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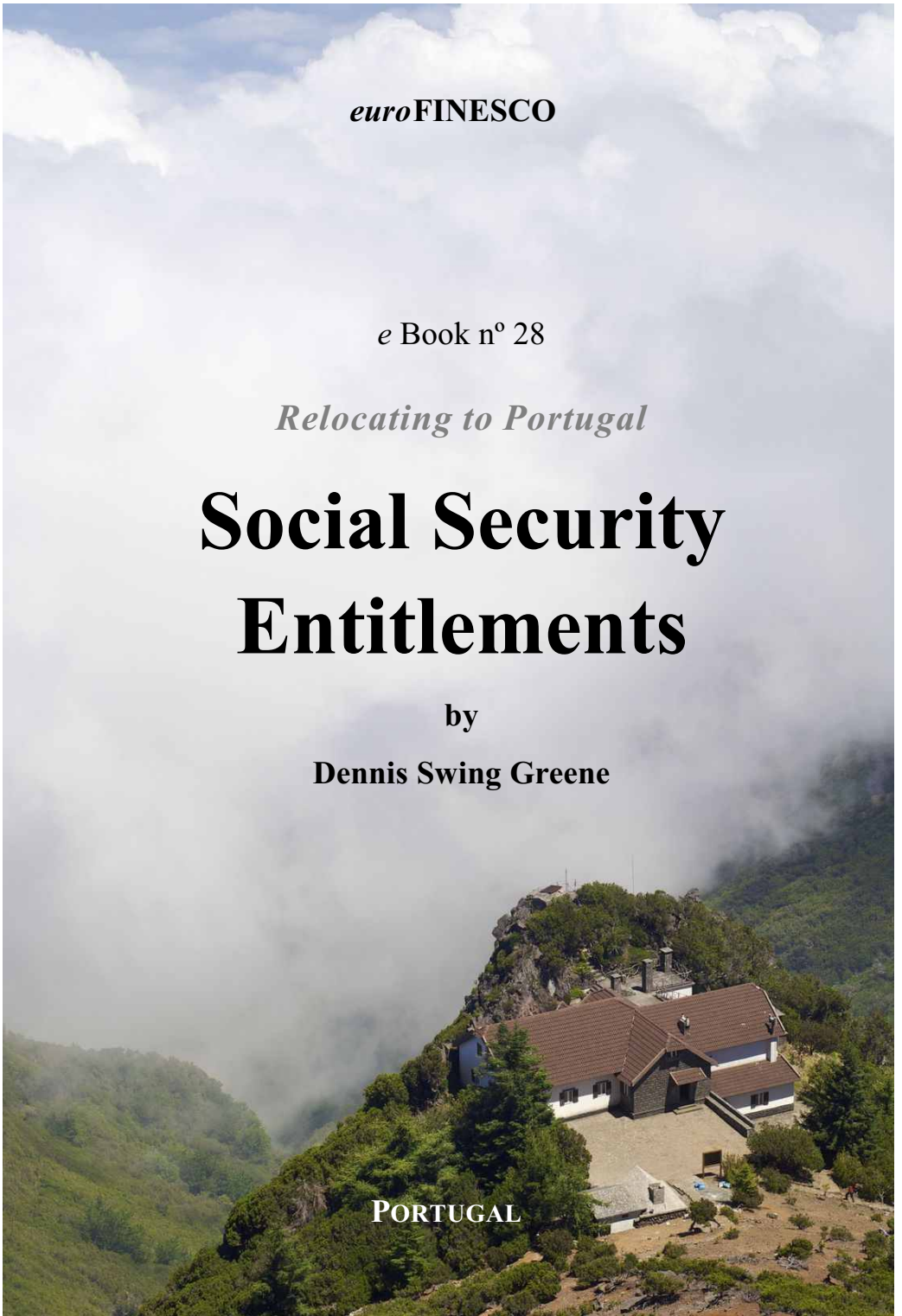
*Relocating to Portugal*

# Social Security Entitlements

by

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**PORTUGAL**



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***Note from the author***

This eBook is an extract of the complete work  
**“Relocating to Portugal - Useful Information”**

Other chapters include:

- Visas and Legal Framework
- Marriage and Cohabitation
- Your Rights to Medical Care
- Access to Education
- Recognition of Skills and Qualifications
- Social Security Entitlements
- Acquiring Portuguese Citizenship
- Portuguese Tax Codes
- Golden Residence Permit

Copies are available through the offices of *euroFINESCO*



## I. INTRODUCTION

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Under the Constitution of the Portuguese Republic, the Social Security System guarantees welfare cover for all nationals. The main objectives of the Framework Law (Law N° 4/2007, of 16 January) are:

- To ensure the right to Social Security is implemented;
- To promote the sustained improvement of the conditions and levels of welfare protection whilst reinforcing the principles of equity;
- To promote the effectiveness of the system and efficiency of its management.

Foreign nationals who work and reside legally in Portugal, along with their families and heirs, are subject to the same rights and obligations as Portuguese nationals. However, the payment of certain benefits to foreign residents on the basis of international Social Security instruments may depend on the verification of certain conditions, namely minimum periods of residence.

As nationals of a State to whom Portugal is bound through an international Social Security instrument, they may be entitled, for example, to the sum of all contributions made, as verified in that State and in Portugal, and consequently, to certain Social Security payments when otherwise, those periods if considered individually, would not confer any rights. The aim of this chapter is to provide general but clear information to immigrants about their rights and obligations under the Social Security system.

The information given here cannot cover all situations or answer questions in relation to specific cases. For further information, please see the list of contacts of the relevant bodies. It should be noted that the information given in this chapter may become out of date as various new legislative measures come into force.



## II. REGISTERING WITH SOCIAL SECURITY

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Registration of workers in Social Security is for life and ensures:

- Coverage under the Social Security system;
- The assignment of a Social Security Identification Number (NISS);
- The issue of a Social Security Card.

If the Social Security Office does not provide you with the Social Security Identification Number (NISS), you can request a NISS number for a Natural Person or a Legal Person at [www.seg-social.pt](http://www.seg-social.pt) by selecting *Serviços* (Services)/ *em linha* (on-line).

### **General Social Security Scheme for Employees**

This scheme covers benefits for employees and those legally recognised as such.

#### ***Who should register?***

It is the duty of the employer to register employees starting employment in their service. The registration takes effect from the 1st day of the month in which the employment starts. Compulsory Declaration regarding the commencement of employment of new employees (1)

The employer must:

- Inform the relevant Social Security office in writing of the commencement of any new employees, when the employment contract first takes effect; or
- Provide the same information through the Internet, at [www.seg-social.pt](http://www.seg-social.pt), using the Online Social Security Service (*Segurança Social Directa*);
- Supply the new employees with a statement specifying the commencement date and the employer's Social Security identification number (NISS) and tax number (NIF).

Workers should also inform the relevant Social Security office in writing of the start of their professional activity or the commencement of their work with a new employer. Failure to communicate this may result in lack of access to welfare cover.

### **General Social Security Scheme for the Self-Employed**

Workers who initiate an activity as self-employed persons are required to join the scheme and/or register at the Social Security office, if they have not already done so. As from 1 March 2007, self-employed persons are no longer required to inform the Social Security office of the start, suspension or termination of their professional or business activity; this information will be officially communicated to the Social Security Institute (Instituto da Segurança Social, I.P.) by the Portuguese Tax Authorities.

This procedure does not dispense with the duty of persons to supply the Social Security office with any information necessary to prove particular situations in cases where such information cannot be officially obtained or where questions have been raised – Regulation n° 121/2007, of 25 January. (2)

#### ***What is the procedure for registering workers?***

The following indicates the procedure for registering workers in Social Security.

**When:** Until the end of the month following the month when the activity started.

- Until the 15<sup>th</sup> of the month that is 13 months after the month when the activity started for workers that fall within a compulsory scheme (1st scheme).
- Until the 15<sup>th</sup> of the 2nd month following the month when the activity started, for workers already within a scheme who re-start an activity as a self-employed person.

**Where:** The Social Security Office that covers the place of work for employees or area of residence for the self-employed.

**How:**

- Until the 15<sup>th</sup> day of the month that is 13 months after the month when the activity started, for workers that fall within a compulsory scheme (1st scheme).
- Until the 15<sup>th</sup> day of the 2nd month following the month when the activity started, for workers already within a scheme who re-start an activity as a self-employed person.
- Identification Form and, in the case of foreign workers, a Supplementary Identification Form (standard forms), along with the Work Visa or the authorisation to reside or stay.
- Identity Card (or Birth Certificate or Passport) and also:

**Necessary Documents****As an Employee**

- Social Security Identity Card if already registered;
- Natural Person Tax Identity Card;
- For employees carrying out domestic duties, Identity Card & Natural Person Tax Identity Card of the employer;
- For a foreign worker, Supplementary Identification Form, using standard Form RV1006-DGSS.

**As a Self-Employed Person**

- Declaration of commencement of activity for tax purposes;
- Social Security Beneficiary Card, if already registered;
- Natural or Legal Person Tax identity card in the case of self-employed persons carrying on a business.





### III. SOCIAL SECURITY CONTRIBUTIONS

#### General Social Security Scheme for Employees

Contribution Amounts Contributions for most employees are calculated at the rate of 34.75% on income payments, with:

- 11% being paid by the employee and
- 23.75% being paid by the employer.

Contributions to be made by employees are deducted from income payments and paid to Social Security by the employer. In the case of employees in domestic service, contributions are calculated at the rate of 26.7%, with 17.4% being paid by the employer and 9.3% being paid by the employee.

This contribution rate is applied to a standard income, known as the base value for contributions, and being 70% of the Social Support Index (IAS) (Law n° 53-B/2006 of 29 December (3)).

For the purposes of making payment contributions, the monthly, daily and hourly amounts are calculated on the amount that constitutes the base value, in accordance with the following table:

Amount	Calculation of Amount/base value
Monthly	$(IAS \times 70\%)$
Daily	$(IAS \times 70\%):30$
Hourly	$(IAS \times 70\% \times 12):(52 \times 40)$

#### Payment of Contributions

The payment of contributions in respect of employees is the responsibility of the employer. Contributions must be paid monthly between the 1<sup>st</sup> and the 20<sup>th</sup> of the month following the month to which the payments refer.

## General Social Security Scheme for the Self-employed

The amount of the contribution depends on the person's choice of protection scheme, since this scheme allows for a compulsory protection scheme (more restrictive) and an extended protection scheme. The amount (the base value for contributions) is chosen from 10 scales indexed to the Social Support index (IAS) (€419.22).

Scales	
1°	1 X IAS
2°	1,5 X IAS
3°	2 X IAS
4°	2,5 X IAS
5°	3 X IAS
6°	4 X IAS
7°	5 X IAS
8°	6 X IAS
9°	8 X IAS
10°	10 X IAS
11°	12 X IAS

The rates applicable to the amount chosen are the following:

- Independent Workers – 29.6%
- Independent Professionals – 34,75%

### Payment of Contributions

Contributions of self-employed persons must be paid monthly between the 1st and the 15<sup>th</sup> of the month following the month to which the payments refer.



## IV. SOCIAL SECURITY COVERAGE

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The Social Security system affords protection in sickness, old age, invalidity, death, widowhood and orphanhood, as well as unemployment and any situation which involves a lack of or reduction in the means of subsistence or incapacity for work. It includes the Provident Scheme, the Citizenship Social Protection Scheme and the Supplementary Scheme.

### **Benefits**

Social Security benefits are granted as a right under the State's Social Security System, and are designed to protect workers, families and persons in situations involving a lack of or reduction in the means of subsistence.(4)

These payments are granted in situations involving family obligations, sickness, maternity, paternity and adoption, unemployment, accidents at work and occupational disease, invalidity, old age and death and also in situations of disability, dependency and social and financial hardship.

### **Family Allowances**

These payments are intended to help with the running costs of maintaining a family.

### **Family Allowance for Children and Young Persons:**

Monthly, to children and young persons, as is their right, to assist with costs to the family of their maintenance and education.

- Until 16 years of age;
- From 16 to 24 years of age, provided they are studying at the levels of education provided for by law, or courses legally recognised as comparable.(5)

- Until 24 years of age, if disabled, with the right to disability benefits. This period can be extended for another three years, if they are studying at a higher education institution, or a comparable course or carrying out course-related work experience essential to the award of their degree.

### **Pre-natal Family Allowance and Additional Family Allowance:**

Pre-natal Family Allowance is paid monthly to pregnant women from the 13th week of gestation up until and including the month of birth. When a second and any subsequent child is born or joins the same household, additional family allowance is paid monthly to all children between 12 and 36 months of age.

### **Funeral Allowance**

A one-off payment given to persons presenting documented evidence of funeral expenses.

#### ***Who is covered***

The persons entitled to family allowances are Portuguese and foreign nationals, refugees and stateless persons, residing in Portuguese territory or in an equivalent situation, provided they meet the general and specific conditions for the grant of those benefits.

## Unemployment benefits

Unemployment benefits are paid as compensation for loss of income due to involuntary unemployment.

<b>Benefits</b>	<b>Monthly payments for fixed periods</b>
Unemployment Benefits	For persons who are involuntarily unemployed provided they meet the required conditions including the qualifying period.
Extended Unemployment Benefits(6)	For persons: Who do not meet the qualifying period for access to Unemployment Benefits. In this case, the qualifying period is shorter; In respect of whom the period for payment of benefits has ended but the state of unemployment continues.
Partial Unemployment Benefits	For person who are receiving Unemployment Benefits and who enter into a contract for part-time work provided they meet the required conditions.

### *Who is covered*

Beneficiaries under the general Social Security scheme, namely employees who are legally resident in Portuguese territory and persons on invalidity pensions, who are not working but are considered capable of working.

## Sickness Benefits

Sickness benefits are paid as compensation for loss of income resulting from temporary incapacity for work due to sickness.

Benefits	Payments made
Sickness Benefits	In situations involving temporary incapacity for work due to sickness, provided the incapacity is certified by a competent authority of the National Health service, and provided the applicant meets the conditions required for the grant of the benefit. The benefit is paid monthly for a limited period of time.(7)
Compensation benefits	Following an illness in respect of which benefits were paid, where the beneficiary has no right to and has not been paid holiday, Christmas and other similar benefits by the employer.

### *Who is covered*

Beneficiaries under the general Social Security scheme, namely employees, self-employed persons who are obliged to be registered under the extended scheme, as well as some beneficiary groups under the voluntary Social Security scheme (maritime workers and watchmen on ships owned by foreign companies and persons receiving academic research scholarships).

Persons receiving academic research scholarships under the voluntary Social Security scheme, as well as domestic workers covered by the general Social Security scheme for employees, are entitled to sickness benefits under the same conditions as self-employed persons.

## Maternity, Paternity and Adoption Benefits

The benefits listed below are paid as compensation for loss of income due to pregnancy, maternity, paternity, adoption, caring for minor children (or the legal equivalent) who are sick and caring for children, the disabled (or the legal equivalent) or chronically ill persons.

Benefits (Allowances)	Payments made
Maternity	To the mother during maternity leave – 120 consecutive days (90 following the birth). The leave may be for 150 consecutive days, if the mother so chooses, with the additional period taken after the birth.
Paternity	To the father, for paternity leave of 10 working days, five after the birth and the other five within 30 days following birth, or during the period when the father substitutes the mother as caregiver of the newborn due to incapacity or death of the mother or by joint decision of both parents.
Adoption	To a person adopting a child under 15 years of age, for a period of 120 days immediately following the granting of responsibility for the minor.
Parental Leave	To the father, for the first 15 days (consecutive) of parental leave, if this follows immediately after the maternity or paternity leave.
Special Leave for Grandparents	To the grandparents, for 30 consecutive days, in case of children born to parents aged less than 16 years, who live with the grandparents and provided the spouse of the beneficiary works or is physically or psychologically unable to look after the grandchild or does not live under the same roof.

<p>Specific Risks</p>	<p>To women who are pregnant, who have recently given birth or are breastfeeding, and are subject to specific risks connected with work conditions, for the period during which it is necessary to avoid exposure to such risks.</p>
<p>Allowances in cases of Illness of Descendants who are Minors or Disabled</p>	<p>For a period of 30 days each calendar year, per descendant, to persons unable to work because they have to minister urgent and essential help, due to sickness or accident, to children, stepchildren or adopted children, who are less than 10 years of age (or any age in the case of disabled persons), and who live with them and form part of their household.</p>
<p>Allowances in cases of severely disabled and chronically ill persons.</p>	<p>To persons unable to work because they have to care for severely disabled or chronically ill children, stepchildren or adopted children, who are less than 12 years of age and who live with them and form part of their household. Duration: six months renewable for up to four years, in the first 12 years of age.</p>

***Who is covered***

Beneficiaries under the general Social Security scheme, namely employees, and self-employed persons who have opted or obliged for the extended scheme (10), as well as some beneficiary groups under the voluntary Social Security scheme (maritime workers and watchmen on ships owned by foreign companies and persons receiving academic research scholarships).



## **Occupational diseases**

The diseases considered occupational diseases are those that appear on the occupational diseases list, as well as any injury or functional disorder or disease that is not on the list but which is an inevitable and direct consequence of an activity carried out by workers and which does not result from the normal ageing process of the body.

### ***How are incapacities certified?***

Certifying incapacity involves:

- diagnosing the disease
- characterising it as a professional disease
- determining the degree of incapacity

### ***Who is covered?***

- Employees, including apprentices, probationers, trainees and persons involved in activities considered as on-the-job training.
- Self-employed persons;
- Foreign nationals working in Portugal.

### ***Who is entitled to compensation?***

The right to compensation is granted to persons who:

- have an occupational disease;
- have been exposed to risk due to the nature of the industry or activity or the usual conditions, environment and practices of the work.

### ***What are the entitlements?***

Cash benefits

- benefits for temporary incapacity;
- provisional pension;
- lump sum and pensions for permanent incapacity;
- benefits for high levels of permanent incapacity;
- death benefits and funeral expenses;
- death pension;

- additional pension allowances;
- additional payments in the months of July and December;
- accommodation modifications allowance;
- training allowance to attend professional courses.

### **Benefits in kind**

- medical and surgical care;
- help with medication and drugs;
- diagnosis and treatment;
- home visits;
- supply, replacement and repair of prostheses and orthoses;
- nursing care;
- hospitalisation and health cures;
- recovery and rehabilitation services or vocational training;
- refund of travel, food and accommodation expenses.

### **Other Rights**

Permanent incapacity pensions are increased by 20% for pensioners who satisfy the following conditions:

- they have stopped working;
- they are affected by pneumoconiosis with a degree of permanent incapacity not less than 50% and where the devaluation coefficient specified in the X-rays is 10% and they are 50 years of age or more;
- they are affected by an occupational disease with a degree of permanent incapacity not less than 70% and they are 50 years of age or more;
- they are affected by an occupational disease with a degree of permanent incapacity not less than 80% , irrespective of age;
- Exemption from payment for consultations in health care units, as well as from co-payments for radiotherapy and physical medicine and rehabilitation, for pensioners with an overall degree of permanent incapacity not less than 50%.

### ***Which documents must be submitted?***

- Compulsory declaration.
- Application for occupational disease benefits, accompanied by information from the family doctor (GP) or medical assistant, or the medical doctor of the employer.
- Diagnostic results (e.g. x-rays, audiogram).
- Health Data (the relevant forms can be downloaded from [www.seg-social.pt](http://www.seg-social.pt)).

### ***Where should I send the documents?***

Directly to the National Centre for Protection against Occupational Risks (*Centro Nacional de Protecção contra os Riscos Profissionais*) or to any office of the District Centre for Solidarity and Social Security (*Centro Distrital de Solidariedade e Segurança Social*) in the person's area of residence.

## Invalidity Pension

An invalidity pension is designed to compensate for loss of income due to permanent incapacity for work.

Benefits (13)	Payments made
Invalidity pension	To persons who have permanent incapacity to carry out their occupation (due to non-work related reasons), as verified by the Incapacity Verification System, provided they satisfy the qualifying period.

### *Who is covered*

Beneficiaries under the general Social Security scheme, namely employees, and self-employed persons, as well as beneficiaries under the Voluntary Social Security scheme

## Old Age Pension

Old-age pensions are granted to persons who have reached the legally required minimum age.

Benefits	Payments made
Old-age Pension	To persons 65 years of age who satisfy the qualifying period.

Persons on invalidity and old-age pensions may also be granted the Dependant Allowance (15).

### *Who is covered*

Beneficiaries under the general social security scheme, namely employees, and self-employed persons, as well as beneficiaries under the voluntary Social Security scheme.

## Death Benefits

These payments aim to provide financial assistance to the family of a deceased beneficiary.

<b>Benefits</b>	<b>Payments made</b>
Survivor's Pension	To the following family members of the deceased beneficiary (provided the latter met the qualifying period): Spouse and ex-spouses; a person who lived with the deceased for more than two years as if he/she were his/her spouse; descendants, including unborn and fully adopted children (16);ascendants who were in the care of the deceased beneficiary, if there is no spouse, ex-spouse or descendant with the right to the same pension.
Death Allowance	To the family members of the deceased beneficiary (as listed under the survivor's pension) and in the absence of any such family member, to the ascendants. (17) No qualifying period is required.
Reimbursement of funeral expenses	If no person has the right to the death allowance, the person who can show they paid the expenses of the beneficiary's funeral may be reimbursed for those expenses up to the value of the respective benefit.

### *Who is covered*

Beneficiaries under the general Social Security scheme, namely employees, and self-employed persons, as well as beneficiaries under the Voluntary Social Security scheme.

## Disability Benefits

These benefits provide support in situations involving disability.

Benefits	Payments made
Disability Supplement	As a supplement to the Family Allowance for Children and Young Persons. The payment is made as compensation for additional family expenses that result from the descendants of the beneficiaries (aged 24 years or less) attending or boarding at a rehabilitation centre, or needing individual education and/or specific therapeutic support. (18)
Special Education Allowance	To compensate for the costs of special education for a disabled child or young person (aged 24 years or less) incurred through attendance at a profit-making or co-operative educational institution, or received as specialised educational support also from a profit-making institution.
Monthly benefits for life	To descendants under the care of a beneficiary under the general scheme (19), aged 24 years or more and have a physical, organic, sensory, motor or mental disability which makes it impossible for them to support themselves.
Special Solidarity Supplement Benefits	As a supplement to the Monthly benefits for life and the Invalidity pension. The amount of this monthly payment varies according to the age of the recipient.
Extended Invalidity Pension	To persons in situations of economic or social hardship 18 years or older, via the Non-contributory Scheme, provided they have been declared as unfit for work and this has been certified by the Incapacity Verification System.

### *Who is covered*

Disabled children and young persons who are dependent upon beneficiaries under the general Social Security scheme or the Non-Contributory scheme suffering from economic and social hardship.

## SITUATIONS OF DEPENDENCY

These benefits are designed to compensate for expenses incurred in relation to situations of dependency.

Benefits	Payments made
3rd person Assistance Allowance	To compensate for increased family costs resulting from the employment of a third person to render assistance in ensuring the basic daily living requirements of disabled persons who are descendents of beneficiaries receiving family allowance for children and young persons, together with the disability supplement or monthly benefits for life.
Dependency Supplement	To compensate for costs resulting from situations of dependency applicable to invalidity, old-age or survivor pensioners under the general Social Security scheme or under the non-contributory scheme or equivalent, in cases of dependency, and where the assistance of another person is required, as recognised by the Incapacity Verification System.

### *Who is covered*

The 3rd Person Assistance Allowance covers children and young persons receiving Family Allowance, together with the disability supplement or the monthly benefits for life, who find themselves in the situations described above. The Dependency Supplement covers invalidity, old-age or survivor pensioners under the general Social Security scheme or under the non-contributory scheme or equivalent, in the situations described above.

## Situations involving economic and social hardship

The Non-contributory Scheme Benefits granted through the Non-contributory Scheme are designed to protect persons in situations of social and economic hardship who are not protected under compulsory contributory schemes.

<b>Benefits (20)</b>	<b>Payments made</b>
Old Age Pension	To persons aged 65 years or more.
Extended Invalidation Pension	To persons 18 years or more, who have been declared as unfit for any work.
Special Solidarity Supplement	To persons receiving Invalidation or Old-Age pensions (Supplement is added to the pension)
Widow's Pension	To the surviving spouse with an Extended Pension.
Orphan's Pension	To orphans until age of adulthood or emancipation.
Disability Supplement	To disabled children and young persons under 24 receiving Family Allowance.
Special Education Allowance (21)	To children and young persons under 24 years, who are attending a special education school.
3rd person Assistance Allowance	To children and young persons together with a disability supplement and who require the third person assistance to ensure their basic daily needs.
Dependency Supplement	To persons who are pensioners under Social Security and are in a situation of dependency.

### *Who is covered*

Persons in situations of social and economic hardship not covered under a compulsory contributory scheme and who are:

- Portuguese Nationals
- Nationals of Member States of the European Community who are resident in Portugal
- Refugees, stateless persons and resident foreign nationals.



## Qualifying periods

### For Granting of Benefits under the General Social Security Scheme

<b>Benefits</b>	<b>Qualifying periods</b>
Invalidity Pension	5 calendar years of registered income, either consecutive or accumulated, for relative invalidity. three calendar years of registered income, either consecutive or accumulated, for relative invalidity. (28)
Old Age Pension	1five calendar years of registered income, either consecutive or accumulated. (28)
Survivor's Pension	36 months of registered income.
Unemployment Benefits	540 days of registered income in the 24 months immediately prior to the date of unemployment.
(Initial) Extended Unemployment Benefits	180 days of registered income during the 12 months immediately prior to the date of unemployment.
Sickness benefits	six calendar months, consecutive or accumulated, of registered income from the date of the start of the incapacity for work (qualifying period). 12 days of registered income for work carried out in the four months immediately prior to the month before the date of the start of the incapacity (index of professionalism).

<ul style="list-style-type: none"> <li>– Maternity allowance</li> <li>– Paternity allowance</li> <li>– Adoption allowance</li> <li>– Allowances in cases of Illness of Descendants who are Minors or Disabled</li> <li>– Allowances in cases of severely disabled and chronically ill persons</li> <li>– Allowance for specific risks</li> <li>– Parental leave allowance</li> <li>– Special Leave for Grandparents</li> </ul>	<p>Six calendar months, consecutive or accumulated, of registered income from the date of the event which led to the granting of the payments (1st day of incapacity for work)</p>
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## For Granting of Benefits under the Voluntary Social Security Scheme

Benefits	Qualifying periods
Invalidity pension	72 months of registered income
Old age pension	144 months of registered income
Death – Survivor’s Pension	72 months of registered income
Death – Death Allowance	36 months of registered income

### Social Integration Benefit (RSI)

The social integration benefit includes an integration programme and is designed to provide appropriate support for persons and their families. This support is intended to assist them with their basic needs and to facilitate their integration into work, society and the community.

Benefits	Payments made
Social Integration Payment	To persons who are 18 years or over who lack sufficient economic means to provide for their essential needs. Those aged less than 18 years are also entitled if they have minors who are economically dependent on them – this includes pregnant women.

## **Special Support (23)**

This is an additional payment made in the following cases:

- When the household includes persons with a severe physical or mental disability;
- When the household includes persons with a chronic illness (in such cases, a medical report should be submitted);
- When the household includes elderly persons in a situation of dependency;
- To assist with rent or mortgage payments (you must submit the rent receipt or a statement from the bank, as appropriate).

### ***Who is covered***

Persons in situations of economic or social hardship who meet the following conditions:

- Legally resident in Portugal;
- Not receiving Social Security or welfare payments, individually or as a household, that are equal to or greater than the amount prescribed by law (RSI amount);
- Declaration in writing saying that will enrol in and attend a registered Integration Programme;
- Registered at the Employment Centre (Centro de Emprego) in the area of residence, in case of being unemployed and satisfying the conditions for work;
- Requested evidence of economic hardship;
- Aged 18 years or older, except in the following cases:
  - Have minors in their care who are exclusively dependent on the household;
  - Pregnant women;
  - Non-marital partnership longer than one year.

## Supplementary Benefit for Elderly Persons

The Supplementary Benefit for Elderly persons is an additional payment for persons already receiving a benefit and is aimed at persons on low incomes.

Benefit	Payments made
Supplementary Benefit For Elderly persons	To persons who are 65 years or more whose annual income is less than that prescribed from year to year as a threshold for the Supplementary Benefit, and who have lived in Portuguese territory for a period of not less than six years counting from the date on which the application is submitted.

### *Who is covered*

Portuguese and foreign nationals with low incomes who meet all of the following conditions:

- 70 years or more in 2007 or 65 years or more in 2008.
- Annual income is less than that prescribed from year to year as a threshold for the Supplementary Benefit.
- Have lived in Portuguese territory for a period of not less than six years as at the date on which the application is submitted.

And at least one of the following conditions:

- Beneficiary of an old-age, survivor's or equivalent pension;
- Beneficiary of monthly benefits for life;
- A Portuguese national who has no right to an extended pension because he did not meet the income test.

## **Social Action**

The aim of social action is to prevent and remedy situations of socio-economic hardship and inequality, social dependence, dysfunction or exclusion, as well as to assist the integration of persons into the community and to develop their abilities. It aims also to provide special protection for the most vulnerable in the community, namely children, young persons, persons with disabilities and the aged, as well as persons in situations of economic or social hardship.

### ***What does social action actually involve?***

In practice, social action provides:

- Access to the national network of social services and facilities;
- Support for programmes that fight poverty, dysfunction, marginalisation and social exclusion;
- One-off cash benefits, in exceptional cases;
- Benefits in kind.

Access to social action programmes depends on:

- An analysis of the circumstances of persons and their families by social workers and counsellors who will also provide information, guidance and direction;
- The extension of the national network of social services and facilities;
- Financial resources of the Services.



## IV. PERSONS IN DIFFICULTY

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### ***Social Services for Children and Young Persons***

#### **Childminder (*Ama*)**

A service carried out by a suitable person in the home, for children up to three years of age, when parents are working or unable to be present. Crèche – A facility which provides socio-educational support for children up to three years of age, when parents are working or unable to be present.

#### **Nursery School**

A facility providing educational activities and support for families and children from three-year-olds up to the starting age for primary school.

#### **Leisure Activities Centre**

A facility that carries out socio-cultural activities for children and young persons from six years of age, at times made available by the school authorities.

#### **Holiday Camp**

A facility providing leisure activities for children and young persons.

#### **The “*be-a-child*” programme**

The program aims to prevent or eliminate situations of social vulnerability affecting children/young persons and their families, through supporting projects within the family and the community and new forms of intervention and research-action.

#### **Programme to Extend the Social Facilities Network (PARES)**

This programme aims to widen the Social Facilities Network and establish it as one of the pillars of the integrated development strategy of the nation’s social policies. This is a determining factor in the well being of citizens and families and the improvement of their living conditions.

## ***For Children and Young Persons at risk (25)***

### **Centre for Family Support and Parental Guidance**

Aims to build the personal skills of the persons assisting the family of the child/young person at risk, through an integrated approach. Furthermore, it seeks to act as a mediator between the family and the services working with it.

### **Street Team for Support to Children and Young persons**

Provides support for children and young persons who are experiencing family and social breakdown, are at risk, are living outside the socio-family unit or are living off delinquent behaviour and without any institutional or family support.

### **Foster Families**

The placement of a child or young person with a suitable family, as a substitute for their natural family when the latter is not an option for the child.

### **Children's Shelter**

Provides for the urgent and temporary (less than six months ) shelter of children and young persons up to the age of 18 who are at risk as a result of abandonment, abuse, neglect or other reasons, and aims to provide guidance regarding lifestyle choices.

### **Children and Young Persons' Home**

Provides long-term accommodation (more than six months ) for children and young persons up to the age of 18 and aims to provide them with suitable care for their needs, well-being and on-going education.

### **Independent Living Support**

Accommodation within the local community to assist young persons (aged 15 years or more, with appropriate personal qualities) in their transition to adult life, designed to minimise the risk of social exclusion.



## **Holiday Camp**

A facility that provides leisure activities for children and young persons.

## **Adoption**

The legal creation of a bond between two persons, which is similar to the parent/child bond but without blood ties. This bond is established through a legal ruling and under the terms of the Portuguese Family and Minors Court.

## **National Social Emergency Line (LNES)**

A free nationwide public service operating round the clock to protect and ensure the safety of citizens who find themselves in a Social Emergency situation. Available 24 hours a day, 365 days a year.

## ***Disabled Children and Young Persons***

### **Early Intervention**

Integrated support in the areas of education, health and social action. The program aims to assist in the development of children up to the age of six who are disabled or at risk of becoming severely retarded. It seeks to assist in the integration of these children within their families, with particular focus on children below the age of three.

### **Temporary Accommodation**

Provides temporary accommodation for children and young persons (aged six to 16/18 years of age) as a way to meet needs that cannot be met at their normal place of residence, or to provide temporary support for their families.

### **Transport for Disabled Persons**

Community service providing support for children, young persons and adults who are disabled and need transport and personal assistance.

## **Holiday Camp**

A facility or service that provides leisure activities for children and young persons.

## ***Drug Dependants***

### **Direct Action Teams**

These teams work with the drug dependant community and their families and, in a general way, with communities affected by the phenomenon of drug addiction. They work to encourage drug dependants to join recovery, treatment and social rehabilitation programmes through carrying out awareness raising activities.

### **Accommodation for Social Rehabilitation**

Temporary residential units providing support for drug dependants who, after leaving treatment units or prisons, protection centres, or other establishments within the judicial system, have problems reintegrating into family, society, schools or work.

## ***Persons with HIV/AIDS***

### **Care Centre/ Psycho-social Support**

For persons infected with or ill with HIV. Provides information and counselling during the daytime.

### **Home Help**

Provides individual and personalised care in the home to persons and families unable to either temporarily or permanently ensure the satisfaction of their basic and/or daily needs.

### **Residential Accommodation**

For persons infected with HIV/AIDS who are experiencing family breakdown and difficult socio-economic conditions. The residences provide housing for between five to ten persons and are intended to provide an atmosphere that is as close as possible to a family unit.

## *The Homeless*

### **Street Team for Homeless Persons**

An interdisciplinary team which works cooperatively with homeless persons to improve their living conditions, through providing food and clothing as well as psychological and social support.

### **Occupational workshop**

Support for the adult, homeless population. This action encourages development of social abilities and skills, through regular participation in activities within “structured” programmes, or participation in “flexible” programs where availability and motivation are more difficult.

## *Individuals and Families experiencing difficulties*

### **Care/Social Support**

A front line service which aims to help individuals and their families in preventing and/or solving problems which have created or have been created by circumstances of social exclusion. In certain other cases, the service also responds to emergency situations.

It is targeted at individuals and their families who are residents of a specific geographical area (parish, district ...) and who find themselves in a difficult or socially vulnerable situation.

### **Self-Help Groups**

Small self-help groups organised by and made up of persons who share the same circumstances/problem. The groups seek to find solutions through the sharing of experiences and the exchange of information. They are for young persons and adults who are disabled or experiencing severe psychiatric problems (that have stabilised or are still developing), and for their families as well.

### **Community Centre**

Provides services and conducts a range of linked activities which aim to provide a focus for the prevention of social problems and the development of a local project by the group involved.

### **Holiday Camp**

For all age groups and the family as a whole. It provides leisure activities and a break from daily routine.

### **Refectory/Canteen**

Provides meals, especially to persons on low incomes, and can include other activities such as personal hygiene and laundry.

### **Centre for Support for Life**

Provides support and guidance to women who are pregnant or in labour or with newborn children, who are at emotional or social risk.

### **Community for Integration**

A series of actions directed at the social integration of various target-groups which, for various reasons, find themselves in situations of exclusion or social marginalisation.

### **Temporary Shelter**

Provides temporary accommodation for persons experiencing hardship, particularly transient populations, homeless families and other groups undergoing a social emergency. This service should preferably be carried out in conjunction with other rehabilitation actions.

### **Food Aid**

Distribution of food products through nonprofit organisations to help resolve food shortages experienced by individuals and families.

### **Local Contacts for Social Development Programme (CLDS)**

Promotes the social inclusion of citizens, in various sectors and in an integrated way, and involves carrying out activities in partnership with others to fight persistent poverty and social exclusion in depressed areas.

## ***Disabled Persons (27)***

### **Care/Social Support and Activities for Disabled Persons**

A service carried out in a multi-functional space which aims to inform, guide and support disabled persons, and to help them develop the skills they need to resolve their own problems; also includes social activities.

### **Home Help**

Provides personalised care in the home to disabled persons who are unable, either temporarily or permanently, to ensure the satisfaction of their basic and/or daily needs.

### **Occupational Activities Centre**

Provides occupational activities for young persons and adults (from 16 years of age) who are severely handicapped or disabled, in order to stimulate and facilitate the development of their abilities.

### **Foster Families**

The temporary or permanent placement of disabled adults with a suitable family when they cannot remain in their own home due to the lack of a family structure.

### **Disabled Persons Shelter / Home**

Provides accommodation for disabled persons aged 16 years or over who are unable to live in the normal family environment for a temporary or more extended period.

### **Transport for Disabled Persons**

Community service providing support for children, young persons and adults who are disabled and who need transport and personal assistance.

**Holiday Camp**

Provides leisure activities and a break from daily routine, which is considered essential to the physical, psychological and social well being of persons.

***Independent Elderly Persons*****Home Help**

Provides personalised care in the home to elderly persons who are unable, either temporarily or permanently, to ensure the satisfaction of their basic and/or daily needs.

**Activity Centre**

Provides a support service for development of social, recreational and cultural activities that are organised by and for elderly persons within a community.

**Day Care Centre**

Helps elderly persons to remain in their own social/family environments by providing a number of services including meals, socialising, personal hygiene, laundry, and organised holidays.

**Night Care Centre**

Provides support for independent elderly persons who experience loneliness, isolation and insecurity and need support during the night.

**Holiday Camp**

Provides leisure activities and a break from daily routine, which is considered essential to the physical, psychological and social well being of persons.

**Residences**

A set of apartments with common service facilities, for elderly persons who are able to take care of themselves.

### **Aged Persons Home**

Communal facilities, including temporary or permanent accommodation for elderly persons seriously at risk of losing their independence and/or autonomy.

### **Integrated Support for Elderly Persons (PAII)**

This programme provides a set of innovative measures to improve the quality of life of elderly persons. It focuses on life at home and the day to day environment and develops projects at a local and central level.

### **Re-Invent the Future Project**

A project at national level to help persons prepare for retirement, from a preventative and inclusive perspective, using principles such as lifelong development and learning, staying active in old age and empowerment.

### **Comfortable Homes for Elderly Persons (PCHI)**

This program seeks to improve facilities in the home and the mobility of elderly persons who already use the home help services, so as to prevent their institutionalisation.

### **Victims of Domestic Violence Care Centre**

One or more technical interdisciplinary teams provide care, support and guidance for women who are the victims of violence, with a view to their protection. Social Security, Education, Health, Justice and Local Authorities work together to provide an appropriate response.

### **Refuge**

A facility to accommodate temporarily women who are victims of violence and are unable to stay in their normal place of residence due to safety reasons (accompanied or not by minor children).

## *For Elderly Persons in Situations of Dependency*

### **Foster Families**

The temporary or permanent placement of elderly persons with a suitable family when they cannot remain in their own home due to a lack of family structure and/or social services.

### **Home Help**

Provides personalised care in the home to elderly persons who, because they are ill, disabled or have other problems, are not able to either temporarily or permanently meet their basic and/or daily needs.

### **Aged Persons Home**

Communal facilities, including temporary or permanent accommodation for elderly persons seriously at risk of losing their independence and/or autonomy.

### **Integrated Support for Elderly Persons (PAII)**

This program provides a set of innovative measures to improve the quality of life of elderly persons. It focuses on life at home and the day to day environment and develops projects at a local and central level.

### **National Network for Ongoing Integrated Care**

Professional units and teams integrated in local community services (including hospitals, health centres, local and district Social Security office, the Solidarity Network and local authorities) provide ongoing health care, social support, and palliative care.

## *Persons in Situations of Dependency*

### **Home Help**

Provides personalised care in the home to persons and families who, because they are ill, disabled or have other problems, are not able to either temporarily or permanently meet their basic and/or daily needs.



### **Integrated Home Help**

Provides 24 hours a day, seven days a week home care, including social and health care, through a set of multidisciplinary actions that are flexible, wide ranging, accessible and linked to each other. Social security and health services work in an integrated way to ensure that the network of ongoing care functions in an appropriate manner.

### **Integrated Support Unit**

Provides temporary, comprehensive and integrated care to persons in a situation of dependency who need home support but do not need admission to hospital for clinical care. Social Security and Health services work in an integrated way to ensure that the network of ongoing care functions in an appropriate manner.

### **Holiday Camp**

Provides leisure activities and a break from daily routine, which is considered essential to the physical, psychological and social well being of persons.

### **National Network for Ongoing Integrated Care**

Professional units and teams integrated in local community services (including hospitals, health centres, local and district Social Security office, the Solidarity Network and local authorities) provide ongoing health care, social support, and palliative care.



## VI. INTERNATIONAL COORDINATION

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Portugal is bound to various States through bilateral conventions and other international Social Security legal instruments, and, in particular, Community Regulations that apply in the area of Social Security.

### *Community regulations*

#### **EU, EEA and Switzerland**

European Union: Germany, Austria, Belgium, Bulgaria, Cyprus, Denmark, Slovenia, Spain, Estonia, Finland, France, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, United Kingdom, Czech Republic, Slovak Republic, Romania and Sweden.

#### **EFTA States that form the European Economic Area**

Iceland, Liechtenstein, Norway and Switzerland.

### *Bilateral Conventions*

Andorra, Argentina, Australia, Brazil, Cape Verde, Canada – Quebec, Chile, United States of America, Morocco, United Kingdom, regarding the Channel Islands (Jersey, Guernsey, Herm, Jethou and Man), Uruguay, Venezuela.

### *Who is covered*

- Workers who are nationals of the respective States, their families and heirs;
- Persons subject to the respective schemes, irrespective of their nationality, and their families and heirs.

### ***Guaranteed Protection***

For persons who work, reside or move within the States to which these international Social Security schemes apply. The aim is to ensure these persons:

- Equality of treatment with the nationals of the States where they reside and work, as concerns the operation of the Social Security scheme and access to its benefits and measures for the purposes of social action/integration.
- The ability to have recourse to all measures of the Social Security schemes to which they are contributing or have contributed;
- The preservation of acquired rights or rights in the process of being acquired, and consequently, the unconditional transfer of any benefits to which they are entitled to the Portuguese scheme, or the possibility of doing so at a later stage, taking into consideration where necessary, the contributory periods under the Portuguese Social Security scheme and those under the schemes of other countries where the person stayed.

### ***Further Information***

- Visit the Social Security website at [www.segsocial.pt](http://www.segsocial.pt)
- Use Social Security Direct (*Segurança Social Directa*), the new way to communicate with Social Security for persons and companies, available on the Internet at [www.seg-social.pt](http://www.seg-social.pt)
- Go to a Social Security office.

The information provided in this chapter does not substitute for or dispense with the need to consult the applicable legislation.

## FOOTNOTES

- 1) If the declaration is not made the employer is subject to sanctions. This can prejudice the rights of workers under Social Security.
- 2) This scheme is compulsory for self-employed persons with gross earnings greater than six times the value of the Social support index (IAS). Self-employed persons need not register during the first 12 months of activity.  
Persons who restart self-employment after having left the scheme on a previous occasion are deemed to be covered under the current scheme, irrespective of the earnings received under that employment.  
Joining the scheme is optional for self-employed persons with annual gross earnings equal to or less than the above value but the person concerned must so request.
- 3) In these situations, workers do not have access to unemployment benefits. Through agreement with the employer, an amount can be established as a base value for contributions, provided that the domestic service worker is contracted on a monthly basis and is 50 years of age or less. In this case, the global contribution rate is 31.6%, (20.6% paid by the employer and 11% by the worker) and the worker then has the right to unemployment benefits.
- 4) The grant of benefits depends on satisfaction of the conditions under which they are given. To receive benefits, persons must apply using the correct form, at a Social Security office and within the periods legally prescribed. A Sickness Benefits application must be accompanied by a Temporary Incapacity Certificate (CIT).
- 5) The age limit will be extended by three years in cases where a medical statement is submitted to show that the person is unable to make normal progress in his education due to an illness or involvement in a car accident.
- 6) The grant of Extended Unemployment Benefits is dependent on verification of actual income (The gross monthly earnings of the household may not exceed a specified limit).
- 7) The Temporary Incapacity Certificate (CIT) must be sent to the Social Security office no later than five working days after date issue.

- 8) Self-employed persons who have opted for the extended scheme or those who are obliged to register under the extended scheme.
- 9) In multiple birth cases, maternity leave shall be extended for a further 30 days for each additional child. In cases involving risk pregnancies, maternity benefit is granted in respect of the period that the person is unable to work before the birth, as verified by medical declaration.
- 10) The rights of self-employed persons are limited to maternity, paternity, adoption and specific risk benefits.
- 13) Special benefits for invalidity are granted under less stringent conditions, that is, in cases where permanent incapacity results from Familial Paraamyloidosis and Machado-Joseph Disease, HIV (AIDS), an oncological Disease or Multiple Sclerosis.
- 14) In specific situations, as provided by law, the pension may be granted prior to the legal minimum age (examples: in conjunction with long-term unemployment cases, strenuous occupations).
- 15) See the situations where this allowance is granted.
- 16) Until 18 years of age; from 18 to 27 years of age (under certain circumstances); irrespective of age, if they are disabled and receiving family allowance benefits.
- 17) In the absence of ascendants, the benefit may be granted to other relatives, in-laws or persons recognised as related to the beneficiary, either in a direct line or up to the 3rd degree by collateral line, provided that they were under the care of the beneficiary prior to his death.
- 18) When Family Allowance is refused due to earnings over the prescribed limit, the Supplement is granted notwithstanding, provided that the other required conditions have been met.
- 19) Employees, self-employed persons (who have opted for the extended scheme) and some beneficiary groups under the voluntary Social Security scheme.
- 20) The grant of these benefits is subject to a means test, and therefore, the person must prove that neither he nor the relevant household has received earnings greater than the limits prescribed by law.

- 21) This allowance is granted without the application of a means test.
- 22) The Social Security Benefit for Social Integration is for persons who live in economic union with the beneficiary, under the terms of the law.
- 23) Payment of this support depends on recognition of the right to the benefit.
- 24) For the purposes of access to this benefit, a legal resident means the holder of a valid residence permit.
- 25) The Institute for Solidarity & Social Security promotes activities to help protect children at risk, as well as specific intervention programmes, through its District Centres for Solidarity & Social Security.
- 26) Children and young persons who are disabled may be entitled to financial support to assist in the purchase of technical equipment that is designed to alleviate their deficiency and enable them to participate effectively in daily activities including school as well as professional and social activities.
- 27) Adults who are disabled may be entitled to financial support to assist in the purchase of technical equipment that is designed to alleviate their deficiency and enable them to participate effectively in daily activities including school as well as professional and social activities.
- (28) Beneficiaries who don't meet this qualifying period may take into account qualifying periods prior to 31/12/93, under the previous legislation. The qualifying period can include contributory periods from other national or foreign Social Security schemes, provided that there has been at least 1 calendar year of registered income under the general scheme.

More Information at:

[www.iefp.pt](http://www.iefp.pt)

[www.seg-social.pt](http://www.seg-social.pt)



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- 2) Self-Employed in Portugal
- 3) Requirements of the Common Reporting Standard
- 4) Setting Up Fiscal Residence
- 5) Capital Gains Tax on Portuguese Property
- 6) Portuguese Tax Code Summaries
- 7) “VPT” Unveiled
- 8) Tax-Efficient Investing in Portuguese Property
- 9) Income from Portuguese Property
- 10) Taxation on Portuguese Property
- 11) “S.C.I.”: *Sociedade Civil Imobiliária*
- 12) Property Companies: *White-List or Portugal*
- 13) Nominee Companies for Portuguese Property
- 14) Fiscal Representation in Portugal
- 15) “Permutas” or Property Swaps
- 16) Estate Planning & Nominee Companies
- 17) “I.H.T.” – Residence Rules & Determining Domicile
- 18) Moving to Portugal – *before, during & after*
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- 20) “I.R.S.” Tax Credits
- 21) CGT Mitigation: *14 Arrows in the Quiver*
- 22) Residence Rules: *in the EU, Portugal and the UK*
  - Extracts from *Relocating to Portugal - Useful Information*
    - 23) Acquiring Portuguese Citizenship
    - 24) Visas and Legal Framework
    - 25) Your Rights to Health Care
    - 26) Access to Education
    - 27) Recognition of Qualifications
    - 28) Social Security Entitlements
    - 29) Golden Residence Visa
  - 30) Leaving Portugal - *Moving Back*
  - 31) Non-Habitual Residence Status and the Alternatives
  - 32) Trusts, Foundations and Fiduciary Structures