

Information Brief of Guangdong Scheme for Tenderers

Objective

(1) The Social Welfare Department (SWD) launched the Guangdong (GD) Scheme under the Social Security Allowance (SSA) Scheme on 1 October 2013 to provide Old Age Allowance (OAA), on a monthly basis, for eligible Hong Kong (HK) elderly people aged 65 or above who choose to reside in GD to meet their special needs arising from old age. Except for applicants aged 65 to 69, applicants of the GD Scheme are not required to go through a means test.

Eligibility Criteria

(2) An applicant is eligible for OAA under the GD Scheme if he/she:

(a) reaches the qualifying age of 65 years old or above;

(b) satisfies the following residence requirements:

(i) he/she must have been a HK resident for at least seven years; and

(ii) he/she must have resided in HK continuously for at least one year immediately before the date of application (absence from HK up to a maximum of 56 days during the one-year period is treated as residence in HK);

(c) is having an income and assets below the prescribed limits (**only applicable to applicant aged 65 to 69**);

(d) continues to reside in GD during receipt of allowance (a recipient under the GD Scheme will be required to reside in GD for at least 60 days within a payment year for obtaining a full-year payment of allowance. If a recipient has resided in GD for less than 60 days in a payment year, he/she is eligible to receive allowance only for the periods during which he/she has resided in GD);

(e) should surrender his/her public rental housing unit or delete his/her name from the tenancy before leaving HK if he/she is an authorized public housing tenant;

(f) is not in receipt of other allowance under the SSA Scheme or assistance under the Comprehensive Social Security Assistance Scheme; and

(g) is not being detained in legal custody or admitted to a penal institution.

Note:

(i) In determining whether an applicant has resided in HK continuously for at least one year immediately before the date of application, consideration can be given to disregarding absences arising from paid work outside HK during the one-year period, subject to there being sufficient documentary proof. Where an applicant has been absent from HK for more than 56 days during the one-year period because of the need to receive medical treatment outside HK, the Director of Social Welfare can consider exercising his discretion to disregard the absences exceeding the 56-day limit, subject to the reason for and evidence of receiving medical treatment outside HK being established.

(ii) Absence from HK means leaving HK for the Mainland, Macao or overseas countries/territories.

Application Procedures

(3) Applicants must complete the application procedures in person in HK. For applicants who can produce medical proof issued by public hospital/clinic indicating that they may not be able to travel to HK for the application due to health condition, SWD will refer the case to the contractor to assist the applicants in completing the application procedures in GD.

(4) Applicants are required to return the completed “GD Scheme Application Form” together with two recent photos and photocopies of all relevant supporting documents to the Social Security Field Unit (Guangdong Scheme and Fujian Scheme) [SSFU(GD Scheme & FJ Scheme)] by post or in person first. The “GD Scheme Application Form” and Guidance Notes can be downloaded from the SWD’s GD Scheme website (www.swd.gov.hk/gds) or obtained from any social security field units. Applicants can also obtain the Application Form and Guidance Notes from the SSFU(GD Scheme & FJ Scheme) by phone or by post.

(5) Upon receipt of an application, SWD will make arrangements for an interview with the applicant at the SSFU(GD Scheme & FJ Scheme). Applicants need to bring along original copies of relevant documents, such as HK Identity Card, travel documents, etc., when

attending the scheduled interview. Applicants aged 65 to 69 should also bring along original copies of identity documents of their spouse (if applicable) and relevant documents pertaining to their income and assets held by them and their spouse (if applicable). SWD may, where necessary, ask the applicants for supplementary information. When the investigation is completed, a notification letter will be issued to the applicants notifying them of the result.

Persons Unable to Make Application on Their Own

(6) If an applicant is medically certified to be unfit to make a statement rendering him/her unable to make an application by himself/herself, which is verified by SWD, an Appointee will be appointed by the Director of Social Welfare to act on his/her behalf [referred to as the Appointee cases]. The Appointee is required to bring along his/her own identity document(s) and the bank passbook for receiving the applicant's allowance (joint bank account is not accepted).

Appointment of SWD's Agent (the contractor)

(7) SWD will appoint an agent through open tendering exercise for processing of applications (only applicable to ill health applicants) and provision of services for elderly persons receiving Old Age Allowance under the GD Scheme.

Service Delivery Mode By Means of Postal Review and Spot Check

(8) SWD will, through assistance of SWD's Agent, carry out regular reviews for all GD cases by means of Postal Review¹ (by mail) or Spot Check² (by home visit). Forms for Postal Review and Spot Check are provided by SWD for use of SWD's Agent. Upon receipt of the Postal Review form sent by SWD's Agent, a recipient is required to complete the Postal Review form, have his/her declaration witnessed by a relative or friend aged 18 or above and return the completed Postal Review form to SWD's Agent within the time specified in the letter. If the recipient fails to complete the Postal Review form within the specified time and is found lost of contact by all means (such as by phone or by mail), SWD

¹ Postal Review means the annual case reviews for each GD case **by mail** for the purpose of verifying the financial and other conditions of the recipients living in GD which may affect the amount of payment or their continuous eligibility for allowance under the GD Scheme

² Spot Check means the regular case reviews for each GD case **by means of home visits** for the purpose of verifying the financial and other conditions of the recipients living in GD which may affect the amount of payment or their continuous eligibility for allowance under the GD Scheme

will not be able to establish the recipient's continued eligibility for GD Scheme, SWD will consider stopping the GD Scheme payment to the recipient. SWD's Agent will also conduct Spot Check for GD cases by means of home visit so as to ascertain a recipient's continued eligibility for the allowance. SWD's Agent will pay a home visit to the recipients living in GD and complete the form for Spot Check based on the information provided by the recipients. If home visit is unsuccessful and the whereabouts of the recipient is unknown despite repeated attempts through different means of contact, SWD will consider arranging stop-payment.

(9) Except for new and reactivated cases referred to SWD's Agent during the second half of a financial year (i.e. from 1 October to 31 March), Spot Check or Postal Review should be conducted for each GD Scheme case every financial year mainly for the purpose of checking the recipient's financial (for recipient aged 65 to 69) and other conditions which may affect the allowance paid or payable, and confirming recipient's continued eligibility for the allowance.

(10) The onus of selecting cases for Postal Review and Spot Check lies with SWD's Agent. An annual Spot Check should be conducted for 100% of the GD Scheme cases where the recipients are represented by Appointees approved by the Government Representative and 20% of the remaining non-appointee cases selected on a random basis. Cases not selected for Spot Check are subject to Postal Review. Cases other than those with an Appointee should be reviewed by Spot Check once at least every five years.

Reporting Changes in Circumstances

(11) In case of any change in circumstances, such as change of address, absence from Guangdong exceeding the permissible limit (305 days/306 days in a leap year), income or total value of assets exceeding the prescribed limits or change of marital status (means test applicable to applicants aged 65 to 69 only), being detained in legal custody or admission to a penal institution, etc., the applicant or his/her Appointee should report the change immediately to the SSFU (Guangdong Scheme & FJ Scheme) or SWD's Agent so that timely adjustment to the amount of allowance can be made.

(12) SWD conducts data matching periodically/on need basis with other government departments, banks and organizations (including the Immigration Department, Treasury, Correctional Services Department, Land Registry, Companies Registry, and Transport Department, etc.) to cross-check the information provided by the applicant or his/her Appointee.