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# Foreign Service Employees' Handbook

June, 1982

## **Some Words of Caution**

Whenever you deal with complex subjects in colloquial terms, it is virtually impossible to cover every detail and nuance. This handbook attempts to provide a broad explanation of the FSDs in layman's language rather than "legalese". In an effort to meet the most general concerns of the widest user group, some provisions and guidelines of the Directives have been addressed to a greater extent than others. While the advice herein is as accurate and current as possible, the contents do not have any legal authority whatsoever. Employees are therefore advised to use the handbook in conjunction with the official text of the Directives, Treasury Board Transmittal letters, and related Authorities and not as a substitute.

**Foreign Service Employees'  
Handbook**

**Issued by the  
Bureau of Personnel  
Staff Relations and Compensation  
Division**

43-237-2/2

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Department of External Affairs



Canada

Ministère des Affaires extérieures

OTTAWA, K1A 0G2

UNCLASSIFIED

ABRA-2265

April 11, 1983

MEMORANDUM

TO: All Users of the Foreign Service Employees' Handbook

FROM: ABR

SUBJECT: Corrections to June 1982 edition

In accordance with the instructions that follow, users are requested to make handwritten amendments to their copies of the Handbook. It should also be noted that changes to acronyms as well as the locations and phone numbers of certain units in headquarters have occurred due to Departmental reorganization and restructuring. A new Appendix B - "Who Does What at Headquarters" has been attached for easier reference.

A handwritten signature in black ink, appearing to read "R. G. Woolham", with a horizontal line underneath.

R. G. Woolham  
Director  
Personnel Administration Division

Att:

## INTRODUCTION

### Page 3

- Paragraph 2 Delete "Bureau of Personnel" and insert "Personnel Management Branch"

### Page 4

- Paragraph 2 "copy of FSDs", means the Foreign Service Directives published by the Treasury Board as sub-chapter 540-2 supplement 001 to the Personnel Management Manual (April 1979) plus Treasury Board Transmittal letters 540-2 of 23 March, 1982 and 540-2 of 22 March, 1983 and the Schedule to Foreign Service Directives and Meal Rates revised monthly by ABRA.

### Page 6

- Paragraph 2 Following the first sentence ending "... foreign service employee.", insert this sentence: "These key events are represented by boxes and the captions between each box are the chapter titles in this Handbook."

## CHAPTER 1 - EARLY PREPARATIONS

### Page 12

- Paragraph 1 Delete the first sentence and the second sentence until "(APOB)," and insert: "The Posting Briefing Centre is located in Tower A, Room A1-295 of the Lester B. Pearson Building. The centre is ...".

### Page 16

- Paragraph 2 In the last sentence, delete "Personnel Operations Division (APO)" and substitute "Personnel Management Branch (APP)".

### Page 21

- Table II The dollar amounts in this table have been increased by 7.84 percent effective 01 April, 1983. Refer to the Schedule to Foreign Service Directives and Meal Rates, April 1983 and subsequent editions.

Page 22

Table III The dollar amounts have been increased by 7.84 percent effective 01 April, 1983. Refer to the Schedule to Foreign Directives and Meal Rates, April 1983 and subsequent editions.

Page 25

Paragraph 2 In the second sentence, change "\$35,000" to "\$37,744". (This amount has been increased by 7.84 percent effective 01 April, 1983.)

Page 26

Paragraph 5 Delete last sentence and replace with: "Requests for special leave should be addressed to ABRS who will consult ABRA if the number of days required is beyond the entitlement in your collective agreement."

Page 27

Paragraph 3 - In the second sentence change the amount "\$15,000" to read "\$16,176". (This amount has been increased by 7.84 percent effective 01 April, 1983.)

- In the third sentence, change "are entitled to" to "may".

Page 28

Paragraph 3 - Delete first sentence and replace with "Applications for posting loans are submitted to ABRB on form FS10."

- Delete the words "they have" in the third sentence and replace with "ABRB has".

- Delete "The Loans Officer" in the last sentence and replace with "ABRB".

Paragraph 5 In the third sentence, delete "the Department's Financial Counsellor in APRA" and replace with "your personnel services unit in APP,".

CHAPTER 2 - GETTING READY FOR RELOCATION

Page 46

Table V The dollar amounts in this table have been increased by 6 percent effective 01 April, 1983. This is in accordance with the government's restraint program. Refer to the Schedule to Foreign Service Directives and Meal Rates, April 1983 and subsequent editions.

Page 49

Paragraph 1 In the fourth sentence delete "place of duty in Canada and the post" and substitute "present and new place of duty".

Page 50

- Paragraph 1 - (b) April 1, 1983. Delete the amounts indicated and replace them with "\$1,272", "\$106" and "\$5" respectively. Add "These amounts represent a 6 percent increase over the rates in effect during 1982, in accordance with the government's restraint program."
- (c) April 1, 1984. Delete entire section and replace with "\$1,336 per year or \$111 per month or \$5 per day".
- Add a new paragraph "(d)" which states: "April 1, 1985 and subsequent years: The fixed amount will be updated annually on the basis of the methodology agreed to in the National Joint Council. i.e. revert to the fixed rate of \$1,800 which would have been effective April 01, 1983 had the restraint program not been legislated."

Page 67

Paragraph 3 In the third sentence, delete "to the post from your old place of duty in Canada." and substitute "from your present place of duty to your new place of duty."

Page 69

Paragraph 2 In the second sentence, change "\$1,800" to "\$1,940" and replace the words "associated with" with "directly attributable to".

CHAPTER 4 - LIFE AT THE POST

Page 121

Following the last paragraph on "Insurance" at the top of the page, add the following:

"WARNING - some employees, for whatever their personal reasons, choose not to insure their personal effects or to obtain coverage which is comprehensive enough to meet reasonable risks associated with a foreign environment. Such a decision is often based on the false presumption that the Department is required to compensate an employee for personal losses or damages occurring outside of Canada. The importance of adequate insurance, including personal liability insurance for accidents occurring in staff quarters, can not be overemphasized. Your employer is not liable for damages or injuries caused by your own negligence or by your personal decisions to decline or ignore the importance of suitable insurance."

Page 144

last paragraph After "Assignment Officer" add "or Personnel Services Officer".

APPENDIX A - CONDENSED FSDS

Page 160

FSD-10 Increase amount "\$15,000" by 7.84 percent to read "\$16,176".

Page 161

Incidental Relocation Expenses

Increase amount "\$1,800" by 7.84 percent to read "\$1,940".

Page 164

FSD-30 Delete "\$1,800 per year from (April 1/83)" and substitute "\$1,272 per year, \$105 per month or \$5 per day effective April 1, 1983".

Page 170

FSD-55

Increase amount "\$35,000" by 7.84 percent to read "\$37,744".

Page 171

FSD-56

Delete "Proposed table varies ... dependants."

Page 171

FSD-58

The applicable dollar amounts have been increased by 7.84 percent effective 01 April, 1983. Refer to the Schedule to Foreign Service Directives and Meal Rates, April, 1983 and subsequent editions.

APPENDIX B

WHO DOES WHAT AT HEADQUARTERS?

This is a ready reference to some of the Divisions and Sections responsible for the administration of the Foreign Service Directives, Personnel Policy and related areas.

<u>Area of Concern</u>	<u>Communicate With</u>
Accommodation	MRML
Allowances (Calculation and Payment)	ABRB
Allowances (Policy)	ABRA
Assignments, Officers	APG
Assignments, Support Staff	APS
Canada-Savings Bonds (Payroll deductions)	ABRB
Collective Agreements	ABRS
Compassionate Travel	ABRA
Conflicts of Interest	PUAN
Discipline	ABRS
Educational Allowances	ABRA
Education Travel	ABRA
Employee Assistance Program	ABRN
Family Reunion Travel	ABRA
Foreign Service Directives (Policy)	ABRA
Foreign Service Leave/Option	ABRB
Foreign Service Travel Assistance	ABRA
Grievances	ABRS
Hardship Post Committee	ABRX
Health Care Expenses	ABRA
Health Insurance	ABRA
Leave and Attendance	ABRB
Leave Without Pay	ABRS
Loans, Issuance	ABRB
Loans, Recovery	ABRB
Mailing Privileges	MGIM
Meal Rates	ABRR
Medical Expense Advances	ABRA
Medical Travel	ABRA

<u>Area of Concern</u>	<u>Communicate With</u>
Occupational Health and Safety	ABRS
Official Hospitality	ABRX
Official Languages	AOL
Passports	MPP
Pay	ABRB
Personnel Welfare Counselling	ABRS
Post Index	ABRA
Posting Arrangements	ATDB
Pre-Posting Briefings	ATDB
Relocation, Coordination and Claims	ABRR
Removal of Effects	ABRR
Retirement	ABRN
School Holiday Maintenance	ABRA
Security	ZSS
Special Leave	ABRS
Superannuation	ABRN
Travel Entitlements	ABRT
Voting Abroad	ABRS

## CONTENTS

INTRODUCTION	3
CHAPTER ONE      Early Preparations	11
CHAPTER TWO      Getting Ready For Relocation	43
CHAPTER THREE    The Pre-Posting Countdown	85
CHAPTER FOUR    Life At The Post	111
GLOSSARY	150
SELECTED BILIOGRAPHY	156
APPENDICES	
Condensed Foreign Service Directives	159
Who Does What At Headquarters?	175
Family Budget Analysis	177
Consolidated Education/Family Reunion Entitlements	180
Travellers' First Aid/Medical Kit	183
Important Personal Data	185
SUBJECT INDEX	187

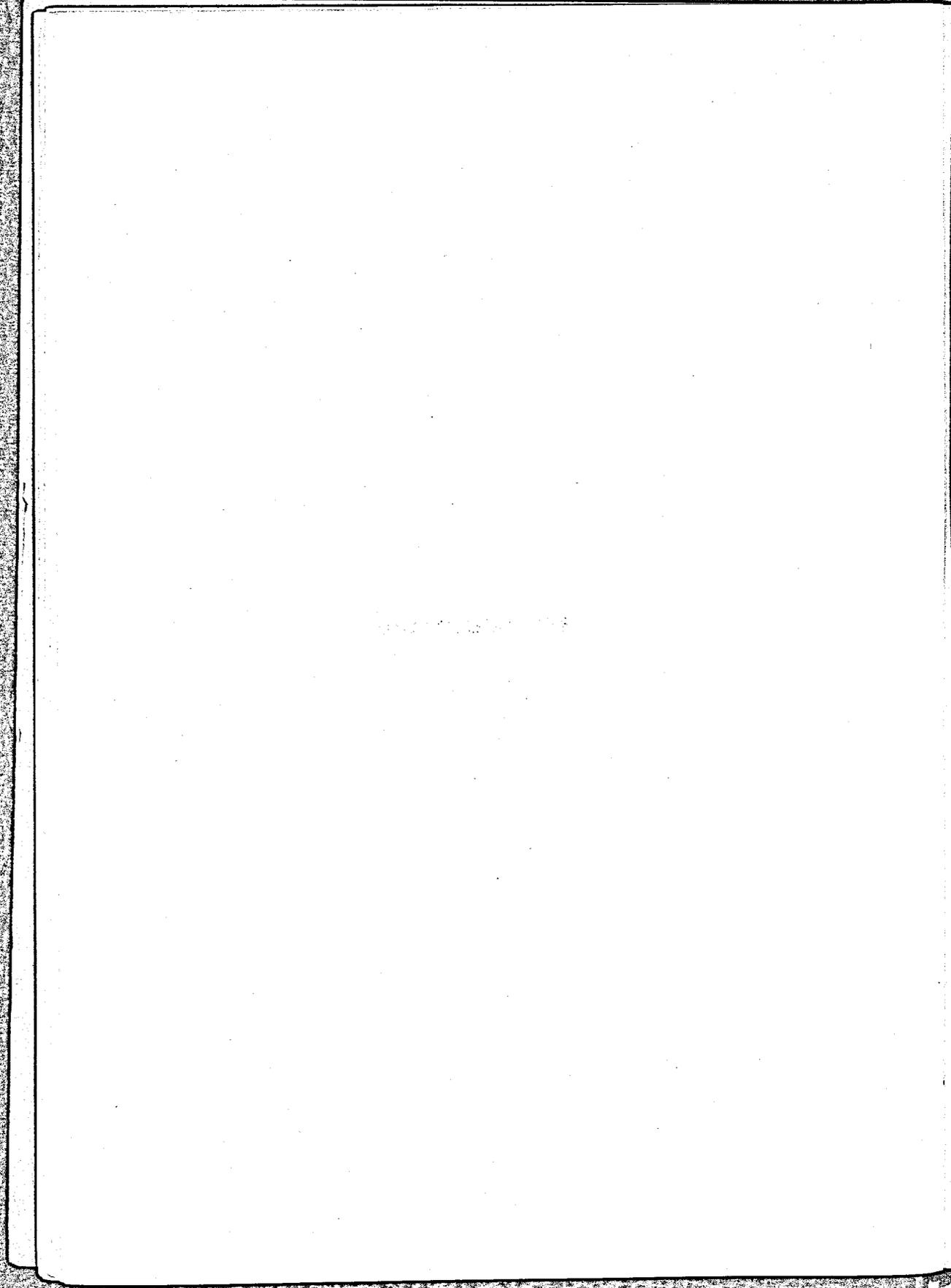
## LIST OF FIGURES

1. The Posting Cycle	7
2. International Certificate Of Vaccinations	14
3. Statement Of Pay And Allowances	17
4. Request To Deposit Cheques	18
5. APRE Information Slips	19
6. Recovery Of Posting Loans	30
7. Application For Posting Loan	31
8. Accounting For Advances	33
9. Selecting A Mover	57
10. Completion Of Inventory Forms	62
11. Shipment Of Automobiles	68
12. Education Allowance Proposal	77
13. Major Areas Of Personal Concern	99
14. Community Profile	118
15. Perception	128
16. Foreign Service Leave/Options	139

## LIST OF TABLES

I	Accumulation Of Foreign Service Premium Points	20
II	Foreign Service Premium	21
III	Post Differential Allowance	22
IV	Salary Equalization And Post Index	25
V	Shelter Cost	46

# **Introduction**



Whether this is your first posting or you are a foreign service veteran, there are probably a hundred questions running through your mind about your new assignment.

Where does one look for the answers? You may already have discovered some of the sources of information available in Ottawa - the Posting Briefing Centre and other sections of the Bureau of Personnel, the Foreign Service Community Association, your collective bargaining unit, your bank and so forth. Overseas, the Head of Mission or post administrative officer can often be very helpful. Or, you may have decided to rely extensively on your own and your friends' experience in helping to find out what you think you need to know.

However you decide to proceed, the key to a healthy and satisfying assignment is awareness and preparedness. This means trying to gain a full appreciation of what you are getting into before you leave. If you are aware of what to expect and prepared to plan and organize your time and actions accordingly, you will be able to anticipate problems before they occur, minimize inconvenience and avoid serious difficulties.

This Handbook is all about awareness and preparedness. It attempts to generate awareness about the conditions and implications of rotational employment in the foreign service. It also tries to help employees and their families prepare for going on a posting and for certain aspects of life outside Canada. It aims to do these things by discussing and illustrating the Foreign Service Directives - the FSDs - and relating them to key events which take place during the posting cycle. At the same time, it draws together under one cover useful information and advice from various sources about a multitude of other topics - from "accommodation" to "zloty" - which are in some way linked to the Directives.

If you do not already have a copy of the FSDs, pick one up from your Assignment Officer or from the Posting Briefing Centre. Later chapters in this Handbook will deal with each of the directives in some detail. For now, try to start thinking about the FSDs in terms of how they will affect your relationship with your employer and your personal lifestyle.

## WHAT ARE THE FSDs? WHY DO WE HAVE THEM?

If factors like standard of living, health care, education, security, quality and costs of goods and services at posts were identical to Canada, chances are the terms and conditions of your employment would be much the same as for other public servants who work in Canada. Unlike your counterparts, you have agreed to serve in foreign environments - dissimilar in varying degrees to Canada - where conditions are often determined by circumstances you and your employer are powerless to change. Because your employer would like you to stay rotational, he is aware that something more than just your pay and usual benefits must be provided. On the one hand, he undertakes to try and minimize or offset the deficiencies you may encounter away from Canada. On the other, he understands that you need various financial and other incentives to serve abroad because even under the most favourable conditions, an employee is bound to make special sacrifices and encounter personal disadvantages.

Your collective bargaining unit and management both recognize the importance that comparability\* and incentive-inducement\* have for maintaining a good working relationship and encouraging employees to serve abroad. However, they are equally aware that these principles are not without limitations. That is why analysis and evaluation of the intent, substance and application of the Directives is an actively ongoing process which culminates every three years in joint consultations with the Treasury Board\* in the National Joint Council\*. Your copy of the FSDs is actually the end-product of these consultations. The statements, procedures, provisions, rules and instructions which form the text are a consensus on the most equitable means of responding to many of the conditions that are unique to rotational employment.

Together with your collective agreement, the FSDs form a contract with your employer which sets the limits on your mutual expectations, responsibilities, obligations and rights. Like any other contract, differences of opinion as to interpretation or application will sometimes occur. If you don't understand something, ask about it. Most conflicts can and should be resolved by obtaining clarification from post administration or from the relevant section in headquarters. (See Appendix B). The Allowance Policy section (APRA) can be consulted in more complex cases. Of course, if you have difficulty with the application or interpretation of a Directive you have the right to present a grievance under the NJC redress procedure. Your collective bargaining unit or the Staff Relations section (APRS) will explain the correct procedure to be followed.

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An explanation of terms denoted by an asterisk (\*) will be found in the Glossary.

## PERSONAL IMPLICATIONS OF ROTATIONAL EMPLOYMENT

While you are in Canada, you are more or less free to do as you wish and socialize with whomever you please outside office hours. Your employer is not going to tell you how to get to work, how to pay your rent, what kind of housing to occupy or when to see the doctor. His legal concern for your dependents extends only as far as your tax withholding status and mandatory health insurance.

The minute you receive notice of assignment, the FSDs come into play and your employer becomes much more involved in your public and private life. To begin with, your dependents figure more prominently in the picture since the employer will assume some responsibility for their welfare when they reside with you at the post or when involuntary separation occurs out of operational necessity. Before your posting arrangements can be finalized, a medical examination (and sometimes a dental examination) will be required in order to ensure that you and your family are in good health. Even before you get to the post, you may discover that you have been assigned a staff-quarter different in size and quality than the house you now occupy. In Ottawa, you take the bus to work but at the post it might be necessary to use a car because local transportation is unavailable, erratic or unsafe. As to socialization after work, you might find that life in a compound, such as exists at a small number of posts, means regularly seeing the same people and sharing the same pastimes.

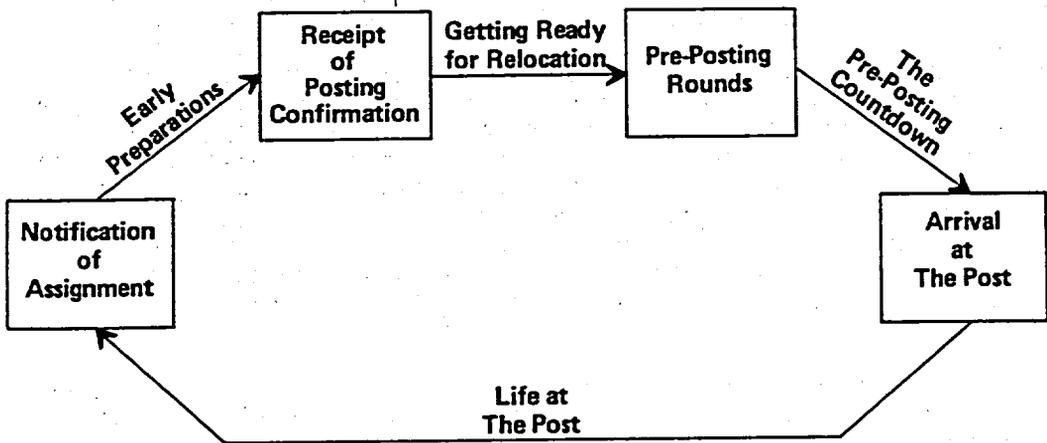
Experienced members of the foreign service community recognize that on any posting they almost always lose some freedom of choice and very often some of their privacy as well. The examples above are but some of the personal implications of rotational employment. It is well known that there are many others including those which affect the spouse and children more profoundly than the employee.

With this in mind, take a good hard look at your situation and discuss it very carefully with your family. There are really no "good posts" or "bad posts". People make a post good or bad for themselves by their ability, or lack thereof, to adapt to different circumstances. The extent to which you and your family are willing and able to adapt will have a considerable bearing on your satisfaction with a career in the foreign service. Above all, know what you are getting into before starting a new assignment because the costs of an aborted posting can have far reaching consequences for your health, welfare and family relationships.

## HOW TO USE THIS HANDBOOK

This Handbook is designed for use by all employees and their families whether in Ottawa or abroad. If you have a spouse and/or older children, share the Handbook with them so that they, too, can gain some idea of what to expect.

Figure 1  
THE POSTING CYCLE



### The Posting Cycle

The "Posting Cycle" illustrated in Figure 1 is a useful way of looking at some of the key events that occur repeatedly in the career of a foreign service employee. Rather than discuss the FSDs in the order that they appear in the Personnel Manual, this Handbook follows the natural sequence of the posting cycle and relates each Directive to a real situation you might find yourself in at any given time. For example, Insurance requirements are discussed in Chapters Two and Three while Claims are discussed in Chapter Four. Organization of topics is based on the personal assumption that "It's never too early to start thinking about how such and such a Directive will affect me and my family". Thus, you will find that topics like the Foreign Service Premium and Salary Equalization are introduced in the chapter entitled "Early Preparations" even though they do not come into play until you actually arrive at the post.

As you go through each chapter, notice that special features have been included to simplify preparation for your new assignment:

**Questions Lists** - help relate the FSDs to your personal circumstances and isolate points for discussion or more specialized guidance;

**Checklists** - clarify your responsibilities, help you plan your time and remind you of things to be taken care of before your departure;

**Illustrations** - such as forms used under the Directives and the recommended way to fill them out;

**Personal Data Worksheets** - help organize a permanent record of critical information e.g. salary, allowances, important addresses, standing instructions, that will be accessible at all times.

In Ottawa, it is suggested that you (and your spouse) read this Handbook before going on pre-posting rounds. Later, the easiest way to use the Handbook is to recognize where you are in your own posting cycle, find the corresponding chapter, check the list of major headings at the beginning and then turn to the appropriate pages in the text. Any time you need quick reference, consult the Subject Index. If you are looking for applications of a specific Directive, you will find that Appendix A - Condensed Foreign Service Directives - is helpful. If you are wondering about which section is responsible for administering a given matter, check Appendix B - Who Does What At Headquarters? There is also a Glossary which explains terms that are not formally defined in the FSDs. These terms are denoted by an asterisk (\*) and are set apart from the main text to avoid losing the gist of the broader topic under discussion. Finally, there is a Selected Bibliography for those who would like to see how other authors have addressed the issues of relocation and life in a foreign environment.

## SOME WORDS OF CAUTION

Whenever you deal with complex subjects in colloquial terms, it is virtually impossible to cover every detail and nuance. This handbook attempts to provide a broad explanation of the FSDs in layman's language rather than "legalese". In an effort to meet the most general concerns of the widest user group, some provisions and guidelines of the Directives have been addressed to a greater extent than others. While the advice herein is as accurate and current as possible, the contents do not have any legal authority whatsoever. Employees are therefore advised to use the handbook in conjunction with the official text of the Directives, Treasury Board Transmittal letters, and related Authorities and not as a substitute.

### Applicable To Divorced Or Legally Separated Employees

Allowances, benefits and entitlements normally authorized for accompanied employees and their dependents may be very limited or not applicable in cases where family members are living apart either voluntarily or pursuant to Court-imposed arrangements. Employees in this situation are advised to seek special counselling from their Assignment Officer and the relevant Headquarters sections prior to departure.

### Definitions

Except where otherwise stated, the definitions in FSD 2 apply to this Handbook. For the sake of editorial clarity the term "Ottawa", as it applies to Career Foreign Service Employees, is synonymous with "headquarters" as defined in FSD 2.01(p).

### Use of Figures and Tables

Certain charts and tabulated data found in the Directives have been reproduced herein to provide continuity. Other illustrations have been created to consolidate information, provide examples and facilitate understanding. Employees should note that the dollar amounts used will change periodically. The Schedule to Foreign Service Directives and Meal Rates, published monthly, should be consulted for up to date information.

### Perpetuity

This Handbook is an experiment in enhanced communication. The Department intends to review its contents as experience with the new Directives unfolds and to publish an updated version. Employees and their spouses are invited to send their suggestions to the Staff Relations and Compensation Division (APR).

# **Chapter One**

## **Early Preparations**

## CHAPTER OUTLINE

	Page
1.1 Notice of Assignment	11
1.2 Role of the Posting-Briefing Centre	12
1.3 Pre-Posting Medical and Dental Examinations (FSD 9)	13
1.4 Pre-Posting Administrative Briefing	15
1.5 Pay, Allowances and Leave	16
1.5.1 How You Are Paid	16
1.5.2 Foreign Service Premium (FSD 56)	20
1.5.3 Post Differential Allowance (FSD 58)	22
1.5.4 Foreign Language Allowance (FSD 59)	23
1.5.5 Post Index and Salary Equalization Adjustment (FSD 55)	24
1.5.6 Leave Entitlements (FSD 44, 45, 47, 48)	26
1.6 Loans and Accountable Advances	27
1.6.1 Posting Loans (FSD 10)	27
1.6.2 Accountable Advances (FSD 4)	32
1.7 Personal Mailing Privileges	34
1.7.1 Applicable To All Posts	34
1.7.2 Applicable to Privileged Posts Only	35
1.7.3 Caution	37
1.8 Personal Welfare Counselling and Assistance	39

## 1.1 NOTICE OF ASSIGNMENT

After much anticipation, the day has finally come for your assignment officer to inform you where and when you are to be posted. (The timing of your departure may be several months in the future). It is a good idea to examine that post from all the original points of view. You might:

- Review the Post Report\* and Post Educational Facilities Report\*
- Get information from the local Consulate or Embassy of the country in which the post is located
- Talk to someone who has served at that post
- Scan the FSDs, check which ones apply and to what extent

At this stage, you should be identifying the main areas of personal concern about your posting. Some typical questions which come up are:

- What kind of accommodation will I occupy?
- What personal effects should I take with me? What should I dispose of or leave behind?
- Will I need a car to get around?
- Where will my children be attending school?
- Will my spouse be able to work?
- What are the health conditions and recreational opportunities like at the post?
- Will I take any leave en route or after my arrival?
- What happens if an emergency comes up while I'm overseas?
- How much money will I need to see me through removal?

Try to ponder these and other questions as best you can from the information already at your disposal. Take note of any points which arise that you will want to clarify during later briefings or appointments with the responsible section in headquarters.

## 1.2 ROLE OF THE POSTING-BRIEFING CENTRE

There's a comfortable, quiet and spacious salon located adjacent to the Passport Office on the main floor of the Lester B. Pearson Building. This is the Posting-Briefing Centre (APOB), the logical place for you and your spouse to begin your preparations. (Spouses are welcome to contact APOB directly). It offers a wealth of resources through the following services:

### Information

- Post Reports, Educational Facilities and Medical Reports
- Special Surveys, e.g. Opportunities for Spouses;
- Specific Country Information on living conditions abroad including books, magazines, pamphlets, guides, maps and reprints
- Audio-Visual Image: Slides, photographs, videotaped personal impressions of returnees, and Cultural Adaptation\* films.

### Workshops and Briefings on Cultural Elements

- Calendar of Activities is published listing briefings and programs offered during the posting season (March to July)
- Spouse briefings
- Geographical Area Workshops
- Speakers from Area Desks, foreign embassies and the private sector

### Foreign Language Training

- Individual programs designed and set up based on needs identified by the assignment officer

### Administrative Arrangements for Pre-Posting

- Appointments for medical examinations
- Pre-Posting Administrative Briefings
- Personal Interview to issue pre-posting kits and schedule rounds.

Even if you are not expected to leave for several months, it is very important that you see APOB now in order to get administrative arrangements under way. In this regard, bear in mind that medical fitness for service abroad is a pre-requisite to having your posting officially confirmed. Medical requirements often take four weeks or longer to complete. You will not be able to obtain loans, advances or complete your travel arrangements until you and your accompanying dependents are given a clean bill of health.

### 1.3 PRE-POSTING MEDICAL AND DENTAL EXAMINATIONS

FSD 9 obliges you and those dependents who will reside with you or study full-time outside Canada to have a medical and possibly a dental examination as a condition of pre-posting or cross-posting. A complete examination may include X-rays, blood tests, immunization, psychological assessment and consultations with a specialist.

The phrase "through preventive services" in the introduction to FSD 9 means that your employer relies on the Medical Profession to advise him of your health profile and the degree of risk associated with sending you to a given post. Whenever possible, medical examinations and related procedures are administered by Health and Welfare Canada. In Ottawa, their clinic is located on the ground floor of the Bonaventure Building, 301 Elgin Street. Where Health and Welfare Canada doctors are not available, competent private facilities can be substituted. The Health Plans Unit in APRO will provide advice about any other situation where the use of private facilities rather than Health and Welfare Canada may be authorized.

The costs of FSD 9 pre-posting medical and dental examinations are borne by your employer. However, payment for any treatment that may be required, including dental work, is entirely your responsibility. You are considered to be "at work" when taking medical or dental examinations and may be entitled to compensation if they have to be done outside working hours. If necessary, you will be given time off for travel to and from the place of examination and be reimbursed for travelling expenses.

#### Immunizations

Based on the country to which you are posted, it is likely that you and your family will receive immunization against one or several of the following:

- typhoid
- tetanus
- diphtheria
- polio
- hepatitis (gamma-globulin)
- cholera
- yellow fever

The clinician responsible for your immunizations will record the particulars in an International Certificate of Vaccinations booklet. (See Figure 2). Keep this booklet with your passports as you may be required to present it on entry to foreign countries or return to Canada.

Hint - Now is the time to get some professional health information about conditions at the post. Many of the HWC doctors have themselves been posted to unhealthy places and are more than willing to share their expertise.

Hint - Do you have a record of yours and your family's vaccinations against measles, mumps, diphtheria? Check the need for any of these with the examining physician and/or your family doctor/pediatrician.

Hint - Will you need any prescription drugs at the post? Ask the HWC doctor about their availability. Include copies of your prescriptions with the important papers you will be taking along. Perhaps a letter summarizing or enclosing your medical history can be prepared by your family doctor.

Note - The pre-posting medical does not include a specialist eye examination. Take an extra pair of corrective lenses to the post for each family member needing them. Keep copies of your lens prescriptions. Consider prescription sun-glasses if you are going to the tropics.

## FIGURE 2

### INTERNATIONAL CERTIFICATE OF VACCINATIONS



Health and Welfare Canada Santé et Bien-être social Canada

### INTERNATIONAL CERTIFICATES OF VACCINATION INTERNATIONAL HEALTH REGULATIONS

### CERTIFICATS INTERNATIONAUX DE VACCINATION RÈGLEMENTS SANITAIRES INTERNATIONAUX

Issued by: Health and Welfare Canada Medical Services

Délivré par: Santé et Bien-être social Canada Services médicaux

#### 1.4 PRE-POSTING ADMINISTRATIVE BRIEFING

About the same time as you get your medical examination appointment, you and your spouse will be invited to attend a special group meeting in APOB. At this pre-posting administrative briefing, representatives from various headquarters sections and others will be in attendance to give you important information and answer some of your basic questions about preparing for a posting. Some of the areas typically covered are:

- Accommodation abroad; Shelter Costs (FSD 25)
- Electrical appliances at the post
- Mailing privileges
- Management of money abroad (Bank representative)
- Medical benefits (FSD 38-42)
- Packing, shipment and storage of personal effects (FSD 15)
- Personal welfare counselling
- Preparation of Inventories; Insurance; Damage Claims (FSD 15)
- Salary; Allowance entitlements (FSD 55, 56, 58, 59)
- Shipment of automobiles (FSD 15)
- Travel arrangements; Living expenses during Removal (FSD 15)
- Travel and Leave benefits (FSD 44, 45, 47, 50, 51, 54)

One of the reasons why it is important for you to attend this briefing is because the information you get will help you to identify your needs and personal questions to ask during Pre-Posting Rounds. To get the most out of the Briefing, go through the FSDs mentioned above before you attend.

## 1.5 PAY, ALLOWANCES AND LEAVE

### 1.5.1 HOW ARE YOU PAID

APRE is the section in headquarters that is responsible for pay and allowance administration. Your salary cheques and pay stubs are actually prepared by the Department of Supply and Services (DSS) and then sent to External Affairs for distribution. Allowances are deposited directly to your account by DSS.

When you join the foreign service, DSS is given basic data concerning your salary level, tax-withholding status and check-offs. Any alterations to your deductions caused by changes in your classification or family composition are similarly provided. Salary revisions arising from contract settlements are dealt with automatically by DSS and are normally reflected in your pay cheque within two months. The awarding of Acting Pay and Performance Pay is a more time-consuming process because authorization must first come from the Personnel Operations Division (APO) before APRE can requisition a cheque from DSS.

Before you begin your posting, APRE will give you an EXT 30 - Statement of Pay and Allowances - which has been completed according to your entitlements at that time. (See Figure 3). Keep this form in a safe place or transfer the information thereon to the Personal Worksheet found in Appendix F to this Handbook.

While you are abroad, your pay and allowances will be deposited into the bank account you have designated for that purpose. (See Figure 4 - Form EXT 271 Request to Deposit Cheques(s) ). Salary is deposited every two weeks and allowances monthly. Supplementary cheques are deposited when received. Deposits are generally made "by hand" to banks in central Hull and Ottawa and mailed to outlying branches. Cheque stubs, Allowance Information statements and duplicate copies of bank deposit slips (See Figure 5) are normally sent to posts once a month for distribution. When you examine these forms, take note that Posting loans are recovered from your salary while items like Shelter Cost and Security Deposit advances are payable separately or recovered in cash.

Three of the FSDs provide benefits based wholly or partially on the incentive-inducement principle. These are the Foreign Service Premium (FSD56), the Post Differential Allowance (FSD58) and the Foreign Language Allowance (FSD59). The Foreign Service Premium and Post Differential Allowance are payable for the duration of your overseas assignment but payments may cease or be modified by temporary absences from duty or changes in the size of your family at the post. You and your post administration have the joint responsibility to keep APRE informed of any prolonged absences or changes in family status. This should ensure that you continue to receive the proper amount each month and are not inconvenienced by your employer's need to recover any overpayments.

FIGURE 3  
STATEMENT OF PAY AND ALLOWANCES

STATEMENT OF PAY AND ALLOWANCES - ÉTAT DE LA RÉMUNÉRATION ET DES ALLOCATIONS  
FOREIGN SERVICE FOREIGN SERVICE  
(subject to change) (pour être modifié)

Name of employee / Nom de l'employé		Effective date of posting / Date d'entrée en vigueur de l'affectation
John W. Doe		June 1, 1982
Posted from / Affectation de	Posted to / Affectation à	Public service classification / Classification de la fonction publique
Ottawa	Havana	FS 1

A ANNUAL SALARY / TRAITEMENT ANNUEL	<u>\$32,574</u>	
B POST INDEX (PI) / INDICE DE LA MISSION (IM)	<u>140</u>	
C POINTS (FSD 3604) / MARQUES (DSE 3604)	<u>75</u>	(NON-ACCOMPAGNE/E ) (UNACCOMPANIED )
D BASIC PREMIUM (BP) / PRIME DE BASE (PB)	<u>8327.00</u>	(ACCOMPAGNE/E 2 ) (ACCOMPANIED BY )
E SALARY EQUALIZATION FACTOR (FSD 55) .55 UP TO 34999 PÉRÉQUATION DU TRAITEMENT (DSE 55) .50 / 35000 AND UP	SALARY x $\frac{.55 \times (P.1. - 100)}{100}$	(+) <u>7166.28</u> (-)
F FOREIGN SERVICE PREMIUM (FSD 56) PRIME DE SERVICE EXTÉRIEUR (DSE 56)		<u>8327.00</u>
G POST DIFFERENTIAL ALLOWANCE (FSD 58) / INDEMNITÉ DIFFÉRENTIELLE DE MISSION (DSE 58)		<u>3600.00</u>

TOTAL PER ANNUM / TOTAL ANNUEL : \$ 19,093.28

TOTAL PER MONTH / TOTAL MENSUEL : \$ 1,591.11

APRE/TEL:

\_\_\_\_\_  
Date

\_\_\_\_\_  
Completed by / Rempli par

**FIGURE 4**  
**REQUEST TO DEPOSIT CHEQUES**

**REQUEST TO DEPOSIT CHEQUE(S)**  
**DEMANDE DE DÉPÔT DE CHEQUE(S)**

To  
A APRE

From  
De

Name/Nom John W. Doe	Classification ES 1
-------------------------	------------------------

Would you please arrange to deposit my cheque(s) to:  
Prérez de déposer mes chèques à:

Name and Address of Bank/Nom et adresse de la banque		Account No./N° de compte: 25983
Name/Nom Royal Bank	Street/Rue L.B. Pearson Bldg., 125 Sussex Drive	Personal Chequing <input checked="" type="checkbox"/> Compte de chèques personnels
City/Ville Ottawa	Province Ontario	True Chequing <input type="checkbox"/> Compte de chèques véritables
		Savings <input type="checkbox"/> Compte d'épargne
		Current <input type="checkbox"/> Compte courant

**REASON - RAISON**

Posted to Havana Seconded to \_\_\_\_\_  
Muni à Havana Détaché auprès de \_\_\_\_\_

On Leave  Period from \_\_\_\_\_ To \_\_\_\_\_  
En congé Période allant de \_\_\_\_\_ à \_\_\_\_\_

Deposit slip should be sent to:  
Prérez d'envoyer le bordereau à:

Canadian Embassy Havana  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Date Signature

FIGURE 5

APRE INFORMATION SLIPS

ALLOWANCES PAYLIST - FEUILLE D'INDEMNITÉS									
1	2	3	4	5	6	7	8	9	10
NAME / NOM	B.S. BASIC/PREMUM BASE/PRISE	BILL NO. / NO. DE PRIN. QUATION	POST CODE / CODE DE POSTE	LANG. A CON LEAVE LANGUES / CODES DE RETENUE	MISC. OTHERS	TOTAL	DEDUCTIONS / RÉDUCTIONS	TOTAL DEDUCTIONS / RÉDUCTIONS TOTALES	NET PAYMENT / PAIEMENT NET
John W. Doe	693.92	597.19	300.00			1591.11			1591.11

6511

F.G.-629

John W. Doe (Havana)

Royal Bank  
L.B. Pearson Bldg.,  
125 Sussex Drive

ACCT. No. 25983

AMOUNT/MONTANT

\$763.89

Salary cheque

DATE FORWARDED EXPÉDIÉ LE	D/J	M/M	Y/A
	1	6	82

DEPOSITED BY                      DÉPOSÉ PAR  
Department of                      Ministère des  
External Affairs                      Affaires extérieures  
Ottawa, Canada

EXT 577 (12/73)

### 1.5.2 FOREIGN SERVICE PREMIUM

The Foreign Service Premium (FSP) - FSD56 - is the major incentive provided by your employer to persuade you to work abroad. It is a tax-free allowance\* which varies according to your salary, family configuration and the length of your service outside Canada. Table II shows the FSP payable to employees from April 1, 1982.

Progression from Step to Step in the FSP Table depends on the number of "points" you have accumulated for service abroad. (See Table I). As long as you remain in the foreign service, your points carry over from post to post and do not lapse. You now earn one point per month of service. However, if you worked at a Hardship Post between July 1, 1975 and April 1, 1979 you would have earned points at an accelerated rate. Check with APRE if you are uncertain as to the number of points you have already earned or how many you need to advance to the next Step.

TABLE I

#### ACCUMULATION OF FSP POINTS

<u>Level of Post (See 1.5.3)</u>	<u>Points Per Month of Service</u>		
	<u>Before 1/7/75</u>	<u>1/7/75 to 31/3/79</u>	<u>Since 1/4/79</u>
A (Non-hardship)	1.00	1.00	1.00
I	1.00	1.25	1.00
II	1.00	1.25	1.00
III	1.00	1.50	1.00
IV	1.00	1.50	1.00

Under the 1979 Directives, the FSP was adjusted by the Post Index. This tended to considerably reduce the Premium's incentive value for many employees, particularly those at low index/high hardship posts. The new Directives drop the relationship between the FSP and the Post Index. This is based on the principle that the amount of FSP payable should be the same for all employees in accordance with the Table. In subsequent years, the value of the FSP will be maintained by adjusting the Table each April 1 to reflect the average percentage increase in public service salaries at large during the preceding calendar year. Special transitional arrangements exist for employees already serving at high-index posts on April 1, 1982.

**TABLE II**  
**FOREIGN SERVICE PREMIUM**

UNACCOMPANIED/NON ACCOMPAGNÉ

SALARY RANGE/FOURCHETTE DE RÉMUNÉRATION	STEPS/ÉCHELONS				
	I	II	III	IV	V
	(0-23)	(24-59)	(60-95)	(96-131)	(132+)
up to \$19,999/jusqu'à \$19,999	2165	3248	4330	4763	5196
\$20,000 to/à \$29,999	2273	3410	4547	5001	5456
\$30,000 to/à \$39,999	2382	3573	4763	5239	5716
\$40,000 to/à \$49,999	2490	3735	4980	5477	5975
\$50,000 and over/et plus	2598	3898	5196	5716	6235

ACCOMPANIED BY ONE DEPENDANT/  
ACCOMPAGNÉ D'UNE PERSONNE À CHARGE

SALARY RANGE/FOURCHETTE DE RÉMUNÉRATION	STEPS/ÉCHELONS				
	I	II	III	IV	V
	(0-23)	(24-59)	(60-95)	(96-131)	(132+)
up to \$19,999/jusqu'à \$19,999	2977	4466	5954	6549	7145
\$20,000 to/à \$29,999	3126	4689	6252	6782	7502
\$30,000 to/à \$39,999	3275	4913	6549	7105	7860
\$40,000 to/à \$49,999	3424	5136	6847	7428	8217
\$50,000 and over/et plus	3572	5359	7145	7751	8574

ACCOMPANIED BY TWO OR MORE DEPENDANTS/  
ACCOMPAGNÉ D'AU MOINS DEUX PERSONNES À CHARGE

SALARY RANGE/FOURCHETTE DE RÉMUNÉRATION	STEPS/ÉCHELONS				
	I	II	III	IV	V
	(0-23)	(24-59)	(60-95)	(96-131)	(132+)
up to \$19,999/jusqu'à \$19,999	3653	5480	7306	8037	8767
\$20,000 to/à \$29,999	3836	5754	7671	8439	9205
\$30,000 to/à \$39,999	4018	6028	8037	8841	9644
\$40,000 to/à \$49,999	4201	6302	8402	9243	10082
\$50,000 and over/et plus	4384	6576	8767	9644	10520

### 1.5.3 POST DIFFERENTIAL ALLOWANCE

The tax-free Post Differential Allowance (PDA) - FSD58 - is designed to encourage you to serve at Hardship Posts. It provides you with monetary compensation for undesirable local conditions which, for the most part, cannot be alleviated. After 24 months of continuous service at one or more Hardship posts, you are entitled to begin receiving a 50% increase in the applicable PDA.

Every so often, Posts are asked to complete a special Rating Form which allows "hardships" to be described in terms of Isolation, Local Conditions, Climate and Environment, Health, Medical Care, Violence and Hostility. These forms are then sent to Ottawa where they are carefully assessed by an Interdepartmental Hardship Posts committee. Based on relative numerical ratings, posts are designated in one of four hardship levels - Level I indicating the least significant hardship and Level IV the most difficult. (Non-hardship posts are referred to as A-level posts.) A complete and up to date listing of hardship posts is contained in the Schedules To Foreign Service Directives And Meal Rates, revised and distributed monthly by APRA.

Table III shows how the PDA varies according to family size and post hardship level. Like the Foreign Service Premium, the PDA Table will be updated each year to reflect changes in public service salaries.

TABLE III  
POST DIFFERENTIAL ALLOWANCE

<u>Family Configuration</u>	<u>Level of Hardship</u>			
	I	II	III	IV
Unaccompanied	1200	1800	2400	3600
Accompanied by 1 Dependent	1500	2250	3000	4500
Accompanied by 2 or more Dependents	1800	2700	3600	5400

#### 1.5.4 FOREIGN LANGUAGE ALLOWANCE

Employees who are required to learn and/or use a foreign language at their posts may be eligible to receive a nominal allowance under FSD 59. By "foreign", the Directive refers to any language other than English, French or your mother tongue.

Languages are grouped into four categories ranging from those which are comparatively easy to acquire (for example, Dutch, Spanish) to those which are very difficult (such as Arabic and Japanese). There are two levels of proficiency for each language and you will be required to attain at least the lower level in order to qualify for an allowance. You may receive foreign language allowance at one level of proficiency while studying to attain the higher level in the same language. If you need more than one foreign language for your duties, you are entitled to receive an allowance for one language while studying to attain proficiency in the other.

Foreign language allowances are paid monthly and are subject to income tax. It should be pointed out that the objectives and requirements for a Foreign Language Allowance are being reviewed with the result that FSD 59 may shortly be modified or eliminated.

### 1.5.5 POST INDEX AND SALARY EQUALIZATION

Before you review FSD 55, take a moment or two and try the following mini-quiz. Look at each statement and circle what you believe to be the correct choice:

1. Salary equalization is an allowance designed to keep my purchasing power constant in the country where I am posted      TRUE      FALSE
2. The Post Index is an incentive to serve abroad and to maintain my personal standard of living      TRUE      FALSE
3. Cost of Living Surveys and patterns of purchasing at the post do not affect the calculation of the Post Index      TRUE      FALSE
4. Devaluations or revaluations of local currency are always matched by increases or decreases in the Post Index      TRUE      FALSE
5. Our post index system is probably the most responsive of any foreign service in the world.      TRUE      FALSE

If you answered "TRUE" to any of items 1-4 you might find it valuable to consult Circular Document Admin. No. 26/79 entitled The Post Index and the Cost of Living at Home and Abroad. This document, while somewhat complex, is available from your post administrative officer or from APRA.

Now have a good look at FSD 55. Do you see any reference to the terms "allowance", "incentive" or "constant purchasing power"? The commonest misconception about this Directive is that Salary Equalization is an allowance like the Foreign Service Premium or the Post Differential Allowance. In reality, it is an adjustment to your disposable income designed to maintain your purchasing power at more or less the same level as that of your counterpart in Ottawa. It is not intended to shelter you from the effects of inflation in Canada or to keep your purchasing power at the same level as when you arrived at the post.

The Post Index is simply a number which indicates the relationship between retail prices paid by an "average" employee at a post abroad for a specific basket of goods and services relative to retail prices for the same goods and services in Ottawa. Price levels in Ottawa are deemed to be constant at 100. Therefore, if the post index is 120,

this indicates that retail prices for those goods and services are about 20% higher for the "average" employee at the Post than in Ottawa.

Your actual salary at the commencement of your posting is used to determine the percentage of your salary which will be indexed for the duration of that posting. For employees earning less than \$35,000, disposable income is considered to be 55% of salary; for those earning more, disposable income is considered to be 50%. Salary Equalization is calculated by applying the post index to your disposable income and is paid on a monthly basis. Table IV shows some examples of how the amount of Salary Equalization may change if the post index goes up or down. No payments or recoveries are made when the post index is 100 or less.

TABLE IV  
SALARY EQUALIZATION AND POST INDEX

<u>Annual Salary</u>	<u>Disposable Income</u>	Monthly Salary Equalization Payable when Post Index is			
		<u>150</u>	<u>125</u>	<u>110</u>	<u>100 or less</u>
\$20,000	11,000	458.33	229.16	91.66	0
\$30,000	16,500	687.50	343.75	137.50	0
\$40,000	20,000	833.33	416.67	166.67	0

Note: The important thing to remember is that Salary Equalization is not a constant amount and will be adjusted upward or downward depending on relative changes in the Post Index.

The Post Index is established by Statistics Canada on the basis of cost-of-living surveys conducted by posts. All post indexes are reviewed monthly and any changes which may be warranted on the basis of information from a variety of other sources, (including indexes generated by other countries), are reported to the Department. Statistics Canada is solely responsible for administering the post index methodology as agreed to in the National Joint Council Committee on the Foreign Service Directives. Any adjustments in the level of a post index following a review are implemented on the first day of the month following the month in which the review was completed.

Whether or not our post index system is the most responsive of any foreign service in the world is, of course, a debatable matter. To be sure, Statistics Canada has consistently employed objective methodology in a timely fashion and provisions have been made for conducting special reviews following reports of exceptional developments received from posts. Nevertheless, the National Joint Council is committed to a full scale review of the post index system and will be considering options such as the one proposed in the Report of the Royal Commission on Conditions of Foreign Service\*.

### 1.5.6 LEAVE ENTITLEMENTS

APRE (in Ottawa) and Post Administration (abroad) are responsible for keeping accurate records of your leave entitlements. This is normally done on a special card known as an ALOSS (Attendance, Leave, Overtime and Shiftwork System). Whenever you are transferred, your ALOSS follows you from one assignment to the next.

FSD 44 - Holidays - ensures that you get the same number of statutory holidays abroad as you would be entitled to in Canada. However, it allows for the substitution of local holidays in accordance with the traditions or customs of the host country.

FSD 45 has been revised under the 1982 Directives and is now known as Foreign Service Leave. In addition to leave entitlements under your collective agreement or compensation plan, Foreign Service Leave gives you an extra ten days of leave each year as a premium for service abroad. This leave may be used in three different ways:

- (1) taken at any time or carried over from year to year,
- (2) accrued credits may be cashed in, in part or in full, once per fiscal year on the basis of your salary on the previous March 31, or
- (3) anytime you are abroad, ten days of accrued leave may be traded in exchange for a transportation expense benefit up to the cost of one adult return air economy ticket between your post and Ottawa

FSD 47 - Leave for Post-Attributable Injury and Illness - authorizes you to be absent if you receive an injury or contract a disease under circumstances which would not normally occur in Canada. No charge to your regular sick leave or other leave credits is made when you are authorized to take leave under this Directive.

FSD 48 provides authority for Special Leave beyond the entitlement in your collective agreement. The basis for this Directive is that a given situation may pose more personal hardship for an employee working abroad as opposed to his or her counterpart in Canada. A limit of eight days of leave may be extended in respect of any one circumstance. Responsibility for authorization of special leave presently rests with APRS.

Chapter Four of this Handbook deals further with some of your Leave options while you are at the Post. It also describes your related travel entitlements under FSD 50 - Foreign Service Travel Assistance - and other Directives designed to cover special circumstances.

## 1.6 LOANS AND ACCOUNTABLE ADVANCES

### 1.6.1 POSTING LOANS

Moving abroad can involve pretty hefty cash outlays for various items you will need during the course of your posting. FSD 10 recognizes this by making provision for you to obtain substantial loans at concessional interest rates.

#### Maximum Amount of Loan

Under the 1979 Directives, a Posting Loan of three to four thousand dollars was available depending on your family status. It was also possible to get an Automobile Loan of up to twenty-six hundred dollars.

There is no longer a distinction between automobiles and any other items you may wish to purchase. As of April 1, 1982, the maximum amount you may borrow is \$15,000 or one-half your basic annual salary, whichever is less. You are entitled to apply for a second loan during your posting but only up to the maximum amount less any unpaid balance on the original Posting loan. In subsequent years, the ceiling will be adjusted by the average percentage increase in Public Service contract settlements.

#### Calculation Of Interest\*

At the beginning of every Quarter in the Fiscal Year (the first day of April, July, October and January), an interest rate is prescribed by the Department of Finance for 90-Day Treasury Bills. This is the same rate you will be charged if you take out a posting loan. It is generally more preferential than rates charged by commercial banks and lending institutions, often as much a 4% lower than their rates for unsecured loans. In fact, this rate is the lowest that can be offered without creating a taxable benefit for the borrower.

Whatever the Quarterly interest rate is at the time your loan is actioned, it remains fixed until the loan is repaid or renegotiated. Should interest rates decline, you have the option once during the repayment period to request that the outstanding balance be recalculated using the Quarterly rate in effect at that time. Similarly, if you obtain a second loan during your posting, the prevailing interest rate would be applied to the total amount of the new loan and outstanding balance of the original.

Another feature is that interest is not charged until the first day of the month in which recovery begins. In effect, this means that your posting loan is interest-free for up to four months. To get the most from this benefit, try to arrange for your loan to be issued as early in the month as possible.

Note - In the case of a renegotiated or second loan, the new interest rate is applied from the first day of the month following the month in which the loan is granted.

## Repayment

Recovery of your posting loan starts in the fourth month following the month in which the loan is made. It is done through equal installments automatically deducted from your paycheck each month for the expected duration of your posting. You are, of course, free to repay the principal amount in full, without interest, before recovery commences. After recovery has started, you may renegotiate your loan once during the repayment period by making a full or partial lump sum payment. Should you cease employment before repayment is completed, your employer is entitled to recover the balance at once. Figure 6 gives a synopsis of how posting loans are recovered and shows how the number and dollar amount of monthly deductions are affected by when you apply.

## How To Apply

Applications for posting loans are submitted to the Loans Officer in APRA on form FS 10. A completed sample is illustrated in Figure 7. These forms are available from APOB or the post administrative officer. Providing they have a copy of your Posting Confirmation, your application can be dealt with as early as three months before departure. You may, of course, apply at any time during your posting but you should be aware that the loan must be repaid by the end of your posting. It normally takes 2-3 weeks before a cheque is issued or deposited into your bank account. The Loans Officer will advise you in writing of the exact recovery terms and conditions, i.e. total cost, interest rate, number and dollar amount of monthly payments.

## Should I Borrow? If So, How Much?

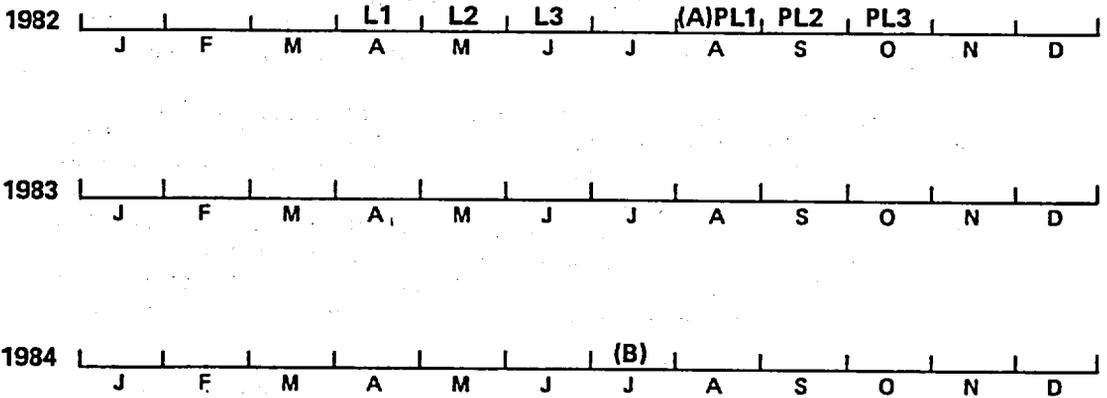
There are no simple answers to these very personal questions. Some people will tell you to borrow as much money as you can afford to repay. Others will advise you to borrow only the minimum you need, if you really have to borrow at all. Still others shun borrowing like they would the plague.

You are under absolutely no obligation to take out a posting loan. If you do decide to borrow, how you choose to spend the loan money is entirely your own concern. But be prepared to make some realistic decisions, do some careful planning and, if necessary, get help from the Department's Financial Counsellor in APRA, your banker or your accountant in order to find out what is a reasonable amount. For starters, though, you might like to go through the steps below and use the worksheets in Appendix C for your reckoning:

1. Make a list of the items you think you would like to acquire and how much they cost; distinguish between those you really need and those you would like to have; try to attach some priorities to your list.
2. Review your present financial situation. Take particular note of your spending patterns. Are you over-extending yourself financially? Are you now in a situation where the total monthly payment on your debts is cutting into your very basic needs?
3. Work out a budget for your income and expenses at the post, keeping in mind that your spending pattern may differ from that in Ottawa. For example, you may spend more on vacations to take advantage of the place of your assignment. Remember to include allowances, salary equalization and to eliminate any income that will stop coming in when you leave your present location. (Remember Salary Equalization is not constant.) Make provision for savings, emergencies and expenses not covered by the FSDs.
4. Determine how much income is left over for allocation to repayment of a loan. Based on that, it is possible to figure out roughly how much of a loan you can afford.

FIGURE 6

RECOVERY OF POSTING LOANS



Amount of Loan Requested \$10,500  
 Interest Rate 1/4/82 - 30/6/82 14.42%

In this illustration, an employee arrives at the post during August, 1982 (A) and his or her assignment is due to be completed during July, 1984 (B). The number and dollar amount of monthly payments is a function of when the loan is issued:

<u>Loan Issued</u>	<u>First Payment</u>	<u>Last Payment</u>	<u>Number of Payments</u>	<u>Amount of Each Payment</u>
Apr/82 (L1)	Aug/82 (PL1)	Jul/84	24	506.43
May/82 (L2)	Sep/82 (PL2)	Jul/84	23	525.43
Jun/82 (L3)	Oct/82 (PL3)	Jul/84	22	546.18

FIGURE 7

APPLICATION FOR POSTING LOAN



APPLICATION FOR LOAN  
FOREIGN SERVICE

DEPARTMENT <b>EXTERNAL AFFAIRS</b>		FILE NO.	
NAME OF EMPLOYEE <b>JOHN W. DOE</b>		FINANCIAL CODING	
SOCIAL INSURANCE NUMBER <b>429-239-749</b>		PROGRAM NO.	
NUMBER OF ACCOMPANYING DEPENDANTS <b>2</b>		RESPONSIBILITY UNIT NO.	
		CODE VOTE	
		STANDARD OBJECT	
		LINE OBJECT	
INFORMATION ON POSTING			
POSTED FROM <b>OTTAWA</b>	POSTED TO <b>PETROVIA</b>	DATE NOTIFIED <b>15 APRIL 1982</b>	DATE EFFECTIVE

A. POSTING LOAN ACCORDING TO THE TERMS SPECIFIED IN DIRECTIVE 10

TO BE COMPLETED BY APPLICANT	FOR DEPARTMENTAL USE
AMOUNT REQUESTED ..... \$ <b>10,500.00</b>	UNPAID BALANCE OF PREVIOUS LOAN ..... \$ <b>NIL</b>
DATE LOAN TO BE AVAILABLE <b>ASAP</b>	REQUESTED LOAN ..... \$ <b>10,500.00</b>
DURATION OF LOAN (NOT EXCEEDING 48 MONTHS) <b>22</b>	LOAN GRANTED ..... \$ <b>10,500.00</b>
I HEREBY APPLY FOR A POSTING LOAN UNDER THE TERMS OF DIRECTIVE 10 AND AT THE INTEREST RATE SPECIFIED ON THIS FORM. I CERTIFY THAT SUCH LOAN WILL ONLY BE USED TO PURCHASE ITEMS FOR USE AT MY POST. I ACKNOWLEDGE THAT I MAY BE REQUIRED TO PRESENT RECEIPTS. I AGREE TO REPAY ANY OUTSTANDING BALANCE SHOULD I SEPARATE FROM THE PUBLIC SERVICE.  <b>SAMPLE COPY</b>	EFFECTIVE DATE OF LOAN <b>APRIL 2, 1982</b>
	DURATION OF LOAN <b>22 MONTHS</b>
	RATE OF INTEREST <b>14.46%</b>
	MONTHLY INSTALMENT <b>\$ 546.18</b>
	DATE OF FIRST INSTALMENT <b>1 AUGUST 1982</b>
	DATE OF FINAL INSTALMENT <b>31 MAY, 1984</b>
SIGNATURE OF APPLICANT <i>[Signature]</i> <b>April, 1982</b> DATE	APPROVAL <i>[Signature]</i> <b>SAMPLE COPY</b> <b>April 2, 1982</b> DATE
	FOR THE DEPUTY HEAD

B. AUTOMOBILE POSTING LOAN ACCORDING TO THE TERMS SPECIFIED IN DIRECTIVE 11

TO BE COMPLETED BY APPLICANT	FOR DEPARTMENTAL USE
AMOUNT REQUESTED \$	LOAN GRANTED \$
DATE LOAN TO BE AVAILABLE	EFFECTIVE DATE OF LOAN
DURATION OF LOAN (NOT EXCEEDING 48 MONTHS)	DURATION OF LOAN MONTHS
I HEREBY APPLY FOR AN AUTOMOBILE POSTING LOAN UNDER THE TERMS OF DIRECTIVE 11 AND AT THE INTEREST RATE SPECIFIED ON THIS FORM. I CERTIFY THAT SUCH LOAN WILL ONLY BE USED TO PURCHASE AN AUTOMOBILE FOR MY PERSONAL USE AT MY POST. I ACKNOWLEDGE THAT I MAY BE REQUIRED TO PRESENT RECEIPTS. I AGREE TO REPAY ANY OUTSTANDING BALANCE WHENEVER I SELL MY AUTOMOBILE OR SHOULD I SEPARATE FROM THE PUBLIC SERVICE.	RATE OF INTEREST
	MONTHLY INSTALMENT
	DATE OF FIRST INSTALMENT
	DATE OF FINAL INSTALMENT
	APPROVAL
SIGNATURE OF APPLICANT _____ DATE _____	FOR THE DEPUTY HEAD _____ DATE _____

### 1.6.2 ACCOUNTABLE ADVANCES

During the course of your relocation and tour of duty, you will inevitably incur expenses which are reimbursable under the Directives. The intent of FSD 4 is that you should not have to go out of pocket. You are, therefore, entitled to receive an accountable advance from your employer for an amount directly related to your anticipated reimbursable expenses.

Accountable advances may not be issued until you have passed your medical requirements or have received a final Posting Confirmation\*. It usually takes three or four working days for a cheque to be issued. Figure 8 illustrates the form which is used to account for advances and submit claims for reimbursement.

For allowable expenses incurred as a result of travel, you are required to submit a full account within fifteen days of completing your trip. Advances for expenses under FSD15.31 should be accounted for within 30 days of occupancy of your accommodation. Other allowable expenses must be accounted for within ten days of their incurrment. Failure to account for advances within these periods could result in eventual recovery against your pay in accordance with the Department's obligations under the Financial Administration Act.

Some employees have run into problems because they have treated an accountable advance in the same way as a loan. When the time for accounting came and a refund was due the employer, no money was available for that purpose. Keep this in mind, especially during the excitement of getting ready to move out of your accommodation and while you are in travel status.

FIGURE 8

ACCOUNTING FOR ADVANCES

Government of Canada / Gouvernement du Canada

TRAVEL EXPENSE CLAIM - DEMANDE D'INDEMNITÉ DE DÉPLACEMENT  
DEPARTMENT OF EXTERNAL AFFAIRS/MINISTÈRE DES AFFAIRES ÉTRANGÈRES

Claimant - Récitant <i>John Smith</i>	Dept. - Division/Ministère - Division EXTERNAL AFFAIRS <i>MX42</i>	Date 6 APRIL 82	Cheque No. - N° du chèque
Residence Address - Adresse du domicile 1234 FIFTH AVE OTTAWA	<input type="checkbox"/> ADVANCE - AVANCE <input type="checkbox"/> Standing Fee <input type="checkbox"/> Trip De voyage		\$
NO's of Claimant - Bureau admt. du réclamation OTTAWA	TOTAL OF CLAIM RÉCLAMATION TOTALE \$ <i>118.90</i>		
Purpose of Travel - Motif du voyage RELOCATION. OTTAWA TO LONDON (PARTIAL CLAIM) Specified Incidental expenses. Temporary Accommodation	<input type="checkbox"/> BALANCE - SOLDE To be refunded by claimant À rembourser par le réclamant <input type="checkbox"/> Payable to claimant Payable au réclamant		\$

Year Année 19 82		DETAILS (including names of places where expenses were incurred) DÉTAIL (y compris le nom des endroits où les dépenses ont été effectuées)	Time of departure and arrival Heure de départ et d'arrivée	Vr. No. / Place No	No. of meals / Nbre de repas	Meals and lodging / Repas et logement	All other expenses / Toutes autres dépenses
Month / Mois	Day / Jour						
April	04	Long distance Call related to sale of house, Ottawa		1			2.65
	04	Arrival of Catharine and will clock at home		2			14.00
	04	Disassembling Utility Shed at home		3			7.50
	04	Gasoline to Mexico (no receipt available)					5.00
	04	Accommodation at Embassy Hotel, Ottawa		4		40.50	41.00
	04	Dinner			1	11.45	
	03	MEXAS			3	22.90	
	03	TAXI to AIRPORT		5			12.50
			Total or sub-total / Total ou total partiel		>	77.75	41.15

**Note:** Many different expenses may be claimed on this form. A few of these are illustrated above.

## 1.7 PERSONAL MAILING PRIVILEGES

The Information Systems and Records Management Division (MGIM) of the Bureau of Communications and General Services is responsible for Mail Management within the Department. It handles a very large volume of personal mail on behalf of employees from External Affairs and other government departments. The extent and variety of services provided are determined by the degree of reliability of postal services and other locally prevailing conditions. The usual means for carrying personal mail include diplomatic airmail and airfreight bag.

### 1.7.1 APPLICABLE TO ALL POSTS

#### Personal Correspondence

All members of the foreign service in Ottawa and Canada-based personnel abroad may use departmental facilities for the exchange of personal mail among themselves. Note the following conditions:

- (a) Only light-weight airmail stationery and standard size envelopes are acceptable,
- (b) since the letter will not enter regular postal channels, it must be addressed according to the following form:

Full Name of Recipient  
Name of Post or Division in Headquarters,

- (c) the sender's name and address must be included in the upper left hand corner of the envelope,
- (d) the notation "Personal" should clearly be marked on the face of the envelope,
- (e) no enclosures are permitted, other than business or legal documents,
- (f) correspondence containing reference to classified subjects should bear the appropriate security marking; however, security classifications must not be used when privacy only is required,
- (g) Mail Management will not open correspondence marked "Personal" but correspondence with obviously improper enclosures will be returned to the sender rather than delivered.

## Specified Health Aids

Prescription drugs, prescription eyeglasses, dentures and other orthopaedic aids not available at the post may be transmitted to employees by departmental facilities. Requirements must be supported by a numbered letter or telex to MGIM signed by the Head of Post.

### P.O. Box 489

Revenue Canada has ruled that interest or dividend payments made to any foreign address, regardless of the recipient's taxation status, are subject to Foreign Resident Withholding Tax. (Since foreign service employees are deemed to be "residents" of Canada, they would eventually receive a refund of any such tax). The Department has rented P.O. Box 489 to handle mail exclusively from financial or similar institutions to help you avoid the delays and complications of claiming refunds or obtaining exemption for tax withheld at source. This procedure is acceptable to Revenue Canada. If you wish to make use of this service, you should instruct your income sources to address their correspondence as follows:

Your Full name,  
C/O Department of External Affairs,  
P.O. Box 489 (Post Code Group\*),  
Ottawa, Ontario,  
K1N 8V5

The use of Box 489 is also acceptable for renewing a Driver's Licence. If you reside in Ontario, submit the change of information stub attached to your licence to the Ministry of Transport in Toronto, together with a brief note explaining that you have been assigned abroad in the "Canadian Foreign Service". If you hold a Québec licence you first have to obtain a special application from the Bureau des véhicules automobiles, 880 Chemin Ste-Foy, Québec, Québec, G1S 4N2.

### 1.7.2 APPLICABLE TO PRIVILEGED POSTS ONLY

An updated list of those posts where employees are entitled to special privileges can be found in the Appendices to Chapter 1 of the PA Manual. Check with APOB or the Post Administrative Officer to determine whether your post is privileged.

### P.O. Box 500

At some posts, local conditions are such that personal correspondence can not or should not be forwarded through regular international postal channels. In these circumstances, you are entitled to receive

correspondence via a special post office box in Ottawa. Correspondence must bear the following form of address:

Your Full Name,  
C/O P.O. Box 500 (Post Code Group),  
Station "A",  
Ottawa, Ontario,  
K1N 8T7.

APOB will give you a sample notification-of-address form which you may complete, reproduce and leave with persons who will correspond with you during the course of your posting.

Whenever you want to send personal mail from a privileged post, simply address your letter in the normal fashion by using P.O. Box 500 as your return address. The person responsible for outgoing mail at your post will forward the letter to MGIM under a special cover. In Ottawa, a Departmental postal clerk will affix appropriate postage to your letter and place it into the regular postal system for onward transmission to the addressee.

#### **Macdonald House, London**

The facilities of our High Commission in the United Kingdom may be used instead of MGIM for personal correspondence where it is more practical. The instructions and procedures for receipt and dispatch are the same as for P.O. Box 500 except that the correct form of address or return address is:

Your Full Name,  
C/O Mail Section (post Code Group),  
Macdonald House,  
1 Grosvenor Square,  
London W1X 0AB,  
England.

#### **Voice Tapes**

Voice tapes, including reels and audiocassettes, may be forwarded to and from any of the privileged posts. Envelopes should be clearly labelled "Voice Tapes" and must not contain any other enclosures.

#### **Film For Processing**

Employees at privileged posts may use departmental facilities to dispatch film for processing and to receive processed slides or prints. Envelopes should be labelled accordingly and the processor should be instructed to use the correct P.O. Box 500 address.

## Greeting Cards

At privileged posts, employees are entitled to exchange Christmas and other greeting cards with correspondents in Canada through departmental facilities.

## Personal Parcels From Canada

Employees at certain posts among those designated as "privileged" have been granted the additional privilege of receipt of parcels from Canada. The rationale for this practise is mainly because essential day-to-day items are non-existent at those posts and local postal service is unreliable. The following conditions apply:

- (a) The names and complete postal addresses of no more than two sources residing in Canada should be submitted to MGIM prior to departure for the post. Form EXT 637 (4/79) is used for this purpose and can be obtained from APOB.
- (b) A maximum of 55 kilograms may be received by an employee in a calendar year.
- (c) The combined dimensions (sum of length, width and height) of any one parcel can not be greater than 140 centimetres and no one dimension greater than 60 centimetres.
- (d) The covers of all parcels must list the contents. The inclusion of liquids, perishables, explosives, matches or other combustible materials such as perfumes and aerosol containers is prohibited.
- (e) Parcels from unauthorized or unidentified sources, or which are suspected for any reason to contain prohibited material, will be examined by Mail Management and may be returned to senders.

### 1.7.3 CAUTION

Your attention is drawn to the following statements concerning the use of departmental facilities for personal mailing privileges:

- Records are not maintained of individual items of personal mail, except for certain basic details of personal parcels
- The Department is unable to assume responsibility for delays in handling, misdirection, loss or damage of personal mail

- It is not possible to send or receive newspapers, periodicals, advertising matter or videocassettes through diplomatic facilities. However, employees entitled to parcel privileges may have their nominees include such material within the annual weight limitation
- Parcels from nominees in Canada may be opened for secure repacking, to be reduced in size to fit within mail bags or because they contain or are suspected to contain prohibited items
- Because of Canadian Customs requirements, personal packages or parcels may not be sent from a post to Canada by departmental facilities. Deviations from this policy should be rare and must be authorized by the Head of Post with immediate notification sent to MGIM
- The improper transmission of personal items via any departmental facility may result in disciplinary action. Incidents of abuse will be drawn to the attention of responsible officials in Ottawa including, if necessary, Customs and the R.C.M.P.

## 1.8 PERSONAL WELFARE COUNSELLING AND ASSISTANCE

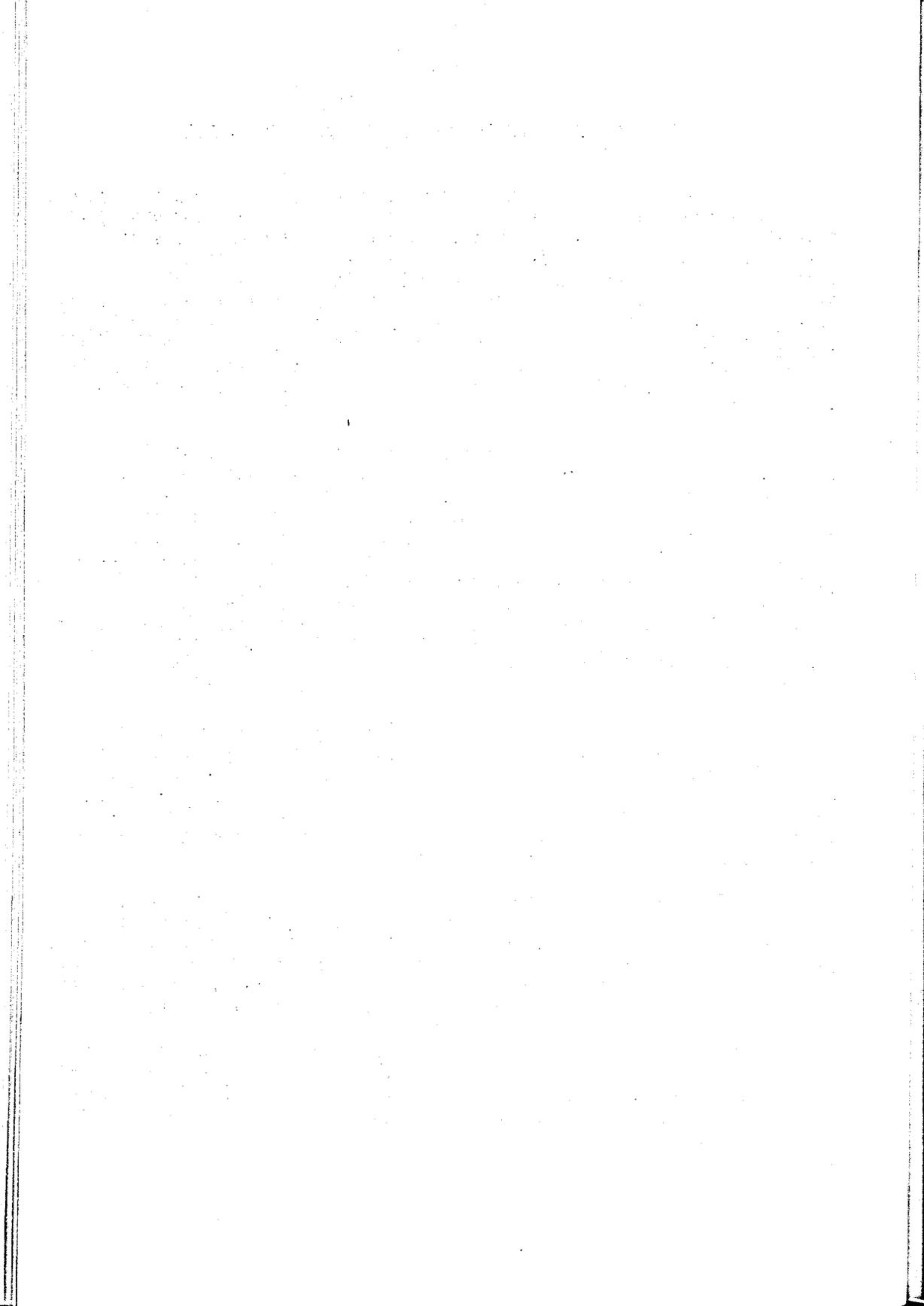
Have you ever felt the need to talk about your personal problems with someone who is not directly involved? It can be very comforting to know that you can count on a sympathetic ear at a time when personal matters are affecting your job. That is why the Department has an Employee Assistance Program and Personnel Welfare Program which are staffed by two professional counsellors. Their personal interactions with foreign service members (employees and dependents alike) are strictly confidential. If you approach them, you can be assured that nothing will be placed on your personal file. To emphasize their detachment from the rest of the Bureau of Personnel, their offices are located two floors above on C-6.

Many employees have a rather narrow impression about what benefits can be derived from seeking advice or assistance from these people. There is an erroneous belief that all they do is try to help employees who have drinking problems. It is true that one of the counsellors, APRN, devotes a significant amount of his time to persons suffering from that illness. To set the record straight, however, he is also responsible for administering the Department's Retirement and Superannuation programs. Employees going out on their last or penultimate posting would particularly be interested in having a short chat to review their entitlements and keep informed of new developments. APRN is also the section to see for employees who are thinking about "buying back" their pension.

The other half of this duo is APRW - the Personnel Welfare Counsellor - available to assist those employees who have personal or work-related problems. She welcomes the opportunity to meet employees or members of their families who are getting ready to leave Ottawa or just passing through en route to the next post. A lot of her work relates to identifying stress factors and, where employees are interested, she can arrange enrollment in a stress workshop.

The services of APRN and APRW are available to you whether you are in Ottawa or overseas. Have you some concerns, for example, about close relatives you are leaving behind? Perhaps it is an elderly widowed parent who has stopped writing to you or a timid child who, for the first time, is living and attending school away from the family. In such cases, APRW can help you keep tabs on someone and attempt to allay your fears.

Since you will not be too far away from C-6 while doing Rounds, why not at least stop into their waiting room and have a look at some of the publications available for you to take home. Keep APRN/APRW in mind and do not hesitate to write, phone or visit if the need arises.



## **Chapter Two**

**Getting Ready**

**for**

**Relocation**

## CHAPTER OUTLINE

	Page
2.1 Starting Off On Rounds	43
2.2 Accommodation And Transportation	44
2.2.1 Shelter Cost (FSD 25.01)	44
2.2.2 Types Of Accommodation (FSD 25.02 - 25.07)	47
2.2.3 Transportation (FSD 15.17; FSD 30)	48
2.3 Relocation Arrangements	51
2.3.1 Travel Entitlements (FSD 15.03 - 15.09)	51
2.3.2 Disposal Of Accommodation (FSD 15.27/15.34; FSD 16.17; FSD 25.09)	54
2.3.3 Removal Companies (FSD 15.13)	56
2.3.4 Shipment And Storage Of Household Effects (FSD 15.14)	58
2.3.5 Preparation Of Inventories (FSD 15.15)	60
2.3.6 Insurance (FSD 15.18 - 15.23)	66
2.3.7 Shipment Of An Automobile (FSD 15.17)	67
2.3.8 Specified Incidental Expenses (FSD 15.31)	69
2.4 Education Of Foreign Service Children	75
2.4.1 Educational Allowances (FSD 34)	75
2.4.2 Other Directives Related To Education (FSDs 35, 37, 51)	79
2.5 Other Appointments	81

## 2.1 STARTING OFF ON ROUNDS

Most of the parameters of your upcoming move have now been defined: Medical examinations have been successfully completed; your Posting Confirmation has finally been issued; many of the essential questions that you were asking yourself only a few weeks ago have now been answered, at least in general terms. Now you are ready to absorb the details needed to make your Pre-Posting Countdown and early days at the new place of assignment proceed smoothly.

As soon as they have a copy of your Posting Confirmation, APOB will invite you and your spouse to attend an interview with their Posting Arrangements Counsellor. Because there are hundreds of other employees all preparing to leave Headquarters within the next two months, this interview is the key event which will coordinate your upcoming visits to various Sections responsible for the administration of the Foreign Service Directives and Personnel Policy. At the time of your interview you will be presented with a Pre-Posting Kit containing a booklet entitled "Posting Arrangement", some of the forms you will shortly have to submit and other important information. The Counsellor will arrange personal appointments for you and your spouse and record the details on a special Schedule in your Posting Arrangement booklet. (As you proceed on your Rounds, have each of the Sections initial the Schedule and return it to APOB when all appointments have been completed). Before concluding the interview, check any points which are not clear with the Counsellor. For example, if you need help in completing a form, the Counsellor will be only too pleased to assist.

The remainder of Chapter Two is devoted to the most important topics which will be discussed during your Rounds. Read it over very carefully making constant reference to the applicable FSDs. Use the "Notes" section in the back of your Posting Arrangement booklet to jot down points you wish to cover in greater detail. Be on time for your appointments and do not feel reluctant to ask a lot of questions. Remember that there have been significant changes in the FSDs and the knowledge you acquire now will make things easier to understand during your posting.

## 2.2 ACCOMMODATION AND TRANSPORTATION

FSDs 25, 26, 28 and 30 deal with accommodation and related topics. The Department's policy on accommodation abroad is based on the principle of "comparability". This simply means that, wherever possible and allowing for local conditions and lifestyles, the Department will try to provide you with accommodation similar to the average, fully serviced rental accommodation normally occupied by someone with a similar income and family configuration in the Ottawa/Hull area. In return, you will pay a monthly Shelter Cost which is similar to the cost of the average, fully serviced, unfurnished rental accommodation normally occupied by someone with a similar income and family configuration in the Ottawa/Hull area.

Because the question of Accommodation is based on "norms" or theoretical averages, there is always the possibility that you will end up with somewhat superior or inferior accommodation on any given posting than you enjoyed in Canada or at a previous Post. Where deficiencies arise you may be eligible for a percentage reduction of your monthly shelter cost.

### 2.2.1 SHELTER COST

The term Shelter Cost (FSD 25.01 (d)) means the amount of money an employee pays to the Department for his or her accommodation, whether it be crown or private, including a share of rent, utilities and various municipal taxes and services. (It does not include telephone and personal services). There are two basic factors used to determine an employee's shelter cost: (a) Household Size and (b) Annual Salary on the date of occupancy.

Household Size means the employee plus dependents who will be residing with him or her on a permanent basis at the post. It does not include unborn but expected children. However, shelter cost adjustments will be made to reflect changes in household size due to arrivals or departures of a dependent. Adjustments come into effect on the first day of the month following the change.

Annual Salary means the salary being received on the date the employee occupies the accommodation. Your shelter cost is not adjusted to reflect any subsequent change in salary after you occupy your permanent accommodation. If your occupational group is in the process of signing a new contract with retroactive pay when accommodation is occupied, the salary used to determine shelter cost depends on the date the new contract is signed. In other words, your old salary is used if you move into the accommodation before the new contract is signed and your new salary is used if you move in afterward. Note that bilingual bonuses and acting pay are not included with your salary when determining shelter cost.

Table V illustrates shelter costs payable as of April 1, 1982. Each year a survey of rental costs in the Ottawa/Hull area is conducted by the Canada Mortgage and Housing Corporation (C.M.H.C.). On the basis of that survey, a new shelter cost table is prepared to reflect the current rental situation.

Example - On the date of occupancy your salary is \$30,000 and your household size is two (self and spouse). According to the table, your shelter cost is therefore \$408 per month. On July 15 a child is born. Effective August 1, your household size has increased to three (3) persons and your adjusted shelter cost would be \$480. On the following April 1, you are still occupying the same accommodation, your household size has not changed but your new salary is \$34,000. In determining your new shelter cost at that time, the annual salary factor stays at \$30,000. In other words, your shelter cost would increase only by the amount of surveyed rental increase in the Ottawa/Hull area during the previous year.

TABLE V  
SHELTER COST

ANNUAL SALARY	NUMBER OF PERSONS IN HOUSEHOLD				
	1	2	3	4	5 or more
Jusqu'à \$13,999	226.00	274.00	274.00	274.00	274.00
14-15,999	235.00	300.00	314.00	314.00	314.00
16-17,999	238.00	304.00	333.00	353.00	373.00
18-19,999	244.00	317.00	352.00	374.00	411.00
20-21,999	250.00	323.00	377.00	398.00	451.00
22-23,999	260.00	336.00	392.00	434.00	474.00
24-25,999	273.00	351.00	411.00	453.00	502.00
26-27,999	289.00	369.00	429.00	475.00	522.00
28-29,999	304.00	389.00	456.00	494.00	544.00
30-31,999	315.00	408.00	480.00	517.00	567.00
32-33,999	332.00	422.00	494.00	539.00	589.00
34-35,999	349.00	446.00	508.00	573.00	623.00
36-37,999	369.00	466.00	528.00	597.00	647.00
38-39,999	384.00	489.00	548.00	625.00	670.00
40-44,999	401.00	513.00	573.00	658.00	708.00
45-49,999	420.00	540.00	598.00	690.00	740.00
\$50,000 et plus	435.00	576.00	625.00	714.00	764.00

## 2.2.2 TYPES OF ACCOMMODATION

There are two basic methods used for securing employee accommodation abroad:

### **Crown Accommodation**

Crown accommodation means accommodation that has been acquired by the Department either by purchase or under a long-term lease. The purpose of this method is to ensure that a succession of occupants will be able to live in suitable accommodation in countries where there is a poor housing market or where other conditions exist making it difficult for employees to find their own. Crown accommodation is usually furnished according to a matériel scheme known as a "MAT". Hard furnishings including drapes, carpets and major appliances are normally provided. Those of you who will be occupying Crown furnished accommodation will need to include in your shipment of personal effects such items as linens, dishes, glassware, cutlery, kitchen utensils, pots and pans, knick-knacks, wall-hangings and special possessions in order to make your house a home.

A considerable amount of time, energy and, of course, money are spent each year in acquiring and outfitting suitable Crown accommodation. The housing situation at a post is carefully surveyed and properties are selected taking into account factors such as location, security, facilities, variable family sizes, representational requirements and overall suitability. You can appreciate that terminating a lease prematurely on Crown accommodation in order to lease an alternative not only defeats the purpose of this method but is also a very expensive undertaking. Therefore, if you are assigned Crown accommodation suitable for your household size, you are expected to occupy it as a condition of your posting.

### **Private Accommodation**

For most employees, private accommodation means a private leasing arrangement with a property owner or landlord. At some posts, mainly in the United States and larger European cities, private rentals are still relatively plentiful. One of the main advantages of this method is that you have the freedom to choose your own home. On the other hand, you will be accepting the entire responsibility to fulfill various tenancy conditions based on local laws and customs which may differ greatly from Ontario or Québec civil law. You will find some useful information and hints about searching for private accommodation in Chapter Four of this Handbook.

When occupying privately leased accommodation, you still have to pay your shelter cost each month. However, you will be reimbursed for your actual rent up to a ceiling amount established for the post. This ceiling is based on annual salary, household size and representational responsibilities. To give you greater flexibility in locating something compatible with your lifestyle, you can elect to have your rent ceiling and shelter cost determined on the basis of a "household size" which is one level higher or lower than your actual household size. A good example of this option is contained in the guideline to FSD 25.02(b)(ii).

Note - If you change privately-leased or Crown accommodation out of personal choice and your annual salary has increased in the meantime, your Shelter Cost may go up. However, your Shelter Cost is not affected if you have to vacate through no fault of your own.

Some employees may conclude that it is to their advantage to purchase rather than rent their own accommodation while outside Canada. The Department has no objection to this practice but cautions that potential legal and disposal problems should be very carefully considered before any irreversible steps are taken. If you buy your own home outside Canada, you will be exempt from paying your Shelter Cost. However, you will not be eligible for any rental assistance or any of the other provisions under FSD 25, including local fuel and utility costs. In other words, you will be on your own. Caveat emptor!

### **Pre-Posting Appointments**

Whenever possible, it is in everyone's best interest that accommodation be arranged prior to arrival at the post. The logical place to start your rounds is in the Staff Accommodation section (MRML) located on the third floor of Tower C. The officer you see will discuss your requirements, communicate with the post if necessary and give you a reasonable idea of what to expect. She may also be able to show you floor plans or photographs of crown accommodation if these have been received from the post. Where no crown accommodation is available, you will find out whether you (and your spouse) are eligible for a househunting trip. (See FSD 15.30). During your visit to MRML, you will also receive important information about other provisions of the Directives which come into play after you occupy accommodation. If you have any questions about shelter cost or furnishing schemes, that is the time to ask.

### **2.2.3 TRANSPORTATION**

Some very significant changes have occurred in FSD 15.17 making it easier than ever before for employees to operate their own automobile at most posts and move it around between assignments. Except as noted in the next sub-section, this Directive provides authority to pay for the shipment on Relocation of one privately owned automobile both to and/or

from the place of duty abroad. This includes the cost of transportation and insurance. Registration of the vehicle may be in your own name or in the name of any one of your accompanying dependents. There is no minimum ownership period required. Cars may be shipped to the post from anywhere in the world but the maximum amount payable can not exceed the cost of shipment between your place of duty in Canada and the post. Note that your vehicle will have to meet the Carrier's shipping specifications and the shipment over a prescribed cubic measurement limitation may entail personal costs.

No doubt you have already made a lot of enquiries about what personal considerations are involved with car shipment, ownership and operation in countries where conditions differ markedly from Canada. Here are some important things to think about:

- How much can I afford to spend?
- Left Hand vs. Right Hand Drive
- Resale value at the end of the posting
- Host country's regulations concerning disposal, registration, environmental control
- Am I eligible for duty-free purchases, sales-tax waivers or any special discounts?
- Will duty be payable at the time of return to Canada?
- Will the vehicle meet Canadian Safety and Emission Control specifications when its time to come home?
- What type of vehicle would best be suited to the state of the roads at the post?
- What about the quality of service and repairs? Are spare parts readily available and reasonably priced?
- Are good used cars available for purchase at the post?

Before you decide on buying a new car or shipping your present one, have another look at the Post Report and discuss the issue during Rounds. You should also read Section 2.3.7 of this Handbook which discusses the Removal Arrangements for automobile shipment and some of the problems that may occur.

### **Crown Held Automobiles**

There are some posts where local restrictions or excessive shipping costs are such that cars will not be shipped at public expense for certain employees. FSD 30 enables Crown-held vehicles to be assigned or alternative transportation arrangements to be made available to employees in that situation.

A list of posts where cars will not be shipped at public expense for certain employees is available from APRK. If you have been assigned a Crown held vehicle before April 1, 1982, you continue to come under the 1979 provisions of FSD 30 for the duration of your current tour of duty. Employees who arrive after that date are assigned a Crown-held vehicle for their own use and will be responsible for taking good daily care of the

vehicle and paying their own fuel costs. They will also pay the post a fixed rental as follows in lieu of all other Vehicle Operating Costs\*:

(a) April 1, 1982

\$1,200 per year, or  
\$ 100 per month, or  
\$ 5 per day

(b) April 1, 1983

\$1,800 per year, or  
\$ 150 per month, or  
\$ 5 per day

(c) April 1, 1984 and subsequent years: The fixed amount will be updated annually based on the methodology agreed to in the National Joint Council.

### Transportation Related Expenses

In addition to provisions for Crown-held vehicles or alternative personal transportation arrangements at some posts, FSD 30 has been revised to consolidate certain entitlements applicable to all posts. These are:

**Commuting Assistance** - is available to compensate you for your actual commuting costs (bus, train, car, etc.) which exceed the cost of an OC Transpo Unipass. The detailed methodology involved in determining commuting assistance is given in the Annex to FSD 30.

**Transportation For School Children** - where it is necessary for children to commute to school due to local circumstances such as distance, availability of public transportation and safety, the necessary expenses are reimbursable. It is the responsibility of the Post Management Committee to determine the most economical and practical method of transportation for this purpose. When the use of your private car is authorized, assistance is based on the "employee-requested" post kilometre rate.

**Post Parking Expenses (Formerly FSD 29)** - designed to approve payment of at-work parking expenses at no cost to yourself. This provision applies only where public transportation is unsatisfactory and you have to commute regularly or use your car to discharge your programme responsibilities.

**Vehicle Registration/Road Tax** - This applies to a privately owned vehicle, including a motorcycle, used as your primary method of transportation. Employees are entitled to reimbursement for annual costs of at least \$20 in excess of the rate payable for their vehicle in Ontario.

## 2.3 RELOCATION ARRANGEMENTS

The Foreign Travel and Removal Service (APRF) is located on the 5th Floor, Tower C. Your first contact will be with APRK, the section responsible for coordinating all of your arrangements. A counsellor will explain the provisions of FSD 15 and other Directives affecting your move, discuss special circumstances and suggest possible solutions to any problems you may encounter. Once you have an idea of your itinerary and have completed the appropriate removal forms, your next step is to visit the Travel Arrangements (APRT) section. Chapter Three of this Handbook goes into greater detail about your involvement with APRF and the personal implications of packing up, disposing your accommodation and preparing to get under way.

Note: APRF publishes and periodically revises a set of Guidelines which are handed out at the time of the Pre-posting Briefing and also sent to posts. Current titles are:

- Accountable Advances And Expense Claims
- Acquisition and Disposal Of A Principal Residence In Canada
- Employees Making Their Own Travel Arrangement
- Expenses Claimable During Relocation Travel
- Expenses Claimable In Temporary Accommodation Prior to Departure From Canada
- Inventories For Household Effects
- Loss and Damage Claims Procedures

### 2.3.1 TRAVEL ENTITLEMENTS (FSD 15.03-15.09)

Planning a trip can be lots of fun and is a good opportunity to let your family share some of the decision making during the pre-posting countdown. On your visit to APRT, a Travel Arrangements clerk will explain claimable "travelling expenses" (FSD 2.01(z)) and calculate your travel entitlement under FSD 15.

APRT is prepared to use its facilities and expertise to help you with your itinerary although you are free to make your own reservations if you so wish. Accountable advances are available to cover the estimated cost of your hotel, meals and other claimable expenses while in temporary accommodation at headquarters and en route. Cheques, airline tickets and/or transportation vouchers will be issued only after your Posting Confirmation has been received.

#### Employer Arranged Travel

Travel to your workplace arranged by APRT is normally undertaken over the most direct route using economy class seating on regularly

scheduled airlines. The use of Canadian carriers when possible is required by Treasury Board Travel Policy. Depending on the length of the journey, overnight stopovers will be allowed in order to reduce the effects of "jet lag". The main exception to travel by air is when you have a car and your new workplace is within two driving days. Unless there is a good reason, you would be expected to drive your car under those circumstances. In all other cases, paid travel leave is granted for the "travelling time" (FSD 2.01(aa)) needed to complete your journey by air, but overtime is not payable for travel on weekends, holidays or outside regular working hours. Where accommodation is required, APRT makes reservations at suitably appointed establishments offering commercial or government rates.

### Employee Arranged Travel

An interesting provision of FSD 15 is that you have the privilege, if you so wish, to make your own travel arrangements. You may travel to your new workplace via any route or mode of transportation you desire and still claim expenses within the entitlement calculated by APRT. If you hire a car, the rental cost plus the actual cost of gas used can be included. When you drive your own vehicle, your expense is calculated by using the "employee request" kilometre rate applicable to your old place of duty. Keep the following points in mind if you decide to make your own travel arrangements:

1. Ordinarily, the transportation portion of your travel entitlement is limited to the amount of a full one-way "economy class air fare between your present and new place of assignment; you are still entitled to the same number of stopovers, travelling expenses and paid travel leave associated with the most direct route by air.
2. Where you choose to drive your own car to your new workplace, your travel entitlement is up to the airfare (as in #1 above) plus the cost of car shipment. (This applies only to situations where the Employer would otherwise have shipped your car at public expense). Within your travel entitlement, you may also claim vehicle operating costs as well as meals, accommodation and related incidental expenses for the number of days required to complete your journey, based on 500 km per day over the most direct route by road. However, you are still entitled only to paid travel leave associated with the most direct route by air.
3. Stopovers can be "pooled"; that is, taken in the same location.
4. You are completely responsible for all costs in excess of the travel entitlement calculated by APRT, including:
  - (a) luxury accommodation; that is, amounts over and above the norm for the post or Canadian location;

- (b) additional costs for hotels, meals and so forth where the Carrier does not accept responsibility for delays.

Note: Excess costs may not be applied to any unexpended balance of your travel entitlement.

5. Any time required in excess of normal travelling time by air will be charged against your vacation leave credits. Note that leave en route must be approved prior to departure by your Assignment Officer.
6. Transportation entitlements must be used during the period approved for Relocation. That is, you will not be reimbursed for any unused portion of tickets.
7. Quotations tend to vary among carriers and travel agents. All fares should be indicated in writing and be obtained from a reputable source. The transportation portion of your travel entitlement is based on the actual fare on the date of travel. Any cash refunds you may subsequently receive must be returned to your employer.

Here are some hypothetical examples associated with making your own travel arrangements. There are obviously many more possibilities for travel between any given points. These examples are designed simply to give you some idea of the considerations involved:

Example 1 - A single employee is posted from Ottawa to Los Angeles and visits his parents who reside in Calgary before reporting to work. Full economy one way airfares are as follows: Ottawa to Los Angeles - \$445; Ottawa to Calgary - \$302; Calgary to Los Angeles - \$250. One day's travel leave but no stopovers are allowed for the most direct route by air. Distance between Ottawa and Los Angeles by the most direct highway route is 4500 km. This would involve a drive of nine days. The cost of shipping the employee's car between Ottawa and Los Angeles is \$705.

If the employee travels by air, his transportation entitlement is \$445 and the employer would pay for the cost of car shipment. The employee could claim admissible meals and related travelling expenses for one day and would be entitled to a day's travel leave. The employee would be responsible for the extra \$107 in airfare and all additional costs.

If the employee travels by his own car, his transportation entitlement is \$1150 (\$445 + \$705). He would be permitted to claim gas, oil, tolls (or use the Ottawa kilometre-rate) plus meals, accommodation and related travelling expenses for nine days and eight nights. However, any excess expenses over \$1150 would be his own responsibility and any working days on which he was absent, beyond the first, would be charged against his leave credits.

Example 2 - An employee is posted from Ottawa to Sydney. Three stopovers and four days travel leave are allowed. Here are some possible itineraries assuming no personal leave is taken en route:

1. Ottawa-Vancouver (stopover)-Honolulu (two night stopover)-Sydney.
2. Ottawa-Winnipeg (stopover)-San Francisco (stopover)-Honolulu (stopover)-Sydney
3. Ottawa-Vancouver (three night stopover)-Sydney.

On each of these itineraries, the employee would be entitled to claim accommodation, meals and related expenses.

### 2.3.2 DISPOSAL OF ACCOMMODATION

Employees should not take any steps to dispose of their accommodation until they have received their posting confirmation and passed their medical examination.

#### Leased Accommodation

If you are renting accommodation in Canada or occupying privately leased accommodation at the post, any penalty charges for cancelling the lease due to your relocation are reimbursable under FSD 15.27(a). You will require a copy of:

1. a letter to your landlord advising him of the date you intend to vacate and requesting that you be informed in writing of any penalty charges you may be obliged to pay to secure release from all financial obligations as they pertain to your lease,
2. the landlord's reply, and
3. your lease.

With the above items, you can obtain an accountable advance from APRK to cover the penalty charges. You should then pay the landlord, obtain a receipt and submit it under an Expense Claim Form to APRK before your departure.

#### Owned Accommodation

If you intend to sell your principal residence (FSD 16.17(b)) in the headquarters area, FSD 16 offers you reimbursement for specified real estate, legal and notary fees and related expenses under certain conditions.

APRK will require an Expense Claim to be submitted together with a copy of the Agreement of Sale and receipted statements of account from your lawyer and realtor.

Employees who have used or are contemplating using their principle residence as an income producing property are advised to consult their district taxation office and read Revenue Canada's information pamphlets and interpretive bulletins.

### General

Whether you rent or own your home, advertising and local telephone charges incurred to dispose of the accommodation may be reimbursed under FSD 15.31 as Specified Incidental Expenses. Please note that agents' fees are not considered to be "advertising" and therefore are not claimable under that section.

### Waiver of Shelter Cost

The situation will sometimes arise where, through no fault of the employee, he or she is faced with maintaining two households or payment of two rents. FSD 25.09 provides relief by granting a waiver of the shelter cost payable at the post. The two situations where this applies are:

(a) At the beginning of a posting where an employee has not had three months posting notice to enable him or her to rent or sell their house. Evidence must be supplied showing what attempts have been made to secure a tenant or buyer, e.g. advertising, listing with an agent.

(b) At the end of a posting where the employer requests and the employee agrees to a short extension of the tour, with the consequence that the employee is not able to rent his or her home in Ottawa/Hull for that period.

Waiver of Shelter Cost is limited to a maximum of three months and can only be extended under exceptional circumstances not attributable to the employee. However, it is not possible to obtain a waiver during a posting under any circumstances.

### Family Separation Expenses

There may be certain circumstances where you are obliged to precede your dependents to your new place of duty. The most common examples are:

- (a) due to operational requirements;
- (b) to enable a dependent to finish a school term,
- (c) illness of a dependent, and
- (d) a dependent remaining to try to sell or rent your principal accommodation.

**FSD 15.34** pays Shelter Cost at the post plus up to \$70 per month to cover unspecified incidental expenses resulting from your separation and need to maintain two households.

**Note** - Remember that your allowances (FSP, PDA) are based on the number of dependents who actually accompany you and will reside with you at the time you arrive at the post. The amounts payable will be adjusted when the separated dependent(s) finally join you.

### 2.3.3 REMOVAL COMPANIES

#### Selecting a Mover

The reality of your upcoming posting will probably not begin to sink into place until you start going through your personal and household effects in preparation for moving day. The first concrete step is choosing a company that will be hired to pack up and store those belongings. Form EXT-225 (See Figure 9) is used for this purpose and will have been handed to you at the time of your pre-posting briefing. You are requested to select one company and bring the form with you to your interview in APRK.

All of the companies listed are located in the Ottawa/Hull area and have been approved by the Department of Supply and Services for packing, crating and storage in Canada. The notation "(B)" following certain names indicates that bonded storage facilities are available at the firm's warehouse. The Department does not favour one company over another. All are required to meet federal and/or provincial standards and make available performance statistics on their estimates, on-time deliveries and settlement of claims. If you are overly concerned about which one to choose, remember that reputable firms will be eager to answer your questions, explain their procedures and packing methods and even let you visit their storage facilities.

#### Household Effects Survey

Following your interview, APRR will arrange for a representative from the company you have chosen to contact you for an appointment to visit your residence. Your cooperation is appreciated. In order to determine the cost of your move and the weight and volume of your possessions, it is necessary that the representative see everything you intend to have shipped or stored. Don't forget to include items in the attic, basement, storage locker, garage as well as any items, including non-perishable foodstuffs, you intend to purchase before packing day.

## FIGURE 9 SELECTING A MOVER



External Affairs  
Canada

Affaires extérieures  
Canada

### FOREIGN TRAVEL & REMOVAL SERVICE SERVICE DES VOYAGES À L'ÉTRANGER ET DES DÉPLACEMENTS

NAME/NOM	POST/MISSION

PLEASE INDICATE TYPE OF SHIPMENTS : AIR  SEA  ROAD  STORAGE   
PRIÈRE INDIQUER GENRE D'EXPÉDITIONS : AVION  MER  ROUTE  ENTREPOSAGE

REMOVAL COMPANIES AUTHORIZED BY C.R.S. - PLEASE INDICATE PREFERENCE  
COMPAGNIES DE DÉMÉNAGEMENTS AUTORISÉES PAR S.C.D. - S.V.P. INDIQUER PRÉFÉRENCE

- |   |   |
|---|---|
| <input type="checkbox"/> A.F. BAILLARGEON LTD. (B)                | <input type="checkbox"/> GUARDIAN VAN LINES (B)                                 |
| <input type="checkbox"/> BARON MOVING AND WAREHOUSING (B)         | <input type="checkbox"/> HILL SECURITY LTD. (B)                                 |
| <input type="checkbox"/> BOYDS MOVING & STORAGE LTD. (B)          | <input type="checkbox"/> IMPERIAL OF OTTAWA<br>VAN & STORAGE LTD.               |
| <input type="checkbox"/> CURRY'S MOVING & WAREHOUSING LTD. (B)    | <input type="checkbox"/> LAKESHORE INTERNATIONAL<br>MOVERS & WAREHOUSE LTD. (B) |
| <input type="checkbox"/> T. D'ARCY LTD.                           | <input type="checkbox"/> LANDRY MOVING & STORAGE                                |
| <input type="checkbox"/> DEVINE'S TRANSFER AND STORAGE LTD.       | <input type="checkbox"/> D.G. MACDONALD<br>MOVING & STORAGE LTD.                |
| <input type="checkbox"/> DIXON VAN LINES LTD. (B)                 | <input type="checkbox"/> MOLOUGHNEY'S VAN & STORAGE LTD. (B)                    |
| <input type="checkbox"/> LES DÉMÉNAGEMENTS DUPRIX MOVING LTD. (B) | <input type="checkbox"/> W. SPARKS & SON LTD.                                   |
| <input type="checkbox"/> FOURNIER VAN & STORAGE LTD.              | <input type="checkbox"/> TIPPET RICHARDSON LTD. (B)                             |
| <input type="checkbox"/> FRED GUY MOVING & STORAGE                | <input type="checkbox"/> ABBOTSFORD MOVING AND STORAGE LTD.                     |
|   | <input type="checkbox"/> DÉMÉNAGEMENT GATINEAU INC.                             |

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

The Mover's representative has nothing to gain or lose by overstating or understating your weight. His company already has the contract for your move and does not have to compete against any others. After your effects have been picked up and brought to the warehouse, those being shipped to the post will be subject to an official "weigh-in" and charges will be assessed on that basis. Remember that you are subject to weight limitations (See 2.3.4 below) and that excess charges are entirely your responsibility.

Hint - Avoid costly outlays for shipping excess kilos you really do not need and will not use. Before the representative comes, go through your house with a fine-tooth comb. Consider having a "garage sale" to dispose of unwanted items or make a charitable donation. Don't be overly influenced by nostalgia. You would be amazed at what tends to accompany you from post to post without ever really getting unpacked!

### **Packing and Moving Dates**

These dates will have been established at the time of your interview with APRK so as to keep time spent in temporary accommodation to a minimum. Reconfirm them with the Mover's representative. Depending on the size of your accommodation and the amount of goods to be uplifted, you are entitled to be absent from your job for a reasonable period of time while the movers are at your home. (These arrangements should be made directly with your supervisor.) Moves are normally planned to occur on consecutive working days with the following day set aside for housecleaning. This means that you will need temporary accommodation for the period that you are unable to occupy your home. (See 3.3)

## **2.3.4 SHIPMENT AND STORAGE OF HOUSEHOLD EFFECTS**

### **Weight Limitations**

As long as it remains to their advantage, employees already at posts as of April 1, 1982 are entitled to continue with their weight limitations under the previous Directives until they return to Canada. If you are posted after that date, your initial and subsequent shipments at public expense will be limited by the weights in the revised FSD 15.14. These weights do not include effects going into storage or the shipment of an automobile. There is no weight limit on your effects that will be stored at public expense with the moving company you have selected.

The Table of Weight Limitations is now structured to reflect the actual number of persons in your household and whether you are required to occupy furnished or unfurnished accommodation at the post. You will always be allowed to ship as much weight on a cross-posting or return to Canada as you shipped out on your initial removal at public expense. However, you will not be entitled to ship more than your present maximum

upon reassignment unless your household size has increased or you will be moving from furnished into unfurnished quarters.

### Methods of Shipment

On postings between Canada and the United States, your household effects will almost always be moved by van. Moves to other countries involve shipment by sea and/or air freight. Usually, your air freight limitation is 700 kilograms with an additional 230 kilograms for each accompanying dependent if you are going to be occupying furnished accommodation. In all other situations, APRR will decide which of your effects may be shipped by air taking into account factors like transit times, port security and information about local conditions provided by the post.

Hint - In addition to seasonal clothing, the "Starter Kit" in Section 3.1 of the Handbook contains suggested items for inclusion in your airfreight shipment. Remember that your Air entitlement is meant to be limited only to those items considered essential for initial occupation of your accommodation in reasonable comfort. Overweight air shipments may be rejected or divided up with one portion going by sea freight. Be conservative since indiscretion at this stage may result in later inconvenience.

### Delivery

Except for air shipments of essential items, you should not expect to receive your household effects for at least a month and very often up to three months later, depending on factors such as distance, the country concerned, sailing frequencies and so forth. Even moves between Canada and the United States are sometimes delayed while the company waits for someone else's effects to fill the van going to a given destination. Here is an idea of what actually happens:

- (a) once your effects are picked up from your home, they are trucked to the mover's warehouse and crated.
- (b) a Freight Forwarder\* is required for all shipments other than those going by van. The Freight Forwarder is obtained on the basis of submitting a successful bid for undertaking to get your shipment from your present location to your destination.
- (c) the Freight Forwarder works out a routing for your shipment that will be approved by APRR. If it is not possible to get your effects to you within three months by surface transportation, the Department will make every effort to ship them by air. However, it must be pointed out that once the shipment leaves Canada much control over its movement is lost, even by the Freight Forwarder. APRR will

always advise the receiving post of the mode(s) of transportation, routing and Bill of Lading\* details. The post administrative officer and APRR are responsible for coordinating their efforts to monitor your move and to follow up with the appropriate authorities if things are not happening according to schedule.

## Storage

At the time of packing, you will be required to sign a warehouse receipt describing the condition of all your furniture and major effects put into storage. Note that before the Mover comes, electrical appliances should be inspected and their good working order attested to by a qualified service person. This expense is claimable under FSD 15.31.

After your arrival at the post, it may become necessary to replace lost or damaged items or to obtain items you did not anticipate being needed at the post. Subsequent shipments at public expense are permitted up to six months later or any time there is an addition to your family. The over-riding concern is that the combined weight of your initial and subsequent shipments does not exceed your maximum allowance.

Hint - Remember that when goods are in storage they may be difficult to locate unless they are labelled distinctively. The Department does not have the staff to rummage around a huge warehouse on your behalf, much as it would like to help.

Note - In cases where you are prohibited from shipping your car to a post (see FSD 30), your employee will pay for the actual and reasonable costs of commercial storage or up to \$20 per month for private storage.

Note - If you inherit additional furniture and/or household effects while on a posting, FSD 15.42 may be used to pay for the cost of their storage (not removal or shipment) until you are reassigned to Canada.

### 2.3.5 PREPARATION OF INVENTORIES

One of the most oft-repeated statements that you will hear during removal is "Make sure you get your inventories in on time". Your inventories should be submitted to APRK no later than two weeks prior to your pack-up date. Even that much lead time may not be enough since very often the inventories have to be translated into a foreign language and/or submitted to the host country's Customs Service in order for import or export clearance to be obtained. That is why the Pre-Posting Checklist in Chapter Three of this Handbook suggests that you start to prepare your inventories at least five weeks in advance of Moving Day.

What are inventories and why are they so important? An inventory is basically a descriptive listing of all your personal and household effects that will be accompanying you to the post or going into storage. The main importance of your inventories is that they constitute a legal record of your possessions and their replacement value which can be used to protect and indemnify you in the event of damage or loss. Despite the precautions taken by Packers and Freight Forwarders, the possibility of damage or loss is a risk in any removal. Consequently, some claims are made every year against the Crown or its underwriters. Getting your inventory completed accurately and on time is the first step towards availing yourself of the loss and damage protection to which you are entitled under FSD 15. (The topics of "Insurance" and "Claims" are dealt with in Sections 2.3.6 and 4.1.3 respectively).

Inventories must be submitted on Form EXT-378/378A or any other form which provides similar information. One original and two copies of each of the following are required:

1. Air Shipment
2. Sea Shipment (or Road Shipment)
3. Accompanying Baggage
4. Storage
5. Private Storage

In addition to the forms required by your employer, make two more for yourself. Take one along in your accompanying baggage and leave the other with a friend or in your safety deposit box.

When completing your inventories, it is for your own good to be as detailed as possible. Make reference to characteristics like Manufacturer's name, make, model, serial number, size and so forth when such details are available. Because insurance is now based on replacement value in Canada without reference to depreciation, it is no longer necessary for you to indicate the original purchase cost of listed items. However, the Year of Purchase and Condition of your effects are essential to determining their fair replacement value.

Hint - With inflation, you might be surprised to find out how much it costs to replace items you purchased years ago. To help you provide accurate figures in the Replacement Value column, check your newspaper advertising supplements or visit local retailers. Employees overseas will often find that Catalogues such as Sears and T. Eaton are received at posts.

To assist with your inventories, you may wish to refer to the following advice and look at the examples of completed forms in Figure 10:

1. Items like kitchenware, books, records, audiotapes and clothing may be entered in groups. If you do so, you should try to state the quantity of each item in the group. The maximum amount payable for any one group may not exceed \$300.

## FIGURE 10 COMPLETION OF INVENTORY FORMS

### INVENTORY OF HOUSEHOLD EFFECTS/INVENTAIRE DES EFFETS MOBILIERS

Employee's name/Nom de l'employé <b>GREEN, JEAN</b>		Class & Grade/Classes et Niv. <b>SCY-3</b>	Page <b>1</b> of <b>5</b> Pages
Posted from/Muté de <b>OTTAWA</b>		Posted to/Muté à <b>MOSCOW</b>	Departure Date/Date du Départ <b>APRIL 17, 1982</b>
Items listed below will be: Les articles énumérés ci-dessous seront:		Accompanying baggage Dans les bagages <input type="checkbox"/>	Shipped air cargo Expédiés par avion <input type="checkbox"/>
		Shipped by surface transport Expédiés par voie de surface <input checked="" type="checkbox"/>	No. of accompanying dependents Nombre de personnes à charge accompagnant l'employé <b>NIL</b>
Placed in long term storage Entreposé à long terme <input type="checkbox"/>		Name of company/Nom de la compagnie	

Item No. Article No.	Qty Qté	Description	Year of purchase or acquisition Année de l'achat ou l'acquisition	At date of inventory Au moment de l'inventaire Replacement cost Valeur de remplacement \$ CDN/CAN	Condition (see below) État (ci-dessous)	Comments Commentaires
1	1	Electric Blender, Waring Nu-Chop serial no. NG42637186	1982	70	A	
2	Good	Kitchenware (Plat, pain, everyday dishes and glasses, assorted serving pieces) 55 pieces	1980-1981	300	A	
3	1	Wine Rack, mahogany and stainless steel	1978	40	B	
4	7	Watercolor washable paintings	1979	24	A	
5	1	Lithograph 3/171 "The Pinks" by Glen Seymour (valuation attached)	1981	625	A	
6	Good	SILVERWARE, Birk's "Prime Member" Pattern Service for 8 (40 pieces)	1978	230	A	
7	1	LADIES' HOME STORE				Covered by Private Insurance
8	3	pr LADIES' Casual Shoes	1982	120	A	
9	3	pr LADIES' Dress Shoes	1982	240	A	
10	1	pr Tackaboard Ice Skates	1980	95	B	
11	1	Cocktail Dress, green with sequins	1982	195	A	
12	1	Evening Gown,	1982	235	A	
13	Good	Assorted Clothing (undergarment, blouse, heavy)	1980-1982	300	A-B	
14	Good	Assorted Clothing (skirts, slacks, jeans) 10 pr.	1980-1982	300	A-B	
15	1	PAINT SUIT	1982	175	A	
				TOTAL	3599	

A Excellent/Excellent  
B Good/Bon  
C Fair/Passeable

Employee's Signature/Signature de l'employé

Date

NOTE: In accordance with Section 3.01 (4) of the Foreign Service Directive 'household effects' means the furniture, household equipment and personal articles of an employee and his dependents but does not include automobiles, livestock or pets.

NOTA: Aux termes de la Section 3.01 (4) des Directives au service extérieur, "effets mobiliers" désigne les meubles, l'équipement ménager et les effets personnels d'un employé et des personnes à sa charge, mais ne comprend pas les voitures, le bétail ni les animaux domestiques.

FIGURE 10 (Continued)

INVENTORY OF HOUSEHOLD EFFECTS/INVENTAIRE DES EFFETS MOBILIERS

Page 2 of 5 Pages

Item No. Article No	Qty Qtd	Description	Year of purchase or acquisition Année de l'achat ou l'acquisition	At date of inventory Au moment de l'inventaire		Comments Commentaires
				Replacement cost Valeur de remplacement \$ CDN/CAN	Condition (see below) État (c-à-d-é-é-é)	
16	Group	Collection of Vasecausettes (15 pc)	1926	225	B	
17	Group	Collection of Pocket Books (100 pc)	1979-1982	250	A-B	
18	Group	Linens (dish towels, hand towels, bath towels, sheets, pillow cases) - 24 items	1975-1978	190	B	
		etc. etc. etc.				
<b>TOTAL</b>						

- A Excellent/Excellent
- B Good/Bon
- C Fair/Possible

Employee's Signature / Signature de l'employé

Date

2. Items of particular value should be stated on their own. There is no rule of thumb as to a minimum value for an item to qualify but many employees separately list any item whose individual replacement cost is \$10 or more.
3. Some items, depending on their value, must be professionally evaluated or appraised in order for their replacement cost to be established. Remember to attach the valuation or appraisal to your inventory. These items include:
  - (a) if valued at more than \$100:  
personally created works such as
    - carvings
    - paintings
    - manuscripts
  - (b) if valued at more than \$500:  
Heirlooms  
Art Objects  
Antiques (Certificate of Antiquity needed)

Note: The personal cost of obtaining appraisals, evaluations and additional insurance is reimbursable under FSD 15.31 (See Section 2.3.8).

4. Expensive crystal, china and silverware should be listed separately from every day servingware. Be sure to indicate the number of pieces.
5. Compensation for broken dishes, glasses and other items in sets is paid only for the number of items actually damaged, not the entire set.
6. Certain items may not be insured at public expense. These include furs, jewellery, coin collections and cash.
7. Items listed on your inventory which are covered by private insurance should be appropriately flagged.
8. If you will be occupying Crown-furnished accommodation, check the furnishing scheme and try to prevent duplication of existing items with your own household effects. Storage costs for unused Crown or personal items at the post are

not allowable expenses. Remember that you will have to assume all responsibility for these items in the event that something goes wrong.

### Prohibited and Restricted Items

The following items may not be shipped or stored at public expense:

1. Items which by shipping tariff restrictions or under international law may not be moved with unaccompanied household effects, including:
  - ammunition and explosives, firearms
  - liquor, wines and other alcoholic beverages
  - cigarettes, cigars, tobacco
  - aerosols, solid or liquid fuel
  - corrosive material
  - livestock, certain species of plants
2. Goods requiring climatically controlled conditions, including many foodstuffs
3. Drugs, narcotic or otherwise
4. Building Materials including patio stones, cement blocks, outdoor barbeques made of these materials
5. Motorized Vehicles including:
  - aircraft and parts
  - trailers
  - boats, except those 5.5 metres in length and under, and parts of boats, except portable pre-services outboard motors, providing pre-acceptance from the Freight Forwarder or Agent is obtained and no extra costs are incurred for packing and crating.
  - farm or construction equipment or machinery
6. Portable buildings except where they are dismantled and accepted by the Mover on a straight weight basis
7. Applicable to long-term storage and moves between or within Canada and the United States: The Crown and its Underwriters will not accept claims for damage to major electrical equipment and appliances, including stereos and televisions, unless the claim is accompanied by a certification from a qualified technician that the items were in good working order before they were placed into storage or shipped.

Note: Some of the above items may be shipped internationally at private expense but special permission is required in virtually all cases. If you contemplate such a private shipment, familiarize yourself with the governing laws, regulations, permit and insurance requirements, consult the Moving Company's representative, the nearest Consular official of the host country and the administrative section of your new post.

Note - Foodstuffs and consumable items not covered by this list may be included in your personal shipment. Check with APRK to avoid difficulties after the fact.

Note - Expenses incurred in obtaining certification of good working order for appliances are reimbursable under FSD 15.31.

The consequences of including prohibited or restricted items in your shipment are broad. At best, you could find that your insurance will not compensate you for any damage to the remainder of your shipment caused by the inclusion of prohibited items. For example, if wine is spilled through breakage and permanently stains linens, the Crown accepts no liability for the loss of the wine or the linens. At worst, you could face disciplinary action or legal action if you contravened Canadian or Foreign law.

### 2.3.6 INSURANCE

Under FSD 15.18-15.20, the employer and/or his underwriters accept all-risk liability for damage and loss to personal and household effects while in transit or in storage. Some employees may remember that coverage used to be based on replacement cost less depreciation to a maximum of \$25,000 per claim. Under the current FSD 15, coverage is based solely on the declared inventory replacement cost in Canada to a maximum of \$50,000 per relocation for items being shipped and \$50,000 for items being stored. As in the past, there are certain items which are excluded from insurance at public expense and documentary requirements to substantiate the replacement value of particularly valuable articles. You are therefore encouraged to obtain professional estimates and purchase private insurance to cover any of your effects not covered by your employer. All or part of these personal expenses may be reimbursable under FSD 15.31.

### 2.3.7 SHIPMENT OF AN AUTOMOBILE

The shipment of privately-owned automobiles at public expense (FSD 15.17) is done by surface means. In practice, transit time for vehicles can take several months and employees should plan accordingly.

If you intend to ship an automobile, this should be one of the first items to look after following receipt of your posting confirmation. If your automobile does not exceed 20.8 cubic metres, APRR will make the necessary arrangements. You will be required to complete Form EXT 650 (See Figure 11) and bring it to APRK together with six copies of the vehicle registration.

You may also be considering the possibility of purchasing a car outside Canada and having it shipped to the post. This is permissible so long as you have obtained prior authority from APRR. However, you are responsible for making all of the necessary arrangements as well as for payment of costs in excess of those associated with shipment to the post from your old place of duty in Canada. An accountable advance may be obtained for this purpose but remember to keep all your receipts and submit a claim as soon as you take delivery of your vehicle.

When you are making your own arrangements, remember to take out personal and all risks marine transit insurance which should cover the replacement and shipping cost of the vehicle. It is essential that an accurately completed Condition Report is made before shipment. Bear in mind that the term "all risks" often does not apply to mechanical and electrical malfunctioning unless it can be proved that such damage was caused by damage or imprudent handling in transit. You may encounter difficulty in proving liability, especially if you are shipping a used car. Read the fine print in your policy very carefully and get a satisfactory explanation from your insurance agent.

Hint - If you have not done so already, speak to colleagues who have gone through the experience of shipping their automobiles. Contact dealers, manufacturers and/or freight forwarders and try to get an estimate of current transit time. Before you make up your mind, remember there is a high risk of damage and theft associated with shipment of motor vehicles. Also, serviceability, parts availability and cost, customs and resale restrictions as well as the general state of the roads and security at the post may make operating your own vehicle a nightmare. Remember that all of these costs are entirely your responsibility.

Hint - Consider including accessories such as cassette decks, hub caps and windshield wipers with your shipment of household effects.

Note - Ensure that no gap occurs between the time your marine transit insurance expires and your personal automobile insurance coverage begins at the post.

FIGURE 11

SHIPMENT OF AUTOMOBILES

NAME (in block letters)/NOM (en majuscules)	Post/Mission
---	--------------

DESCRIPTION OF PERSONALLY-OWNED VEHICLE SHIPPED FROM OTTAWA  
DESCRIPTION DU VÉHICULE PARTICULIER EXPÉDIÉ D'OTTAWA

Year/Année	Make of vehicle/Marque	Style/Modèle	
Motor number/ Numéro du moteur	Chassis number/Numéro du châssis	Licence number/Numéro de la plaque d'immatriculation	
Length (in cm)/Longueur (en cm)	Width (in cm)/Largeur (en cm)	Height (in cm)/Hauteur (en cm)	Weight (in Kg)/Poids (en Kg)
Date vehicle can be released/ Date à laquelle vous pouvez libérer la voiture	Date of owner's departure/ Date du départ du propriétaire	Value in dollars/ Valeur en dollars	

P.S. Enclose six copies of vehicle registration  
Joindre six copies du certificat d'immatriculation

Signature	Date
-----------	------

EXT 650

### 2.3.8 SPECIFIED INCIDENTAL EXPENSES

The 1979 Directives made a distinction between "specified" and "unspecified" incidental expenses. Under the former FSD 15.31, an employee was entitled to reimbursement for a rather limited number of specific items. In addition, he or she was entitled to claim up to \$200 for unspecified expenses not covered under any other Directive.

FSD 15.31 has been amended under the new Directives to give you much more flexibility in planning your move. Providing you obtain proper receipts, you may now claim up to \$1,800 per Relocation for legitimate expenses associated with foreign service removal. Every April 1, the ceiling will be updated based on average salary increases negotiated throughout the public service in the previous calendar year. Although you can no longer automatically claim \$200 for unspecified expenses, you may claim up to that amount, within the overall ceiling, for any specified expenses or losses where receipts are unobtainable.

Here are some of the items for which specified incidental expenses may be claimed. This is a representative, not an exhaustive list. Other items, e.g. real estate fees, school application fees, and so on may be reimbursable under some other directive. If you are uncertain whether or not you may be entitled to claim for a certain expenditure, you should check with APRK or the post administrative officer:

#### 1. Administrative Costs

Administrative costs resulting from cancellation of insurance policies.

#### 2. Advertising

Advertising required to:

- dispose of accommodation at the old place of duty in Canada
- acquire and dispose of accommodation at a post
- acquire and dispose of essential household equipment and appliances at a post
- dispose of personal automobiles

#### 3. Alterations

(a) Alterations to such items as:

- draperies

- curtains
- blinds

(b) Cost of altering locks on new residence (Labour only)

#### 4. Appraisals

(a) Professional appraisals of items on employees' inventories such as:

- personally created items such as carvings, paintings, manuscripts, etc. valued at more than \$100.
- valuable items such as heirlooms, art objects, antiques and stamp collections valued at more than \$500.

(b) Professional appraisal in connection with the sale of a principal residence when real estate fees are not incurred

#### 5. Assembling/Disassembling

Assembling and disassembling such items as:

- garden and patio furniture
- above-ground swimming pools
- utility sheds

#### 6. Certificates

Costs of inspections to obtain "Certificates of Good Working Condition" (required by the Crown's Underwriters), for electrical equipment and appliances placed in storage or shipped within North America.

#### 7. Cleaning

- (a) Cleaning of permanent accommodation after removal of furniture
- (b) Cleaning carpets and draperies prior to long term storage

#### 8. Connecting/Disconnecting

Connecting and/or disconnecting in employee's permanent accommodation, but excluding alteration or renovation to structure:

- one telephone
- cablevision
- electrical supply

- natural gas supply
- essential household equipment listed on employee's inventory
- essential household equipment unique to a post

#### 9. Conversion

Conversion of electrical appliances to make them compatible with electrical service at new place of duty.

#### 10. Estimates

Estimates of repair costs for articles damaged in transit which are covered against all risks by the Crown.

#### 11. Fees/Licences

- (a) Legal fees in relation to the form/legality of a lease for permanent accommodation in Canada
- (b) Payment of duplicated local licences (such as driver's licence) necessitated by relocation
- (c) Rental Agency fees to locate permanent accommodation at the new place of duty in Canada

#### 12. Gratuities

Gratuities paid to packers and movers

#### 13. Installation/Removal

(a) Installation or removal of such items as:

- television antennas
- valance boxes
- curtain rods
- wall hooks
- clocks

(b) Taking up or relaying of items such as:

- carpeting
- hall runners

#### 14. Insurance

Cost of insurance for items in storage or in transit which are not covered against loss or damage by the Crown.

## 15. Loss of Fees, Premiums

Loss of fees and premiums which are not cancellable such as:

- club membership fees unless covered by official hospitality or other employer provided funds
- insurance premiums

## 16. Miscellaneous

- (a) Loss of food stuffs and other items in closing household at old place of duty
- (b) Photocopy and transmittal costs for transcripts of academic records for the employee and/or dependents
- (c) Purchase of school books at new location if such books are required for the normal course of study and are not claimable under FSD 34 provided relocation has taken place during the school year
- (d) Post Office change of address
- (e) Tuning of pianos and other musical instruments

## 17. Repair/Replacement

- (a) Repair or replacement of electrical equipment and appliances certified as in good working condition when placed in storage, due to deterioration while in storage
- (b) Replacement of fixtures which by terms of lease agreement may not be removed on termination of occupancy, e.g. curtain rails

## 18. Shipment of Pets

Shipment of domestic pets except for the purchase of a flight kennel and demurrage charges related to intransit quarantine but including other quarantine expenses including those incurred during an authorized stopover

## 19. Storage

Prepayment of commercial storage expenses for articles not accepted for storage as part of household effects such as:

- recreational vehicles
- trailers
- boats

## 20. Telephone Calls/Telegrams

- (a) Long distance telephone calls related to
  - purchase of a principal residence at the new place of duty in Canada
  - sale of a principal residence at the old place of duty
- (b) Local telephone charges to dispose of or acquire accommodation at the employee's old or new place of duty
- (c) Telegraphic charges to expedite the shipment of household effects to the employee's new place of duty

## 21. Transportation

- (a) Local transportation expenses incurred as a direct result of employee's relocation including:
  - locating accommodation at new place of duty
  - supervising pack-up and removal or delivery of household effects while in temporary accommodation
  - arranging customs clearance of household effects or PMV
- (b) Car rental costs may be considered as an admissible expense where this is cost effective in relation to other forms of local transportation or where there is no viable alternative; car rental costs may also be considered as an admissible expense for interim transportation following shipment or disposal of the employee's PMV at the old place of duty or where the employee is awaiting the arrival of his PMV which is being shipped to his or her new place of duty.

## 22. Vehicle Modifications/Inspections

- (a) Mechanical inspection of a PMV where required by local law when employee takes delivery at new place of duty
- (b) Modifications to a PMV authorized for removal, to meet anti-pollution or other safety standards (this could include removal of equipment such as a catalytic converter prior to shipment from Canada when this equipment is not required at post and PMV will be returning to Canada)

**The following are examples of inadmissible expenses;**

1. Purchase of new goods, i.e., furnishings, rugs, drapes and household equipment or improvements and repairs to effects which are already owned;
2. Alterations or repairs to residence;
3. Expenditures for which specific provisions (including any limitations) are made elsewhere;
4. Expenses related to financial arrangements resulting from the acquisition or disposal of permanent accommodation (e.g. mortgage finder's fees, surveyor's fees on the sale of a principal residence, adjustments on closing, such as municipal taxes, etc.).

## 2.4 EDUCATION OF FOREIGN SERVICE CHILDREN

The Department has long recognized that the rotationality of many of its employees depends to a great extent on the opportunities available for their children to continue in school without serious disruption. Part V of the Foreign Service Directives deals with this and related subjects. It is divided into three Directives: Educational Allowances (FSD 34), Education Travel (FSD 35) and School Holiday Maintenance (FSD 37). These Directives are administered in Headquarters by APRO, located on the 4th Floor of Tower "C". The Educational Allowances Counsellor there would like to see both you and your spouse during Rounds because the non-employee parent is often the partner most concerned on a day-to-day basis with your child's education. A visit to APRO can ease a lot of worries and will pay dividends at a later date. This is the time to bring up any concerns you might have about the comparative merits of education in Canada versus the Post and the financial and personal costs involved. If your child has any type of a learning problem or needs extra tutoring, the Counsellor will communicate with the Post on your behalf and find out if special arrangements can be made. A good way to prepare for your appointment is to re-read the Post Educational Facilities Report and discuss possible scenarios with your child's current teacher and guidance counsellor.

### 2.4.1 EDUCATIONAL ALLOWANCES

By providing you with financial assistance, the object of FSD 34 is to ensure that your child obtains an education approximating as much as possible Canadian standards and costs. A comprehensive list of admissible educational expenses is set out under Paragraphs 34.01(b) and (c) of this Directive. (See Appendix A for a summary of the main changes under the 1982 FSDs.) Three main factors are involved in determining the extent of assistance made available. These are:

1. **Compatibility of educational facilities** at the Post with our own institutions (See 34.01(a) for the factors which define compatibility);
2. **Place where education is taken;** that is, at the Post, in Canada, or away from the Post but not in Canada;
3. **Level of education:** Primary or Secondary.

Of these factors, compatibility is the most important. The vast majority of our Posts have primary schools which will generally meet your child's educational needs. However, there is a greater probability that secondary-level schooling systems may be considered incompatible. This is especially true in the senior grades of high school where preparations are being made to meet university entrance requirements.

Note - "Primary" education includes kindergarten and Grades 1 to 8 in Ontario or their equivalent in other provinces. "Secondary" education includes level I and II C.E.G.E.P. in Québec and Grade 13 in Ontario or their equivalent in other provinces. Except for Shelter Assistance (See FSD 34.06 and below), Educational Allowances are not paid for post-secondary studies.

Employees and their spouses at posts are invited to evaluate schools so that post management can draw up a roster of compatible facilities. Based on the cost of attending a "typical" school on the roster, an educational allowance ceiling is established for the post and amended annually. Back in Canada, ceilings for domestic education are established following an annual review of tuition fees and related costs for representative private schools.

Educational allowances are normally payable in one or two lump sums, the first coming at the beginning of the "School Year". To avoid confusion, note that all references to "year" under the Directives covering Education mean the year beginning September 1 and ending August 31.

To help you with your planning, refer to the summary of educational allowances and related provisions found in Appendix D. Note that board, lodging and certain other expenses are not always covered and that your choice of arrangements may negate certain travel benefits under FSD 51. When you visit APRO, you will receive an Education Allowance Proposal Form F.S. 34.1 (See Figure 12) and, based on the ceilings in effect at that time, you can work out the option you consider best meets your and your child's interests.

There is no need to go out of pocket for admissible expenses within the established ceilings. When schooling is taken at the post, an accountable advance may be obtained from the post financial officer. In all other circumstances, an Education Allowance Proposal must be submitted to APRO and approved before an advance can be issued. Your expense claim, together with detailed and properly receipted school billing, should be settled within thirty days.

Hint - APRO is particularly busy in the months preceding the beginning of the school year. Don't make things more difficult for yourself and them by waiting until the last minute to get your proposals or claims submitted.

Note - Many schools have limited enrollment. It is essential for you to start making inquiries as soon as you have been notified of your assignment.

### **Compatible Facilities At The Post**

Where facilities are compatible, you may already have selected the "right" school on the basis of the Post Educational Facilities



Report. APRO can telex the post to get things underway if an advance application is required. If you have a choice of schools, it is sometimes advisable to wait until you arrive and then have a closer look. The post administrative officer will arrange appointments and, if necessary, even write you a letter of introduction.

Despite the fact that education facilities at your post are compatible, you still may wish to send your child to primary school in Canada or in a third country. In this situation, your educational allowance is limited to the total admissible educational expenses at the least costly school on your post's roster. This amount may be somewhat less than the post ceiling and may be NIL at some posts. It is payable in lieu of all other expenses to which you might have otherwise been entitled, including those under the Education Travel and School Holiday Maintenance Directives and under FSD 51 - Family Reunion Travel. This situation could wind up being very expensive so it is recommended you examine the pros and cons very carefully before committing yourself.

### **Incompatible Facilities At The Post**

Your decision as to where your child will be schooled is more difficult when temporary separation will ensue. Where facilities at the Post are not compatible, the Department favours your child's attendance at a school while living with relatives or going to a boarding school situated as close as possible to family or good friends. For most employees this means Canada, but arrangements in other locations may be more desirable. In either case, your education allowance will cover the admissible educational expenses up to the Canadian ceiling plus limited board, lodging and costs of personal laundry and mending services.

Note - APRO maintains a list of acceptable boarding schools in Canada but does not keep lists of those in other countries. Employees should note that FSD 34 does not cover strictly personal expenses such as clothing and pocket money.

### **Shelter Assistance**

Employees whose children are Canadian secondary school graduates and are continuing with full time studies in Canada are eligible to receive shelter assistance for their children of up to \$4.00/day during the academic year (FSD 34.06; 34.07).

### **Relocations**

If you are relocated from a post during the school year, FSD 34.10 ensures that you will continue to receive an educational allowance and related entitlements for that child and makes special provisions to keep you from having to go out of pocket for increased educational expenses resulting from your departure.

## **Note Concerning Separated Spouses**

Where an employee's child resides with a spouse who has chosen not to accompany the employee to the post, educational allowances or related expenses may not be paid under FSD 34 without special authorization from the Treasury Board. Employees in this situation are cautioned to approach APRO as soon as possible.

## **2.4.2 OTHER DIRECTIVES RELATED TO EDUCATION**

### **Education Travel**

FSD 35 is intended to pay the actual and reasonable costs of getting your child to and from his or her place of schooling when the normal Relocation Directive, FSD 15, does not apply. It is fairly straightforward and covers basically the same Travel expenses as does FSD 15. Under the 1982 revision to this Directive, your child's unaccompanied baggage allowance has been increased to 100 kilograms. Remember that a claim must be filed within fifteen days of completing the journey.

One problem that does arise is the authorization for an escort to accompany the child at public expense. This is permissible in unusual circumstances such as situations where educational facilities at the post are incompatible, prior registration at the child's educational institution is not accepted and alternative arrangements cannot be made. Mitigating circumstances should be brought to the attention of APRO whose prior approval is required in all cases.

### **Family Reunion Travel**

FSD 51 is intended to bring your dependents home to you at the Post at least once and sometimes up to three times a year. This Directive can be used in rare post-related circumstances for you and/or your spouse to travel to your child's location but special approval is required. The operation of this Directive is explained more fully in Chapter Four.

### **School Holiday Maintenance**

FSD 37 is intended to cover the cost of a student's living expenses during school holiday recesses where these are not part of the paid-up boarding arrangements that were covered under your FSD 34 education allowance. It does not apply to the long school holiday recess ("summer break", for most students) unless there are extenuating circumstances. This Directive pays for the actual and reasonable costs of meals, lodging and necessary transportation, including travel to stay with a nearby relative or friend.

Note - FSD 37 operates on an "either/or" basis. If it is less expensive for your child to stay at or near school, his or her maintenance costs are reimbursable. If it is less expensive for your child to proceed to your post, his or her travel expenses are payable.

**Summary**

The provisions of FSDs 34, 35, 37 and 51 do not apply in all cases. This is particularly true where educational facilities at the post are compatible but your child is in primary school in Canada or either primary or secondary school at a third location. Appendix D in this Handbook is a consolidation of the charts following FSDs 34 and 51. Check out your entitlements carefully!

## 2.5 OTHER APPOINTMENTS

Refer to the Schedule of Appointments you obtained from the Posting Arrangements Counsellor in APOB. The amount of time you spend in each of these Sections may be less than in the ones described above but your visit is just as important. Here are some notes to help prepare you for your remaining Rounds. Remember to have the responsible employee initial your Schedule before you leave.

### Passports and Visas

The Passport Division (MPO) is located on the ground floor of Tower D, just off the main lobby. When calling for your appointment, please be sure to bring any valid Canadian passports currently in your possession. Any of your dependents who are not Canadian citizens should ensure that their national passport will remain valid beyond the anticipated duration of your posting.

Staff in MPO will assist you with the completion of your application form, advise you on the documents needed for proof of identity and citizenship and the specifications for acceptable photographs. In the event you do not have an eligible Guarantor, the Declaration may be completed by an Officer of the Department.

The country to which you are being posted, as well as those you may be accredited to or visiting en route may require that you obtain an entry visa prior to arrival. Check your itinerary with MPO and be sure to allow several weeks for the necessary visas to be placed in your travel documents.

### Official Languages (APL)

Your language-usage responsibilities and level of proficiency will be discussed. Employees who are receiving Bilingual Bonuses will be advised of the need and procedures for re-certification. This is a good time to discuss arrangements that can be made at the post for you and your dependents to receive instruction in your second official language.

### Security (ZSSG)

With growing incidences of international terrorism, it is unwise to be blasé about the basic steps you can take to reduce the possibility of personal involvement. At the required security briefing, you will be reminded of your responsibilities with respect to the security of documents, locks, dealings with nationals of the host country and related subjects.

## **Geographical Division**

A chance to review the basic involvement that Canada has in that part of the World covered by your post.

## **Medical Coverage and Benefits (APRO)**

In addition to Education Allowances, APRO is the section at Headquarters that administers your health plans and the FSDs concerned with medical and related expenses. One important purpose of your visit will be to arrange for O.H.I.P. or Québec Health Insurance coverage to be terminated and replaced by the Outside Canada Hospital Plan and G.S.M.I.P. (comprehensive) insurance. This is a good time for you to review the other medical and hospital plans which some of you are paying for privately or through monthly deductions from your salary, e.g. Disability and Death Benefits. The Health Benefits Counsellor will also explain the following Directives:

**FSD 38 - Preventive Medical Services Expenses**

**FSD 39 - Special Health Care Expenses**

**FSD 40 - Normal Health Care Expenses**

**FSD 41 - Health Care Travel**

**FSD 42 - Medical Expense Advance**

Because these Directives will not affect you until you actually get to the post, an explanation of their provisions has been reserved for Chapter Four.

## **Official Hospitality (APRH)**

Employees who will be required to extend or accept hospitality in support of post programmes will be given a briefing on the Department's Policy and an explanation as to the various expenses that may be incurred under different circumstances.

## **Chapter Three**

### **The Pre-Posting Countdown**

## CHAPTER OUTLINE

	Page
<b>3.1 The Pre-Posting Checklist</b>	85
<b>3.2 Personal Responsibilities</b>	99
<b>3.3 Temporary Accomodation and Relocation Travel</b>	105

### 3.1 THE PRE-POSTING CHECKLIST

Early preparations for your new assignment should now be over and you may already have begun your pre-posting rounds. Hopefully, your medical results have been determined and, if you plan to sell, your house has been listed on the market.

Arranged in the form of a checklist, here is a logical sequence of items to look after as you count down to departure day. Many of the items relate to sections of the Foreign Service Directives and are considered in some detail in this Handbook. You may find it helpful to use this Checklist as a means of charting your progress and keeping to a reasonable timetable for getting things done systematically.

#### AT LEAST FIVE TO SIX WEEKS BEFORE MOVING DAY

**Call the family together.** Explain to the younger children what will happen over the next few weeks; review your overall strategy and give everyone a chance to get involved with details and to feel they are making an important contribution.

**Review the moving expenses** covered under the FSDs; get a copy of the pamphlet "Moving Expenses" and Bulletin I.T. 178R2 from Revenue Canada. Set up a means of collecting your receipts and keeping track of your expenditures, whether they are reimbursable or your personal responsibility.

**Select a moving company and reconfirm** the exact date of your move in consultation with APRK; set up an appointment for a company representative to visit your home for a Household Effects Survey.

Before the Mover's representative arrives, do your own survey of your belongings and decide what to keep and what to discard.

Make sure the Mover's representative sees everything that will accompany you to your post or go into storage; advise any imminent purchases; keep in mind your overall weight limitations.

Carefully prepare a detailed inventory of all your possessions and divide it into sections for Storage, Air, Sea and/or Road Shipment and Accompanying Baggage; note items of particular value, those covered by private insurance, and those which will not be shipped at your employer's expense.

Make sure you are aware of the Mover's and/or the Crown's maximum liability in the event you have to make a loss or damage claim. Arrange to get qualified estimates for items of particular value. Purchase the necessary additional "all-risks" coverage based on the replacement cost of your effects.

Communicate with your landlord to arrange termination of your lease. If you are an owner and plan to rent, start advertising or retain the services of an agent.

If you are eligible, proceed to the Post on a househunting trip; in any event, tap the expertise at the post for specific information relating to the availability of private accommodation and, if you have school age children, educational facilities.

Make transportation arrangements for any pets who will accompany you to the post; have your pet examined by the veterinarian and given any necessary inoculations; obtain certificates.

**FOUR TO FIVE WEEKS BEFORE DEPARTURE**

Prepare a list of people and organizations who should be notified of your move, for example:

**Relatives**

**Friends**

**Business Associates**

**Professional Services**

Doctor

Pediatrician

Dentist

Orthodontist

Lawyer

Accountant

Broker

**Insurance Services**

Life

Homeowners' or Tenants'

Automobiles

- Banking Services**
- Credit Cards**
- Accounts Payable**
  - Department Stores
  - Car Loan
  - Mortgage
  - Finance Companies
  - Ontario Hydro/Hydro Québec
  - Bell Canada
  - Heating Fuel
- Government Agencies**
  - Driver's Licence/Registration/Inspection
  - Municipal Taxes
  - Health Insurance
  - Post Office
- Subscription/Memberships**
  - Newspaper
  - Magazines
  - Record/Tape/Book clubs
  - Social Organizations
  - Recreational/Athletic/Sports
- Other**
  - Schools

Clergyman; place of worship

Alumni Organizations

Review the section on "Personal Mailing Privileges" and advise the above as soon as you know what your new address will be.

If you are not shipping your car, arrange for its sale or storage; safety inspection is required in Ontario prior to transfer of ownership; contact your insurance agent.

Consider the desirability of making a Will, if you (and your spouse) do not already have one.

Do you have or need a safety deposit box? Do you require someone to have Power of Attorney on your behalf including access to your property and financial affairs?

Phase out your grocery purchases; begin to use up canned goods, frozen foods and cleaning supplies.

**THREE TO FOUR WEEKS BEFORE DEPARTURE**

Start to collect your important personal papers and documents together; make necessary duplicates and retain them in safe place:

- Children's school records and reports
- Family medical and dental records, immunization data, prescriptions for drugs and corrective lenses
- Letters of introduction from your club, lodge, clergyman or business associates
- Employment references for Spouse
- Letters of Credit from your Bank
- Letter of "No Claims" from your automobile insurance agent

**Resign memberships in clubs or other organizations.**

**Contact the provincial Department of Motor Vehicles to advise change of address and continuation of your Driver's Permit**

**Review your insurance requirements**

**Advise Bell Canada of date telephone service is to be disconnected**

**TWO TO THREE WEEKS BEFORE DEPARTURE**

**Have your Garage Sale or dispose of unwanted items.**

**Inventory of Personal Effects must be completed and submitted to APRK.**

**Review FSD 15.31 for admissible Incidental Expenses.**

**Pick-up Accountable Advances.**

**Finalize your travel itinerary and reconfirm transportation and accommodation arrangements.**

**Prepare your automobile for shipment or for the drive to your new post. Have it gone over carefully and serviced by a competent mechanic.**

**Convert any electrical appliances which will accompany you abroad; obtain certificates of good working order for those remaining in storage or being shipped between Canada and/or the U.S.A.**

**Have your rugs and drapes cleaned and pre-wrapped.**

**Make or take delivery of your final major purchases; retrieve any items being repaired or loaned to friends; return anything you may have borrowed from others.**

**Start your farewell visits to family and friends; make the rounds of your "special places"; unwind a little - have an open house or informal party. Don't forget the children - make a party or have a special outing for them and their friends.**

#### **A WEEK BEFORE THE MOVERS ARRIVE**

**Start to assemble all of the items that you will take with you on your trip. These should include:**

**Suitcases, valises, totebags with their keys and identification tags**

**Passport Wallet, Identification**

**Important Papers, Records**

**Baby's Needs; Travel Toys**

- Eyeglasses, sunglasses
- Pocket Sewing Kit
- Valuables
  - collections
  - jewellery
  - furs
  - irreplaceable personal items
- Camera, accessories and film
- Small Personal Hygiene kit
  - dental supplies
  - washing needs
  - grooming needs
  - scissors,
- Notebook, ballpoint pen
  
- Pick up your passports, tickets and other travel documents.
  
- Obtain sufficient supplies of travellers cheques and foreign currency.
  
- Make your "last-minute" purchases

**TWO DAYS BEFORE PACK-UP**

**Finish all laundry and dry cleaning**

**Empty and defrost your refrigerator.**

**Start separating your personal effects into "Storage", "Air Shipment", "Sea Shipment", "Van" and keep one room or area aside for your suitcases and the items that you will carry on your own**

**Put together a "Starter Kit" containing items that may be required immediately you occupy your new accommodation. These items should be packed in a specially labelled box and included in your air shipment:**

**Kitchen Supplies**

paper or plastic plates, cups and cutlery

napkins

one or two plastic or tupperware jugs (1 Litre)

small saucepan and serving spoon

bottle/can opener

**Foods (non-perishable)**

instant soup mix or cubes

tinned pudding

- crackers
- dry cereal
- instant coffee, tea bags, creamer
- sugar, salt
- chewing gum, hard candy

**Bath Supplies**

- towels and face cloths
- kleenex, toilet paper
- soap, deodorant, toothpaste

**Cleaning Supplies (non-corrosive, non-aerosol)**

- paper towels
- sponge
- dish towels
- scouring pads
- soap powder
- kitchen/bathroom cleaner

**For the Children**

- a few favourite toys
- puzzles
- colouring books/reading material

**Miscellaneous Items**

- flashlight
- screwdriver, hammer, pliers

- aluminum foil
- garbage bags
- elastic bands
- transistor radio
- candles

- First Aid Kit (See Appendix E)**

**PACK-UP: DAY**

- Check the contents of your drawers; remove anything that will spill, break or otherwise damage your belongings if improperly packed.**

- Pack your suitcases and totebags for transfer into temporary accommodation.**

- Wash and dry your dishes, glassware and return them to their shelves; collect and group any items you particularly want the movers to pack in the same carton; remove linens from beds.**

- Pets to be taken to the Carrier's kennel prior to onward transportation.**

- Disconnect and unplug all appliances.**

Be on hand before the packers arrive; make sure the packers know what is and what isn't to be loaded.

Keep an eye on things; watch how the packers tag each item and record its condition on their inventory; speak up if something is not being done to your satisfaction or appears irregular; contact APRK if necessary.

Do not leave your premises unattended while the packers are at work; make a tour of your residence to insure that no items have been overlooked.

Check and sign the packer's inventory and keep one copy.

Confirm when the van will be arriving to load your effects and then lock up the premises.

#### MOVING DAY

Be on hand before the van arrives; remain until everything has been loaded and then make a final inspection of the premises.

Check that the correct destination address appears on the Bill of Lading, sign and retain one copy.

Clean up any mess and make sure that:

furnace is turned down

all lights turned off

windows and doors closed and locked

Return all of your keys to the landlord or to the person who will be responsible in your absence.

### 3.2 PERSONAL RESPONSIBILITIES

There are many arrangements you must make for yourself before you go abroad. Some are very personal but most are common to all. You will already have seen some of the following topics in the master Pre-Posting Checklist and in other parts of the Handbook. For the sake of additional convenience, the major areas of personal concern have been abstracted for you in the Checklist below. The remainder of this section goes into greater detail about certain aspects of those topics which seem to crop up or cause concern more frequently than others.

Figure 13

#### Major Areas Of Personal Concern

- Code of Conduct/Conflict of Interest
- Change of Address
- Taxation
- Banking Arrangements
- Investments
- Power of Attorney; Wills
- Custody, Maintenance and Guardianship
- Looking After Financial Obligations
- Disposal Of Unwanted Items
- Insurance
- Collection Of Needed Documents
- Special Purchases
- Community Responsibilities
- Saying Farewell

#### Code of Conduct/Conflict of Interest

Employees are reminded to read the Departmental publication entitled "Code of Conduct and Conflict of Interest Guidelines" prior to departure. Any questions pertaining to this area should be addressed to the Coordinator, International Appointments and Access to Information and Privacy Legislation (ACO), who is located in B4-232 of the Lester B. Pearson Building.

Employees appointed by Order-in-Council who are required to establish or who may already have established a "Blind Trust" should acquaint themselves with the instructions contained in Circ. Doc. Admin. No. 13/82 (ACO). Similarly, any employee who considers that he or she may be in a conflict of interest situation due to his or her investment portfolio should carefully read the circular document. The costs incurred in respect of establishing, maintaining, administering and discharging such trusts are reimbursable subject to certain limitations. All inquiries should be directed to the Office of the Assistant Deputy Registrar General, 4th Floor, 207 Queen Street, Ottawa, Ontario, K1A 0C9.

### **Change Of Address**

One of the most fundamental responsibilities you have is keeping people informed of your whereabouts. Therefore, one of the first items of personal business should be to put together or update your household address book making sure to include all business, professional and commercial correspondents in addition to your family and friends. When your list is complete, you can obtain Change of Address cards from any Post Office and start mailing them out. Get a receipt for the stamps that you purchase and, if you wish, claim the amount under FSD 15.31. Be sure that each correspondent gets the right address since in some situations you will have more than one, i.e. Address of Post, Special P.O. Box Numbers.

Hint - P.O. Box 489 and/or 500 should be used for all financial matters as well as for other correspondents who require you to have an "address of convenience".

Hint - Time-payments or annual interest yields on Canada Savings Bonds can be arranged through one of these special Box numbers. Contact the Department of Supply and Services, Canada Savings Bonds Section, 45 Sacré Coeur, Hull, Québec,

### **Taxation**

For taxation purposes, you are deemed to be a resident of Canada. In lieu of provincial income tax, there is a surtax of 46% of the basic federal tax payable. T4 Slips are issued in late February or early March and mailed to posts. Your post will already have received a supply of appropriate T1 Income Tax forms and Guides which you may tap in the event your personalized form has not caught up to you. Take note that your spouse or dependents physically residing in Canada would be subject to different provisions if they were receiving income. Employees who sell their houses may be liable to Capital Gains Tax while those deriving Rental Income are entitled to deduct certain expenses from their revenue. Copies of Circular Documents regarding these matters are available from APOB. It is a good idea to visit your local Revenue Canada office and pick up whatever Interpretative Pamphlets and Bulletins apply to your circumstances.

## Banking Arrangements

Don't forget to notify APRE of your banking particulars for deposit of pay and allowances. Leave clear instructions at your bank concerning the deposit of cheques regularly received such as Family Allowances, pensions, dividends. Depending on what the Post Report says about local facilities and foreign exchange restrictions, you may wish to discuss special arrangements with your Bank Manager. Some of the services offered are letters of introduction, letters of credit, overdraft privileges, automatic transfers between accounts, automatic credit card payments and issuance of monthly statements.

Hint - There may be a slight advantage to deal with foreign subsidiaries of Canadian banks. Find out from your manager what courtesies are available at branches or correspondent banks overseas. At the same time, determine what service charges, if any, are incurred when you transfer funds. Make sure you have an adequate supply of cheques.

Hint - Safety Deposit Boxes represent one of the most economical and secure means of storing valuables and originals of important documents. There are sizes available to fit most requirements. Two keys are provided with each box. You can appoint someone in Canada as your agent by having that person sign the bank's access record in your presence. He or she can then be left a key and instructed to enter your box if and when certain items are needed.

## Investments

Review your portfolio taking into account any changes occasioned by Government Budgets or amendments to tax laws. Are your investments in a form which enables easy liquidation in the event cash is urgently needed? Be sure to leave written instructions with your agent in Canada regarding the disposition of assets or the reinvestment of their proceeds as well as any accrued interest.

## Power Of Attorney; Wills

As you can see from some of the topics already discussed, it may be desirable to rely on someone you can trust to look after your interests (including your property) while you are abroad. That person does not have to be a lawyer. You can legally appoint any competent individual including your relatives or friends. You can also be as limiting or broad as is necessary in setting out the areas where your agent will be authorized to act on your behalf. It is advisable to execute a written Declaration for this purpose witnessed by someone who is empowered to administer Oaths.

No one likes to think about the prospect of Death. As uncomfortable as that might appear, imagine the difficulties your dependents might encounter if uncertainty existed about your bequests and the nature of your assets. No matter what your material or financial situation, a will provides you with some promise that your wishes will be observed after your death and gives your beneficiaries a degree of security that may hitherto have come from your employment income. Wills are not expensive documents to draw up and may be prepared by a Notary or Lawyer. The Department does not keep wills on file but they do require that APOB be informed where a copy of your will is located. Keeping a copy of your will at the post can also alleviate difficulties since it may be necessary for certain actions to be taken before family or friends in Canada can be reached.

### **Custody, Maintenance and Guardianship**

Employees proceeding abroad leaving children and/or spouses who are subject to Separation Agreements or court-ordered stipulations should not risk embarrassment and unneeded legal difficulties through failure to live up to their financial obligations. Yet another consideration is the problem of access to your children. Frankly, it will never be the same as it was before you left Canada. In the past, some employees in this position have experienced guilt, despair and incurred onerous expenses trying to prove otherwise. The unhappiness their youngsters have faced shuttling between the strange and the familiar - to pick up the threads of a broken relationship for three or four weeks at a time under artificial and potentially threatening situations - can be heartbreaking. This is definitely a time for the employee and those he considers important to be realistic and seek advice from sympathetic people who are not emotionally involved. Although it might appear rather late to be making that sort of a decision, a cancelled posting may be preferable to aborting an assignment in mid-stream.

Dependents who are not residing with their parents by reason of attendance in school or infirmity should have designated Guardians. The party or parties to whom children are entrusted should be provided with written authorization for them to act in loco parentis.

### **Looking After Financial Obligations**

Go to your new post with a clean slate. Pay all of your bills before you leave and make proper arrangements to ensure that continuing obligations will be covered by standing order, series of post-dated checks or some other mechanism. Unpaid debts tend to follow you wherever you go and can give other people the wrong impression about your integrity.

### **Insurance**

This would be an appropriate time for you to review the extent of your life insurance coverage. Check with your agent and remember that

you may be entitled to participate in Group Plans through your collective bargaining unit or employer.

Certain of your other types of policies will shortly have to be cancelled. Arrange for your Homeowners or Tenants coverage to cease once your household effects have been uplifted. Make provisions for extra insurance to cover any valuables in transit which will not be covered at Crown expense under FSD 15. Remember to include any jewellery, collections, furs and other items which will be part of your accompanying baggage. Arrange to have your automobile insurance cancelled effective the date of its disposition. If you are storing your car for a long period, you may need to modify your existing policy. If you are making your own arrangements for shipping a car to your new place of duty, check the extent of coverage provided at Crown expense and purchase any extra all-risks coverage you may feel is necessary.

FSD 15.31 covers the cost of additional privately purchased insurance for excluded items. It also allows you to claim for policy administration costs and loss of insurance premiums on your car or residence, on a pro-rated basis, when such premiums are non-refundable on cancellation.

### Collection Of Needed Documents

Set aside a special drawer for all of the documents that should be accompanying you to the Post. Obtain certified photocopies and leave one set with someone you can trust or use a safety deposit box. Depending on volume, some of these items can be forwarded ahead by Departmental Mail. Remember to include school records for the children and letters of reference, curricula vitae, diplomas, qualifications for dependents who may be able to seek employment.

### Special Purchases

Have you given any thought about some of the things you're going to do in your spare time? Do you have any hobbies? What is the state of recreational opportunities at the Post? Any supplies that are not readily available overseas should be purchased at this time and included in your shipment. In some countries, English or French reading material is scarce or very expensive. Spend a half hour at the bookstore with your family and choose a selection of paperbacks to keep you going for a while. If you are attracted by certain sports, the basic equipment plus spare parts could be shipped. Videocassettes are becoming an increasingly popular means of entertainment. All Hardship Posts will be supplied with at least one videocassette recorder and a colour receiver by the Fall of 1982. Feature films from a library of over 350 titles are already being sent to those Posts originally equipped. The Department uses equipment which is NTSC Standard and takes one-half inch VHS format cassettes. Tri-Standard videocassette recorders and television receivers are available but much more costly. This is a rapidly changing technology. If you are thinking about purchasing video hardware, shop around and discuss the state of the art with a reputable dealer.

There are some posts where local purchase of more necessary items is impossible and importation from abroad is unreliable. Based on the information you have obtained about your post, start to acquire the necessary items for inclusion in your shipment.

Hint - It is permissible to include foodstuffs providing they are not perishable, require special handling or are specifically prohibited for some other reason. To avoid the possibility of items opening and spoiling another portion of your shipment, (this situation may not be covered under insurance), concentrate on dehydrated foods. Avoid bottles, tins that have been on the shelf for a long time. Take special care with pre-packing.

No matter what your responsibilities may be at the post, you are a Canadian and will be identified as such by the local populace. Before you go, think about purchasing a selection of small gifts that are uniquely Canadian. They don't have to be large or expensive. Even post cards or commemorative postage stamps are very welcome to a lot of people who have never been to Canada.

### Community Responsibilities

Don't forget to tender your resignation or cancel your membership in organizations and clubs you will no longer patronize. This is particularly important if you are serving on committees or holding office. Very often these organizations are part of an international brotherhood or sisterhood and may be represented in the country to which you will be posted. A letter of introduction might be worthwhile.

All foreign service members are, in a sense, part of the same "community". In case you were not aware, there is a voluntary interest group called the Foreign Service Community Association which has an office on the first floor of the Pearson Building adjacent to the auditorium. This is a group of your colleagues and, particularly, their spouses who try to make foreign service easier for all by sharing their experience in some of the more practical aspects of life abroad. Their members have written papers on selected topics which will enhance your understanding in many ways. Feel free to contact them and ask their advice. At one time or another most of them have gone through the same routine you are now facing.

### Saying Farewell

Leave ample time to say your good-byes. Don't forget about the children and their peers. A special party or outing, (perhaps a costume or theme party based on the country in which you will be living), can be loads of fun and help your child adjust to the upcoming move. Try to space out your visits over the last two to three weeks but leave the three days before departure free for more intimate and quiet gatherings with your most important relatives and friends.

Remember to leave specific instructions about how to contact you in the event of an emergency.

### 3.3 TEMPORARY ACCOMMODATION AND RELOCATION TRAVEL

Under FSD 15.33, upon transfer to a post, all employees may claim, if necessary, up to 21 days living expenses. (Defined in FSD 2.01(s)). On return to Canada, accompanied employees may claim, if necessary, up to 21 days while single employees are limited to 14 days. This includes an entitlement of two days at headquarters or the previous post prior to departure and another two days taken at the new place of assignment. It also includes time taken during an approved househunting trip. Specific packing or housecleaning requirements may necessitate a stay in temporary accommodation beyond two days before departure. This should be arranged in consultation with APRK.

Sometimes, it simply is not possible to occupy accommodation within the time limits for environmental reasons e.g. lack of suitable facilities, repairs to be completed, or due to exceptional operational requirements like departures on very short notice or delays in agrément for Heads of Post. In such cases, the employer may authorize an extension of full living expenses less the applicable Shelter Cost. When the time limit is exceeded in Canada, the employee is subject to the applicable Shelter Cost on the day of arrival at the Post.

Advances for living expenses can be obtained from APRT or the post financial officer about a week before moving day. Travel claims must be submitted within 15 days of arrival at the new place of duty.

#### Claimable Expenses

The rates stated hereunder are all in Canadian dollars and were in effect during the Spring of 1982. Rates for gratuities may be higher or lower in some countries due to local custom. Amendments to some of these rates occur from time to time. Check with APRT or APRK before leaving headquarters. While you are abroad, consult the "Schedules To Foreign Service Directives And Meal Rates" which is revised monthly and sent to all Posts.

Daily Meal Rates - In Canada, rates are set by the Treasury Board under its Travel Policy. These rates are reviewed twice a year and published in the Schedules to Foreign Service Directives and Meal Rates. Different rates, stated in local currency, are established for meals taken at each of the Posts.

#### Gratuities To Chambermaid

\$0.50/day or \$3.00/week for single occupancy  
\$0.65/day or \$4.00/week for double occupancy  
\$0.80/day or \$5.00/week for up to three dependents  
\$1.00/day or \$6.00/week for more than three dependents

### Gratuities For Baggage Handling

\$0.35 per bag (number of pieces of luggage must be stated on claim form)

Taxi Fare - Claimable between residence and hotel (as a temporary accommodation expense) and between hotel and airport as part of your Travel entitlement. Receipt required for fares over \$5.00 (in Canada) or \$10.00 (outside Canada).

Laundry and Dry Cleaning - Actual and reasonable expenses accompanied by receipts. Coin operated facilities should be used whenever available in which case receipts are not required for small amounts.

Accommodation - Most arrangements will have been made by APRT or by your Post. When you are making your own arrangements, remember that any costs over an above your advised travel entitlement are your own responsibility.

(i) Hotel or Motel: actual cost of room at preferential rate quoted for government personnel. Total allowable cost includes parking one vehicle, local taxes and compulsory service charges;

(ii) Self-Contained Commercial Accommodation: as for hotel but note that only 80% of the applicable meal rate can be claimed.

(iii) Non-Commercial Sleeping Accommodation: When you are staying with relatives or friends, the following amounts may be claimed:

\$11.00/day for employee and one dependent

\$1.00/day for each additional dependent to a maximum of \$15.00

Currency Conversion - The cost of purchasing or exchanging traveller's cheques or foreign currency from accountable advances may be claimed when supported by receipts.

### Getting Ready For Departure

As you are already aware, this portion of your living expenses should be limited to the time it actually takes you to move out of your old accommodation and into the hotel or other quarters prior to travel. This period will normally be one to three days depending on the quantity of household effects involved. Sometimes, a slightly longer period may be required because of weekends, legal holidays or the inability of the movers to pack on a requested date. Extensions beyond three nights under these circumstances require the approval of APRF.

Note - Extensions of the period for which you are entitled to living expenses will not be granted for personal reasons such as your decision to sell or rent your property more than three days before departure or where you have vacated your residence early to enable redecoration or repairs to be made.

It is a good idea to start getting ready for your move into temporary accommodation before pack-up day. This will enable you to separate those items which will accompany you in your baggage from those being shipped or going into storage. You will also be able to devote your time to watching the packers and cleaning out your old accommodation without having to worry about doing an extra load of laundry or getting involved with unnecessary repacking. As most of you will have a tiring voyage ahead, try to minimize the tendency to overindulge as is often associated with farewell festivities. Keep your contacts down to the level of your closest friends and immediate family. Make sure that all your important documents, tickets, money are in order. Go over the instructions you will be leaving with others and say your good-byes. Try to get to bed earlier than usual on the night before your departure.

### En Route

You are about to enter a transition state during which time you will feel "neither here nor there". Most of you will be travelling to your new places of assignment by air and the reality of your situation begins to take hold when you check in at the ticket counter. You may recall that APRT advised you about accompanying baggage weight allowances applicable to your routing. Although some Carriers\* now permit more generous weight allowances subject to compliance with luggage dimensions, many still limit you to 20 kilograms per full-fare paying passenger in addition to imposing limits on the number and dimensions of bags you may bring along. When flights are especially full, ticket agents will even weigh your hand luggage if it appears to exceed permissible limits. Make sure you know your weight limitations before you set out for the airport. You are reminded to carry enough local currency to pay for whatever excess baggage charges may be imposed. This may be considered an allowable expense covered up to a maximum ceiling under FSD 15.31. You should also be prepared to pay a departure tax if such was not applied to the cost of your ticket. Save your receipt and claim for this expense after you arrive. Departure taxes are considered to be part of the transportation cost and will be reimbursed without affecting your specified incidental expenses entitlement. Where foreign exchange regulations permit, purchase a small amount of currency that you will need for porters, attendants, drivers and those you will encounter between the time that you arrive at your destination and are dropped off at your hotel. Pick up a few magazines, pocket books and children's diversions and confections so that everyone will have something to keep busy during the flight.

In addition to getting you from Point A to Point B, the airline(s) used en route have certain responsibilities governing international carriage. In the event that you are subject to unduly long delays or miss a connection that has previously been confirmed, the carrier will normally provide you with vouchers for food and accommodation and try to make an alternative booking for the remainder of your journey. Unfortunately, there are serious inconsistencies in the attitudes of the staff of some airlines and very often one must be firm in order to get some action. Be prepared to do a combination of persuasion, cajoling and demand to see the airline station manager if you are not getting anywhere with the ground staff. In some countries, a suggestion that you might call the airport or tourist police works wonders but remember to back up your words with actions. If you are passing through countries where Canadian missions are located, report your problems to a Consular Officer. Be guided by common sense. Take note of all relevant particulars including the names of persons you spoke to, times of day, treatment accorded and so forth. If you have to go out of pocket, pay the bill but retain your receipts. After you arrive at your new workplace, you will be in a position to document a claim for expenses which would not ordinarily have occurred. Please note that such claims will be entertained only when travel arrangements were made by APRT.

More immigration, customs and check-out formalities await you at the end of the journey. You are apt to be fairly tuckered out so it is best to proceed directly to your hotel (or to your SQ if it can be occupied with a "pack-up" kit). Most posts will have made special arrangements for your reception. Remember that you are entitled to a suitable rest period and that your effectiveness will improve more quickly if you don't rush into things the minute you land.

## **Chapter Four**

### **Life at the Post**

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## CHAPTER OUTLINE

	Page
<b>4.1 Arrival At The Post</b>	<b>111</b>
4.1.1 Arrival Check-List	111
4.1.2 Occupancy of Accommodation (FSD 25)	116
4.1.3 Loss And Damage Claims (FSD 15.14-15.26)	122
<b>4.2 Post Management And Administration</b>	<b>126</b>
4.2.1 Organization Of The Post	126
4.2.2 Administrative Problems	126
<b>4.3 Personal Adjustments</b>	<b>128</b>
4.3.1 Attitude	128
4.3.2 Culture Shock	129
4.3.3 Children	130
4.3.4 Servants	130
4.3.5 Money Problems	131
4.3.6 Alcohol	131
<b>4.4 Preventive Health Care</b>	<b>133</b>
4.4.1 Medical And Related Expenses (FSDs 38 - 42)	133
4.4.2 Health Risks	135
<b>4.5 Leave And Travel Assistance</b>	<b>138</b>
4.5.1 Foreign Service Leave and Travel Assistance (FSDs 45, 50)	138
4.5.2 Family Reunion Travel (FSD 51)	141
4.5.3 Emergencies (FSDs 54, 64, 66)	142
<b>4.6 Preparing For Final Departure</b>	<b>145</b>

#### 4.1 ARRIVAL AT THE POST

Getting yourself re-established in a new environment is in many respects the reverse of the Relocation procedure that has just been completed. Unless a Staff Quarter has already been assigned, much of the early days will be spent hunting for suitable accommodation. Later, it is the movers once again; the unpacking and putting-away begins with the aim of making your residence a place where you can feel comfortable. Throughout the initial month, you should be exploring your new surroundings and testing the reality against what you learned prior to arrival. Before you know it, you will be meeting new people, making new friends and learning how to operate successfully in a foreign society.

The uncertainties associated with accommodation and receipt of personal effects shipments make it more difficult to adhere to a rigid timetable for getting settled. However, there are some basic things that must be done and you may find that the Checklist which follows is a helpful reminder.

##### 4.1.1 ARRIVAL CHECKLIST

###### FIRST STEPS

Check into your temporary accommodation (or SQ) and get some rest.

Go easy on the eating and drinking until you have gotten over jet lag and your body has begun to adjust to the changes in climate, diet, altitude, sanitary conditions, etc.

If you are in the Tropics, give your body a chance to adapt; you cannot expect to initially maintain the same pace as you did in Ottawa.

Introduce yourself and your family to the Head of Post, your Program Manager and the Post Administrative Officer; get a briefing on some of the things you need to know about settling in comfortably (N.B. Leave the program briefing until later; the Post Administrative Officer will, in most respects, be prepared to help you during your "settling-in" period.

If you are occupying Crown-held accommodation, go out to the SQ with the Post Administrative Officer, inspect the premises and its inventory of furnishings. If the post has a "pack-up kit" of essential items, you may be able to occupy the SQ almost immediately.

If you have to find accommodation, get some initial suggestions as to where you should start looking and what sort of facilities you can expect to find.

Obtain a good map of the city and surrounding area. Start to explore using various means of transportation. Make notes about the availability of schools, commercial, professional and social services.

Establish banking facilities

File Expense Claims

Pick up mail that has been forwarded to you.

For employees with school-age children, check out the suitability of institutions (where required); complete applications or registration procedures; file Education Allowance Proposal if required.

Confirm the expected arrival and delivery dates of your Air, Sea (or Road) Shipments.

Get acquainted with other Canadian families at the post. They have been through this already and can offer valuable time-saving advice.

When you have located accommodation, arrange for your services, e.g. telephone, electricity, water to be connected.

Arrange insurance for your possessions.

#### WHEN YOUR BELONGINGS ARRIVE

Where language or local customs may cause difficulty, try to arrange for someone knowledgeable from the post to be on hand.

Be available to accept delivery. Your Air Shipment may already have arrived. Find your "Starter Kit" and start putting these items to use. Give the movers plenty of room to operate and specific instructions about where to put things.

Supervise the unloading and unpacking very carefully; check that the number and description of boxes corresponds with the information on the copy of the packing inventory you obtained at your previous residence; note any changes in condition or items missing on the local movers and your own record. Have the movers take away any unwanted cartons and packing material.

As you put things away, check them off against your own Inventory of Personal Effects. Note any damages or losses for preparation of a claim. Allow everyone to help but do not try to get everything done at once.

File your Notice of Intent to Claim properly and in accordance with the prescribed procedures and specified time limits.

#### SETTLING IN

Locate a safe place for your documents.

Arrange for the connection of major appliances; transformers, if required, are supplied by the post. Most posts have appliances which can be supplied on a loan-to-staff basis.

Arrange for medical and dental services.

Check local car licencing and registration requirements.

Follow up on any Loss or Damage Claims.

Get acquainted with the local people; ask questions; meet your neighbours; explore your neighbourhood; get in touch with local organizations who make special arrangements for newcomers or those whose activities are the same as your own.

#### 4.1.2 OCCUPANCY OF ACCOMMODATION

Hopefully you will have had a pleasant journey to the post and are now relaxing in your hotel. If you will be occupying Crown accommodation or have already secured a private lease during a househunting trip, you will likely be moving in a day or two. Where the post provides a "pack-up" kit, you may prefer to move into your SQ immediately. If you need to locate private accommodation, you have up to twenty-one days with paid living expenses in which to find something suitable. Remember that days spent in temporary accommodation at headquarters or your last post as well as time taken on an approved househunting trip are included in this entitlement.

Be prepared to use your remaining time wisely. Purchase a detailed map of the post city and its environs. Take the time to do some exploration and familiarize yourself with the transportation network and various neighbourhoods. Rely on the experience of your colleagues and check out some of the suggestions made by knowledgeable locally-engaged employees at the mission. You are entitled to be away from the office for reasonable periods while looking for accommodation and most of the essential expenses you may incur are reimbursable under FSD 15.31.

Note - Some posts keep temporary staff quarters equipped with adequate furniture, furnishings and appliances. If you are assigned to this temporary SQ, you may not claim living expenses other than for your first two days at the post. A Shelter Cost is payable after 21 days.

#### Private Accommodation

Various questions should be running through your mind as you (and your family) become familiar with the Post. You will soon have to decide which considerations are the most important and best meet your lifestyle and mobility needs. Here are some examples:

- How much time do I want to spend getting to and from work each day?
- Will I need two cars? If my spouse doesn't drive, will he or she be able to get around, shop, etc?
- How far is it to my child's school?
- Where do we go for recreation?
- Are public services such as garbage removal and Police dependable?
- Is the neighbourhood safe?

- Is there any overt or subtle discrimination against foreign nationals.

Once you have isolated several possibilities, analyze each location or community against your personal notion of acceptability. You might find it useful to draw up a rough rating scale on which each important consideration can be visually compared. An example of such a rating scale is given in Figure 14.

When you have found something that meets your needs, let the post administrative officer and/or your manager take a look at the accommodation. While this may be required only in cases where your accommodation will be used to extend hospitality in support of mission programmes, the opportunity for someone else to offer their advice can often bring something to your attention that you may have overlooked. These people are concerned about your welfare at the post and may be called upon to act on your behalf if, for example, you experience any serious problems with the landlord.

If you have to give an advance deposit in order to rent private accommodation or furniture or to obtain public utility service, you can request an accountable advance under FSD 25.20 and 25.22 from the post financial officer. Because advance rent is applied to your tenancy once you occupy your accommodation, post administration will recover the amount loaned from your actual rent in the appropriate number of monthly instalments.

Sometimes it is necessary to give a security deposit to your landlord or an agent in order to rent accommodation and/or furniture. Security deposits are not refundable until the termination of your lease. FSD 26 provides for an advance of up to six months rent in order for you to make a security deposit. This advance will not be recovered until your lease is terminated and you have been reimbursed by the landlord or agent. FSD 26 also provides you with protection from unreasonable withholding of the security deposit when it has been determined that you are not responsible for any alleged damages.

Note - Sometimes, it is simply not possible to occupy accommodation after 21 days for environmental reasons such as lack of suitable facilities or repairs to be completed. (Remember that the 21 days includes occupancy of temporary accommodation at your old place of duty and time spent on approved househunting trips.) You may be authorized an extension but will be required to pay your Shelter Cost starting on the 22nd day.

**FIGURE 14**  
**COMMUNITY PROFILE**

Rate each possible location for your private accommodation against the following scale:

	1	2	3	4	5										
	Does not exist	Poor	Fair	Good	Excellent										
	Address		Address		Address										
	First Choice		Second Choice		Third Choice										
Central Location	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Public Transit	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Road Conditions	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Gasoline/Auto Services	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Schools	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Doctors/Dentists	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Hospitals	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Shopping	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Churches	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Recreation	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Public Utilities	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Maintenance/Repair Services	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
_____	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
_____	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

This figure continues on the next page

FIGURE 14 (Continued)

	1	2	3	4	5
	Very Serious Problem	Major Problems	Minor Problems	Potential Problems	No Problems
	Address		Address		Address
	First Choice		Second Choice		Third Choice
Pollution	1	2	3	4	5
Sanitary Conditions	1	2	3	4	5
Population Density	1	2	3	4	5
Local Attitude to Foreigners	1	2	3	4	5
Police/Fire Services	1	2	3	4	5
Security of Accommodation	1	2	3	4	5
Personal Safety	1	2	3	4	5
Seasonal Hazards	1	2	3	4	5
_____	1	2	3	4	5
_____	1	2	3	4	5

## **Crown Accommodation**

The post administration officer will normally accompany you to your new Staff Quarter (SQ) and will give you (and your spouse) a "guided tour". Make a visual inspection of the state of affairs and identify any obvious problems which presently or will very shortly require maintenance. If your SQ is furnished, you will be given a copy of its Contents Inventory. The presence and condition of each item should be verified as you go from room to room. You should also check the contents against the Crown furnishing scheme ("MAT"), taking note of any discrepancies. When this has been done, you will be asked to sign an Occupancy Agreement. This is essentially a lease between you and your employer which sets out your joint responsibilities with respect to the care, maintenance and rental of the SQ.

## **Payment Of Shelter Cost**

You will be required to complete some special Housing forms to provide post administration with the details needed to calculate your actual shelter cost. You are required to pay Shelter Cost from the day you take occupancy of your permanent accommodation. Subsequent payments are due on the first working day of the month. You are also responsible for paying your shelter cost during periods of absence from the post on leave, including Foreign Service Leave, and while on temporary duty.

Note - As Shelter Cost includes the cost of utilities, make sure that arrangements exist for bills to be sent directly to the Post for payment.

## **Insurance**

Be sure to arrange for adequate protection of your personal and household effects and your automobile with coverage commencing on the date you receive these items. Talking to your colleagues will generally put you in touch with one or two reliable Agents. It is suggested that you insure your items on the basis of full replacement cost. Remember that local prices and the need to pay shipping and importation costs means that some items may have a higher replacement cost than the one indicated on your personal inventories.

Warning - Personal insurance is not the sort of thing to treat lightly. It is strongly recommended that you deal directly with the Insurer and not assume that a third party, however helpful, will be dependable and cognizant enough of your needs to purchase insurance on your behalf. You may encounter situations where, out of necessity, your understanding of the local language or regulations requires that an interpreter be used. When this happens, you should ensure that all documents are translated into the official language of your choice by a Translator who is recognized by the mission. Don't assume that you are insured to the same extent as in Canada merely because you have been handed or signed

some official looking document. It is your responsibility to read your Policy very carefully and to ask for and receive an explanation on any point which is not clear. Your employer can not indemnify you after the fact in loss or damage matters of private concern.

### Some Questions And Answers

There are some areas not covered above in which employees are sometimes concerned. Here are some typical "Qs and As":

- Q: I've heard that in some countries even the best accommodation available for our people is "the pits". What is being done to eliminate this problem?
- A: There have been major improvements in the last several years and cases where deficiencies exist are being addressed as fast as financial and personnel resources permit. Sometimes the problem rests within the host country. Although your employer is constantly making representations to the local authorities, progress is frustratingly slow. Usually this is due to the fact that restrictions exist on the acquisition of property. If the situation is grim, you may be entitled to receive a **Deficiency Adjustment** which is a reduction in your Shelter Cost. Administrative Circular Documents Numbers 31/79 and 32/79 provide the background information and instructions you should follow to apply for a deficiency adjustment.
- Q: I sometimes lose money at the bank when I exchange Canadian dollars to purchase the local currency needed to pay my Shelter Cost. Can I be reimbursed?
- A: Certainly. Make sure you get a receipt from the teller and submit a claim to the post administrative officer. Because the amounts are normally small, it may be more convenient for all if this were done quarterly or three times a year. You are, however, entitled to pay your Shelter Cost in Canadian currency if you so wish.
- Q: Why do I have to pay for my own firewood when other utility charges are included in my Shelter Cost?
- A: All utilities, except telephone, are indeed included. So is firewood but only when that is the primary source of heating your accommodation.
- Q: Can I obtain an advance if my landlord requires me to pay my rent quarterly rather than monthly?

A: You and post administration should try to persuade your landlord to be more flexible. If that is not possible, your rental ceiling amount or actual rent may be paid to you on a quarterly basis. You would, of course, still be required to pay your Shelter Cost at the beginning of each month.

Q: When am I entitled to Safe Storage Expense Benefits under FSD 28?

A: At many posts, the prevailing crime level is such that the likelihood of burglary or unlawful entry increases where accommodation is left unoccupied for lengthy durations. FSD 28 provides for safe storage or custodial services under certain conditions for some or all of your household effects or personal articles when you are absent on leave or for operational reasons.

Warning - Safe Storage Expense Benefits are not a substitute for private insurance. You are again advised to purchase the most comprehensive coverage you can afford in order to minimize the effects of possible losses.

#### 4.1.3 LOSS AND DAMAGE CLAIMS

When the time comes for the local Movers to deliver your shipment to your Staff Quarter, you are again entitled to time off with pay in order to supervise the unloading and unpacking. Don't be intimidated by local customs. Assert yourself and make sure that things are being placed where you want them to go. If language is a problem, there will usually be someone at the post who can come down to interpret. Remember that your entitlements under FSD 15 include unpacking and removal of the crates, cartons and packing material by the delivery persons. When you are asked to sign for receipt, note any obvious discrepancies or damages and make sure you understand what you are signing.

Once the movers have gone, you (and your spouse) should examine your shipment more carefully and check each item off against your Inventories. Where an item is missing or damaged, record its Inventory particulars plus a complete description of the damages on a separate piece of paper. You will need these details to submit a claim.

Just to recap for a moment, remember that you have up to \$50,000 of all-risk insurance under FSD 15 for all or most of your possessions in transit and up to \$50,000 for those in long-term storage. The term "in transit" means the period from the day the goods are removed from your previous residence to the day you accept them at their final destination. Before filing a claim for loss or damage, it is recommended that you familiarize yourself with Sections 15.19 to 15.26 of the Directives and read the APRF Guideline on this subject. Unless you follow established

procedures very carefully and within the time limits set by the Carriers or the Crown and Its Underwriters, you will invariably encounter frustrating delays and may lose out on reimbursement. It is your own responsibility to pursue claims directly against third parties but post administration and, if necessary, headquarters should be immediately consulted if you are encountering serious difficulties or a lack of cooperation.

### Procedure to Follow

In all cases, the first step is to make a claim against the Last Carrier of your shipment. Notify the Carrier's agent of your intentions by telephone or telex and then follow up with a registered letter. You will sometimes be provided with a special form to complete and return but, in the interval, your written description of the lost or damaged goods will suffice.

Note - At some posts, Locally Engaged Staff from the mission may deliver shipments to the employee's residence. These persons are not considered to be the last Carrier.

Note - Insurers will sometimes prefer to repair or replace something damaged in transit, themselves, rather than pay you for its replacement. The cost of obtaining estimates for repairs is claimable under FSD 15.31.

Because the liability of Carriers is limited in most cases, it is likely that you will get only a partial settlement of your claim from the last or any previous Carrier involved with the shipment of your effects. You may therefore be faced with the prospect of pursuing claims against two or three other Carriers before you are indemnified. There is, unfortunately, little that can be done to avoid this time-consuming process. In any event, your next step after pursuing the last Carrier is to notify your employer or his underwriter as outlined below.

### Claims Against The Crown

This sub-section applies to relocations between all countries except between Canada and the continental United States. Notice of intention to claim for loss or damage must be made to APRK within 30 days of the date you take possession of your household effects. This should be done first by telex and then by dispatching form "Intent To Claim" via airmail or departmental courier. Your actual Claim must be submitted no more than 90 days later and must be supported by a Statutory Declaration containing the following information:

- (a) circumstances giving rise to the claim;
- (b) extent of damage or loss;
- (c) amount claimed in respect of each item;
- (d) a report on any settlement made by a carrier including evidence that a claim for loss or damage has been made against the last carrier, except where evidence exists that a previous carrier may be responsible e.g. evidence of poor packing;

- (e) a report on any settlement made under personal insurance policies.

Receipts, letters from carriers and other documentary evidence will be required and should ideally be attached to your Statutory Declaration if available at the time.

### **Claims Against The Crown's Underwriters**

This sub-section applies to relocations between Canada and the continental United States, to relocations within the United States and to goods subsequently removed from storage in Canada and delivered to you in either country. Intent to claim for loss or damage must be submitted in writing to the Mover and the Underwriter within 7 days of receipt of your effects. Posts in the United States and APRK have supplies of "Insurance of Household Effects" forms which may be used for this notice of claim. You will already have your Mover's address on the receipt you signed when your shipment was delivered. The address of the Crown's underwriters is:

Reed, Stenhouse,  
759 Victoria Square,  
Montréal, Québec,  
H2Y 2K2.

Within two weeks of receiving your notice of intent to claim, the Mover and Underwriters will send you detailed claim forms to complete and return. The mover's liability is generally limited to between 30 - 60 cents per pound for each article lost or damaged. The Mover is obliged to dispose of your claim within 60 days of receipt of a properly documented form. The Crown's underwriters will pay for the repair or replacement of lost or damaged items subject to the maximum amount and exclusions indicated in FSD 15.

### **Claims Against Private Insurers**

As a general rule of thumb, such claims follow much the same procedure as claims made against the Crown's underwriters. However, it is up to you to acquaint yourself with the Company's Policy and communicate with your Agent on your own.

### **Automobiles**

When your car finally arrives and is unloaded dockside, do not accept custody until you have carefully inspected it and made written observation of any damage or loss. As in the case of your other effects, notice of intent to claim should be cabled or telephoned immediately to the Carrier, his local agent and your insurer. Follow up by registered mail.

### **Accountable Advances**

In cases where there is considerable loss or damage, APRK has the authority to advance you funds pending settlement of your Claim (FSD 15.25).

### **Summary**

You are advised to take action to file claims immediately; this advice cannot be taken lightly since failure to follow instructions and keep within time limits invariably result in personal difficulties and financial losses.

Patience and perseverance are very often the key ingredients needed to get through Loss and Damage Claims procedures. This whole area is being carefully reviewed by Departmental management with the Treasury Board to determine where streamlining is possible.

## 4.2 POST MANAGEMENT AND ADMINISTRATION

### 4.2.1 ORGANIZATION OF THE POST

Based on the importance Canada attaches to its presence in the Host Country, there may be an Embassy or High Commission and one or several Consulates at which programs such as General Relations, Employment and Immigration, Trade, Aid and others are carried out. Each program has a manager who is responsible to the Head of Post - the Ambassador (High Commissioner), Consul-General, Consul - for its effective delivery. At smaller posts, there is generally one program manager who is entirely responsible for administrative matters including those affecting the locally engaged staff as well as Canadian employees and their dependents. At medium-sized posts, there is generally an Administrative Officer or Office Manager who is usually a rotational employee. The larger posts have Administration Sections in their own right. These are usually headed by a more senior rotational employee who is supported by a team of Canadian and locally-engaged personnel. Like program managers, those in charge of post administration are equally responsible to the Head of Post. Committees are set up from time to time to monitor various areas of administrative concern such as Accommodation, Security and matters touched on by the FSDs. A Post Management Committee, generally chaired by the Head of Post and composed of program managers and invited employees, meets regularly to review program and administrative matters, formulate solutions to problems and delegate responsibility for making changes.

### 4.2.2 ADMINISTRATIVE PROBLEMS

When you have a problem related to the carrying out of your duties, the person to see is your program manager. If you have problems with your entitlements and obligations under the FSDs, the Post Administrative Officer or Office Manager is generally the one who will be able to help.

The duties of the Post Administrative Officer are no mean task. You will probably find that person is almost always working under pressure and attempting to deal with a dozen situations at once. The administration of any post - from the smallest to the largest - is very difficult, particularly in that the person responsible always has to represent the interests of both management and the employee. The Administrative Officer should have a thorough knowledge of the FSDs, post budgets, standing operational instructions and local conditions. He or she should know the items to which you are entitled and those which, in practical fact, can be provided. Administration is not an exact science and there is often a gap

between expectations and reality. Foreign service is not particularly amenable to uniformly interpreting the rules and regulations in every circumstance and you should be prepared for a little give and take on minor issues. These things tend to even themselves out over the course of a posting.

While it may not always appear that way, most administrative officers do care about your concerns and will do their utmost to satisfy you within reasonable limits. There is no need to have to go begging for favours when a problem arises. Similarly, no useful purpose will be served by shouting or desk-pounding. If you have reached an impasse, take the matter up with your Supervisor. Very often you will find that person is already aware of the situation as he or she was consulted by the administrative officer in order to reach a solution. Most Supervisors will understand your difficulties because they are long in foreign service experience themselves.

More than likely your problem will be resolved by this stage or reasonable efforts will be made to work out a compromise acceptable to all parties. If you are still not satisfied and you consider the situation serious enough to go one step further, the formal grievance system is at your disposal. Booklets on the procedures to follow are available at the post or from APRS .

Note - Some employees in the past have taken the position that if their problem can not be solved, they are going home. Be very careful when considering this action. The Foreign Service Directives specify that in the event of premature return certain major costs, including a portion of Relocation costs and entitlements already issued, may be the employee's personal responsibility to bear. In addition, your decision could also have disciplinary implications. Make sure you know all the ramifications before acting in haste.

### 4.3 PERSONAL ADJUSTMENTS

Fairly soon after you arrive at the Post, you are going to wake up one day and begin to realize just how different things are in comparison with life in Canada. All of the articles you read, the films you saw and the conversations you had with others who have served in the host country are now being put to the test. Many of your expectations have already been borne out but you have encountered a few surprises along the way. Perhaps you are feeling overwhelmed by your new environment and, as a reaction to it all, you are behaving unusually.

This section deals with some of the areas where you and your dependents will have to make adjustments in order to get the most out of your posting. It is not an all-encompassing recipe for survival. Rather, the subject matter is intended to give you some points to ponder and encourage you to think positively. Try to remember that you are not alone and, as part of a Canadian foreign service community, there are others who have a stake in your happiness and who are willing to help.

#### 4.3.1 ATTITUDE

##### FIGURE 15

##### PERCEPTION



Hold this handbook 50 centimetres from your nose and take a good look at Figure 15. What do you see? Is it more than just a collection of symbols?

People quite naturally react differently to the same situation. This is fine so long as one's behaviour is not prone to extremes or consistently goes against the norms of one's peer group. Your attitude towards the people and events you encounter in your new environment is the key to successful adaptation. If your attitude is to constantly emphasize the dark side of things, you are bound to be miserable and have a negative effect on others. Any situation has its advantages. Often it is simply a case of focusing on the bright side in order to get the message.

#### 4.3.2 CULTURE SHOCK

One of the first "attitude" problems you will encounter overseas is Culture Shock. Everyone experiences it to some degree at all posts, even the ones in familiar countries. It is apt to affect your family more than yourself because they cannot seek refuge each day in the operational duties and sheltered environment of the mission. They have a much more constantly "foreign" environment to cope with and the strain is greater.

Culture shock is basically a state of anxiety. It is precipitated when your values - the cultural luggage you bring to the post - comes into conflict with people's values in the host country. It is a sensation of strangeness and feeling detached from all that is familiar. Even the most taken for granted signs and symbols of social intercourse - how to shake hands, how to handle servants, how to express courtesy - will strike you as alien from all that you have been brought up or learned to perform. No matter how poised or how full of good will you are, a series of emotional props has suddenly crumbled. It is not unusual for people to develop gastrointestinal symptoms, get depressed or lose their appetite when suffering from Culture Shock.

The most effective way for you and your family to reduce the effects of culture shock is to be supportive of one another and resolve to learn what it takes to operate effectively in the host country. This requires good interpersonal communication, encouragement and mutual support. At first, getting friendly with your fellow employees and their families will make you feel more comfortable and start the "learning process" in motion. More than likely, you will shortly meet foreign service families from other countries, all in a similar position to your own. In countries where locals are discouraged from mixing with foreign nationals, your links with the expatriate community can be very important. On the other hand, take full advantage of the openness of some societies and start to develop friendships with local people who share the same hobbies or interests as you do. Young children are usually less inhibited than adults and may be the "good-will emissaries" who bring their parents into contact with local people they would otherwise never have met. Church groups, volunteer work, friendship clubs, Canadian Clubs, parent-teacher groups, language lessons, part-time courses and excursions into the countryside are just some of the many activities that help overcome cultural

barriers, cement new friendships and make living abroad a worthwhile experience. Later on, many of you will look back with fond memories and, like many of your predecessors, claim that some of your strongest friendships were developed abroad and are still flourishing.

#### 4.3.3 CHILDREN

Children at the post, particularly younger ones, often experience major adjustment problems because of the newness and uncertainty of their situation. Full parental support is a must. This means prompt establishment of eating and sleeping routines, adequate opportunities for exercise and playing with peers, being encouraged to help out with settling in and being allowed to express fears and anxieties. Your availability and dependability in the early days of a posting will make the youngsters feel more at ease. Children need to know that they can count on their parents "being there" at key times.

#### 4.3.4 SERVANTS

Most Canadians are not used to employing servants on a full time basis and are self-conscious, at least initially, about foreign employees (and possibly their families) seemingly disrupting their privacy. While there are problems associated with keeping household servants, they are often a necessary facet of life in certain countries. Once you get accustomed to one another, they can leave you freer to enjoy your posting as well as help you understand local customs and conditions.

In employing servants, you should rely heavily on the experienced members of the post for advice. Know the local labour laws and make sure any prospective employee is medically examined before you offer him or her a position. References should be checked if at all possible, particularly to make sure they belong to the person presenting them. Read references carefully for omissions. It is usually indicative if something important e.g. "honesty" IS MISSING. If you need several employees, choose your "number one" first. Clashes between servants can be worse than fighting children. You may want to emphasize that it is the head employee's responsibility to ensure that the household functions smoothly. Make sure both you and the employee know exactly what you will provide (quarters, furnishings, etc.) and that live-in servants are expected to keep their quarters clean. Inspect them every once in a while. Generally, uniforms are provided by you. Pay the going wage but, depending on local custom, throw in little bonuses for excellent performance and you will find the excellent performance repeated more and more often. Don't hesitate to withhold a bonus as this will emphasize that your servant will be rewarded for excellent service only. If you need to fire an employee, it may be preferable to offer severance pay and request immediate departure rather than risk retribution during a notice period.

#### 4.3.5 MONEY PROBLEMS

Happiness is impossible when you are constantly worried about whether you can make ends meet. Worries are not simply a matter of how much money you are personally worth; they are a function of your cash flow. To bring Micawber's Equation into its present perspective:

Net income \$300/week  
Net expense \$299/week  
Result: Contentedness

Net income \$300/week  
Net expense \$301/week  
Result: Misery

If you took the time to do some financial planning before leaving your last assignment, you should be able to operate within your budget and have something left over for savings and emergencies. However, if you find yourself in trouble it is a good idea to review your calculations on the personal worksheets in Appendix C. Remember that it is far better to anticipate difficulties and try to resolve them before you become overburdened with indebtedness.

#### 4.3.6 ALCOHOL

Alcohol is so readily and cheaply available in foreign service that it becomes a major problem for some employees and their dependents. On the one hand, warmer climates and social pressures cause many people to consume more alcohol than they should. On the other hand, the stress of a new assignment, culture shock and many other personal difficulties lead some people to drink as a means of escape.

In circumstances where a problem seems to be developing, it is best to seek professional advice without delay. Many people avoid seeking help because they feel ashamed and believe their weakness will cause them embarrassment in their social relationships and careers. Paradoxically, they would think otherwise were they able to watch themselves behave in public while inebriated and appreciate the agony they might be causing their spouses and children.

The first step should be to read the publication "Employee Assistance Program - Policy and Procedures" which is available at the post. The Department can provide professional guidance through its Employee Assistance Program Counsellor in APRN. Approaches to APRN for your own problem or on behalf of someone else are always held in the strictest confidence.

Alcoholism is an illness that can be treated successfully. Ignoring the problem will not make it disappear. Many people in this situation have suffered and overcome their illness after seeking help. Alcohol destroys lives - literally. Do not let it happen to you or your loved ones.

#### 4.4 PREVENTIVE HEALTH CARE

One of the first steps you should take on getting settled in is to establish a professional relationship with a local doctor. Your family's medical history, obtained from your previous physician, will assist the new doctor in responding to your concerns.

Except for a small number of posts, the odds are that you will be exposed to greater health risks abroad than while you are working in Canada. Moreover, even though you may have fairly comprehensive medical plans, there may very well be costs that go beyond the limits of your coverage. The intent of Part VI of the Foreign Service Directives is to offer preventive health services and to supplement your insurance while you are abroad.

##### 4.4.1 MEDICAL AND RELATED EXPENSES

###### Preventive Medical Services Expenses

If you are serving at an "Unhealthy Post" (See Schedule to FSD 38), there is provision for you, your dependents and your household servants to receive a free medical examination, immunizations and most prescribed preventive medicines. These services are normally provided by local physicians in accordance with procedures established by Health and Welfare Canada. In the unlikely event that local facilities are inadequate for the purpose of providing preventive services or conducting an examination under FSD 38, your employee will grant adequate leave with pay for you (and/or your dependents) to obtain medical services while you happen to be away from the post for some other reason such as temporary duty or vacation leave.

This Directive also requires you to undergo a medical examination on departure from an unhealthy post or on reassignment to Ottawa. The procedures and instructions are the same as the FSD 9 pre-posting medicals. Again, you are entitled to see HWC's assessment of your fitness if you wish.

###### Post Attributable Illness or Injury

FSD 39 recognizes that you should not have to go out of pocket for expenses incurred for illnesses, injuries or complications arising therefrom which would not normally be contracted or pose problems in Canada. In such cases, providing you use an acceptable doctor, the Department will reimburse you for those portions of your medical expenses not covered by your health insurance. If you are not covered by

G.S.M.I.P. or comparable plan, you will be responsible for that portion of the expenses that an insurance company would ordinarily have paid. HWC have the major input as to what is and what is not post attributable. In case you disagree, your personal physician at the post can have some input.

Note - Leave for post attributable illness or injury is covered under FSD 47 and is not charged against your annual or sick leave credits.

### Excessive Health Care Costs

FSD 40 deals with the problem of the cost of basic health care overseas being more than it is in Canada and so not fully covered by your health insurance. The normal first step after incurring medical expenses is for you to submit a claim to G.S.M.I.P. When your dealings with them are complete, you may find that a portion of the expenses are ineligible because the fees go beyond the maximum scheduled for such professional services. To obtain further reimbursement under FSD 40, send APRO the summary claim form and receipts that have been returned to you by G.S.M.I.P.

FSD 42 responds to the problem of foreign doctors and hospitals who may not be prepared to wait for G.S.M.I.P. to pay you before collecting their fees. In most circumstances, your employer will advance you the money for six months maximum to bridge the gap between payment of your bills and reimbursement from the insurer. Form 330-18, obtainable from post administration, must be completed when requesting such an advance.

### Health Care Travel

Where local medical care is inadequate or local costs are excessive in comparison to Canada, it may be necessary or cost-effective for someone to travel to a place where more acceptable facilities are available. FSD 41 covers the cost of travel for the patient be it the employee or his/her dependent. It also covers the patient's actual and reasonable transportation expenses between the treatment centre and place of temporary accommodation. In some circumstances, the patient's living expenses in private or commercial accommodation may also be included. Where an escort is authorized, the travel expenses for that person and a living expense supplement are payable.

Authorization for travel under FSD 41 must be sought from APRO, based on consultation with HWC. However, when an emergency exists, the Head of Post, may invoke this Directive. When approved, any travel time required by the employee is also covered and not charged against his or her other credits.

Note - It is important that you read the Instructions following FSD 41.03 very carefully. While it may be a natural human response to want to be with one's spouse or child at the time they are receiving

treatment, the costs associated with attendance are not always provided at public expense. Some typical examples where the expenses for a family member to escort the patient may be approved are:

1. For a parent to accompany his/her very young child where the child will be undergoing treatment;
2. For a very young child who, by reason of dependence, is obliged to accompany his/her parent when the parent will be undergoing treatment;
3. For a husband to be present at the birth of his child where health care travel has been authorized for his wife. (Living expenses are payable for a maximum of five days only.)

When expenses for an escort can not be approved under FSD 41, an alternative for your consideration might be to use the "trade-in" Option provided by FSD 45.

#### 4.4.2 HEALTH RISKS

While health risks differ from post to post, here are some preventive measures which may be useful in your locality (mainly Tropical Posts):

##### **Malaria**

It is possible you may be on prophylactic treatment to prevent the occurrence of this disease. Unfortunately, new strains of malaria crop up from time to time which may prove resistant. Consult your local physician or the HWC doctor at the post for up to date advice based on any changes in the incidence of this disease or the effectiveness of available drugs.

##### **Tuberculosis**

More frequent chest X-rays may be indicated in locations where there is higher incidence of TB than in Canada. Any expenses and leave required for that purposes are covered under FSD 38.

##### **Water**

Unless you are certain that water is potable, you should treat it chemically or boil it for at least ten minutes. Hot water from taps can still contain dangerous bacteria which have not been removed by locally installed water filters.

## Food and Beverages

Most infections can be avoided if food is well-cooked and eaten hot. Raw fruits should be eaten only when they have unbroken skins and they are peeled. Raw vegetables and salads should be avoided, as they are often contaminated with protozoan cysts or helminth eggs. Scrubbing of green leafy vegetables and soaking them in strong iodine or chlorine solutions, then rinsing in boiled water, should eliminate most parasites. Unless dairy products are known to be hygienically prepared and properly refrigerated, they should be avoided. Even when refrigerated, however, custards, cream pastries, potato salads and shellfish should be avoided as they are excellent vehicles for propagation of pathogenic organisms such as salmonella that cause food poisoning. When fresh fruits and vegetables cannot be obtained or eaten, multivitamins should be taken. Eating raw or undercooked local beef, pork, sausage, or fish can lead to trichinosis, tapeworm, or fluke infections. Smoking, salting, pickling, or drying meat or fish alone is not effective, but heating meat or fish to at least 55°C for 1 hour, or freezing at minus 10° for 20 days is an effective remedy.

Unless you are advised to the contrary, assume that bottled soft drinks, including some well-known brands, may be contaminated. Bottled water is generally safer than untreated tap water, but this water can also occasionally be contaminated. Alcoholic beverages are safe but their presence in mixed drinks does not kill organisms. Hot tea and coffee and hot milk are also safe drinks.

## Diarrhea

One of the main effects of ingesting contaminated food or water is "the runs". There is some controversy among medical personnel on how to handle this particular problem without making an exact diagnosis of the specific organism and this is often impossible especially in the countries where diarrhea is most prevalent. Many diarrheas are noninfectious and self-limited and may arise from changes in food, water or altitude, combined with fatigue and the emotional stresses of departure and arrival. This type of diarrhea often clears up on a bland diet, with particular avoidance of fats and alcohol. The important factor in treating any diarrhea is to replace the lost fluids by drinking uncontaminated water, tea, broth, or carbonated beverages. Useful drugs to relieve excessive diarrhea and cramps include Lomotil and Kaopectate. Lomotil is not recommended for young children and may worsen the symptoms of bacillary dysentery. Pepto-Bismol, in doses of 1 ounce every half-hour until eight doses have been taken, has been found to have a favourable effect on the course of diarrhea caused by toxigenic E. coli, probably the leading cause of travellers' diarrhea. A physician should be consulted when diarrhea is severe, accompanied by blood or mucus or persists for more than three days.

## Schistosomiasis

Where this parasitic disease occurs, all bodies of fresh water must be considered to be infected and all contact with untreated water must be avoided. However, parasites cannot be contracted in salt water or in adequately chlorinated swimming pools.

## Sunstroke and Heat Exhaustion

Can be avoided by abstaining from prolonged exposure to the sun or overly strenuous exercise. Be sure to wear a sun-hat and loose fitting, absorbent light-weight clothing. It is useful to drink more fluids and to add salt to the food or to use salt tablets. Not all sun tan lotions are effective and may actually contribute to burns. Perhaps the most effective nonopaque sunscreens are those containing 5 percent Para-Aminobenzoic Acid in ethanol.

## Insects

Since insects are some of the main carriers of disease, as well as being a great nuisance, windows should be screened. Where this is not possible, mosquito nets may be used. In some places, to avoid being bitten excessively, it is best to stay indoors as much as possible at night or to wear clothing that covers the arms and legs. Insect repellants applied to the skin and on clothing may be of great value. Those containing diethyltouamide (such as Off) are recommended.

## Stray Animals

Children should be cautioned not to befriend stray dogs, cats, or other animals overseas. Rabies is a common problem in many countries and street animals are a reservoir of that disease. It is hard to avoid the appeal of cute, obviously underfed, animals, but it must be done.

## Flora and Fauna

Children and adults alike should familiarize themselves with poisonous species. Many of the most lethal varieties are the most attractive looking or brightly coloured. Immediate medical attention should be sought for any animal bites or following contact with or ingestion of unknown or poisonous fruit, berries, nuts or plants.

## General

Be prepared. Keep a first aid kit accessible in your home and take one along on outings. (See Appendix E for a sample of what should be included.) Post the numbers of your doctor, local hospital, poison control centre and other key contacts close to your telephone.

## 4.5 LEAVE AND TRAVEL ASSISTANCE

This section deals with personal leave, travel assistance and involuntary departures due to emergencies or exceptional circumstances.

### 4.5.1 FOREIGN SERVICE LEAVE AND TRAVEL ASSISTANCE

One of the most significant areas of change in the 1982 FSDs is the new package of travel and leave provisions designed as an incentive for service abroad. More frequently than ever before, you now have the opportunity to get back to Canada or travel to some other destination during your posting. What is equally valuable is that you have greater flexibility to make whatever arrangements you consider best meet your personal or family circumstances.

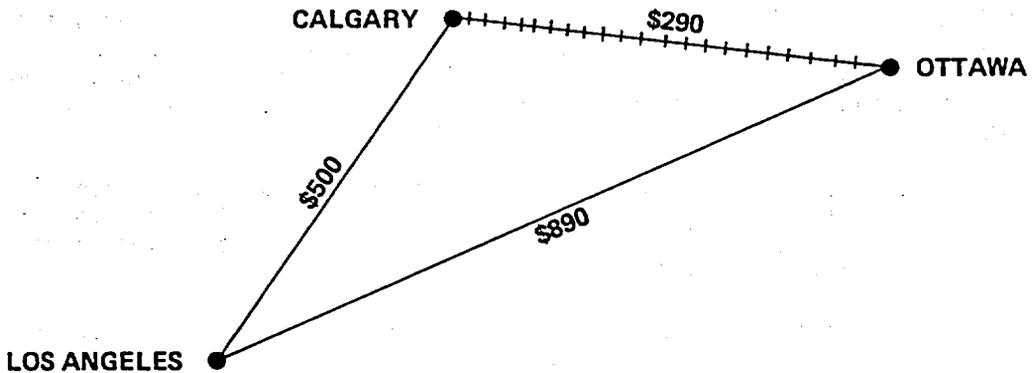
Applications for annual leave per your collective agreement or Foreign Service Leave under FSD 45 are submitted to your supervisor for approval. Requests cannot unreasonably be denied but operational requirements and the leave entitlements for other employees at the post must be considered. While accrued leave credits are portable, your entitlement to Foreign Service Travel Assistance under FSD 50 lapses on the termination of each posting. It is, therefore, wise for you to make your intentions known as soon as possible to avoid later disappointment.

#### Foreign Service Leave/Option

As you already know, Foreign Service Leave credits earned under FSD 45 can be used or retained like ordinary annual leave credits and they may be cashed in once per fiscal year. However, any time you are abroad and have accumulated enough credits, you have the Option to trade ten days of Foreign Service Leave for a transportation expense benefit up to the cost of one adult return economy air ticket between your post and Ottawa. The actual amount of your transportation expense benefit will be calculated on the day you choose to exercise your option. How to use that benefit is entirely up to you (See Figure 16). Travel can be to any destination and by any means of transport and the ticket(s) purchased may be used by anyone. However, all tickets must be used at the same time and the departure point or destination must be your post. Note that the transportation expense benefit means commercial transportation costs only e.g. air, rail or bus fare or car rental and does not include items like meals and accommodation. You will be required to account for your expenses by submitting vouchers or passenger ticket receipts.

FIGURE 16

FSD 45 - FOREIGN SERVICE LEAVE/OPTION



- - means full adult economy return air fare
- +++++ - means full adult coach return rail fare  
(One-way fares are half the stated return fares)

This is a hypothetical example of how a single employee posted to Los Angeles with parents in Calgary and friends in Ottawa could use the Option under FSD 45. (The amounts given here are unofficial but reflect approximate fares in effect during Spring and Summer 1982 using Canadian carriers. You may find it useful to make your own schematic diagram and plug in the appropriate fares in effect at the time you contemplate travelling. Suggestions: Shop around for bargain fares such as APEX, Skybus, Unlimited Mileage, etc.).

In this example, your transportation expense benefit is \$890.  
You could:

- (a) visit your friends in Ottawa;
- (b) buy a ticket for a friend in Ottawa to visit you;
- (c) pay an extra \$110 and buy tickets for your parents in Calgary to visit you;
- (d) visit your parents in Calgary and apply the remaining benefit towards a car rental for a vacation together in any number of places;
- (e) fly to Ottawa to visit your friends; take the train to Calgary to see your parents; fly back to Los Angeles.

## Foreign Service Travel Assistance

This directive combines certain travel provisions of the former (1979) Canadian Leave and Vacation Travel Assistance Directives with some new features. FSD 50 applies to you and your accompanying dependents at the post. Where educational facilities at the post are not compatible and you have dependents attending school away from the post but not in Canada, those dependents are also eligible for benefits. Here are your entitlements:

1. Return to headquarters at the completion or termination of each posting. Should you be requested to defer your return for operational reasons, you may use this entitlement during the next posting;
2. Return to headquarters or to an alternative destination in accordance with the following frequency:
  - at A-Level (non-hardship) posts, once per tour of duty of three years or more,
  - at Level I or II hardship posts, once per two year tour of duty, twice per three year tour of duty plus one trip for each additional year beyond three years,
  - at Level III and IV hardship posts, once per year;
3. For employees serving at Level III and IV hardship posts, an unaccompanied baggage allowance of up to 20 kilograms for the employee and each accompanying dependent.

The following conditions apply to Foreign Service Travel Assistance:

1. Travel (under entitlement Number 2 above) may be undertaken at any time during a posting but lapses on the termination of each posting;
2. Return travel to a destination other than headquarters is reimbursable only up to the cost of a full economy round-trip air ticket between the post and Ottawa.
3. Travel expenses, i.e. meals and accommodation are reimbursable as for Relocation under FSD 15. The number of stopovers is limited to the number associated with air travel via the most direct route between the post and Ottawa;
4. If travel is undertaken by car, you may claim actual and reasonable automobile operating expenses or the "employee-requested" kilometre rate in effect at your point of departure;

5. A minimum of ten compensation days of leave must be taken;
6. If you have used Foreign Service Travel Assistance and terminate your posting early for personal reasons, you may be required to reimburse the Crown for all or part of the expenses previously incurred on your behalf.

You may be covered by special transitional arrangements if you were already at your post on April 1, 1982. These are:

1. The option of travelling to your Canadian Leave Centre (rather than headquarters) in conjunction with your next Relocation. Should your employer direct you to defer such travel for operational reasons, you may travel to your Canadian Leave Centre from your new post within twelve months following relocation, or you may obtain an additional FSD 50 travel benefit for use during your new posting.
2. The number of years remaining in your current tour of duty will determine the frequency of your assisted travel. However, you will be entitled to at least one trip during the remainder of your posting if you are placed in a less advantageous position under the 1982 Directives than you would have been entitled under the 1979 Directives.

#### 4.5.2 FAMILY REUNION TRAVEL

FSD 51 - Family Reunion Travel - attempts to minimize the effect of separation caused whenever an employee accepts an assignment on an unaccompanied basis or, more commonly, where a dependent child is attending school away from the post. The benefits offered are up to three return trips (travel expenses paid) per twelve-month period (01 September to following 31 August) between your post and the location of your dependent(s). Appendix D provides a summary of all possible circumstances and entitlements. Take note that no benefits are available in some situations and that the age of your child on September 1 of a given year may affect the number of travel entitlements in the following twelve-month period.

If the frequency of travel is one trip in twelve months, the benefit may be utilized at any time of the year. Where the frequency of travel is twice or three times per twelve month period, it is normally expected that one trip will be undertaken during a student's long vacation and the other(s) in conjunction with long holiday periods such as Christmas or Easter breaks.

The intent of FSD 51 is to provide children with the opportunity to travel to their parents' location at the post and not to enable employees or their spouses to obtain additional personal travel opportunities.

Moreover, the concerns of employees in getting back to Canada (or to their children) more frequently have been alleviated by increased travel entitlements under FSD 50 (Foreign Service Travel Assistance) and the FSD 45 option to trade in leave credits.

There will, however, be rare instances where unusual circumstances at the post are not conducive to children travelling to their parents' location. In such instances, your employer has the discretionary authority to approve travel to the child's place of residence for you and/or your spouse or for all of you to meet at a third location. When this happens, it is important to remember that your other dependent children lose one of their own travel entitlements. (See Guideline at FSD 51.06).

Family Reunion Travel is administered by APRO to whom proposals must be submitted before authorization to purchase tickets may be obtained.

#### 4.5.3 EMERGENCIES

##### Compassionate Travel

Separation from our loved ones at a time of crisis is one of the greatest emotional difficulties we face during our lifetimes. Under pressing circumstances, we must carefully weigh the need for our presence against the personal costs involved. All too often, the final decision is not an easy one to make.

FSD 54 recognizes that situations of a compassionate nature may arise while you are overseas causing you to be exposed to costs over and above those incurred if you were residing in Canada.

Depending on the location of your family and the nature of the emergency, it is important for you to realize that benefits may be very limited and not applicable to all persons whom you might wish to be included. For this reason, you should try to put aside a reserve fund to cover the cost of travel to the appropriate place in the event of a situation arising not covered under FSD 54. Remember, also, that you may be able to trade in leave under FSD 45 or get travel assistance under FSD 50 or FSD 51 to ease your difficulty.

Note - Employees have expressed the opinion that it is harsh to deduct the travelling expenses between Headquarters and the location of your relative (or, in case of death, under FSD 66, the interment) from the expenses associated with travel between the post and Headquarters. Try to understand that FSDs 54 and 66 are not intended to compensate you for all financial inconvenience during personal grief, but only that portion resulting from foreign service. Keep in mind that if you were serving in your headquarters city, you would be exposed to the same costs as those for which you are responsible under FSD 54 while on posting.

## Communication

If you are uncertain as to the extent of a personal crisis or wish to obtain further information before deciding to leave the post, you are very welcome to contact the Department's Personnel Welfare Counsellor (APRW). Very often, a report from some one closer at hand to the problem and not part of the family can ease your mind tremendously. Our Counsellor maintains contact with many organizations who can help resolve problems. She is sympathetic, approachable and always willing to assist.

In the absence of suitable alternatives, your Head of Post is authorized to permit the use of Departmental Telex facilities in case of an emergency. While death and illness in the family are obvious examples, consideration may be extended to urgent financial and other matters that may develop as a direct result of a posting.

## Evacuation

There have been rare but highly publicized occasions where some or all of our employees and their dependents have had to get away from their post on very short notice. The main cause of emergency evacuation has been a state of war or a level of hostilities considered dangerous to public safety. However, it is also possible that evacuation may be necessitated by natural acts such as earthquakes or flooding. Authority is vested in the Senior Officer at a post to authorize emergency evacuation under these circumstances.

FSD 64 - Emergency Evacuation and Loss - is designed to provide for your evacuation, temporary living expenses, safeguard your possessions and compensate you for any resulting loss. In general, instructions are similar to those contained in FSD 15 but special procedures and authorities are included to cover exceptional hardships. For example, you are deemed to be on temporary duty until you are resettled, you may be eligible for larger accountable advances and recovery of your posting loan balance is held in abeyance. As in the case of claims for damage or loss following relocation, your inventory of personal effects is most important in order to obtain adequate compensation under this directive. If your possessions are subsequently recovered, you will have to decide as to whether or not you wish them returned. Compensation may change depending on your decision and you may end up in a position of having to repay some money if you used your accountable advances to acquire replacement items.

## Death

Special provisions exist under FSD 66 - Death Abroad of An Employee Or His Dependent - to assist the survivor(s) in the event of the ultimate crisis. In general terms, this means the employer will authorize payment of specified expenses over and above those that would normally have been incurred had death occurred in Ottawa. These expenses, less any amounts payable under workmen's compensation or other laws, are specified:

1. Transportation expenses for repatriation of the body from the post to the place of interment minus the transportation expenses that would have been incurred between the place of interment and the headquarters city;
2. At the place where death occurred, the costs of an:
  - (a) ambulance or hearse
  - (b) embalming
  - (c) cremation
  - (d) outside case for a coffin
  - (e) any other excess essential costs

Note - Despite the intentions of the deceased and/or the survivors, local climatic or sanitary conditions may dictate that burial must take place fairly quickly or cremation may be prescribed. The problems associated with returning a body to Canada are also made more difficult due to availability of transportation and the sheer distances involved. If return to Canada and interment there are contemplated, it is advisable to contact a funeral home without delay and, if possible, have a relative or friend on hand to meet you. Note that burials may not be possible in certain parts of Canada when the ground is frozen. Costs associated with keeping the body pending burial are at the family's expense.

Note - Transportation expenses for return to Canada for eligible family members or, in certain circumstances, for an escort are payable under FSD 54. Upon completion of affairs at the place of interment, family members may return to the post or place of study as the case may be. Where an employee dies, certain provisions of the FSDs will continue to cover the family members until it is practical for them to make arrangements to leave the post on a final occasion.

Note - In the event of death of an employee, it is advisable for his or her spouse, next-of-kin or executor to communicate with the Assignment Officer in APO.

#### 4.6 PREPARING FOR FINAL DEPARTURE

You have now reached the stage in your posting cycle where your assignment officer has informed you that you are to be cross-posted or will return to Canada. Because you are away from Ottawa, you will not have available to you all the resource people that you consulted during your Rounds. Almost all of the responsibility for getting things done smoothly will rest entirely with you and post administration.

The best way to start preparing yourself is to return to the earlier Chapters of this Handbook, especially Chapters Two and Three, and work through the Pre-Posting Checklist in Section 3.1. In Ottawa, APRR will help coordinate your move by an exchange of telexes with your current post and, if applicable, your new post. In the event that further consultations are required, you can refer to Appendix B - "Who Does What In Headquarters?" - and have your administrative officer send off a telex to the appropriate section. Hopefully you will feel more confident than on your last Relocation and be able to make your experience work more to your advantage this time around.

As a final note, one or several of the following situations may apply to you and some additional information is provided for your guidance:

##### **Retirement/Superannuation**

It is recommended that you give APRN approximately six months notice of your intention to retire if you decide to do so while you are posted overseas. If you are between the ages of sixty and sixty-four and were unable to take advantage of a retirement seminar held in headquarters, you will receive a retirement letter and descriptive literature, together with an estimate of your superannuation. Write to APRN if you have not received your letter by mid-year. Other employees who are contemplating an early retirement may also obtain this information.

Employees contemplating retirement to a location other than the Headquarters city will be pleased to note that FSD 15 has been changed under the 1982 Directives and now provides the full relocation benefits up to the cost associated with relocation between the Post and Ottawa/Hull.

##### **Posting-Briefing Centre**

In order to facilitate the return of employees and their families to Canada, APOB is implementing a program called "Preparation for a Posting to Canada". This program will include:

- Pre-Return Information Kits sent directly to the post a few months prior to scheduled departure; the kit contains general information on topics like the housing situation, availability of public and para-public services, and educational facilities in Ottawa and Hull.
- On return to Headquarters, a second information kit will be made available dealing with Cultural life in the Capital Region, Doctors and Dentists accepting new patients, and other useful advice.
- A series of briefings offered several times each Fall on topics such as The Culture Shock of Returning, Adaptability of Children and Departmental Restructuring and Changes.

### **Dependents Re-entering The Work Force**

Posts with a Social Affairs presence will possess up to date information about job openings in Canada and dependents are entitled to tap the material on hand. Services of Canada Employment Centres are available on return. Why not have a chat with one of the Officers before you leave.

If you are subject to professional or licencing requirements as a condition of employment, you should reconfirm your eligibility at least three or four months prior to departure.

The classified sections of the Ottawa Citizen or Le Droit will give you some idea of the supply and demand in the current job market. Another helpful publication might be the Careers Supplement to the Globe and Mail. Most of the jobs which attract your attention may not be available by the time you return to Canada. However, if you start sending out your resumé about a month before arrival and explain your circumstances to the prospective employer, there is a fair chance you will be invited to attend an interview.

### **Education**

The Foreign Service Community Association has produced an excellent report on education facilities in the Ottawa/Hull area and covers topics like Day Care Centres, Nursery Schools, English and French Language facilities, Universities, Adult Education and services for children with learning disabilities.

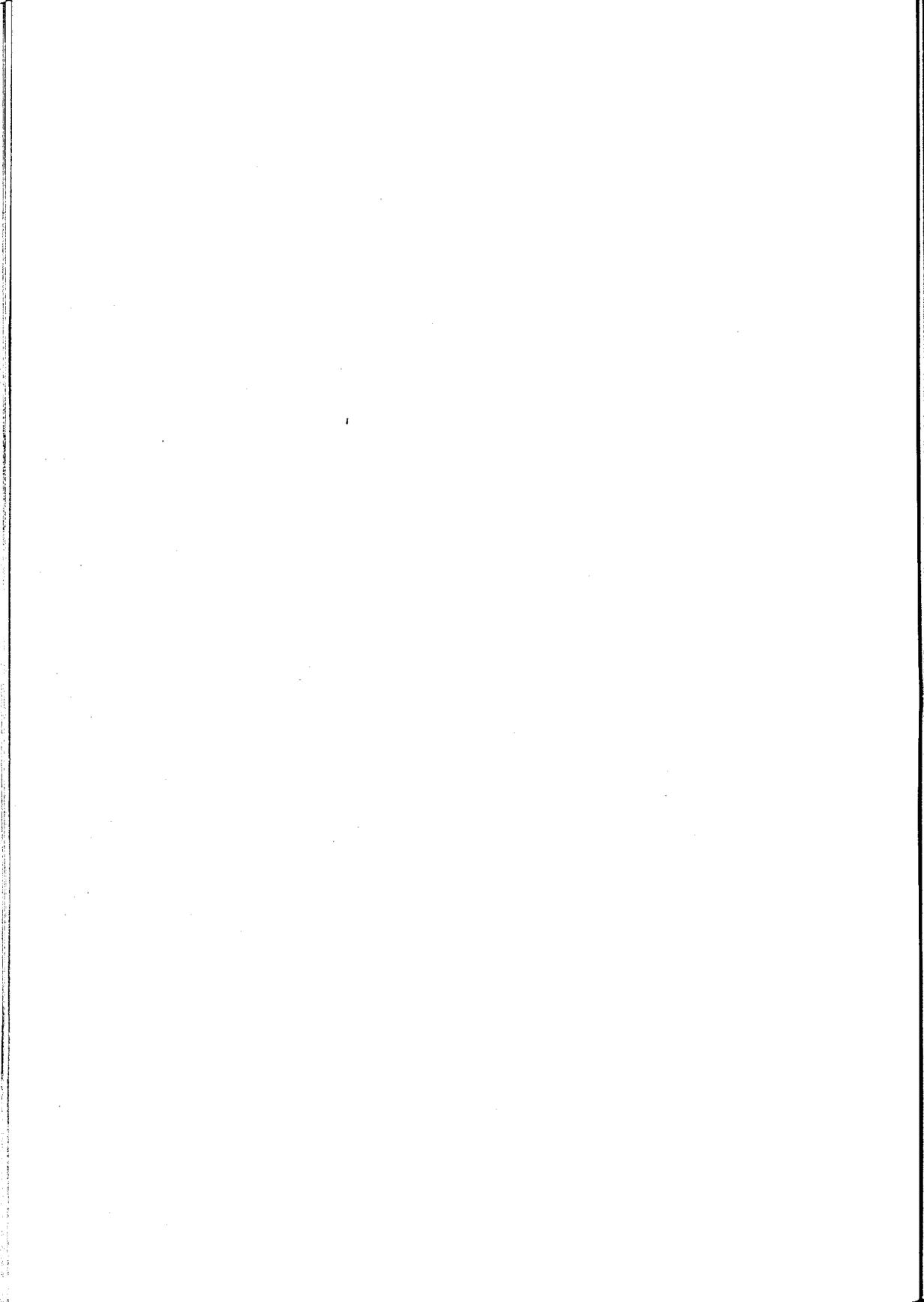
### **Housing**

Current newspapers will give you a fair picture of the prices and availability. Immigration Counselling Officers receive publications from Realtors and may have a copy of "Moving To/Démenager A: Ottawa/Hull

which contains valuable information. Some of the larger Moving Companies and Van Lines often publish their own brochures and will send you one on request.

#### **Admission Of Non-Canadian Dependents**

Canadian citizens and, with rare exceptions, permanent residents of Canada (landed immigrants) have a right to return to Canada. Your dependents who do not fall within these categories will need a visa if they wish to reside in Canada. Check with the responsible Social Affairs Officer and allow ample time to meet visa issuance requirements.



## **Glossary**

## **BILL OF LADING**

The combined receipt for your personal and household effects and the contract for their shipment.

## **CALCULATION OF INTEREST**

There is currently a wide spread in rates of interest offered by commercial lending institutions. The most competitive rates are normally those available on loans fully secured by collateral; the highest are generally those payable on overdrafts and credit card balances. Some loans carry a fixed interest rate for the duration of the repayment period; others offer a fluctuating rate. Posting Loans carry a fixed interest rate. They are repaid in equal monthly installments of blended principal and interest so that the interest rate is applied to a constantly reducing balance over the repayment period.

## **CARRIER**

The transportation company or companies which undertake to bring you and your accompanied or unaccompanied baggage (including household effects) from one place to another.

## **COMPARABILITY**

One of the two main principles upon which the Foreign Service Directives are based. It recognizes that, insofar as is possible, an employee serving abroad should be placed in neither a more nor less favourable situation than he or she would be if serving in Canada. However, it is often limited in its application by circumstances which both the employer and employee are powerless to control.

## **CULTURAL ADAPTATION**

This refers to the stress and anxiety associated with changing one's lifestyle from one milieu to another including a return to Canada following a tour of duty. Although Section 4.3.2 of the Handbook deals with "culture shock", employees and their dependents (especially those going on their first posting) should try to attend a workshop or view a videocassette on this topic. APOB will make the necessary arrangements.

## **FREIGHT FORWARDER**

A company specializing in the shipment of household effects and small inventories. The Freight Forwarder will make arrangements with one or several Carriers to route and ship your possessions from one place to another.

## **INCENTIVE-INDUCEMENT**

The second of two main principles upon which the Foreign Service Directives are based. It acknowledges that extra allowances or entitlements are needed to attract and keep employees in the foreign service and to recognize the undesirable conditions that exist at some posts.

## **NATIONAL JOINT COUNCIL (NJC)**

This body, established by Order-in-Council, was designed to promote the efficiency of the public service and the well-being of those employed in the public service by providing for regular consultation between the government, as an employer, and those of its employees who come under the jurisdiction of the Public Service Staff Relations Act. A special NJC Committee on the Foreign Service Directives is composed of representatives from the Official Side - The Treasury Board and Employing Departments - and the Staff Side - relevant Employee Unions. The Committee meets periodically to review the substance and operation of the Foreign Service Directives, provide interpretations of intent, submit recommendations for change to the NJC and act as a redress mechanism.

## **POST CODE GROUP**

A three-letter acronym used for the proper identification of posts on correspondence carried by Departmental Facilities. For example, "BUF" is the post code group for the Consulate-General in Buffalo.

## **POST EDUCATIONAL FACILITIES REPORT**

A report, prepared and periodically updated by foreign service members at a post, providing a general assessment of the educational opportunities and a detailed description of the facilities and standards at those schools which are considered to be compatible with Canadian institutions.

## **POST REPORT**

A report, prepared and periodically updated by foreign service members at a post, providing a broad description of the city and host country, including the following areas: geography; demography; climate; places of interest; personal safety; employment opportunities for spouses; education; religion; social life and recreation; accommodation; community facilities; cost of living; transportation and communication; sanitation and health services; customs regulations and finance.

## **POSTING CONFIRMATION**

The official notification of assignment is indicated on EXT 503 and distributed to the employee, his or her post and over thirty sections in headquarters who are involved with personnel administration. The Posting Confirmation serves the purpose of providing thumbnail information about an employee's length of tour, dependents, marital status for allowance purposes and certifies that removal related funds are available and payment of applicable expenses is warranted.

## **ROYAL COMMISSION ON CONDITIONS OF FOREIGN SERVICE**

Popularly known as the McDougall Commission after its Chairwoman, its members produced a Report in 1981 containing recommendations, among others, on the Foreign Service Directives. Many of the changes included in the 1982 Directives reflect those recommendations and a further examination of proposals, such as an alternative post index system, will continue in the NJC.

## **TAX-FREE ALLOWANCE**

Certain allowances and other benefits are granted under the Foreign Service Directives without the need for employees to declare the cash value as "income" on their annual return to Revenue Canada. In salary terms, the real value of these allowances depends on one's tax bracket. For example, an employee's \$3000 PDA is equivalent to a before-tax income of \$4000 if he or she is being taxed at the rate of 25%.

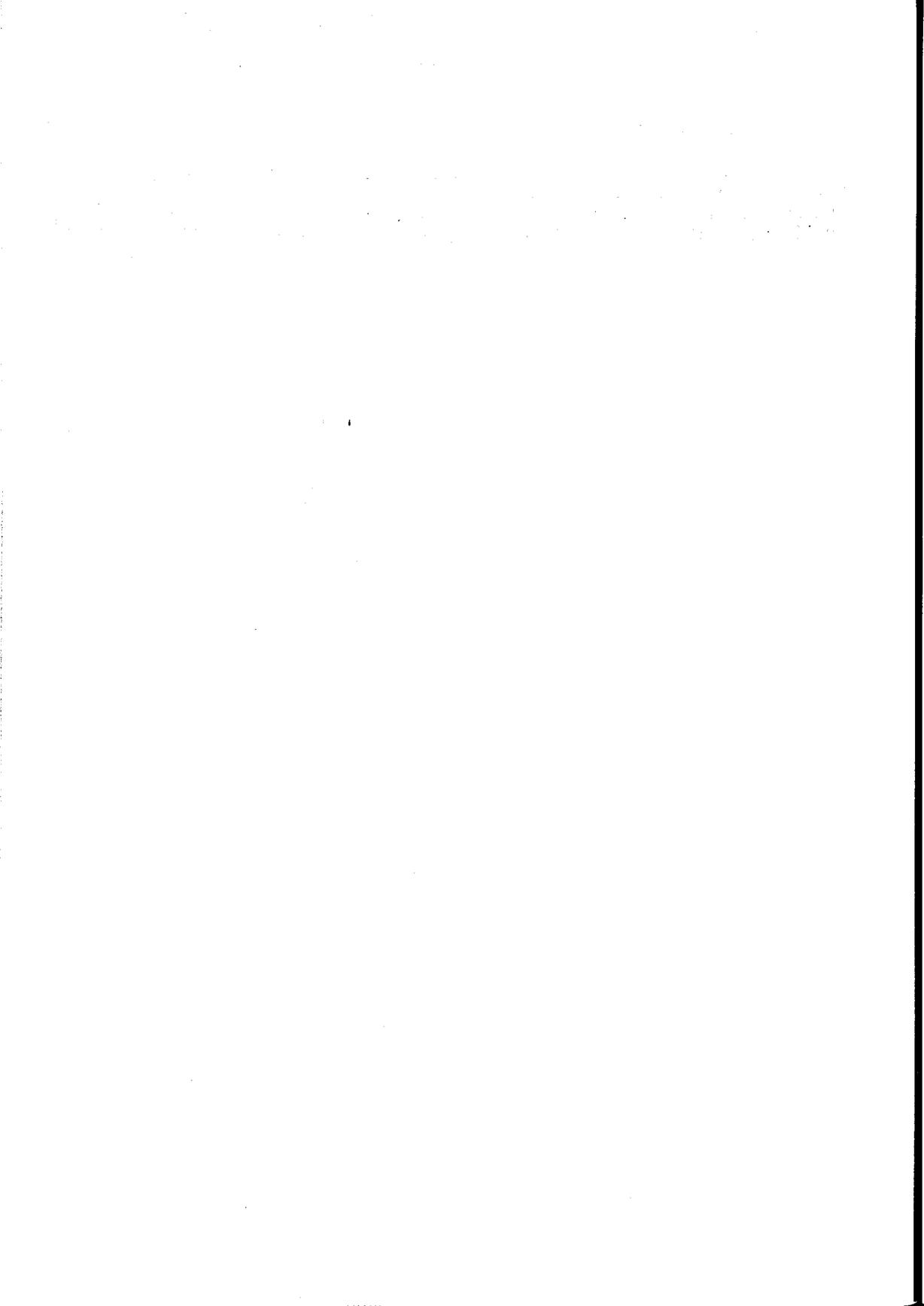
## **TREASURY BOARD**

The Treasury Board of Canada is a committee of six members of the Queen's Privy Council, including the President of the Treasury Board and the Minister of Finance. The Board advises Cabinet on the selection of programs and projects that will achieve the government's objectives in the most effective manner in accordance with its priorities, and promotes the efficient use of the manpower and material resources needed by departments and agencies to carry out their programs and projects.

The Treasury Board is served by two organizations: the Secretariat (the operational arm of the Board) examines all proposed spending programs and keeps them under review, proposes personnel management policy, and negotiates, as the employer, collective agreements with public service bargaining agents. The second organization, headed by the Comptroller General of Canada, is responsible for the quality and integrity of the financial administration policies and practices in use throughout the federal public service.

**VEHICLE OPERATING COST**

The formula now used to determine the cost to the employee for personal use of an FSD 30 automobile is based on operating costs for a sub-compact vehicle as given in the publication entitled Protect Yourself, published by the Québec Office of Consumer Protection.



**Selected  
Bibliography**

## SELECTED BIBLIOGRAPHY

Moysey, JoAnn. Your Move! Toronto: Maclean-Hunter, 1977.

Your Move! provides a distinctly feminine approach to the wrench of uprooting your family. It was written by the Canadian wife of a banker, mother of three children, based on the experience of seven moves in fourteen years - within Canada and abroad. This book is particularly strong on the use of checklists and on providing many valuable tips to avoid the breakage, losses, hassles and extra expenses that can plague any household in transit.

Available in the Main Library (Lester Person Building) under reference TX 307 .M6.

Pfaltz, Marilyn and Reed, Ann. How to Move Your Family Successfully. Tucson: H.P. Books, 1979.

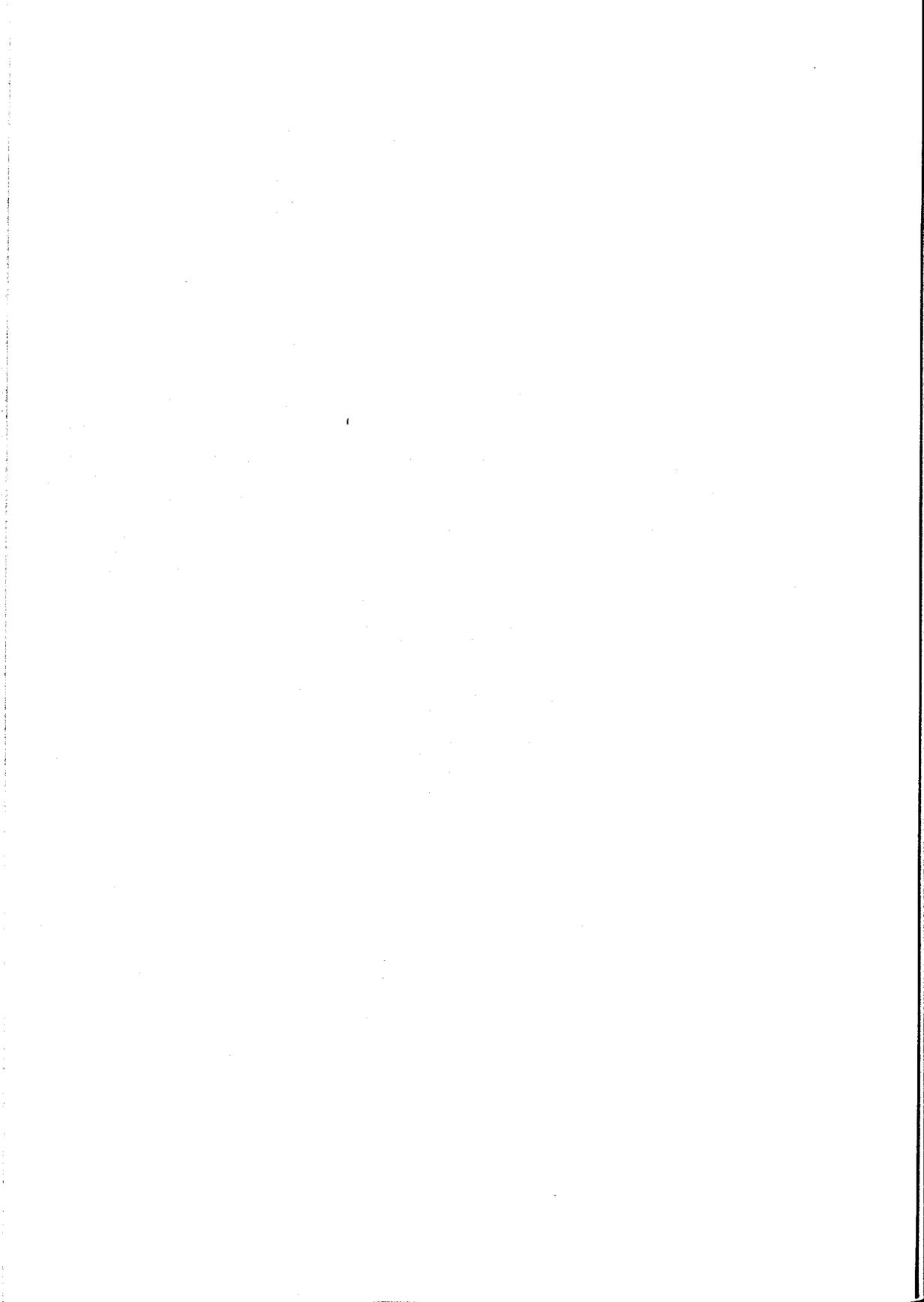
More than 250 charts, tables and photos show you how to choose a mover, select a place to live, buy and sell your home. This book is particularly useful for employees who are contemplating their first purchase of accommodation. It is also strong in providing advice on coping with the social and emotional problems encountered when moving. The authors consulted corporate and military personnel, professional movers and real estate experts when preparing this book. They have lectured, taught and conducted workshops on moving and its problems.

Available in the Main Library under reference TX 307 .P43 c.1.

Waddy, Broughton and Townley, Ralph. A Word Or Two Before You Go. Toronto: George L. McLeod, 1980.

Perhaps one of the most readable and comprehensive guides to the health considerations involved in travel and coping with the risks associated with certain regions, climates, flora and fauna and much more. The authors are two veteran world travelers - a Medical Doctor and a Diplomat.

## **Appendices**



APPENDIX A  
CONDENSED FOREIGN SERVICE DIRECTIVES

For quick reference, there follows a comparative summary of the 1979 and 1982 Directives, showing the main provisions and changes that have occurred.

1979 FSDs

1982 FSDs (CURRENT)

INTERPRETATION

FSD 2

- Definitions of terms used in the Directives.

- Changes not available at time of Handbook publication.

APPLICATION

FSD 3

- Distinguishes between Foreign Service Employees and Foreign Assignment Employees.
- Defines the parameters of application of the Directives.

ACCOUNTABLE ADVANCES

FSD 4

- Employer's Policy is to provide accountable advances for expenses authorized under the Directives.

MEDICAL AND DENTAL EXAMINATIONS

FSD 9

- Obligatory medical and (sometimes) dental exams to determine fitness for posting.
- Exams taken at employee's expense
- Employee entitled to travelling expenses and leave, if necessary.

1979 FSDs

1982 FSDs (CURRENT)

LOANS

FSD 10/11

FSD 10

- Provides financial assistance, to facilitate service abroad for the purchase of items, including an automobile, for the employee's use at the post.
  - Separate posting and automobile posting loans to maximum total \$5,600 to \$6,000 with interest as for loans to Crown corporations set quarterly, fixed for duration of loan, with option to renegotiate interest once during loan period.
- FSD 11 eliminated.
  - Combine loans to maximum 50% salary up to \$15,000;
  - Annual adjustment of ceiling;
  - Renegotiable principal up to maximum once in posting;
  - Interest and repayment commence first day of fourth month after issuance providing interest free bridging loan at start of posting.

RELOCATION

FSD 15

- Employer pays cost of most economical and practical mode of transportation plus expenses for accommodation, meals and related items.
- Employer pays for packing, crating, storage, transit insurance, shipping and unpacking of employee's personal effects and automobile, subject to certain exclusions and weight limitations.

Travel

- Reservations made by employer by most economic means.
  - Employee may claim for gas and oil used for travel by car.
- Reservations by employer or by employee within entitlement based on full economy airfare;
  - Employee may use kilometric rate for travel by car as in travel directive when travelling at employee's request.

1979 FSDs

1982 FSDs (CURRENT)

Shipment of Effects - Weight limits

Present limits based on single or accompanied employee occupying furnished or unfurnished accomodation.

- Limitation on amount which may be returned from post over initial shipment.

- Base weight limits on number of persons in family unit up to five persons
- "Add on" weight limits to be deleted.

Present Limit	Furnished	Unfurnished	New Limits		
			No. in House	Furnished	Unfurnished
Single	2725 Kg	4550 Kg	1	2700 Kg	4600 Kg
Accompanied	3650 Kg	5900 Kg	2	3400 Kg	5300 Kg
			3	3700 Kg	5900 Kg
			4	4000 Kg	6500 Kg
			5 or more	4300 Kg	7100 Kg

Automobile Shipment

- Personal car may be shipped to or from a post except where prohibited in which case two way shipment available or Crown vehicle provided;

- Personal car may be shipped to and/or from a post except where prohibited;

Compensation for Damage/Loss to Personal Effects in Transit

- \$25,000 depreciated replacement cost per relocation;
- Use of third party insurance adjuster only in exceptional cases;
- Claims over \$2,000 require T.B. approval.

- \$50,000 replacement cost per relocation
- Normal usage of local claims adjuster to speed claims processing;
- Claims to be paid to maximum \$50,000 without T.B. approval.

Househunting Trip

- Available for married employees only proceeding to posts to locate personally leased accommodation.

- To be available where cost effective for all employees going to or from posts, at deputy head discretion;

Incidental Relocation Expenses

Certain specified expenses such as converting appliances, connecting telephones, advertising for house, plus \$50 for shipping a pet and up to \$200 for unspecified expenses.

- Up to \$1,800 (indexed annually) for documented expenses attributable to relocation;

1979 FSDs

1982 FSDs (CURRENT)

Relocation on Retirement

When retiring outside Canada, employees may claim:

- Travelling expenses up to post/Ottawa cost;
- Shipment personal effects up to post/Ottawa cost ONLY.

When retiring to Canada:

- Travelling expenses, shipment of effects, shipment of car, temporary accommodation, etc. (all benefits of directive up to post/Ottawa cost).

- For retirement either in or outside Canada, the full benefits of the directive (up to post/Ottawa costs) to location of employee's choice.

REAL ESTATE AND LEGAL FEES

FSD 16

- Reimburses specified real estate and legal fees on sale of principal residence in employee's headquarters city (one occasion only).
- Reimburses specified legal fees incurred when employee purchases a principal residence in headquarters city (two occasions only).

SHELTER

FSD 25

- Provides financial assistance where housing costs (including utilities) exceed Ottawa/Hull.
- Requires employee to pay a Shelter Cost based on a fully serviced unfurnished Ottawa/Hull rental for similar salary and household size.
- Subject to suitability, employee assigned Crown-held accommodation must occupy same as a condition of posting.

- Same basic methodology including deficiency adjustments for substandard accommodation, but add salary bands to \$60,000 maximum for shelter cost/rent shares;
- Adjust rent share on first of month following change in family size;
- Formal occupancy agreement introduced.
- Commuting Assistance transferred to FSD 30.

1979 FSDs

1982 FSDs (CURRENT)

- Rent ceilings established at Posts for privately-leased accommodation based on local conditions, program requirements, employee's salary and household size.
- Shelter cost/rental based on Ottawa/Hull by salary and family size up to five persons in household; adjusted April 1st annually;
- Reduction in shelter cost/rent share where Crown accommodation is deficient;
- Commuting assistance - employee's shelter cost/rent be reduced by 85% of the amount by which actual commuting costs exceed the cost of an "OC Unipass" indexed by the post index."

SECURITY DEPOSIT ADVANCE

FSD 26

- Advance provided to employee where lessor, agency or firm requires a security deposit for rented accommodation or essential household furniture or equipment.

SAFE STORAGE EXPENSE

FSD 28

- At Posts where risk of burglary or unlawful entry may be greater than in Ottawa, the employee will provide reasonable protection for all or part of the employee's personal and household effects during certain temporary absences from the post.

1979 FSDs

1982 FSDs (CURRENT)

POST PARKING EXPENSES

FSD 29 (DELETED)

- Employee pays cost of parking expenses under certain circumstances.
- This Directive now forms part of FSD 30.

POST TRANSPORTATION

FSD 30

- Makes provision for Crown owned automobiles to be used by employees.
- At certain posts where excessive shipping costs or restrictions apply, cars are provided to staff for their personal use at a cost of approximately \$800 per year. (85 cars now under this regime; costs established in 1969);
- Change employee cost to \$1,200 per year (\$100/month or \$5 day) plus operating costs (from April 1/82) and \$1,800 per year from (April 1/83) plus grandfather those at post.
- Reimburse employees directly for commuting costs which exceed the cost of an "OC Unipass".

EDUCATION

FSD 34

- Provides an employee with financial assistance to ensure that dependent children obtain an education approximating as much as possible the standards and costs of education in Canada.

Admissible Expenses

- Admissible expenses are those specified in the directive which are normally incurred in Canada or which are compulsory outside Canada;
- Expand list of admissible expenses;
- Allow up to \$100 per year per child for telephone calls;

Education at Post

- USSEA establishes post ceilings within delegated financial authority; ceilings in excess of delegated authority require TB approval;
- Allow USSEA to establish post ceilings on basis admissible costs at representative school at each post from a list of compatible schools at each post;

**1979 FSDs**

**1982 FSDs (CURRENT)**

Primary Education away from Post or in  
Canada where Facilities at Post ARE  
Compatible

- Admissible expenses up to \$3,000 (for education in third country) or up to post ceiling (for education in Canada);

- Admissible expense up to amount of least costly compatible facility at post;

Primary and secondary education away  
from the Post but NOT in Canada where  
facilities at the Post are NOT  
Compatible:

- Admissible expenses up to public education costs in Ottawa plus board and lodging - (currently total about \$5,000);

- Change limit to amount provided for private school education in Canada.

Secondary Education Away from the Post  
but NOT in Canada where Facilities at  
the post Compatible:

- Maximum allowance up to \$3,000

- Change limit to amount provided for private school education in Canada.

Post Secondary Education in Canada:

- Shelter assistance up to \$2.50 per day;

- Change to \$4.00 per day and adjust annually;

Special Education expenses:

- Where costs exceed allowance ceiling special individual submissions to Treasury Board for children with learning disabilities or handicap.

- Delegate approval authority to USSEA for allowance to educate child with learning disability or handicap.

**EDUCATION TRAVEL**

**FSD 35**

- Employer pays travelling expenses for dependent student where FSD 15 does not apply.

- Unaccompanied baggage allowance increased to 100 kg.

1979 FSDs

1982 FSDs (CURRENT)

SCHOOL HOLIDAY MAINTENANCE

FSD 37

- Compensates an employee for costs of maintaining a dependent student, attending school away from the post, during a school holiday recess.

PREVENTIVE MEDICAL SERVICES EXPENSES

FSD 38

- Provides employee, dependents and household servants at unhealthy posts with periodic medical exams at employee's expense, including immunizations and certain preventive medicines.
- Provides for medical examinations of employee and dependents on cross-posting or return to Canada.
- Employee entitled to travelling expenses and leave, if necessary.

SPECIAL HEALTH CARE EXPENSES

FSD 39

- Employer undertakes to reimburse employee for out-of-pocket expenses attributable to post-related illnesses or injuries which would not normally occur in Canada.
- Consultation with HWC required before approval granted.

NORMAL HEALTH CARE EXPENSES

FSD 40

- Employer undertakes to reimburse expenses in excess of the amount normally covered by G.S.M.I.P..

1979 FSDs

1982 FSDs (CURRENT)

HEALTH CARE TRAVEL

FSD 41

- Protects employee from inadequate medical standards or excessive costs at some posts by providing required travel leave, actual and reasonable travel and other expenses for an employee or dependent to receive treatment elsewhere.
- Advice of HWC normally required before approval granted.
- Where local facilities are inadequate or costs excessive, travel may be authorized to a place where medical service available for patient and medical escort plus small child accompanying pregnant mother.
- Expand provisions to cover travel and living expenses of small child who is obliged to accompany parent on health care travel;
- Expand to cover father to attend birth of child;

MEDICAL EXPENSE ADVANCE

FSD 42

- Provides employee with an advance for payment of expenses pending settlement of claim with recognized insurer.

HOLIDAYS, LEAVE AND PERSONAL TRAVEL

FSD 44

- Entitlement to same number of paid holidays as if employment were in Canada.

VACATION LEAVE/OPTION AND CANADIAN LEAVE

FSD 45/46

- Provides extra vacation leave as a premium for service abroad.
- Provides leave to re-Canadianize an employee and his family and an allowance to help defray costs.

FOREIGN SERVICE LEAVE

FSD 45

- Combine leave provisions of FSD 45 and FSD 46 to provide 10 days Foreign Service leave per year;
- Provide option to cash in credits once per year;

**1979 FSDs**

- 5 days extra vacation leave per year which may be consumed as leave or once in a two year period trade off 10 days accrued leave for an air ticket up to cost HQ/post;
- Canadian leave accumulates at rate of 6 days per year to maximum 36 days - lapses on retirement or becoming non-rotational; granted at discretion of deputy head, usually on completion of posting or on cross-posting, to re-Canadianize an employee and family in Canada.

**1982 FSDs (CURRENT)**

- Permit trade off at any time while abroad of 10 days accrued F.S leave for air ticket (or equivalent) up to cost of economy air ticket post/HQ city - remove time frequency limitations;
- eliminate distinction between rotational/non-rotational staff.

**LEAVE FOR POST-ATTRIBUTABLE INJURY AND ILLNESS**

**FSD 47**

- Authorized absence due to injury or illness which would not normally occur in Canada are not charged against an employee's leave credits.
- HWC determination of endemic illnesses required.

**SPECIAL LEAVE**

**FSD 48**

- Maximum of eight days may be approved for situations which impose hardship beyond that which would occur in Canada.

**VACATION TRAVEL ASSISTANCE/  
FOREIGN SERVICE TRAVEL ASSISTANCE**

**FSD 50**

- Provides employees and dependents at hardship posts with a paid travel entitlement up to the cost of return air economy fare between the post and a designated leave centre.
- Provide same travel assistance to career foreign service employees and non-rotational employees and combines travel provisions of directives 46, 50 and 57 into new Foreign Service Travel Assistance;

1979 FSDs

- Frequency of travel entitlement varies with post level of hardship.
- Travel assistance is available from 85 locations abroad designated as hardship posts - frequency once per tour at level I and II posts and once per year at level III and IV posts; travel is to designated leave centre (London, Paris, Miami, Sydney, Honolulu, Ottawa).
- Canadian Leave travel granted at discretion of deputy head on completion of posting or on cross-posting to a location in Canada, for career rotational foreign service employees and dependents.

(portion of FSD 57)

- Travel for non-rotational employees to HQ city when employee accepts extension or cross-posting.

**FAMILY REUNION TRAVEL**

**FSD 51**

- To minimize separation in families, family reunion travel is provided as follows:

Primary and Secondary

- 2 trips per year for child at secondary level in Canada or where facilities at post are not compatible, up to age 21.

Post Secondary

- 2 trips per year during post-secondary education in Canada, up to age 21;
- 1 trip per year during post-secondary education outside Canada up to age 21;
- 1 trip per year during post-secondary education between 21 and 23 years of age;

1982 FSDs (CURRENT)

- Eliminate designated leave centres in preference to HQ base for determination travel cost entitlement;
- Eliminate time limits during which travel may be taken;
- Travel assistance once per tour at non-hardship posts;
- Travel assistance once per two year tour and twice in 3 year tour at level I and II hardship posts;
- Travel assistance once per year at level III and IV hardship posts;
- Provide travel to HQ city on completion of posting; where employee unable to return to HQ between posting on managerial instruction, extra trip available at new post.

- Extend assistance to allow spouse to travel twice per year where employee on post unaccompanied.

- Three trips for child at primary level where facilities at post are not compatible;

- 2 trips at post-secondary level outside Canada, up to age 21;

1979 FSDs

1982 FSDs (CURRENT)

Child not in School

- 2 trips up to age 19 and one trip from age 19 to 21.

COMPASSIONATE LEAVE

FSD 54

- Travel assistance arising from serious critical illness or death of a parent of employee/spouse or of a member of the family unit - costs reimbursed in excess of those which would have been incurred while serving at HQ.
  - Extend to cases of critical illness or death of family members over 21 to permit travel for all family members to place of illness or death;
  - Extend to friend/family member of a single employee in cases of critical illness or death of an unaccompanied employee;
  - Extend to cases of critical illness or death of a brother or sister of the employee/spouse;
  - Extend to family members to permit travel to treatment centre in cases of critical illness or death of a family member following medical evacuation from post

SALARY EQUALIZATION

FSD 55

- Adjusts employee's disposable income i.e. 55% of salary indexed to reflect the costs at post relative to Ottawa of what employees use at post
  - where index is less than 100, adjustment deducted from premium.
  - Change amount of salary indexed to 50% for salaries in excess of \$35,000;
  - Cease applying index to salary where index less than 100;
  - Continue salary equalization payments during a legal strike situation
  - Full scale review of Post Index system after April 1, 1982.

FOREIGN SERVICE PREMIUM

FSD 56/57

FSD 56

- A tax-free allowance paid as an incentive to serve abroad.
  - Allowance indexed by Post index;
  - Cease indexation of FSP by Post Index and provide transitional arrangements for employes at high index posts on April 1, 1982;

1979 FSDs

1982 FSDs (CURRENT)

- Varies by salary band, length of service abroad and family configuration;
  - Separate lower sub-step in scale of allowances for non-rotational staff;
  - Present table varies from basic \$1,200 per year under \$20,000 salary for salary for single, non-rotational employee on first posting to basic \$7,000 for \$35,000 salary for rotational employee with more than 11 years service abroad accompanied by two or more dependants. (Basic amounts adjusted by Post Index; average 25%).
- Adjust table annually to reflect change in public service salaries;
  - Eliminate FSD 57 and separate non-rotational sub-step in scale;
  - Proposed table varies from \$2,198 for single employee on first posting to \$10,520 for \$50,000 employee with more than 11 years abroad accompanied by two or more dependants.

POST DIFFERENTIAL ALLOWANCE

FSD 58

- A tax-free allowance payable in recognition of undesirable conditions existing at certain posts.
- Incentive allowance for hardship conditions varies by four levels of hardship and family size.

Unaccompanied

Level I	(675)	1200
Level II	(975)	1800
Level III	(1425)	2400
Level IV	(2100)	3600

Accompanied by 1 Dependant

Level I	(865)	1500
Level II	(1200)	2250
Level III	(1725)	3000
Level IV	(2625)	4500

Accompanied by 2 or more Dependants

Level I	(1050)	1800
Level II	(1425)	2700
Level III	(2100)	3600
Level IV	(3150)	5400

- Annual revision by % change in public service salaries;
- 50% bonus offer after 24 months at a hardship post;
- Up to 50% bonus for war condition.

1979 FSDs

1982 FSDs (CURRENT)

FOREIGN LANGUAGE ALLOWANCE

FSD 59

- A taxable allowance paid to encourage employees to achieve and retain proficiency in foreign languages which are required in the performance of duties at the post.

EMERGENCY EVACUATION AND LOSS

FSD 64

- Provides for the emergency evacuation of an employee and/or dependents owing to hostilities, natural disaster or other threatening circumstances.
- Provides for safeguarding an employee's material possessions during such absence and compensation for any loss occasioned by the events which led to evacuations.

DEATH ABROAD OF AN EMPLOYEE OR HIS DEPENDENT

FSD 66

- Provision for payment of certain expenses in excess of those which would have been incurred had death occurred at the employee's headquarters city.

CALCULATION OF ALLOWANCES

FSD 69

- Sets out general method of calculating allowances where no specific formula exists under another Directive.

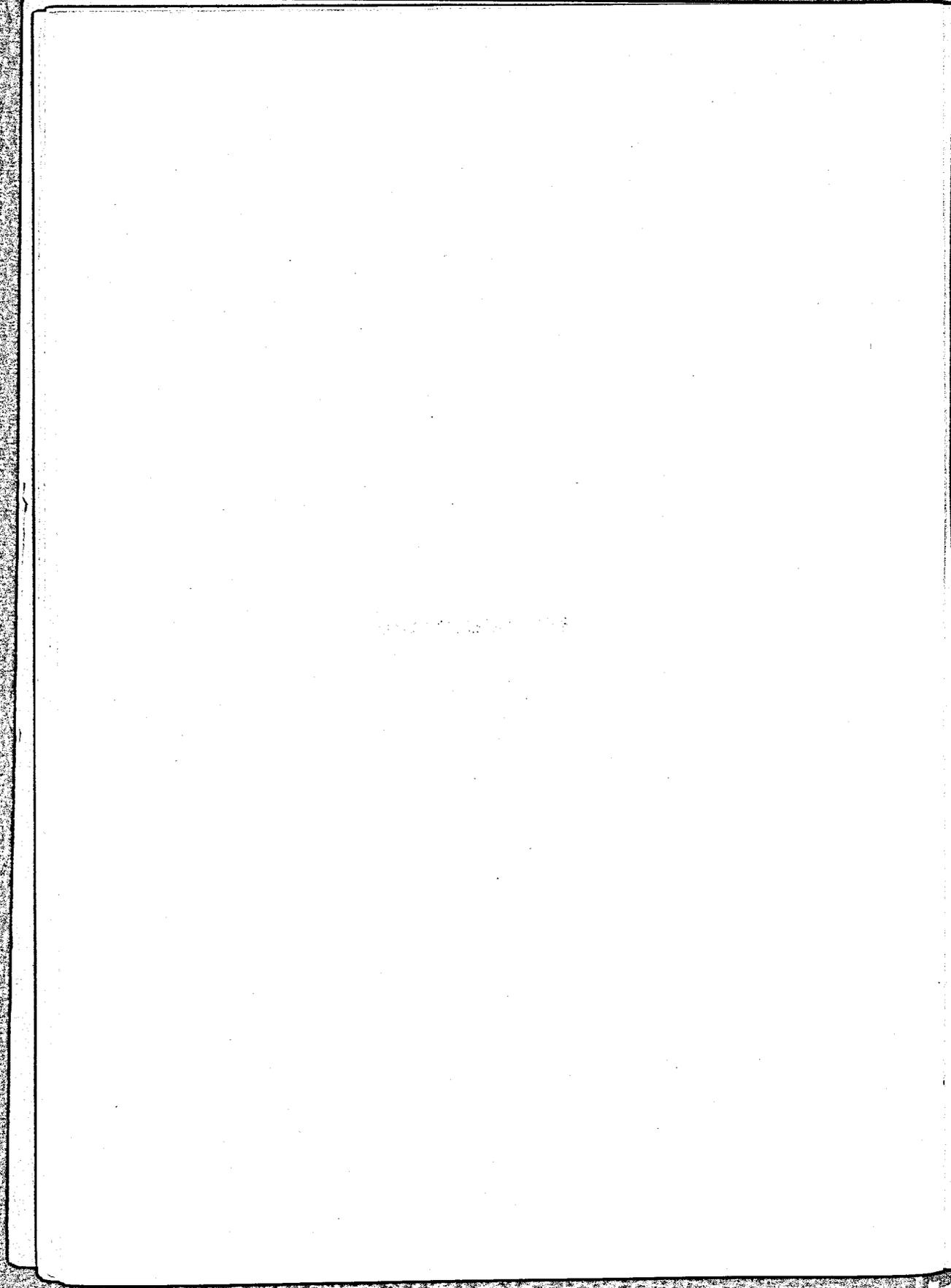
1979 FSDs

1982 FSDs (CURRENT)

REPORTING REQUIREMENTS

FSD 70

- Sets out the employee's requirement to report periodically to Treasury Board on the implementation of certain Directives.



APPENDIX B

WHO DOES WHAT AT HEADQUARTERS?

This is a ready reference to some of the Divisions and Sections responsible for the administration of the Foreign Service Directives, Personnel Policy and related areas.

<u>Area of Concern</u>	<u>Communicate With</u>
Accommodation	MRML
Allowances (Calculation and Payment)	APRE
Allowances (Policy)	APRA
Assignments, Officers	APOZ
Assignments, Support Staff	APOA
Canada-Savings Bonds (Payroll deductions)	APRE
Collective Agreements	APRS
Compassionate Travel	APRO
Conflicts of Interest	ACO
Discipline	APRS
Educational Allowances	APRO
Education Travel	APRO
Employee Assistance Program	APRN
Family Reunion Travel	APRO
Foreign Service Directives (Policy)	APRA
Foreign Service Leave/Option	APRE
Foreign Service Travel Assistance	APRO
Grievances	APRS
Hardship Post Committee	APRA
Health Care Expenses	APRO
Health Insurance	APRO
Leave and Attendance	APRE
Leave Without Pay	APRS
Loans, Issuance	APRA
Loans, Recovery	APRE
Mailing Privileges	MGIM
Meal Rates	APRK
Medical Expense Advances	APRO
Medical Travel	APRO

<u>Area of Concern</u>	<u>Communicate With</u>
Occupational Health and Safety	APRS
Official Hospitality	APRH
Official Languages	APL
Passports	MPO
Pay	APRE
Personnel Welfare Counselling	APRW
Post Index	APRA
Posting Arrangements	APOB
Pre-Posting Briefings	APOB
Relocation, Coordination and Claims	APRK
Removal of Effects	APRR
Retirement	APRN
School Holiday Maintenance	APRO
Security	ZSS
Special Leave	APRS
Superannuation	APRN
Travel Entitlements	APRT
Voting Abroad	APRV

**APPENDIX C**  
**FAMILY BUDGET ANALYSIS WORKSHEET**  
**Part I Assets and Liabilities**

Make a list of your assets and liabilities

**ASSETS**

- (1) Savings \_\_\_\_\_
- (2) Car \_\_\_\_\_
- (3) Furniture \_\_\_\_\_
- (4) Real Estate \_\_\_\_\_
- (5) Other \_\_\_\_\_
- TOTAL (1) to (5)** \_\_\_\_\_

**LIABILITIES**

**(6) Loans**

Type	Purpose	Expiry Date	Balance
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**(7) Charge Accounts**

_____	_____
_____	_____
_____	_____

**(8) Others**

_____	_____
_____	_____

**TOTAL (6) to (8)** \_\_\_\_\_

Part 2 - CANADA

State all amounts on a monthly basis

INCOME

- (1) Net salary of employee \_\_\_\_\_
- (2) Net salary of spouse \_\_\_\_\_
- (3) Other (specify) \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- (4) TOTAL NET MONTHLY INCOME .(1).(2).(3). \_\_\_\_\_ (4)

EXPENSES

- (5) Shelter
  - (a) Rent or Mortgage (including taxes) \_\_\_\_\_
  - (b) Maintenance and Repairs \_\_\_\_\_
  - (c) Insurance \_\_\_\_\_
  - (d) Heat \_\_\_\_\_
  - (e) Hydro \_\_\_\_\_
  - (f) Telephone/Cable TV \_\_\_\_\_
  - Total \_\_\_\_\_ (5)
- (6) Living Expenses
  - (a) Food \_\_\_\_\_
  - (b) Clothing \_\_\_\_\_
  - (c) Medical and Dental \_\_\_\_\_
  - (d) Life Insurance \_\_\_\_\_
  - (e) Entertainment/Recreation/Vacation \_\_\_\_\_
  - (f) Other (specify) \_\_\_\_\_
  - Total \_\_\_\_\_ (6)
- (7) Transportation
  - (a) Fuel \_\_\_\_\_
  - (b) Maintenance \_\_\_\_\_
  - (c) License/Insurance \_\_\_\_\_
  - (d) Public Transportation \_\_\_\_\_
  - Total \_\_\_\_\_ (7)
- (8) Fixed Monthly Payments
  - (a) Car \_\_\_\_\_
  - (b) Furniture, appliances, etc. \_\_\_\_\_
  - (c) Charge Cards (specify) \_\_\_\_\_
  - \_\_\_\_\_
  - Total \_\_\_\_\_ (8)
- (9) TOTAL NET MONTHLY COMMITMENTS \_\_\_\_\_ (9)
- BALANCE - Subtract (9) from (4) \_\_\_\_\_
- \_\_\_\_\_

PART 3 - AT THE POST

State all amounts on a monthly basis

**INCOME**

- (1) Net Salary \_\_\_\_\_
- (2) Salary Equalization (varies by post index) \_\_\_\_\_
- (3) FSP \_\_\_\_\_
- (4) PDA \_\_\_\_\_
- (5) Other (specify) \_\_\_\_\_
  
- (6) TOTAL NET MONTHLY INCOME (1) to (5) \_\_\_\_\_ (6)

**EXPENSES**

- (7) Accommodation
    - (a) Shelter Cost \_\_\_\_\_
    - (b) Telephone \_\_\_\_\_
    - (c) Other \_\_\_\_\_
  
    - Total \_\_\_\_\_ (7)
  
  - (8) Living Expenses
    - (a) Food \_\_\_\_\_
    - (b) Clothing \_\_\_\_\_
    - (c) Medical and Dental \_\_\_\_\_
    - (d) Life Insurance \_\_\_\_\_
    - (e) Entertainment/Recreation/Vacation \_\_\_\_\_
    - (f) Other (specify) \_\_\_\_\_
  
    - Total \_\_\_\_\_ (8)
  
  - (9) Transportation
    - (a) Fuel \_\_\_\_\_
    - (b) Maintenance \_\_\_\_\_
    - (c) License/Insurance \_\_\_\_\_
    - (d) Public Transportation \_\_\_\_\_
  
    - Total \_\_\_\_\_ (9)
  
  - (10) Fixed Monthly Payments
    - (a) Carry Over From Canada \_\_\_\_\_
  
    - (b) Posting Loan \_\_\_\_\_
    - (c) Car \_\_\_\_\_
    - (d) Charge Cards (specify) \_\_\_\_\_
  
    - Total \_\_\_\_\_ (10)
  
  - (11) TOTAL MONTHLY COMMITMENTS (7) to (10) \_\_\_\_\_ (11)
- BALANCE - Subtract (9) from (6) \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

CONSOLIDATED EDUCATION/FAMILY REUNION ENTITLEMENTS

Status/Location of Dependents	Educational Facilities at the Post	LEVEL OF EDUCATION					
		PRIMARY		SECONDARY		POST-SECONDARY	
		Entitlements Under					
		FSD 34	FSD 51	FSD 34	FSD 51	FSD 34	FSD 51
Student at Post	Compatible	A (34.03)	N/A	A (34.03)	N/A	N/A	N/A
Student in Canada	Not compatible	B (34.04(a) (i))	W	B (34.04(b))	X	D (34.06) (34.07)	Y Under Age 21 on 1/9
	Compatible	C (34.04(a) (ii))	N/A	B (34.04(b))	X		Z Age 21-23 on 1/9
Student Elsewhere	Not compatible	B (34.05(a))	W	B (34.05(a))	X	N/A	Y Under Age 21 on 1/9
	Compatible	C (34.05(b))	N/A	B (34.05(b))	N/A		Z Age 21-23 on 1/9
Child and Spouse Reside Together and Do Not Accompany Employee	CONSULT APRO: FSD 34 entitlements may not apply or Treasury Board Authority may be required. When FSD 34 applies, child's FSD 51 entitlement is as indicated above. Otherwise, child may travel per Code X when under age 19 on 1/9 or per Code Y when age 19-20 on 1/9. Spouses FSD 51 entitlement is Code X.						
Children Under Custody Agreements	CONSULT APRO: FSD 34 does not apply where child is in custody of non-employee parent. FSD 51.07 provides a travel entitlement (less employee share) in certain circumstances.						

APPENDIX D

CONSOLIDATED EDUCATION/FAMILY REUNION ENTITLEMENTS - CONTINUED

FSD 34 CODE

- A - Admissible Educational Expenses up to established Post Ceiling.
- B - Admissible Educational Expenses plus actual board, lodging and laundry expenses up to Established Canadian Ceiling.
- C - Admissible Educational Expenses up to those associated with the least costly school on the Post's roster of compatible Facilities.
- D - Shelter Assistance up to \$4.00 per day during the academic year.

FSD 51 CODE

- W - 3 return trips per 12-month period; transportation cost limited to economy airfare between school and post.
- X - 2 return trips per 12-month period; transportation cost limited to economy airfare between school and post.
- Y - 2 return trips per 12-month period; transportation cost limited to economy airfare between Headquarters and Post.
- Z - 1 return trip per 12-month period; transportation cost limited to economy airfare between Headquarters and Post.

APPENDIX D (Cont'd)



APPENDIX E

TRAVELLERS' FIRST AID/MEDICAL KIT

The following items can easily be compacted in a tote bag or carrying case and will cover most minor ailments:

- Thermometer
- Scissors
- Tweezers
- Sterile Gauze
- Adhesive Tape
- Band-aids
- Aspirin or Tylenol
- Ointment for Cuts, Burns and Abrasions
- Laxative
- Antacid Tablets
- Kaopectate or Lomatil
- Motion Sickness pills
- Cotton
- Mercurchrome or Iodine
- Calamine Lotion
- Insect Repellent
- Water Purification Tablets
- Salt Tablets
- Any prescriptions or remedies advised by your doctor

CHAPTER 10

THE HISTORY OF THE UNITED STATES

The history of the United States is a story of growth and change, from a small collection of colonies to a global superpower.

1776

July 4

1789

September 17

1791

September 17

1793

September 17

1794

September 17

1796

September 17

1797

September 17

1798

September 17

1799

September 17

1800

September 17

1801

September 17

1802

September 17

1803

September 17

1804

September 17

1805

September 17

1806

September 17

1807

September 17

**APPENDIX F**  
**IMPORTANT PERSONAL DATA**

**APPENDIX F (Cont'd)**

SUBJECT INDEX

ACCOMMODATION

- Crown 47, 120
- Disposal of 54-55, 86
- Fees to secure 71
- Househunting Trip to locate 48, 86
- Private 47-48, 116-117
- on Relocation 105-107, 111, 116
- on Return to Canada 146-147

ACCOMPANYING BAGGAGE 92-93, 107

ACCOUNTABLE ADVANCES 32-33, 91, 112, 159

ADMINISTRATIVE PROBLEMS 126-127

ADVERTISING 69

ALCOHOL 131-132

ALLOWANCES

- Calculation of 172
- Educational 75-78
- Foreign Language 23, 172
- Foreign Service Premium 20, 170-171
- Post Differential 22, 171
- Tax-Free 20, 152

ALTERATIONS 69-70

APPRAISALS 64, 70-71, 86

ASSEMBLING/DISASSEMBLING EXPENSE 70

ATTITUDE 128-129

AUTOMOBILES

- Crown-Held 49-50
- Disposal of 89
- Inspection of 73, 89
- Modifications to 73
- Operating Cost 153
- Shipment of 48-49, 67-68, 91, 161
- Storage of 60, 87

BANKING ARRANGEMENTS 100-101, 112

BILL OF LADING 60, 150

BLIND TRUST 99

CARRIERS 107, 150

CERTIFICATES OF GOOD WORKING CONDITION 70

CHANGE OF ADDRESS 87-89, 91, 100, 104

CHILDREN

- Adjustment problems of 130
- Custody of 102
- Education of 75-80

CLAIMS (See LOSS AND DAMAGE CLAIMS)

CLEANING EXPENSES

- Laundry and Dry Cleaning 106
- after Removal 70
- prior to Storage 70, 92

CODE OF CONDUCT 99-100

COMMUNITY RESPONSIBILITIES 87-89, 104

COMMUTING ASSISTANCE 50, 164

COMPARABILITY 4, 150

COMPASSIONATE TRAVEL 142, 170

COMPATIBILITY 75-76

CONFLICT OF INTEREST 99-100

COURT-ORDERED STIPULATIONS 102

CURRENCY CONVERSION 93, 106-107

CULTURE SHOCK 129-130, 150

DEATH 143-144, 172

DENTAL EXAMINATIONS 13, 159

DOCUMENTS 89-90, 92, 103

DRIVER'S LICENCE 35, 71

EDUCATION

- in Canada 78, 146, 165
- Compatibility of Facilities 75-76
- Level of 76
- at the Post 76, 78, 164
- in a Third Location 78, 165
- Travel 79, 165

EDUCATIONAL ALLOWANCES

- Ceilings for 75-76
- Proposal for 77
- on Relocation 78

ELECTRICAL APPLIANCES AND SYSTEMS

- Connection/Disconnection 70, 96, 115
- Conversion of 70, 92

EMERGENCIES 142-144

EMPLOYER ASSISTANCE PROGRAM 39, 131

ESTIMATES (See APPRAISALS)

EVACUATION 143, 172

EXPENSE CLAIMS (See ACCOUNTABLE  
ADVANCES)

FAMILY REUNION TRAVEL 79, 141-142, 169

FAMILY SEPARATION EXPENSES 55-56

FILM FOR PROCESSING 36

FINANCIAL OBLIGATIONS 28-29, 102, 131

FOREIGN EXCHANGE (See CURRENCY  
CONVERSION)

FOREIGN LANGUAGE ALLOWANCE 23, 172

FOREIGN SERVICE COMMUNITY ASSOCIATION  
104, 146

FOREIGN SERVICE DIRECTIVES

- What are They? 4
- Why Do We Have Them? 4

FOREIGN SERVICE LEAVE 26, 138-139,  
167-168

FOREIGN SERVICE PREMIUM 16, 20, 170-171

FOREIGN SERVICE TRAVEL ASSISTANCE  
140-142, 168-169

FOREIGN TRAVEL AND REMOVAL SERVICE 51

GRATUITIES

- to Movers 71
- during Relocation 105-106

GREETING CARDS 37

GUARDIANSHIP 102

HEALTH CARE EXPENSES (See MEDICAL AND  
RELATED EXPENSES)

HEALTH CARE TRAVEL 134-135, 167

HEALTH RISKS 135-137

HOLIDAYS 26

HOUSEHOLD EFFECTS

- Appraisal of 64
- Connection/Disconnection of 71
- Delivery of 114
- Inventories of 60-66, 86
- Insurance of 66
- Packing Up 94-96
- Prohibited 65
- Restricted from Shipment 65-66
- Shipment of 58-59
- Storage of 60
- Survey 56, 58, 86

IMMUNIZATIONS 13

IMPORTANT PAPERS (See DOCUMENTS)

INCENTIVE-INDUCEMENT 4, 151

INCOME TAX

- On Disposal of Accommodation 55, 100
- Filing While Abroad 100
- P.O. Box 489 35

INSTALLATION EXPENSES 71

INSURANCE

- of Automobiles 67, 103
- Cancellation of 69, 72
- Cost of extra 71
- of Household Effects 66, 86, 103, 113, 120
- Items excluded from 64-65

INTERESTS ON LOANS 27, 150

INTERNATIONAL CERTIFICATE OF  
VACCINATIONS 13-14

INVENTORIES 60-66, 86

INVESTMENTS 101

LEASES (See ACCOMMODATION)

LEAVE

- Entitlements 26, 138-143
- Holiday 26
- Foreign Service 26, 138-139
- Post Attributable Injury and Illness 26, 168
- Special 26, 168

LIVING EXPENSES (See RELOCATION)

LOANS (See POSTING LOANS)

LOSS AND DAMAGE CLAIMS

- against the Crown 123, 161
- against the Crown's Underwriters 124-125, 161
- Estimates for support of 71

- Notice of Intent to File 114-115
- against Private Insurers 114
- for Specified Items 72

MACONALD HOUSE 36

MAIL (See PERSONAL MAILING PRIVILEGES)

MAINTENANCE (See COURT-ORDERED  
STIPULATIONS)

MEAL RATES 105

MEDICAL EXAMINATIONS

- Pre-posting 13-14, 159
- Preventive 133, 166

MEDICAL AND RELATED EXPENSES

- Coverage 82
- Excessive Health Care 134
- Health Care Travel 134-135, 167
- Medical Expense Advance 134
- Post Attributable Illness or Injury 133-134
- Preventive Medical Services Expenses 133, 166

MONEY PROBLEMS 131

MOVING EXPENSES (See REMOVAL and  
SPECIFIED INCIDENTAL EXPENSES)

NATIONAL JOINT COUNCIL 4, 151

NORMAL HEALTH CARE EXPENSES 133, 166

NOTICE OF ASSIGNMENT 11

OFFICIAL HOSPITALITY 82

OFFICIAL LANGUAGES 81

PACKING AND MOVING DATES 58

PARKING EXPENSES 50, 164

PASSPORTS 81, 93

PAY 16-19

PERSONAL EFFECTS (See HOUSEHOLD EFFECTS)

PERSONAL MAILING PRIVILEGES

- Change of Address 87-89
- Correspondence 34
- Film for Processing 36
- Greeting Cards 37
- MacDonald House 36
- Parcels 37
- P.O. Box 489 35, 100
- P.O. Box 500 35, 100
- Privileged Posts 35-37
- Specified Health Aids 35
- Voice Tapes 36

PERSONAL WELFARE COUNSELLING 39, 143

PETS 72, 87, 96

POST

- Administrative Officer 126-127
- Attributable Illness and Injury 26, 168
- Code Group 35, 151
- Differential Allowance 16, 22, 171
- Educational Facilities Report 11, 151
- Index 24-25
- Management 126
- Report 11, 151

POSTING-BRIEFING CENTRE 12, 43, 145-146

POSTING CONFIRMATION 32, 152

POSTING CYCLE 7

POSTING LOANS

- Calculation of Interest 27
- How to Apply 28, 31
- How much to Borrow? 28-29
- Maximum amount 27
- Repayment 28,30

POWER OF ATTORNEY 89, 101

PRE-POSTING ADMINISTRATIVE BRIEFING 15

PREVENTIVE MEDICAL SERVICES EXPENSES 133, 166

REAL ESTATE EXPENSES 55, 162

RE-ENTERING THE CANADIAN WORKFORCE 146

RELOCATION 51, 105-108, 160-161

REMOVAL

- Methods of 59
- of Personal Effects 56-69, 161
- of Restricted Items 65-66
- Selecting a Company 56-57, 85
- Weight Limitations 161

REPAIRS (See also CLAIMS)

- Specified Expenses 72

REPLACEMENT (See also CLAIMS)

- Specified Expenses 72

REQUEST TO DEPOSIT CHEQUES 18

RETIREMENT 145, 162

RETURN TO CANADA 145-147

ROYAL COMMISSION ON CONDITIONS OF FOREIGN SERVICE 25, 152

SAFETY DEPOSIT BOX 89, 101

SALARY EQUALIZATION 24-25, 170

SCHOOL HOLIDAY MAINTENANCE 79-80, 166

SCHOOLS (See EDUCATION)

SECURITY 81

SECURITY DEPOSIT ADVANCE 117, 163

SERVANTS 130

SHELTER (See ACCOMMODATION)

SHELTER COST

- Deficiency Adjustment 121
- Determination of 44-46
- Payment of 46, 120-121
- Waiver of 55

SHIPMENT OF EFFECTS (See REMOVAL)

SPECIAL HEALTH CARE EXPENSES 133, 166

SPECIAL LEAVE 26, 168

SPECIAL PURCHASES 103

SPECIFIED HEALTH AIDS 35

SPECIFIED INCIDENTAL EXPENSES 69-73,  
161

STORAGE (See also HOUSEHOLD EFFECTS)

- Specified Expenses 72
- Safe Storage Benefit 122, 163

SUPERANNUATION 145

TAXATION (See INCOME TAX)

TAXI FARES 73, 106

TELEPHONE/TELEGRAM EXPENSES 73

TRANSPORTATION (See also RELOCATION and  
TRAVEL ENTITLEMENTS)

- Commuting Assistance 50
- Crown-held Automobiles 49-50, 164
- Related Expenses 50
- for School Children 50
- Shipment of Automobiles 48-49
- Specified Local Expenses 73
- Tickets 93
- Vehicle Operating Costs 50, 153

TRAVEL ASSISTANCE 140-142, 168-169

TRAVEL ENTITLEMENTS 51-53, 91, 160

TREASURY BOARD 4, 152

UTILITIES (See SHELTER COST)

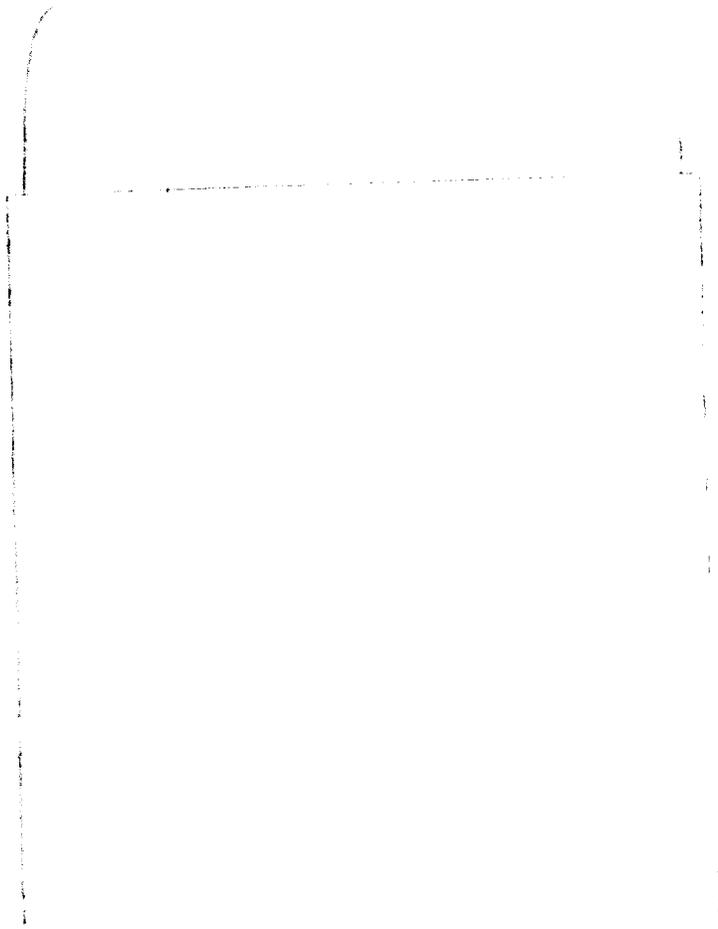
VEHICLE OPERATING COST 153

VEHICLE REGISTRATION 50

VISAS 93, 148

VOICE TAPES 36

WILLS 89, 101-102



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