Appendix 2

List of documents to be submitted for application (Both originals and photocopies)

I. Proof of identity of patient / applicant (HKID Card / Passport / Travel document)
II. Proof of identity of all family members living under the same roof who have been included in financial assessment
III. Documents for financial assessment

(a) **Proof of household income** from the patient and all family members living under the same roof who have been included in financial assessment

- Employed persons:
  Bank passbooks, bank statements, salary statement, documents issued by employers for proving their income, Mandatory Provident Fund (MPF) Scheme pay records, tax return statement or the notice of assessment, and other documentary proof of income (e.g. allowance / commission / part-time income/ monthly pension, etc.) for the at least past 6 months

- Self-employed / business operators:
  Profit & Loss Account, Tax return statement, income declaration, other proof of income

- Unemployed persons:
  Documentary proof of unemployment (e.g. termination letter, notification by an employer to an employee who is about to cease to be employed, medical proof, proof of enrollment in a full-time programme for study, proof of looking for jobs, etc.)

- Other income:
  Contribution (e.g. family / living expenses given / fees paid for family member by relative(s) and friend(s) not residing with the family), maintenance payments, rental income from e.g. property / land / carpark / vehicle / vessel, the regular payout provided under the annuity scheme / insurance policy (regardless of whether the monthly payout could be withdrawn), etc.

(b) **Proof of household capital asset** held or owned by patient and all family members living under the same roof who have been included in financial assessment, including all assets under their names regardless of being individually or jointly held, in or outside Hong Kong

- Bank passbooks, bank statements, bank record of active / inactive / closed accounts for the at least past 6 months relating to all the individual and joint accounts[1] including saving deposit, time deposit, club deposits, foreign currency deposit, investment account, shares and securities services account, current account, integrated account, Jockey Club betting account, etc.;
- Documentary proof of Self-employed / business operators, e.g. Business Registration Certificate, balance sheet, company account statements, etc.;
- Documentary proof of annuity scheme / insurance policies with investment or saving element (e.g. investment-linked insurance policies, life insurance and annuity scheme), such as monthly statement or annual report;
- Documentary evidence of stock, shares, warrants, funds, bonds and other investments owned;
- Documents proof of the ownership of the properties (including properties under reverse mortgage) / land / parking spaces, e.g. Demand Notes for Rates, Demand Notes for Government Rent, mortgage repayment schedule, etc.;
- Screenshot of e-wallet account no., transaction records for the past 6 months and balance (e.g. PayMe / Alipay HK / We Chat Pay)
- Asset held in trust of others / Asset entrusted to others / Other assets (e.g. cheques in transit)

(c) **Proof of allowable deductions** (patient and all family members living under the same roof who have been included in financial assessment) (for the past 6 months, except those items with specific period)

- Monthly statement on mortgage, monthly rental statement, Demand notes for rates and /or Government rent, receipt of management fee
- Records on contribution to pension/retirement scheme/provident fund
- Record of child care expenses incurred
- Documentary proof of school fees of children (up to age 25) in the household who are at tertiary level or below; the notification letter issued by Student Finance Office for the subsidy amount under the Financial Assistance Scheme for Post-secondary Students (FASP) / Tertiary Student Finance Scheme - Publicly-funded Programmes (TSFS)
- Relevant maintenance order by Court and the transferal records for the maintenance paid
- Tax return statement or the notice of assessment of last 12 months
- Records on medical receipts of public hospitals/clinics of last 12 months

[1] In general, the balance in the joint account is equally divided among the account holders, unless documentary proof is provided on the division of assets.

Note:

1. For household and core family member definitions, please refer to the relevant paragraphs the part on “Financial Assessment”.
2. Medical Social Workers will make reference to the information on financial condition of the at least past 6 months of patient and core family members living together to assess the eligibility of medical assistance. The documents listed above only serve as reference. Medical Social Workers may request for relevant documents other than those listed above, make enquiries on transactions such as purpose of individual withdrawal / deposit and detail of income / expenditure record, and/or contact the patient’s family member(s) for clarification and verification of information when necessary in order to assess the financial condition of patient’s family.
3. During the application process, MSW will request patient / applicant to re-submit all up-to-date information if the supporting document(s) provided is not up-to-date, or the information submitted are required to be updated.
4. If the applicant authorized by patient for handling the application could not present original copy of identity document(s) of the patient / core family members living together, Medical Social Workers may consider to accept the copy of identity document(s) for application purpose, except situations where the original copy of identity document(s) of the patient /core family members living together must be provided for verification of identity with other Department during the application.
5. As application processing takes time, in general, the patient / applicant should submit a completed application form and provide all the required information two weeks prior to the treatment commencement date to allow sufficient time for processing and approval. If the patient / applicant fails to submit the completed application form and provide all the necessary information within 30 calendar days from the date of referral by attending doctor / healthcare professional, the application will be automatically cancelled.