

Brief Descriptions of the 28 Revised Guidelines

Part (I) – Guidelines Revised Mainly to Cater to the Launch of the eMPF Platform on 26 June this year (13 guidelines)

Submission of Application Forms and Annual Returns to the Authority

- (a) *Guidelines I.1 on Application for Approval as Approved Trustees and Application for Approval as Controllers of Approved Trustees*
Guidelines I.2 on Application for Registration of Provident Fund Schemes
Guidelines VI.3 on Annual Returns to be Delivered by Registered Intermediaries
- Amend application forms/annual returns to cater to the situation that scheme administration work of MPF schemes will be taken up by the system operator of the eMPF Platform for MPF schemes which have joined the Platform. Besides, the Personal Information Collection Statement (PICS) attached to the relevant forms/returns in the guidelines are updated.

Streamlined Workflow of Scheme Administration Using the eMPF Platform

- (b) *Guidelines II.1 on Monthly Returns of Registered Schemes*
Guidelines II.6 on Internal Control Report for Each Registered Scheme
Guidelines IV.2 on Reports Relating to Payment of Mandatory Contributions
Guidelines IV.5 on Payment of Accrued Benefits - Permanent Departure from Hong Kong
Guidelines IV.21 on Unclaimed Benefits
Guidelines IV.23 on Transfer Statement and Confirmation
- Set out the streamlined workflow of scheme administration brought about by the eMPF Platform and the transitional arrangements provided for in the MPF legislation.

Textual Changes to Reflect Updated Statutory Wordings and Requirements

- (c) *Guidelines IV.8 on Enrolment and Contribution Arrangements for Relevant Employees Other Than Casual Employees*
Guidelines IV.9 on Enrolment and Contribution Arrangements for Casual Employees
Guidelines IV.10 on Enrolment and Contribution Arrangements for Self-employed Persons
- Make textual changes to the guidelines to align with the updated wordings of the MPF legislation.

(d) *Guidelines VI.2 on Conduct Requirements for Registered Intermediaries*

- Make textual changes to the guidelines to update the conduct requirements for MPF intermediaries due to the launch of the eMPF Platform (e.g. currently, an MPF intermediary who is asked by its client to forward a cheque payment to the MPF trustee of an MPF scheme should do so promptly; this requirement is expanded to cover the system operator of the eMPF Platform as recipient of the cheque to cater for schemes which have joined the eMPF Platform).

Part (II) – Other Guidelines Revised Mainly for Housekeeping Purposes (15 guidelines)

(e) *Guidelines I.4 on Eligible Insurers*

Guidelines I.5 on Application for Approval of Constituent Funds

Guidelines I.6 on Application for Approval of Pooled Investment Funds

Guidelines I.10 on Application for Cancellation of Approval of Constituent Funds

Guidelines I.11 on Application for Cancellation of Approval of Pooled Investment Funds

Guidelines IV.15 on Person Exempt under Section 4(3) of the Mandatory Provident Fund Schemes Ordinance

Guidelines IV.16 on MPF Coverage on Employees Working Outside Hong Kong

Guidelines IV.22 on Statement Required under Section 7AB of the Mandatory Provident Fund Schemes Ordinance

Guidelines V.2 on MPF Exempted ORSO Schemes – Application for Exemption of ORSO Registered Schemes

Guidelines V.6 on MPF Exempted ORSO Schemes – Application for Approval of Appointment of Trustees

Guidelines V.7 on MPF Exempted ORSO Schemes – Application for Approval of Appointment of Directors of Trustees

Guidelines V.8 on MPF Exempted ORSO Schemes – Application for Withdrawal of Exemption Certificate of an ORSO Exempted Scheme

Guidelines V.9 on MPF Exempted ORSO Schemes – Application for Withdrawal of Exemption Certificate of an ORSO Registered Scheme

Guidelines V.11 on MPF Exempted ORSO Schemes – Withdrawal of Minimum MPF Benefits

Guidelines VI.1 on MPF Intermediary Registration and Notification of Changes

- Amend the guidelines by introducing housekeeping changes including updating the PICS in the relevant guidelines, refining the contents of the guidelines and their format for improved presentation and readability.