

HKCCCU Logos Academy

School Year 2014-2015

Guidance Notes on Application Form for Assessment of Eligibility Fee Remission

This Fee Remission Scheme aims to provide 100% (full rate) or 50% (half rate) of school fee assistance for needy families.

1. An Application and Handling Procedures

- As parents, if you would like to apply for fee remission under the Fee Remission Scheme, you are required to get an application form at the General Office, or download the form from the school web-site www.logosacademy.edu.hk/frameset02.htm. Each student needs to submit one application.
- Please submit the completed application forms to the General Office as soon as possible.
- For parents who can pass the means test, they need to bring along all relevant documents during an interview with staff of the school.
- Our school will notify parents of the results as soon as possible.

2. The Means Test and Levels of Fee Assistance

- Our school will use the “Adjusted Family Income” (AFI) mechanism as a means test to assess the eligibility of a family for student financial assistance and its assistance level. The AFI mechanism is based on the following formula:

$$\text{AFI} = \frac{\text{Gross annual income of the family}}{\text{Number of family member} + (1)}$$

- Gross annual income of the family includes the annual income of applicant and his/her spouse; 30% of the annual income of unmarried child/children residing with the family if applicable; and the contribution from relatives/friends if applicable.
- The members of a family normally refer to the applicant, his/her spouse, unmarried child/children residing with the family and the dependent parent(s) who are supported by the applicant and/or his/her spouse.
- Dependent parent(s) should be resided with you / your spouse, without paying full cost, for a continuous period of not less than 6 months or have received from you / your spouse not less than \$12,000 in money towards his / her maintenance.
- For single-parent families of 2 to 3 members, the ‘plus 1 factor’ in the divisor of AFI formula will be increased to 2.
- This mechanism will calculate whether the applicant meet the eligibility and the Level of Fee Assistance (Full or Half rate). The calculation of the (AFI) are as follows:

For example: A family of 4 members includes the applicant, his/her spouse, unmarried child/children residing with the family and a daughter studying in secondary school.

a) Annual income of the applicant	\$120,000
b) Annual income of his/her spouse's	\$ 98,000
c) Annual income of unmarried child/children residing with the family	\$ 72,000
d) The contribution from relatives/friends	\$ 10,000

$$AFI = (\$120,000 + \$98,000 + \$72,000 \times 30\% + \$10,000) \div (4 + 1) = \$49,920$$

- The AFI eligibility benchmarks for various levels of assistance in the 2014 / 15 school years are listed in the table below.

AFI Groups between (HK\$)	Level of Fee Assistance
\$0 - \$50,000	Full
\$50,001 - \$80,000	Half
> \$80,000	Ineligible

The school will base on the date of application to determine the Fee Remission period.

- * Applicants should provide proofs of income and those of the family member(s) under employment, and such include income earned by the family both within and outside Hong Kong. If applicants cannot provide any income proofs for special reasons, please notify our school in writing, providing justifiable reasons and the detailed calculation of income. Applicants should also sign on the explanatory letter. Our school may also make adjustments 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, our school may require the applicants to seek further clarification for amounts that are used for maintaining the living of family but have not been accounted for in the application such as savings, loans. Our school 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.

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 4

1. Salary (including the salary of applicant, spouse and unmarried child residing with the family for full-time, part-time or temporary job, Provident Fund and Mandatory Provident Fund)
2. Double pay / Leave pay
3. Allowance (including housing / travel / meals / education / shift allowance, etc.)
4. Bonus / Commission / Tips
5. Wages in lieu of notice of dismissal
6. Profit from business / investment
7. Alimony
8. Contribution from children not residing with the family / relatives / friends (including money or contribution of housing / water / electricity / gas or other living expenses)
9. Interests from fixed deposits, stocks, shares & bonds, etc.
10. Rental income
11. Monthly pension / Widow's & Children's Compensation

3. Provision / Handling of Personal Data

- It is the responsibility of applicants to complete the application form fully and truthfully and to provide all supporting documents. Our school will assess the eligibility for and the level of assistance to be granted based on the information provided by the applicants. **Insufficient information / misrepresentation of facts / providing false and misleading information will render the application processing deferred, or application disqualified for further processing.**
- The personal data provided in the application and any supplementary information provided on the request of our school will be used by our school for the following purposes:
 - ※ Activities related to the processing and authentication of application against other database of our school and the database of other relevant government bureaux /departments in association with the student financial assistance received by the applicant / applicant's family members to prevent double subsidies;
 - ※ Activities related to the recovery of overpayments, if any;
 - ※ Activities related to the matching of the personal data of the applicant and applicant's family members with other database of the SFAA and the database of SWD in association with processing of the application, the granting of other student financial assistance by the SFAA and SWD to prevent double subsidies and detect fraudulence;
 - ※ Statistics and research purposes; and
 - ※ Processing of applicants for award of other student financial assistance administered by the SFAA, the EDB, the HKEAA, other relevant government departments / organizations concerned.

The personal data of the applicant and those of his / her family members provided by the applicant may be disclosed to government bureaux / departments / organization and the schools / institutions concerned for the purposes stated in above; or where the applicant has given consent to such disclosure; or where such disclosure is authorized or required by law.

- If necessary, our school will contact other government departments and organizations, including the employers of the applicant and his / her family members, to authenticate the information provided in the application. **Any misrepresentation and concealment of facts will lead to disqualification, restitution in full of the assistance granted and possible prosecution.**
- If there is overpayment due to errors of calculation or assessment, applicants are liable to refund the overpaid amount.
- **All documents submitted are not returnable.** However, in accordance with Sections 18 and 22 and Principle 6 of Schedule 1 of the Personal Data (Privacy) Ordinance (Chapter 486 of the Laws of the Hong Kong Special Administrative Region), an applicant has the right to obtain access and make corrections to the data provided by him / her. He / she can also obtain copies of his / her personal data subject to the payment of necessary administrative charges. Such request should be addressed to our school.
- If applicants are dissatisfied with the results of their assessment, they may apply in writing to our school for re-assessment within one week from the issue date of the notification of results.

4. Notes on Submission of Application Form and Supporting Documents

- Please submit the completed “ Application Form for Assessment of Eligibility Fee Remission” to the General Office as soon as possible
- Required supporting documents include:
 - ※ Copy of identity documents of the applicant and his / her family members
 - ※ (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; and
 - ※ (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 2013 to 31 March 2014. and
 - ※ Documentary proof on total income for the period from 1 April 2013 to 31 March 2014. Please submit the document in accordance with the requirements listed below:

Salaried employed person	(1) Tax Demand Note issued by 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 records showing payment of salary, allowance, etc. (together with the page showing the name of bank account holder)(Please highlight the entries with color and remarks); if not available (5) Income Certificate certified by the employer (See Sample I at Annex), etc.
Self-employed driver or person running business (including sole proprietorship business / partnership business / limited company)	Profit and Loss Account prepared on your own (See Sample II or III at Annex) <u>and</u> Personal Assessment Notice (if applicable).
Salaried employed or self-employed person who cannot produce any income proofs	Please follow Sample IV at Annex to provide Self-prepared Income Breakdown detailing the monthly income throughout the year and explaining why income proof cannot be produced. (Our school reserves the right to decide whether applications from those applicants who cannot provide justification for not producing income proof would be accepted.)
Landlord with rental income	(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 color and remarks.)

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,

Sample I: Income Certificate
(Can be filled in directly)

INCOME CERTIFICATE

This is to certify that _____ (HKID Card No. _____) is employed by this company as _____. His / Her total salary (including allowance, bonus, double pay, leave pay and other income, in actual figure) during the period from 1 April 2013 to 31 March 2014 (please specify the exact employment period within the above-mentioned period if it was less than 12 months: _____ to _____) is *HK\$_____.

Signature of Employer : _____ Name of Employer : _____

Company Chop : _____ Telephone No.: _____

Company Address : _____

Date : _____

(Note: The original copy of this Certificate must bear the company chop and telephone number of the employer. Employer's initials are required against any deletion / amendments.)

* Please specify the currency if salary paid is not in Hong Kong dollars.

INCOME CERTIFICATE

This is to certify that _____ (HKID Card No. _____) is employed by this company as _____. His / Her total salary (including allowance, bonus, double pay, leave pay and other income, in actual figure) during the period from 1 April 2013 to 31 March 2014 (please specify the exact employment period within the above-mentioned period if it was less than 12 months: _____ to _____) is *HK\$_____.

Signature of Employer : _____ Name of Employer : _____

Company Chop : _____ Telephone No.: _____

Company Address : _____

Date : _____

(Note: The original copy of this Certificate must bear the company chop and telephone number of the employer. Employer's initials are required against any deletion / amendments..)

* Please specify the currency if salary paid is not in Hong Kong dollars.

WARNING: The personal data given in this statement should be true and complete. Any person who obtains property / pecuniary advantage by deception is liable on conviction to imprisonment for a maximum of 10 years under the Theft Ordinance, Chapter 210.

Sample II: Profit & Loss Account
(For self-employed taxi driver / lorry driver /
minibus driver)
(Can be filled in directly)

Name of family member engaged in the following business	:	_____
Taxi driver / Lorry driver / Minibus driver (please circle)		_____
Vehicle owner / Vehicle lessee (please circle)		_____
License number (for vehicle owners only)	:	_____
<u>Profit and Loss Account</u> (From 1 April 2013 to 31 March 2014)		
<u>Income (HK\$)</u>		
1. Rent (for vehicle owner only)	\$	_____
2. Profit from operating business	\$	_____
3. Others (please specify all items & breakdown of amounts)	\$	_____
(A) Total Income	\$	_____
<u>Expenditure (excluding vehicle mortgages) (HK\$)</u> (1 & 2 are applicable to vehicle lessee, 2 to 5 are applicable to vehicle owner)		
1. Vehicle rental fee	\$	_____
2. Fuel charges	\$	_____
3. Insurance premium	\$	_____
4. Maintenance fee	\$	_____
5. License fees	\$	_____
6. Others (please specify all items & breakdown of amounts)	\$	_____
(B) Total Expenditure	\$	_____
Net profit [(A) Total Income - (B) Total expenditure]	\$	_____
(This amount should be filled in Part III of Application Form for Fee Remission)		
Remark (reason for not being able to provide income proof)		
: _____		

Signature of family member engaged in the above business (if not the applicant)		

Applicant Name	:	_____
Applicant HKID No	:	_____
Applicant Signature	:	_____
Date	:	_____

Sample III: Profit & Loss Account
(For person running business (including sole proprietorship /
partnership business))
(Can be filled in directly)

Name of family member Running the following company (Owner)	:	_____
Company name	:	_____
Nature of business	:	_____
Company address	:	_____
Sole proprietorship or partnership	:	_____ (%)
(if it is a partnership, please specify the profit sharing ratio, e.g. Partnership (50%))		
<u>Profit and Loss Account</u> (From 1 April 2013 to 31 March 2014)		
(A) Gross Income (HK\$)	\$	_____
Expenditure (HK\$)		_____
(The following is the running cost of the company and should not cover any household expenses.)		
Cost on purchasing merchandise	\$	_____
Water charges	\$	_____
Electricity charges	\$	_____
Gas charges	\$	_____
Telephone charges	\$	_____
Rent and rates	\$	_____
Salary of employees other than those marked	\$	_____
Transportation costs	\$	_____
Traveling expenses	\$	_____
Insurance premium	\$	_____
Fees for repair and maintenance of machinery	\$	_____
Others (please specify all items & Breakdown	\$	_____
Other Expenditure (HK\$)		_____
# Salary of owner paid by this company	\$	_____
# Salary of other family member paid by this company	\$	_____
# Name : (_____)		
(B) Total Expenditure (HK\$)	\$	_____
Household Income = (A) Gross Income - (B) Total Expenditure* + Salary of owner / other family member paid by this company#		
= HK\$ _____		
(This amount should be filled in Part III of Application Form for Fee Remission)		
*If Gross Income is less than Total Expenditure (i.e.(A) - (B) < 0) , deficit will not be counted i.e. business loss cannot be deducted from the gross household income.		
Remark (reason for not being able to provided income proof):		

Owner Signature (if not the applicant)		

Applicant Name		

Applicant HKID No		

Applicant Signature		

Date		

WARNING: The personal data given in this statement should be true and complete. Any person who obtains property / pecuniary advantage by deception is liable on conviction to imprisonment for a maximum of 10 years under the Theft Ordinance, Chapter 210.

Sample IV: Self-prepared Income Breakdown
 (For hawker / construction worker / renovation worker / casual worker / cleaner
 who cannot provide income proof)
 (Please fill in all of the following items)
 (Can be filled in directly)

Name of the family member engaged in the following business _____ : _____
 (Each self-prepared income breakdown should contain the income information of ONE family member only.)

The relationship between this family member and the applicant : #Applicant / Spouse / Child
 (# please circle as appropriate)

Nature of Industry (e.g. Construction) _____ : _____
 Position (e.g. construction worker) _____ : _____

Actual Income

(Please fill in actual figure. If you do not have any income in a specific month, please fill in \$0. Do not leave any month blank. In addition, for payment made in arrears, for instance, if the payment date of your salary for April is in May, you should fill in the salary amount of April, etc.)

Year 2013

Year 2014

April : <u>HK\$</u>	September : <u>HK\$</u>	January : <u>HK\$</u>
May : <u>HK\$</u>	October: <u>HK\$</u>	February : <u>HK\$</u>
June : <u>HK\$</u>	November: <u>HK\$</u>	March : <u>HK\$</u>
July : <u>HK\$</u>	December: <u>HK\$</u>	
August : <u>HK\$</u>		

Total Annual Income HK\$ _____

Payment method (Please circle the appropriate item. More than one item may be selected)

- A By Cash / Cash cheque
- B By Cheque / direct credit (Please provide a copy of the transaction record together with the page showing the name of the bank account holder, circle the entries and highlight the total amount with colour for verification. For any entries other than income, please also make necessary remarks next to them, or else our school may include the amount in calculating your family income.)

Reason for not being able to provide income proof (Please circle the appropriate box.)

- A I have no fixed employer.
- B The company I worked for has wound up and I cannot obtain documentary proof from the ex-employer and do not have any other income proof.
- C Others, please specify : _____

Declaration: I declare that the above information is true and complete.

Signature of family member engaged in the above business(if not the applicant): _____

Applicant Name : _____ Applicant HKID No: _____

Applicant Signature : _____ Date : _____