



社會福利署

Social Welfare Department

Application for Social Security Allowance Guidance Notes

Introduction

The Social Security Allowance Scheme includes Old Age Allowance, Disability Allowance (comprising Normal Disability Allowance and Higher Disability Allowance) and Old Age Living Allowance.

The Scheme is non-contributory. Old Age Allowance and Disability Allowance are designed to provide a monthly allowance on a non-means-tested basis to Hong Kong residents who are 70 years of age or above or who are severely disabled to meet their special needs arising from old age or disability respectively. Old Age Living Allowance is to provide a special allowance per month to supplement the living expenses of Hong Kong residents aged 65 or above who are in need of financial support and having income and assets not exceeding the prescribed limits.

Contents

	Page
I. Eligibility Criteria	4-14
II. Application Procedures	15
III. Person Unable to Make Application by Himself/Herself	16
IV. Responsibilities of the Applicants/Guardians/Appointees	16
V. Collection of Personal Data	17-18
VI. How to Complete the Application Form	18-27
VII. Documents Required for Application	28-30

I. Eligibility Criteria

1. An applicant is eligible for an allowance under the Scheme if he/she:

A. Old Age Allowance

		Old Age Allowance
(a)	reaches the qualifying age.	aged 70 or above
(b)	<p>satisfies the following residence requirements:</p> <p>(1) he/she must have been a Hong Kong resident for at least seven years; and</p> <p>(2) he/she must have resided in Hong Kong continuously for at least one year immediately before the date of application (absence from Hong Kong up to a maximum of 90 days during the one-year period is treated as residence in Hong Kong).</p> <p><u>Note:</u></p> <p>(i) Persons whose presence in Hong Kong is unlawful or persons who are permitted to stay in Hong Kong for a purpose other than residence (for example, imported workers or visitors) are excluded from the Scheme.</p> <p>(ii) In determining whether an applicant has resided in Hong Kong continuously for at least one year immediately before the date of application, consideration can be given to disregarding absences arising from paid work outside Hong Kong during the one-year period, subject to there being sufficient documentary proof. Where an applicant has been absent from Hong Kong for more than 90 days during the one-year period because of the need to receive medical treatment outside Hong Kong, the Director of Social Welfare can consider exercising his discretion</p>	√

		Old Age Allowance
(b) (cont'd)	<p>to disregard the absences exceeding the 90-day limit, subject to the reason for and evidence of receiving medical treatment outside Hong Kong being established.</p> <p>(iii) Absence from Hong Kong means leaving Hong Kong for the Mainland, Macao or overseas countries/territories.</p>	√
(c)	continues to reside in Hong Kong during receipt of the allowance (see “Permissible Limit of Absence from Hong Kong during Receipt of Allowance” at <u>Note 1 on page 11</u>).	√
(d)	is not in receipt of other allowance under the Scheme or assistance under the Comprehensive Social Security Assistance Scheme.	√
(e)	is not being detained in legal custody or admitted to a penal institution.	√

B. Disability Allowance

		Normal Disability Allowance	Higher Disability Allowance
(a)	<p>is certified by the Director of Health or the Chief Executive, Hospital Authority to be severely disabled (see definition of “severely disabled” at <u>Note 2 on page 12</u>) and his/her disabling condition will persist for at least 6 months.</p> <p><u>Note:</u></p> <p>A Disability Allowance applicant staying in a private hospital might be considered by his/her attending registered medical practitioner unsuitable to be brought to any of the public hospitals/clinics for medical assessment. Under this exceptional circumstance, the Social Welfare Department (SWD) can accept the medical assessment made by the attending registered medical practitioner of the private hospital subject to meeting other prescribed conditions. For details, please contact the social security field unit concerned.</p>	√	√
(b)	<p>satisfies the following residence requirements:</p> <p>(1) he/she must have been a Hong Kong resident for at least seven years; and</p> <p>(2) he/she must have resided in Hong Kong continuously for at least one year immediately before the date of application (absence from Hong Kong up to a maximum of 90 days during the one-year period is treated as residence in Hong Kong).</p> <p><u>Note:</u></p> <p>(i) Persons whose presence in Hong Kong is unlawful or persons who are permitted to stay in Hong Kong for a purpose other than residence (for example, imported workers or visitors) are excluded from the Scheme.</p> <p>(ii) Hong Kong residents aged below 18 applying for the allowance are exempted from the residence requirements in (1) and (2) above.</p>	√	√

		Normal Disability Allowance	Higher Disability Allowance
(b) (cont'd)	<p>(iii) In determining whether an applicant has resided in Hong Kong continuously for at least one year immediately before the date of application, consideration can be given to disregarding absences arising from full-time study or paid work outside Hong Kong during the one-year period, subject to there being sufficient documentary proof. Where an applicant has been absent from Hong Kong for more than 90 days during the one-year period because of the need to receive medical treatment outside Hong Kong, the Director of Social Welfare can consider exercising his discretion to disregard the absences exceeding the 90-day limit, subject to the reason for and evidence of receiving medical treatment outside Hong Kong being established.</p> <p>(iv) Absence from Hong Kong means leaving Hong Kong for the Mainland, Macao or overseas countries/territories.</p>	√	√
(c)	continues to reside in Hong Kong during receipt of the allowance (see “Permissible Limit of Absence from Hong Kong during Receipt of Allowance” at <u>Note 1 on page 11</u>).	√	√
(d)	is not in receipt of other allowance under the Scheme or assistance under the Comprehensive Social Security Assistance Scheme.	√	√
(e)	is not being detained in legal custody or admitted to a penal institution.	√	√

		Normal Disability Allowance	Higher Disability Allowance
(f)	<p>in addition to meeting the eligibility criteria for Normal Disability Allowance above, a Higher Disability Allowance applicant must be certified by the Director of Health or the Chief Executive, Hospital Authority [or under exceptional circumstances by a registered medical practitioner of a private hospital, see <u>Note under (a) on page 6</u>] to be in need of constant attendance from others in his/her daily life and is <u>not</u> receiving care in residential institutions subsidised by the government (including subsidised places in subvented/contract homes and residential care homes under various bought place schemes) or all public hospitals and institutions under the Hospital Authority, or boarding in special schools under the Education Bureau.</p> <p><u>Note:</u></p> <p>If a Higher Disability Allowance applicant has been admitted into the above residential institutions/public hospitals and institutions for receiving care or special schools under the Education Bureau for boarding service at the time of application, he/she will only be given Normal Disability Allowance. As for existing Higher Disability Allowance recipient, his/her allowance will be adjusted to Normal Disability Allowance if he/she has been admitted into residential institutions/public hospitals and institutions for receiving care or special schools under the Education Bureau for boarding service for more than 29 days.</p>	Not applicable	√

C. Old Age Living Allowance

		Old Age Living Allowance
(a)	reaches the qualifying age.	aged 65 or above
(b)	<p>satisfies the following residence requirements:</p> <p>(1) he/she must have been a Hong Kong resident for at least seven years; and</p> <p>(2) he/she must have resided in Hong Kong continuously for at least one year immediately before the date of application (absence from Hong Kong up to a maximum of 90 days during the one-year period is treated as residence in Hong Kong).</p> <p><u>Note:</u></p> <p>(i) Persons whose presence in Hong Kong is unlawful or persons who are permitted to stay in Hong Kong for a purpose other than residence (for example, imported workers or visitors) are excluded from the Scheme.</p> <p>(ii) In determining whether an applicant has resided in Hong Kong continuously for at least one year immediately before the date of application, consideration can be given to disregarding absences arising from paid work outside Hong Kong during the one-year period, subject to there being sufficient documentary proof. Where an applicant has been absent from Hong Kong for more than 90 days during the one-year period because of the need to receive medical treatment outside Hong Kong, the Director of Social Welfare can consider exercising</p>	√

		Old Age Living Allowance
(b) (cont'd)	<p>his discretion to disregard the absences exceeding the 90-day limit, subject to the reason for and evidence of receiving medical treatment outside Hong Kong being established.</p> <p>(iii) Absence from Hong Kong means leaving Hong Kong for the Mainland, Macao or overseas countries/territories.</p>	√
(c)	continues to reside in Hong Kong during receipt of the allowance (see “Permissible Limit of Absence from Hong Kong during Receipt of Allowance” at <u>Note 1 on page 11</u>).	√
(d)	is not in receipt of other allowance under the Scheme or assistance under the Comprehensive Social Security Assistance Scheme.	√
(e)	is not being detained in legal custody or admitted to a penal institution.	√
(f)	is having income and assets not exceeding the prescribed limits (for “Income and Asset Limits”, see <u>Note 3 on pages 13 and 14</u>).	√

Note 1 : Permissible Limit of Absence from Hong Kong during Receipt of Allowance

1. Where a Social Security Allowance recipient has resided in Hong Kong for not less than 60 days in a payment year, his/her temporary absences from Hong Kong (i.e. leaving Hong Kong for the Mainland, Macao or overseas countries/territories) will not affect the payment of allowance on condition that the total number of days of absence in the year does not exceed 305 days (or 306 days in a leap year). In other words, a Social Security Allowance recipient will be entitled to a full year allowance if he/she satisfies the minimum residence period of 60 days in a payment year.
2. If a Social Security Allowance recipient has resided in Hong Kong for less than 60 days in a payment year, he/she is not entitled to any absence allowance in that year. He/She is eligible to receive allowance only for the periods during which he/she has resided in Hong Kong. If any overpayment involved, the recipient/guardian/appointee must refund the overpaid allowance to SWD.

Note:

- (1) The payment year under the Social Security Allowance Scheme refers to the 12-month period from the date when the recipient meets the eligibility criteria for receiving the allowance (For example, if a person was eligible for receiving the allowance from 15.6.2023, the first payment year is from 15.6.2023 to 14.6.2024, the second payment year is from 15.6.2024 to 14.6.2025 and so forth).
- (2) Subject to there being sufficient documentary proof, consideration can be given to disregarding a recipient's absences from Hong Kong arising from paid work outside Hong Kong.
- (3) Consideration can also be given to disregarding a Disability Allowance recipient's absences from Hong Kong arising from full-time study on condition that there is sufficient documentary proof.

Note 2 : Definition of “Severely Disabled”

A person will be considered as severely disabled within the meaning of this Scheme if he/she is certified by the Director of Health or the Chief Executive of the Hospital Authority (or under exceptional circumstances by a registered medical practitioner of a private hospital) as falling into one of the following categories:

a. Disabling Physical or Mental Condition

1. Loss of functions of two limbs
2. Loss of functions of both hands or of all fingers and both thumbs
3. Loss of functions of both feet
4. Total loss of sight
5. Total paralysis (quadriplegia)
6. Paraplegia
7. Illness, injury or deformity resulting in being bedridden
8. Any other conditions including visceral diseases which produces a degree of disablement as specified^{Note}. That means, a person is suffering from a disabling physical or mental condition (including but not limited to organic brain syndrome, intellectual disability, psychosis, neurosis, personality disorder) which produces a degree of disablement broadly equivalent to that in (1) to (7) above, that it is to say, the person needs substantial help from others to cope with daily life.

b. Profoundly Deaf

This means that a person, who suffers from a perceptive or mixed deafness with a hearing loss of 85 decibels or more in the better ear for pure tone frequencies of 500, 1 000 and 2 000 cycles per second, or 75 to 85 decibels with other physical handicaps which include lack of speech and distortion of hearing.

Note:

The severe disability produces significant restriction or lack of ability or volition comparing to other persons of the same age to perform **at least one or more** of the following activities in daily living to the extent that substantial help from others is required:

- (1) working in the original occupation and performing any other kind of work for which he/she is suited (not applicable for person aged below 15 years)
- (2) coping with self-care and personal hygiene such as feeding, dressing, grooming, toileting and/or bathing
- (3) maintaining one's posture and dynamic balance while standing or sitting, for daily activities, managing indoor transfer (bed/chair, floor/chair, toilet transfer), travelling to clinic, school, place of work
- (4) expressing oneself, communicating and interacting with others, maintaining cognitive abilities (orientation, attention, concentration, memory, judgment, thinking, learning ability, etc.), maintaining emotional control and social behaviour

Note 3 : Income and Asset Limits for Old Age Living Allowance Applicants

		<u>Single person⁽¹⁾</u>	<u>Married couples⁽²⁾</u>
Old Age Living Allowance	Total income per month (with effect from 1 February 2024)	\$10,710	\$16,330
	Total asset value (with effect from 1 February 2024)	\$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.

Note:

- (1) “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.
- (2) “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, 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”.)
- (3) 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.
- (4) 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).
- (5) Properties include land, real estate and parking space of any use in and outside Hong Kong. Only the value of one residential property which is the principal place of residence in Hong Kong 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”.
- (6) 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.

II. Application Procedures

1. The applicant or his/her relative/friend can make an application directly with a social security field unit near to his/her place of residence by phone, by fax, by e-mail, by post, by online forms or in person. An application may also be made through a referral to SWD by another government department or a non-governmental organisation. Application form and Guidance Notes can be downloaded from SWD's website (<http://www.swd.gov.hk>) or obtained from any social security field units. If an applicant is aged below 18, the application should be made by his/her parent or guardian.
2. Please return the completed application form together with photocopies of relevant supporting documents listed in Item VII (see "Documents Required for Application" on pages 28-30) to the social security field unit by post or in person. Upon receipt of application, SWD will make arrangements for an interview with the applicant.
3. Please bring along the original copies of identity documents and travel documents (including Passports, HKSAR Re-entry Permit, Certificate of Identity, Home Visit Permit, HKSAR Document of Identity for Visa Purposes, Hong Kong Entry Permit, One-way Permit and the travel documents issued by other countries, etc.) for verification during the process of application. SWD may, where necessary, ask the applicants for supplementary information. It will speed up the process of an application if the applicant or his/her guardian/appointee can provide complete information and produce all the necessary supporting documents.
4. All the application procedures are to be processed in Hong Kong. After completion of investigation, a formal notification letter will be sent to the applicant. Subject to meeting all the eligibility criteria, payment will be arranged. Payment will be calculated from the date of receipt of application by SWD (or the date of application or referral if the application is referred by another organisation) or the date of eligibility, whichever is later.

Note:

SWD accepts application for Old Age Living Allowance/Old Age Allowance within one month prior to the applicant's reaching the respective qualifying age (i.e. the 65th or 70th birthday) for the allowance. Under this arrangement, the date the applicant reaching the respective qualifying age the allowance is regarded as the date of application. The payment of allowance will be calculated from the date the applicant fulfils the qualifying age and satisfies all the eligibility criteria.

III. Person Unable to Make Application by Himself/Herself

1. If an applicant is aged below 18 without a parent or legal guardian or is an adult aged 18 or above who is medically certified to be unfit to make a statement on 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.

IV. Responsibilities of the Applicants/Guardians/Appointees

1. Applicants/Guardians/Appointees must provide true, correct and complete information to SWD. A person who knowingly or wilfully 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 the changes of given information which may cause a reduction of the amount of allowance payable or disqualification for the allowance. The applicant or his/her guardian/appointee may be liable to prosecution. Furthermore, any overpaid allowance must be refunded to SWD.
2. In case of any change in circumstances, such as change of address, admission to or discharge from residential institutions subsidised by the government or all public hospitals and institutions under the Hospital Authority, or boarding or no longer boarding in special schools under the Education Bureau (applicable to Higher Disability Allowance applicants only (see item (f) on page 8)), absence from Hong Kong exceeding the permissible limit (see Note 1 on page 11), income or total value of assets exceeding the prescribed limits after the date specified (see Note 3 on pages 13 and 14) or change of marital status (applicable to Old Age Living Allowance applicants only), being imprisoned or detained in legal custody, etc., the applicant or his/her guardian/appointee should report the change immediately to the concerned social security field unit of SWD so that timely adjustment to the amount of allowance can be made.
3. SWD conducts data matching periodically/on need basis with other government departments, banks and organisations (including the Immigration Department, Treasury, Correctional Services Department, Land Registry, Companies Registry, the Hospital Authority, Transport Department and HKMC Annuity Limited, etc.) to cross-check the information given by the applicant or his/her guardian/appointee. SWD will also conduct reviews on targeted Old Age Allowance/Disability Allowance/Old Age Living Allowance cases through different means including home visits or by post. The applicant or his/her guardian/appointee should cooperate fully with SWD.

V. Collection of Personal Data[#]

Purposes of Collection

1. The personal data supplied by you will be used by 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 the supervisor of the respective social security field units (please refer to Appendix 1 of the Guidance Notes for addresses and telephone numbers of social security field units).

[#] 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.

VI. How to Complete the Application Form

1. Please complete all items in the application form in block letters with a blue or black ball pen. Please cross out any incorrect entries and sign against the amendment. Do not use correction fluid.
2. Please ensure the relevant parts of the application form are fully completed before submission. Otherwise, SWD will return it to you for completion. This will delay the processing of your application.

✧ **Old Age Allowance applicant should complete the following parts:**

Part 1	Personal data of Applicant / Applicant's Spouse / Applicant's Cohabiting Partner / Guardian / Appointee / Agent
Part 2	Residence requirements
Part 5	Travel document
Part 6	Applicant's / Guardian's / Appointee's / Agent's account particulars
Part 9	Declaration and undertaking

✧ **Normal Disability Allowance applicant should complete the following parts:**

Part 1	Personal data of Applicant / Applicant's Spouse / Applicant's Cohabiting Partner / Guardian / Appointee / Agent
Part 2	Residence requirements
Part 5	Travel document
Part 6	Applicant's / Guardian's / Appointee's / Agent's account particulars
Part 9	Declaration and undertaking

✧ **Higher Disability Allowance applicant should complete the following parts:**

Part 1	Personal data of Applicant / Applicant's Spouse / Applicant's Cohabiting Partner / Guardian / Appointee / Agent
Part 2	Residence requirements
Part 4	Admission to residential institutions subsidised by the government / all public hospitals and institutions under the Hospital Authority or Boarding in special schools under the Education Bureau
Part 5	Travel document
Part 6	Applicant's / Guardian's / Appointee's / Agent's account particulars
Part 9	Declaration and undertaking

✧ **Old Age Living Allowance applicant should complete the following parts:**

Part 1	Personal data of Applicant / Applicant's Spouse / Applicant's Cohabiting Partner / Guardian / Appointee / Agent
Part 2	Residence requirements
Part 3	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")
Part 5	Travel document
Part 6	Applicant's / Guardian's / Appointee's / Agent's account particulars
Part 9	Declaration and undertaking

3. This part provides the applicant with the steps to complete each item in the application form. Examples are given for illustration. If the applicant or his/her guardian/appointee needs further assistance to complete the application form, he/she can contact the staff of the social security field unit.



社會福利署
Social Welfare Department

公共福利金計劃 Social Security Allowance Scheme 申請表

注意：此表
如書

Note: This form is issued for office use only. Please read carefully the "Application for Social Security Allowance Guidance Notes" and complete all items in this form. Do not use correction fluid. Please cross out any incorrect entries and sign against the amendment.

請根據你所申請的津貼，選擇下列其中一項，並參閱此表格的第8頁填妥相關部分。

Please select one in accordance with the type of allowance you would like to apply and refer to page 8 of this form to complete the relevant parts.

☒ 長者生活津貼 Old Age Living Allowance

☐ 普通傷殘津貼 Normal Disability Allowance

☐ 高齡津貼 Old Age Allowance

第一部分 申請人／申請人配偶 個人資料

Part 1 Personal data of Applicant Guardian / Appointee /

甲、申請人的個人資料 A. Applicant's personal data

The date of birth should be exactly as shown on the Hong Kong Identity Card, Hong Kong Birth Certificate, other proofs of identity or travel documents, e.g. Passport.

Sex: male female
出生日期 Date of birth: 1946 Year 2 Month 1 Day

國籍 Country of origin: ☒ 中國 China ☐ 其他(請註明) Others(Please specify)

取得香港居民身份日期 Date of acquiring Hong Kong resident status: 2002 Year 10 Month 1 Day

婚姻狀況 Marital status: ☐ 未婚 Never Married ☒ 已婚 Married ☐ 同居(註) Cohabiting(Note)

The date of acquiring Hong Kong resident status can be referred to the Hong Kong Identity Card (HKIC), Hong Kong Birth Certificate, other proofs of identity or travel documents, e.g. Passport. If the applicant does not possess any document to prove the date of acquiring Hong Kong resident status, please fill in the first day of the month and year of the first registration of your HKIC. The relevant month and year can be found in the bracket under the Date of Issue of the applicant's HKIC, for example, (10-02) which means you can fill in 1st October 2002.

此欄供本署填寫 For office use

檔案編號 Casefile Reference: [] - S - []
申請日期 Date of: [] Year [] Month [] Day

藍色原子筆，以正楷填寫。

The name of the applicant/applicant's spouse or cohabiting partner/guardian/appointee/agent should be exactly as shown on the Hong Kong Identity Card. For an applicant without a Hong Kong Identity Card, the name on the Hong Kong Birth Certificate or other proofs of identity should be stated.

(英文) Name in English: LEE SIK TIN

類別 Type of identity document: ☒ 香港身份證 HK Identity Card ☐ 香港出生證明書 HK Birth Certificate
☐ 其他(請註明) Others(Please specify)

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".

教育程度
Education level

☐ 未受教育 ☐ 幼稚園／幼兒中心 ☐ 小學 ☒ 中學 * 1-3 / 4-5 / 6-7 年級
No schooling Kindergarten / child care centre Primary Secondary * 1-3 / 4-5 / 6-7

☐ 專業教育(完成*中三／中五後入讀) ☐ 專上教育(*非學位／學位／深造課程)
Technical / vocational training / commercial school Tertiary(*non-degree / degree-undergraduate level /
(post *F.3 / F.5) degree-post-graduate level)

住址
Residential address

*香港／九龍／新界
*~~HK~~ / ~~KLN~~ / ~~NT~~

Flat C, 18/F, 96 Yee Tin Street

居所類別
Accommodation status

☐ 自置 ☐ 租住
Self-owned Rent

Please cross out any incorrect entries
and sign against the amendment.
Do not use correction fluid.

2228 2128

通訊地址
Correspondence address

*香港／九龍／新界
*HK / KLN / NT

流動電話號碼
Mobile phone number

~~62~~ 6666 6666

(如與住址不同，始須填寫)
(Only if different from residential address)

See Sk 7 in

B. Personal data of the spouse or cohabiting partner (only applicable to an Old Age Living Allowance applicant whose marital status is "Married" or "Cohabiting")

姓名 (中文)
Name in Chinese

吳蘭

(英文)
Name in English

NG LAN

身份證明文件號碼
Identity document number

E222223(3)

Type of identity document

☒ 香港身份證
HK Identity Card

☐ 其他(請註明)
Others(Please specify)

性別
Sex

☐ 男 Male ☒ 女 Female

出生日期
Date of birth

1946 年 12 月 2 日
Year Month Day

住址
Residential address

*香港／九龍／新界
*HK / KLN / NT

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

住宅電話號碼
Home telephone number

2228 2128

流動電話號碼
Mobile phone number

6668 8888

☐ 請在適當方格內填上「√」號。 * 請刪去不適用字句。
Tick as appropriate. Delete whichever is inappropriate.

Please refer to paragraph 1 of the “Application Procedures” on page 15 and “Person Unable to Make Application by Himself/Herself” on page 16.

丙、*監護人／受委人的個人資料（只適用於十八歲以下或未能親自提出申請的申請人）
C. *Guardian / Appointee's personal data (only applicable to an applicant aged under 18 or who is unable to make application by himself / herself)

姓名 (中文) Name in Chinese	_____	(英文) Name in English	_____
身份證明文件號碼 Identity document number	_____	類別 Type of identity document	<input type="checkbox"/> 香港身份證 HK Identity Card <input type="checkbox"/> 其他 (請註明) Others (Please specify) _____
與申請人關係 Relationship with applicant	_____	關係證明文件 Proof of relationship	<input type="checkbox"/> 香港出生證明書 HK Birth Certificate <input type="checkbox"/> 其他 (請註明) Others (Please specify) _____
住址 Residential address	*香港／九龍／新界 *HK / KLN / NT		
住宅電話號碼 Home telephone number	_____		

Under special circumstances, an agent will be appointed by the Director of Social Welfare for receiving payment.

丁、代理人的個人資料（只適用於本署接納為有需要授權第三者領款的申請人）
D. Agent's personal data (only applicable to an applicant who is accepted for requiring a third party to act as an agent)

姓名 (中文) Name in Chinese	_____	(英文) Name in English	_____
身份證明文件號碼 Identity document number	_____	類別 Type of identity document	<input type="checkbox"/> 香港身份證 HK Identity Card <input type="checkbox"/> 其他 (請註明) Others (Please specify) _____
與申請人關係 Relationship with applicant	_____	住址 Residential address	*香港／九龍／新界 *HK / KLN / NT

Please refer to item (b) on pages 4 and 5 or pages 6 and 7 or pages 9 and 10.

Tick this box if you are able to declare the exact number of days of your pre-application absences from Hong Kong. If you haven't left Hong Kong, please fill in “0” day.

第二部分 居港規定（只適用於十八歲以下或未能親自提出申請的申請人） Part 2 Residence requirements (only applicable to an applicant aged under 18 or who is unable to make application by himself / herself)

1. 申請人在申請日期前是否已成為香港居民最少七年？ Has the applicant been a Hong Kong resident for at least seven years before the date of application?	<input checked="" type="checkbox"/> 是 Yes	<input type="checkbox"/> 否 No
2. 請在下列句子中選擇其中一句，以說明在緊接申請日期前一年的離港日數。 Please select one sentence below to state the total number of days of absence during the one-year period immediately before the date of application.		
<input checked="" type="checkbox"/> 申請人在緊接申請日期前一年離港共 _____ 天。 The applicant has been absent from Hong Kong for a total of <u>43</u> days during the one-year period immediately before the date of application		
<input type="checkbox"/> 申請人在緊接申請日期前一年內並無離港超過 90 天。 The applicant has been absent from Hong Kong for not more than 90 days during the one-year period immediately before the date of application.		
<input type="checkbox"/> 申請人未能確定在緊接申請日期前一年中的離港日數。 The applicant cannot ascertain the exact number of days of absence during the one-year period immediately before the date of application.		

Tick this box if you cannot recall the number of days of your pre-application absences from Hong Kong.

Tick this box if you are unable to tell the exact number of days of your pre-application absences from Hong Kong, but you have been absent from Hong Kong for not more than 90 days during this period.

第三部分 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」）的入息及資產（詳情請參閱「公共福利金計劃申請指引」第10頁註三）

Part 3 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") (please refer to Note 3 on pages 13 and 14 of "Application for Social Security Allowance Guidance Notes" for details)

甲. 每月入息（不包括子女、親戚或朋友等金錢上的津貼）
(Monthly income (excluding contributions from family members, relatives and friends, etc.))

If the applicant receives payout from annuity scheme, please select "Yes" in the row of "HKMC Annuity Plan" or other annuity scheme(s). If the applicant receives payout from both "HKMC Annuity Plan" and other annuity scheme(s), please select "Yes" in both of the rows.

If the applicant's marital status is "Married" or "Cohabiting", please fill in his/her spouse's or cohabiting partner's income and assets.

If the applicant receives a monthly payout of \$5,000 from annuity scheme(s), please tick this box and fill in \$5,000. If the applicant receives \$15,000 per quarter, please apportion it into monthly payout (i.e. \$15,000 ÷ 3 months = \$5,000) and fill in as his/her monthly income.

$$\text{\$3,000} + \text{\$2,000} + \text{\$5,000} = \text{\$10,000}$$

Note 3 on pages 13 and 14 of "Application for Social Security Allowance Guidance Notes"

申請人 Applicant		*配偶 Spouse / 同居人士 Cohabiting Partner	
1. 土地／非自住物業 Land / non-owner-occupied property	<input type="checkbox"/> 沒有 No <input checked="" type="checkbox"/> 有 Yes \$ 200 000	<input checked="" type="checkbox"/> 沒有 No <input type="checkbox"/> 有 Yes \$	
2. 現金 Cash in hand	<input type="checkbox"/> 沒有 No <input checked="" type="checkbox"/> 有 Yes \$ 1 000	<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 checked="" type="checkbox"/> 有 Yes \$ 20 000	<input type="checkbox"/> 沒有 No <input type="checkbox"/> 有 Yes \$	
4. 股票及股份的投資（包括債券、基金及累積退休權益） Investments in stocks and shares (including bonds, trust fund and accrued retirement benefits)	<input type="checkbox"/> 沒有 No <input checked="" type="checkbox"/> 有 Yes \$ 30 000	<input checked="" type="checkbox"/> 沒有 No <input type="checkbox"/> 有 Yes \$	
5. 金條及金幣等 Gold bars and gold coins, etc.	<input checked="" type="checkbox"/> 沒有 No <input type="checkbox"/> 有 Yes \$	<input type="checkbox"/> 沒有 No <input checked="" type="checkbox"/> 有 Yes \$ 35 000	
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 checked="" type="checkbox"/> 沒有 No <input type="checkbox"/> 有 Yes \$	<input checked="" type="checkbox"/> 沒有 No <input type="checkbox"/> 有 Yes \$	
總值 Total value	\$ 2 5 1 0 0 0 0 0 0	\$ 1 6 0 0 0 0 0 0 0	

If the applicant's marital status is "Married" or "Cohabiting", please fill in his/her spouse's or cohabiting partner's income and assets.

☐ 請在適當方格內填上「✓」
Tick as appropriate.

$$\text{\$200,000} + \text{\$1,000} + \text{\$20,000} + \text{\$30,000} = \text{\$251,000}$$

Please refer to item (f) on page 8.

第四部分 受政府資助的院舍／醫院管理局轄下所有的公立醫院及機構或在教育局轄下的特殊學校寄宿（只適用於高額傷殘津貼申請人）
Part 4 Admission to residential institutions subsidised by the government / all public hospitals and institutions under the Hospital Authority or Boarding in special schools under the Education Bureau (only applicable to a Higher Disability Allowance applicant)

甲. 申請人是否已入住受政府資助的院舍（包括津助／合約院舍及參與不同買位計劃院舍的資助宿位）／醫院管理局轄下所有的公立醫院及機構接受住院照顧或教育局轄下的特殊學校寄宿？

A. Whether the applicant has been admitted into residential institutions subsidised by the government (including subsidised places in subvented / contract homes and residential care homes under various bought place schemes) / all public hospitals and institutions under the Hospital Authority for receiving care or special schools under the Education Bureau for boarding service?

☐ 否
No

☐ 是（請註明如下）
Yes (Please specify as below)

院舍／公立醫院及機構／特殊學校名稱 Name of institution/public hospital and institution/special school	入住日期 Date of admission

乙. 申請人是否已獲派宿位將會入住受政府資助的院舍（包括津助／合約院舍及參與不同買位計劃院舍的資助宿位）／醫院管理局轄下所有的公立醫院及機構或在教育局轄下的特殊學校寄宿？

B. Has the applicant been allocated a place in residential institutions subsidised by the government (including subsidised places in subvented / contract homes and residential care homes under various bought place schemes) / all public hospitals and institutions under the Hospital Authority or boarding in special schools under the Education Bureau?

☐ 否
No

☐ 是（請註明如下）
Yes (Please specify as below)

院舍／公立醫院及機構／特殊學校名稱 Name of institution/public hospital and institution/special school	入住日期 Date of admission

第五部分 旅遊證件
Part 5 Travel document

申請人是否持有任何有效的或已過期的或已失效的旅遊證件？

Does the applicant possess any valid or expired or invalid travel document(s)?

☐ 否
No

☒ 是（請註明如下）
Yes (Please specify as below)

證件類別 Document type	證件 Document	簽發日期 Date of issue	有效期至 Date of expiry
Home Visit Permit	H12345	01-09-2020	31-08-2030
HKSAR Passport	H0010	01-06-2020	31-05-2030
Russian Passport	ZBA123	16-01-2017	15-01-2027

☐ 請在
Tick as

Travel documents include Passports, HKSAR Re-entry Permit, Certificate of Identity, Home Visit Permit, HKSAR Document of Identity for Visa Purposes, Hong Kong Entry Permit, One-way Permit and the travel documents issued by other countries, etc.

SWD307 (Re

Account name, name of bank and account number should be exactly as shown on the bank account document (only sole and not joint accounts are acceptable for payment purposes).

第六部分 *申請人／監護人／受委人／代理人的銀行帳戶資料 (自動轉帳用)
Part 6 *Applicant's / Guardian's / Appointee's / Agent's account particulars (for auto-payment)

帳戶持有人名稱 (中文) 李式田 (英)
Account name (Chinese)
銀行名稱 Kowloon Bank
Name of bank
帳戶號碼 0 0 1 - 0 0 2 -
Account number

If a guardian/an appointee applies the allowance for the applicant, the guardian/appointee should fill in his/her/the agent's account particulars (joint account is not accepted).

第七部分 親友的個人資料 (隨意提供)
Part 7 Relative's / Friend's personal data (optional)

姓名 (中文) _____
Name in Chinese
與申請人關係 _____
Relationship with applicant
通訊地址 _____
Correspondence address
住宅電話號碼 _____ 流動電話號碼 _____
Home telephone number Mobile phone number

Provision of relative's/friend's personal data will provide an additional channel to contact the applicant when necessary.

第八部分 其他資料 (包括其他福利需要)
Part 8 Other information (including other welfare needs)

請註明
Please specify

第九部分 聲明及保證
Part 9 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／申請人離開香港、遭監禁或合法羈留, 本人將從速向社會福利署申報。
I undertake to report immediately to the Social Welfare Department any changes in the particulars contained herein. I further undertake to report immediately to the Social Welfare Department *my/the applicant's departure from Hong Kong, imprisonment or detention in legal custody.
- 本人已閱讀最後頁「收集個人資料聲明」, 並明白其內容。
I have read the "Personal Information Collection Statement" at the last page and understand its content.
- 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。
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, 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.

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

VII. Documents Required for Application

1. Please return the completed application form together with photocopies of the following supporting documents:

A. Old Age Allowance

		Old Age Allowance
1.	Any documents confirming the applicant's identity, age and residence in Hong Kong (e.g. Hong Kong Identity Card, Birth Certificate, etc.)	√
2.	Document of the applicant's bank account (e.g. first page of bank account passbook, bank statement, etc.) (must clearly show the name of the applicant and account number; only sole account is acceptable for the purpose of payment of allowance, joint account is not applicable)	√
3.	The pages showing the personal particulars in all the applicant's travel documents (e.g. Passports, HKSAR Document of Identity for Visa Purposes and the travel documents issued by other countries, etc.) and the pages showing the absence record during the one-year period immediately before the application.	√

B. Disability Allowance

		For applicants aged below 18	For applicants aged 18 or above
1.	Any documents confirming the applicant's identity, age and residence in Hong Kong [e.g. Hong Kong Identity Card, Birth Certificate, travel documents (with printed copy of e-Visa, if applicable), etc.]	√	√
2.	Document of the applicant's bank account (e.g. first page of bank account passbook, bank statement, etc.) (must clearly show the name of the applicant and account number; only sole account is acceptable for the purpose of payment of allowance, joint account is not applicable)	Not applicable	√
3.	The pages showing the personal particulars in all the applicant's travel documents (e.g. Passports, HKSAR Document of Identity for Visa Purposes and the travel documents issued by other countries, etc.) and the pages showing the absence record during the one-year period immediately before the application	√	√
4.	Applicant's hospitalisation records or follow-up appointment slips in public hospitals/clinics to facilitate the arrangement of a medical assessment	√	√
5.	The identity document of the applicant's parent/guardian and proof of relationship with the applicant (e.g. Birth Certificate)	√	Not applicable
6.	Document of bank account (e.g. first page of bank account passbook, bank statement, etc.) (must clearly show the account name and account number) of the applicant's parent/guardian (only sole and not joint accounts are acceptable for payment purposes)	√	Not applicable
7.	The identity document of the applicant's appointee/agent and proof of relationship with the applicant (e.g. Birth Certificate or Marriage Certificate, etc.)	√	√
8.	Document of bank account (e.g. first page of bank account passbook, bank statement, etc.) (must clearly show the account name and account number) of the applicant's appointee/agent (only sole and not joint accounts are acceptable for payment purposes)	√	√

C. Old Age Living Allowance

		Old Age Living Allowance
1.	Any documents confirming the applicant's identity, age and residence in Hong Kong (e.g. Hong Kong Identity Card, Birth Certificate, etc.)	√
2.	Document of the applicant's bank account (e.g. first page of bank account passbook, bank statement, etc.) (must clearly show the name of the applicant and account number; only sole account is acceptable for the purpose of payment of allowance, joint account is not applicable)	√
3.	The pages showing the personal particulars in all the applicant's travel documents (e.g. Passports, HKSAR Document of Identity for Visa Purposes and the travel documents issued by other countries, etc.) and the pages showing the absence record during the one-year period immediately before the application	√
4.	The identity document of the applicant's spouse or cohabiting partner (only applicable to an applicant whose marital status is "Married" or "Cohabiting")	√