

Electronic Grant Management System (eGMS)

Training Manual for Administering Institution (AI) Users

Project Monitoring Module

If you have any queries or encounter difficulties relating to eGMS, please send email to egmsenquiry@healthbureau.gov.hk

Content

Endorsement of Interim Report (IR) (for RO only).....	1
Endorsement of Final Report (FR) (for RO only)	3
Endorsement of Change of Principal Applicant (for RO only).....	5
Endorsement of Change of Administering Institution (for RO only)	7
Preview the Change Request	9
Update Submission Date of Financial Statement (for FO only)	10
Update Submission Date of Audited Account (for FO only).....	11
Submission of Claim Form (for FO only).....	12
Print the Claim Form (for FO only).....	15

Abbreviations

AI = Administering Institution

DR = Dissemination Report

eGMS = Electronic Grant Management System

EO = Executive Officer

FO = Finance Officer*

FR = Final Report

IR = Interim Report

PA = Principal Applicant

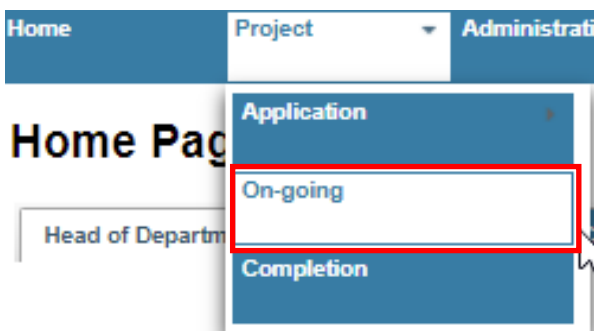
PR = Progress Report

RFS = Research Fund Secretariat

RO = Research Officer*

* *AI users*

Endorsement of Interim Report (IR) (for RO only)

 <p>Home Page</p> <p>Head of Department</p> <p>Application</p> <p>On-going</p> <p>Completion</p>	<p>Step 1:</p> <p>Go to Project > On-going</p>																					
<p>On-going</p> <p>Master List Action List Outstanding List Pushed Back</p> <table border="1"> <thead> <tr> <th>Ref. No.</th> <th>Project Title</th> <th>Principal Applicant</th> </tr> </thead> <tbody> <tr> <td>11</td> <td></td> <td></td> </tr> <tr> <td>13140511</td> <td>HKU 0917 P1 (On-going)</td> <td>Prof HKU Pa1</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Type</th> <th>Change Request No.</th> <th>PR/IR No.</th> <th>Check-in-order List</th> <th>Checked</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>0 Interim Report</td> <td></td> <td>IR1</td> <td></td> <td>N</td> <td>Endorse Push Back</td> </tr> </tbody> </table> <p><< 1 >> 20</p>	Ref. No.	Project Title	Principal Applicant	11			13140511	HKU 0917 P1 (On-going)	Prof HKU Pa1	Type	Change Request No.	PR/IR No.	Check-in-order List	Checked	Actions	0 Interim Report		IR1		N	Endorse Push Back	<p>Step 2:</p> <ul style="list-style-type: none"> Select “Action List”. Click “IR” to view the Interim Report.
Ref. No.	Project Title	Principal Applicant																				
11																						
13140511	HKU 0917 P1 (On-going)	Prof HKU Pa1																				
Type	Change Request No.	PR/IR No.	Check-in-order List	Checked	Actions																	
0 Interim Report		IR1		N	Endorse Push Back																	

Check-in-order List

User Name Ms Eoro HKU

Checked Date

Remarks

(1 of 1) << >>

Ref No.	User Name	Authorised Role(s)
---------	-----------	--------------------

Step 3a (Optional):

Click **“Check-in-order List”** to

- View “checked” details, if any, entered by EO(RO), or
- Enter new entry for “checked” details.

Step 3b:

Click **“Checked Date”** after entering the “checked” details in “Remarks”.

Step 3c

Click **“Confirm Checked”** to save new entry.

Interim Report		IR1	<input type="button" value="Endorse"/>	Y	<input type="button" value="Endorse"/> <input type="button" value="Push Back"/>
Interim Report		IR1	<input type="button" value="Endorse"/>	N	<input type="button" value="Endorse"/> <input type="button" value="Push Back"/>

Step 4a:

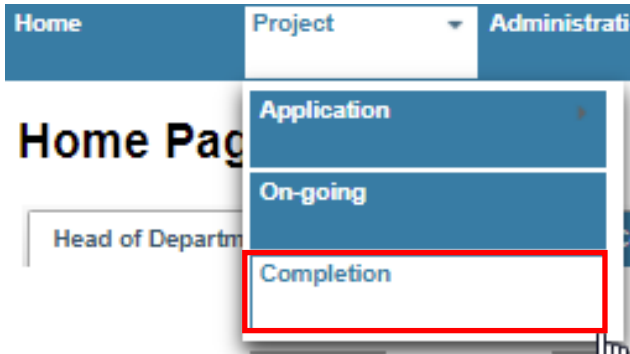
Click **“Endorse”** to endorse the Interim Report and submit the IR to RFS.

OR

Step 4b:

Click **“Push back”** to request PA to revise the IR submission.

Endorsement of Final Report (FR) (for RO only)

	<p>Step 1:</p> <p>Go to Project > Completion</p>												
<p>Completion</p> <p>Master List Action List</p> <table border="1" data-bbox="204 869 1043 1037"> <thead> <tr> <th>Type</th> <th>Change Request No.</th> <th>PR/IR No.</th> <th>Check-in-order List</th> <th>Checked</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Final Report</td> <td></td> <td>FR1</td> <td></td> <td>N</td> <td>Endorse Push Back</td> </tr> </tbody> </table>	Type	Change Request No.	PR/IR No.	Check-in-order List	Checked	Actions	Final Report		FR1		N	Endorse Push Back	<p>Step 2:</p> <ul style="list-style-type: none"> - Select “Action List”. - Click “FR” to view the Final Report.
Type	Change Request No.	PR/IR No.	Check-in-order List	Checked	Actions								
Final Report		FR1		N	Endorse Push Back								
<p>Final Report & Dissemination Report</p> <p>Project Reference No. <input type="text" value="13140521"/> Version <input type="text" value="1"/></p> <p>Project Title <input type="text" value="HKU 0917 P2 (Completion)"/></p> <p>Actual Start Date <input type="text" value="1 Sep 2009"/> Actual End Date <input type="text" value="31 Aug 2011"/></p> <p>Report Status <input type="text" value="Pending Signature"/></p> <div style="border: 2px solid red; padding: 5px;"> <p>Upload Final Report</p> <p>FR(UAT).pdf </p> <p>Upload Dissemination Report</p> <p>DR(UAT).pdf </p> <p><input type="button" value="Close"/></p> </div>	<p>Step 3:</p> <p>Click and preview the FR / DR.</p>												
<table border="1" data-bbox="204 1778 1043 1946"> <thead> <tr> <th>Type</th> <th>Change Request No.</th> <th>PR/IR No.</th> <th>Check-in-order List</th> <th>Checked</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Final Report</td> <td></td> <td>FR1</td> <td></td> <td>N</td> <td>Endorse Push Back</td> </tr> </tbody> </table>	Type	Change Request No.	PR/IR No.	Check-in-order List	Checked	Actions	Final Report		FR1		N	Endorse Push Back	<p>Step 4a (Optional):</p> <p>Click “Check-in-order List” to</p> <ul style="list-style-type: none"> - View “checked” details, if any,
Type	Change Request No.	PR/IR No.	Check-in-order List	Checked	Actions								
Final Report		FR1		N	Endorse Push Back								

Check-in-order List

User Name Ms Eoro HKU

Checked Date

Remarks

Confirm Checked Back Push Back

(1 of 1) << >>

Ref No.	User Name	Authorised Role(s)
---------	-----------	--------------------

entered by EO(RO),
or
- Enter new entry for
“checked” details.

Step 4b:

Click “Checked Date”
after entering the
“checked” details in
“Remarks”.

Step 4c:

Click “Confirm
Checked” to save new
entry.

Type	Change Request No.	PR/IR No.	Check-in-order List	Checked	Actions
Final Report		FR1		N	Endorse Push Back

Step 5a:

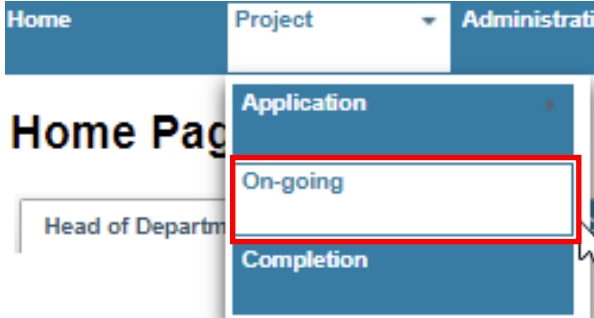
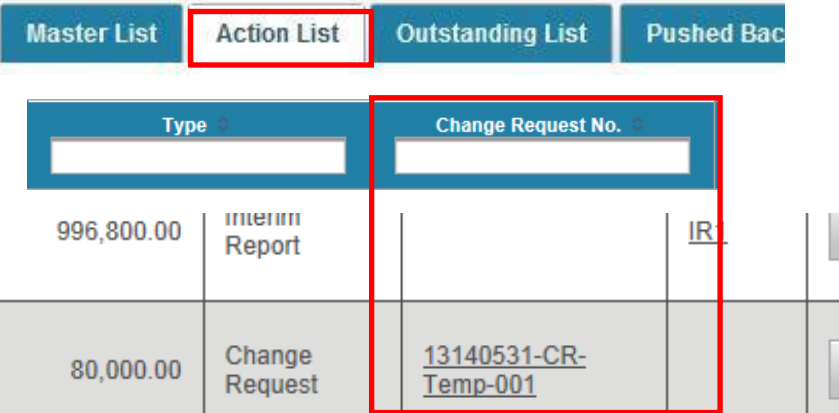
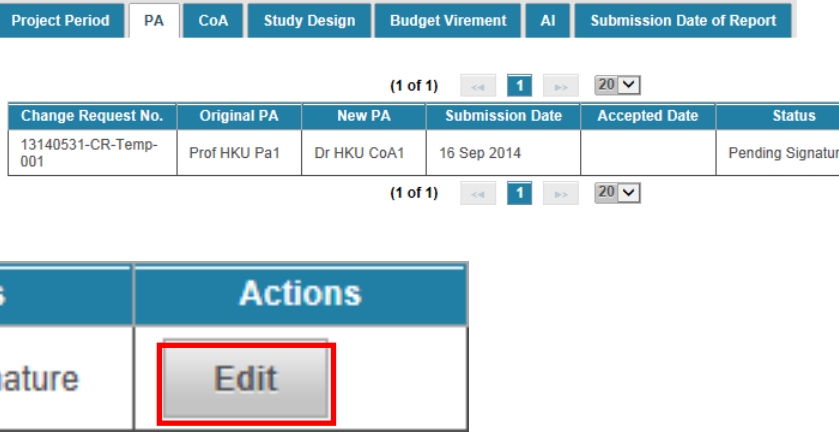
Click “Endorse” to
endorse the Final
Report and submit the
FR to RFS.

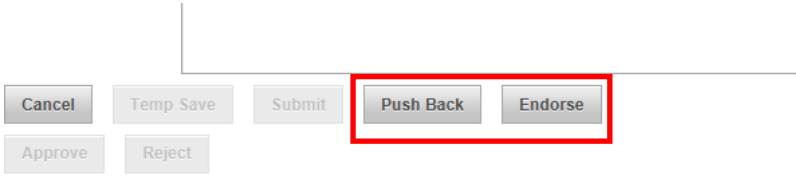
OR

Step 5b:

Click “Push back” to
request PA to revise the
FR submission.

Endorsement of Change of Principal Applicant (for RO only)

	<p>Step 1:</p> <p>Go to Project > On-going</p>
<p>On-going</p> 	<p>Step 2:</p> <ul style="list-style-type: none"> - Select “Action List”. - Click the link under “Change Request No.”
	<p>Step 3:</p> <ul style="list-style-type: none"> - Select “PA”. - Click “Edit”.

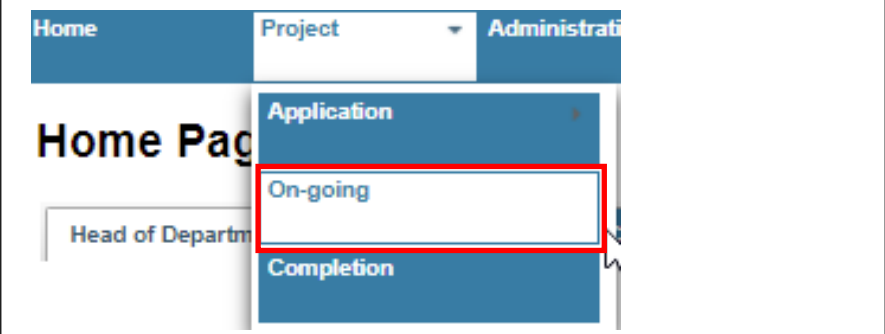
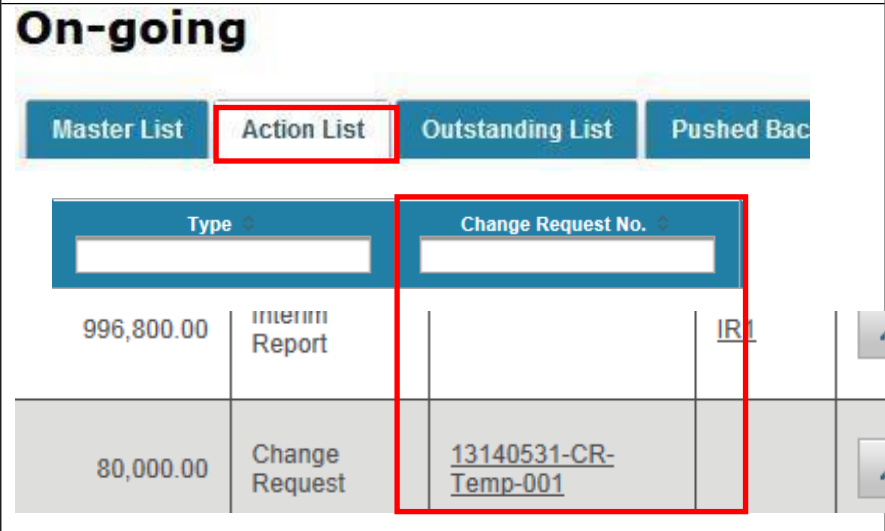
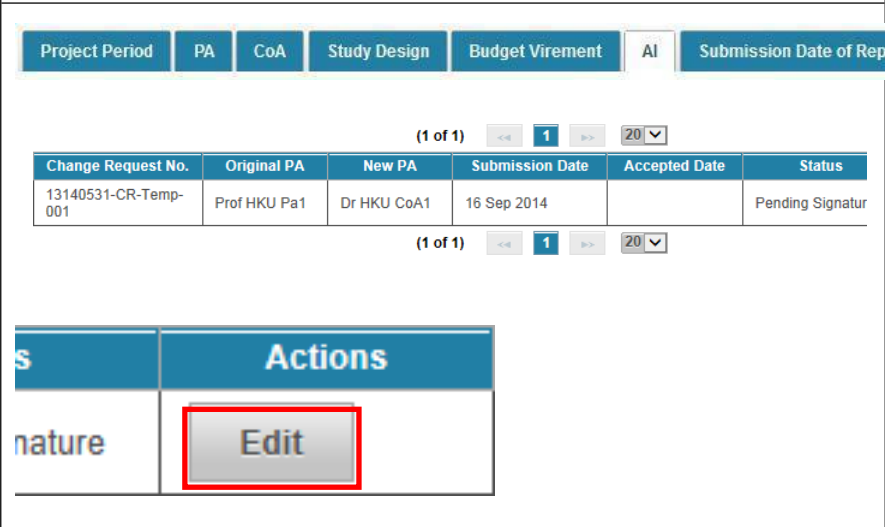


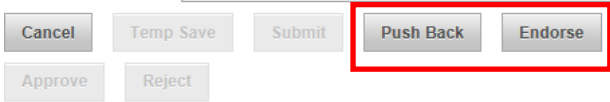
Step 4a:
Click “Endorse” to submit change request to RFS.

OR

Step 4b:
Click “Push Back” to reject the change request from PA.

Endorsement of Change of Administering Institution (for RO only)

	<p>Step 1:</p> <p>Go to Project > On-going</p>
<p>On-going</p> 	<p>Step 2:</p> <ul style="list-style-type: none"> Select “Action List”. Click the link under “Change Request No.”
	<p>Step 3:</p> <ul style="list-style-type: none"> Select “AI”. Click “Edit”.

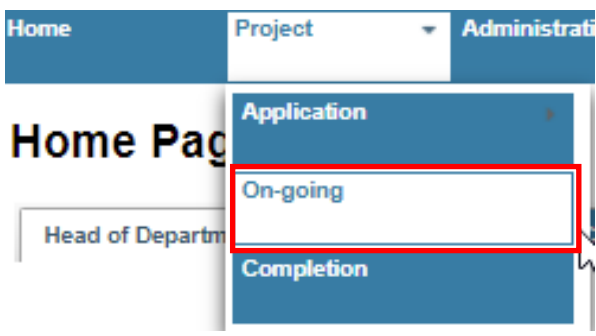
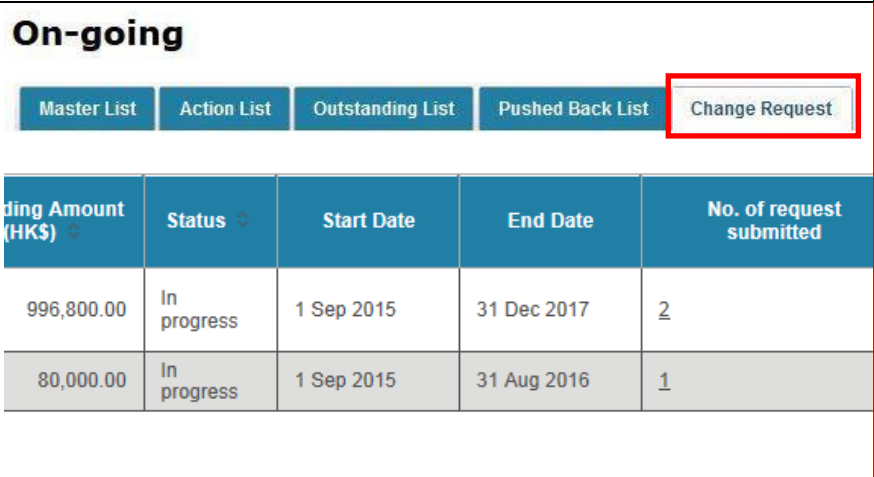


Step 4a:
Click “Endorse” to submit change request to RFS.

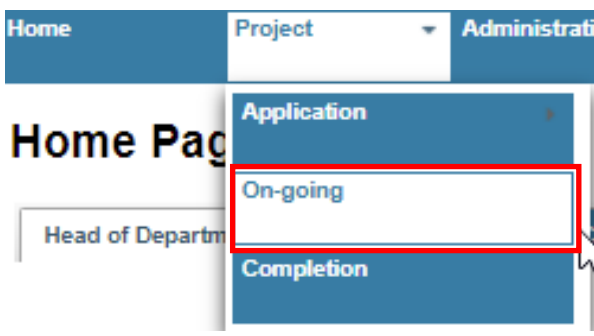
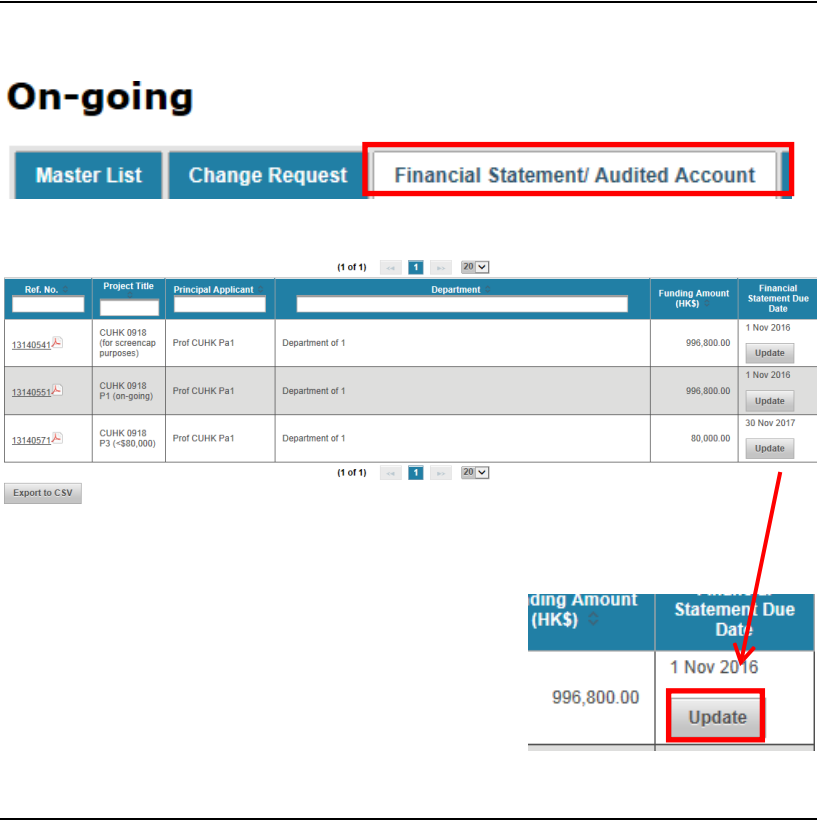
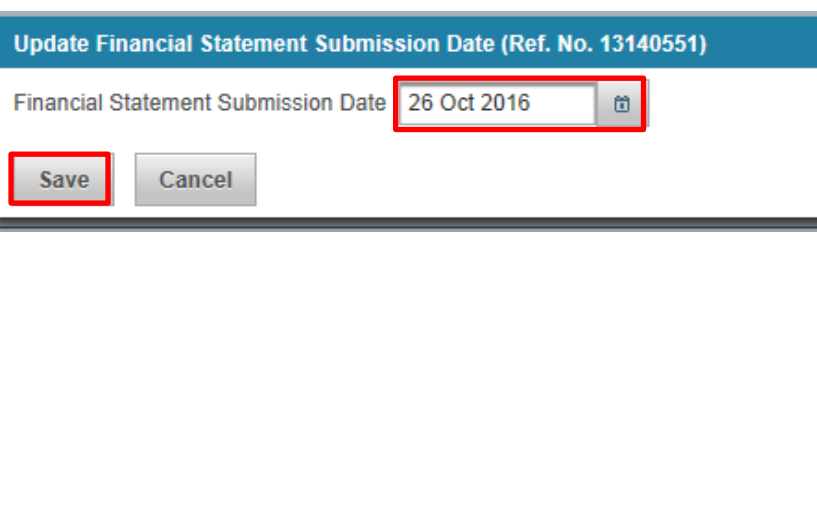
OR

Step 4b:
Click “Push Back” to reject the change request from PA .

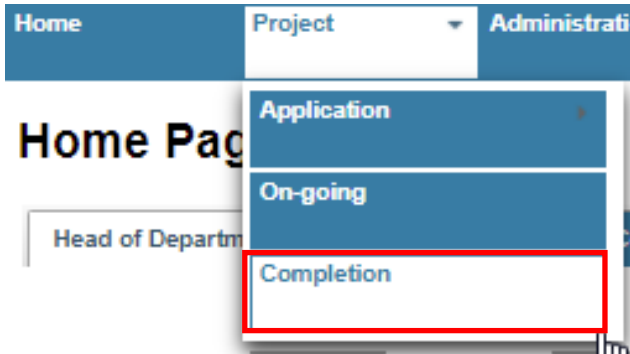
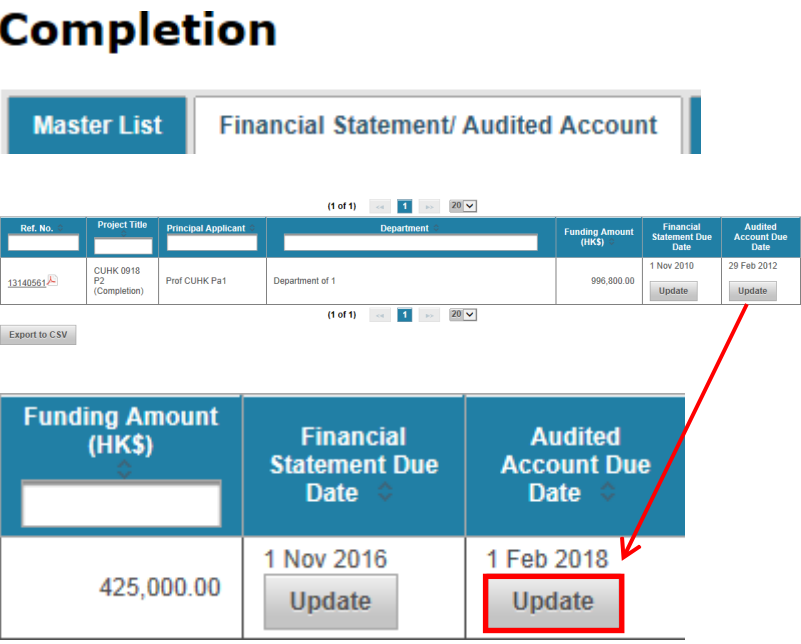
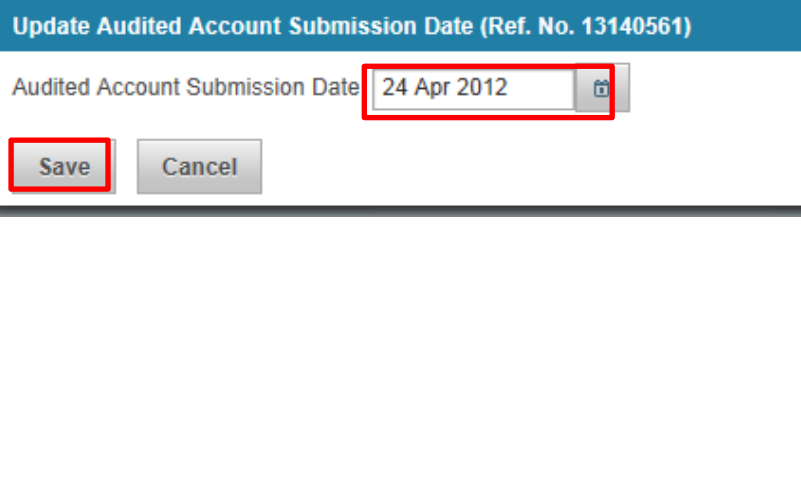
Preview the Change Request

 <p>The screenshot shows a navigation menu with 'Project' selected. A dropdown menu is open, showing options: 'Application', 'On-going' (highlighted with a red box), and 'Completion'. The 'Home Page' and 'Head of Department' are also visible in the background.</p>	<p>Step 1:</p> <p>Go to Project > On-going</p>															
 <p>The screenshot shows the 'On-going' page with tabs: 'Master List', 'Action List', 'Outstanding List', 'Pushed Back List', and 'Change Request' (highlighted with a red box). Below the tabs is a table with the following data:</p> <table border="1"> <thead> <tr> <th>Outstanding Amount (HK\$)</th> <th>Status</th> <th>Start Date</th> <th>End Date</th> <th>No. of request submitted</th> </tr> </thead> <tbody> <tr> <td>996,800.00</td> <td>In progress</td> <td>1 Sep 2015</td> <td>31 Dec 2017</td> <td>2</td> </tr> <tr> <td>80,000.00</td> <td>In progress</td> <td>1 Sep 2015</td> <td>31 Aug 2016</td> <td>1</td> </tr> </tbody> </table>	Outstanding Amount (HK\$)	Status	Start Date	End Date	No. of request submitted	996,800.00	In progress	1 Sep 2015	31 Dec 2017	2	80,000.00	In progress	1 Sep 2015	31 Aug 2016	1	<p>Step 2:</p> <p>Select “Change Request”.</p> <p>Click the number under “No. of request submitted”.</p>
Outstanding Amount (HK\$)	Status	Start Date	End Date	No. of request submitted												
996,800.00	In progress	1 Sep 2015	31 Dec 2017	2												
80,000.00	In progress	1 Sep 2015	31 Aug 2016	1												

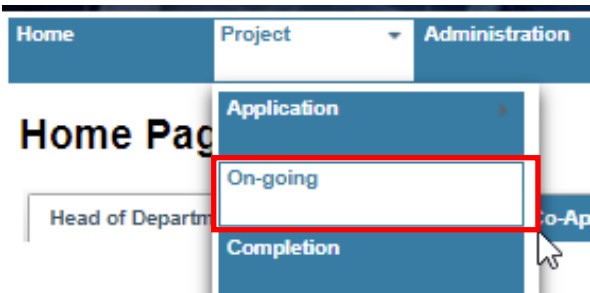
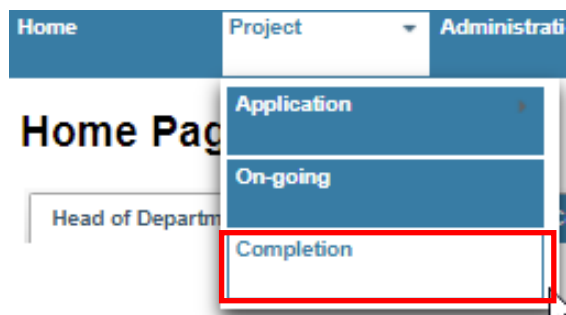
Update Submission Date of Financial Statement (for FO only)

	<p>Step 1:</p> <p>Go to Project > On-going</p>																												
 <p>On-going</p> <p>Master List Change Request Financial Statement/ Audited Account</p> <table border="1"> <thead> <tr> <th>Ref. No.</th> <th>Project Title</th> <th>Principal Applicant</th> <th>Department</th> <th>Funding Amount (HK\$)</th> <th>Financial Statement Due Date</th> </tr> </thead> <tbody> <tr> <td>13140541</td> <td>CUHK 0918 (for screencap purposes)</td> <td>Prof CUHK Pa1</td> <td>Department of 1</td> <td>996,800.00</td> <td>1 Nov 2016</td> </tr> <tr> <td>13140551</td> <td>CUHK 0918 P1 (on-going)</td> <td>Prof CUHK Pa1</td> <td>Department of 1</td> <td>996,800.00</td> <td>1 Nov 2016</td> </tr> <tr> <td>13140571</td> <td>CUHK 0918 P3 (-\$80,000)</td> <td>Prof CUHK Pa1</td> <td>Department of 1</td> <td>80,000.00</td> <td>30 Nov 2017</td> </tr> </tbody> </table> <p>Export to CSV</p> <table border="1"> <thead> <tr> <th>Funding Amount (HK\$)</th> <th>Statement Due Date</th> </tr> </thead> <tbody> <tr> <td>996,800.00</td> <td>1 Nov 2016</td> </tr> </tbody> </table>	Ref. No.	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Financial Statement Due Date	13140541	CUHK 0918 (for screencap purposes)	Prof CUHK Pa1	Department of 1	996,800.00	1 Nov 2016	13140551	CUHK 0918 P1 (on-going)	Prof CUHK Pa1	Department of 1	996,800.00	1 Nov 2016	13140571	CUHK 0918 P3 (-\$80,000)	Prof CUHK Pa1	Department of 1	80,000.00	30 Nov 2017	Funding Amount (HK\$)	Statement Due Date	996,800.00	1 Nov 2016	<p>Step 2:</p> <ul style="list-style-type: none"> - Select “Financial Statement / Audited Account”. - Click “Update” of the respective project.
Ref. No.	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Financial Statement Due Date																								
13140541	CUHK 0918 (for screencap purposes)	Prof CUHK Pa1	Department of 1	996,800.00	1 Nov 2016																								
13140551	CUHK 0918 P1 (on-going)	Prof CUHK Pa1	Department of 1	996,800.00	1 Nov 2016																								
13140571	CUHK 0918 P3 (-\$80,000)	Prof CUHK Pa1	Department of 1	80,000.00	30 Nov 2017																								
Funding Amount (HK\$)	Statement Due Date																												
996,800.00	1 Nov 2016																												
 <p>Update Financial Statement Submission Date (Ref. No. 13140551)</p> <p>Financial Statement Submission Date 26 Oct 2016</p> <p>Save Cancel</p>	<p>Step 3:</p> <ul style="list-style-type: none"> - Update the submission date of the hard copy of Financial Statement to RFS. - Click “Save” to save the submission date. 																												

Update Submission Date of Audited Account (for FO only)

	<p>Step 1:</p> <p>Go to Project > Completion</p>
	<p>Step 2:</p> <ul style="list-style-type: none"> - Select “Financial Statement / Audited Account”. - Click “Update” of the respective project.
	<p>Step 3:</p> <ul style="list-style-type: none"> - Update the submission date of the hard copy of audited account to RFS. - Click “Save” to save the submission date.

Submission of Claim Form (for FO only)

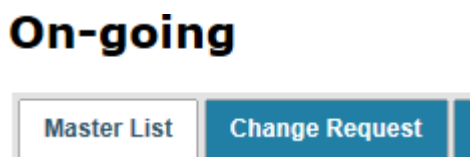



Step 1:

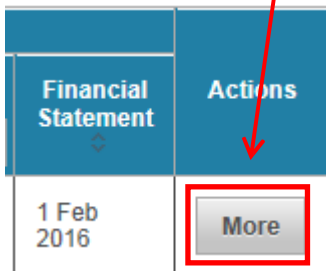
Go to Project > On-going

or

Go to Project > Completion



Ref. No.	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Status	Agreement Date	Start Date	End Date	Due Date				Actions
									Interim Report	Progress Report	Final Report	Financial Statement Due Date	
13140541	CUHK 0918 (for screencap purposes)	Prof CUHK Pa1	Department of 1	996,800.00	In progress	8 Sep 2014	1 Sep 2015	31 Dec 2017	1 Nov 2016		28 Feb 2018	1 Nov 2016 (Submission Date: 28 Oct 2016)	More
13140551	CUHK 0918 P1 (on-going)	Prof CUHK Pa1	Department of 1	996,800.00	In progress	8 Sep 2014	1 Sep 2015	31 Aug 2017	1 Nov 2016	1 Dec 2015	28 Feb 2018	1 Nov 2016	More
13140571	CUHK 0918 P3 (-\$80,000)	Prof CUHK Pa1	Department of 1	80,000.00	In progress	8 Sep 2014	1 Sep 2015	31 Aug 2017	1 Nov 2016	1 Dec 2015	30 Nov 2017	30 Nov 2017	More



Step 2:

- Select “Master List”.
- Click “More”.

More (Ref. No. 03140076) ✕

⚠ Please select

Claim for Reimbursement

Change Request

Financial Statement

Step 3:

Click “**Claim for Reimbursement**”

Claim for Reimbursement of Expenditure

Project Reference No.

Project Title

Start Date End Date

Principal Applicant (PA)

Administering Institution (AI)

Funding Amount (HKD) Accumulated Claim (HKD)

Available Amount (HKD)

Approved Amount

	Staff (HK\$)	Other Expenses (HK\$)	Equipment (HK\$)
<input type="text" value="360,000.00"/>	<input type="text" value="65,000.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

(1 of 1) << >> 20 ▾

Claim Sequence	Submission Date to RFS	Submitted by	Staff (HK\$)	Other Expenses (HK\$)	Equipment (HK\$)	Total (HK\$)	Status	Received Date from RFS
No records found.								

(1 of 1) << >> 20 ▾

Accumulated Claim (HKD)

	Staff (HK\$)	Other Expenses (HK\$)	Equipment (HK\$)
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Available Amount

	Staff (HK\$)	Other Expenses (HK\$)	Equipment (HK\$)
<input type="text" value="360,000.00"/>	<input type="text" value="65,000.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Create new claim form

Export to CSV

Step 4:

Click “**Create a new claim form**”.

Period of Claim (MMM YYYY)

From To ✕

Category	Item								Accumulative Claim (HK\$) (B)	Available Amount (HK\$) (C) = (A) - (B)
		Su	Mo	Tu	We	Th	Fr	Sa		
Staff Cost (Research Staff)	RA	1	2	3	4	5	6	7		360,000.00
		8	9	10	11	12	13	14		
		15	16	17	18	19	20	21		
		22	23	24	25	26	27	28		
		29	30	31						
Subtotal										

Details

Category	Item	Approved Amount (HK\$) (A)	Accumulative Claim (HK\$) (B)	Available Amount (HK\$) (C) = (A) - (B)	Amount(HK\$)	Remarks
Staff Cost (Research Staff)	RA	360,000.00		360,000.00	<input type="text" value=""/>	<input type="text" value=""/>
Subtotal					<input type="text" value="0.00"/>	
Other Expenses	OE item 1	20,000.00		20,000.00	<input type="text" value=""/>	<input type="text" value=""/>
Other Expenses	OE item 2	20,000.00		20,000.00	<input type="text" value=""/>	<input type="text" value=""/>
Other Expenses	Conference	20,000.00		20,000.00	<input type="text" value=""/>	<input type="text" value=""/>
Other Expenses	Audit Fee	5,000.00		5,000.00	<input type="text" value=""/>	<input type="text" value=""/>
Subtotal					<input type="text" value="0.00"/>	

Details

Step 5a:

- Input claim period .
- Input claim amount for the budget item(s).
- For staff cost, click “Details” and input claim amount for the budget item(s)

Staff Detail

	No. (A)	HK\$/Month (B)	Effort on Project % (C)	No. of Months Claimed (D)	Adjustment (HK\$) (E)	Total (HK\$) (A*B*C*D)+(E)
Research Staff						
RA	1	15,000.00	100.0			
Subtotal						0.00

Save Close

Subtotal					
Equipment	Computer	20,000.00			20,000.00
Subtotal					

Supplementary Information / Financial Statement (in PDF format only):

(1 of 1) << >> 10

Filename	Remove
No records found.	

(1 of 1) << >> 10

Attach

Cancel Temp Save Submit

(Remarks: Adjustment (Column E) allows +/- \$1 adjustment for staff cost.)

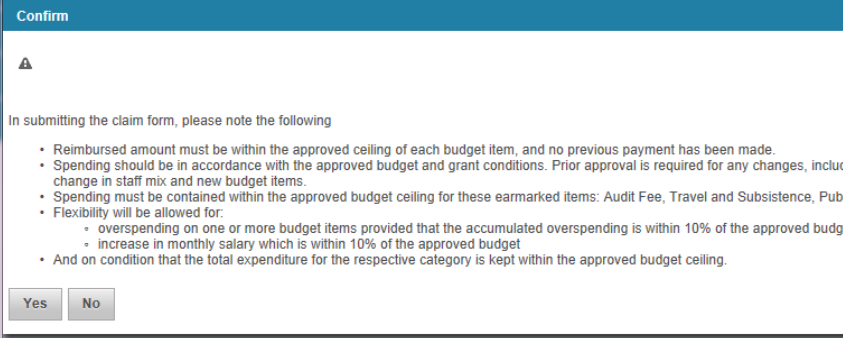
- Attach supplementary information (if any).
- Click "Submit" to submit the claim form to RFS.

OR

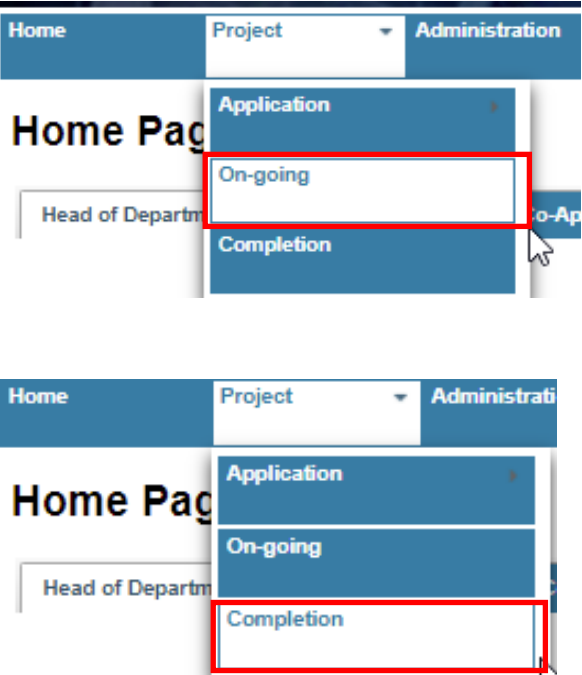
Step 5b:
Click "Temp Save" to save the claim form in the eGMS for submission later.

OR

Step 5c:
Click "Cancel" to cancel the submission action.

	<p>Step 6</p> <p>Click “Yes” to confirm the submission of the claim form to RFS..</p>
	<p>Step 7</p> <p>Send the hard copy of the claim form signed by PA and FO to RFS. Please refer to print function on P.15.</p>

Print the Claim Form (for FO only)

	<p>Step 1:</p> <p>Go to Project > On-going</p> <p>or</p> <p>Go to Project > Completion</p>
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On-going

Master List | Change Request | Financial Statement/ Audited Account | Claim for Reimbursement

(1 of 1) 1 20


Ref. No.	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Status	Start Date	End Date	No. of claim submitted
13140541	CUHK 0918 (for screencap purposes)	Prof CUHK Pa1	Department of 1	996,800.00	In progress	1 Sep 2015	31 Dec 2017	2

Export to CSV

Start Date	End Date	No. of Claim Submitted
2015	31 Aug 2017	1

Step 2:

- Select “Claim for Reimbursement” tab.
- Click the number under “No. of Claim Submitted”.

Received Date from RFS	Payment Date	Actions
		<input type="button" value="Edit"/> <input type="button" value="View"/>
17 Sep 2014	2 Nov 2015	<input type="button" value="View"/> 

Step 3:

Click the PDF icon to download the claim form.

您要開啟或儲存來自 10.75.74.54 的 13140541-CF-001.pdf (6.96 KB)?

開啟(O) 儲存(S) 取消(C) ×

Step 4:

Click “Open” or “Save”.

Attn: Secretariat Executive
 Research Fund Secretariat
 Research Office, Health Bureau
 9/F, Rumsey Street Multi-storey Carpark Building
 2 Rumsey Street, Sheung Wan
 Hong Kong

Health and Medical Research Fund Claim for Reimbursement of Expenditure

Project Reference No. : 01170022
 Project Title : MS Word – testing by Macy on 7 Nov 2017 revised app
 Project Commencement Date : 10 Jan 2018
 Project End Date : 16 Jan 2018
 Administering Institution (AI) (Payee Name) : The University A
 Period of Claim : From Jan 2018 To Jan 2018

Step 5:

- Print pdf file for signature by FO and PA.
- Send the signed copy to RFS.