

Transfer of MPF Scheme

Arrangement and Procedures
4 & 9 October 2023
Finance Office

Contents

- 1. Submission Arrangement**
- 2. Procedures**

1. Submission Arrangement

- a) Submit hardcopy at Helpdesks
- b) Submit softcopy via Students and Staff Services Platform (SSSP)
- c) Please read the [Guidelines on Switching of MPF Scheme](#)
- d) Deadline to submit the MPF Scheme Transfer Option Form is **20 October 2023**

2. Procedures

- a. Submit hardcopies at Helpdesk
 - Helpdesk locations
- b. Submit softcopies via SSSP

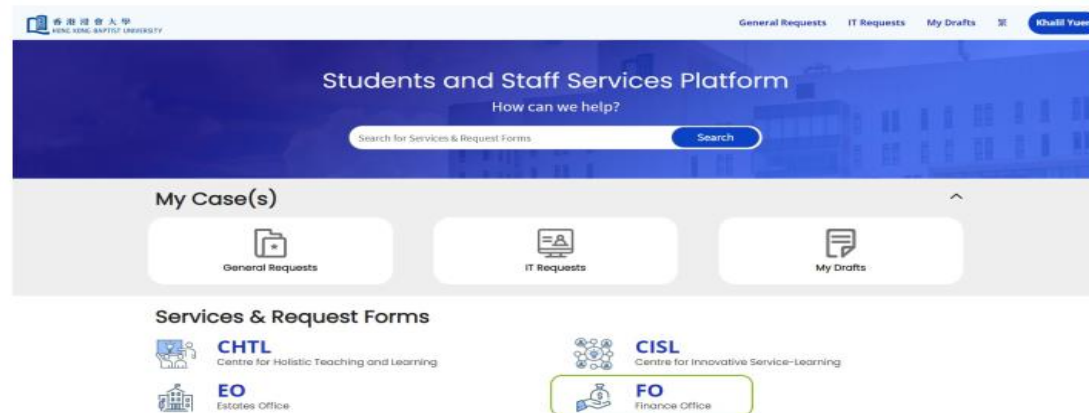
2b. Submit softcopies via SSSP

Step 1 Visit SSSP Website

ACCESS THE MPF FORMS

Access the MPF forms

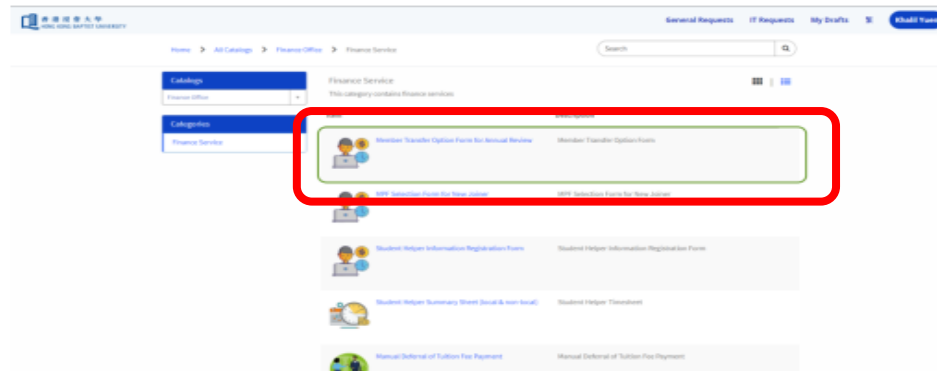
- 1 Access the SSSP (<https://hkbu.service-now.com/sssp>) and login with your SSOID
- 2 Click the **FO** under Services & Request Forms



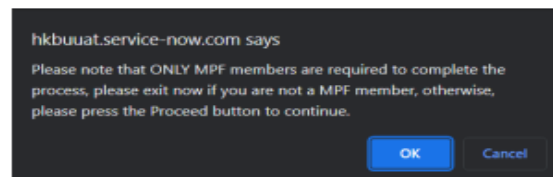
2b. Submit softcopies via SSSP

Step 2 Select MPF Scheme Transfer Option Form Access the Members Transfer Option Form

1 Select Member Transfer Option Form for Annual Review

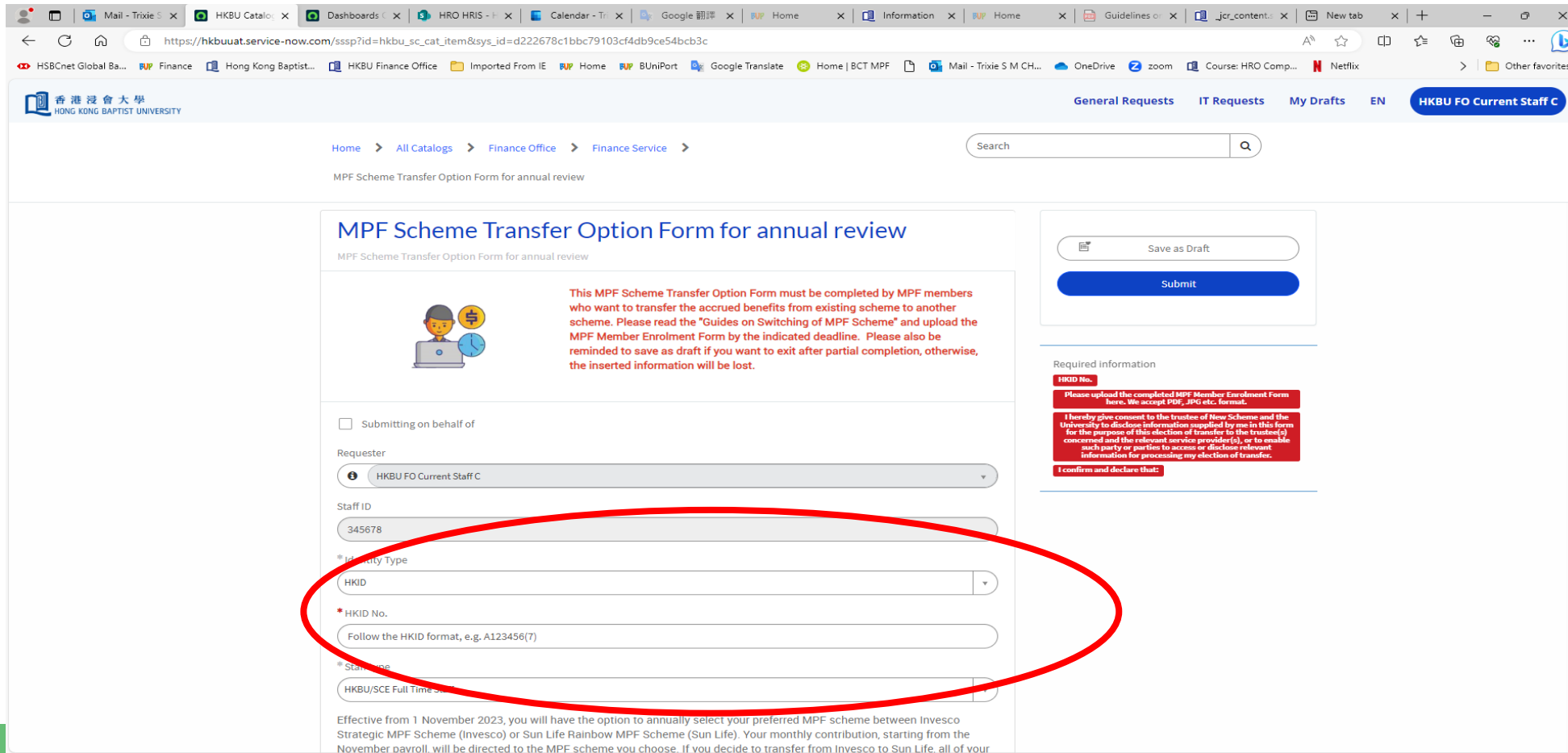


2 The system will display a message informing that only MPF members are required to complete the process. If you are an MPF member, click **OK**



2b. Submit softcopies via SSSP

Step 3 Fill in HKID or Passport Number



MPF Scheme Transfer Option Form for annual review

MPF Scheme Transfer Option Form for annual review

This MPF Scheme Transfer Option Form must be completed by MPF members who want to transfer the accrued benefits from existing scheme to another scheme. Please read the "Guides on Switching of MPF Scheme" and upload the MPF Member Enrolment Form by the indicated deadline. Please also be reminded to save as draft if you want to exit after partial completion, otherwise, the inserted information will be lost.

☐ Submitting on behalf of

Requester
HKBU FO Current Staff C

Staff ID
345678

* Identity Type
HKID

* HKID No.
Follow the HKID format, e.g. A123456(7)

* Staff Name
HKBU/SCE Full Time

Effective from 1 November 2023, you will have the option to annually select your preferred MPF scheme between Invesco Strategic MPF Scheme (Invesco) or Sun Life Rainbow MPF Scheme (Sun Life). Your monthly contribution, starting from the November payroll, will be directed to the MPF scheme you choose. If you decide to transfer from Invesco to Sun Life, all of your

Save as Draft

Submit

Required information

HKID No.

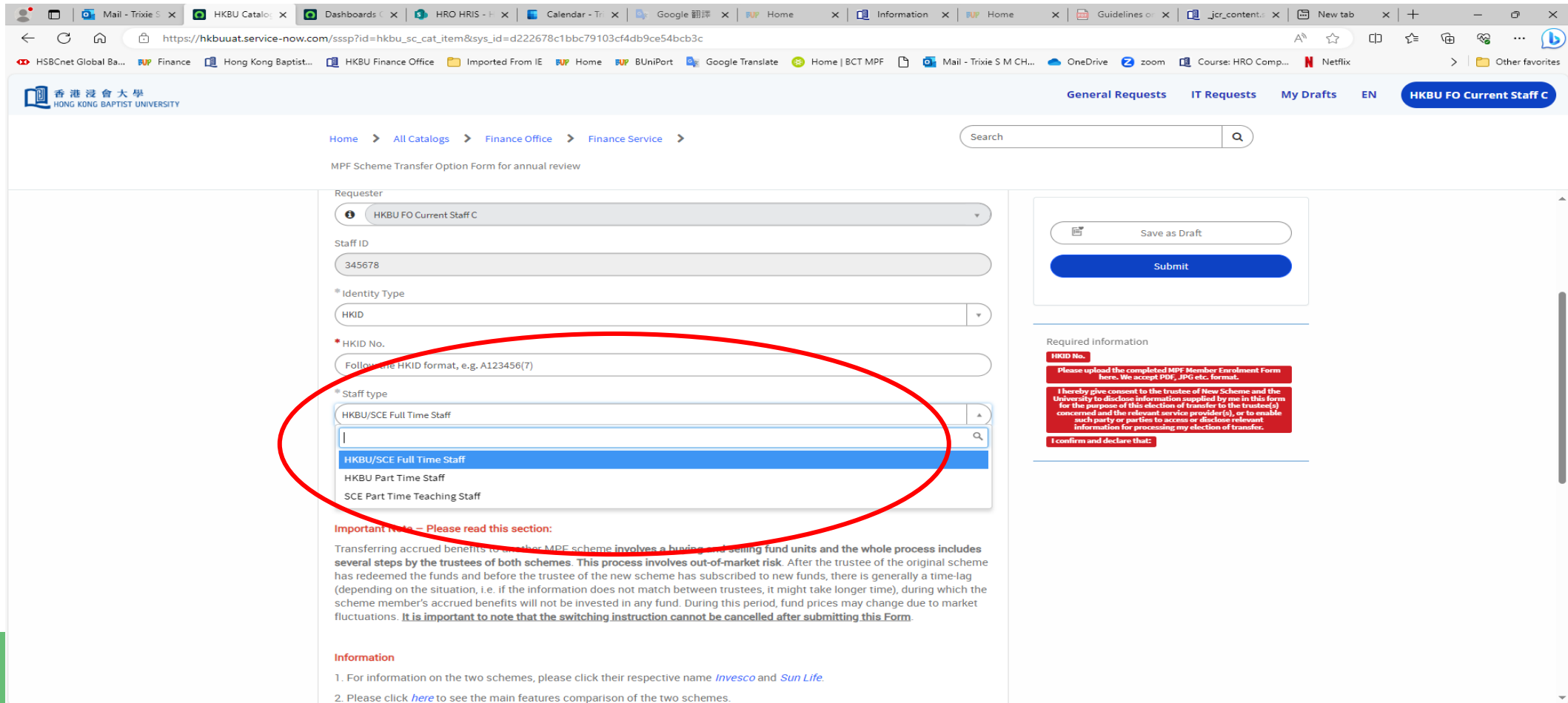
Please upload the completed MPF Member Enrolment Form here. We accept PDF, JPG etc. format.

I hereby give consent to the trustee of New Scheme and the University to disclose information supplied by me in this form for the purpose of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer.

I confirm and declare that:

2b. Submit softcopies via SSSP

Step 4 Select Staff Type



Home > All Catalogs > Finance Office > Finance Service >

MPF Scheme Transfer Option Form for annual review

Requester
HKBU FO Current Staff C

Staff ID
345678

* Identity Type
HKID

* HKID No.
Follow the HKID format, e.g. A123456(7)

* Staff type
 HKBU/SCE Full Time Staff
 HKBU Part Time Staff
 SCE Part Time Teaching Staff

Save as Draft

Submit

Required information

HKID No.
Please upload the completed MPF Member Enrolment Form here. We accept PDF, JPG etc. format.

I hereby give consent to the trustee of New Scheme and the University to disclose information supplied by me in this form for the purpose of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer.

I confirm and declare that:

Important Note – Please read this section:

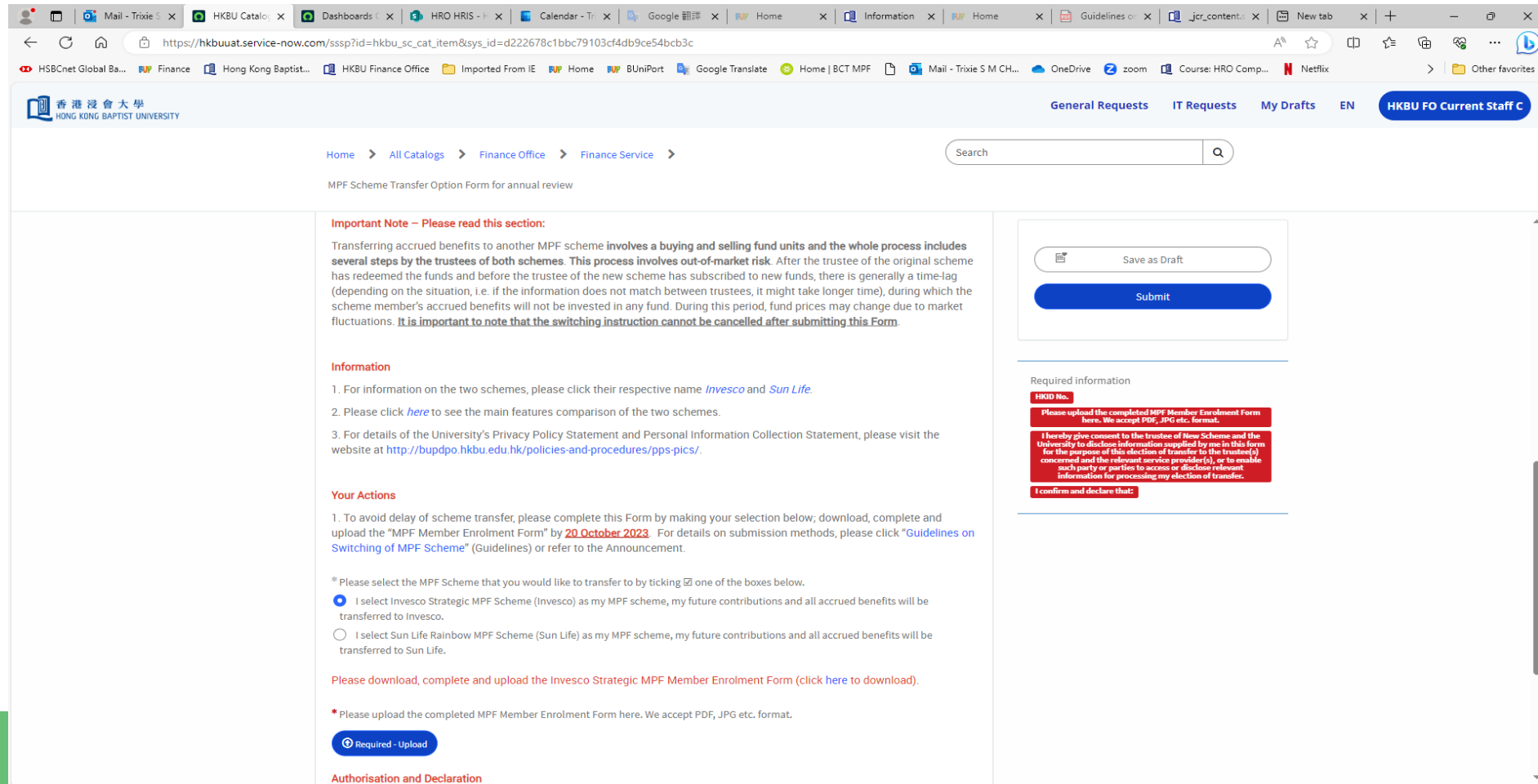
Transferring accrued benefits to another MPF scheme involves a buying and selling fund units and the whole process includes several steps by the trustees of both schemes. This process involves out-of-market risk. After the trustee of the original scheme has redeemed the funds and before the trustee of the new scheme has subscribed to new funds, there is generally a time-lag (depending on the situation, i.e. if the information does not match between trustees, it might take longer time), during which the scheme member's accrued benefits will not be invested in any fund. During this period, fund prices may change due to market fluctuations. **It is important to note that the switching instruction cannot be cancelled after submitting this Form.**

Information

- For information on the two schemes, please click their respective name [Invesco](#) and [Sun Life](#).
- Please click [here](#) to see the main features comparison of the two schemes.

2b. Submit softcopies via SSSP

Step 5 Read Important Notes and click the provided links



The screenshot shows the HKBU SSSP portal for the MPF Scheme Transfer Option Form for annual review. The page is titled "MPF Scheme Transfer Option Form for annual review" and includes a search bar and navigation links. The main content area is divided into three sections: Important Note, Information, and Your Actions.

Important Note – Please read this section:

Transferring accrued benefits to another MPF scheme involves a buying and selling fund units and the whole process includes several steps by the trustees of both schemes. This process involves out-of-market risk. After the trustee of the original scheme has redeemed the funds and before the trustee of the new scheme has subscribed to new funds, there is generally a time-lag (depending on the situation, i.e. if the information does not match between trustees, it might take longer time), during which the scheme member's accrued benefits will not be invested in any fund. During this period, fund prices may change due to market fluctuations. **It is important to note that the switching instruction cannot be cancelled after submitting this Form.**

Information

- For information on the two schemes, please click their respective name [Invesco](#) and [Sun Life](#).
- Please click [here](#) to see the main features comparison of the two schemes.
- For details of the University's Privacy Policy Statement and Personal Information Collection Statement, please visit the website at <http://bupdp0.hkbu.edu.hk/policies-and-procedures/pps-pics/>.

Your Actions

- To avoid delay of scheme transfer, please complete this Form by making your selection below; download, complete and upload the "MPF Member Enrolment Form" by **20 October 2023**. For details on submission methods, please click ["Guidelines on Switching of MPF Scheme"](#) (Guidelines) or refer to the Announcement.

* Please select the MPF Scheme that you would like to transfer to by ticking ☒ one of the boxes below.

☒ I select Invesco Strategic MPF Scheme (Invesco) as my MPF scheme, my future contributions and all accrued benefits will be transferred to Invesco.

☐ I select Sun Life Rainbow MPF Scheme (Sun Life) as my MPF scheme, my future contributions and all accrued benefits will be transferred to Sun Life.

Please download, complete and upload the Invesco Strategic MPF Member Enrolment Form (click [here](#) to download).

* Please upload the completed MPF Member Enrolment Form here. We accept PDF, JPG etc. format.

[Required - Upload](#)

Authorisation and Declaration

On the right side of the page, there is a "Save as Draft" button and a "Submit" button. Below these buttons, there is a "Required information" section with a red box containing the following text:

HRID No.

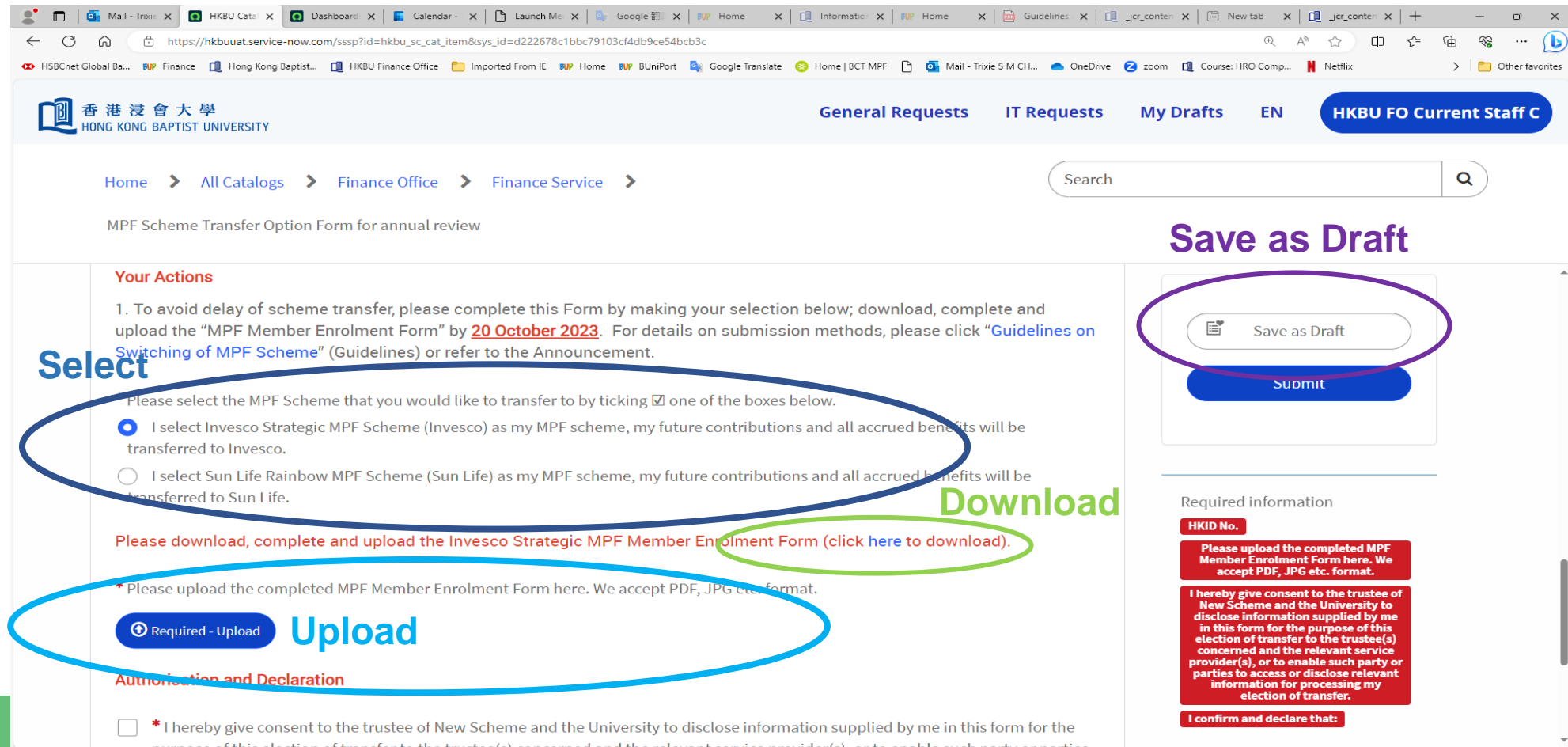
Please upload the completed MPF Member Enrolment Form here. We accept PDF, JPG etc. format.

I hereby give consent to the trustee of New Scheme and the University to disclose information supplied by me in this form for the purpose of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer.

I confirm and declare that:

2b. Submit softcopies via SSSP

Step 6 Select, Download, Save as Draft and Upload



Home > All Catalogs > Finance Office > Finance Service >

MPF Scheme Transfer Option Form for annual review

Your Actions

1. To avoid delay of scheme transfer, please complete this Form by making your selection below; download, complete and upload the "MPF Member Enrolment Form" by **20 October 2023**. For details on submission methods, please click "[Guidelines on Switching of MPF Scheme](#)" (Guidelines) or refer to the Announcement.

Please select the MPF Scheme that you would like to transfer to by ticking ☒ one of the boxes below.

☒ I select Invesco Strategic MPF Scheme (Invesco) as my MPF scheme, my future contributions and all accrued benefits will be transferred to Invesco.

☐ I select Sun Life Rainbow MPF Scheme (Sun Life) as my MPF scheme, my future contributions and all accrued benefits will be transferred to Sun Life.

Please download, complete and upload the Invesco Strategic MPF Member Enrolment Form (click [here](#) to download).

* Please upload the completed MPF Member Enrolment Form here. We accept PDF, JPG etc. format.

Required - Upload **Upload**

Authentication and Declaration

☐ * I hereby give consent to the trustee of New Scheme and the University to disclose information supplied by me in this form for the purpose of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer.

Save as Draft

Required information

HKID No.

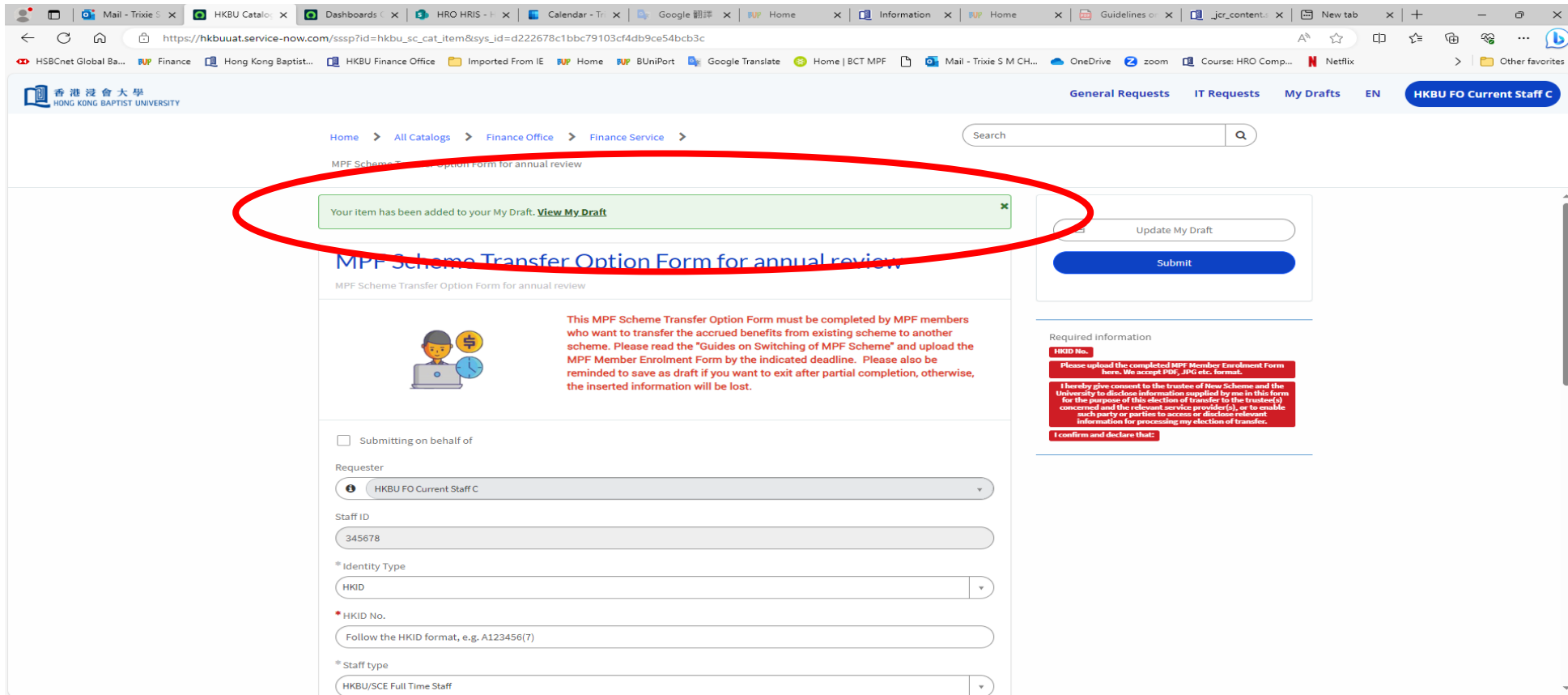
Please upload the completed MPF Member Enrolment Form here. We accept PDF, JPG etc. format.

I hereby give consent to the trustee of New Scheme and the University to disclose information supplied by me in this form for the purpose of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer.

I confirm and declare that:

2b. Submit softcopies via SSSP

Step 7 View My Draft



https://hkbuat.service-now.com/sssp?id=hkbu_sc_cat_item&sys_id=d222678c1bbc79103cf4db9ce54bcb3c

General Requests IT Requests My Drafts EN HKBU FO Current Staff C

Home > All Catalogs > Finance Office > Finance Service >

MPF Scheme Transfer Option Form for annual review

Your item has been added to your My Draft. [View My Draft](#)

MPF Scheme Transfer Option Form for annual review

MPF Scheme Transfer Option Form for annual review

This MPF Scheme Transfer Option Form must be completed by MPF members who want to transfer the accrued benefits from existing scheme to another scheme. Please read the "Guides on Switching of MPF Scheme" and upload the MPF Member Enrolment Form by the indicated deadline. Please also be reminded to save as draft if you want to exit after partial completion, otherwise, the inserted information will be lost.

☐ Submitting on behalf of

Requester

HKBU FO Current Staff C

Staff ID

345678

* Identity Type

HKID

* HKID No.

Follow the HKID format, e.g. A123456(7)

* Staff type

HKBU/SCE Full Time Staff

Update My Draft

Submit

Required information

HKID No.

Please upload the completed MPF Member Enrolment Form here. We accept PDF, JPG etc. format.

I hereby give consent to the trustee of New Scheme and the University to disclose information supplied by me in this form for the purpose of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing any election of transfer.

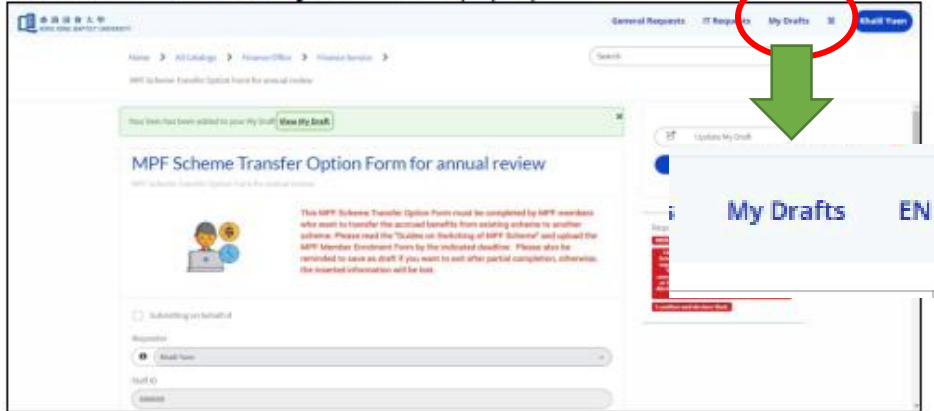
I confirm and declare that:

2b. Submit softcopies via SSSP

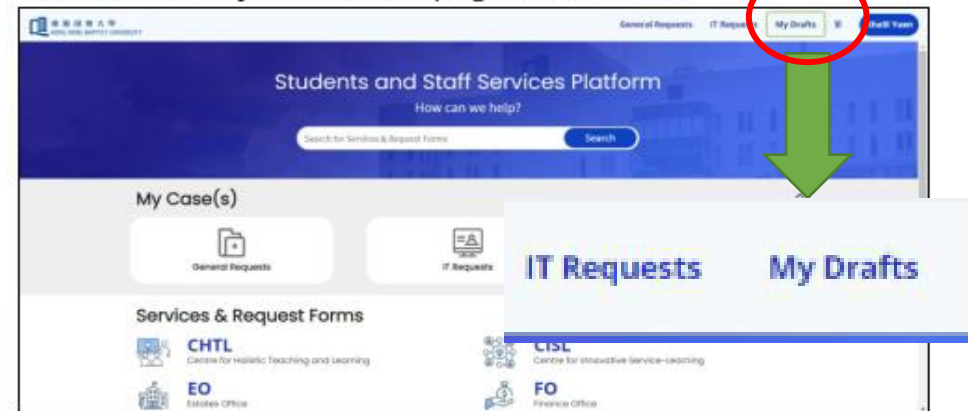
Step 8 Retrieve My Draft

Once the form is saved as a draft, you can access your draft list using the following methods:

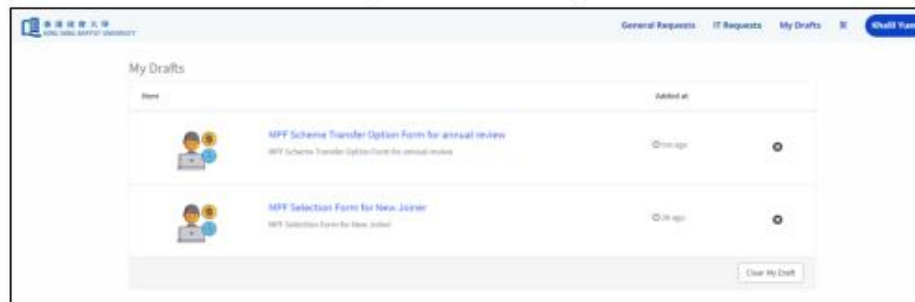
Method 1. Click **View My Draft** in the pop-up



Method 2. Click **My Draft** on the top right corner of SSSP

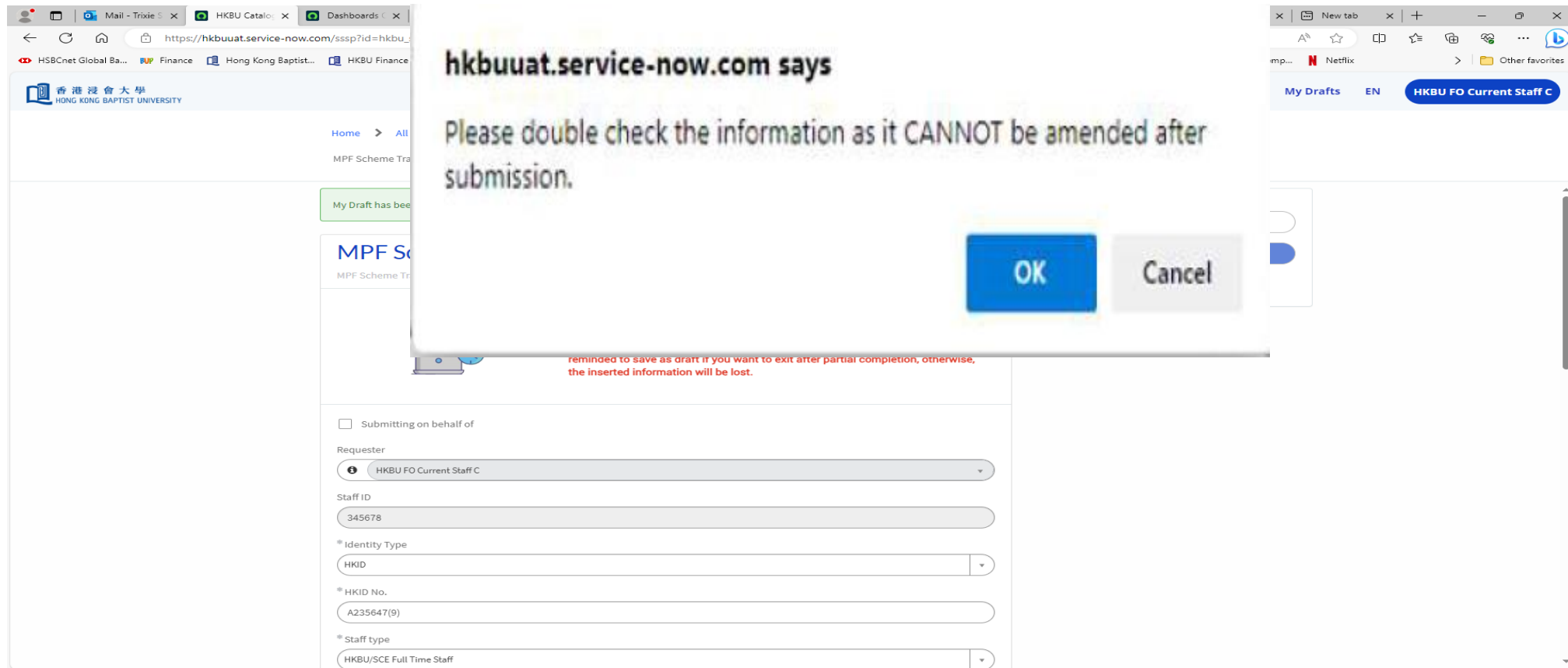


After clicking the button, you will be redirected to the **My Draft** list where you can submit, edit or delete your draft on that page



2b. Submit softcopies via SSSP

Step 9 Submission



The screenshot shows a web browser window displaying the HKBU SSSP submission form. A modal dialog box is overlaid on the form, displaying the following text:

hkbuaat.service-now.com says

Please double check the information as it CANNOT be amended after submission.

OK Cancel

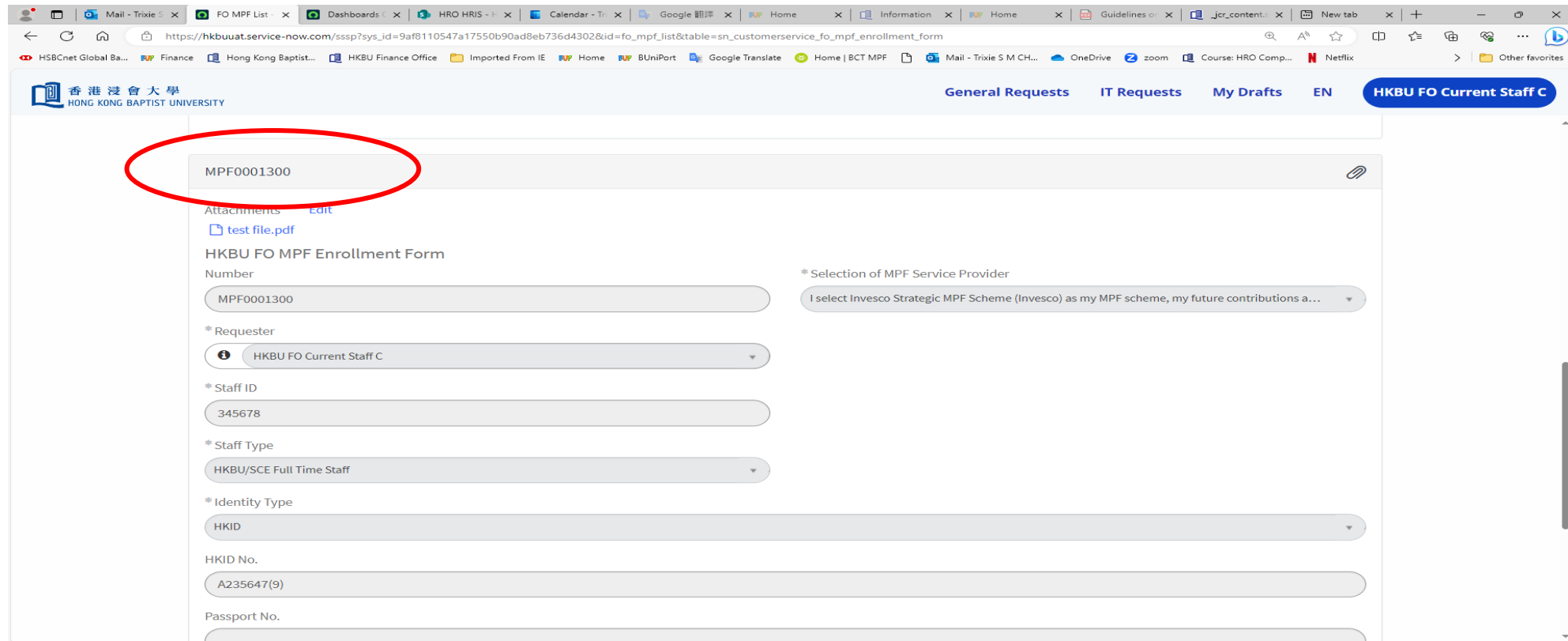
reminded to save as draft if you want to exit after partial completion, otherwise, the inserted information will be lost.

The background form is titled "MPF Scheme Transfer" and includes the following fields:

- ☐ Submitting on behalf of
- Requester: HKBU FO Current Staff C
- Staff ID: 345678
- * Identity Type: HKID
- * HKID No.: A235647(9)
- * Staff type: HKBU/SCE Full Time Staff

2b. Submit softcopies via SSSP

Step 10 After Submission with Reference Number



The screenshot shows the HKBU SSSP portal interface. The top navigation bar includes the HKBU logo and the text "HONG KONG BAPTIST UNIVERSITY". The main header area contains links for "General Requests", "IT Requests", "My Drafts", "EN", and a button for "HKBU FO Current Staff C". The main content area displays the "MPF0001300" reference number, which is circled in red. Below this, there is a section for "Attachments" with a link to "test file.pdf". The form fields include:

- Number: MPF0001300
- * Selection of MPF Service Provider: I select Invesco Strategic MPF Scheme (Invesco) as my MPF scheme, my future contributions a...
- * Requester: HKBU FO Current Staff C
- * Staff ID: 345678
- * Staff Type: HKBU/SCE Full Time Staff
- * Identity Type: HKID
- HKID No.: A235647(9)
- Passport No.:

Final Deadline **20 October 2023**

Enquiry: Ms Scarette CHENG 3411 5114
Ms Emily LAM 3411 7926
email: fopayrollrb@hkbu.edu.hk