

HONG KONG BAPTIST UNIVERSITY
Human Resources Office

P890/H2
(Revised June 2007)

HUMAN RESOURCES POLICIES & PROCEDURES/HOUSING

PRIVATE TENANCY ALLOWANCE

1. Eligibility

Staff members whose salary is equivalent to Civil Service Master Pay Scale Point 34 and above and who joined the University before 1 October 1998 and who have not opted to join the Home Financing Scheme will be eligible to claim a Private Tenancy Allowance for leased residential accommodation appropriate to their salary level and family status subject to a rental charge and the conditions of grant as stipulated below.

2. Scale of Allowance

- 2.1 Eligible staff members will be reimbursed the rental costs up to their actual rent payable, subject to the limit of their entitled rates of the allowance as revised by the University Council from time to time.
- 2.2 An eligible staff member will receive private tenancy allowance from the scale of rates prevailing when he/she commences a new tenancy or extends or renews an existing tenancy for the entire term of tenancy agreement, irrespective of subsequent upward or downward adjustment to the rate of allowance.

3. Deduction from Salary

Private Tenancy Allowance is payable subject to a rental deduction of 7.5% of the basic monthly salary of the staff member.

4. Conditions of Grant

Legal Responsibility

- 4.1 The lease of private tenancy must be signed between the landlord and staff member in his/her personal capacity, and the University shall not be responsible for the premises or for any obligation under the lease.
- 4.2 The University shall not be responsible for any repairs, renovations, or other works in private tenancy accommodations.
- 4.3 Stamp duty on the tenancy agreement, agent's commission (if any), rental deposit (if any), water charges, electricity charges, gas charges, telephone charges, cleaning and other utility charges shall be the personal responsibility of the staff member concerned.

Lease Period

- 4.4 The lease should normally be for a period of two years, unless prior approval from the Human Resources Office for entering into a lease of a longer or shorter duration has been obtained.

Extent of Coverage

- 4.5 The Private Tenancy Allowance payable may cover actual rental in respect of the leased tenancy (including rates, management fees and one car park rental for a vehicle owned by the staff member or his/her spouse if payable by the tenant; Government rent however will not be covered by the allowance) and should be within the entitled rates of allowance as stipulated by the University from time to time. A staff member may be allowed to take a private tenancy at a rent above the staff member's maximum entitled allowance only if he/she is prepared to pay the excess cost.

Changes During the Lease Period

- 4.6 A staff member in receipt of private tenancy allowance must notify the Human Resources Office within two weeks of any change in family status which may result in a reduction in the maximum limit of his/her allowance.
- 4.7 If any change occurs in salary, marital or family status of a staff member occupying private premises for which he/she is paying rent in excess of the approved private tenancy allowance, and the change increases such an allowance, he/she may claim the increased amount with effect from the date of the change.
- 4.8 If a staff member wishes to terminate an existing lease before its expiry, he/she should notify the University in writing prior to the date of termination. In case he/she subsequently enters into a new lease, he/she should submit a fresh application and the prevailing rate of allowance shall apply. The University also reserves the right to impose conditions for premature termination of tenancy agreement.

Entitlement

- 4.9 Private Tenancy Allowance at family or married rates is payable only when the appointee's family or spouse resides with him/her in Hong Kong. In the case of dependent children, they must be unmarried and under the age of 19; or aged 19 or 20 but in full-time education or in full-time vocational training; or dependent on the appointee as a result of physical or mental infirmity.
- 4.10 A staff member residing in an accommodation wholly or jointly owned by himself/herself, or his/her spouse's immediate family (including parents, brothers, sisters, children and their spouses) or in respect of which they have direct or indirect financial interest, shall not be granted a Private Tenancy Allowance.

Prevention of Double Housing Benefits

- 4.11 The University, as a publicly-funded institution, is required by the Government to enforce the Prevention of Double Housing Benefits Rules when providing housing benefits to its staff members. A staff member who wishes to apply for housing benefits from the University must observe and comply with the Rules (a copy of which is attached).

Others

- 4.12 Private tenancies which qualify for any reimbursement of rent under these rules may not be used for profit or gain, or for any purpose other than residential accommodations. Letting or sub-letting and the taking in of paying guests is prohibited, except where the guest is also a member of the University eligible for accommodation, and the permission of the University has been obtained. The term "paying guest" includes any guest who pays in cash, in kind or service for the accommodations occupied.
- 4.13 Any false representation on the claim for Private Tenancy Allowance or any abuse of the conditions governing the grant of Private Tenancy Allowance may result in the withdrawal of a staff member's Private Tenancy Allowance and/or any further disciplinary/criminal proceedings.
- 4.14 The University reserves the right to conduct "surprise" home visits to ensure that the live-in requirement is fulfilled.
- 4.15 The conditions governing Private Tenancy Allowance may be amended by the University from time to time, and will be promulgated to staff members through the Human Resources Office Circulars.

5. Application and Reimbursement

- 5.1 An application for Private Tenancy Allowance should be made to the Human Resources Office by submitting a Private Tenancy Allowance Application Form duly completed and accompanied by an officially stamped lease agreement of the accommodation.
- 5.2 When an application is approved, the University will reimburse the staff member the rent (including rates, management fees and one car park rental if payable by the tenant; Government rent however is not reimbursable) provided that the amount to be reimbursed will not exceed his/her maximum entitled allowance. In the case of rates, a proportionate amount to represent the monthly amount payable should be included in the monthly rental bill where possible. The University reserves the right to seek advice from the Commissioner of Rating and Valuation Department as to the reasonable rental amounts and the University may only approve rental amounts based on the advice received.
- 5.3 Reimbursement of rent and rates will be made monthly to staff members through monthly payroll. Staff members should properly keep and present the relevant certified receipts to the Finance Office on a bi-annual basis in June and December each year.

Human Resources Office

June 2007

KC/PM:pn

PTA-POLIOCY

(Revised 7/94, 5/95, 11/95, 5/97, 7/97, 9/97, 10/98, 11/99, 6/00, 7/00; 10/06, 6/07)

Rules on Prevention of Double Housing Benefits

1. The University, as a publicly-funded institution, is required by the Government to enforce the Rules on Prevention of Double Housing Benefits (hereafter referred to as the Rules) when providing housing benefits to its staff members. In essence, the Rules are summarized as follows:
 - (a) A staff member may only receive one form of housing benefit at any one time irrespective of whether it is provided by the University.
 - (b) A married staff member and his/her spouse are regarded as one entity. The couple may not receive more than one form of housing benefit at any one time irrespective of whether it is provided by the Government, by publicly-funded organizations or by private employers.
 - (c) If a staff member or his/her spouse/ex-spouse(s) had worked in the Government or publicly-funded institutions and had received allowances under either the Home Purchase Scheme (HPS) or Home Financing Scheme (HFS), the staff member can only continue to claim such allowance from the University for an entitlement period under such Scheme which will be reduced by the period of assistance he/she has obtained from the Government or other publicly-funded institutions. The staff member cannot claim other forms of housing benefits e.g. Private Tenancy Allowance, Housing Allowance or University Quarters. After the completion of the entitlement period of a total of 10 years, the staff member's eligibility for housing benefits will cease permanently.
 - (d) If a staff member or his/her spouse is a tenant and/or authorized occupant of a public rental housing flat provided by either the Hong Kong Housing Authority or Hong Kong Housing Society, the staff would not be eligible for the University housing benefits unless the staff member or his/her spouse relinquishes such benefits.
 - (e) If a staff member or his/her spouse is a registered owner and/or authorized occupant of a flat sold under one of the public home ownership schemes [including flats sold under the Home Ownership Scheme, the Private Sector Participation Scheme and the Secondary Market Scheme administered by the Hong Kong Housing Authority, and the Flat for Sale Scheme and the Urban Improvement Scheme (only Urban Improvement Scheme flats completed before March 1981) administered by the Hong Kong Housing Society], or under the Sandwich Class Housing Scheme administered by the Hong Kong Housing Society or under the Tenant Purchase Scheme administered by the Hong Kong Housing Authority, the staff would not be eligible for the University housing benefits, except where the re-sale restriction period has ceased to be applicable, and except where provision is included in the rules for the Home Financing Scheme for the staff to receive concurrent housing benefits.
 - (f) If a staff member or his/her spouse is a recipient of, or the crucial member of a family in receipt of a public housing loan (such as the Sandwich Class Housing Loan Scheme or the Home Starter Loan Scheme administered by the Hong Kong Housing Society; or the Home Purchase Loan Scheme administered by the Hong Kong Housing Authority), the staff would not be eligible for the University housing benefits, except where provision is included in the rules on the Home Financing Scheme for the staff to receive concurrent housing benefits.
2. The term "housing benefits", other than those specifically referred to in paragraphs 1 (c) to (f) above, refer to element of housing assistance in various forms included in a pay package. The following are examples of housing benefits being provided as part of a pay package:-
 - (a) accommodation provided by the employer, whether or not rent is payable by the employee;
 - (b) a housing loan or any form of subsidy, whether it is for purchasing local or overseas property;
 - (c) an allowance for renting accommodation or purchasing property, whether or not it is accountable or taxable;
 - (d) a cash allowance provided in lieu of housing benefits, whether or not it is accountable or taxable;
 - (e) a cash allowance which is provided to encash fringe benefits including housing, whether or not it is accountable or taxable; (e.g. cash allowances provided by the Legislation Council Commission, the Office of the Ombudsman, the Equal Opportunities Commission, the Office of the Privacy Commissioner for Personal Data; and the Flexible Allowance provided by the Hospital Authority to its staff and by the University of Hong Kong/the Chinese University of Hong Kong to their clinical staff); and
 - (f) any portion of a pay package actually claimed by an employee as rental reimbursement for tax purposes in his/her tax return, (e.g. the tax efficiency schemes offered by some utility companies).



Application for Private Tenancy Allowance

Notes

1. Applicants should read the "Human Resources Policies & Procedures/Housing-Private Tenancy Allowance" attached to this application form carefully before completing this form.
2. The University will **NOT** accept any responsibilities for any commitments to the landlord(s) or agent(s) which are agreed between the applicant and the landlord(s) or agent(s) but are in conflict with the University's policy. In case of doubt, applicants should seek advice from the Human Resources Office before entering into a formal lease agreement.
3. A copy of the stamped tenancy agreement should be attached to this application form and its original should also be submitted to the Human Resources Office for verification purpose.
4. The University reserves the right to seek advice from the Commissioner of Rating and Valuation Department as to the reasonable rental amount and the University may only approve a rental amount based on the advice received.
5. Additional information as supporting evidence may be sought from the applicant as and when deemed necessary by the University.
6. The University reserves the right to conduct "surprise house visit" to ensure that the live-in requirement is fulfilled.
7. Except those who are provided with heavy furniture and appliances for their leased premises by the University under special circumstances and those who live in fully furnished apartments, applicants in receipt of Private Tenancy Allowance will be paid Furniture and Domestic Appliances Allowance at a rate as determined by the Council.
8. Upon approval of your application, the allowance will be credited into your bank account together with your payroll at the end of each month. All relevant original receipts should be properly kept and presented to the Finance Office on a bi-annual basis.
9. The information provided in this application will be used by the Human Resources Office and related office(s) for the purpose of considering the grant of Private Tenancy Allowance. Please ensure that Parts I to IV are completed in full.

I. Particulars of Applicant:

1. Name: * Prof./Dr./Mr./Mrs./Ms./Miss _____

2. Staff ID Card No.: _____ 3. Contact Phone No.: _____

4. Post: _____ 5. Department/Office: _____

6. Marital Status:

☐ * Single/Separated/Divorced/Widowed☐ Married, accompanied by spouse in Hong Kong☐ # Married, unaccompanied by spouse in Hong Kong

If your family members will reside with you in Hong Kong in due course, please give details:

7. Dependent child(ren) residing with Applicant in Hong Kong:

Name	Sex	Date of Birth	Name of attending School/Institution

II. Particulars of the Lease:

1. Nature of Lease:

- ☐ new
- ☐ renewed (expiry date of existing/last tenancy: _____)
- ☐ pre-existing

2. Address of property: _____
Tel. No.: _____

3. Period of Lease: From _____ to _____ (_____ years)

4. Breakdown of Monthly Payment:

Monthly Rental: HK\$ _____/month

<u>Inclusive of</u>	<u>Exclusive of</u>	<u>Items</u>	
<input type="checkbox"/>	<input type="checkbox"/>	Rates	HK\$ _____/month
<input type="checkbox"/>	<input type="checkbox"/>	Management Fees	HK\$ _____/month
<input type="checkbox"/>	<input type="checkbox"/>	Car Park	HK\$ _____/month

Total Amount Paid: HK\$ _____/month

5. Size of property: _____ * sq.m./sq.ft. (* Gross/Net)

6. The rented flat is *unfurnished/partially furnished/fully furnished and the following are provided:

Domestic appliances (e.g. fridge, water heater, air conditioner, etc.)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Built-in furniture (e.g. shelves, wardrobes, etc.)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Furniture (e.g. settee, tables, beds, etc.)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Furnishing (e.g. curtains, carpets, etc.)	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Others (Please specify): _____

7. Name and Address of Landlord: _____
Tel. No.: _____

8. Particulars of Car park and Vehicle, if any:

Location of Car park: _____
_____Name and Address of Landlord of the Car park (if different from that of residential property): _____
Tel. No.: _____Vehicle Owner: ☐ Self ☐ SpouseVehicle Registration No.: _____
(Please provide a copy of the vehicle registration document.)

Remarks: _____

III. Updating of Personal Data

In case there is a change in your residential address, your personal data in the Human Resources Office will accordingly be updated. Please indicate if you would also like to update your correspondence address in the Human Resources Office record:

☐ Yes ☐ No

IV. Declaration and Undertaking

1. I declare that:

- a) I have read and fully understood the policies and procedures governing the grant of Private Tenancy Allowance and the "Rules on Prevention of Double Housing Benefits";
- b) the information given by me in the "Statement in Respect of Housing Benefits" relating to my (and my spouse's/ex-spouse's) claim histories for housing benefits is correct; and
- c) the leased property stated in this application is not owned directly or indirectly by myself and/or my spouse and/or any immediate relatives of either myself or my spouse. (Immediate relatives include (a) parents, (b) brothers, sisters and their spouses and (c) children and their spouses.) I do not have direct or indirect financial interest of any form in the property.

2. I undertake:

- a) to abide by the policies and procedures governing the grant of Private Tenancy Allowance (including those for the prevention of double housing benefits); and
- b) to notify the Human Resources Office immediately should there be any change in the foregoing particulars (other than salary increase) which may affect my eligibility for the University housing benefits or this Housing Scheme.

3. I understand that the provision of false or incorrect information or the withholding of any material information may render me liable to refund all or part of the benefits received, and/or to disqualification from all forms of housing benefits provided by the University, and/or to disciplinary proceedings/legal action.

Signature of Applicant

Date

- End of Application -

V. Certification of Entitlement *(to be completed by Human Resources Office)*

The application is *approved/not approved. Relevant details of the applicant are confirmed as follows:

Salary: HK\$ _____/month

Applicable Rate: * Single / Married / Family

Corresponding PTA Rate: _____/month (Scale Year: _____)

Rental Approved: _____/month

<input type="checkbox"/> Inclusive of	}	<input type="checkbox"/> Rates
<input type="checkbox"/> Exclusive of		<input type="checkbox"/> Management Fee
		<input type="checkbox"/> Car Park

Effective Date: _____

(DD/MM/YY)

Lease Status: ☐ New Application

☐ New Letting

☐ Renewal of Existing Lease which will end/has ended on _____(DD/MM/YY)

☐ Early Termination of Existing Lease which should end on _____(DD/MM/YY)

Remarks, if any: _____

for Director of Human Resources

Date

VI. Record for Finance Office

Monthly Payments (By the Applicant)

Rent HK\$ _____

Rates HK\$ _____

Management Fees HK\$ _____

Car Park Charges HK\$ _____

Total Payments HK\$ _____

Housing Code 06 PTA
08 PTA Staff in SSQTenancy Period _____
Start Date _____

Prepared By _____

Approved By _____

Input By _____

Approved Allowance (By the University)

Maximum PTA Allowed HK\$ _____/month

Furniture Allowance HK\$ _____/month

Family Status Family/Married/Single

PTA Approved Start Date _____

PTA Approved End Date _____

A/D Type 006

End Date _____

Date _____

Date _____

Date _____



HONG KONG BAPTIST UNIVERSITY
Human Resources Office

HRO/HSG/F12

Application for Adjustment of Private Tenancy Allowance

Notes

- 1. Recipients of Private Tenancy Allowance (PTA) who wish to apply for adjustment of PTA arising from the addition of car park and/or changes of marital/family status should complete this application form and return it together with supporting documents to the Human Resources Office as soon as possible.*
- 2. Adjustment of PTA arising from salary changes or changes in management fee/rates will be handled by the Finance Office directly.*
- 3. Upward adjustment of PTA will be made with effect from the date of change subject to the appointee's production of documentary proof.*

1. Name: *Prof./Dr./Mr./Mrs./Ms./Miss _____
2. Staff ID Card No.: _____
3. Contact Phone No.: _____
4. Post: _____
5. Department/Office: _____

I. Particulars of Change(s)

This is to inform the Human Resources Office of the following change(s) which may affect the amount of my PTA and request you to make adjustment of the PTA payable to me (please tick as appropriate):

1. ☐ *married / divorced / separated / widowed on _____
(DD/MM/YY)
2. ☐ first child born on _____
(DD/MM/YY)
3. ☐ child (_____) no longer classified as 'dependent' on _____
Name (DD/MM/YY)
4. ☐ family member (_____) not residing in Hong Kong since _____
Name (DD/MM/YY)
5. ☐ addition of car park

Particulars of car park and vehicle:

Address: _____

Name and address of landlord of car park: _____
_____ Tel. No.: _____

Vehicle Owner: ☐ self
☐ spouse

Vehicle Registration No.: _____
(Please provide a copy of the vehicle registration document.)

* Please delete as appropriate

II. Details of PTA Received

Currently I receive PTA of HK\$ _____ per month and the actual amount payable for private tenancy is:

Monthly rental:

HK\$ _____

Inclusive of

Exclusive of

Items

☐
☐

Rates

HK\$ _____

☐
☐

Management Fees

HK\$ _____

☐
☐

Car Park Charges

HK\$ _____

Total:

HK\$ _____

Signature: _____

Date: _____

-- End of Application --

III. Certification of Entitlement (to be completed by Human Resources Office)

This is to certify that the applicant is entitled to a maximum monthly PTA of HK\$ _____.

Please adjust the appropriate amount of PTA payable to the applicant with effect from _____.

_____ for Director of Human Resources

_____ Date

IV. Record For Finance Office

	<i>CHANGE</i>	<i>EXISTING AMOUNT APPROVED</i>	<i>NEW AMOUNT APPROVED</i>	<i>(/ / - / /) PAYMENTS BACKPAY</i>
Rent	HK\$ _____	HK\$ _____	HK\$ _____	HK\$ _____
Rates	HK\$ _____	HK\$ _____	HK\$ _____	HK\$ _____
Management Fees	HK\$ _____	HK\$ _____	HK\$ _____	HK\$ _____
Car Park Charges	HK\$ _____	HK\$ _____	HK\$ _____	HK\$ _____
Total Payments	HK\$ _____	HK\$ _____	HK\$ _____	HK\$ _____
Furniture Allowance	HK\$ _____ /month		HK\$ _____	HK\$ _____

Family Status Family / Married / Single

Housing Code: 06 PTA
08 PTA Staff in SSQ

A/D Type: 006

PTA Approved Start Date: _____

End Date: _____

Tenancy Period Start Date: _____

End Date: _____

Prepared By: _____

Date: _____

Approved By: _____

Date: _____

Input By: _____

Date: _____

HONG KONG BAPTIST UNIVERSITY
Rates of Private Tenancy Allowance (PTA)

Government salary point (for reference)	Allowance Per Month (HK\$) (w.e.f. 1.4.2025)		
	“Family” Rates	“Married” Rates	“Single” Rates
<i>D2 and above</i> (\$194,825 and above)	42,850	38,550	34,280
<i>MPS 41-D1</i> (\$106,155 - \$179,425)	36,080	32,450	28,870
<i>MPS 38-40</i> (\$93,255 - \$101,775)	31,900	28,670	25,510
<i>MPS 34-37</i> (\$82,330 - \$89,170)	26,960	24,250	21,570

Note:

- (1) Where a staff member’s salary on the University Salary Ranges falls between two points on the Government Directorate/Master Pay Scales, the rate of PTA shall be based on that of the nearest lower point on the Government Directorate/Master Pay Scales.
- (2)
 - (a) “Family” rates are applicable to –
 - (i) married staff members (accompanied by spouse) with one or more dependent children;
 - (ii) married staff members (unaccompanied by spouse) with more than one dependent child; and
 - (iii) married staff members with more than one dependent child and who are separated, divorced or widowed.
 - (b) “Married” rates are applicable to –
 - (i) married staff members (accompanied by spouse) without (or unaccompanied by) any dependent children; and
 - (ii) staff members with one dependent child and who are married (unaccompanied by spouse), separated, divorced or widowed.
 - (c) “Single” rates are applicable to staff members without (or unaccompanied by) any dependent children and who are single, married (unaccompanied by spouse), separated, divorced or widowed.
 - (d) In the case of dependent children, they are expected to be residing in Hong Kong with the staff members concerned for the purpose of claiming the respective rates of PTA.