

Student Finance Office
Working Family and Student Financial Assistance Agency
Notes on How to Complete and Return Household Application Form

2024/25

WARNING

The personal data in the application will be used to assess an applicant's eligibility for financial assistance and the appropriate level of assistance to be awarded. It is an offence to obtain property / pecuniary advantage by deception. Any person who does so commits an offence and is liable, on conviction, to imprisonment for a maximum of 10 years under the Theft Ordinance, Chapter 210.

IMPORTANT NOTES

I. General Information

- Please fill in the form clearly in black or blue ink and complete Parts I to VIII according to the instructions stated in the Household Application Form and this Notes.

II. Notes on Submission of Supporting Documents

- Regarding the copy of supporting documents required to be submitted (e.g. identity documents, supporting documents for separation / divorce (for single-parent families), documentary proof on annual income, etc.), please refer to Paragraph 9.2 of this Notes for details. Please note that applicants must provide the required supporting documents; otherwise, the Student Finance Office (SFO) will not be able to process the application.
- Please follow the instructions stated on the "Cover Sheet for Supporting Documents" [SFO 108] and submit copies of identity documents of the applicant and those of the family members (including the dependent parent(s) (if applicable)) claimed in the form together with copies of other document proof related to the application.

Completion of Household Application Form

1. Part I Particulars of the Applicant

(Applicants must be the parent or the guardian (as recognized under Guardianship of Minors Ordinance, Cap 13) of the student-applicants)

Please use block letters; write the surname starting from the first box; and leave a space between each word.

1. Name in Chinese	陳 大 文
3. Name in English	C H A N T A I M A N
4. Correspondence Address	(Please fill out in English)
Flat	A
Name of Building	H A P P Y H O U S E
Estate / Village	H A R M O N Y E S T A T E
No. & Name of Street	
District	S H A M S H U I P O
Area	# 1. HK <input type="checkbox"/> 2. KLN <input checked="" type="checkbox"/>
5. Year of Birth	1 9 7 0
Please fill in the HKID Card No. with reference to the example as shown in the box.	A 1 2 3 4 5 6 (7)
<small>(If HKID Card No. is not available, please provide Other Identity Document No. with copy of relevant proof.)</small>	
Other Identity Document Type:	<small>(Please refer to paragraph 1.1 of "Notes on How to Complete and Return Household Application Form")</small>
Other Identity Document No.:	
7. Home Tel No. @	1 2 3 4 5 6 7 8
8. HK Mobile Phone No.	1 2 3 4 5 6 7 8 <small>(The SFO will send various notifications by means of SMS. Please fill in the phone number that can receive SMS.)</small>
9. Email Address	c h a n t m @ g m a i l . c o m
10. Your marital status during the period from 1.4.2023 to 31.3.2024	
# <input checked="" type="checkbox"/> A. Married	<input type="checkbox"/> B. * Divorced / Separated / Widowed / Single / Others (Please specify : _____)
<small>(Please provide spouse's information in Part II)</small>	<small>(Please provide copies of supporting documents, and spouse's information need <u>not</u> be provided in Part II)</small>

Applicant must provide the correct correspondence address. Otherwise, the SFO will not be able to contact the applicant in writing. If the applicant can only confirm the place of residence after submitting the application, please inform the SFO the new correspondence address in writing once it is available. If the applicant is not residing in Hong Kong, please provide a Hong Kong correspondence address for future correspondence.

If the applicant is not a holder of the Hong Kong Identity Card, please provide other identity document type and number according to Paragraph 1.1 of this Notes.

To facilitate the SFO to issue acknowledgement of receipt of applications and the related payment information (if applicable) by means of SMS, please fill in the applicant's Hong Kong mobile phone number.

Please fill in the marital status during 1.4.2023 to 31.3.2024. If applicant is "Married", please put "✓" in the box next to item (A) and provide spouse's information in Part II of the application form.

If applicant is a single-parent during 1.4.2023 to 31.3.2024, please follow the example below, put "✓" in the box next to item (B) and delete the inapplicable status.

B. * Divorced / Separated / Widowed / Single / Others (Please specify : _____)

(Please provide copies of supporting documents, and spouse's information need not be provided in Part II)

11. Paper-based application form is needed in the next school year
(Note: Applicants who do not put "✓" in the box will be treated as opting for electronic application form in the next school year. To facilitate application and for environmental protection, the SFO encourages applicants to submit electronic application.)

Applicants who do not put "✓" in the box will not receive paper-based pre-filled application form from the SFO in the next school year. To facilitate submission of electronic application, the SFO will issue an Access Code for getting the pre-filled electronic application form online and other relevant information to applicants concerned by batches from around mid March 2025.

2.1.2 Applicant's spouse and children in receipt of Comprehensive Social Security Assistance (CSSA) will not be counted as 'family members' under the Adjusted Family Income (AFI) mechanism.

2.1.3 Student-applicants who have been approved to receive financial support in respect of textbook expenses, Internet access charges at home and student travel expenses including free transportation service to and from school by any public or private organizations or schools should not apply for the same type of assistance through the SFO. These organizations include, but are not limited to schools, the SWD, EDB, the Hong Kong Jockey Club, public transport companies, etc. If it is subsequently discovered that the student-applicant is benefiting from double subsidies, the applicant is liable to refund the overpaid amount forthwith upon the request of the SFO.

2.1.4 Applicant should fill in the class level attended by his / her child(ren) in 2024/25 using the following codes:

(i) Whole-day Child Care Centre (group aged 0-2)	N	1															
(ii) Whole-day Child Care Centre (group aged 2-3)	N	2															
(iii) Nursery class in kindergarten	K	1															
(iv) Lower class in kindergarten	K	2															
(v) Upper class in kindergarten	K	3															
(vi) Primary 1 to 6	P	1	/	P	2	/	P	3	/	P	4	/	P	5	/	P	6
(vii) Secondary 1 to 3	S	1	/	S	2	/	S	3									
(viii) Secondary 4 to 6	S	4	/	S	5	/	S	6									
(ix) Diploma of Applied Education/Diploma Yi Jin	Y	J															
(x) Others (e.g. Tertiary Level)	O	L															

2.1.5 If applicant wishes to amend the application details after submission of the Household Application Form (including applying for additional scheme(s) / amending scheme(s) that have been applied for), please submit the request in writing, together with justification, and post it to the SFO within 30 days from the submission date of the application form. Application for additional scheme(s) / amending the scheme(s) to apply for must be duly signed by the applicant with the application number / the HKID card number of the applicant specified. It will take longer time for processing these applications. Please note that late application for financial assistance will not be considered. In this regard, applicant should check carefully if he / she has chosen all the scheme(s) that he / she wishes to apply for before submission of the application form.

2.2 Subsidy for Internet Access Charges (SIA)

The applicant does not need to apply for SIA, which is on a household basis and only applicable to families with students of primary and secondary levels. Families will be disbursed the subsidy provided that they can pass the means test and the student-applicant(s) can meet the eligibility criteria for SIA. This subsidy is not applicable to families with pre-primary students only.

C. Subsidy for Internet Access Charges (SIA)

(On household basis and only applicable to families with students of primary and secondary levels. Not applicable to families with pre-primary students only.)

SIA will be disbursed to eligible families.

For families which **do not need** SIA, please put "✓" in the box on right-hand side.

Do not need

For families which **do not need** SIA, please put "✓" in the box provided.

2.3 Dependent parent

2.3.1 Dependent parent refers to the applicant's parents, including in-laws, who is not a recipient of the CSSA at the time of submission of application. They must, throughout the normal assessment year (1 April 2023 to 31 March 2024), not in employment and meet any one of the following conditions for at least 6 months -

- (A) resided with the applicant's family; or
- (B) resided in premises owned or rented by the applicant or his / her spouse; or
- (C) resided in an elderly home and the expenses were fully paid by the applicant or his / her spouse OR totally supported by the applicant or his / her spouse.

Remarks: Applicant or his / her spouse should continue to support their parent in the 2024/25 school year and the form of support should be similar to that in the year of assessment. Besides, as the number of family members may affect directly the level of assistance the applicant's family is eligible for, please send the completed application form together with documentary proof for supporting the parents (e.g. tenancy agreement, residential address proof or receipt of the home for the elderly, etc.) to the SFO by post.

2.3.2 If applicant or his / her spouse has dependent parent(s), please submit copies of the identity documents of the dependent parents provided in the form. Otherwise, please do not fill out this part.

Please fill in the personal particulars of dependent parent(s) and provide a copy of their identity documents (e.g. the Hong Kong Smart Identity Card) and documentary proof for supporting the parents (if applicable).

Please put "✓" in the appropriate box. If yes, please skip Part "D". If no, please continue to complete Part "D" and refer to Paragraph 2.3.1 of this Notes.

D. **Dependent Parent** (If you / your spouse have dependent parent(s), please fill out this section, otherwise do not fill out the spaces below.)

(i) Is/Are the dependent parent(s) currently in receipt of the Comprehensive Social Security Assistance (CSSA) and/or (ii) under employment during the assessment period?
 # Yes (Need not complete Part 'D') No (Continue to complete Part 'D' and refer to Paragraph 2.3 of 'Notes on How to Complete and Return Household Application Form' on the definition of 'Dependency')

Name of Dependent Parent	HKID Card No. (Please provide copy) and Year of Birth	Dependency Status (Please put "✓" in the appropriate box) at least 6 months during 1.4.2023 to 31.3.2024		
		Resided with the applicant's family	Resided in premises owned or rented by the applicant or his / her spouse	Resided in an elderly home and the expenses were fully paid by the applicant or his / her spouse OR totally supported by the applicant or his / her spouse
(1) Name in Chinese: 陳 大 福	HKID Card No.: E 1 2 3 4 5 6 (7)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(2) Name in English: C H A N T A I F U K	Other Identity Document Type: (Please refer to paragraph 1.1 of "Notes on How to Complete and Return Household Application Form")			
If the dependent parent is not a holder of the Hong Kong Identity Card, please provide other identity document type and number according to Paragraph 1.1 of this Notes.		Applicant should read Paragraph 2.3.1 (A), (B) and (C) of this Notes carefully and put "✓" in the appropriate box(es).		
	Other Identity Document No.:			
	Year of Birth: 1 9 4 6			

3. Part III Residential Address

3.1 Applicant should provide the residential address in this part so that the SFO can arrange to conduct home visits for the selected applicants. If the applicant's residential address is the same as the correspondence address provided in Part I of the application form, the applicant is not required to complete this part.

4. Part IV Family Income

Please complete the fields with position, unemployment, housewife or retirement during the assessment period. If it is not a whole year, please specify the period with reference to the examples.

Please provide the total income (integer without decimal places), for the period from 1 April 2023 to 31 March 2024. **The SFO will not accept estimated amount, and so please provide the actual figure.** For other income source, e.g. rental income (see item 11 under "Items need to be reported" in Paragraph 4.1 of this Notes), contribution from children not residing with the family / relatives / friends, alimony or interests from investments, please state the amount according to the following example.

Applicant and Family Member	Mode of employment	Position / Other (e.g. housewife, unemployed, retired) (Please specify period if it is not a whole year)	Total Annual Income (\$) (Including bonus / allowance / part-time income (excluding Mandatory Provident Fund (MPF) / Provident Fund contribution by employee))	For Office Use
① Applicant	# <input checked="" type="checkbox"/> Full-time	Unemployed (1.4.2023 – 30.4.2023)	Salary (\$) 8 0 0 0 0	
	# <input type="checkbox"/> Part-time	Clerk (1.5.2023 – 31.12.2023) Self-employed Driver (1.1.2024 – 29.2.2024) Retired (1.3.2024 – 31.3.2024)	Business profit (\$) 4 5 0 0 0	
② Spouse	# <input type="checkbox"/> Full-time	Housewife (1.4.2023 – 30.9.2023)	Salary (\$) 3 0 0 0 0	
	# <input checked="" type="checkbox"/> Part-time	Part-time Cashier (1.10.2023 – 31.3.2024)	Business profit (\$) [] [] [] [] []	
③ Unmarried child residing with the family (if applicable) Name: CHAN Tai-ming	# <input checked="" type="checkbox"/> Full-time	Waiter (1.4.2023 – 10.6.2023)	Salary (\$) 3 6 0 0 0	
	# <input type="checkbox"/> Part-time	Unemployed (1.6.2023 – 31.3.2024)	Business profit (\$) [] [] [] [] []	
④ Unmarried child residing with the family (if applicable) Name: [] [] [] [] []	# <input type="checkbox"/> Full-time		Salary (\$) [] [] [] [] []	
	# <input type="checkbox"/> Part-time		Business profit (\$) [] [] [] [] []	
⑤ Other income (if applicable)	Contribution from children not residing together, relatives or friends (\$)		Interests from investments, fixed deposit (\$)	
	Rental income of property, land, carpark, vehicle or vessel (\$)		Alimony (\$)	
	Pension (excluding lump sum retirement gratuity) (\$)		Others (\$)	
	Widow's & Children's Compensation (\$)			
Total =			304000	

The total amount is for reference only. The SFO will assess the eligibility of a family for student financial assistance and its assistance level according to the AFI mechanism stated in Paragraph 3 of the Guidance Notes.

- 4.1 Types of incomes earned by the family both within and outside Hong Kong that should be reported are listed below for reference. For provision of documentary proofs, please refer to Paragraph 9.2 (vi) of this Notes.

Items need to be reported		Items need not to be reported	
1	Salary (including the salary of applicant, applicant's spouse and student-applicant's unmarried sibling(s) residing with the applicant for full-time, part-time or temporary jobs, <u>excluding Mandatory Provident Fund (MPF) / Provident Fund contribution by employee</u>)	1	Financial assistance from the Government, or payment from the assistance programme under the Community Care Fund (such as CSSA / Old age allowance / Old age living allowance / Disability allowance / Retraining allowance / Work Incentive Transport Subsidy / Working Family Allowance etc.)
2	Double pay / Leave pay	2	Long service pay / Contract gratuity
3	Allowance (including overtime work / living / housing or rent / transport / meals / education / shift allowance, etc.)	3	Severance pay
4	Bonus / Commission / Tips	4	Loans
5	Studentship	5	Lump sum retirement gratuity / Provident fund
6	Wages in lieu of notice of dismissal	6	Inheritance
7	Business profits and other income earned by means of self-employment, such as hawking, driving taxis / minibuses / lorries, and fees for services rendered, etc.	7	Charity donations
8	Alimony	8	Insurance / accident / injury indemnity
9	Contribution from any person(s) not residing with applicant's family to any of the applicant's family member(s) (including money or contribution of housing / remittance(s) / contribution for mortgage repayment / rent / water / electricity / gas or other living expenses)	9	MPF / Provident Fund contribution by employee (the <u>ceiling</u> of contribution needs not to be reported is <u>\$18,000 per year</u>)
10	Interests from fixed deposits, stocks, shares and bonds, etc.		
11	Rental income of property, land, carpark, vehicle or vessel (including Hong Kong, the Mainland and overseas)		
12	Monthly pension / Widow's & Children's Compensation		

- 4.2 Applicant should provide the income proof and those of the family member(s) under employment. If the applicant, the applicant's spouse or any family member under employment has / have provided the Income Certificate (i.e. Sample I) or the Self-prepared Income Breakdown (i.e. Sample IV) as the income proof, the SFO may still require the applicant to concurrently provide the bank passbook, salary statement or other income proof for reference. If applicant cannot provide any income proof for special reasons, please notify the SFO in writing, providing justifiable reasons and the detailed calculation of income. Applicant should also sign on the explanatory letter personally. If the explanation or documents provided cannot substantiate the reported income information of the family member(s) concerned (e.g. self-written statement of income), the SFO may need to make adjustment and apply benchmark figures (based on statistical information provided by relevant government departments e.g. Census and Statistics Department) to assess the income of applicants and their family members. In assessing the family income, if necessary, the SFO may require the applicants to provide documentary proof of items which is not listed above or seek further clarification for amounts that were used for maintaining the living of the family but have not been accounted for in the application such as savings, loans. The SFO may also request the applicant to produce documentary proof including bank savings records, duly signed declaration from the debtor, etc. In case no valid proof is provided, the amounts for maintaining the living of the family may be taken as part of the family income.

5. Part V Medical Expenses Incurred by Family Member(s) with Chronic Illness

(Please provide a copy of supporting document)

Name	Nature of incapacity or chronic illness	Medical expenses incurred within the assessment period (\$)
CHAN Tai-fuk	Suffering from diabetes and requiring regular medical treatment.	1 0 4 0 0

- 5.1 If applicant has incurred medical expenses for family members (for family members who are chronically ill or permanently incapacitated) during the period from 1 April 2023 to 31 March 2024, he / she may state details of the situation in Part V of the application form. Applicant must provide relevant medical certificate(s) and receipt(s) issued by the hospitals / clinics / registered practitioners to the SFO for consideration of deducting such expenses. (The ceiling of deductible amount for each family member is \$23,310 per year in 2024/25).

9.2 Required supporting documents include:

- (i) **Copy of identity documents** of the applicant and his / her family members (including the dependent parent(s) (if applicable)) as listed in Part II (Note 1);
- (ii) (For **single-parent families**) Copy of supporting documents for separation / divorce or spouse's Death Certificate. If applicants are unable to provide the supporting documents, please explain in writing the reasons and sign on an explanatory note; if applicant is unable to provide the required supporting documents, the SFO reserves the right to process the application on the basis that the applicant is not treated as a single parent;
- (iii) (If applicable) Copy of **documentary proof on supporting the dependent parents**;
- (iv) (If applicable) Copy of documentary proof on unavoidable **medical expenses** (for family members who are chronically ill or permanently incapacitated) for the period from 1 April 2023 to 31 March 2024;
- (v) Please provide copy of the **bank statement / first page of bank book** (Note 2); and
- (vi) **Documentary proof on total income** for the period from 1 April 2023 to 31 March 2024. Please submit the document in accordance with the requirements listed below:

Salaried employed person	<ul style="list-style-type: none"> (1) Tax Demand Note issued by the Inland Revenue Department; if not available (2) Employer's Return of Remuneration and Pensions Form; if not available (3) Salary Statement; if not available (4) Bank transaction record showing payment of salary, allowance, etc. (together with the page showing the name of bank account holder) (Please highlight the entries with colour and remarks. For any entries other than income, please also make necessary remarks next to them, or else the SFO may include the amount in calculating family income); if not available (5) Income Certificate certified by the employer (See Sample I), etc.
Self-employed driver or person running business (including sole proprietorship business / partnership business / limited company)	<ul style="list-style-type: none"> (1) Profit and Loss Account verified by a Certified Public Accountant; if not available (2) Profit and Loss Account prepared on your own (See Sample II or III) <u>and</u> (3) Personal Assessment Notice (if applicable).
Salaried employed or self-employed person who cannot produce any income proofs	Please follow Sample IV to provide Self-prepared Income Breakdown detailing your monthly income throughout the year and explaining why income proof cannot be produced. (The SFO reserves the right to decide whether applications from those applicants who cannot provide justification for not producing income proof would be accepted.)
Person with rental income	<ul style="list-style-type: none"> (1) Tenancy Agreement ; if not available (2) Bank transaction record showing rental income (together with the page showing the name of bank account holder) (Please highlight the entries with colour and remarks. For any entries other than income, please also make necessary remarks next to them, or else the SFO may include the amount in calculating family income).

Note 1: If applicant / family member(s) meet the following requirements, it is not required to submit the supporting document(s):

- Applicants / the family members has / have a successful application under the financial assistance scheme of the SFO and has / have submitted a copy of their HKID Card in the above successful application; and
- There is no change in personal particulars on the HKID Card.

Note 2: **If applicant meets the following requirements, it is not required to submit the supporting document:**

- Applicant has a successful application under the financial assistance scheme of the Working Family and Student Financial Assistance Agency and was disbursed with payment of grant and / or loan to his / her bank account while the applicant has submitted a copy of bank account proof in the above successful application; and
- Applicant uses the same bank account in the application for the 2024/25 school year (i.e. the above bank account which has been disbursed with grant and / or loan).

Regarding to the above exemption mentioned in Notes 1 and 2, applicant must write correctly and clearly the information of the Identity Card and bank account number on the Application Form. If necessary, the applicant may still be required to resubmit the relevant document(s). In case of any disputes, the decision of the SFO will be final.

Enquiries

10.1 For enquiries relating to the completion and submission of household application form, please call our 24-hour enquiry hotline at 2802 2345.