Electronic Grant Management System (eGMS)

Training Manual for
Principal Applicants (PAs)

Project Monitoring Module

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

Content

Abbreviations

AI = Administering Institution

CoA = Co-Applicant

DH = Department Head*

DR = Dissemination Report

eGMS = Electronic Grant Management System

EO = Executive Officer

FO = Finance Officer*

FR = Final Report

IR = Interim Report

PA = Principal Applicant
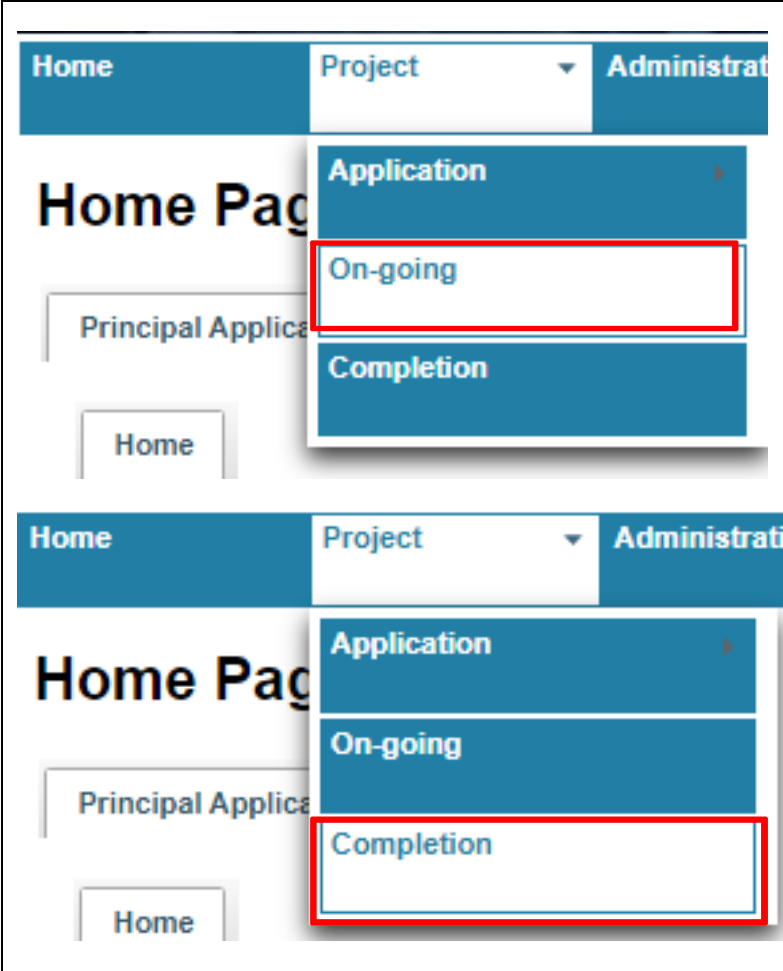
PR = Progress Report

RFS = Research Fund Secretariat

RO = Research Officer*

AI user

View the Summary of Approved Project(s)

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

Actions	Ref. No.	Project Title	Principal Applicant	Department

Funding Amount (HK$)	Status	Agreement Date	Start Date	End Date

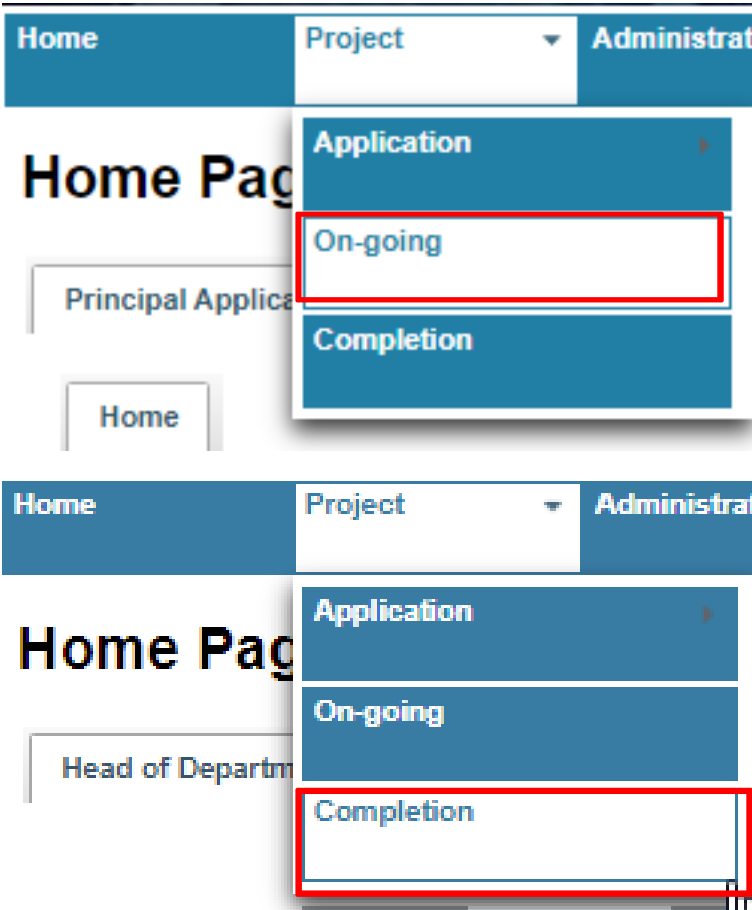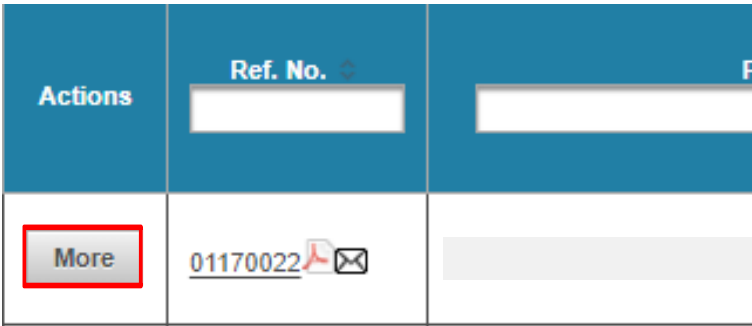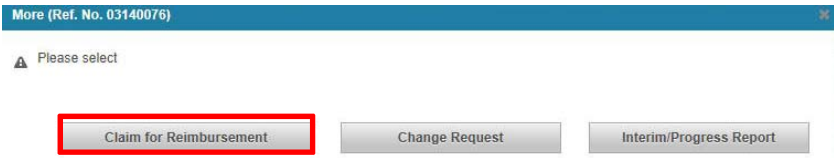| Due Date		
Progress Report	Interim Report	Final Report

Project Closure Date	Published Date	1st Outcome Evaluation Survey Submission Date	2nd Outcome Evaluation Survey Submission Date

Step 2:

Preview the project summary

- Approved amount,
- Project status,
- Agreement issued date,
- Project duration,
- Due date of report(s).
- Project Closure Date
- Published Date of FR
- Submission Date of 1st Outcome Evaluation Survey
- Submission Date of 2nd Outcome Evaluation Survey

Submission of Claim Form

	Step 1: Go to Project > On-going or Go to Project > Completion
	Step 2: Click "More". .
	Step 3: Click "Claim for Reimbursement".

Step 4:

Click "Create a new claim form".

Step 5a:

- Input claim period.
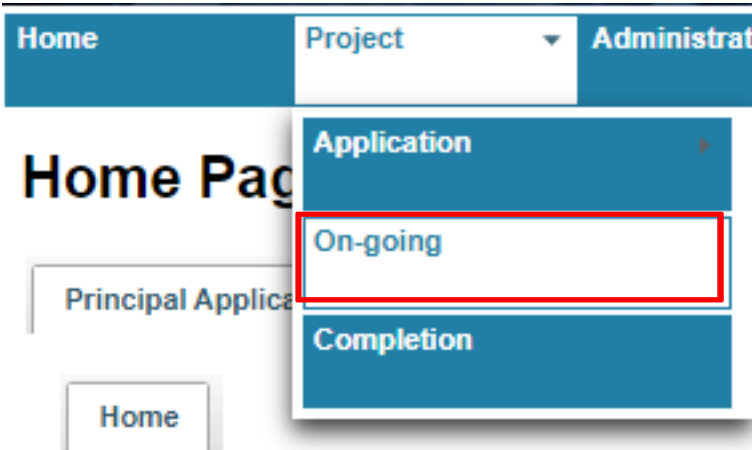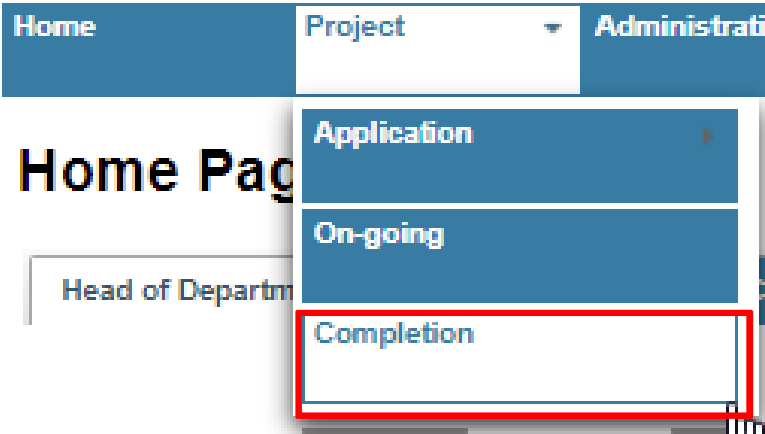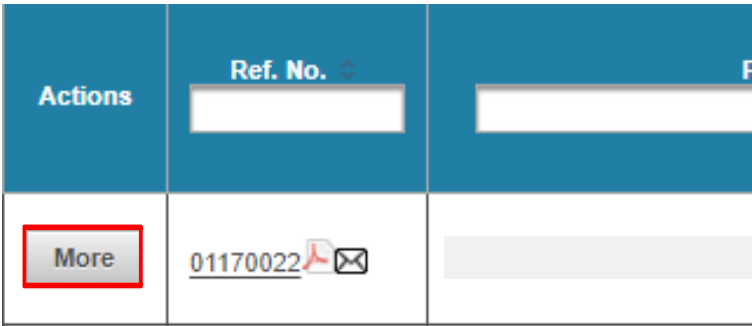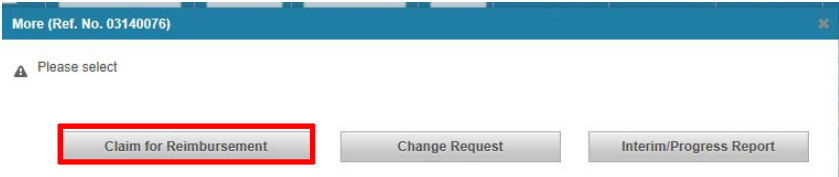
- Input claim amount for the budget item(s).

- For staff cost, click "Details" and input claim amount for the budget item(s)

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

Other Expenses Item 1 5,000.00 5,000.00 Subtotal Supplementary Information / Financial Statement (in PDF format only and all files together should not exceed 1.5MB): (1 of 1) ◄◄ ►► 10 ▾ **Filename** **Remove** No record (1 of 1) ◄◄ ►► 10 ▾ Attach Remarks: Please print and submit a signed hardcopy to RFS. Cancel Temp Save Preview Submit	- "Attach" supplementary information (if any). - Click "<mark>Submit</mark>" to submit the claim form to RFS. *OR* *Step 5b:* Click "<mark>Temp Save</mark>" to save the claim form in the eGMS for submission later. OR *Step 5c:* Click "<mark>Cancel</mark>" to cancel the submission action.
Confirm ⚠ In submitting the claim form, please confirm the following: • No previous payment for the item(s) in the current claim form has been made. • Spending is in accordance with the approved budget and grant conditions. Yes No	***Step 6*** - Click "<mark>Yes</mark>" to confirm the submission the claim form to RFS.
	Step 7 Send the hard copy of the claim form signed by PA and FO to RFS. Please refer to print function on P.5.

Print the Claim Form

	Step 1: Go to Project > On-going or Go to Project > Completion
	Step 2: Click "More".
	Step 3: Click "Claim for Reimbursement".

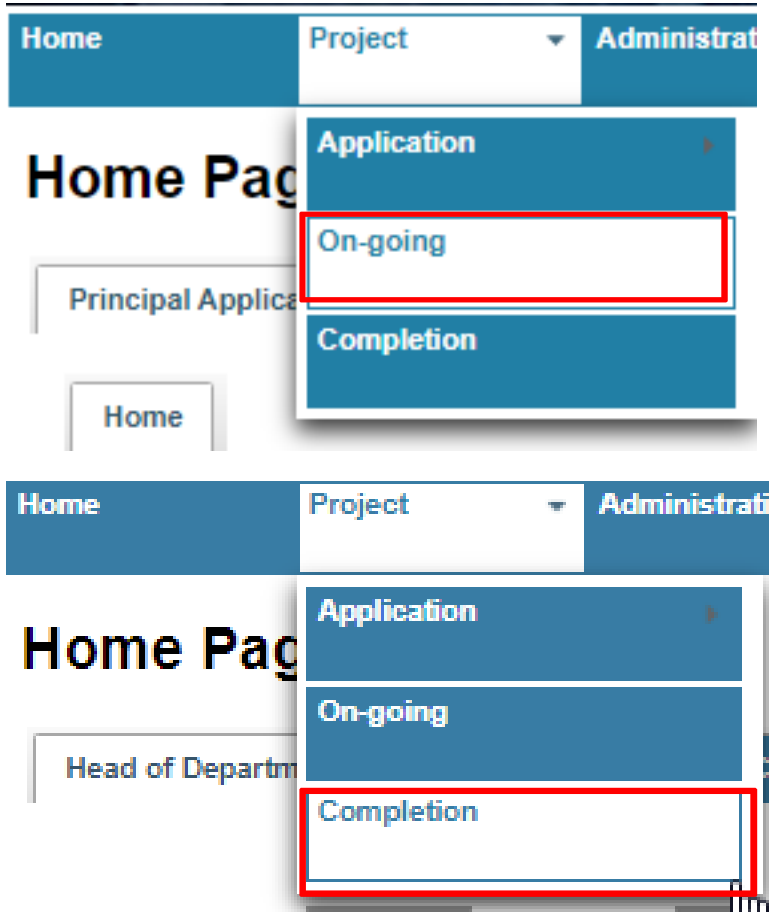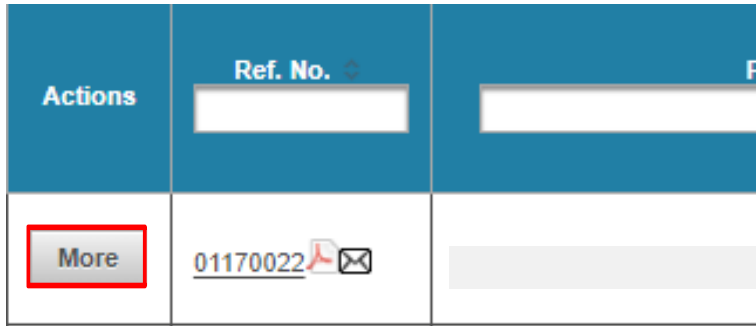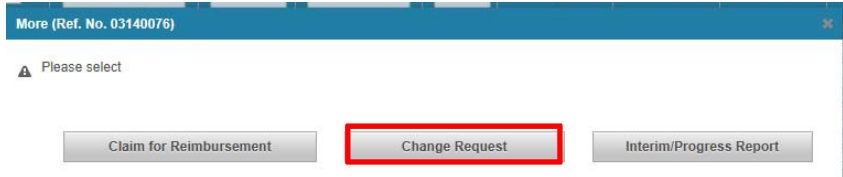|	
Claim for Reimbursement of Expenditure Project Reference No. Project Title 1 Start Date 1 0 End Date 3 Principal Applicant (PA) P Administering Institution (AI) T Approved Amount (HKD) 395,000.00 Accumulated Claim (HKD) 24,000.00 Available Amount (HKD) 371,000.00 Staff (HK$) Other Expenses (HK$) Equipment (HK$) Amount for Individual Category 360,000.00 35,000.00 0.00 (1 of 1) 1 20 ▾ <table><tr><th>Claim Sequence</th><th>Last Edited By</th><th>Submission Date to RFS</th><th>Submitted by</th><th>Staff (HK$)</th><th>Other Expenses (HK$)</th><th>Equipment (HK$)</th><th>Total (HK$)</th><th>Status</th><th>Received Date from RFS</th><th>Payment Date</th><th>Actions</th></tr><tr><td>02130016-CF-001</td><td></td><td>10 Jul 2014</td><td></td><td>360,000.00</td><td>0.00</td><td>0.00</td><td>360,000.00</td><td>Rejected by RFS</td><td>10 Jul 2014</td><td></td><td>View ⧉</td></tr><tr><td>02130016-CF-002</td><td></td><td>10 Jul 2014</td><td></td><td>0.00</td><td>20,000.00</td><td>0.00</td><td>20,000.00</td><td>Paid</td><td>10 Jul 2014</td><td>10 Jul 2014</td><td>View ⧉</td></tr><tr><td>02130016-CF-003</td><td></td><td>3 Oct 2014</td><td></td><td>0.00</td><td>4,000.00</td><td>0.00</td><td>4,000.00</td><td>Paid</td><td>21 Jan 2015</td><td>2 Feb 2015</td><td>View ⧉</td></tr><tr><td>02130016-CF-004</td><td></td><td>10 Oct 2014</td><td></td><td>0.00</td><td>10,100.00</td><td>0.00</td><td>10,100.00</td><td>Withdrawn</td><td></td><td></td><td>View ⧉</td></tr></table> (1 of 1) 1 20 ▾ Staff (HK$) Other Expenses (HK$) Equipment (HK$) Accumulated Claim (HKD) 0.00 24,000.00 0.00 Available Amount (HKD) 360,000.00 11,000.00 0.00 [Create new claim form] [Export to CSV] [Close]	***Step 4:*** Click "<mark>View</mark>" the Claim Form.
Payment Date / **Actions** / View / 📄 (PDF icon)	***Step 5:*** 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 6:*** Click "<mark>Open</mark>" or "<mark>Save</mark>".
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. : Project Title : Project Commencement Date : Project End Date : Administering Institution (AI) (Payee Name) : Period of Claim : From To **Details of Expenditure:** <table><tr><th>Category of Expenditure</th><th>Amount (HK$)</th><th>Remarks</th></tr></table>	***Step 7:*** - Print pdf file for signature by FO and PA. - Send the signed copy to RFS.

Submission of Change Request

	Step 1: Go to Project > On-going or Go to Project > Completion
	Step 2: Click "More".
	Step 3: Click "Change Request".

Change Request Summary Project Reference No. C▓▓▓▓▓ Project Title 120▓▓▓ Start Date 1 Oct 2014 End Date 31 Oct 2016 Status Closed Principal Applicant (PA) P▓▓▓ Administering Institution (AI) Th▓▓▓ **Project Period** | Study Design | Budget Virement | Submission Date of Report | Project Team / AI | Early Termination (1 of 1) |<< 1 >>| 20 ⌄ <table><tr><td>Change Request No.</td><td>Submitted By</td><td>Last Edited By</td><td>Original End Date</td><td>New End Date</td><td>Submission Date</td><td>Accepted Date</td><td>Status</td><td>Decision Email Sent Date</td><td>Actions</td></tr><tr><td>02130016-CR-2</td><td></td><td></td><td>30 Sep 2016</td><td>31 Dec 2016</td><td>10 Jul 2014</td><td></td><td>Rejected</td><td>N/A</td><td>View</td></tr><tr><td>02130016-CR-3</td><td></td><td></td><td>30 Sep 2016</td><td>31 Oct 2016</td><td>10 Jul 2014</td><td>10 Jul 2014</td><td>Accepted</td><td>N/A</td><td>View</td></tr></table> (1 of 1) |<< 1 >>| 20 ⌄ Create Change Request Export to CSV Close	***Step 4:*** Click the type of change request to be submitted. (Remark: Change request for PA or AI must be endorsed by RO.)
Create Change Request **Export to CSV** **Close** Project Period | Study Design | Budget Virement | Submission Date of Report | Project Team / AI | PA | CoA | AI (1 of 1) |<< 1 >>| 20 ⌄ <table><tr><td>Change Request No.</td><td>Submitted By</td><td>Last Edited By</td><td>Original End Date</td><td>New End Date</td><td>Submission Date</td><td>Accepted Date</td><td>Status</td><td>Decision Email Sent Date</td><td>Action</td></tr><tr><td>13140041-CR-001</td><td>PA</td><td>Prof UNIA PA</td><td>31 Aug 2016</td><td>30 Sep 2016</td><td>13 Jul 2016</td><td>13 Jul 2016</td><td>Accepted</td><td>N/A</td><td>View</td></tr><tr><td>13140041-CR-004</td><td>PA</td><td>Prof UNIA PA</td><td>30 Sep 2016</td><td>28 Feb 2025</td><td>23 May 2023</td><td></td><td>Submitted</td><td>N/A</td><td>View</td></tr></table> (1 of 1) |<< 1 >>| 20 ⌄ Create Change Request Export to CSV Close	***Step 5:*** Click "Create Change Request". (Remark: If there is outstanding change request pending RFS' approval, PA cannot create another new request in the same category.)

Project Period Change Request No. [____] Submission Date [____] Change Request Status [____] Original End Date 31 Mar 2015 New End Date [____] **Supporting documents** Please provide revised timetable of work (Section 13j) (in PDF format only and the maximum file size is 600KB) for the change request. (1 of 1) << >> 20 ▾ **Filename** — **Remove** No record (1 of 1) << >> 20 ▾ [Attach] **Justifications** Justifications [_____]	***Step 6a:*** - Input the proposed end date. - Attach supporting documents - Provide justifications.
Study Design Study Design [_____] Please provide the revised proposal (Section 13) including the revised Timetable of Work (item 13j) in both track-change and cl... Track-change version (in PDF format only and the maximum file size is 1MB) [____] [Browse] [Delete] Clean version (in PDF format only and the maximum file size is 1MB) [____] [Browse] [Delete] Attachment (if any) (in PDF format only and the maximum file size is 1MB) [____] [Browse] [Delete] Remarks [_____] **Justifications** Justifications [_____]	***Step 6b:*** - Input the details for the change of study design. - Attach revised proposal in track-change version & clean version - Attach other supporting document (if any). - Provide details for revised work plan, if any, under Remarks Provide justifications.

Budget Virement

Staff Details - Project Staff

Type of Staff	Rank	Pay Scale and Point	Part Time (P) or Full Time (F)	No. (A)	Monthly Salary $ (M) or Hourly Rate (R)	Efforts on Project (C) % / Total Hours on Project (C) (H)	No. of Months (D)	Adjustment (E) (HK$)	AxB(M)xC(%)xD+E; or AxB(R)xC(H)+E HK$	Claimed Amount (HK$)	Action
1	1	1	F	1	20000.0 (M)	100.00	18.0		360,000.00	0.00	🗑
1	1	1	F ▾	1	20,000.00 M ▾	100.00	18		360,000.00		
2	3	1	F	1	20000.0 (M)	100.00	18.0		360,000.00	0.00	🗑
2	3	1	F ▾	1	20,000.00 M ▾	100.00	18		360,000.00		

[Add Project Staff]

Staff Details - Other Supporting Staff (e.g. secretarial, clerical, administrative positions, etc.)

Type of Staff	Rank	Pay Scale and Point	No. (A)	Salary/Month (B) (HK$)	Efforts on Project (C) %	No. of Months (D)	Adjustment (E) (HK$)	Total (HK$) (A*B*C*D)+ (E)	Claimed Amount (HK$)	Action
No records found.										

[Add Support Staff]

Other Expenses

Financial Year (dd/mm/yyyy)	01/04/15 - 31/03/16	01/04/16 - 31/03/17	01/04/17 - 31/03/18	Total (HK$)	Claim
OE item 1	10,000.00	10,000.00	0.00	20,000.00	
OE item 1	10,000.00	10,000.00	0.00	20,000.00	
OE item 2	0.00	20,000.00	0.00	20,000.00	
OE item 2	0.00	20,000.00	0.00	20,000.00	
Conference	0.00	0.00	20,000.00	20,000.00	
Conference	0.00	0.00	20,000.00	20,000.00	
Audit Fee	0.00	0.00	5,000.00	5,000.00	
Audit Fee	0.00	0.00	5,000.00	5,000.00	
Subtotal	10,000.00	30,000.00	25,000.00	65,000.00	

Claimed Amount (HK$)	Action
0.00	🗑

Step 6c:

Input the new proposed budget amount.

- Click " 🗑 " to remove budget item.

(Remark: Any budget item has already been reimbursed cannot be removed.)

Add Project Staff

Staff Details – Project Staff

Type of Staff	
Rank	
Pay Scale and Point	
Part Time (P) or Full Time (F)	P ▼
No. (A)	
Monthly Salary $ (M) or Hourly Rate (R)	M ▼
Efforts on Project (C) % / Total Hours on Project (C) (H)	
No. of Months (D)	
Adjustment (E) (HK$)	
AxB(M)xC(%)xD+E; or AxB(R)xC(H)+E HK$	

Save   Cancel

Add Support Staff

Staff Details – Other Supporting Staff

Type of Staff	
Rank	
Pay Scale and Point	
Part Time (P) or Full Time (F)	P ▼
No. (A)	
Monthly Salary $ (M) or Hourly Rate (R)	M ▼
Efforts on Project (C) % / Total Hours on Project (C) (H)	
No. of Months (D)	
Adjustment (E) (HK$)	
AxB(M)xC(%)xD+E; or AxB(R)xC(H)+E HK$	

Save   Cancel

- Click "Add Project Staff" or "Add Support Staff" or "Add Other Expenses" or "Add Equipment" to add a new budget item(s).

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

Add Other Expense **Other Expenses** Detailed Item Year 1 Year 2 From Year 3 onwards Total (HK$) Save Cancel **Add Equipment** **Equipment** Detailed Item Year 1 Year 2 From Year 3 onwards Save Cancel Unit Cost (HK$) No. of Unit Total (HK$)	
Submission Date of Report Change Request No. Submission Date Change Request Status Original Due Date 9 Mar 2015 New Due Date Report Type Progress Report **Justifications** Justifications	***Step 6d:*** - Input the proposed submission date of report(s). - Provide justifications. (Remark: This request will not change the completion date of the project.)

Project Team / AI

Original PA

☑ Change of PA   ☐ Change of CoA   ☐ Change of AI

New PA

Title

Last Name   First Name

Current Post(s)

Department

Full Address

Institution   The University A

Room / Floor

Building

Street

City / Area

Country / Region   China - Hong Kong

Contact No.   Fax

Mobile No.   No. of hrs/week on project

Email   Personal Email

Position and Honours (in reverse chronological order with dates)

Five Most Recent Relevant Publications and Description of Relevant Experience

Role and Responsibility in the Project

Supporting documents

Please provide supporting documents (in PDF format only and the maximum file size is 600KB) for the change request, including 1) endorsement letter(s) from old AI representative and Department Head, 2) endorsement letter(s) from new PA and new Department Head, and 3) supporting letter(s) / acknowledgement from CoA(s).

(1 of 1)   <<   >>   20 ▾

Filename
No record

(1 of 1)   <<   >>   20 ▾

[Attach]

Justifications

Justifications

Step 6ei:

- Select "Change of PA"

- Fill in details, full address and CV of New PA

- Attach supporting document(s)

- Provide justifications

Project Team / AI

☐ Change of PA   ☑ Change of CoA   ☐ Change of AI

Existing CoA

(1 of 1) ◁◁ **1** ▷▷ 20 ▼

Title	Last Name	First Name	Current Post(s)	Remove Existing CoA
Prof			Professor	No ▼

(1 of 1) ◁◁ **1** ▷▷ 20 ▼

No
Yes

Add Please Select ▼ extra co-Applicant(s)

Please Select
1
2
3
4
5
6
7
8
9

Sup... ...ts
Plea... ...g documents (in PDF format only and the maximum file size is 600KB) for the change request, including 1) endorsement lette... ...sentative and Department Head, 2) endorsement letter(s) from new PA and new Department Head, and 3) supporting letter(s) / ackn... ...oA(s).

(1 of 1) ◁◁ ▷▷ 20 ▼

Filename

N...

(1 of 1) ◁◁ ▷▷ 20 ▼

[Remove CoA]

New co-Applicant 1

Title   [Please Select ▼]

Last Name   [_____]   First Name   [____]

Current Post(s) [_____]

Department   [_____]

Full Address

Institution   [_____]

Room / Floor   [_____]

Building   [_____]

Street   [_____]

City / Area   [_____]

Location of Administering Institution   ◉ China - Hong Kong   ○ Overseas

Country / Region   China - Hong Kong

Contact No.   [_____]   Fax   [____]

Email   [_____]   No. of hrs/week on project   [____]

CV
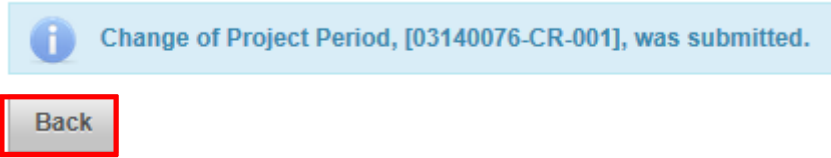
Education/Training   [_____]

Step 6eii:
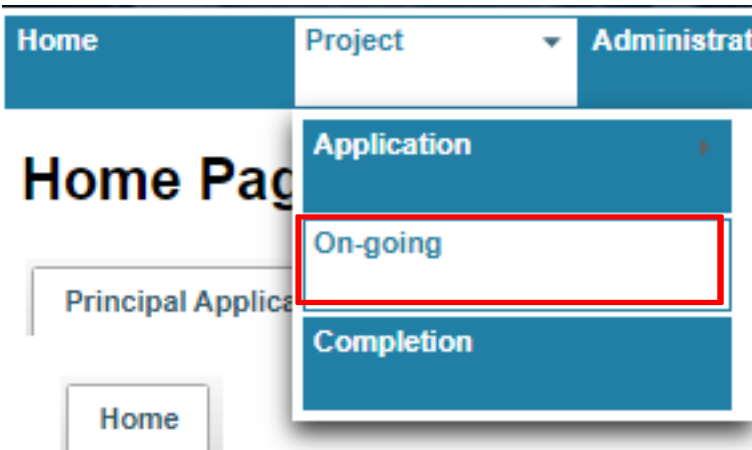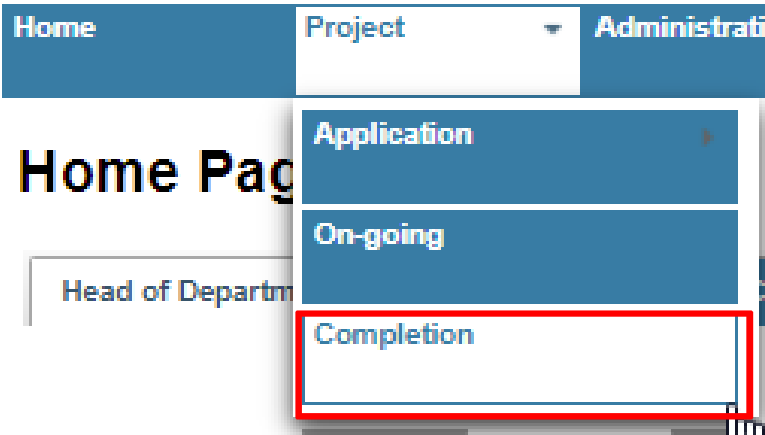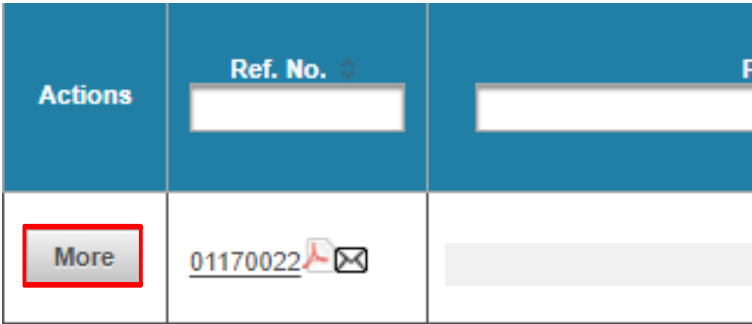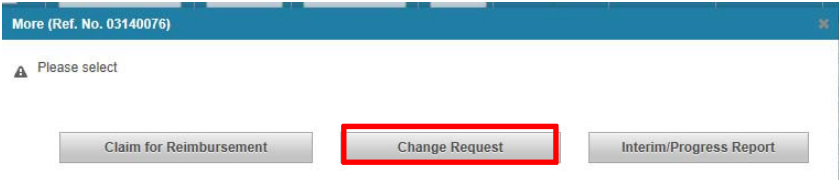
- Select "Change of CoA"

- Select "Yes/No" to remove existing CoA

- Select "1-9" to add extra CoA

- Fill in details, full address and CV of New PA

Position and Honours (in reverse chronological order with dates) [ ] **Five Most Recent Relevant Publications and Description of Relevant Experience** [ ] **Role and Responsibility in the Project** [ ] **Supporting documents** Please provide supporting documents (in PDF format only and the maximum file size is 600KB) for the change request, including 1) endorsement letter(s) from old AI representative and Department Head, 2) endorsement letter(s) from new PA and new Department Head, and 3) supporting letter(s) / acknowledgement from CoA(s). (1 of 1) `<<` `>>` `20 ▼` **Filename** No record (1 of 1) `<<` `>>` `20 ▼` [Attach] **Justifications** Justifications [ ]	- Attach supporting document(s) - Provide justifications
Project Team / AI Original PA [Prof UNIA PA] ☐ Change of PA ☐ Change of CoA ☑ Change of AI **New Administering Institution (AI)** [_____ ▼] **New Department** [Please Select ▼] **New Contact of PA** Title [Prof] Last Name [UNIA] First Name [PA] New Post [ ] Department [ ] **Full Address** Room / Floor [ ] Building [ ] Street [ ] City / Area [ ] Country / Region China - Hong Kong Contact No. [ ] Fax [ ] Email [ ]	***Step 6eiii:*** - Select "Change of AI" - Select new AI and department - Fill in details of new contact of PA and full address

Supporting documents Please provide supporting documents (in PDF format only and the maximum file size is 600KB) for the change request, including 1) endorsement letter(s) from old AI representative and Department Head, 2) endorsement letter(s) from new PA and new Department Head, and 3) supporting letter(s) / acknowledgement from CoA(s). (1 of 1) `<<` `>>` `20 ∨` **Filename** No record (1 of 1) `<<` `>>` `20 ∨` [Attach] **Justifications** Justifications [ ]	- Attach supporting document(s) - Provide justifications
Early Termination Original End Date [30 Sep 2023] Proposed Termination Date [ ] **Supporting documents** Please provide a copy of endorsement from Head of Department (in PDF format only and the maximum file size is 600KB) for the change request. (1 of 1) `<<` `>>` `20 ∨` **Filename** **Remove** No record (1 of 1) `<<` `>>` `20 ∨` [Attach] **Justifications** Justifications [ ]	***Step 6f:*** - Select "Proposed Termination Date" - Attach supporting document(s) - Provide justifications
[Cancel] [Temp Save] [Preview] [**Submit**] **Confirm** ⚠ Are you sure to submit this change request? [Yes] [No]	***Step 7:*** - Click the action button to proceed. - Click "Yes" to proceed the submission to RO of existing AI. OR - Click "Temp Save" to save the request in the eGMS for submission later.

	OR - Click "Preview" to view the details of the request before submission. OR Click "Cancel" to cancel the submission action.
Change of Project Period, [03140076-CR-001], was submitted. Back	*Step 8:* Click "Back" to close the change request action.

View the Progress of Change Request

	Step 1: Go to Project > On-going or Go to Project > Completion
	Step 2: Click "More". .
	Step 3: Click "Change Request".

Change Request Summary

Project Reference No.	0
Project Title	120
Start Date	1 Oct 2014
End Date	31 Oct 2016
Status	Closed
Principal Applicant (PA)	F
Administering Institution (AI)	Th

| Project Period | Study Design | Budget Virement | Submission Date of Report | Project Team / AI | Early Termination |

(1 of 1) ‹‹ **1** ›› 20 ▾

Change Request No.	Submitted By	Last Edited By	Original End Date	New End Date	Submission Date	Accepted Date	Status	Decision Email Sent Date	Actions
02130016-CR-2			30 Sep 2016	31 Dec 2016	10 Jul 2014		Rejected	N/A	View
02130016-CR-3			30 Sep 2016	31 Oct 2016	10 Jul 2014	10 Jul 2014	Accepted	N/A	View

(1 of 1) ‹‹ **1** ›› 20 ▾

| Create Change Request | Export to CSV | Close |

Step 4:

- Click the type of change request to be previewed.
- Click "View".

Withdraw the Change Request

	Step 1: Go to Project > On-going or Go to Project > Completion
	Step 2: Click "More".
	Step 3: Click "Change Request".

Change Request Summary

Project Reference No. | 0[____]
Project Title | 12[____]
Start Date | 1 Oct 2014 | End Date | 31 Oct 2016 | Status | Closed
Principal Applicant (PA) | [____]
Administering Institution (AI) | Th[____]

| Project Period | Study Design | Budget Virement | Submission Date of Report | Project Team / AI | Early Termination |

(1 of 1) ◄◄ **1** ►► 20 ∨

Change Request No.	Submitted By	Last Edited By	Original End Date	New End Date	Submission Date	Accepted Date	Status	Decision Email Sent Date	Actions
02130016-CR-2			30 Sep 2016	31 Dec 2016	10 Jul 2014		Rejected	N/A	View
02130016-CR-3			30 Sep 2016	31 Oct 2016	10 Jul 2014	10 Jul 2014	Accepted	N/A	View

(1 of 1) ◄◄ **1** ►► 20 ∨

Create Change Request | Export to CSV | Close

Change Request No. | 09210356-CR-001 | Submission Date | 24 May 2023 | Change Request Status | Submitted
Original End Date | 14 Mar 2025 | New End Date | 26 Mar 2025

Supporting documents

Please provide revised timetable of work (Section 13j) (in PDF format only and the maximum file size is 600KB) for the change request.

(1 of 1) ◄◄ **1** ►► 20 ∨

Filename	Remove
cap.pdf	🗑

(1 of 1) ◄◄ **1** ►► 20 ∨

Attach

Justifications

Justifications | test
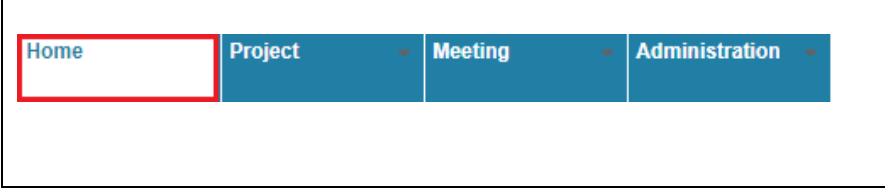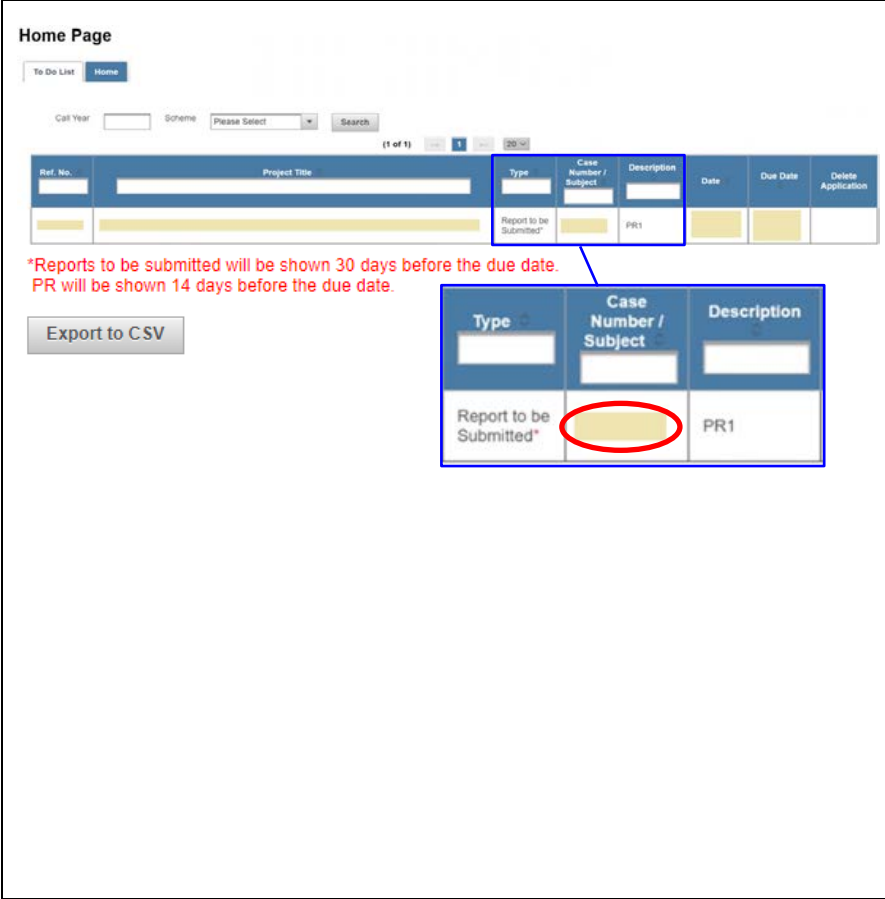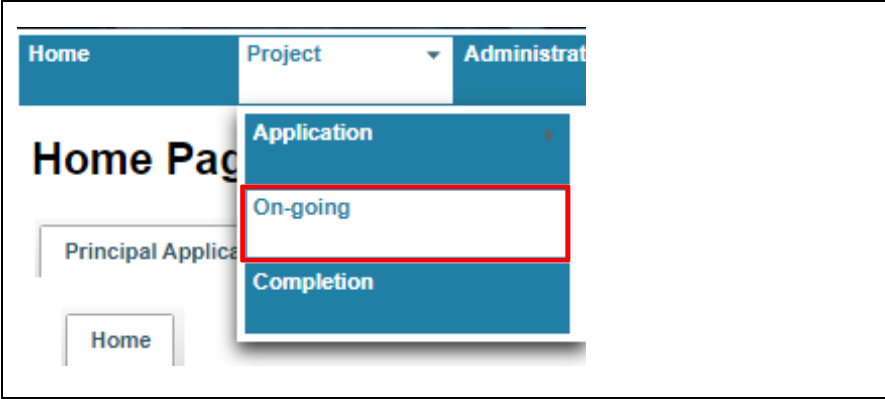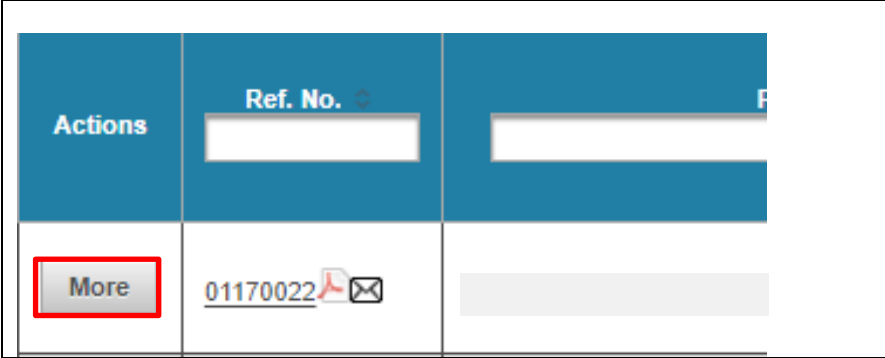
Back | Temp Save | Submit | Withdraw

Confirm

⚠ Are you sure to withdraw this change request?

Yes | No

Step 4:

- Click the type of change request to be previewed.
- Click "View" to preview relevant record to be withdrawn.

(Remark:
Change request which has already been approved/rejected cannot be withdrawn.)

Step 5:

- Click "Withdraw".

- Click "Yes" to proceed.

Submission of Progress Report

	Method A ***Step 1:*** Go to Home
	Step 2: Go to To Do List - Click the "Case Number / Subject" of the project under type: "Report to be Submitted", Description: "PR" (Remarks: Progress Reports that are pending submission would be shown in the To Do List 14 days before the due date.) Go to ***Step 5***
	Or Method B ***Step 1:*** Go to Project > On- going
	Step 2: Click "More".

More (Ref. No. 03140076) ✕ ⚠ Please select [Claim for Reimbursement] [Change Request] [**Interim/Progress Report**]	***Step 3:*** Click "Interim / Progress Report"

Report

Project Reference No.

Project Title

Start Date   End Date

Principal Applicant (PA)

Administering Institution (AI)

Report Type	Submitted By	Last Edited By	Report Ref. No.	Due Date	No. of Overdue Day(s)	Received Date	Report Status	Email Sent Date	Co-Applicant(s) Signed	Edit	Print
Progress Report			PR1					N/A		Edit	
Interim Report			IR1					N/A		Edit	

[Close]

Step 4:
(Remarks: Overdue reports will be highlighted in red.)

- Select the report to be submitted.
- Click "Edit".

Go to ***Step 5***

Progress Report

Report Ref. No.:   PR1
Report Due Date: 31 May 2023
Report Status:
1. Project No.:
2. Grant Period: Commencement Date: End Date:
3. Title of Project:

Content:

Attachment (if any, in PDF format only and the maximum file size is 1.5MB):

[Browse] [Delete]
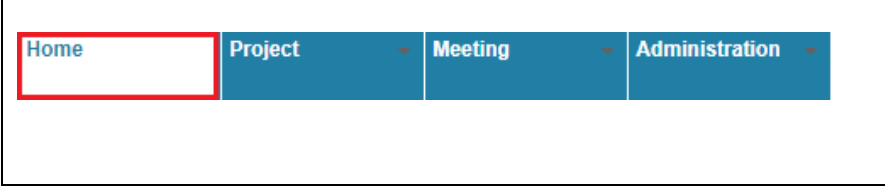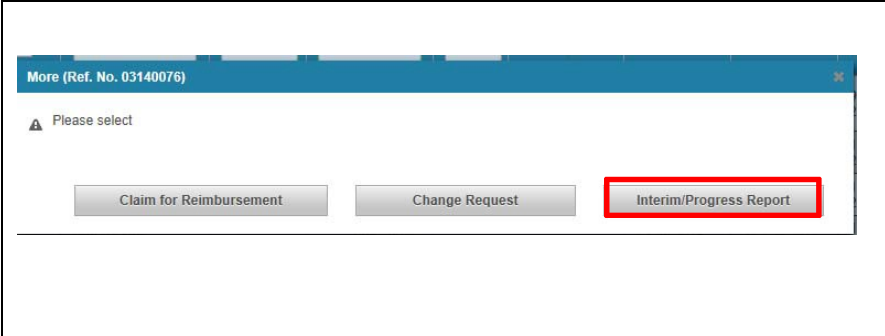
Step 5:

- Note the report reference no. (PR1 means **first** progress report)

- Provide the progress update.

- Attach the supplementary information, if any.

	Step 6: - Click the action button to proceed. - Click "Yes" to proceed the submission to RFS. OR - Click "Temp Save" to save the report in the eGMS for submission later. OR - Click "Preview" to view the details before submission. OR - Click "Close" to cancel the submission action.
	Step 7: Click "Close" to close the submission action.

Revision of Progress Report

	Method A *Step 1:* Go to Home
	Step 2: Go to To Do List - Click the "Case Number / Subject" of the project under type: "Push Back Report", Description: "PR" Go to *Step 4*
	Or Method B *Step 1:* Go to Project > On- going
	Step 2: Click "More".
	Step 3: Click "Interim / Progress Report". Go to *Step 4*

Report										

Report

Project Reference No.

Project Title

Start Date   End Date

Principal Applicant (PA)

Administering Institution (AI)

Report Type	Submitted By	Last Edited By	Report Ref. No.	Due Date	No. of Overdue Day(s)	Received Date	Report Status	Email Sent Date	Co-Applicant(s) Signed	Edit	Print
Progress Report			PR1				Pushed Back	N/A	N/A	Edit	
Interim Report			IR1					N/A		Edit	

Details

Close

⚠ Pushed back by

Reason(s):

Step 4:

- Click "**Pushed Back**" for details entered by RFS.
- Click "Edit"

Progress Report

Report Ref. No.:   PR1
Report Due Date:
Report Status: Pushed Back
1. Project No.:
2. Grant Period: Commencement Date: End Date:
3. Title of Project:

Content:
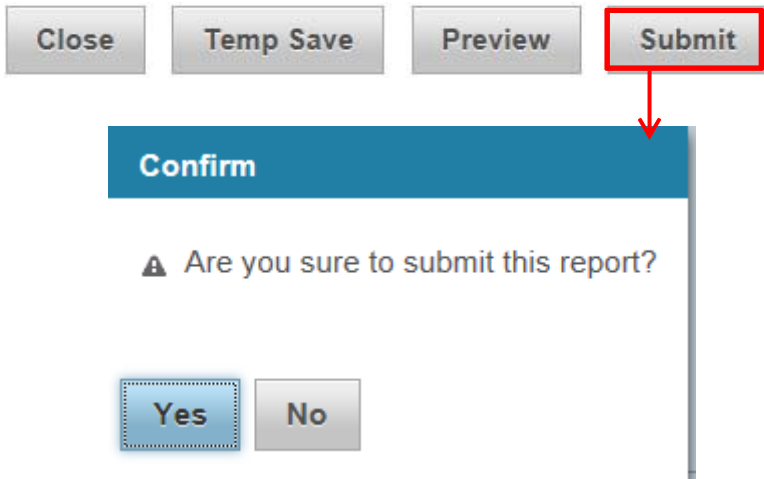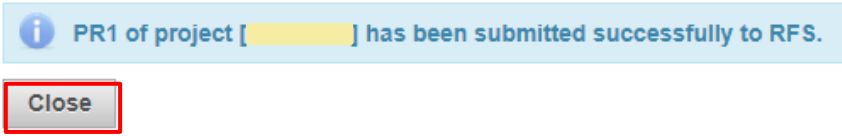
test
push back edit

Attachment (if any, in PDF format only and the maximum file size is 1.5MB):
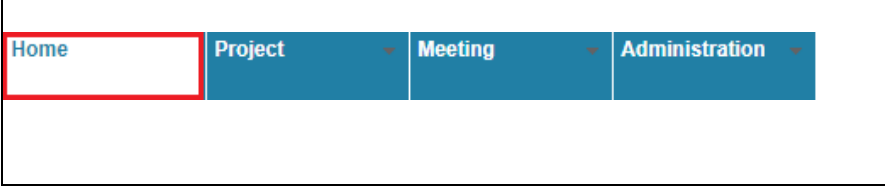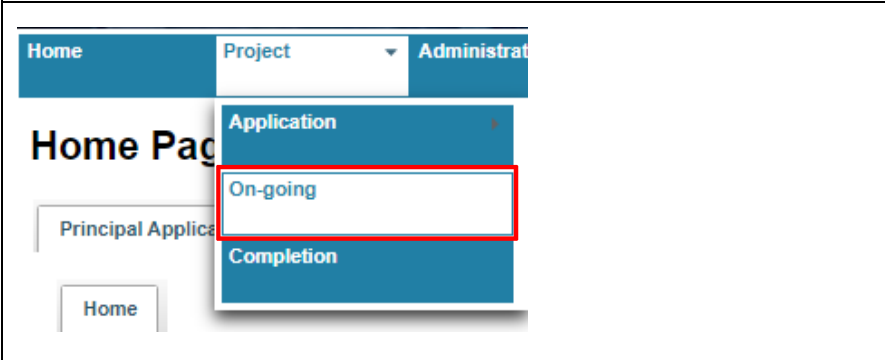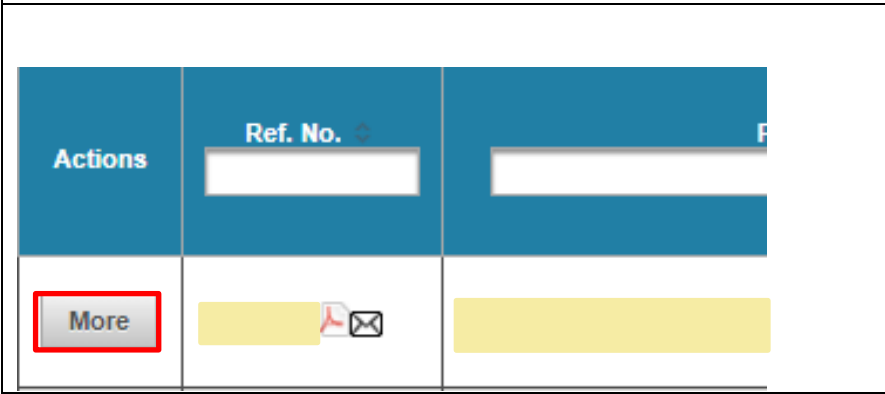
Browse   Delete

Step 5:

- Update the progress report.

- Attach the supplementary information, if any.

Close　Temp Save　Preview　Submit **Confirm** ⚠ Are you sure to submit this report? Yes　No	***Step 6:*** - Click the action button to proceed. - Click "Yes" to proceed the submission to RFS. OR - Click "Temp Save" to save the report in the eGMS for submission later. OR - Click "Preview" to view the details before submission. OR - Click "Close" to cancel the submission action.
Progress Report ⓘ PR1 of project [　　　] has been submitted successfully to RFS. Close	***Step 7:*** Click "Close" to close the submission action.

Submission of Interim Report

	Method A
	Method A
	Step 1:
	Go to Home
	Step 2:
	Go to To Do List
	- Click the "Case Number / Subject" of the project under type: "Report to be Submitted", Description: "IR"
	(Remarks: All reports that are pending submission would be shown in the To Do List 30 days before the due date.)
	Go to ***Step 5***
	Or Method B
	Step 1:
	Go to Project > On- going
	Step 2:
	Click "More".

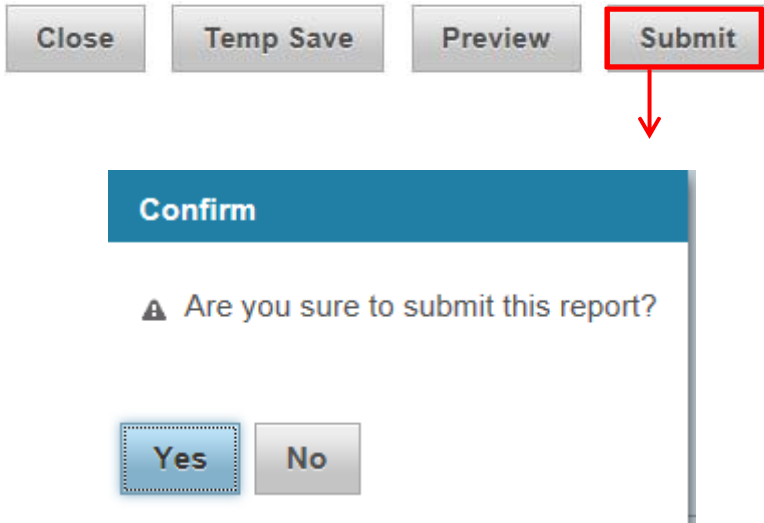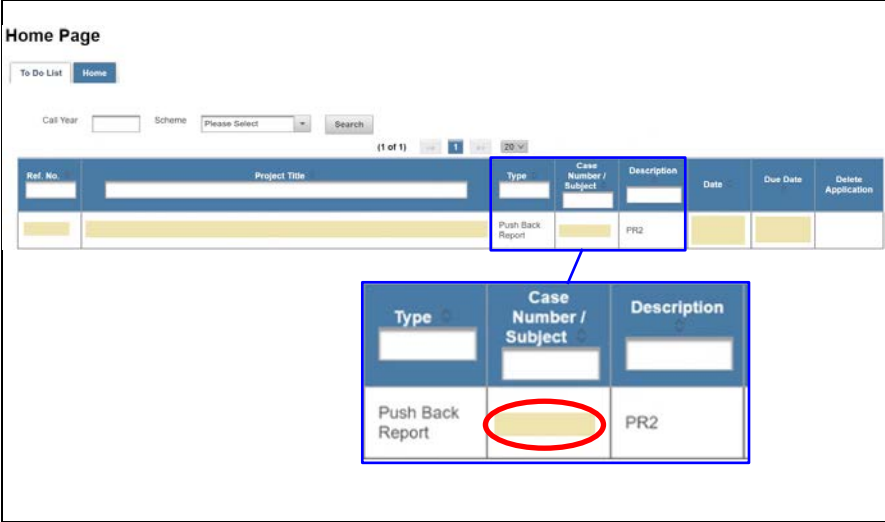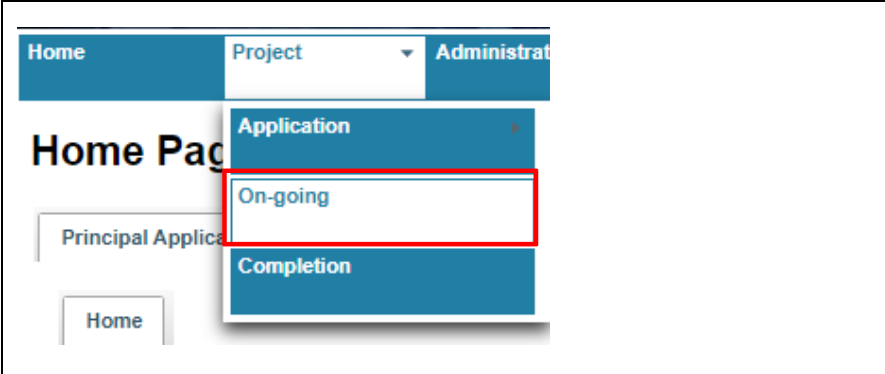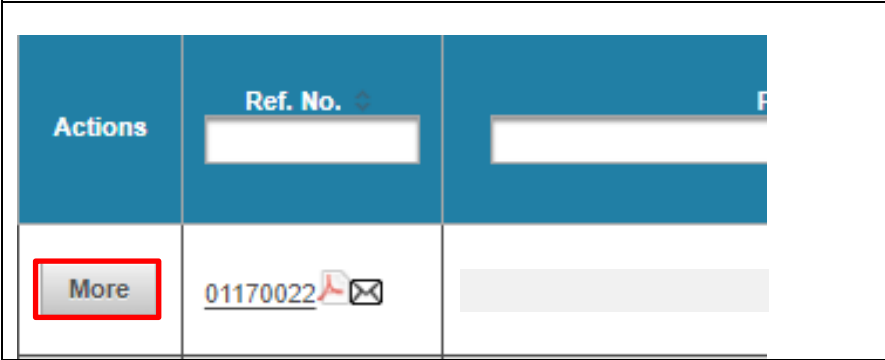|	
	Step 3:
	Click "==Interim / Progress Report=="
	Step 4:
	(Remarks: Overdue reports will be highlighted in red.)
	- Select the report to be submitted.
	- Click "==Edit==".
	[Go to ***Step 5***](#)
	Step 5a:
	- Note the report ref. no. (IR1 means first interim report)
	- Indicate any submission of change request(s)
	- Select "==Yes==" if change request was submitted, choose the type of Change Request submitted and provide the corresponding Sequence No.
	- Click "==Add==" if more than 1 Change Request was submitted.

6. Aims/Objectives of the Research:

List the main objectives as stated in the approved proposal. Approval must be sought for any changes on the study objectives.

Approved Aims/Objectives	Estimated completion (%)	Delete
		🗑

[Add]

7. Timetable of Work:

Document the study progress according to the proposed timetable.

Date	Event/Progress	Delete
		🗑

[Add]

8. Achievements/Major Findings of the Project so far:

9. Budget & Expenditure (attach a certified Financial Statement, in PDF format only and the maximum file size is 1.5MB):

Remarks: Please submit a signed hardcopy to RFS. Attachments are optional, but they must be in PDF format if they are attached to the report.

[____] [Browse] [Delete]

10. Applicants' Comments:

Describe the potential for further investigations or exploitation of results. May include reflection/feedback of investigators and/or any difficulties encountered during the course of project. Comment on the potential for current dissemination of research findings.

11. Publications, including in press

Have any publications resulting directly from this research project been published?
◉ Yes ○ No

If YES, provide details below. Include published or in press items only. Do not include manuscripts in preparation or submitted for review. Insert additional lines below, if necessary.

	Details	Delete
1		🗑

[Add]

12. Patents and other Intellectual Property Rights

Have any patents or other intellectual property rights resulting directly from this research project been produced?
◉ Yes ○ No

If YES, provide details below. PA/AI should seek written consent from the Government before filing a patent application. Insert additional lines below, if necessary.

	Details	Delete
1		🗑

[Add]

Attachment (if any, in PDF format only and the maximum file size is 1.5MB):

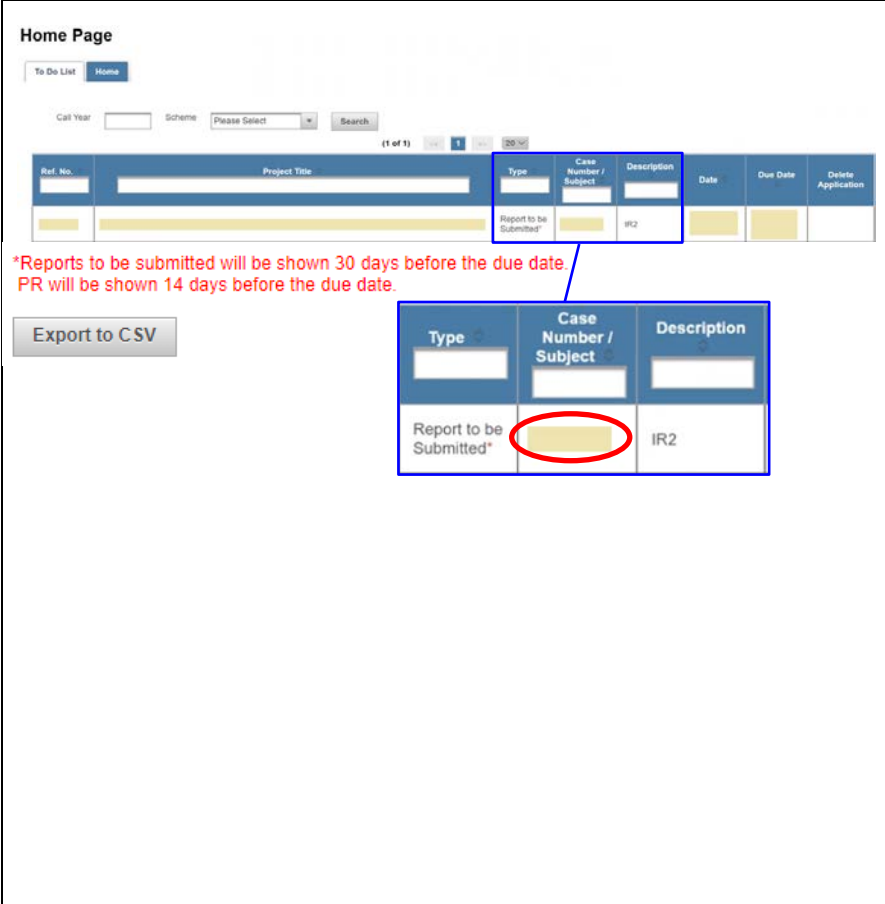[____] [Browse] [Delete]

- Complete the Interim Report and attach the supplementary information, if any

(Interim Report for the Area of Project: Public health, human health and health services research; Infectious diseases or Advanced medical research)

6. Aims/Objectives of the Project:

List the main objectives as stated in the <u>approved proposal</u>. Approval must be sought for any changes on the project objectives.

Approved Aims/Objectives	Estimated completion (%)	Delete
		🗑

[Add]

7. Timetable of Work:

Document the project progress according to the proposed timetable.

Date	Event/Progress	Delete
		🗑

[Add]

8. Benefits/ Outcome of the Project so far:

9. Budget & Expenditure (attach a <u>certified Financial Statement</u>, in PDF format only and the maximum file size is 1.5MB):

Remarks: Please submit a signed hardcopy to RFS. Attachments are optional, but they must be in PDF format if they are attached to the report.

[   ] [Browse] [Delete]

10. Applicants' Comments:

May include reflection/feedback of applicants and/or any difficulties encountered during the course of project. Comment on the potential for current dissemination of project outcome.

11. Publications, including in press

Have any publications resulting directly from this project been published?
○ Yes ○ No

12. Patents and other Intellectual Property Rights

Have any patents or other intellectual property rights resulting directly from this project been produced?
○ Yes ○ No

Attachment (if any, in PDF format only and the maximum file size is 1.5MB):

[   ] [Browse] [Delete]
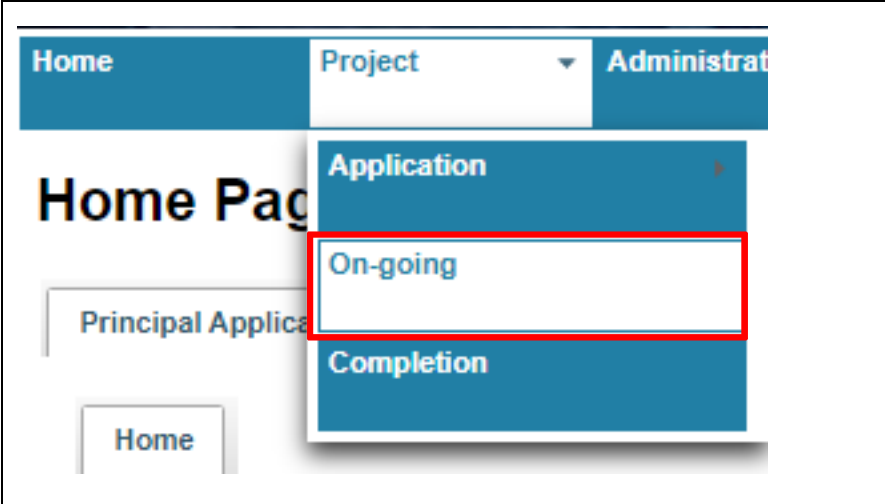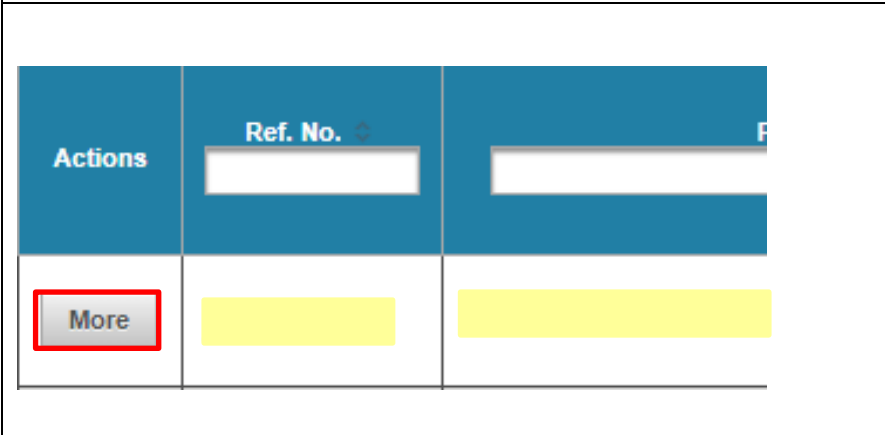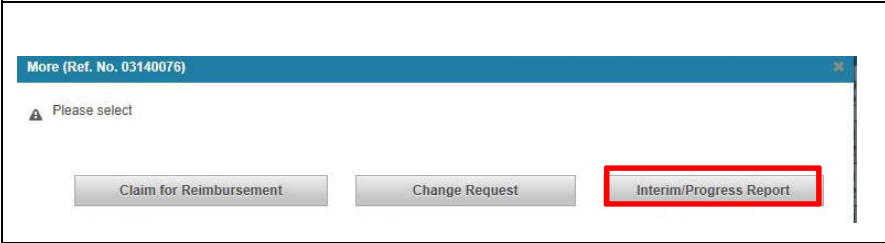
(Assessment form for the Area of Project: Health Promotion)

☐ I hereby confirm this report is endorsed by the whole project team. (Note: If the checkbox is clicked, further endorsement will not be required from CoA after submission in step 6.	***Step 5b :*** (Optional) : applicable for project with CoA(s) only Click 'I hereby confirm this report is endorsed by the whole project team'
 Close **Temp Save** **Preview** **Submit** **Confirm** ⚠ Are you sure to submit this report? **Yes** **No**	***Step 6:*** - Click the action button to proceed. - Click "Yes" to submit the IR to RO. OR - Click "Temp Save" to save the report in the eGMS for submission later. OR - Click "Preview" to view the details before submission. OR - Click "Close" to cancel the submission action.

Interim Report

ℹ️ The latest version of IR1 of project   has been submitted successfully to RO of AI, pending endorsement from RO, if any.

[Close]

Remark : Acknowledge message for PA did not click the checkbox in *Step 5b*

Interim Report

ℹ️ The latest version of IR1 of project   has been submitted successfully to RO of AI, pending endorsement from RO and CoA(s), if any.

[Close]

Step 7:

Click "Close" to close the submission action.

The report has been submitted and is pending signature(s) from CoA (if any) and AI users.

Resend Invitation Email to CoA for Endorsement of the Interim Report
(Note: If you have submitted the Interim Report with clicking the checkbox (i.e. *Step 5b* in Submission of Interim Report), please ignore this part)

	Step 1: Go to Project > On-going
	Step 2: Click "More". .
	Step 3: Click "Interim / Progress Report".

Report

Project Reference No.	
Project Title	
Start Date	End Date
Principal Applicant (PA)	
Administering Institution (AI)	

Report Type	Submitted By	Last Edited By	Report Ref. No.	Due Date	Received Date	Report Status	Email Sent Date	Co-Applicant(s) Signed	Edit	Print
Interim Report	PA		IR1			Pending Signature	N/A	N	View	

Co-Applicant List
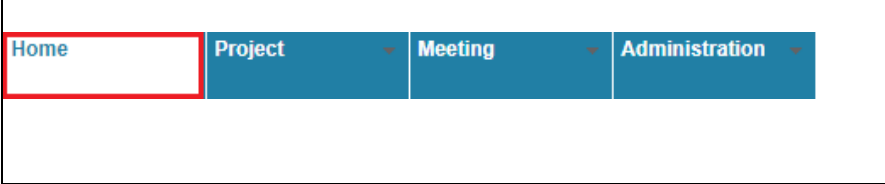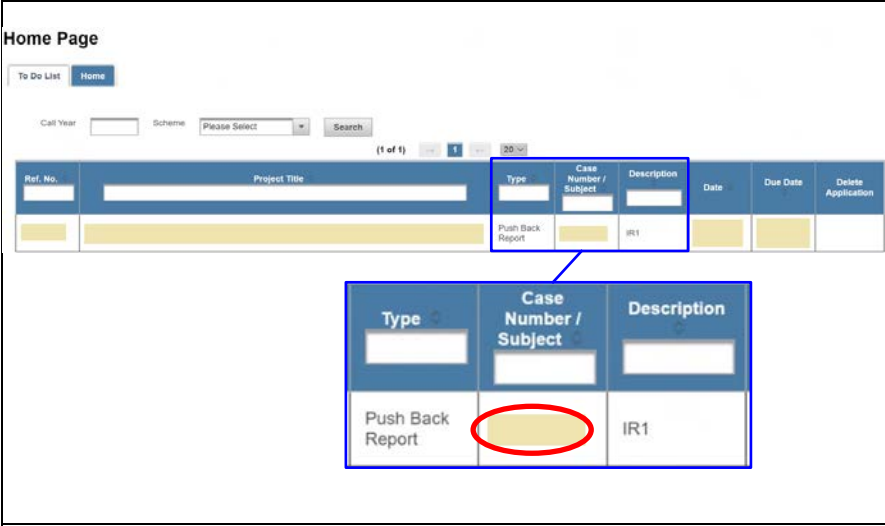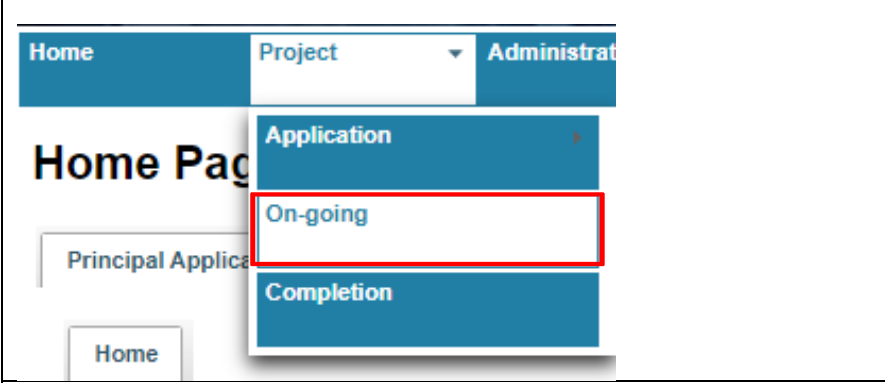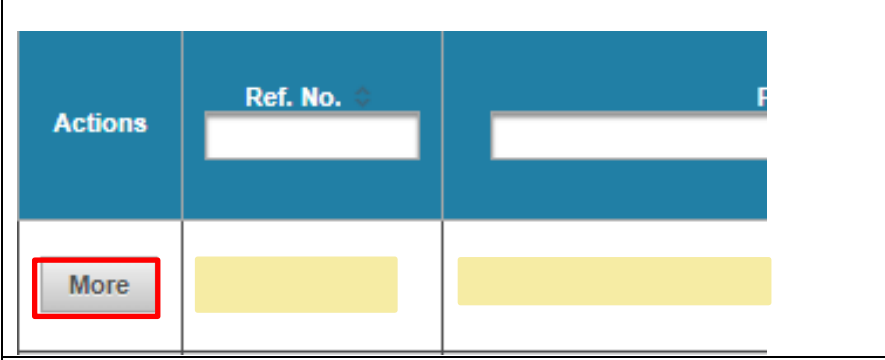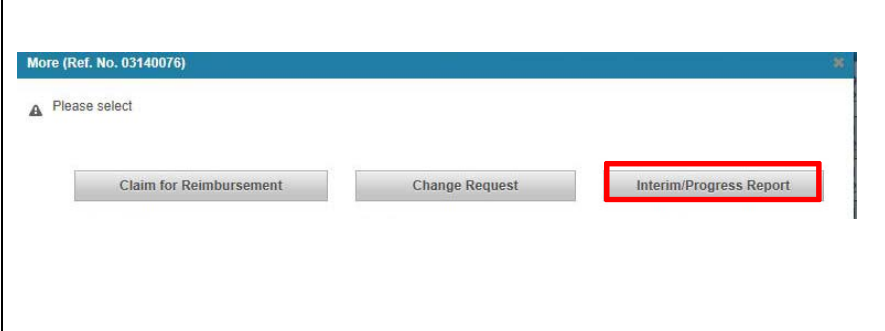
Title	Last Name	First Name	Affiliation	Co-Applicant(s) Signed	Actions
				N	Re-Send

Close

Step 4:

- Click "N" to view the endorsement status from CoA(s).
- Click "Re-Send" to send the invitation email to CoA.
- Click "View" or PDF icon to preview the Interim Report.

Revision of Interim Report

	Method A ***Step 1:*** Go to Home
	Step 2: Go to To Do List - Click the "Case Number / Subject" of the project under type: "Push Back Report", Description: "IR" Go to ***Step 4***
	Or Method B ***Step 1:*** Go to Project > On-going
	Step 2: Click "More".
	Step 3: Click "Interim / Progress Report". Go to ***Step 4***

Report

Project Reference No. [ ]

Project Title [ ]

Start Date [ ] End Date [ ]

Principal Applicant (PA) [ ]

Administering Institution (AI) [ ]

Report Type	Submitted By	Last Edited By	Report Ref. No.	Due Date	No. of Overdue Day(s)	Received Date	Report Status	Email Sent Date	Co-Applicant(s) Signed	Edit	Print
Interim Report			IR1				Pushed Back	N/A	Y	Edit	📄

Close

Details

⚠ Pushed back by [ ]

Reason(s):

[ ]

Step 4:

- Click "Pushed Back" for details entered by CoA or RO or RFS.
- Click "Edit".

Interim Report

Report Ref. No.:   IR1

Report Due Date:

Report Status: Pushed Back

6. Aims/Objectives of the Research:

List the main objectives as stated in the approved proposal. Approval must be sought for any changes on the study objectives.

Approved Aims/Objectives	Estimated completion (%)	Delete
		🗑

Add

7. Timetable of Work:

Document the study progress according to the proposed timetable.

Date	Event/Progress	Delete
		🗑

Add

8. Achievements/Major Findings of the Project so far:

9. Budget & Expenditure (attach a certified Financial Statement, in PDF format only and the maximum file size is 1.5MB):

Remarks: Please submit a signed hardcopy to RFS. Attachments are optional, but they must be in PDF format if they are attached to the report.

🗑

Browse   Delete

10. Applicants' Comments:

Describe the potential for further investigations or exploitation of results. May include reflection/feedback of investigators and/or any difficulties encountered during the course of project. Comment on the potential for current dissemination of research findings.

Step 5:

- Update the Interim Report and attach the supplementary information, if any

(Revised Interim Report for the Area of Project: Public health, human health and health services research; Infectious diseases or Advanced medical research)

11. Publications, including in press

Have any publications resulting directly from this research project been published?

◉ Yes ○ No

If YES, provide details below. Include published or in press items only. Do <u>not</u> include manuscripts in preparation or submitted for review. Insert additional lines below, if necessary.

	Details	Delete
1		🗑

[Add]

12. Patents and other Intellectual Property Rights

Have any patents or other intellectual property rights resulting directly from this research project been produced?

◉ Yes ○ No

If YES, provide details below. PA/AI should seek <u>written consent</u> from the Government <u>before</u> filing a patent application. Insert additional lines below, if necessary.

	Details	Delete
1		🗑

[Add]

6. Aims/Objectives of the Project:

List the main objectives as stated in the approved proposal. Approval must be sought for any changes on the project objectives.

Approved Aims/Objectives	Estimated completion (%)	Delete
		🗑

[Add]

7. Timetable of Work:

Document the project progress according to the proposed timetable.

Date	Event/Progress	Delete
		🗑

[Add]

8. Benefits/ Outcome of the Project so far:

9. Budget & Expenditure (attach a certified Financial Statement, in PDF format only and the maximum file size is 1.5MB):

Remarks: Please submit a signed hardcopy to RFS. Attachments are optional, but they must be in PDF format if they are attached to the report.

[_____] [Browse] [Delete]

10. Applicants' Comments:

May include reflection/feedback of applicants and/or any difficulties encountered during the course of project. Comment on the potential for current dissemination of project outcome.

10. Applicants' Comments:

May include reflection/feedback of applicants and/or any difficulties encountered during the course of project. Comment on the potential for current dissemination of project outcome.

11. Publications, including in press

Have any publications resulting directly from this project been published?

◉ Yes ○ No

If YES, provide details below. Include published or in press items only. Do <u>not</u> include manuscripts in preparation or submitted for review. Insert additional lines below, if necessary.

Details	Delete
1	🗑

[Add]

12. Patents and other Intellectual Property Rights

Have any patents or other intellectual property rights resulting directly from this project been produced?

◉ Yes ○ No

If YES, provide details below. PA/AI should seek <u>written consent</u> from the Government <u>before</u> filing a patent application. Insert additional lines below, if necessary.

Details	Delete
1	🗑

[Add]

Attachment (if any, in PDF format only and the maximum file size is 1.5MB):

[   ] [Browse] [Delete]

[Close] [Temp Save] [Preview] [**Submit**]

Confirm

⚠ Are you sure to submit this report?

[Yes] [No]

Step 6:

- Click the action button to proceed.
- Click "Yes" submit the revised IR. (Note: IR will be sent to CoA(s) if any, for endorsement once the submission is made. RO cannot take any action on the revised IR if CoA(s) has (have) not endorsed the revised IR.)

Close **Temp Save** **Preview** **Submit**	OR - Click "<mark>Temp Save</mark>" to save the report in the eGMS for submission later. OR - Click "<mark>Preview</mark>" to view the details before submission. OR - Click "<mark>Close</mark>" to cancel the submission action.
ⓘ The latest version of IR2 of Project _____ has been submitted successfully to RO of AI, pending endorsement from RO and CoA(s), if any. **Close**	***Step 7:*** Click "<mark>Close</mark>" to close the submission action. The report has been submitted and is pending signature(s) from CoA (if any) and AI users.

Submission of Final and Dissemination Report

	Method A ***Step 1:*** Go to Home
	Step 2: Go to To Do List - Click the "Case Number / Subject" of the project under type: "Report to be Submitted", Description: "FR" (Remarks: All reports that are pending submission would be shown in the To Do List 30 days before the due date.) Go to ***Step 5***
	Or Method B ***Step 1:*** Go to Project > Completion
	Step 2: Click "More".

More (Ref. No. 02140014)   ✖
 	
⚠ Please select
 	
    [Claim for Reimbursement]   [Change Request]
 	
    [**Final/Dissemination Report**]
	Step 3:
	
	Click "<mark>Final /
	Dissemination Report</mark>".

Report

Project Reference No.		
Project Title		
Start Date		End Date
Principal Applicant (PA)		
Administering Institution (AI)		

Report Type	Submitted By	Last Edited By	Report Ref. No.	Due Date	No. of Overdue Day(s)	Received Date	Report Status	Email Sent Date	Co-Applicant(s) Signed	Edit	Print
Final Report			FR1					N/A		Edit	

[Close]

Step 4:
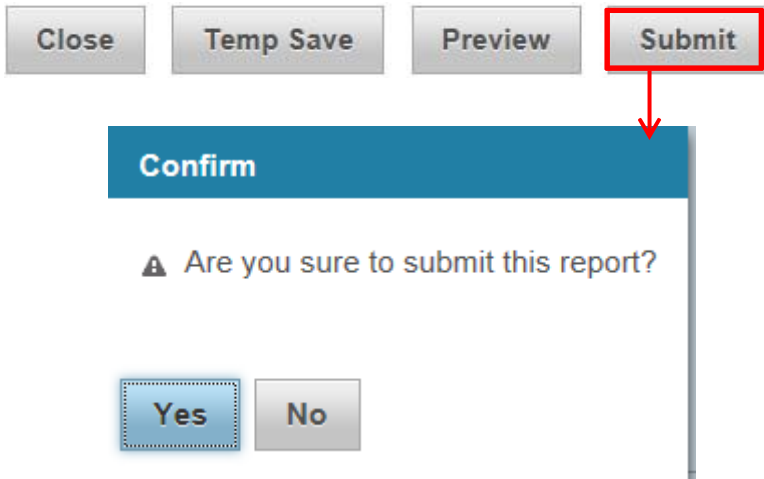
(Remarks: Overdue reports will be highlighted in red.)

- Select the report to be submitted.
- Click "<mark>Edit</mark>".
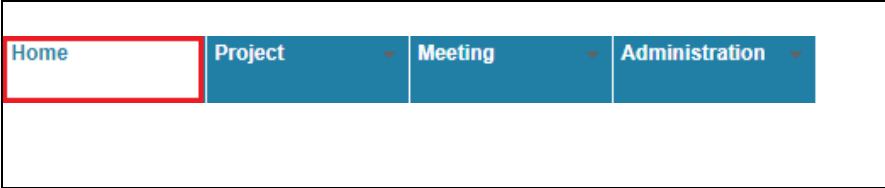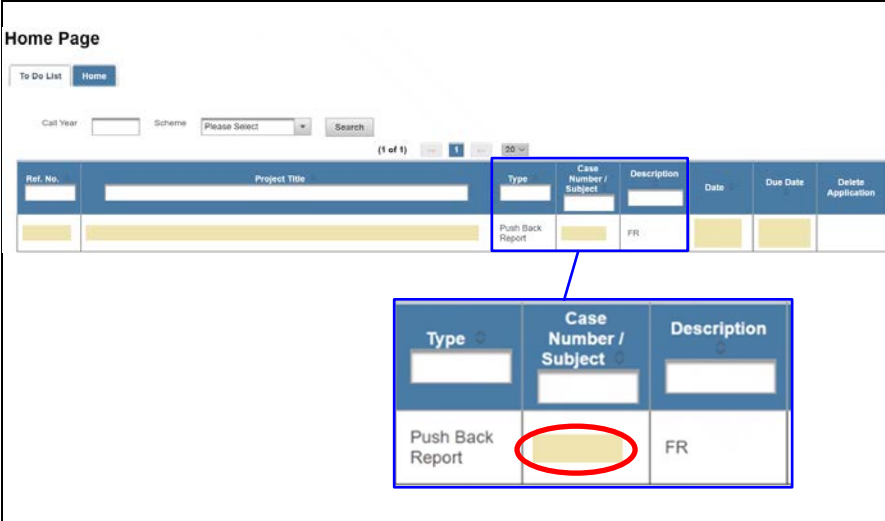
Go to ***Step 5***

Final Report & Dissemination Report

Report Ref. No.	FR1
Project Reference No.	
Project Title	

Actual Start Date		Actual End Date	
Report Status			

* Only PDF and MS Word files are allowed for final and dissemination report.

Upload Final Report

Upload PDF file (in PDF format only and the maximum file size is 1.5MB)

[ ] Browse Delete

Upload Word file (in DOC / DOCX format only and the maximum file size is 1.5MB)

[ ] Browse Delete

Upload Dissemination Report

Upload PDF file (in PDF format only and the maximum file size is 1.5MB)

[ ] Browse Delete

Upload Word file (in DOC / DOCX format only and the maximum file size is 1.5MB)

[ ] Browse Delete

Attachment (if any, in PDF format only and the maximum file size is 1.5MB):

[ ] Browse Delete

Step 5a:

- Upload the report(s).

(Note: Encrypted or protected PDF file cannot be uploaded.)

- Attach supplementary document, if any.

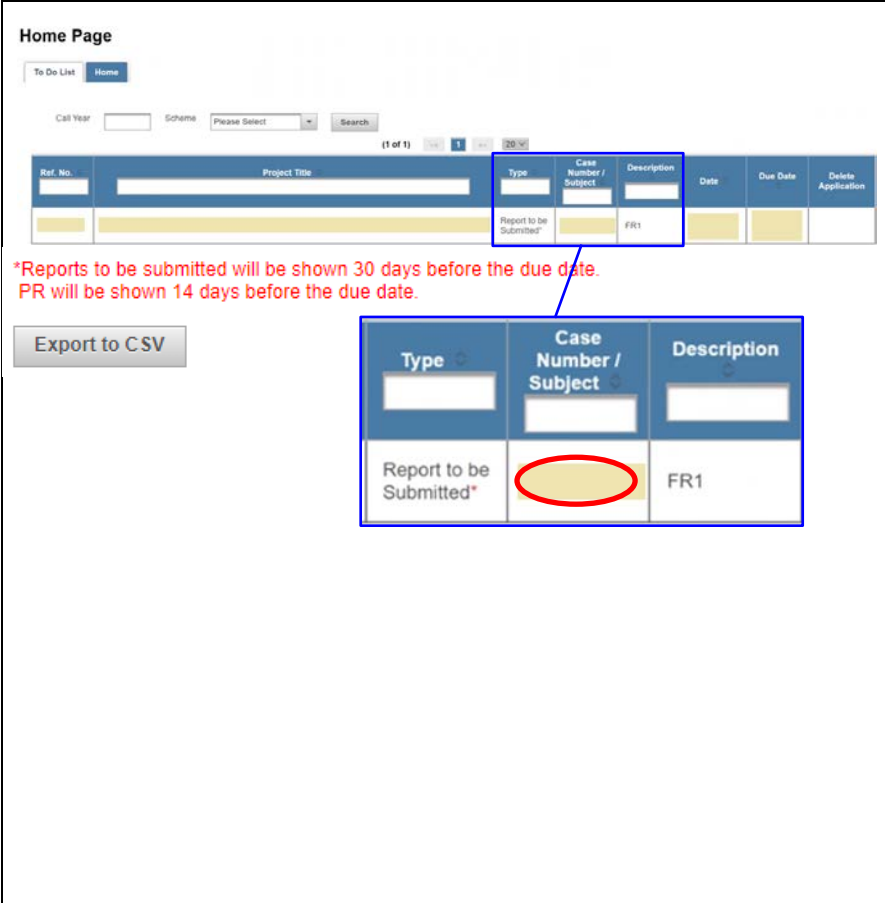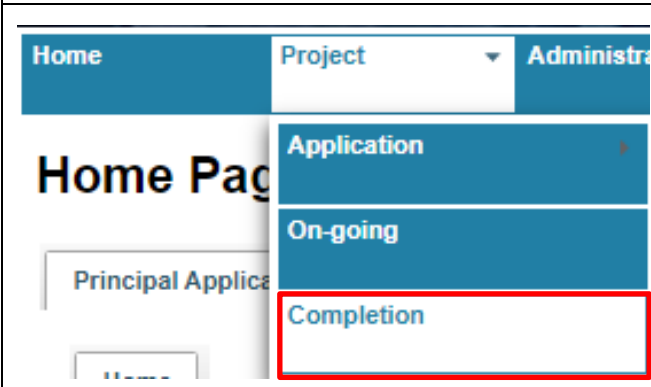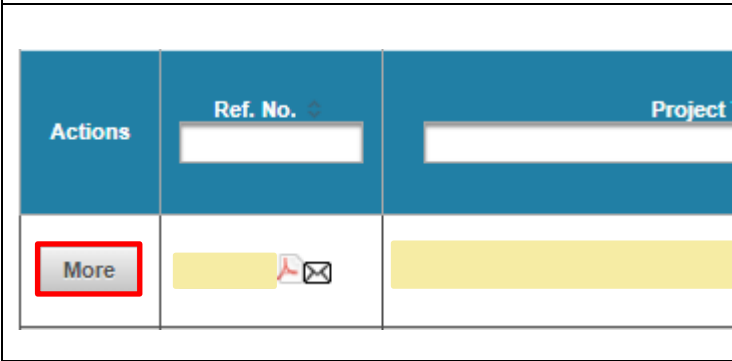|	
Close **Temp Save** **Preview** **Submit** **Confirm** ⚠ Are you sure to submit this report? **Yes** **No**	***Step 6:*** - Click the action button to proceed. - Click "Yes" to proceed the submission the FR to RO. (Note: FR will be sent to CoA(s) if any, for endorsement once the submission is made. RO cannot take any action on the FR if CoA(s) has (have) not endorsed the FR.) OR - Click "Temp Save" to save the report in the eGMS for submission later. OR - Click "Preview" to view the details before submission. OR - Click "Close" to cancel the submission action.

Final Report & Dissemination Report ⓘ The latest version of FR of Project [　　　] has been submitted successfully to RO of AI, pending endorsement from RO and CoA(s), if any. [Close]	*Step 7:* Click "==Close==" to close the submission.

Revision of Final Report

	Method A ***Step 1:*** Go to Home
	Step 2: Go to To Do List - Click the "Case Number / Subject" of the project under type: "Push Back Report", Description: "FR" Go to **_Step 4_**
	Or Method B ***Step 1:*** Go to Project > Completion
	Step 2: Click "More".
	Step 3: Click "Final / Dissemination Report". Go to **_Step 4_**

Report

Project Reference No. ▯

Project Title ▯

Start Date ▯   End Date ▯

Principal Applicant (PA) ▯

Administering Institution (AI) ▯

Report Type	Submitted By	Last Edited By	Report Ref. No.	Due Date	No. of Overdue Day(s)	Received Date	Report Status	Email Sent Date	Co-Applicant(s) Signed	Edit	Print
Final Report	▯	▯	FR1	▯			Pushed Back	N/A		Edit	FR 📄 DR 📄

Close

Details

⚠ Pushed back by ▯

Reason(s):

▯

Step 4:

- Click "<mark>Pushed Back</mark>" for comments by CoA or RO or RFS.

- Click "Edit"

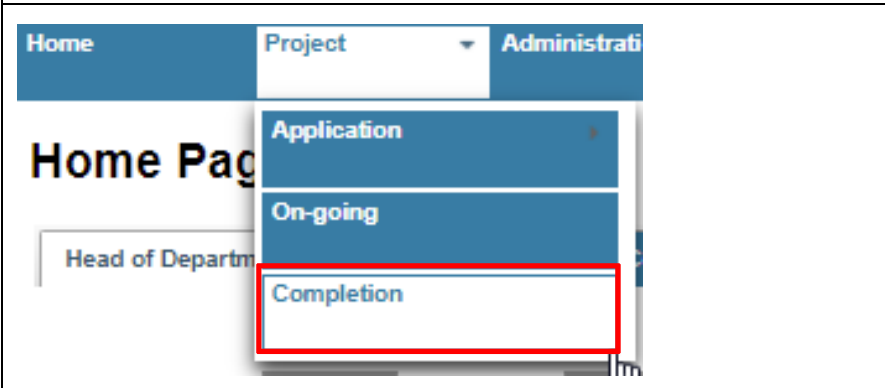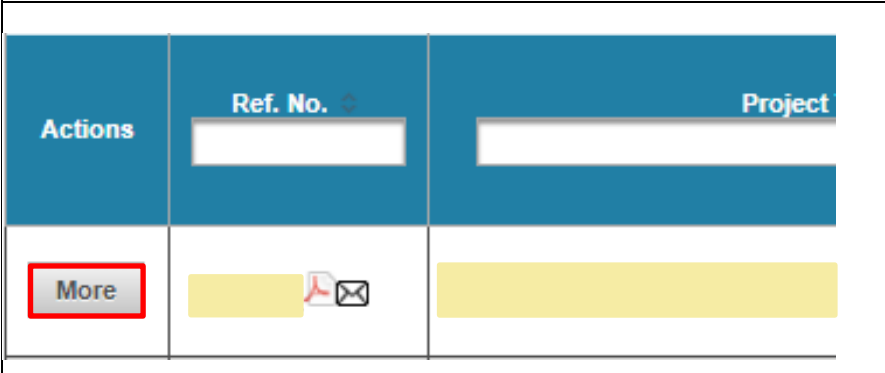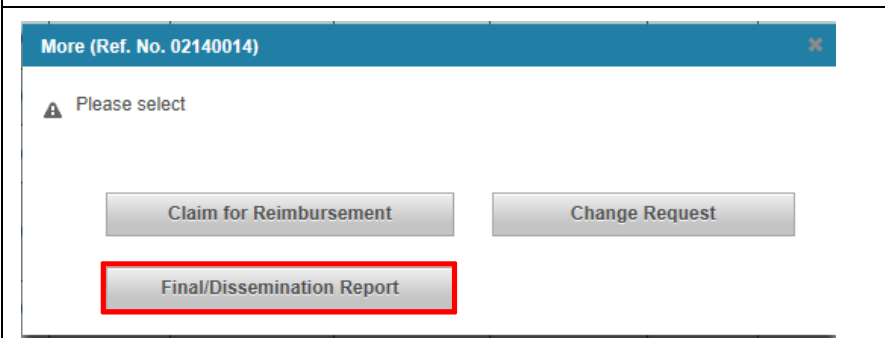|	
Final Report & Dissemination Report Report Ref. No. FR1 Project Reference No. Project Title Actual Start Date 1 Sep 2015 Actual End Date 1 Sep 2017 Report Status Pushed Back * Only PDF and MS Word files are allowed for final and dissemination report. **Upload Final Report** Upload PDF file (in PDF format only and the maximum file size is 1.5MB) test.pdf 🗑 [ ] Browse Delete Upload Word file (in DOC / DOCX format only and the maximum file size is 1.5MB) test.docx 🗑 [ ] Browse Delete **Upload Dissemination Report** Upload PDF file (in PDF format only and the maximum file size is 1.5MB) test.pdf 🗑 [ ] Browse Delete Upload Word file (in DOC / DOCX format only and the maximum file size is 1.5MB) test.docx 🗑 [ ] Browse Delete **Attachment (if any, in PDF format only and the maximum file size is 1.5MB):** test.pdf 🗑 [ ] Browse Delete	***Step 5:*** - Delete the old report(s) - Upload the revised report(s) - Delete and attach supplementary document, if any.

Close Temp Save Preview **Submit** **Confirm** ⚠ Are you sure to submit this report? Yes No	***Step 6:*** - Click the action button to proceed. - Click "Yes" to proceed the submission the revised FR to RO. (Note: revised FR will be sent to CoA(s) if any, for endorsement once the submission is made. RO cannot take any action on the revised FR if CoA(s) has (have) not endorsed the revised FR.) OR - Click "Temp Save" to save the report in the eGMS for submission later. OR - Click "Preview" to view the details before submission. OR - Click "Close" to cancel the submission action.

Final Report & Dissemination Report ⓘ FR1 of project ⬜⬜⬜ has been submitted successfully to RFS. [Close]	***Step 7:*** Click "<mark>Close</mark>" to close the submission

View the Final and Dissemination Report

	Step 1: Go to Project > Completion
	Step 2: Click "More" . .
	Step 3: Click "Final / Dissemination Report".

Report

Project Reference No.	
Project Title	
Start Date	End Date
Principal Applicant (PA)	
Administering Institution (AI)	

Report Type	Submitted By	Last Edited By	Report Ref. No.	Due Date	No. of Overdue Day(s)	Received Date	Report Status	Email Sent Date	Co-Applicant(s) Signed	Edit	Print
Final Report			FR1				submitted to RFS	N/A	Y	View	FR 📄 DR 📄

Close

Final Report & Dissemination Report

Report Ref. No.	FR1
Project Reference No.	
Project Title	

Actual Start Date	1 Sep 2015	Actual End Date	1 Sep 2017
Report Status	submitted to RFS		

Upload Final Report

Upload PDF file (in PDF format only and the maximum file size is 1.5MB)
test.pdf

Upload Word file (in DOC / DOCX format only and the maximum file size is 1.5MB)
test.docx

Upload Dissemination Report

Upload PDF file (in PDF format only and the maximum file size is 1.5MB)
test.pdf

Upload Word file (in DOC / DOCX format only and the maximum file size is 1.5MB)
test.docx

Attachment (if any, in PDF format only and the maximum file size is 1.5MB):

test.pdf

Step 4a:

Click PDF icon to download the report(s).
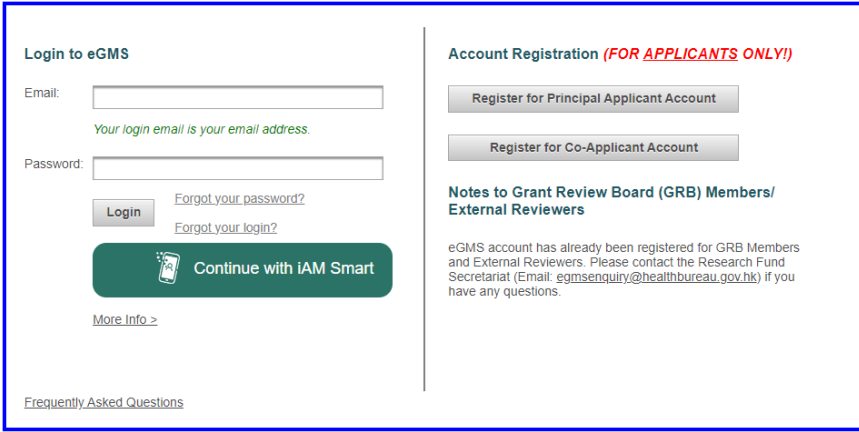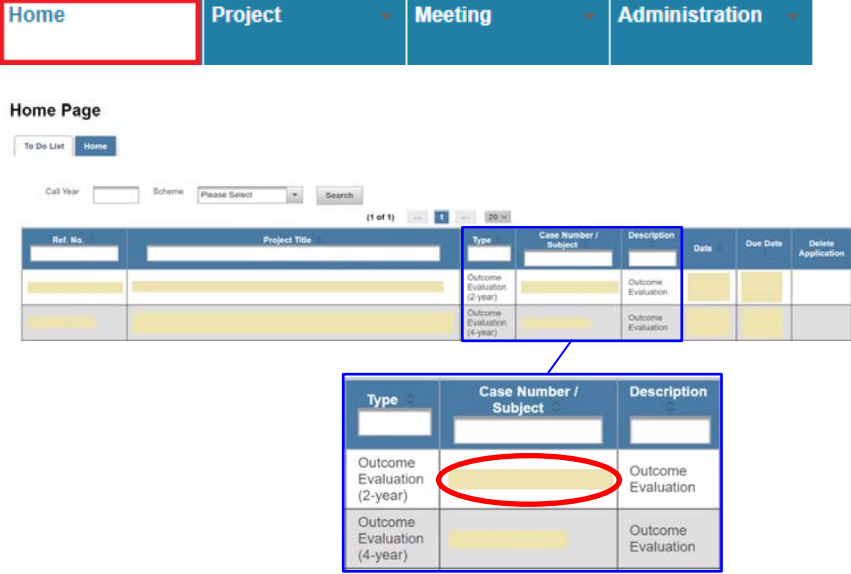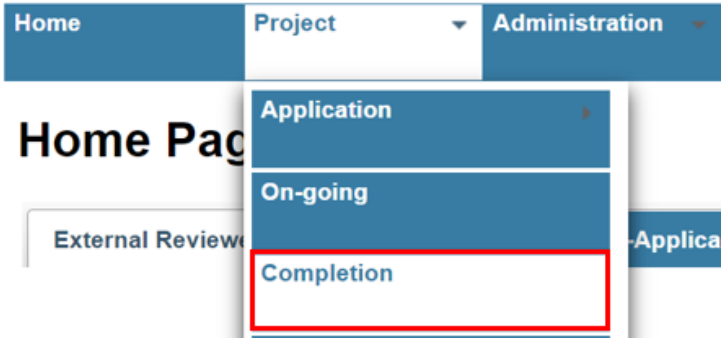
Step 4b:

- Click "View".

- View the uploaded file for the submission of FR and DR.

Submission of Outcome Evaluation Survey

(Function for Outcome Evaluation Survey will be activated by RFS in due course)

Sample of email notification sent to PA for complete the outcome evaluation survey Subject: eGMS : Attn: (The Name of Principal Applicant) - Outcome evaluation survey of project funded by the Health and Medical Research Fund(Ref No) (2 years / 4 years) after project end date Dear (The Name of Principal Applicant), **Outcome evaluation of projects funded by** **the Health and Medical Research (HMRF)** I am writing to invite you to complete the outcome evaluation survey of your project funded by the HMRF - • Reference No.: (Ref No) • Project Title: (Project Title) • Principal Applicant: (The Name of Principal Applicant) • Project Commencement Date: (Commencement Date) • Project End Date: (End Date) • Time point of this Outcome Evaluation Survey: (2 years / 4 years) From 2023 onwards, Principal Applicants are required to complete outcome evaluation surveys at **two time points, i.e. 2 years and 4 years after the project end date**. This arrangement will allow more time for outcomes and impacts derived from the research findings and health promotion projects to accrue, especially policy impacts and behaviour/practice changes. Principal Applicants are advised to maintain records of evidence of impacts/outputs generated from the funded grants. Please login to (eGMS URL) to complete the survey by (due date). Access path: Project > Completion > More > Outcome Evaluation Survey *Importance of your reply* 1. It is a **contractual requirement** that "*The Principal Applicant and the Institution shall provide to the Government such information relating to the Project as the Government may reasonably request for the purpose of auditing and evaluating the Projec*t." The Research Fund Secretariat **maintains the track records of grant applicants including completion of this survey for outcome evaluation**. 2. Starting from 2023, approval for **new funding will not be granted** if the Principal Applicant has not submitted outstanding/overdue report(s)/certified financial statement(s) and audited account(s)/**outcome evaluation surveys** for his/her other grants supported by the HMRF. 3. The purpose of this evaluation is to provide a quantitative and qualitative assessment of the outputs and deliverables of projects supported with public money. The information provided will be invaluable in helping the Health Bureau determine among other things to what extent the research findings have contributed or may contribute to informing **health policies and enhancing practice/changing behaviour, identifying knowledge gaps that may be worthy of further support**, and whether the supported research represents good value for money. Should you have technical issues in completing this online survey, please email to us *egmsenquiry@healthbureau.gov.hk.* Thank you very much.	***Step 1 :*** Email notification for complete the outcome evaluation survey will be received. - Please click on the eGMS URL to go to the eGMS login page.

	Step 2: Go to the eGMS Login page. Enter login email and password, and click '<mark>Login</mark>'.
	<u>Method A</u> ***Step 3:*** Go to Home Page > To Do List - Click the "<mark>Case Number / Subject</mark>" of the project under type: "<mark>Outcome Evaluation (2-year)/ (4-year)</mark>" [Go to ***Step 5***]
	Or <u>Method B</u> ***Step 3:*** Go to project > Completion
	Step 4: 4.1 Go to '<mark>Principal Applicant</mark>'. 4.2 Search '<mark>Reference No.</mark>'. 4.3 Click '<mark>More</mark>'.

or

Outcome Evaluation of HMRF Research Project - 2nd Survey'

4.4 Click 'Outcome Evaluation of HMRF Research Project - 1st Survey' or 'Outcome Evaluation of HMRF Research Project - 2nd Survey'.

Go to **Step 5**

Sample of Outcome Evaluation of HMRF Project:

Sample of Research Project:

Step 5:
- Fill in the outcome evaluation.

(Survey for the Area of Project: Public health, human health and health services research; Infectious diseases or Advanced medical research.)

B. CAPACITY BUILDING

B1. Has participation in the research led to **additional formal qualifications** for any member of the project team or other research staff / post-graduate students etc, or is it likely to do so?

○ Yes   ○ No   *If Yes, give details below; If No, go to B2*

I. Any member of the project team

Type of qualification awarded to project team member	Please specify if 'Other' is chosen	Name of person gaining/expected to gain* qualification		Contribution from the research project	Delete
		Gained	Expected*		
No records found.					

[Add]

II. Any project staff, post-graduate students, etc

Type of qualification awarded to research staff, postgraduate students, etc.	Please specify if 'Other' is chosen	Name of person gaining/expected to gain* qualification		Contribution from the research project	Delete
		Gained	Expected*		
No records found.					

[Add]

*include post-graduate degrees currently in progress

B2. Has participation in the research led to **career advancement** for any member of the project team?

○ Yes   ○ No   *If Yes, give details below; If No, go to B3*

Name of team members	Changes in post		Contribution from the research project	Delete
	From	To		
No records found.				

[Add]

B3. Have the research project findings or methodology or theoretical developments **generated subsequent research** by any member of the project team?

○ Yes   ○ No   *If Yes, give details below; If No, go to B4*

Funder	Amount ($)	The importance of the research project to securing later funding	Delete
No records found.			

[Add]

B4. Are you aware of any significant ways in which your research project has contributed to further **research conducted by others**?

○ Yes   ○ No   ○ Don't know   *If Yes, give details below; If No, go to B5*

Project team	Research project title/topic	The importance of your research project to further research by others	Delete
No records found.			

[Add]

B5. Did you **collaborate / enter into partnership** for the purpose of completing this project?

○ Yes   ○ No   *If Yes, give details below; If No, go to C1*

N.B. The list should tally with the authorship of the Final Report / Dissemination Report. If not, clarify under "Remarks".

During the conduct of this project the Principal Applicant (PA) collaborated / had a partnership with the following personnel from:*		
Personnel from…	Personnel name / Department / Institution	Remarks
…the PA's department		
…another department at the PA's institution		
…another institution in Hong Kong		
…an institution in Mainland China		
…an institution overseas (specify)		

* list all that apply

C. POLICY MAKING

C1. Have the findings from your research project been used in **policy / decision making** at any level of the health service?[1]

○ Yes   ○ No   ○ Don't know   *If Yes, give details below; If No, go to C5*

[1]Examples of the use of negative results from studies (despite adequate statistical power) should be included.

C2. Give details of the use including: the **levels** at which policies / decisions were influenced; and the **importance** or impact of the research project's findings to the adoption of the policy / decision.

Use the following letters to categorise the <u>level</u> influenced.
Geographical level
A = local (China - Hong Kong)   B = national (China - Mainland)   C = international
Organisational level in local / national / international context
D = Legislative Council   E = Health Bureau   F = Department of Health
G = Hospital Authority   H = Universities / schools (please specify)
I = Professional organisations (please specify)   J = Non-governmental organisations (NGOs) (please specify)
K = Others (please specify)

Policy / Decision Making	Geographical level	Organisational level	Degree of impact of research on policy/decision making	Delete
No records found.				

[Add]

C3. Give **a detailed narrative** explaining on how the research project findings led to or underpinned the health system policy or decision making listed in C2 , the beneficiaries, when the impact occurs/occurred, and evidence **evidence**[2] illustrating the extent of the impact.

[2]Evidence of policy relevance could take many forms including: citing / using research project findings in policy documents, treatment guidelines and protocols, being members of a committee issuing a policy document or a treatment guideline, inclusion of findings in a contract or in a document from an audit, an inspectorial or an evaluative body etc.

Policy / Decision Making	Detailed narrative explaining on how the research project findings led to or underpinned the health system policy or decision making, the beneficiaries, when the impact occurs/occurred, and evidence[2] illustrating the extent of the impact. (Indicative maximum 500 words)	Delete
No records found.		

[Add]

C4. Did the impacts listed in C3 result from research findings of more than one project? If so, provide details of the other projects, i.e. Name of funding agency, Title, Reference number, Principal Applicant, Approved amount, Start/End dates.

○ Yes   ○ No   *If yes, please specify*

Name of Funding Agency	Project Title	Reference Number	Principal Applicant	Approved Amount (HK$)	Project Start Date	Project End Date	Delete
No records found.							

[Add]

C5. Have you or your project team members participated in **health-related policy / advisory committees** as a direct outcome of this research?

○ Yes   ○ No   *If Yes, give details below; If No, go to D1*

Name of health-related policy / advisory committees	Post title	Contribution from the research project	Delete
No records found.			

[Add]

CHANGES IN PRACTICE

D1. Have the findings from your research project led to **changes**, either directly or through the application of research-informed policies, **in behaviour and / or practice?**[3]

○ Yes   ○ No   ○ Don't know   *If Yes, give details below; If No, go to E1*

[3]Examples of the use of negative results from studies (despite adequate statistical power) should be included.

D2. Specify the **research end users** whose behaviour and / or practice has changed, the **level** at which any change occurred, and how important the research project findings were in changing behaviour and/or practice.

Use the following letters to categorise the level and research end user in which behaviour and/or practice have changed.
Geographical level

A = local (China - Hong Kong)   B = national (China - Mainland)   C = international

Organisational level in local / national / international context

D = Legislative Council   E = Health Bureau   F = Department of Health

G = Hospital Authority   H = Universities / schools (please specify)

I = Professional organisations (please specify)   J = Non-governmental organisations (NGOs) (please specify)

K = Others (please specify)

Research end users

L = Medical / allied health professionals / other providers

M = Health care managers/administrators

N = Health service users / the wider public

Behaviour / Practice	Geographical level	Organisational level	Research end user	Degree of impact of research on behavioural changes	Delete
No records found.					

Add

D3. Give **a detailed narrative** explaining how the research project findings led to or underpinned the changes in behaviour and/or practice listed in D2, the beneficiaries, when the impact occurs/occurred, and **evidence** [4] illustrating the extent of the impact.

[4]Evidence of changes in behaviour and/or practice could take many forms including: treatment guidelines and protocols, standard operating procedures, surveys of end-users, etc.

Behaviour / Practice	Detailed narrative explaining on how the research project findings led to or underpinned the changes in behaviour and/or practice, the beneficiaries, when the impact occurs/occurred, and evidence[4] illustrating the extent of the impact. (Indicative maximum 500 words)	Delete
No records found.		

D4. Are the above impacts listed in D3 result from research findings of more than one project? If so, provide details of the other projects, i.e. Name of funding agency, Title, Reference number, Principal applicant, Approved amount, Start/End dates,.

○ Yes   ○ No   *If yes, please specify*

Name of Funding Agency	Project Title	Reference Number	Principal Applicant	Approved Amount (HK$)	Project Start Date	Project End Date	Delete
No records found.							

Add

E. KNOWLEDGE TRANSFER AND LONG-TERM IMPACT

E1. State whether any of the following **dissemination activities** have been based on or resulted directly or indirectly from the findings of this research project.

Dissemination activities	
Conferences / workshops primarily for academics (e.g. keynote, speech, invited speaker, oral or poster presentation)	○ Yes ○ No
Conferences / workshops primarily for practitioners / service users (e.g. keynote, speech, invited speaker, oral or poster presentation)	○ Yes ○ No
Media presentations (e.g. Press conferences / briefings; Interview / article (newspapers, magazines, TV, radio, etc)	○ Yes ○ No
Other (please specify)	○ Yes ○ No

Previous evaluations have suggested that *liaison between researchers and potential users of the research findings* before starting the project or while it was in progress was a factor in subsequent utilisation of the findings.

E2. Did you liaise with **potential users of the research findings…**

…before starting the project?   ○ Yes ○ No

If YES, with whom did you liaise?

…during the research project?   ○ Yes ○ No

If YES, with whom did you liaise?

E3. Was such liaison a factor in whether the research findings were subsequently utilised or not?

○ Yes ○ No

E4. What aspects of the liaison were most important in determining whether the research findings were used or not?

[text box]

E5. Were there **facilitators or barriers** that account for the research being utilised or not?

Facilitators: ○ Yes ○ No

If yes, please specify

[text box]

Barriers: ○ Yes ○ No

If yes, please specify

[text box]

END
Thank you for your help

(5.1) [Close] (5.2) [Temp Save] (5.3) [Preview] (5.4) [Submit to RFS]

Sample of Health Promotion Project:

Outcome Evaluation of HMRF Research Project - 1st Survey

Project Reference No.	[____]
Project Title	[____]
Start Date	[____] End Date [____] Approved Amount ($) [____]
Project Close Date	[____]
Administering Institution (AI)	[____]

A. Reach (individual level) - the absolute number or proportion, and representativeness of individuals who were willing to participate in your project.

A1. What were the characteristics of the proposed target participants (e.g. clients/carers/staff)?

[text box]

A2. The proposed number of participants: [____]

The actual number of participants: [____]

A3. How did the actual participants differ (e.g. number, characteristics) from the target participants? Please select one below.

○ Completely Different
○ Mostly Different
○ Moderately Different
○ Somewhat Different
○ No Difference

B. Efficacy or Effectiveness (Individual Level) - the impact of an intervention on key outcomes, including quality of life, and economic outcomes potential, unexpected negative effects, etc.

B1. Did you try to evaluate the outcomes of your project?

○ No   ○ Yes (Give details below)

B2. What is the impact of your project? Please give details below.

Key Outcomes	Description	Documented Evidence e.g. Effect Size (%)
(i) Knowledge gained		
(ii) Behaviours changed		
(iii) Health status improved		
(iv) Others or any negative effects:		

(Survey for the Area of Project: Health Promotion.)

C. Adoption (setting and organizational level) - the absolute number, proportion and representativeness of settings and intervention agents (people who delivered your project) who were willing to initiate the programme.

C1. To your best knowledge, how many organizations have adopted your project or components of your project?

Provide the names of groups, NGOs and government services adopting your project, if any.

C2. Did any partnership(s) form in your project?

○ No   ○ Yes (Give details below)

C3. Has the project, its services or results been disseminated?

○ No   ○ Yes (Give details below)

D. Implementation (setting and organizational level) - How closely the actual implementation met the planned criteria to assure maximum reach and effectiveness?

D1. How closely the actual implementation met the planned criteria? Please select one below.

○ No Criteria Met
○ Somewhat Met
○ Moderately Met
○ Mostly Met
○ All Met

D2. Were there any barriers (internal and external) identified for the implementation of your project strategies?

○ No   ○ Yes (Give details below)

D3. What solutions did your project develop in response to problems/challenge, if any? e.g. availability, accessibility and affordability of health promotion material, etc.

E. Maintenance (individual or setting level) - the extent to which a programme or policy becomes institutionalised or part of the routine organizational practices and policies.

E1. Has your project been incorporated in the core business of the agencies/organizations?

○ No   ○ Yes (Give details below)

E2. Did new structures and processess emerge to enable the ongoin health promotion interventions?

○ No   ○ Yes (Give details below)

E3. Have funding or supports been sought or secured from other sources to continue or extend your project?

○ No   ○ Yes (Give details below)

End of Questionnaire - Thank you!

(5.1) Close   (5.2) Temp Save   (5.3) Preview   (5.4) Submit to RFS

End of Questionnaire - Thank you!

(5.1)
Close   Temp Save   Preview   Submit to RFS

Step 5.1 (On a need basis)

- Click 'Close' to close the browser.

End of Questionnaire - Thank you!

(5.2)
Close   Temp Save   Preview   Submit to RFS

ⓘ The Outcome Evaluation Survey of application :   , is saved.

Close

Step 5.2 (On a need basis)

- Click 'Temp Save' to save.
  An acknowledgment message for temp saved will be shown at the top.
- Click 'Close' to close the pop-up window.

End of Questionnaire - Thank you!	***Step 5.3 (On a need basis)***
(5.3)	- Click '<mark>Preview</mark>' to preview the completed Survey.
Close　Temp Save　(Preview)　Submit to RFS	
D. Implementation (setting and organizational level) - How closely the actual implementation met the planned criteria to assure maximum reach and effectiveness?	
D1. How closely the actual implementation met the planned criteria? Please select one below.	
No Criteria Met	
Somewhat Met	
Moderately Met	
Mostly Met	
All Met	
D2. Were there any barriers (internal and external) identified for the implementation of your project strategies?	
No　Yes (Give details below)	
D3. What solutions did your project develop in response to problems/challenge, if any? e.g. availability, accessibility and affordability of health promotion material, etc.	
E. Maintenance (individual or setting level) - the extent to which a programme or policy becomes institutionalised or part of the routine organizational practices and policies.	- Click '<mark>Close</mark>' to close the preview page;
E1. Has your project been incorporated in the core business of the agencies/organizations?	- Click '<mark>Back</mark>' to return to previous step;
No　Yes (Give details below)	- Click '<mark>Submit to RFS</mark>' to submit the survey, and '<mark>Yes</mark>' to confirm the submission of survey to RFS.
E2. Did new structures and processess emerge to enable the ongoin health promotion interventions?	
No　Yes (Give details below)	
E3. Have funding or supports been sought or secured from other sources to continue or extend your project?	
No　Yes (Give details below)	
End of Questionnaire - Thank you!	
Close　Back　Submit to RFS　｜Close　Back　Submit to RFS｜	
Confirm	Acknowledgment message for 'Outcome Evaluation has been submitted' will be shown at the top.
⚠ Are you sure to submit the outcome evaluation survey?	
Yes　No	
ℹ The Outcome Evaluation Survey for project _____ has been submitted.	- Click '<mark>Close</mark>' to close the pop-up window.
Close	
End of Questionnaire - Thank you!	***Step 5.4:***
(5.4)	- Click '<mark>Submit to RFS</mark>' to submit the survey, and '<mark>Yes</mark>' to confirm the submission of survey to RFS.
Close　Temp Save　Preview　(Submit to RFS)	
Confirm	
⚠ Are you sure to submit the outcome evaluation survey?	Acknowledgment message for 'Outcome Evaluation has been submitted' will be shown at the top.
Yes　No	
ℹ The Outcome Evaluation Survey for project _____ has been submitted.	- Click '<mark>Close</mark>' to close the pop-up window.
Close	

	Step 6:
Sample of Research Project: Acknowledge Email to Principal Applicant: for submission of Outcome evaluation survey Subject: [Acknowledgement] eGMS: Receipt of Outcome evaluation survey of project funded by the Health and Medical Research Fund (Ref No) Dear (The Name of Principal Applicant), This is to acknowledge receipt of the Outcome evaluation survey for the following project submitted via the electronic Grant Management System (eGMS): • Reference No.: (Ref No) • Project Title: (Project Title) • Principal Applicant: (The Name of Principal Applicant) • Project Commencement Date: (Commencement Date) • Project End date: (End Date) • Time point of this Outcome evaluation survey: (2 years / 4 years) Thank you very much.	You will receive an email notification if you have submitted the Outcome evaluation survey.