# Electronic Grant Management System (eGMS)

# **Training Manual for Co-Applicants (CoAs)**

## **Application Module**

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

TM(App)\_CoA (Updated: Dec 2022) Version 3.2

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#### **Abbreviations**

CoA = Co-Applicant AI = Administering Institution eGMS = Electronic Grant Management System EO = Executive Officer DH = Department Head\* FA = Fellowship Applicant FO = Finance Officer\* PA = Principal Applicant RFS = Research Fund Secretariat RO = Research Officer\*

\*AI users

## 1. Registration for eGMS account (for new user only)

Step 1: Go to eGMS login page: <a href="https://fis.healthbureau.go">https://fis.healthbureau.go</a> ov.hk /eGMS/xhtml- public/login.xhtml Click *Register for Go Approximation of the formation of the format	<ul> <li>Co to eGMS login page: https://fis.login.page: https://fis.login.</li></ul>				
<ul> <li>But products and the field in the interview of the CoAsecust interview of the CoAsecust interview of the coase and the</li></ul>	<ul> <li>Charle &amp; Extend Returns to the end of end of the function between the function betwe</li></ul>	Email: Your login Password: Login More Info : Frequently Asked Que: You should not rec 1. you are an 3. you are an 3. you are an 4. you are an 4. you are an	email is your email address.       Register for Principal Applicant Account         email is your email address.       Register for Co-Applicant Account         Earout your loansword?       GMS account has already been registered for GRB Members/ External Reviewers. Please contact the Research Fund Secretariat (Email: gymsenoutry@haithbureau.gov.hk) if you have any questions.         tions         gister for an eGMS account if         Crant Review Board Member (your login email is your email address.); or Principal Applicant (PA) and submitted application via eGMS before; or bo-Applicant (CoA) and signed an application via eGMS before; or in eGMS account already.	Stej -	Go to eGMS login page: https://rfs.healthbureau.g ov.hk /eGMS/xhtml- public/login.xhtml Click 'Register for Co- Applicant Account Registration'. After read the message on the pop-up browser,
Room / Floor       Image: Control of the affiliation is NOT in Hong Kong or who is not able to find the affiliation from Al's pull down menu.       domain / sub-domain list.         Building       Image: Control of the affiliation from Al's pull down menu.       domain / sub-domain list.         Street       Please enter number and name of street.       If the AI is not in pull-down menu, please select         Country / Region       Please Select       Image: Contact No.         Fax       Image: Contact No.       Image: Contact No.         Fax       Image: Contact No.       Image: Contact No.         Gender*       Image: Contact No.       Image: Contact No.         Gender*       Image: Contact No.       Image: Contact No.         Walle       Female       Image: Contact No.       Image: Contact No.         Visual       ORCID ID*       Image: Contact No.       Image: Contact No.         Walle       Female       Image: Contact No.       Image: Contact No.         Walle       Female       Image: Contact No.       Image: Contact No.         Gender*       Male       Female       Image: Contact No.       Image: Contact No.         Walle       Visual       Audio       Image: Contact No.       Image: Contact No.         Walle       Visual       Audio       Image: Contact No. <t< th=""><th>Room / Floor   Building   Street   Please enter number and name of street.   Cuty / Area   Contact No.   Fax   Occitat No.   Fax   OR CID ID*   9999&lt;9999&lt;9999&lt;9999 </th><th>"If you are an External Revit To register account, please ('Optional field for registration Email Title Last Name First Name Location of Administering Institution Current Post Unit / Department</th><th>www. you are not requiser for the CoA account.  complete the information below.  Please provide institutional email account  Please Select  Please Select Please Select  Please Select  Please Select Please Select Please Select Plea</th><th>- No</th><th>Complete <b>all</b> fields except ORCID ID and gender which are optional. Click <mark>'Submit'.</mark> tes: The email must be</th></t<>	Room / Floor   Building   Street   Please enter number and name of street.   Cuty / Area   Contact No.   Fax   Occitat No.   Fax   OR CID ID*   9999<9999<9999<9999	"If you are an External Revit To register account, please ('Optional field for registration Email Title Last Name First Name Location of Administering Institution Current Post Unit / Department	www. you are not requiser for the CoA account.  complete the information below.  Please provide institutional email account  Please Select  Please Select Please Select  Please Select  Please Select Please Select Please Select Plea	- No	Complete <b>all</b> fields except ORCID ID and gender which are optional. Click <mark>'Submit'.</mark> tes: The email must be
Submit Cancel		Room / Floor Building Street City / Area Country / Region Contact No. Fax ORCID ID* Gender*	Please enter number and name of street.       Please Select       9999       - 9999       - 9999       - 9999       - 9999       - 9999       - 9999       - 9999       - 9999       - 9099	(2)	domain / sub-domain list. If the AI is not in pull- down menu, please send email to <u>egmsenquiry@healthbu</u>

Subject: eGMS - Account Registration for Co-Applicant: (Title) (Last Name) (First Name) (The Name of User)         Body:         Dear (Title) (Last Name) (First Name) (The Name of User),         Please find the temporary password for accessing the electronic Grant Management System (eGMS):	<i>Step 3:</i> A notification email for the Account Registration for Co- A will be sent to the email addressed provide in Step 2.
Password: (Insert temporary password) Login page: (eGMS URL)	
Please be reminded to set up a new password after logging in to the <u>eGMS</u> (eGMS URL). Thank you.	<ul> <li>Click the 'eGMS URL' to 'login' with the given Password.</li> </ul>
Login to eGMS         Email:         Your login email is your email address.         Password:         End to the company of t	Enter 'New password' and 'Re-type New Password'. Then click ' <mark>Save</mark> '.
Current Password  New Password  Password  Password  Re-type New Password  Save	Note: The format of password: at least 10 characters containing at least one digit 0-9 or special character and one alphabet, e.g. abcde12345.

Subject: eGMS –(temporary reference number): Submission of Grant Application	<u>Step 1a:</u>
from (Title) (Last Name) (First Name) (The Name of Principal Applicant/Fellowship Applicant)	- Click the eGMS
Email to CoAs for signing a grant application (CoA has eGMS account):	URL to login to
Dear Sir/Madam,	e
This email is sent to inform you that a grant application has been submitted in the electronic Grant Management System (eGMS) of the Research Fund Secretariat, Health Bureau, HKSAR. Details are as follows:	the eGMS.
<ul> <li>Temporary Reference Number: (temporary reference number)</li> <li>Principal Applicant/Fellowship Applicant: (The Name of Principal Applicant/Fellowship Applicant)</li> <li>Title: (Project Title)</li> </ul>	
As you are the Co-Applicant of this application, your signature for this application is required.	
Please login to the <u>eGMS</u> (eGMS URL) to access the application for necessary action(s).	
If you have any questions, please contact the Principal Applicant/Fellowship Applicant.	
Thank you.	Or
Email to CoAs for signing a grant application (CoA does not have eGMS	07
account):	<u>Step 1b:</u>
Dear Sir/Madam,	- Click the eGMS URL
This email is sent to inform you that a grant application has been submitted in the electronic Grant Management System (eGMS) of the Research Fund Secretariat, Health Bureau, HKSAR. Details are as follows:	to the eGMS login page and register for the Co-Applicant account.
<ul> <li>Temporary Reference Number: (temporary reference number)</li> <li>Principal Applicant/Fellowship Applicant: (The Name of Principal Applicant/Fellowship Applicant)</li> <li>Title: (Project Title)</li> </ul>	
As you are the Co-Applicant of this application, your signature for this application is required.	
application is required. Please create a Co-Applicant account on the <u>eGMS</u> (eGMS URL) and then	
<ul> <li>application is required.</li> <li>Please create a Co-Applicant account on the <u>eGMS</u> (eGMS URL) and then login to access the application for necessary action(s).</li> <li>If you have any questions on creating the Co-Applicant account, please contact the the Research Fund Secretariat at <u>egmsenquiry@healthbureau.gov.hk</u>. For issues relating to the application,</li> </ul>	

### 2. Invitation Email from PA/ FA on Endorsement of Grant Application

### 3. Endorsement of Grant Application

					Step 1:
Login to eGMS Email: Your login email is your email address. Password: Cogin Eorool your password? Forgot your login? Cogin with iAM Smart More Info >		Account Registration (FOR <u>APPLICANTS</u> ONLY!) Register for Principal Applicant Account Register for Co-Applicant Account Notes to Grant Review Board (GRB) Members/ External Reviewers eGMS account has already been registered for GRB Members and External Reviewers. Please contact the Research Fund Secretariat (Email: egmsenguiry@healthbureau.gov.hk) If you have any questions.		<ul> <li>Go to the eGMS Login page.</li> <li>Enter login email.</li> <li>Enter password and click 'Login'.</li> </ul>	
Frequently Asked Questions				UAT_v6.133.1	
For security reasons, with effect from with Transport-Level-Security (TLS) p	rotocol version 1.2. For details, plea	se click <u>here</u> .			G( )
Home Pag	Project -	Administrat	ion System Hel	lp	Step 2: Go to Project > Application > View Application
Scheme Pease Select Project Year Ret. No. Type (i) (Ret. No.) (ii) (iii) (Ret. No.) (iii) (iii)		Applicant	Department (HKS)	Actions Endorse Reject Endorse Reject	<ul> <li>Select 'Action List'</li> <li>Click on the 'Ref. No.' to view the Web-based Online e-Form; <i>or</i></li> <li>Click on the pdf to view the proposal in offline mode and pdf format'.</li> </ul>
Application Master List	Action List Please Select Please Select	•	Search		Note: (i) User may search for the application by select the Scheme and click 'Search'.
Project Year	HMRF HMRF (Fellowshi HCPF Others	p) ype			
Password:	a password (6 cha Cancel	racters) for o	downloaded PDF:		(ii) User should set a 6-character password to protect the downloaded report(s) for security reason.

Application Mester Lett Action Lett Scheme Prease Solect Starch (1 of 1) 1 200 Project Year Ret. No. Yope Project Time Projectant Organization (10) Actions Reject (Ret. No. ) 2 2 2 1 2 1 2 2 1 2 2 1 2	<ul> <li>Step 3a: To endorse.</li> <li>Click on 'Endorse' and 'Yes' for confirmation to endorse the application.</li> </ul>
Are you sure to endorse the application with Ref. No.          Yes       No         Image: Application [image: second successfully]	- An acknowledgment message for the endorsement will be shown at the top.
Confirm  A Are you sure to reject the application with Ref. No.  Yes No	<i>Or</i> <i>Step 3b:</i> <i>To reject.</i> - Click on 'Reject' and 'Yes' for confirmation to reject the application.
Application[ ] is rejected successfully	- An acknowledgment message for the rejection will be shown at the top.
Master List     Action List       Ref No.     Project Tille       Project Tille     Principal Applicant       Clions     Clions       Master List     Action List         (1 of 1)     Image: Clinic	Step 4: (for information only) The record on the 'Action List' will be moved to 'Master List'.