

Electronic Project Management System

**Submit applications for
the Quality Education Fund
at your fingertips**



*Applications for the Quality
Education Fund
can be submitted throughout the
year via EPMS*



The Electronic Project Management System (EPMS) is a one-stop, user-friendly platform for applicants and grantees to submit applications for Quality Education Fund (QEF) and reports of approved projects via the Internet. Starting from September 2006, QEF applications can only be submitted via EPMS. Submission by other means e.g. by post, by fax, by email or in person will not be accepted.

Workflow for Submission of QEF Applications via EPMS

Pre-requisites

(Read the “Guide to Applicants” on the QEF website)

(1) Logon EPMS (<http://qef.org.hk>)

(2) Update User information (if required)

(3) Submit new application

(4) Attach project summary and proposal

(5) Enter collaborating/participating organisation's information (if applicable)



(6) Confirm and submit application
(Print record, if required)

(7) Receive acknowledgment from QEF

P**Pre-requisites - Before submitting your application, you should:**

- ▶ Create a user account/register as a user or use the logon information provided by the QEF Secretariat to check your Grantee/Applicant ID and password.
- ▶ Read the “Guide to Applicants” on the QEF website (<http://qef.org.hk>), and have all documents, including the project proposal, project summary and all other attachments, ready for upload.

**1****Logon EPMS**

- 1.1) Enter the QEF website, <http://qef.org.hk> with Internet Explorer 7.0 or above and press  to enter.
- 1.2) Enter Applicant ID and password.
- 1.3) Press  to enter.
- 1.4) If you have forgotten your password, press “Request password via e-mail” and EPMS will send the password to your registered e-mail account. You can also download the ID/password request form, complete and return it to the QEF Secretariat.

2**Update Applicant’s information (if required)**

- 2.1) Press the tab “**Update Grantee/Applicant Information**” on the top menu bar.
- 2.2) Update information as required, such as the name of the head of organisation/school, your active e-mail address etc.

2.1 Update Grantee/Applicant Information

2.2 Email Address

3 Submit new application

- 3.1) Select “**Submit New Application**” on the menu bar.
- 3.2) Select one project theme.
(Note: If your application involves more than one theme, choose the one that best describes the major focus of your proposed project.)

3.1 Submit New Application

3.2 Project Theme

3.3 Next Page

3.4 Project Theme

- 3.3) Press **Next Page** to continue.
- 3.4) All fields marked with are mandatory.

3.5 Project Particulars

3.6a Save

3.6b Previous Page

3.7 Next Page

3.5) Type in all the required information. Validation error(s) will be listed to prompt the user to fill in all the mandatory fields.

(Note: If you wish to submit a collaborative 'Joyful@School' mini application, please select '38 - Collaborative "Joyful@School" Application' for the field 'Project Sub-category'.)

3.6) You can save the information entered for future use or press **Previous Page** to return to the pages saved.

3.7) After filling in all the required information, press **Next Page** to continue.

4

Attach project summary and proposal

4.1) You can download the Guide to Applicants, Explanatory Notes for Completing the QEF Application Form and the Project Summary Template in the "Download Guidelines" area.

4.2) Press **Upload** to upload the one-page project summary which should be in **pdf** format.

Application Form

Part B Project Summary

1 - Writing the Project Summary

Please use the format at Annex in the Explanatory Notes to provide in one A4 size page at font size no smaller than 11 a summary of the project.

(For details, please refer to paragraph 3 of the Explanatory Notes.)

Download Project Summary Template (Annex.)

Please read the "Explanatory Notes for completing the Quality Application Form" before completing this form.

Download Explanatory Notes

2 - Upload Project Summary

The file submitted should be saved in .pdf format and the file size is limited to 1.0 Mbyte. The latest uploaded file will be considered as the final version.

Upload Project Summary

Upload History of Project Summary

Filename	Size (Mbyte)	Date Uploaded	Mark for Delete
No Record.			

Mark for Delete

Delete

Previous Page **Next Page** **Exit**

Upload - Project Summary

Upload Attachment

Please select file to upload

File: **Browse...**

Upload

Filename	Size(M)	Upload Date
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Save

- 4.3) Press **Browse** , **Upload** and **Save** to upload and save the selected file in the system.
- 4.4) You will receive a message “**Save Successfully**” when the upload process is completed.
- 4.5) You can mark and press **Delete** to delete an uploaded file in case you have saved a wrong file.
- 4.6) Press **Next Page** to continue.
- 4.7) Repeat steps 4.2 to 4.6 to upload the project proposal.
- 4.8) For applications with grant sought not exceeding \$200,000, you can download the proposal template from the EPMS. Press **Upload** to upload the completed six-page project proposal. The documents to be uploaded should be in pdf format.

5 Enter collaborating/participating parties’ information

(skip this step if not applicable)

- 5.1) You can either enter a school number or a partial name of the school/organisation, then press **Search** to acquire the school/organisation’s information from the EPMS database.
- 5.2) Press the arrow to expand the drop down list, then select the collaborating/participating school/organisation from the search results.

Application Form

Part D Details of Collaborating / Participating Organizations

Please provide a list of schools and organizations which has / have agreed to collaborate / participate in the proposed project. The nominated schools and organizations should be requested to confirm their collaboration / participation through the EPMS within 14 days from the date of submission of the application. Should no confirmation be made, the schools and organizations concerned will not be counted as valid collaborators / participants.

You can enter a school number or partial name of school/organization to search for collaborator registered under EPMS:

5.1a School Numbers:

5.1b Name of Collaborating / Participating Parties:

5.1c **Search**

Select Collaborating/Participating School/Organization:

5.2

5.3 **Add**

The following organization(s) has/have confirmed their participation in the proposed project:

Name of Organization(s)	Name of Supervisor/Head	School No.	Session	Status	Mark for Delete
No Record.					

5.4 **Delete**

- 5.3) Press **Add** to append the organisation selected to the invitation list.

(Note: If you wish to submit a collaborative 'Joyful@School' mini application, please press 'Add As Collaborator' or 'Add As Beneficiary School' to append the collaborator / beneficiary school selected to the invitation list.)

- 5.4) To delete an organisation from the list, select the organisation and press **Delete**.
- 5.5) Repeat steps 5.1 to 5.3 until your list is completed.

Confirmation Procedures for Invited Collaborators

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An e-mail message will be sent to the invited collaborators reminding them to confirm their collaboration via EPMS. They can logon the EPMS with their own account and:

- (i) Press “**Confirm Collaboration**” on the top menu bar.
- (ii) Click a project to view the project summary.
- (iii) Press download to view/save the Project Summary for reference before confirming. For details of the project, please contact the applicant.
- (iv) Click the checkbox to confirm collaboration/participation in the project submitted by the applicant. Press **Submit** to confirm collaboration.

The screenshot shows the EPMS interface for confirming collaboration. The top menu bar includes options: Home, Submit New Application, Update/Review Application, Update Grantee/Applicant Information, Submit Reports/Deliverables, **Confirm Collaboration** (highlighted with a red box and a yellow arrow labeled A(i)), and Contact Project Officer. Below the menu is a table titled "Confirm Invitation of Collaboration" with columns: Project No., Project Title, Name in English, Name in Chinese, Grant Sought (HK\$), Project Period, Status, and Confirmed Date. A red box highlights a row in the table, with a red arrow pointing to a detailed view of that project. The detailed view shows "Invitation of Collaboration Details" for Project No. 2006/0027, Project Title, Grant Sought: 3000000, Name in English, Name in Chinese, Project Period: 09/2006 - 08/2007, and Project Summary: Project Summary. A red box highlights the "Download" button. Below the details is a "Declaration" section with a checkbox and the text "I confirm that I/my organization will collaborate/participate in the project submitted by the Applicant." A red box highlights the checkbox, with a red arrow pointing to it from the text "Click the checkbox to confirm collaboration/participation in the project submitted by the applicant." Another red box highlights the "Submit" button, with a red arrow pointing to it from the text "Press Submit to confirm collaboration." The interface also includes "Previous Page", "Submit", and "Exit" buttons at the bottom.

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Confirm and Submit Proposal

- 6.1) Read the clauses under the part on declaration carefully.
- 6.2) Click the “Confirmed” checkboxes to indicate your agreement to the relevant clauses.
- 6.3) Press **Submit** to save and complete the submission process.

The screenshot shows a web form titled "Application Form" with a section "Part E Declaration". There are three rows of text, each followed by a "Confirmed" checkbox. A red dashed box highlights the checkboxes, with a red octagon labeled "6.2" next to it. Below the text, there are three buttons: "Previous Page", "Submit", and "Exit". The "Submit" button is highlighted with a red box and a red octagon labeled "6.3".

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Receive acknowledgement from QEF

- 7.1) A summary of the submitted information will be displayed after the **Submit** button is pressed. Press **Print** to print a record of your application.
- 7.2) An e-mail message will be sent to your registered e-mail account to acknowledge the receipt of your application.

Useful Information

- (1) QEF Hotline: **2921 8833**
- (2) QEF website: <http://qef.org.hk>

