



福建計劃簡易表格
Fujian Scheme Simplified Form

此欄供本署填寫 For office use																							
檔案編號 Casefile Reference																							
申請日期 Date of Application	<table border="1"> <tr> <td></td><td></td><td></td><td></td><td>年</td><td></td><td></td><td>月</td><td></td><td></td><td>日</td> </tr> <tr> <td colspan="5">Year</td> <td colspan="3">Month</td> <td colspan="3">Day</td> </tr> </table>					年			月			日	Year					Month			Day		
				年			月			日													
Year					Month			Day															

此簡易表格的目的是為便利福建計劃受惠人／受委人提出申請轉領福建計劃下的其他津貼。受惠人／受委人填妥表格後，請將表格寄回／親身交回／傳真或電郵至以下辦事處：

This simplified form serves to facilitate the Fujian (FJ) Scheme recipients/appointees to apply for conversion to receive other allowance under the FJ Scheme. After completing the form, please return it to the office below by post/by fax/by email or in person:

社會保障辦事處（廣東計劃及福建計劃）

Social Security Field Unit (Guangdong Scheme and Fujian Scheme)

地址：香港上水龍琛路 39 號上水廣場 21 樓 2110-2111 室

Address: Unit 2110-2111, 21/F, Landmark North, 39 Lung Sum Avenue, Sheung Shui, Hong Kong

電話 Tel.: 852-3105 3266 傳真 Fax: 852-3106 4144 電郵 Email: gdsfjsfuenq@swd.gov.hk

社會福利署接到申請後，會透過預約邀請受惠人／受委人到社會保障辦事處（廣東計劃及福建計劃）會見及完成申請手續。申請轉領長者生活津貼的受惠人或受委人須攜帶其及受惠人的配偶／同居人士（如適用）的身份證明文件正本及有關受惠人及其配偶／同居人士（如適用）的入息及資產證明，以供核實。

Upon receipt of an application, the Social Welfare Department will **arrange by appointment** an interview with the recipient/appointee at the Social Security Field Unit (Guangdong Scheme and Fujian Scheme). Recipient/Appointee applying for conversion to receive Old Age Living Allowance is required to bring along original copies of his/her identity document and that of his/her/the recipient's spouse/cohabiting partner (if applicable) and relevant documents pertaining to the income and assets held by the recipient and his/her spouse/cohabiting partner (if applicable) for verification.

注意：填寫前，請先詳閱「福建計劃受惠人／受委人須知」。請用黑色或藍色原子筆，以正楷填寫。如書寫錯誤，請用筆劃線刪改，並在旁簽署作實，切勿使用塗改液。

Note: Please read carefully the "Notice to Fujian Scheme Recipients/Appointees" and complete all items in this form in block letters with a blue or black pen. Please cross out any incorrect entries and sign against the amendment. Do not use correction fluid.

填寫本表格的目的是為（請選擇下列其中一項）：

The purpose of completing this form (please select one below):

轉換至福建計劃下的長者生活津貼 Switching to Old Age Living Allowance under the FJ Scheme

轉換至福建計劃下的高齡津貼 Switching to Old Age Allowance under the FJ Scheme

第一部分 申請人的個人資料 Part 1 Personal data of Applicant	
姓名(中文) Name in Chinese _____	姓名(英文) Name in English _____
香港身份證號碼 Hong Kong Identity Card number _____	性別 Sex <input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female
婚姻狀況 Marital status	出生日期 Date of birth _____
<input type="checkbox"/> 未婚 Never Married <input type="checkbox"/> #已婚 #Married <input type="checkbox"/> #同居(註) #Cohabiting(Note) <input type="checkbox"/> 分居 Separated <input type="checkbox"/> 離婚 Divorced <input type="checkbox"/> 喪偶 Widowed	
<p><i>(#婚姻狀況為「已婚」或「同居」的申請人請填寫第二部分。 #For an applicant whose marital status is "Married" or "Cohabiting", please fill in Part 2.)</i></p> <p>註：只適用於符合以下條件的申請個案：(i) 申請人與同居人士同居於同一處所；(ii) 申請人與同居人士共同分享經濟來源；和 (iii) 申請人同意向社會福利署提供其同居人士的個人資料和經濟狀況，姑勿論其同居人士有否正領取長者生活津貼／其他津貼。有關申請將以「夫婦經濟來源限額」進行經濟審查，以評核申請人領取長者生活津貼的資格。</p> <p>Note: Only applicable to cases where the applicant (i) is currently living with a cohabiting partner in the same household; (ii) is living on shared resources with the cohabiting partner; and (iii) agrees to provide the personal and financial information of the cohabiting partner to the Social Welfare Department, regardless of whether the applicant's cohabiting partner is/is not currently receiving the Old Age Living Allowance/other allowance. Such application will be subject to the means test assessment based on the "Financial Resource Limits for Married Couples".</p>	
現時福建住址 Present residential address in FJ _____	郵編 Postal code _____
通訊地址 Correspondence address (如與住址不同，始須填寫) (Only if different from residential address)	_____
電話號碼 (*香港／福建) Telephone number (*HK/FJ) _____	電子郵箱 (如有) Email address (if any) _____

*申請人／受委人*簽名／指模

*Signature/Thumbprint of *applicant/appointee

△見證人*簽名／指模

*Signature/Thumbprint of △witness

請在適當方格內填上「√」號。 Tick as appropriate.

* 請刪去不適用字句。 Delete whichever is inappropriate.

△ 如有見證人則須簽署及填寫。 Applicable if there is a witness.

日期

Date _____

第二部分 申請人配偶／申請人同居人士的個人資料（只適用於長者生活津貼申請人而其婚姻狀況為「已婚」或「同居」）
Part 2 Personal data of the applicant's spouse/cohabiting partner (only applicable to an Old Age Living Allowance applicant whose marital status is "Married" or "Cohabiting")

姓名(中文) _____ 姓名(英文) _____
 Name in Chinese _____ Name in English _____

身份證明文件及號碼 _____ 性別 _____ 出生日期 _____
 Identity document and number _____ Sex 男 Male 女 Female Date of birth _____

請注意：在提交此表格時，請一併交回申請人配偶／同居人士的身份證明文件副本。
Please note: Please submit this form together with photocopy of identity document of the applicant's spouse/cohabiting partner.

住址 _____ 郵編 Postal code _____
 Residential address _____
 (如與申請人住址不同，始須填寫)
 (Only if different from applicant's residential address)

第三部分 受委人的個人資料（只適用於未能親自提出申請的人士）
Part 3 Appointee's personal data (only applicable to an applicant who is unable to make application by himself/herself)

姓名(中文) _____ 姓名(英文) _____
 Name in Chinese _____ Name in English _____

第四部分 申請人及其配偶／同居人士（只適用於長者生活津貼申請人而其婚姻狀況為「已婚」或「同居」）的人息及資產
Part 4 Income and asset value of the applicant and his/her spouse/cohabiting partner (only applicable to an Old Age Living Allowance applicant whose marital status is "Married" or "Cohabiting")

甲. 每月入息（以*港幣／人民幣計算）
 A. Income per month (in *Hong Kong dollars/Renminbi)

		申請人 Applicant		*配偶／同居人士 *Spouse/Cohabiting Partner	
1. 工資、手工業或生意上的入息等 Wages from employment, income from handiwork, business, etc.	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	
2. 退休金／長俸 Retirement benefits/pensions	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	
3. 收租所得的淨收益 Net income on rentals collected	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	
4. 從年金計劃所得的固定年金 Payout from the annuity scheme(s)	a) 「香港年金計劃」 HKMC Annuity Plan	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____
	b) 其他年金計劃 Other Annuity Scheme(s)	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____
每月總入息（1至4項） Monthly total income (Items 1 to 4)		合計 Total \$ _____		合計 Total \$ _____	

*申請人／受委人*簽名／指模 _____ 日期 _____
 *Signature/Thumbprint of *applicant/appointee _____ Date _____
 ^見證人*簽名／指模 _____
 *Signature/Thumbprint of ^witness _____

□ 請在適當方格內填上「√」號。 Tick as appropriate. * 請刪去不適用字句。 Delete whichever is inappropriate.
 △ 如有見證人則須簽署及填寫。 Applicable if there is a witness.

乙. 資產（包括在香港、澳門、內地或海外所擁有的資產）（以港幣計算）

B. Assets (including those in Hong Kong, Macao, the Mainland or overseas) (in Hong Kong dollars)

	申請人 Applicant		*配偶／同居人士 *Spouse/Cohabiting Partner	
	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____
1. 土地／非自住物業 Land/non-owner-occupied property	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____
2. 現金 Cash in hand	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____
3. 銀行儲蓄 Bank savings	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____
4. 股票及股份的投資(包括債券、基金及累算退休權益) Investments in stocks and shares (including bonds, trust fund and accrued retirement benefits)	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____
5. 金條及金幣等 Gold bars and gold coins, etc.	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____
6. 商業／作投資用途的車輛(例如的士及公共小巴)及其營業牌照 Vehicle for commercial use/investment (e.g. taxi and public light bus) and its business licence	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____	<input type="checkbox"/> 沒有 No	<input type="checkbox"/> 有 Yes \$ _____
總值 (1至6項) Total value (Items 1 to 6)		合計 Total \$ _____		合計 Total \$ _____

第五部分 其他資料（隨意提供）
Part 5 Other information (optional)

請註明
Please specify _____

*申請人／受委人*簽名／指模
*Signature/Thumbprint of *applicant/appointee _____

△見證人*簽名／指模
*Signature/Thumbprint of △witness _____

日期
Date _____

□ 請在適當方格內填上「√」號。 Tick as appropriate. * 請刪去不適用字句。 Delete whichever is inappropriate.
△ 如有見證人則須簽署及填寫。 Applicable if there is a witness.

第六部分**聲明及保證****Part 6****Declaration and undertaking**

— 本人（即下方簽署人）現聲明據本人所知，本表以上所列各項資料是正確無訛。

I, the undersigned, DECLARE that to the best of my knowledge and belief, the information in the above items is true.

— 如以上表內所列的資料有任何改變，或*本人／申請人遷離福建、在一個付款年度內在福建居住少於 60 天、遭監禁或合法羈留超過 29 天，本人將從速向社會福利署或其代理機構申報。

I undertake to report immediately to the Social Welfare Department or its agent any changes in the particulars contained herein. I further undertake to report immediately to the Social Welfare Department or its agent *my/the applicant's cessation to live in Fujian, residence in Fujian for less than 60 days in a payment year, imprisonment or detention in legal custody for more than 29 days.

— 本人已經通知*本人／申請人的家庭成員及本表格所提及的其他有關人士並獲得他們同意將他們的個人資料提供予社會福利署作本申請及相關的追收債項（如日後有需要）用途。

I have informed and obtained the consents of the other members of *my/the applicant's household and other relevant persons mentioned in this form to provide their personal data to the Social Welfare Department for the purpose of this application and the relevant debt recovery if later the circumstances warrant it.

— 本人同意社會福利署及其代理機構就*本人／申請人領取公共福利金一事而進行有關的調查，包括向入境事務處、各政府部門、銀行及其他團體、人士索取*本人／申請人／和配偶或同居人士（只適用於長者生活津貼申請人而其婚姻狀況為「已婚」或「同居」）的個人資料及記錄（例如*本人／申請人的出入境電腦資料）用來進行資料核對程序。本人亦同意該等政府部門、銀行及其他團體、人士將所需資料及記錄提供予社會福利署及其代理機構。

I consent to any investigations into the circumstances relating to *my/the applicant's receipt of Social Security Allowance being carried out by the Social Welfare Department and its agent, including but not limited to asking the Immigration Department, other government departments, banks and other parties to match *my/the applicant's personal data relating to *my/the applicant's receipt of Social Security Allowance with *my/the applicant's personal data held by such other departments or such other parties (such as *my/the applicant's travel records held on the computer) and those of *my/the applicant's spouse or cohabiting partner (only applicable to an Old Age Living Allowance applicant whose marital status is "Married" or "Cohabiting"). I also consent to such government departments, banks and parties providing the requested data and records to the Social Welfare Department and its agent.

— （只適用於長者生活津貼申請人）在寬限期過後，如*本人／申請人／和配偶或同居人士（只適用於婚姻狀況為「已婚」或「同居」的申請人）的每月總入息或資產總值超過社會福利署所定的限額，本人必須向社會福利署或其代理機構申報（以書面通知為準）。本人明白如不申報，將有被檢控的可能。

(For Old Age Living Allowance applicants only) I undertake to notify the Social Welfare Department or its agent (in writing) if, after the grace period, the monthly income or assets of *myself/the applicant/and spouse or cohabiting partner (only applicable to an applicant whose marital status is "Married" or "Cohabiting") exceed the limits set by the Social Welfare Department. I understand that if I fail to notify the Department, I shall render myself liable to prosecution.

— 本人已閱讀「福建計劃受惠人／受委人須知」及「收集個人資料聲明」，並明白其內容。

I have read the "Notice to Fujian Scheme Recipients/Appointees" and the "Personal Information Collection Statement" therein and understand the content.

— 本人明白社會福利署有權從*本人／申請人每月可得的津貼金中扣除經社會福利署核實的多領款項。

I understand that the Social Welfare Department has the right to deduct from *my/the applicant's monthly entitlements any amount certified by the Social Welfare Department as overpayment.

— 本人同意社會福利署從*本人／申請人／代理人為*本人／申請人的用途和利益而持有所指定領取公共福利金的銀行帳戶取回任何多領款項。本人亦同意所指定領取公共福利金的銀行，不時從*本人／申請人／代理人上述的銀行帳戶，扣除經社會福利署核實的多領款項。

I agree to the Social Welfare Department to recover any overpayment received for *me/the applicant directly from *my/the applicant's/the agent's bank designated for receiving Social Security Allowance payment held for *my/the applicant's use and benefit. I also agree to that designated bank for receiving Social Security Allowance payment to debit *my/the applicant's/the agent's bank account from time to time with any amount certified by the Social Welfare Department as overpayment.

— 本人明白如本人蓄意或存心提供不正確資料或隱瞞任何事項，或錯誤引導社會福利署或其代理機構，以圖獲得現金援助，將有被檢控的可能。

I understand that if I knowingly or willfully make any false statement or withhold any information, or otherwise mislead the Social Welfare Department or its agent for the purpose of obtaining payments, it will render me liable to prosecution.

— 以上聲明，本人已詳細閱讀，本人亦完全明白。

The above statement has been read by me and well understood by me.

*申請人／受委人*簽名／指模

*Signature/Thumbprint of *applicant/appointee

△見證人*簽名／指模

*Signature/Thumbprint of △witness

△見證人姓名

Name of △witness

日期

Date



此欄供本署填寫

For office use

□ 請在適當方格內填上「√」號。 Tick as appropriate. * 請刪去不適用字句。 Delete whichever is inappropriate.
△ 如有見證人則須簽署及填寫。 Applicable if there is a witness.

福建計劃簡易表格

受惠人／受委人須知

每月津貼金額（港元）

- 現時福建計劃下的長者生活津貼及高齡津貼的每月金額分別為\$4,195 及\$1,620，有關金額會按每年調整機制調整。

長者生活津貼的入息及資產限額（港元）

- 福建計劃下的長者生活津貼的入息及資產限額（由 2024 年 2 月 1 日起生效）如下：

		單身人士 ⁽¹⁾	夫婦 ⁽²⁾
長者生活津貼	每月總入息	\$10,710	\$16,330
	資產總值	\$401,000	\$608,000

- 「入息」包括工資、手工業或生意上的入息等（包括薪金、工資、每月收到的佣金或獎金，以及從自僱所得的每月入息）、退休金／長俸、從收租所得的淨收益，以及從年金計劃所得的固定年金⁽³⁾。家庭成員或親友的金錢援助，以及在安老按揭計劃（只適用於以自住物業作抵押的安老按揭計劃）及保單逆按揭計劃下每月所獲得的款項則不包括在內，但款項中未動用而累積為儲蓄／現金的部份，會被視作「資產」計算。
- 「資產」⁽⁴⁾包括土地和非自住物業⁽⁵⁾、現金、銀行儲蓄、股票及股份的投資（包括債券、基金、獨資、合夥經營的公司／商號或有限公司的權益及累算退休權益⁽⁶⁾）、商業／作投資用途的車輛（例如的士及公共小巴）及其營業牌照，以及金條及金幣等。自住物業⁽⁵⁾、將來自用的骨灰龕及保險計劃的現金價值則不包括在內。
 - 「單身人士入息及資產限額」適用於婚姻狀況為「未婚」、「分居」、「離婚」或「喪偶」的申請人。申請人只須填報其個人資料及經濟狀況。
 - 「夫婦入息及資產限額」適用於婚姻狀況為「已婚」或「同居*」的申請人。申請人必須填報其配偶／同居人士的個人資料及經濟狀況。
（*只適用於符合以下條件的申請個案：(i) 申請人與同居人士同居於同一處所；(ii) 申請人與同居人士共同分享經濟來源；和(iii) 申請人同意向社會福利署（社署）提供其同居人士的個人資料和經濟狀況，姑勿論其同居人士有否正領取長者生活津貼／其他津貼。有關申請將以「夫婦經濟來源限額」進行經濟審查，以評核申請人領取長者生活津貼的資格。）
 - 年金計劃包括由香港年金有限公司推出的「香港年金計劃」及市場上的其他年金計劃。從年金計劃所得的固定年金（通常以每月形式發放）會納入每月入息計算。如固定年金以每季／半年／每年發放一次，則會按月平均攤分，計算為每月入息，但投保保費金額則獲豁免計算資產，不過退出年金計劃而獲發還的退保金額（如有）須納入資產計算。
 - 包括在香港、澳門、內地或海外由申請人及／或其配偶／同居人士（如適用）分別或共同擁有或與他人共同擁有的資產。
 - 物業包括在福建及福建以外地方的土地及任何用途的房產物業、車位等。只有一項作為福建主要居所的住宅物業及自用車位會視作「自住物業」，可獲豁免計算資產；其他由申請人及／或其配偶／同居人士（如適用）分別或共同擁有或與他人共同擁有的房產物業或車位，均視作「非自住物業」，須納入資產計算。
 - 累算退休權益是指目前保留在強制性公積金（下稱“強積金”）計劃或其他退休金計劃內的退休權益。該等權益的總額估計，可參考強積金計劃受託人或其他退休金計劃受託人／管理人最近期發出的權益報表或其他有效證明文件所提供的資料。如申請人的配偶／同居人士（如適用）未滿65歲，則其配偶／同居人士的累算退休權益（只適用於由強制性供款及可扣稅自願性供款產生的累算退休權益）可獲豁免計算資產，而每月作出的強制性供款，亦可獲豁免計算入息；但已被提取的累算退休權益須計算為資產。

開始獲發津貼的日期

3. 收到「福建計劃簡易表格」後，社署會作出適當跟進及核實受惠人的資格。合資格的受惠人會由社署收到申請的日期或符合資格轉領福建計劃下的長者生活津貼／高齡津貼的日期（以較後的日期為準）起開始獲發長者生活津貼／高齡津貼，當中須扣除同時期已向受惠人發放的津貼。受惠人在轉領長者生活津貼／高齡津貼後，將不能同時領取公共福利金計劃下的其他津貼或綜合社會保障援助。

領取津貼後的寬限期

4. 在一般情況下，在獲發長者生活津貼後，受惠人會享有由符合資格日期起計的 12 個月的寬限期^(註)。在寬限期內，即使受惠人及／或其配偶／同居人士（如適用）的經濟狀況有任何改變以致入息及／或資產超出限額，受惠人在該段期間所獲發的津貼也不會受到影響。在寬限期過後，如受惠人及／或其配偶／同居人士（如適用）的入息及／或資產超出限額，必須立即通知社署或其代理機構，以便安排停止發放津貼。

註：寬限期由符合資格領取長者生活津貼（包括在香港、廣東或福建領取的長者生活津貼）的日期起計的 12 個月。如受惠人轉換領取津貼的地方至香港、廣東或福建，他／她不會重新獲得 12 個月的寬限期，他／她只會享有餘下的寬限期（如有）。

個案覆檢

5. 社署會透過代理機構的協助，對福建計劃下的長者生活津貼／高齡津貼個案每年進行一次郵遞覆核或以家訪形式進行一次抽樣調查，以確定受惠人仍符合相關申領資格。受惠人／受委人須與社署代理機構的職員充分合作。

領取津貼期間離開福建的寬限

6. 受惠人在領取津貼期間，只需於付款年度內在福建居住滿 60 天，便合資格領取全年津貼；在該年度相應的離開福建總日數不得超過 305 天（於閏年則為 306 天）。否則受惠人只會獲發他／她在福建居住期間的津貼。

申報狀況的轉變

7. 如受惠人的狀況有任何轉變，而這些轉變又和受惠人申請時所提供的資料有關，受惠人／受委人須盡快向社署的代理機構或社會保障辦事處（廣東計劃及福建計劃）申報。

醫療費用的豁免

8. 福建計劃下的 75 歲或以上長者生活津貼受惠人可在香港的公立診所或醫院（包括急症室）獲得豁免醫療費用。當受惠人登記求診或辦理入院手續時，可向診所或醫院職員表示他們是長者生活津貼受惠人，以及出示他們申請長者生活津貼時使用的身份證明文件（例如：香港身份證、香港出生證明書、豁免登記證明書、香港入境許可證、單程證、護照或其他國家出生證明書等），診所或醫院職員便會透過聯機查詢系統確認其資格，安排醫療費用豁免。
9. 如受惠人日後取消長者生活津貼的申請或不再符合資格領取長者生活津貼，有關豁免醫療費用資格亦會同時取消。

重要事項

10. 受惠人或其受委人必須向社署或其代理機構提供真確及完整的資料，任何人如明知或故意作虛假陳述或隱瞞任何資料，以騙取津貼，即屬刑事罪行。此外，已申報的資料如有所改變並可能導致津貼金額減少或受惠人不符合資格領取津貼，而受惠人或其受委人蓄意不向社署或其代理機構申報有關資料的變更，亦屬違法。受惠人或其受委人可被檢控，任何多領的津貼均須退還社署。

查詢

11. 如有查詢，請於辦公時間內（星期一至五，上午 8 時 45 分至下午 1 時及下午 2 時至 6 時，星期六、日及公眾假期休息）致電廣東計劃及福建計劃查詢電話 852-3105 3266。

Fujian Scheme Simplified Form

Notice to Recipients/Appointees

Monthly allowances (in Hong Kong dollars)

- The current monthly rates of Old Age Living Allowance (OALA) and Old Age Allowance (OAA) under the FJ Scheme are \$4,195 and \$1,620 respectively. The amounts will be adjusted according to the annual revision mechanism.

Income and asset limits for OALA (in Hong Kong dollars)

- The income and asset limits (effective from 1 February 2024) for OALA under the FJ Scheme are listed as follows:

		Single person ⁽¹⁾	Married couple ⁽²⁾
OALA	Total income per month	\$10,710	\$16,330
	Total asset value	\$401,000	\$608,000

- “Income” includes wages from employment, income from handiwork, business, etc. (including salaries, wages, monthly commissions or bonuses received, and monthly income from self-employment); retirement benefits/pensions; net income on rentals collected; and payout from the annuity scheme(s)⁽³⁾. Contributions from family members, relatives or friends, and monthly payments received under the Reverse Mortgage Programme (RMP) (only applicable to the RMP where the property as collateral is an owner-occupied property) and the Policy Reverse Mortgage Programme are excluded, but any unspent and accumulated amount of savings/cash in hand generated will be treated as “assets”.
- “Assets”⁽⁴⁾ include land and non-owner-occupied properties⁽⁵⁾; cash in hand; bank savings; investments in stocks and shares (including bonds, trust fund, interest in any business of sole proprietorship, partnership or firms/limited companies and accrued retirement benefits⁽⁶⁾); vehicle for commercial use/investment (e.g. taxi and public light bus) and its business licence; and gold bars and gold coins, etc. Owner-occupied property⁽⁵⁾, columbarium niche for self-use in future, and the cash value of insurance schemes are excluded.
 - “Income and Asset Limits for Single Person” are applicable to an applicant whose marital status is “Never Married”, “Separated”, “Divorced” or “Widowed”. The applicant is only required to provide his/her personal particulars and information on his/her own income and assets.
 - “Income and Asset Limits for Married Couples” are applicable to an applicant whose marital status is “Married” or “Cohabiting*”. The applicant is required to provide his/her spouse’s/cohabiting partner’s personal particulars and information on income and assets.
 (*Only applicable to cases where the applicant (i) is currently living with a cohabiting partner in the same household; (ii) is living on shared resources with the cohabiting partner; and (iii) agrees to provide the personal and financial information of the cohabiting partner to the Social Welfare Department (SWD), regardless of whether the applicant’s cohabiting partner is/is not currently receiving OALA/other allowance. Such application will be subject to the means test assessment based on the “Financial Resource Limits for Married Couples”.)
- Annuity Schemes include “HKMC Annuity Plan” launched by HKMC Annuity Limited and other annuity schemes in the market. The payout under the annuity scheme(s) provided on a regular basis (normally on a monthly basis) is counted as income. If the regular payout is provided on quarterly, half-yearly or yearly basis, it will be apportioned according to the number of months covered as the monthly income. However, the pre-surrender value of the annuity scheme(s) will be disregarded under the asset test. The surrender value (if any) after surrendering the annuity scheme(s) will be counted as assets.
- Including those in Hong Kong, Macao, the Mainland or overseas separately or jointly owned by the applicant and/or his/her spouse/cohabiting partner (if applicable) or jointly owned with other person(s).
- Properties include land, real estate and parking space of any use in and outside FJ. Only the value of one residential property which is the principal place of residence in FJ and one parking space for self-use are regarded as “owner-occupied properties” and are disregarded under the asset test. Other real estate and parking space separately or jointly owned by the applicant and/or his/her spouse/cohabiting partner (if applicable) or jointly owned with other person(s) are regarded as “non-owner-occupied properties” and should be taken into account for assessment of “assets”.
- Accrued retirement benefits refer to the retirement benefits currently held in Mandatory Provident Fund (“MPF”) Scheme(s) or other retirement scheme(s). The estimated total amount of such accrued benefits is based on information on the latest benefit statement(s) issued by MPF trustee(s) or other retirement schemes trustee(s)/administrator(s) or information obtained through other relevant documents. For applicant’s spouse/cohabiting partner (if applicable) aged below 65, the accrued retirement benefits (only applicable to the accrued retirement benefits derived from mandatory contributions and tax deductible voluntary contributions) of the spouse/cohabiting partner are disregarded under the asset test while the monthly mandatory contributions to MPF Scheme(s) or other retirement scheme(s) are disregarded under the income test. However, the accrued retirement benefits withdrawn are treated as assets.

Payment commencement date

3. Upon receipt of the “Fujian Scheme Simplified Form”, SWD will take appropriate follow-up actions and verify the recipient’s eligibility for the allowance that he/she wants to convert to. Eligible recipients will receive OALA/OAA payment (after deducting the payment already made for the corresponding period) counting from the date of receipt of the application by SWD or the date of eligibility for conversion to OALA/OAA under the FJ Scheme, whichever is later. Upon conversion to OALA/OAA, the recipient must not at the same time be in receipt of any other allowance under the Social Security Allowance Scheme or assistance under the Comprehensive Social Security Assistance Scheme.

“Grace period” after receipt of allowance

4. In general, after being granted OALA, the recipient will be given a grace period of 12 months counting from the date of eligibility ^(Note). During the grace period, any changes in financial conditions which may affect the recipient’s eligibility due to excessive income and/or assets will be disregarded. If the recipient’s and/or his/her spouse’s/cohabiting partner’s (if applicable) income and/or assets has/have exceeded the prescribed limits after the grace period, such changes have to be reported to SWD or its agent immediately for arrangement of stop-payment.

Note: A grace period of 12 months counts from the date of eligibility for OALA (including OALA receiving in Hong Kong, Guangdong or FJ). If a recipient converts the place of receipt of OALA to Hong Kong, Guangdong or FJ, he/she will not be granted a 12-month grace period afresh but will only enjoy the remaining grace period (if any).

Case review

5. SWD will, with the assistance of SWD’s Agent, carry out annual review for all OALA/OAA cases under the FJ scheme by means of postal review or spot check in the form of home visit to establish the recipient’s continued eligibility. The recipient/appointee should cooperate fully with staff of SWD’s Agent.

Permissible limit of absence from FJ during receipt of allowance

6. When a recipient has resided in FJ for not less than 60 days in a payment year during receipt of allowance, he/she will be entitled to the payment of full year allowance. Correspondingly the total number of days of absence from FJ in the year cannot exceed 305 days (or 306 days in a leap year). Otherwise, the recipient will be eligible to receive the allowance only for the periods during which he/she has resided in FJ.

Reporting change in circumstances

7. If there is any change in circumstances of a recipient, and the change is related to the information provided at the time of making application, the recipient/appointee should report the change immediately to the SWD’s Agent or Social Security Field Unit (Guangdong Scheme and Fujian Scheme).

Waiver of medical charges

8. OALA recipients aged 75 or above under the FJ Scheme are entitled to the waiver of medical charges at public clinics or hospitals (including the Accident & Emergency Department) in Hong Kong. Upon registration for medical treatment or admission to a hospital, the recipients can inform the staff of the clinic or hospital that they are the recipient of OALA and produce valid identity document which they used for OALA application, such as Hong Kong Identity Card, Hong Kong Birth Certificate, Certificate of Exemption, Hong Kong Entry Permit, One-way Permit, Passport or Birth Certificate of other nations, etc. The staff of the clinic or hospital will confirm the recipients’ eligibility through the on-line medical waiver eligibility checking system and arrange medical fee waiving for them.
9. If the recipient has withdrawn the application or is no longer eligible for OALA, the waiver of medical charges will be revoked at the same time.

Important notes

10. The recipient or his/her appointee must provide true, correct and complete information to SWD or its agent. A person who knowingly or willfully provides false statement or withholds any information in order to obtain the allowance by deception commits a criminal offence. He/She is also breaking the law if he/she has the deliberate intention of not reporting changes in information provided which may cause a reduction of the amount of allowance payable or disqualification for the allowance. The recipient or his/her appointee may be liable to prosecution. Furthermore, any overpaid allowance must be refunded to SWD.

Enquiries

11. Enquiries can be made to Guangdong Scheme and Fujian Scheme Enquiry Line at 852-3105 3266 during the office hours (Monday to Friday at 8:45 a.m. to 1:00 p.m. and 2:00 p.m. to 6:00 p.m.; Saturday, Sunday and Public Holidays: closed).

收集個人資料聲明

Personal Information Collection Statement

向社會福利署提供個人資料*之前，請先細閱本聲明。

收集資料的目的

1. 社會福利署（社署）及／或獲社署提供津助／資助的非政府機構，或由社署委託的非政府機構，將會使用你所提供的個人資料，向你／申請人及／或你／申請人的家人提供你／申請人及／或你／申請人的家人所需要的及由社署及／或上述非政府機構提供的援助或服務，包括（但不限於）用於監察和檢討各項服務、處理有關你／申請人及／或你／申請人的家人所獲得服務的投訴、進行研究及調查、製備統計數字、履行法定職責等，以及追收與你／申請人及／或你／申請人的家人所獲得的援助／服務相關的債項。向社署提供個人資料純屬自願。不過，如果你未能提供所要求的個人資料，本署可能無法處理你的申請或向你／申請人及／或你／申請人的家人提供援助／服務。

可能轉移資料者

2. 你所提供的個人資料，會按需要知道的原則提供給在本署工作的職員。除此之外，該等個人資料亦可能會為上文第 1 段所述的目的而向下列機構／人士披露，或在上述情況下披露：
 - (a) 其他機構／人士（例如政府決策局／部門、醫院管理局、非政府機構、公用事業公司等），如該等機構／人士有參與以下事項：
 - (i) 審批及／或評估你／申請人及／或你／申請人的家人就上文第 1 段所提及社署及／或非政府機構向你／申請人及／或你／申請人的家人提供服務／援助而提出的任何申請；
 - (ii) 上文第 1 段所提及社署及／或非政府機構向你／申請人及／或你／申請人的家人所提供的服務／援助；或
 - (iii) 監察和檢討上文第 1 段所提及社署及／或非政府機構所提供的服務，或製備統計數字；
 - (b) 處理投訴的機構（例如申訴專員公署、個人資料私隱專員公署、社會工作者註冊局、立法會等），如果這些機構正在處理有關社署向你／申請人及／或你／申請人的家人所提供的服務或援助的投訴；
 - (c) 法律授權或法律規定須披露資料；或
 - (d) 你曾就披露資料給予訂明同意。

查閱個人資料

3. 按照《個人資料（私隱）條例》（第 486 章），你有權就社署所持有的有關你的個人資料提出查閱及改正要求。本署提供個人資料複本將須收取費用。如需查閱或改正社署收集的個人資料，請向以下人士提出：

職銜： 社會保障辦事處（廣東計劃及福建計劃）主任

地址： 香港上水龍琛路 39 號上水廣場 21 樓 2110-2111 室

*根據《個人資料（私隱）條例》（第 486 章），個人資料指符合以下說明的任何資料—

- (a) 直接或間接與一名在世的個人有關的；
- (b) 從該資料直接或間接地確定有關的個人的身份是切實可行的；及
- (c) 該資料的存在形式令予以查閱及處理均是切實可行的。

Please read this notice before you provide any personal data# to the Social Welfare Department.

Purposes of Collection

1. The personal data supplied by you will be used by the Social Welfare Department (SWD) and/or those non-governmental organisations (“NGOs”) which receive subventions or subsidies from or which are commissioned by SWD to provide you/the applicant and/or your/the applicant’s family members with assistance or service from SWD and/or the aforementioned NGOs which is relevant to the needs of you/the applicant and/or your/the applicant’s family members, including but not limited to monitoring and reviewing of services, handling complaints related to the services provided to you/the applicant and/or your/the applicant’s family members, conducting research and surveys, preparing statistics and discharging statutory duties, as well as recovering debt related to the assistance/service provided to you/the applicant and/or your/the applicant’s family members.. The provision of personal data to SWD is voluntary. However, if you fail to provide the personal data requested of you, we may not be able to process your application or provide assistance/service to you/the applicant and/or your/the applicant’s family members.

Classes of Transferees

2. The personal data you provide will be made available to persons working in SWD on a need-to-know basis. Apart from this, they may be disclosed to the parties or in the circumstances listed below for the purposes mentioned in paragraph 1 above -
 - (a) Other parties such as government bureaux/departments, the Hospital Authority, NGOs and public utility companies if they are involved in:
 - (i) processing and/or assessing any application from you/the applicant and/or your/the applicant’s family members for the provision of service/assistance to you/the applicant and/or your/the applicant’s family members by SWD and/or the NGOs mentioned in paragraph 1 above;
 - (ii) the provision of service/assistance to you/the applicant and/or your/the applicant’s family members by SWD and/or the NGOs mentioned in paragraph 1 above; or
 - (iii) monitoring and reviewing of the services provided by SWD and/or the NGOs mentioned in paragraph 1 above or preparing statistics;
 - (b) Complaint handling authorities such as the Office of the Ombudsman, the Office of the Privacy Commissioner for Personal Data, the Social Workers Registration Board, the Legislative Council, etc. if they are handling complaints about the services or assistance provided to you/the applicant and/or your/the applicant’s family members by SWD;
 - (c) Where such disclosure is authorised or required by law; or
 - (d) Where you have given your prescribed consent to such disclosure.

Access to Personal Data

3. You have the right to request access to and correction of your personal data held by SWD in accordance with the Personal Data (Privacy) Ordinance, Cap. 486. A fee is charged for supplying copies of personal data. Requests for access to and correction of personal data collected by SWD should be addressed to -

Post title : Supervisor, Social Security Field Unit (Guangdong Scheme and Fujian Scheme)

Address : Unit 2110-2111, 21/F., Landmark North, 39 Lung Sum Avenue, Sheung Shui, Hong Kong

Under the Personal Data (Privacy) Ordinance, Cap. 486, personal data means any data –

- (a) relating directly or indirectly to a living individual;
- (b) from which it is practicable for the identity of the individual to be directly or indirectly ascertained; and
- (c) in a form in which access to or processing of the data is practicable.