



強制性公積金計劃管理局  
MANDATORY PROVIDENT FUND  
SCHEMES AUTHORITY

電話號碼 Tel No : 2918 0102  
傳真號碼 Fax No : 2259 8808  
電郵地址 Email : ORSOschemeMPFA@mpfa.org.hk  
本局檔號 Our Ref : MPFA/S/IO-O/58/1  
來函檔號 Your Ref :

**By Email**

30 March 2017

**Circular Letter: SU/COT/2017/002**

**To: Representative/Relevant Employers of ORSO Schemes and Administrators of ORSO Registered Schemes**

Dear Sirs,

**Occupational Retirement Schemes Ordinance (“Ordinance”)  
Mandatory Provident Fund Schemes (Exemption) Regulation (“Exemption Regulation”)  
Performance pledges and other ORSO scheme administration matters**

Further to our circular letter dated 17 February 2016, we write to remind you that, with effect from 1 April 2017, the Authority will send payment advices and official receipts by email only and will discontinue the issuing of various reminders to employers/administrators. The reminders to employers/administrators concern the submission of the following documents required under the Ordinance:

- (a) Compliance Certificate and Membership Statement for ORSO exempted scheme (section 10);
- (b) Annual Return for ORSO registered scheme (section 30); and
- (c) Actuarial Certificate for defined benefit ORSO registered scheme (section 31)

Employers who have not provided their email addresses to MPFA will not receive payment advices and official receipts. The opportunity is also taken to remind you that emails from MPFA should not be treated as spam to avoid any unsuccessful delivery of correspondences from MPFA by email.

## **Performance Pledges**

Consequential to the abovementioned arrangement of sending payment advices and official receipts to employers by email commencing 1 April 2017, our performance pledges are being revised. Please find attached a copy of the new leaflet on pledged service standards which supersedes the version issued in February 2014. These new service standards will come into effect on 1 April 2017.

As employers / trustees / administrators of ORSO schemes, your attention is also drawn to the following aspects of the operation of these schemes and you are reminded to adhere to these legislative requirements.

## **Notification of Changes**

Pursuant to Section 10, 21A, 22 and 67 of the Ordinance, relevant/representative employers/administrators are required to notify MPFA on various types of changes within one month of the change in respect of an ORSO scheme, in particular the change of relevant employer and change of scheme administrator. Failure to comply with such requirements commits an offence and is liable on summary conviction to a fine at \$2,000/\$10,000.

Employers and scheme administrators can easily ascertain the record of relevant/representative employers and scheme administrator by checking the “ORSO Schemes Register” of MPFA at the following link:

[http://www.mpfa.org.hk/eng/public\\_registers/orso\\_schemes/orsearch.do](http://www.mpfa.org.hk/eng/public_registers/orso_schemes/orsearch.do)


## **Annual Return**

Pursuant to Section 30 of the Ordinance and Section 10 of Schedule 2 to the Exemption Regulation, the designated person/trustee shall send to MPFA annual return of ORSO schemes containing information as specified by MPFA.

In respect of an ORSO registered scheme with more than one relevant employer, designated persons/trustees are reminded to ensure Section IV (Form ORS-4) / Section V (Form MPF(ORSO) – AR) of the Annual Return covers all relevant employers participated under an ORSO scheme, regardless of whether any particular relevant employer have/does not have any member or contribution made during the relevant financial year of the scheme.

If you have any questions in relation to the matters mentioned in this letter, please do not hesitate to contact your case officer of ORSO Schemes Section or the hotline of MPFA at 29180102.

Yours faithfully,



Susanna Lee  
Senior Manager  
ORSO Schemes Section  
Supervision Division

Encl.



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## PERFORMANCE PLEDGES FOR ORSO SCHEMES

We pledge at least 95% achievement of the service standards listed in the following table.

	Service	Service Standard	Applicable Schemes
(1)	Process applications by trustees/administrators or employers for registration/exemption of ORSO schemes	Complete processing of applications within 20 working days after receipt of all required information and documents.	Both MPF - exempt and non MPF - exempt
(2)	Process applications by the public for search on the register of ORSO registered/exempted schemes	<ul style="list-style-type: none"> <li>• Provide copy of an entry in the register within 1 service hour upon receipt of application.(Note)</li> <li>• Provide certified copy of an entry in the register within 1 service hour upon receipt of application.(Note)</li> </ul>	Both MPF - exempt and non MPF - exempt
(3)	Process applications by trustees/administrators or employers for cessation of application of pooling agreements to ORSO registered schemes	Complete processing of applications within 10 working days after receipt of a written confirmation from trustee/administrators on date of cessation.	Both MPF - exempt and non MPF - exempt
(4)	Process applications by trustees for MPF exemption of relevant ORSO Registered Schemes (S.14 and 16 of the MPFS (Exemption) Regulation)	Complete processing of applications within 12 working days after registration of ORSO scheme and receipt of all required information and documents.	Only MPF - exempt
(5)	Process applications by trustees or employers for change of trustee or director of trustee	Complete processing of applications within 10 working days after receipt of all required information and documents (including vetting results).	Only MPF - exempt
(6)	Process applications by employers for withdrawal of MPF exemption certificates	Complete processing of applications within 10 working days after receipt of all required information and documents.	Only MPF - exempt
(7)	Process notifications of changes by trustees/administrators or employers on names and addresses of employers, administrators, designated persons or trustees	Complete processing of notifications within 10 working days after receipt of all required information and documents.	Both MPF - exempt and non MPF - exempt
(8)	Issue e-Payment Advice* to remind employers who has provided email address on periodic fee payment	Issue e-Payment Advice 1 month before the periodic fee due date.	Both MPF - exempt and non MPF - exempt
(9)	Issue e-Official Receipt* to employers who has provided email address to acknowledge receipt of periodic fee payment by employers	Issue e-Official Receipt within 8 working days after clearance of cheques received.	Both MPF - exempt and non MPF - exempt

Note: Service hour is Monday to Friday from 8:45 am to 1pm and 2pm to 5:45pm.

\* Payment Advice and Official Receipt sent by email