



**THE UNIVERSITY OF HONG KONG**

# **USER GUIDE FOR ONLINE SUBMISSION OF MPF ENROLMENT FORM**

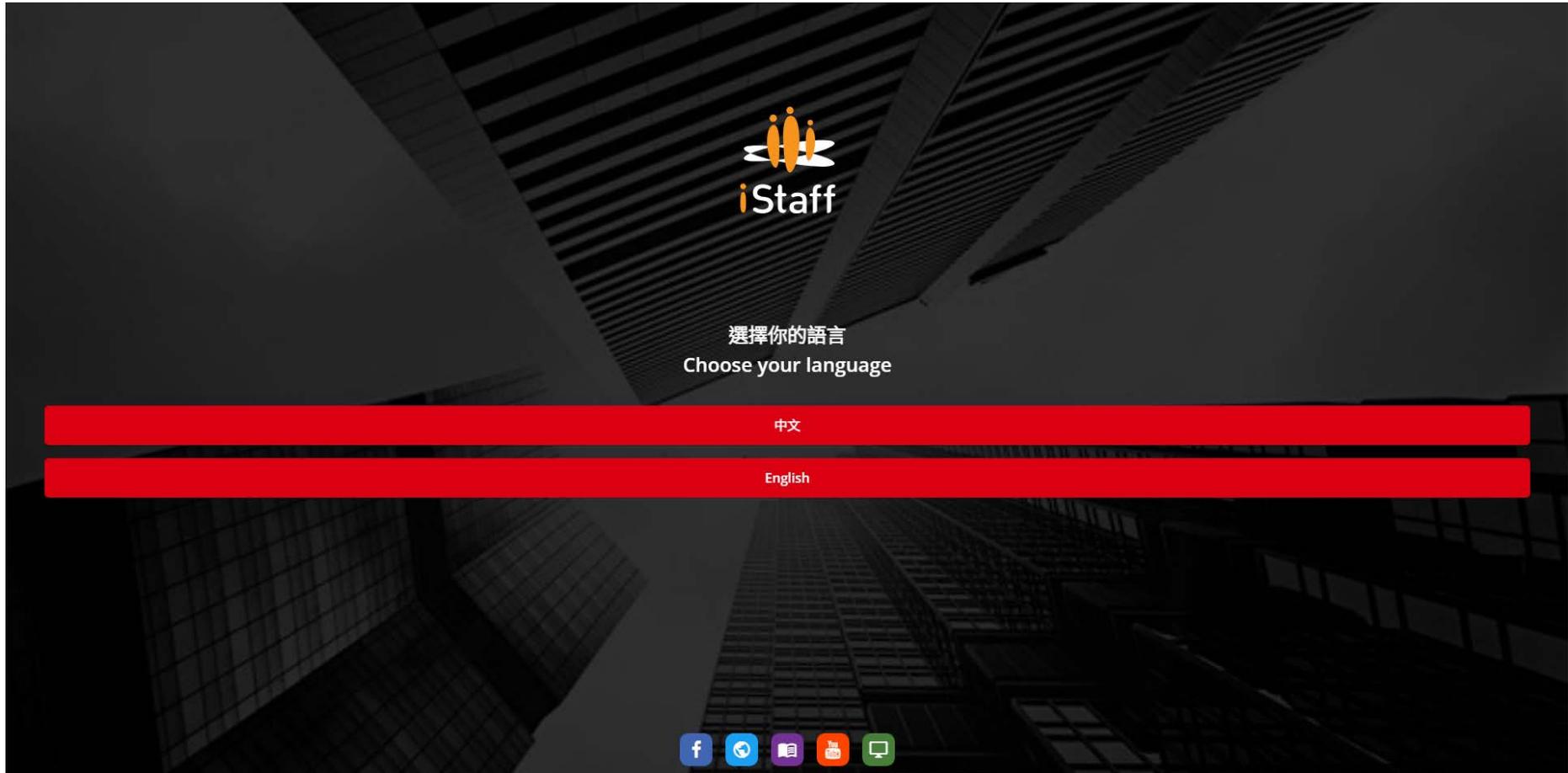
**Human Resources Office**

**December 2023**

## A. Account Registration

Go to the MPF e-enrolment platform: <https://hsbc.istaff.hk/Account/Guest;er=20487657>

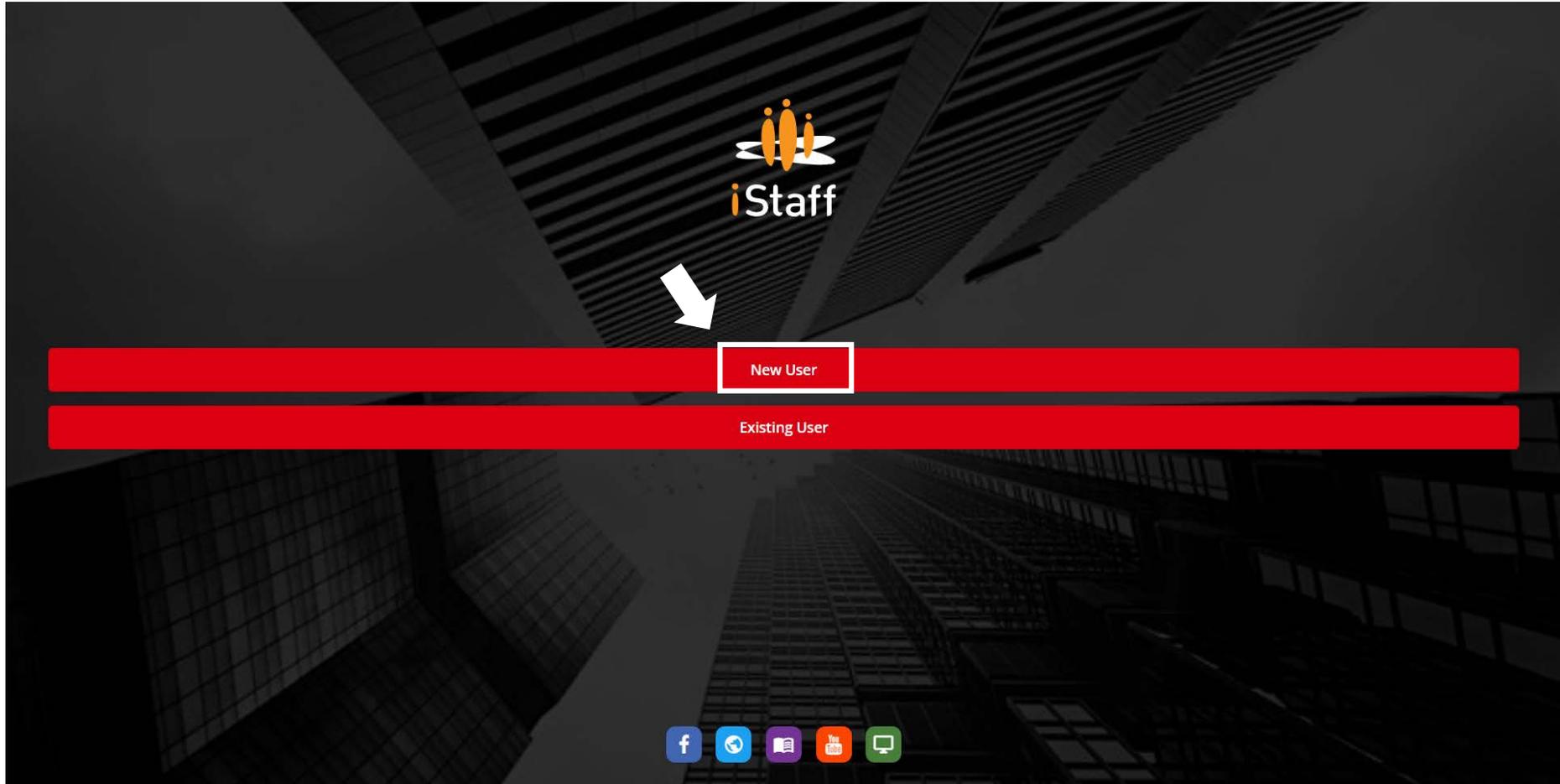
1. Choose your preferred language



2. Select “New User”

**NOTE:**

- ❖ For appointees **re-joining the University** after a break of service, please select “**New User**” and **submit a new MPF enrolment form** even if you have previously submitted an MPF enrolment form through the platform for your previous appointment(s).

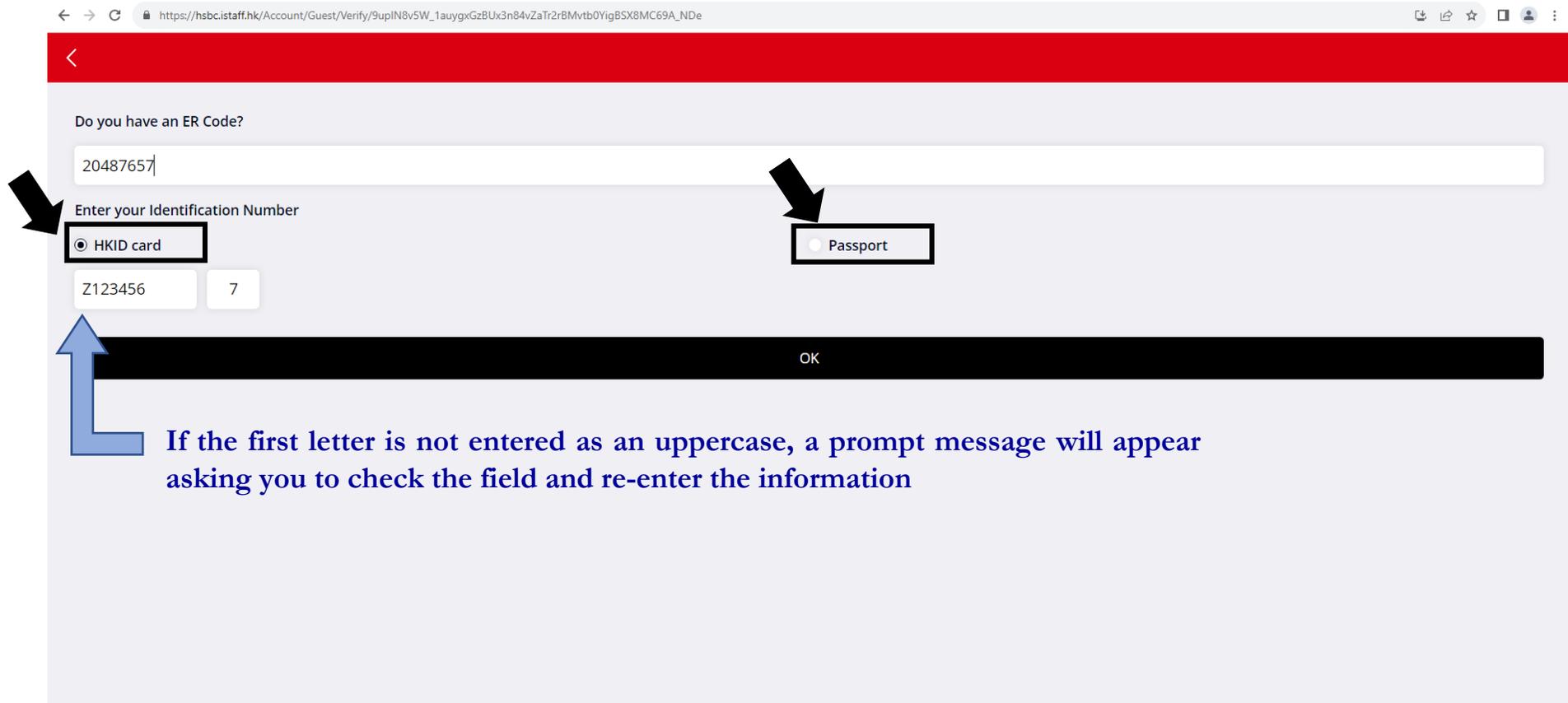


3. Enter EITHER your **HKID no.** (e.g. Z123456(7)) (OR Passport no. (e.g. H9876543210) -only for those who have yet to obtain the HKID)

   the first letter has to be an uppercase

**NOTE:**

- ❖ Please use the HKID no. instead of the passport no. as the key identifier for your MPF account. In the event that you not yet have an HKID and have provided your passport no. in the form, please notify the Human Resources Office once you have obtained your HKID
- ❖ ER Code is the Employer ID for HKU and is already prefilled with the value of “20487657” in the form.



Do you have an ER Code?

20487657

Enter your Identification Number

HKID card

Passport

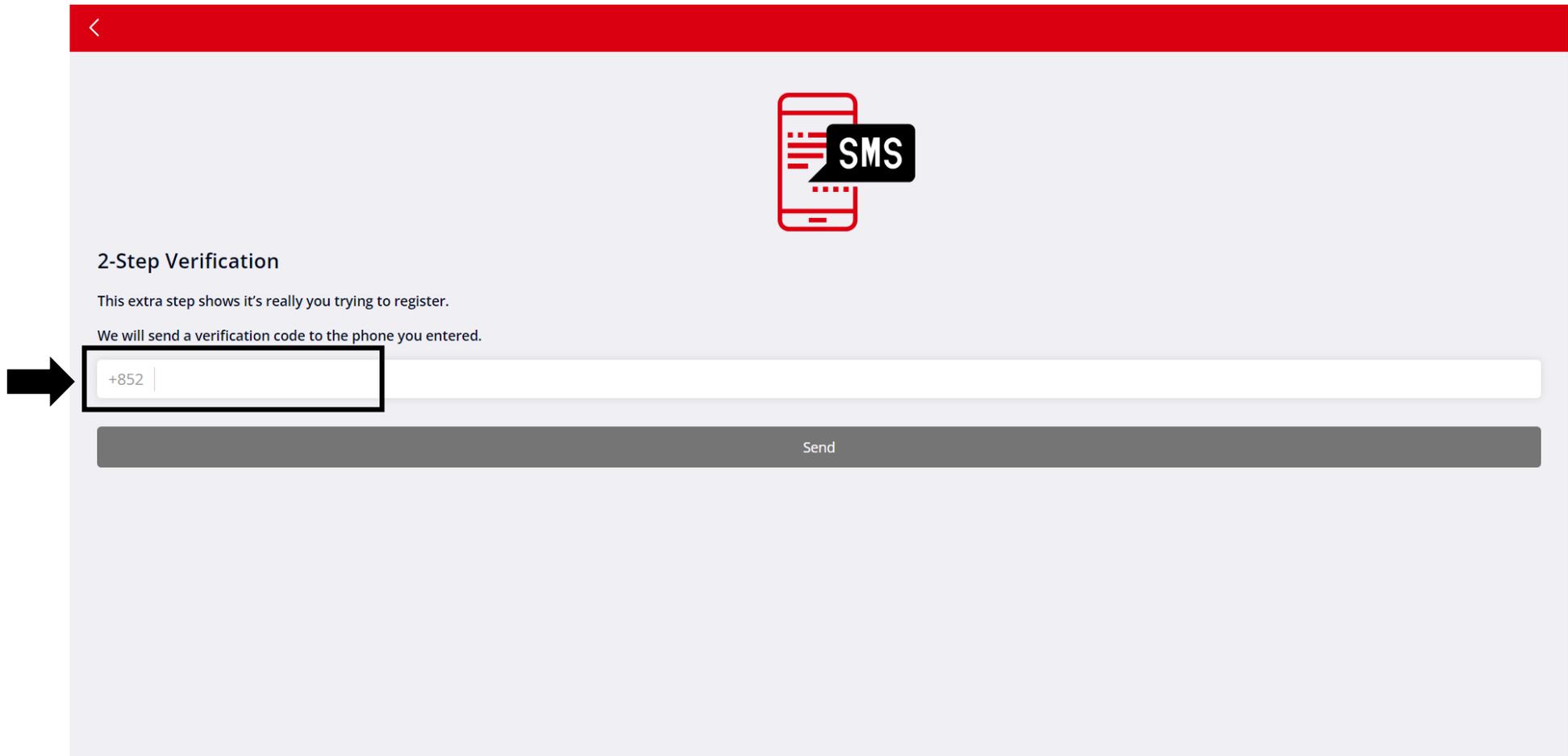
Z123456 7

OK

If the first letter is not entered as an uppercase, a prompt message will appear asking you to check the field and re-enter the information

4. Enter your **mobile no.** to receive the verification code

  the mobile no. must be based in Hong Kong



<



### 2-Step Verification

This extra step shows it's really you trying to register.

We will send a verification code to the phone you entered.

Send

5. Enter the **verification code** sent to you via SMS to complete the registration

<



### 2-Step Verification

A text message with a 6-digit verification code was just sent to 91XXXX22

Didn't get the code? [RESEND IT](#)

Next

**NOTE:**

- ❖ **Your login password will be automatically set as your HKID no. or passport no.** as follows:
  - HKID: Please enter the first letter (in lowercase) and the first 6 digits of your HKID card number e.g. Enter z123456 for HKID no. Z123456(7);
  - Passport: Please enter the first letter (in lowercase) and all the numbers of your passport no.

**B. Fill in MPF enrollment form (IN61)**

Close (X) Help (?) Power



Create MPF Employee Application ← **Click here to go into IN61 Form**

Setting ← **Click here to change password**

<https://hbcistaff.hk/InputForm/NewEnrollment>



Please choose a MPF scheme

IN61 HSBC Mandatory Provident Fund SuperTrust Plus



[Click here](#)



Please choose a MPF scheme

IN61 HSBC Mandatory Provident Fund SuperTrust Plus

**Confirm Your MPF plan**

HSBC Mandatory Provident Fund  
SuperTrust Plus - IN61

Are you sure ?

OK

Cancel



1. Read through all the documents before proceeding

EMPLOYEE APPLICATION FORM

HSBC MANDATORY PROVIDENT FUND - SUPERTRUST PLUS  
EMPLOYEE APPLICATION FORM

1 2 3 4 5

Please read all instructions, declaration and authorisation carefully before completing this form.

Tax Residency Self-Certification

Participation

Personal information collection statement

Please tick if you do not wish your personal data to be used for purpose of conducting direct marketing activities stated in paragraph 5 above.

Others Document

MPF Scheme Brochure for HSBC Mandatory Provident Fund - SuperTrust Plus

On-going cost illustrations

HSBC MPF Overview

I have read through all the above

Next

2. Fill in your personal information (**Fields marked with \* are mandatory**)

 EMPLOYEE APPLICATION FORM

DETAILS OF APPLICANT

**1. Full name in English \***  
same as that shown on your HKID card/Passport

**Surname**

 \*

**Given name**

 \*

**2. Chinese name (if any)**

**3. Previous name**  
(if legal name has been changed within the past 5 years)

**Surname**

**Given name**



#### 4. Identification number

\*  HKID card no.

Z123456 \*

7 \*

Passport no.

(ONLY applicable for person without HKID card, please provide the place of issue)

#### 5. Date of birth \*

If your HKID card only contains the year and you have no other form of identity to prove the exact date of birth (e.g. birth certificate, passport), you should use 31 December as the day and month. Likewise, if your HKID card contains the year and month but not the day, you should use the last day of the month shown. If you leave the day and/or month blank, your date of birth will be regarded as the last day of that month or 31 December.

2000-11-02 \*

YYYY-MM-DD

#### 6. Sex

\*  Male

Female

#### 7. Nationality 1 (Country/Region):

Chinese \*

Multiple nationality (Country/Region)

\*  Yes  No

**NOTE:** For passport holder, please also input “**Place of issue**” of your passport (Please skip this part if you use your HKID no. as identification number)

☰ EMPLOYEE APPLICATION FORM

**4. Identification number**

HKID card no.

**Passport no.**  
(ONLY applicable for person without HKID card, please provide the place of issue)

H9876543210 \*

**Place of issue**

USA \*

**5. Date of birth \***

If your HKID card only contains the year and you have no other form of identity to prove the exact date of birth (e.g. birth certificate, passport), you should use 31 December as the day and month. Likewise, if your HKID card contains the year and month but not the day, you should use the last day of the month shown. If you leave the day and/or month blank, your date of birth will be regarded as the last day of that month or 31 December.

1983-06-18 \*

YYYY-MM-DD

**6. Sex**

**Male**

**Female**

**7. Nationality 1 (Country/Region):**

Hong \*

**Multiple nationality (Country/Region)**



Please provide your correspondence address

☰EMPLOYEE APPLICATION FORM

**8. Residential address**  
(The main address the majority of the time is spent or resided) (in English)

- PO Box address is not accepted
- Correspondence will be sent to this address

<b>Room/Flat</b> <input type="text" value="110"/>	<b>Floor</b> <input type="text" value="1"/>	<b>Block</b> <input type="text"/>
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**Name of building**

**Name of estate**

**Number and name of street/road**

**District/Postal code**  
\*

\*  HK    KLN    NT    Others

**Effective date for residential address**

<input type="text"/>	<input type="text"/>
Year	Month

Please provide your contact number(s)

☰EMPLOYEE APPLICATION FORM

**9. Day time contact no.<sup>1</sup>**

<p>Country/Region code</p> <input style="width: 95%;" type="text"/>	<p>Area code</p> <input style="width: 95%;" type="text"/>
<p>Phone no.</p> <input style="width: 98%;" type="text"/>	

**10. Mobile phone no.<sup>1,2</sup>**

<p>Country/Region code</p> <input style="width: 95%;" type="text"/>	<p>Area code</p> <input style="width: 95%;" type="text"/>
<p>Phone no.</p> <input style="width: 98%;" type="text"/>	

**11. Facsimile no.<sup>1</sup>**

<p>Country/Region code</p> <input style="width: 95%;" type="text"/>	<p>Area code</p> <input style="width: 95%;" type="text"/>
<p>Phone no.</p> <input style="width: 98%;" type="text"/>	

Please select your preferred language for correspondence

☰EMPLOYEE APPLICATION FORM

91203922

**11. Facsimile no.<sup>1</sup>**

Country/Region code  Area code

Phone no.

**12. E-mail address<sup>2</sup>**

**13. Preferred language for correspondence**  
If preferred language is not selected, English will be used for member correspondence.

\*  English  
 Chinese

\* The information is required to be reported by the reporting financial institution to the Inland Revenue Department.

1 If you are providing overseas contact details outside Hong Kong SAR, please also include the correct Country/Region Code and Area Code. However, for overseas mobile numbers, usually there is no need to add an Area Code and you may check with your telecommunications service provider for details.

2 Please provide your personal mobile phone no. and e-mail address which are exclusively for your own use to ensure that your confidential account and transaction related information are delivered to the mobile phone no. and e-mail address which are only accessible by you.

   You cannot go to the next step if you have not filled in all required fields

☰EMPLOYEE APPLICATION FORM

01203922

**11. Facsimile no.<sup>1</sup>**

Country/Region code Area code

Phone no.

**12. E-mail address<sup>2</sup>**

**13. Preferred language for correspondence**

If preferred language is not selected, English will be used for member correspondence.

\*  English

Chinese

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2 Please provide your personal mobile phone no. and e-mail address which are exclusively for your own use to ensure that your confidential account and transaction related information are delivered to the mobile phone no. and e-mail address which are only accessible by you.

Back

Next

**You cannot click the “Next” button if the mandatory fields have not been completed**

3. Choose your investment option (**choose EITHER Default Investment Strategy (DIS) OR Own Investment Option**)

(i) If you select “DIS” – go to “Next”

☰EMPLOYEE APPLICATION FORM

**HSBC MANDATORY PROVIDENT FUND – SUPERTRUST PLUS**  
**EMPLOYEE APPLICATION FORM**

✓ ✓ 3 4 5

**INITIAL INVESTMENT OPTION**

**(I) DIS**  
Your future contributions and accrued benefits transferred from another Registered Scheme<sup>3</sup> will be invested in accordance with the DIS. Please refer to the 'MPF Scheme Brochure' for details.

**(II) Own investment option**  
Please indicate which of the following Constituent Fund(s) you would like your future contributions and accrued benefits transferred from another Registered Scheme<sup>3</sup> under SuperTrust Plus be invested. The investment allocation percentages should be in whole numbers (e.g. 50% not 50.5%) and the total should be 100%. If the total allocation is not 100%, your contributions will be invested in accordance with the DIS.

**(I) DIS**

Name of Constituent Fund	Type of fund	Fund Code
Core Accumulation Fund	Mixed Assets Fund	CAF
Age 65 Plus Fund	Mixed Assets Fund	APF

**Investment allocation percentage**  
**100%**

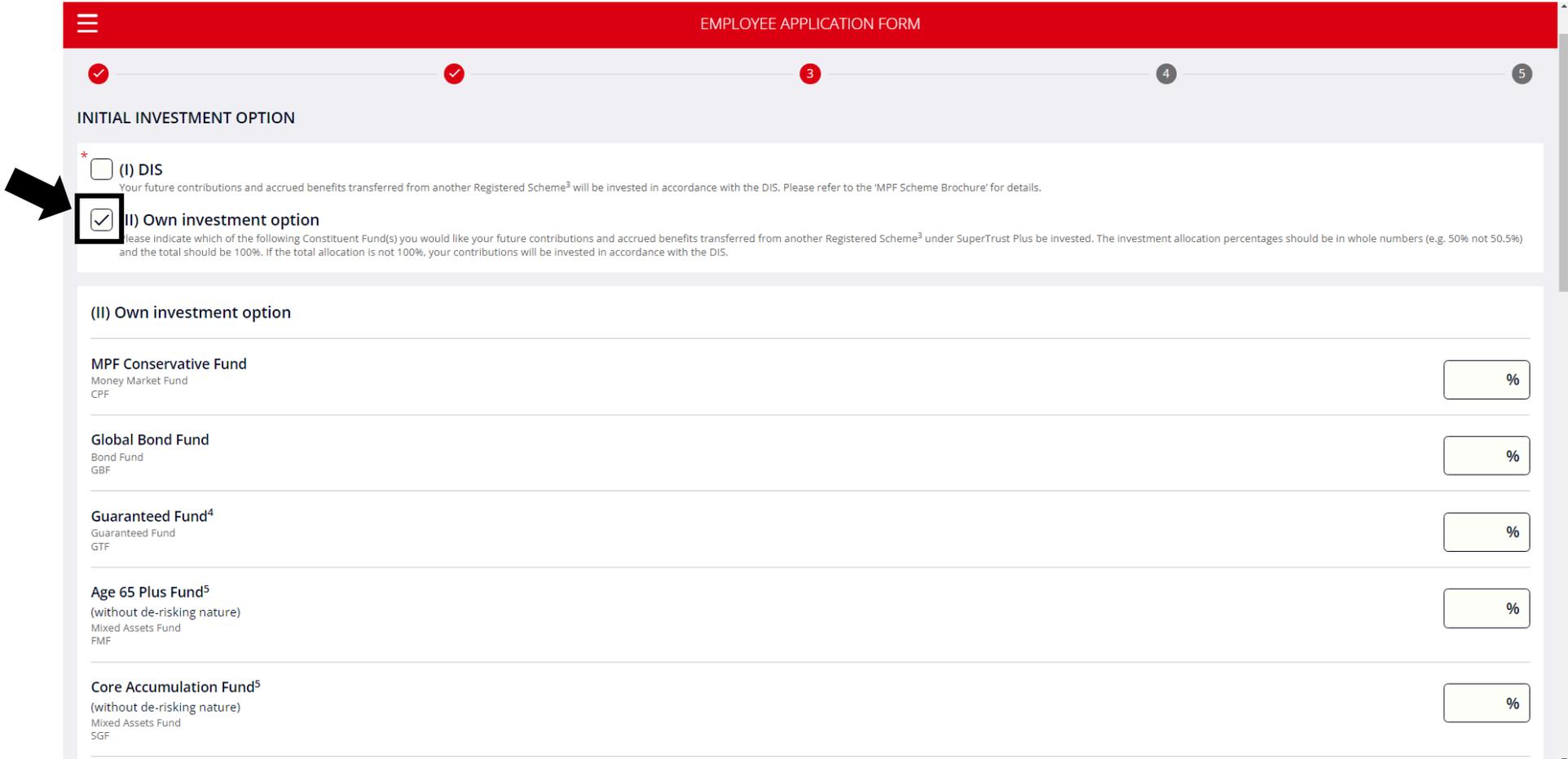
The DIS is invested in the Core Accumulation Fund and the Age 65 Plus Fund according to the pre-set allocation percentages at different ages and will adjust risk by way of reducing the holding in the Core Accumulation Fund and increasing the holding in the Age 65 Plus Fund when the member gets older. For more details on de-risking of the DIS, please refer to the 'MPF Scheme Brochure'.

<sup>3</sup> If the asset is transferred from one account to another account or a personal account within the same HSBC MPF scheme, the fund allocation (i.e. units under respective Constituent Funds) of such asset will remain unchanged until asset switching instruction is received from you.

Back

Next

(ii) If you select “Own investment option” – please input the Investment Allocation Percentages (in whole numbers)



**EMPLOYEE APPLICATION FORM**

1 2 3 4 5

**INITIAL INVESTMENT OPTION**

\*  (I) DIS  
Your future contributions and accrued benefits transferred from another Registered Scheme<sup>3</sup> will be invested in accordance with the DIS. Please refer to the 'MPF Scheme Brochure' for details.

(II) Own investment option  
Please indicate which of the following Constituent Fund(s) you would like your future contributions and accrued benefits transferred from another Registered Scheme<sup>3</sup> under SuperTrust Plus be invested. The investment allocation percentages should be in whole numbers (e.g. 50% not 50.5%) and the total should be 100%. If the total allocation is not 100%, your contributions will be invested in accordance with the DIS.

**(II) Own investment option**

<b>MPF Conservative Fund</b> Money Market Fund CPF	%
<b>Global Bond Fund</b> Bond Fund GBF	%
<b>Guaranteed Fund<sup>4</sup></b> Guaranteed Fund GTF	%
<b>Age 65 Plus Fund<sup>5</sup></b> (without de-risking nature) Mixed Assets Fund FMF	%
<b>Core Accumulation Fund<sup>5</sup></b> (without de-risking nature) Mixed Assets Fund SGF	%



<b>ValueChoice Balanced Fund</b> Mixed Assets Fund VBLF	<input type="text" value=""/>
<b>ValueChoice North America Equity Tracker Fund</b> Equity Fund VUEF	<input type="text" value=""/>
<b>ValueChoice Europe Equity Tracker Fund</b> Equity Fund VEEF	<input type="text" value=""/>
<b>ValueChoice Asia Pacific Equity Tracker Fund</b> Equity Fund VAEF	<input type="text" value="32 %"/>
<b>Hang Seng China Enterprises Index Tracking Fund</b> Equity Fund HSHF	<input type="text" value="11 %"/>
<b>Hang Seng Index Tracking Fund</b> Equity Fund HSIF	<input type="text" value="57 %"/>
<b>Total</b>	<b>100 % / 100%</b>

Each Investment Allocation % must be a whole number



Total sum must be 100%



<sup>3</sup> If the asset is transferred from one account to another account or a personal account within the same HSBC MPF scheme, the fund allocation (i.e. units under respective Constituent Funds) of such asset will remain unchanged until asset switching instruction is received from you.  
<sup>4</sup> For information about the Guaranteed Interest Rate, please visit [www.hsbc.com.hk/mpf](http://www.hsbc.com.hk/mpf) or call our Customer Service Representative on 3128 0128.  
<sup>5</sup> If you choose to invest in the Core Accumulation Fund and/or the Age 65 Plus Fund (as a standalone investment fund rather than as part of the DIS), those investments will not be subject to the de-risking process.

Back

 **Next**

4. Complete the “Tax Residency Self-Certification” section (**mandatory**)
- (i) If you choose “Yes” (i.e. tax resident in Hong Kong only), go to “Next”

EMPLOYEE APPLICATION FORM

HSBC MANDATORY PROVIDENT FUND – SUPERTRUST PLUS  
EMPLOYEE APPLICATION FORM

TAX RESIDENCY SELF-CERTIFICATION (MANDATORY)

This section should be completed by account holder

The below tick box is only for if the account holder's Tax Residency Self-Certification is completed by employer, otherwise, please leave it blank\*

(i) the employer is authorised by the account holder identified in Section A of Part I of this form; (ii) the account holder is unable to complete this form due to exceptional circumstance; (iii) the Tax Residency Self-Certification information is provided by the account holder.

(1) The Tax Residence of account holder is Hong Kong ONLY, with no tax residence in any other jurisdictions/countries/regions AND the HKID number is his/her TIN.

Yes - you may skip (2)

No - please complete (2)

\* Please note that

i. pre-approval is required before you complete this section on behalf of the account holder identified in Section A of Part I of this form. If you have any questions about this, please call our MPF hotline 2583 8033 (Employer).

ii. the below information about the account holder's Tax Residency Self-Certification you completed must be provided by the account holder identified in Section A of Part I of this form.

iii. the Trustee may request you to provide the original copy of documentary evidence with authorisation by the account holder identified in Section A of Part I of this form if necessary.

iv. if there are changes in the information, please remind the account holder to update the Trustee within 30 days of such change in circumstances.

Back

Next

(ii) If you choose “No”, please continue to complete part (2)

**NOTE:**

- ❖ Please provide the TIN, which is a unique tax identifier, typically made up of letters and numbers, that is assigned to an account holder by their specific tax jurisdiction
- ❖ If a TIN is not available, please provide the appropriate reason

EMPLOYEE APPLICATION FORM

(1) The Tax Residence of account holder is Hong Kong ONLY, with no tax residence in any other jurisdictions/countries/regions AND the HKID number is his/her TIN.

\*  Yes - you may skip (2)  
 No - please complete (2)

(2) Complete the following table indicating

(a) all jurisdictions where the account holder is a resident for tax purposes; and  
(b) the account holder's TIN for each jurisdiction indicated.

If the account holder is a tax resident of Hong Kong, the TIN is the Hong Kong Identity Card Number (HKID).  
If a TIN is unavailable, provide the appropriate reason A, B or C

# Reason A - The jurisdiction where the account holder is a resident for tax purposes does not issue TINs to its residents.  
Reason B - The account holder is unable to obtain a TIN. Explain why the account holder is unable to obtain a TIN if you have selected this reason.  
Reason C - TIN is not required. Select this reason only if the authorities of the jurisdiction of tax residence do not require the TIN to be disclosed.

1. Jurisdiction of Tax Residence *	TIN *	# Enter Reason A, B or C if no TIN is available
United States of America 美國	1234567	

+ Add Jurisdiction of Tax Residence (Max 5)

\* Please note that

- pre-approval is required before you complete this section on behalf of the account holder identified in Section A of Part I of this form. If you have any questions about this, please call our MPF hotline 2583 8033 (Employer).
- the below information about the account holder's Tax Residence Self-Certification you completed must be provided by the account holder identified in Section A of Part I of this form.
- the Trustee may request you to provide the original copy of documentary evidence with authorisation by the account holder identified in Section A of Part I of this form if necessary.
- if there are changes in the information, please remind the account holder to update the Trustee within 30 days of such change in circumstances.

Back Next

5. Sign the form and click “Preview”

EMPLOYEE APPLICATION FORM

HSBC MANDATORY PROVIDENT FUND – SUPERTRUST PLUS  
EMPLOYEE APPLICATION FORM

✓ ✓ ✓ ✓ 5

Signature of employee [Clear](#)



A screenshot of an online form titled "EMPLOYEE APPLICATION FORM" for the "HSBC MANDATORY PROVIDENT FUND – SUPERTRUST PLUS". The form has a progress bar at the top with five steps, all marked with red checkmarks. The fifth step is highlighted with a red circle containing the number "5". Below the progress bar, the text "Signature of employee" is followed by a "Clear" link. A large white box contains a handwritten signature in black ink. The signature is cursive and appears to be "Chin".



*Handwritten signature: Ctm*

X

Full name

Chan Tai Man

Date

2023-11-03

Back



Preview

6. Preview the form – Ensure all fields are filled out correctly before pressing “Submit”

EMPLOYEE APPLICATION FORM

HSBC MANDATORY PROVIDENT FUND – SUPERTRUST PLUS  
EMPLOYEE APPLICATION FORM

Please carefully check the contents of the form, and finally "Submit"

Starting from 1 January 2020, HSBC Mandatory Provident Fund – SuperTrust Plus becomes reporting financial institution under Inland Revenue Ordinance (Cap. 112) ("the Ordinance"). To comply with the Ordinance, please provide and confirm to us your tax residency information through the relevant new application form embedded with the Tax Residency Self-Certification for MPF scheme/account enrolled on or after 1 January 2020. Otherwise, the enrollment process for MPF scheme/account will be adversely affected and could not be completed. 由2020年1月1日開始，滙豐強積金智選計劃成為在《稅務條例》(第112章)〔條例〕下的申報金融機構。為遵守條例，請於2020年1月1日或以後透過載有稅務居民自我證明的相關新申請表格向我們提供及確認你的稅務居民資料以參加強積金計劃／賬戶。否則參加強積金計劃／賬戶的程序將受到影響及無法完成。

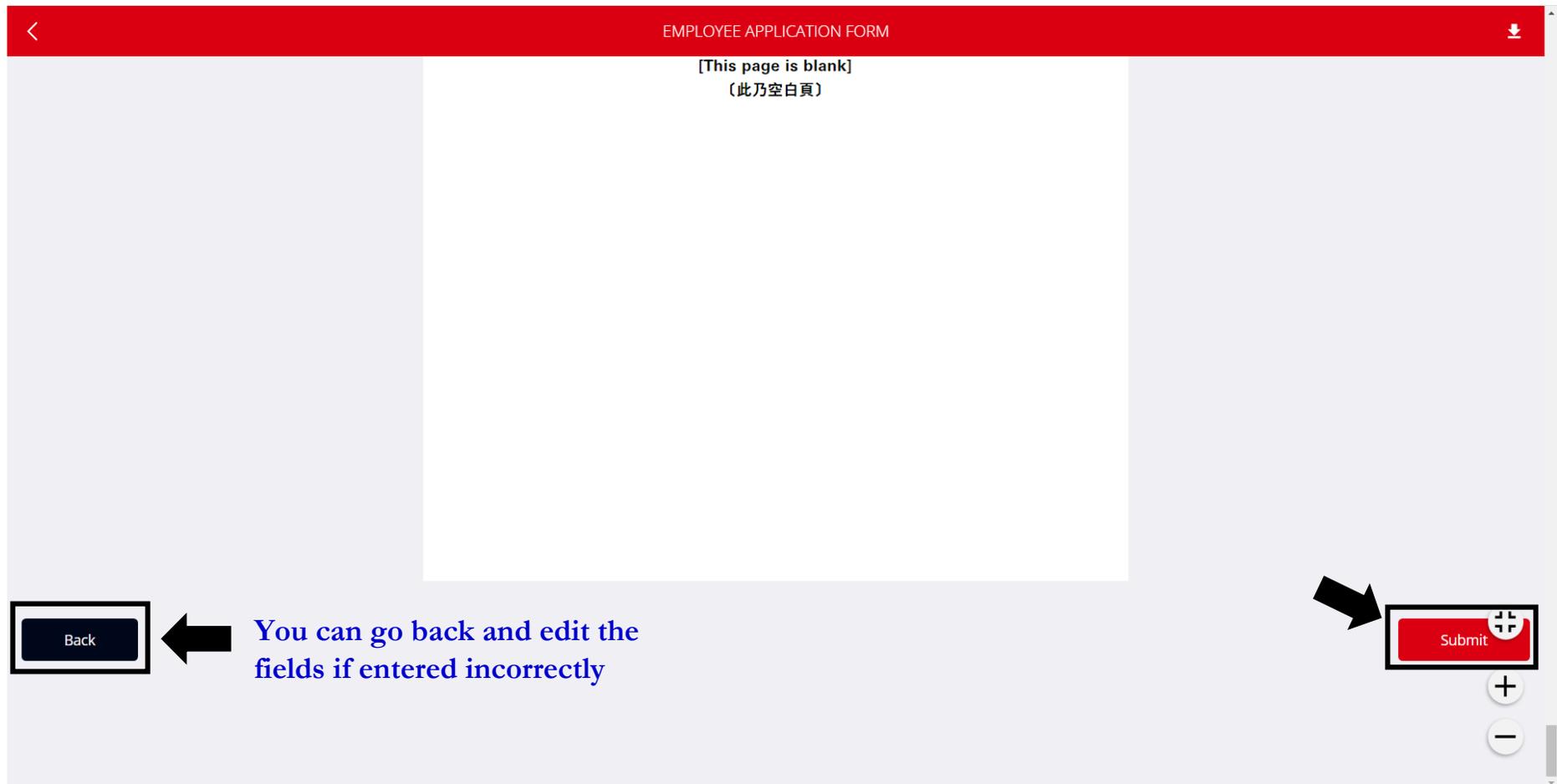
  
IN61

**To 致: HSBC Provident Fund Trustee (Hong Kong) Limited**  
c/o The Hongkong and Shanghai Banking Corporation Limited 香港上海滙豐銀行有限公司  
PO Box 73770 Kowloon Central Post Office 九龍中央郵政信箱73770號  
或投放於指定滙豐分行的強積金寄件櫃  
HSBC MPF Employer Hotline 滙豐強積金僱主熱線: 2583 8033  
HSBC MPF Member Hotline 滙豐強積金成員熱線: 3128 0128

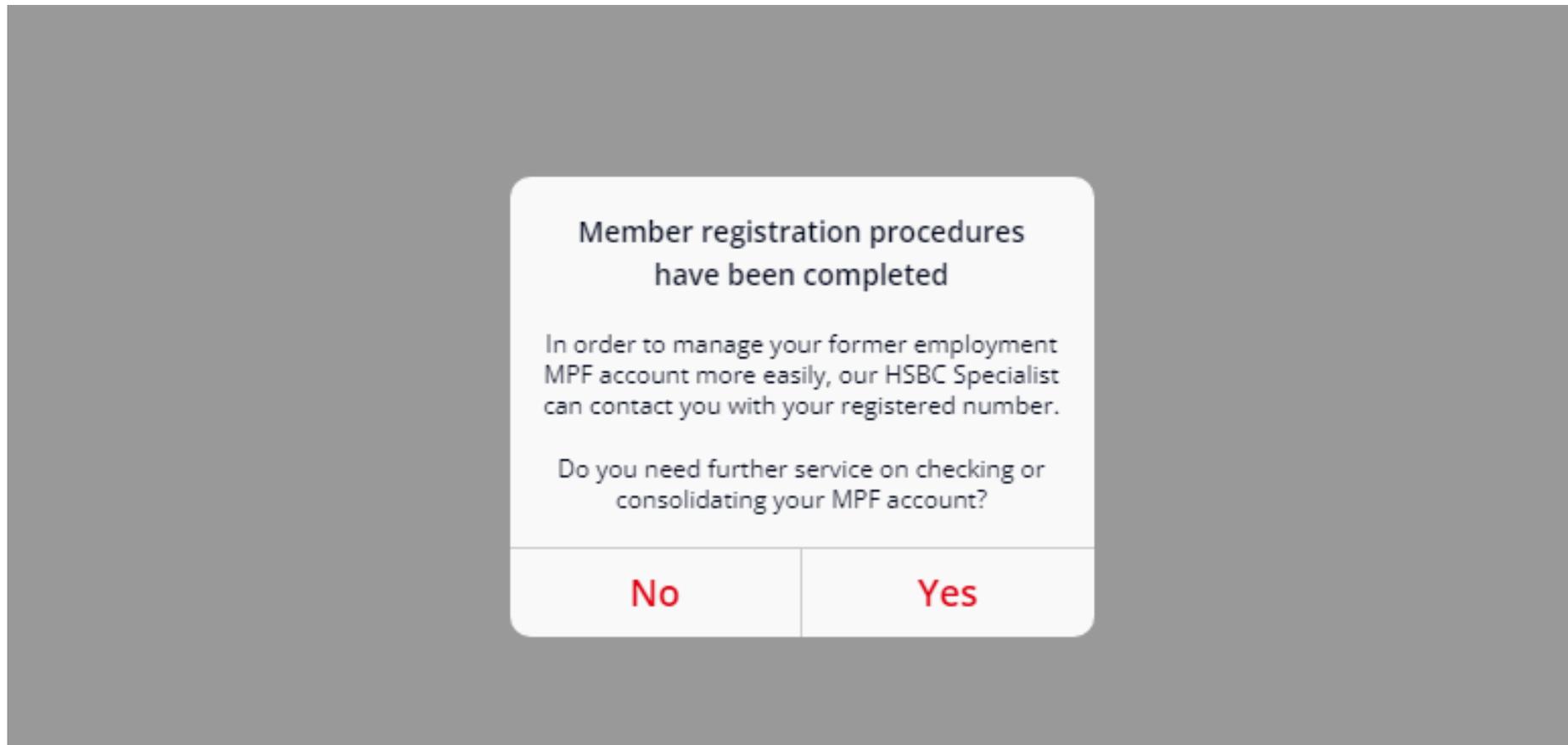
**HSBC MANDATORY PROVIDENT FUND – SUPERTRUST PLUS  
EMPLOYEE APPLICATION FORM  
滙豐強積金智選計劃：僱員申請表**

**Note 注意：**

- Please complete in CAPITAL and BLOCK LETTERS and tick ✓ the appropriate box(es). 請用大楷及正楷填寫，並於適當的方格內加上「✓」號。
- This application is issued in conjunction with the MPF Scheme Brochure. 本申請表必須與強積金計劃說明書一同提交。
- To change your identification number, please provide written notice together with a copy of supporting document to us and inform your employer immediately for updating such record on MPF contribution issue. 如欲更改你的身分證明文件號碼，請向我們提供書面通知及身分證明文件副本，並請立即通知你的僱主於強積金供款事宜上更新有關紀錄。
- Please note that if you wish to register for HSBC Internet Banking in future (this service is not available for passport holder with passport number more than 12 digits), you should provide both your address in English and mobile phone number in this form. 請注意：如欲日後登記使用滙豐網上理財(此服務不適用於護照號碼超過12位數字的護照持有人)，你須在本表格同時提供英文地址及流動電話號碼。
- The information (including any blank field) that you provided in Section A of this form will automatically apply to ALL your accounts maintained with HSBC MPF under the HKID/Passport number stated in Section A4 below. If you wish to change your personal details for a specific account, please complete the "Personal Details Change Form" (IN91). If you wish to change your personal details for non-HSBC MPF account (e.g. HSBC Banking Service), please submit a relevant change form or you can change your personal details for your HSBC accounts via the HSBC Personal Internet Banking at [www.hsbc.com.hk](http://www.hsbc.com.hk). 你於本表格A部所填寫的資料(包括任何留空部分)將自動適用於你以下述A部第4項之香港身分證/護照號碼登記的所有滙豐強積金賬戶。如你欲更改指定賬戶的個人資料，請填寫更改個人資料表格(IN91)。如你欲更改非滙豐強積金賬戶(例如滙豐銀行服務)的個人資料，請提交有關更改表格，或可透過[www.hsbc.com.hk](http://www.hsbc.com.hk)的滙豐個人網上理財更改你的滙豐賬戶個人資料。
- The Default Investment Strategy ("DIS") is a ready-made investment arrangement mainly designed for those members who are not interested or do not wish to make an investment choice, and is also available as an investment choice itself, for members who find it suitable for their own circumstances. For those members who do not make an investment choice, their future contributions and accrued benefits transferred from another Registered Scheme will be invested in accordance with the DIS. The DIS aims to balance the long term effects of risk and return through investing in two Constituent Funds, namely the Core Accumulation Fund and the Age 65 Plus Fund, according to the pre-set allocation percentages at different ages. The DIS will manage investment risk exposure by automatically reducing the exposure to higher risk assets and correspondingly increasing the exposure to lower risk assets as the member gets older. For further details of the DIS, please refer to the relevant "MPF Scheme Brochure"/「預設投資策略」。預設投資策略，主要是為沒有興趣或不打算作出投資選擇的計劃成員而設計。而對於認為適合自身情況的成員來說，「預設投資策略」本身亦可作為一項投資選擇。計劃成員如沒有作出投資選擇，其未來供款及轉移自另一註冊計劃的累積權益將會按照「預設投資策略」來作出投資。「預設投資策略」透過於不同年齡按照預定配置百分比投資於兩項成分基金(即核心累積基金與65歲後基金)，旨在平衡長期風險與回報。「預設投資策略」將會隨著成員年齡增長而自動減少投資於較高風險資產，並相應增加投資於較低風險資產。藉此管理投資風險。有關「預設投資策略」的詳情，請參閱有關「強積金計劃說明書」。
- "Registered Scheme" means a retirement benefits scheme registered under section 21 or 21A of the "MPF Ordinance". 「註冊計劃」指已根據《強積金條例》第21條或第21A條註冊的退休福利計劃。



The Human Resources Office will receive the form once it has been submitted.



The above message will appear after successful submission of the form.

If you would like to consolidate your MPF accounts, please select “Yes” and a HSBC MPF Specialist will contact you directly for follow up.