

## Eligibility criteria of OALA include:

- must be aged 65 or above;
- must have been a Hong Kong resident for at least seven years and 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 56 days during the one-year period is treated as residence in Hong Kong);
- must have income and assets not exceeding the following prescribed limits:

	Single person	Married couple
Total income per month	\$6,880	\$10,940
Total assets value	\$193,000	\$292,000

"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; and net income on rentals collected. Contributions from family members, relatives or friends, and monthly payments received under reverse mortgage schemes are excluded, but any unspent and accumulated amount of savings/cash in hand generated will be treated as "assets".

"Assets" (1) include land and non-owner occupied properties(2), cash in hand, bank savings, investments in shares and stocks (including bonds, trust funds and accrued retirement benefits(3)), vehicle for investment (e.g. taxi and public light bus) and its business licence, and gold bars and gold coins, etc. Owner occupied property, columbarium niche for self-use in future, and the cash value of insurance schemes are excluded.

- (1) Including those in Hong Kong, Macau, the Mainland or overseas.
- (2) Only the value of one residential property which is the principal place of residence in Hong Kong is disregarded. Other properties separately or jointly owned by the applicant and/or his spouse are regarded as "non-owner occupied properties" and should be taken into account for assessment of "assets".
- (3) 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.

- must not be in receipt of Old Age Allowance, Disability Allowance or Comprehensive Social Security Assistance.

For details and other eligibility criteria, please refer to Social Security Allowance Scheme (SWD's website: [www.swd.gov.hk](http://www.swd.gov.hk)).



February 2013

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## Old Age Living Allowance

Auto-conversion / Postal Submission / New Application Arrangements

### Introduction

The Social Welfare Department (SWD) is to launch an Old Age Living Allowance (OALA) under the Social Security Allowance Scheme commencing April 2013. It aims to provide a cash allowance of \$2,200 per month as an additional form of financial assistance for needy Hong Kong residents aged 65 or above to supplement their living expenses.



## Auto-conversion / Postal Submission / New Application arrangements

Different types of elderly persons can receive OALA through different arrangements:

### Phase 1 - Auto-conversion

Elderly persons aged 65 to 69 currently receiving Normal Old Age Allowance (OAA), or elderly persons aged 70 or above currently receiving Higher OAA and having received Normal OAA between the ages of 65 and 69

SWD will issue a green notification letter to them on 25 February 2013 enclosing the **Old Age Living Allowance Reply Slip** to inform about the auto-conversion arrangement.

Those who opt to switch to OALA and have income and assets not exceeding the prescribed limits (please see page 4 for details) need not reply, nor do they need to make separate applications. They will automatically be converted to receive OALA, and payment will be credited into their designated bank accounts currently used for receiving OAA payment in April 2013.

Those who opt not to switch to OALA or have income and/or assets exceeding the prescribed limits should complete the **Old Age Living Allowance Reply Slip** and return it to SWD on or before 22 March 2013.

### Phase 2 - Postal Submission

Elderly persons aged 70 or above currently receiving Higher OAA and not having received Normal OAA between the ages of 65 and 69, or elderly persons aged 65 or above currently receiving Normal Disability Allowance (DA)

SWD will issue a yellow notification letter to them on 25 March 2013 enclosing the **Postal Submission Application Form** to inform about the arrangement to apply for OALA by post.

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Those who opt for OALA can submit their applications by post to SWD on or before 31 December 2013, and they need not approach SWD's social security field units direct for application. Upon receipt of the **Postal Submission Application Form**, SWD will verify their eligibility as soon as possible. For those eligible, payment will be credited into their designated bank accounts currently used for receiving OAA/Normal DA payment.

### Phase 3 - New Application

Elderly persons aged 65 or above currently not receiving OAA or Normal DA but in need of OALA, and meeting the eligibility criteria including residence requirements and income and assets requirements of OALA (please see page 4 for details)

They can apply for OALA by fax, by email, by post or through referral by government departments/non-governmental organizations, etc., or go to SWD's social security field units near their places of residence. Application forms and guidance notes can be downloaded from SWD's website and are available at social security field units.

SWD will receive new applications with effect from 2 April 2013.

### Notes

(1) Retrospective payment from 1 December 2012 at the earliest will be made to eligible elderly persons through the auto-conversion arrangement, or for applications received on or before 31 December 2013. For applications received after 31 December 2013, eligible applicants will only be entitled to receive the OALA payments from the date of eligibility.

(2) Those elderly persons aged 70 or above with income and/or assets exceeding the prescribed limits or opting not to switch to OALA can apply for/continue to receive Higher OAA of \$1,135 per month.

### Enquiries

For enquiries about OALA, please call the enquiry hotline or visit our website.

Hotline : 3595 0130  
Website : [www.swd.gov.hk/oala](http://www.swd.gov.hk/oala)

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