities on World Bank Group-financed

projects during the period of employment with the World Bank Group, if the work is for the same country. In addition, for a period of two years after termination of such employment, STC/STT should not seek or accept work connected with projects or operations that were their direct concern or make use of material acquired during assignments, unless the prior consent of the World Bank has been obtained, as per [Staff Rule 3.02](#).

FEES. STC fees may be established on either a daily or hourly (subject to a maximum of eight hours per day) basis. STC are not entitled to overtime pay. STT fees are established on an hourly basis. STT are eligible for overtime after working 40 hours per week and as approved by the hiring manager. The rate of overtime is one-and-one-half times the hourly rate.

PAYMENTS. STC/STT are paid for actual time worked. Time spent in official travel status performing Bank Group work, including authorized stopovers, counts as time worked. Saturdays, Sundays, and public holidays are paid for only if the STC/STT actually works on those days. This is applicable whether in Headquarters or in the Country Offices.

STC/STT should submit complete payment information on local bank account to the admin contact listed in the letter of appointment. STC/STT should render services only after the acceptance of contract. No services should be rendered before the effectiveness date or after the contract validity period. For the services rendered, the STC/STT may complete the payment request online at <http://strequest.worldbank.org>. The deliverables as agreed must be attached in the ST payment module to substantiate the payment request. Payments will be made directly to the bank account indicated by the STC/STT. Commercial bank charges in connection with receiving such payments are the responsibility of the STC/STT, and will not be reimbursed by the Bank Group. Inquiries on payment should be directed to the admin contact."

SECURITY AND SAFETY. During your appointment you may draw on Bank Group security and safety resources and are obligated to follow related institutional policies. A summary of resources, requirements and best practices is available at <http://security/> and in the [e-Learning Security Responsiveness course](#). Country-specific travel safety and security information is available on the [Country Clearance Advisory](#) site. Contact wbgsecurity@worldbank.org for more information. You may also refer to [Safety and Security Guidance for STCs/STTs](#).

TAX INFORMATION. Review information as mentioned below:

- **FOR U.S. NATIONALS.** All U.S. nationals, including those U.S. nationals who are also nationals of another country, are paid on a gross basis and are subject to U.S. taxation on their Bank Group income, regardless of place of residence. STT/STC fees paid to all U.S. nationals are reported by the Bank Group to the IRS. Fees paid to all STTs are reported on Form W-2. Fees paid to STCs are reported on either a Form W-2 (for staff who classify as employees under the U.S. tax classification rules) or a Form 1099-MISC (for staff who classify as independent contractors under the U.S. tax classification rules), depending upon the nature of the assignment and the conditions under which services will be rendered. The determination of a staff member's status as a 1099 or W-2 recipient is made at the time of the preparation of the terms of reference for the assignment and then communicated to the STC by the hiring Task Team Leader. For US income tax reporting purposes, it is important that the STC/STT update any change of address via MyHR Self-Service at <https://myhrss.worldbank.org/>, or alternatively by email to HR Operations requesting that the address be updated. If you have questions about tax reporting, please refer to the [STC Tax Classification FAQs](#) or contact the Tax Office, WFACS (email: TaxOffice@worldbank.org, telephone: 202-458-4191).
- **FOR CANADIAN NATIONALS.** Section 110(1)(f)(iii) of the Income Tax Act (Canada) provides that a taxpayer, in computing taxable income for a taxation year, may deduct income from employment with a prescribed international organization to the extent that it has been included

in computing the taxpayer's income for the year. The Canadian Department of Finance has confirmed that the institutions of the Bank Group are prescribed "international organizations" for purposes of the deduction. Thus, under these rules you may deduct employment income from the Bank Group from the STC/STT taxable income that is subject to Canadian federal net income tax. Because the provinces other than Quebec impose provincial income tax based on basic federal tax payable, these rules effectively eliminate provincial income tax in those provinces on such employment income. For residents of Quebec, international organization income should be deducted on the Quebec tax return.

- **FOR FRENCH CITIZENS.** All French citizens, including those who are residents in France for tax purposes, are exempt from taxation on Bank Group compensation. Staff who are French citizens and French tax residents may request a tax exemption statement from the Tax Office, email address TaxOffice@worldbank.org, if they are required to attach the statement to their French tax returns.

CONTACT INFORMATION. The World Bank Group Emergency Contact System is used to contact a relative or friend in the event of an emergency. Please provide your personal and emergency contact information once you have received access to the WB systems by logging into myHR Self-Service at <https://myhrss.worldbank.org/>. If you do not have access, please provide your contact information (address, phone number & personal email address) by email to HR Operations at hroperations@worldbank.org.

VISA SERVICES. Review information as mentioned below:

- Every World Bank Group employee (including interns) must have or obtain an appropriate visa and/or work authorization before undertaking any assignment for the Bank Group in the U.S. In accordance with U.S. laws, if you are not a U.S. citizen, you are required to provide to HR Operations copies of relevant documents validating your eligibility to work in the United States (see table below).

Visa Type	Copy of Required Documents to submit with letter of Appointment
PR	<ul style="list-style-type: none"> • Permanent Resident (front and back)
G4 – Principal	<ul style="list-style-type: none"> • G4 visa • I-94 document (https://i94.cbp.dhs.gov/I94/#/recent-search) • First date of entry stamp into the US as G4 visa holder
F1	<ul style="list-style-type: none"> • F1 visa • I-94 document (https://i94.cbp.dhs.gov/I94/#/recent-search) • Valid OPT or CPT
G4 – Dependent	<ul style="list-style-type: none"> • G4 visa • I-94 document (https://i94.cbp.dhs.gov/I94/#/recent-search) • Employment Authorization Card (Work Permit)
A1 – Dependent	<ul style="list-style-type: none"> • A visa • I-94 document (https://i94.cbp.dhs.gov/I94/#/recent-search) • Employment Authorization Card (Work Permit)
U.S. Asylum or Refugee	<ul style="list-style-type: none"> • Employment Authorization Card (Work Permit)

- Obtaining a visa or work authorization can take time. Therefore, staff members are advised to start the process immediately upon receipt of the letter of appointment, if required.

- **G4 principal visa:** The applicant submits a request for a G4 visa through HR Operations. The visa is issued by a U.S. consulate or embassy outside the U.S. at no fee. To request a G4 visa, access <http://www.worldbank.org/humanresources>, then click "Forms" under Site Tools; "G4 or G1 Visa Services"; then complete and submit "[Form F00039 Overseas Visa Request](#)" using the instructions on the form. Once HR Operations sends an official request, the applicant travels to the U.S. Embassy/Consulate at his/her expense and handles the application process. An incoming staff member residing in the U.S. on any other non-immigrant visa not listed above must obtain a G4 visa prior to starting employment with the World Bank Group. An individual in the U.S. on a B1/B2 visa (visitor/tourist) or under the Visa Waiver Program is not authorized to work in the U.S. and must obtain a G4 visa outside the U.S.
- **F-1 (student) visa under curricular practical training (CPT) or optional practical training (OPT):** Work authorization must be received via endorsement from the designated school official (DSO) on the student's immigration Form I-20. The student must also have an Employment Authorization Card (work permit) issued by the U.S. CIS (Citizenship & Immigration Services, formerly "INS"). An F-1 visa is not sufficient without this work authorization.
- **STs on a Full-Time work schedule:** A work schedule is considered full-time if it requires a minimum of 35 hours per week for 65 or more consecutive business days (90 calendar days). The 35 hours can be achieved through a single or combination of several contracts. However, the sum of all billed hours must be a minimum of 35 hours per week.
 - STs who work full time must be registered with the State Department within 15 days of starting employment. For registration with the U.S. State Department, STs must complete and submit form [F00044 Request for PID Number](#) to HR Operations using the instructions on the form.
 - Dependent G4 visas may be issued to immediate family members of a G4 principal visa holder to enable them accompany and reside with the staff member in the U.S. for the duration of his/her employment in the country. G4 visa holders and their dependents have a 30-day grace period to leave the U.S. upon completion of the staff member's contract.
- **STs on Temporary Duty (TDY) work schedule:** A work schedule is considered TDY if an individual works less than 35 hours per week or an individual works a minimum of 35 hours per week but will complete the work program in less than 65 consecutive business days. A TDY- Visa holder cannot reside in the U.S. for more than 90 consecutive calendar days.
 - An ST who works on Temporary Duty in the U.S. on a G4 visa cannot stay in the U.S. for more than 90 consecutive calendar days. At the end of each 90-day period, the ST must leave the U.S. and re-enter to work the remaining days on his/her contract. Once all days in the contract are exhausted, the G4 visa holder must leave the U.S. immediately.
 - If an ST's work schedule changes from part-time to full-time within the fiscal year, the World Bank Group is mandated to register the full-time employment with the State Department. For more information, please contact HR Operations.

- Special Note for Spouses and Same-Sex Domestic Partners on H1B Visas or Other Non-Immigrant Visas with U.S. Work Authorization:
 - U.S. immigration regulations require that any individual entitled to a G4 visa, such as a non-immigrant spouse or same-sex domestic partner of a World Bank Group staff member holding a G4 visa, must be issued a G4 visa if the individual resides in the same household of the G4 staff member. [U. S. State Department, Reference: 22 CFR Sec. 41.24 (b) (4)]. The sole exception to this rule is for A-visa holders (diplomats).
 - In practice, this means that a spouse or same-sex domestic partner currently working in the U.S. on an H1B visa or other non-immigrant visa (other than an A-visa) with work authorization must change to a G4 dependent visa when the staff member obtains his/her G4 principal visa. The spouse/same-sex domestic partner must stop working when his/her status changes to G4 dependent and resume work when he/she obtains a valid work authorization under the G4 dependent visa. The spouse/same-sex domestic partner can submit the application for a work authorization when:
 - a) The staff member obtains the G4 principal visa
 - b) The staff member commences employment with the World Bank Group
 - c) The Principal G4 visa holder has more than 6 months on the contract and is working full time
 - d) The spouse/same-sex domestic partner has obtained the G4 dependent visa and is Physically present in the U.S.
 - The process of obtaining a G4 dependent work authorization takes approximately three (3) months.
 - If a staff member starts employment with the World Bank Group on a non-immigrant visa with work authorization (for example, an F-1 visa during the Optional Practical Training period) and later on, during employment with the Bank Group, obtains a G4 visa, the same procedure would apply for any dependent(s) switching to a G4 dependent visa and obtaining work authorization. Prior to accepting an offer from the World Bank Group, the staff member should plan carefully with his/her dependent spouse/partner and the latter's U.S. employer to accommodate the dependent's unpaid leave of absence. Any employment without work authorization is prohibited by U.S. law with major potential consequences to the employer and employee. Deferred payment (working now, getting paid later after the work authorization is granted) is equally illegal.
- G4 Spouse and Dependent Employment: While residing in the U.S., a G4 dependent of an ST working full time and with more than 6 months on the contract may apply for an employment authorization card through HR Operations to the U.S. State Department and the U.S. Citizenship and Immigration Services for a work permit that allows him/her to work in the U.S. while in G4 status. The Work Authorization process may take up to three months (and occasionally longer). The delay occurs as the U.S. authorities process the application; the World Bank Group has no influence or control over the process or the delay. World Bank Group staff members are obliged to provide the mandatory information to support a Work Authorization application or extension.
- G4 Visa Status upon End of Employment: The World Bank Group (WBG) reports the departure of all U.S. State Department registered staff and dependents for un-registration as of their date of departure from the WBG. Full time staff Registered with the State Department must start the process of changing to a new visa category or depart the United States within 30 days of departing the WBG. Short term consultants not registered

with the State Department have no grace period and must either depart the United States or change to another visa status at the completion of their contract. The G-4 visa issued for employment will remain valid until the expiration date printed on the visa but can only be used for WBG related travel to the United States. Dependent work authorizations expire upon the date of departure from the WBG, regardless of the expiration date printed on the card.

OFFICIAL TRAVEL. All official/operational travel by an STC/STT must take place within the effective dates of the relevant letter of appointment (LOA) and corresponding purchase order (PO). The departure date of the STC/STT trip must be on or after the start begin date indicated in the STC/STT Letter of Appointment (LOA) and the corresponding PO line item.

For further information, please contact your Task Team Lead.

TRAVEL ARRANGEMENTS. Travel and hotel reservations for STC/STT are approved and arranged by the hiring department. The Travel & Visa Unit (GSDTV) will furnish tickets at World Bank Group headquarters in Washington, DC or authorize the World Bank-contracted travel agency nearest the STC/STTs' home to issue the tickets. Travel for STC/STT will be by less than first class as authorized by the hiring department. The travel agency will confirm the most direct route using the World Bank's preferred airlines. STC/STT are not eligible for first class travel. When business class is authorized for official travel, staff may not "downgrade" to economy class in order to use any savings associated with the downgrade for personal gain; (i.e. personal stop). This applies even if the downgrade results in a cost saving to the Bank. GSDTV can assist in obtaining visas for missions originating in North America. If the STC/STT is not originating in North America, the necessary visa should be obtained in the home country by the STC/STT. If necessary, STC/STT can request the help of a Bank Group Country Office as appropriate. For more information, review the Travel Guidance and Procedure.

UN Laissez-Passer passports are not issued to STC/STT. If helpful, GSDTV Passport and Visa Office can provide a UN Certificate. This Certificate is not for visa purposes, but only for identification to facilitate entry into some countries. STC/STTs are entitled to functional immunity during the appointment with the World Bank for activities carried out on behalf of the World Bank. STC/STT should contact their hiring manager with any further questions about travel arrangements.

HOTEL AND SUBSISTENCE EXPENSES. The hiring department authorizes on completion of the assignment either (a) reimbursement for actual reasonable subsistence expenses or (b) a per diem in lieu of actual reasonable expenses incurred while on operational travel. Please see the following important information:

(a) If the hiring department authorizes reimbursement for actual reasonable subsistence expenses, receipts must be submitted to the hiring department (not to HR Operations) for approval within two weeks of the conclusion of the travel. The hiring department will enter the trip expenses and upload scanned receipts as Required by AMS 3.10 (e.g., eticket/boarding pass, hotel invoice, expenses of over \$75). Reimbursable expenses are: hotel room, meals, taxi fares, baggage handling, and valet services, taxes and tips or gratuities incidental to these costs as per AMS 3.10 - Operational Travel Expense Reimbursement. Per the policy, non-availability/delayed submission of relevant supporting documents/clarification may render expenses ineligible and lead to recovery of reimbursements made. Representation expenses will be reimbursed only if the prior approval of the hiring manager/mission leader has been obtained.

(b) Per Diem in lieu of actual reasonable expenses: If STC/STT are US nationals, please note that there may be income tax implications. US tax regulations require employees whose employers pay a per diem allowance, to report as income any amount in excess of the IRS-specified rates (GSA for US travel or Department of State for overseas travel). However, they are not required to report this as income if the employee claims for reimbursement under an

accountable plan (actuals). Because the Bank Groups' per Diem in some cities may exceed the IRS specified rates, US nationals must submit actual expenses for reimbursement. The hiring department will provide the amount of the per diem.

For further information or questions, please contact your Task Team Lead or hiring department

ADVANCES. The Bank Group does NOT provide advances for hotel and subsistence costs. However, the hiring department can arrange for an advance of professional fees. This is facilitated by requesting an advance through the travel module which will be adjusted against the next fee payable.

WORKER'S COMPENSATION INSURANCE. A Worker's Compensation Insurance policy covers individual STC/STTs employed by the Bank Group with respect to injuries arising out of and in the course of their employment and provides benefits in accordance with the District of Columbia Worker's Compensation Act. The term "injury," as defined in the Act, means "accidental injury or death arising out of and in the course of employment and such occupational disease or infection arising naturally out of such employment..."

BANK PAID ACCIDENTAL DEATH AND DISMEMBERMENT INSURANCE (AD&D). When STC/STT are on authorized official Bank Group travel, the insured amount is three times "net annual salary"¹ up to a maximum of \$250,000 (minimum \$50,000) under the Bank Paid Accidental Death and Dismemberment Insurance Policy. The policy also includes coverage for accidental death as a result of an aircraft accident during official travel at three times net salary (maximum \$100,000). A benefit equal to three times net annual salary (maximum \$250,000, minimum \$50,000) coverage applies if an STC/STT dies or suffers a covered loss as a result of an act of war (declared or undeclared). If a loss is covered under multiple policy provisions, only one benefit is payable, the largest.

LIMITED MEDICAL COVERAGE OUTSIDE YOUR HOME COUNTRY: The Bank Group provides limited Medical Expense Insurance coverage for individual STC/STT with respect to expenses for emergency medical care or related to an accident while on authorized official travel status on World Bank Group business outside their country of residence. Subject to certain conditions and limitations, 80% of covered charges in excess of a \$150 deductible are reimbursed, up to a maximum benefit of \$50,000. The \$150 deductible and \$50,000 maximum benefit apply to each accident or illness. Contact Disability@worldbank.org if you have additional questions or to file a claim. In the event of severe or life-threatening illness or injury requiring immediate medical attention, follow the Overseas Medical Emergency Procedures.

Note: Medical Evacuation costs are covered:

- when outside a 100-mile radius from current place of primary residence. Maximum \$100,000 during any one period of individual coverage.
- for repatriation of mortal remains.

BAGGAGE INSURANCE. If you are not reimbursed by the airline, a limited insurance policy for the loss of accompanying baggage during official travel is provided. This policy has loss limits and exclusions, and will not cover items such as lost cash, currency, passports, airline tickets, or documents. More information on the limits and exclusions of this policy are available from the Willis Group. Please contact the Willis Relocation Risk Group (Susy Castellanos at 202-536-4438 or email: susy.castellanos@WillisTowersWatson.com), for additional information on this insurance coverage.

¹ "Net annual salary" for the purposes of this insurance benefit only is calculated based on actual Bank Group earnings for the 13-week period (annualized) immediately prior to a covered loss.

DISABILITIES. If you require any special accommodation, please contact your hiring Department's Human Resources Manager.

HEALTH. STC/STT staff are required to obtain an International Certificate of Vaccination from a licensed medical provider and to make sure that they have the immunizations and medication necessary for the countries to which they will be traveling on Bank Group assignment(s). The Health Services Department's (HSD) Clinic is available at no cost to STC/STT staff in Washington DC for mission travel preparation and in cases of emergency. For Country Office based STC/STT staff, immunizations and medications needed for mission travel should be obtained by their private medical provider. For urgent care needs of STC/STT staff in Washington DC, STC/STT staff may request care on a Fee for service basis. Any operationally incurred travel related illness or injury costs can be reviewed in accordance with SR 6.11 (WBG Workers Compensation program). HSD will assist, if requested or required, by suggesting names of medical practitioners in the Washington area. The medical staff in the Health Clinic can provide medicines or prescriptions to STC/STT staff on a fee for service basis.

IDENTIFICATION CARD. STC/STT must have a valid building pass, issued by the Security ID Office, to gain access to Bank Group premises for the duration of an assignment. Building passes must be requested in person.

ACCESS TO INFORMATION. [Staff Rule 2.01](#) stipulates that access to salary and benefits information is automatically granted upon request to spouses or registered domestic partners. The staff member is typically not notified of such disclosure unless authorized by the spouse or registered domestic partner.

MANDATORY EARNING COURSE. All STs are required to take the mandatory eLearning course, '[Overview of the WBG for ST staff](#)'. The course is a self-paced e-Learning module for Short Term Consultant/Temporary which will help with their on-boarding and orientation to the WBG and acquire the knowledge, skills, and behaviors to become an effective member of the WBG. It also provides information related to policies surrounding the ST appointment.