

**User Manual**

**for**

**Electronic Distribution of Grant/Subsidized Schools**

**Provident Fund Statements (e-PFS)**

**for**

**School Users**

**Distribution List** : Users in Schools and Funds Section / Finance Division, EDB

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Education Bureau

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# 1. Operational Procedures

## 1.1 Logon

School Users can logon to e-PFS by using the EDB Common Log-On System (CLO). For School Users who have privileges to access e-PFS, such as Master School Administrator (MSA), School Head, School Supervisor and the delegated officer, they can click the button to e-PFS at the tab “School-based System” in CLO to logon to e-PFS.

### 1.1.1 Logon to CLO

 教育局  
Education Bureau

### Common Log-On System 統一登入系統 (CLO)

Username/用戶名稱

Password/密碼

[Logon / 登入](#) [FAQs/常見問題](#)

[Forgot Username/Password](#)  
[忘記用戶名稱/密碼](#)

 智方便登入  
Login with iAM Smart [More Info / 了解更多](#)

[Self Register/自助註冊](#)

Click [here](#) to register a new e-Services Portal School Account/  
[按此註冊新的電子化服務入門網站學校戶口](#)

EDB application systems contain sensitive personal information which should be handled with care. Suggested preventive measures are as follows:

- Avoid logging on system using public/shared computers or through unsecured networks.
- After logging on, do not leave the computer unattended without proper security measures.
- **Log out after used and close all browsers immediately so that others cannot gain unauthorized access.**

教育局應用系統存有敏感的個人資料，必須小心處理。建議預防措施如下：

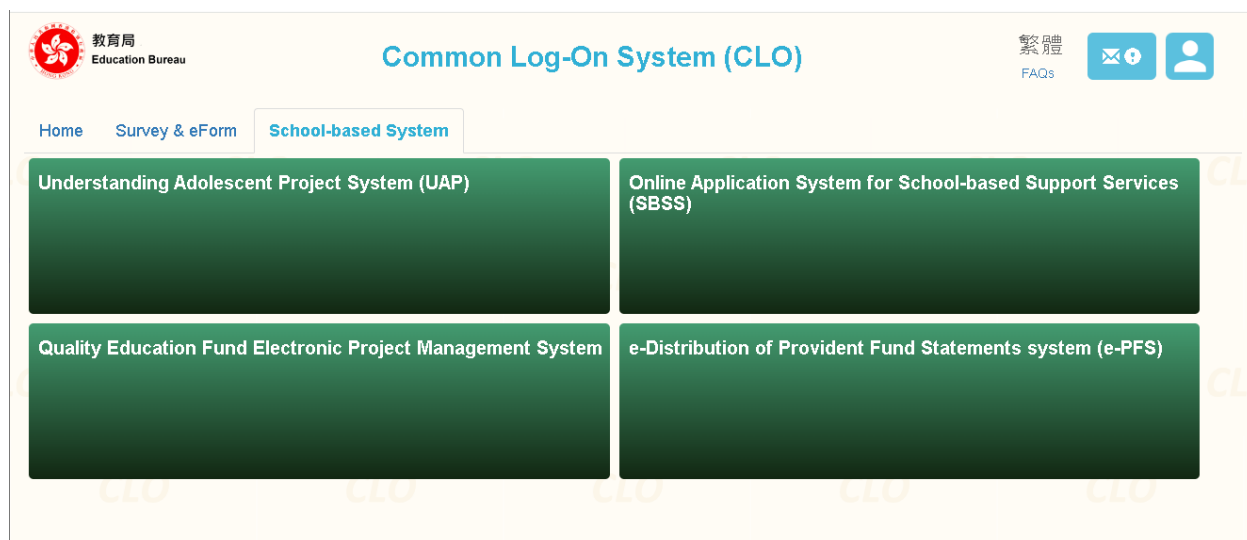
- 請勿使用公共 / 共用電腦或透過不可靠的網絡登入。
- 登入後，請勿在沒有合適保安措施下離開你的電腦。
- 使用後立即登出並關閉所有瀏覽器，以防止其他人士非法登入。

 Schools may click [here](#) for details of using CLO, including logging on, delegating school user to be school representative and registering a CLO User account, etc.  
學校可[按此](#)瀏覽有關「統一登入系統」的操作說明，包括戶口登入、委任學校代表和自行登記戶口等。

Steps:

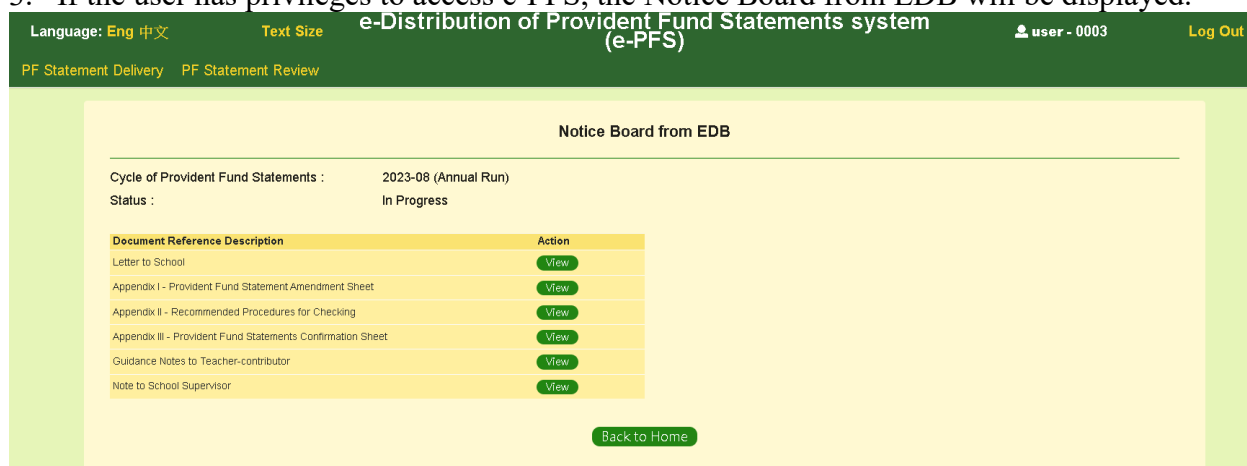
1. Input Username and Password
2. Click “Logon” button.

### 1.1.2 Access e-PFS via CLO



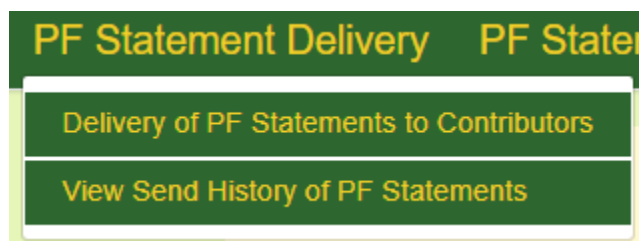
Steps:

1. Click “School-based System” button.
2. Click “e-Distribution of Provident Fund Statements system (e-PFS)” button.
3. If the user has privileges to access e-PFS, the Notice Board from EDB will be displayed.



## 1.2 Delivery of PF Statements to Contributors

This function allows School Users to deliver PF Statements to Contributors when the PF Statements are ready and EDB has sent a message through School Messaging Module (SMM) notifying schools to take necessary action. After the PF Statements have been delivered to Contributors, Contributors can access e-PFS via e-Services Portal to download the PF Statements.



Steps:

1. Move the mouse cursor over the tab “PF Statement Delivery”.
2. Click “Delivery of PF Statements to Contributors” button.

A screenshot of a web application form titled "Delivery of PF Statements to Contributors". The form is set against a light yellow background. It contains the following fields: "Cycle of Provident Fund Statements :" with a value of "2023-08 (Annual Run)", "Status :" with a dropdown menu showing "All", "Contributor's Staff Reference Number (SRN) :" with an empty text input field, and "Contributor's Name :" with an empty text input field. There is a green "Search" button below the input fields. At the bottom of the form, there is a green "Back to Home" button.

### 1.2.1 Search contributors

School Users can click the “Search” button to list out contributor(s) that match the specified searching criteria.

Steps:

1. For listing out all contributors in the current cycle of Provident Fund Statements, select “All” for “Status” and leave both “Contributor’s Staff Reference Number” and “Contributor’s Name” blank. For searching specific contributor(s), select appropriate “Status” and input “Contributor’s Staff Reference Number” or “Contributor’s Name”.

Delivery of PF Statements to Contributors

Cycle of Provident Fund Statements :

2025-08 (Annual Run)

Status :

All

Contributor's Staff Reference Number (SRN) :

1234567

Contributor's Name :

Search

2. Click “Search” button.

Delivery of PF Statements to Contributors

Cycle of Provident Fund Statements :

2025-08 (Annual Run)

Status :

All

Contributor's Staff Reference Number (SRN) :

1234567

Contributor's Name :

Search

Show 25 entries

Filter :

Showing 1 to 2 of 2 entries

Previous 1 Next

	Name of Contributor	SRN	Status	Email Address From e-Services	Last email send date	Acknowledged (Y/N)	Date of Acknowledgement	Action
<input type="checkbox"/>	CHAN XXX XXX	12345679	New	chanxxxxx@gmail.com		N		
<input type="checkbox"/>	WONG XXX XXX	12345678	New	wongxxxxx@outlook.com		N		

Showing 1 to 2 of 2 entries

Send Notification Export To Excel

Previous 1 Next

Back to Home

### 1.2.2 Send notification to contributors

From the contributors list in paragraph 1.2.1, School Users can send notification to contributors for the delivery of PF Statement. School Users may wish to remind contributors to maintain valid and up-to-date default email addresses on the e-Services Portal in advance.

Showing 1 to 2 of 2 entries

<input type="checkbox"/>	Name of Contributor	SRN	Status	Email Address From e-Services	Last email send date	Acknowledged (Y/N)	Date of Acknowledgement	Action
<input type="checkbox"/>	CHAN XXX.XXX	12345679	New	chanxxxxx@gmail.com		N		
<input type="checkbox"/>	WONG XXX.XXX	12345678	New	wongxxxxx@outlook.com		N		

Showing 1 to 2 of 2 entries

[Send Notification](#) [Export To Excel](#)

Steps:

1. Check the box next to the “Name of Contributor” to select contributor(s) .
2. Click “Send Notification” button.
3. Click “Yes” to confirm the action.

Confirm Dialog

Are you sure to send the notification?

[YES](#) [NO](#)

4. The “Status” of the Contributor will change to “Pending Delivery” and the notification email will be sent to the selected contributor(s) by the system scheduled at late evening.

Notification to contributors have been successfully scheduled to be sent

#### Delivery of PF Statements to Contributors

Cycle of Provident Fund Statements : 2025-08 (Annual Run)

Status : [All](#)

Contributor's Staff Reference Number (SRN) : 1234567

Contributor's Name :

[Search](#)

Showing 1 to 2 of 2 entries

<input type="checkbox"/>	Name of Contributor	SRN	Status	Email Address From e-Services	Last email send date	Acknowledged (Y/N)	Date of Acknowledgement	Action
<input checked="" type="checkbox"/>	CHAN XXX.XXX	12345679	Pending Delivery	chanxxxxx@gmail.com		N		
<input type="checkbox"/>	WONG XXX.XXX	12345678	New	wongxxxxx@outlook.com		N		

Showing 1 to 2 of 2 entries

[Send Notification](#) [Export To Excel](#)

5. The “Status” will change to “Delivered” after the notification email has been sent to the contributor(s).

Show 25 entries

Filter :

Showing 1 to 2 of 2 entries

Previous 1 Next

<input type="checkbox"/>	Name of Contributor	SRN	Status	Email Address From e-Services	Last email send date	Acknowledged (Y/N)	Date of Acknowledgement	Action
<input type="checkbox"/>	CHAN XXX.XXX	12345679	Delivered	chanxxxxx@gmail.com	31/01/2024	N		
<input type="checkbox"/>	WONG XXX.XXX	12345678	New	wongxxxxx@outlook.com		N		

Showing 1 to 2 of 2 entries

Send Notification Export To Excel

Previous 1 Next

6. If a contributor has downloaded the PF Statement through e-PFS, the Status will changed from “Delivered” to “Acknowledged”, the “Acknowledged” field of the contributor will change from “N” to “Y” and the “Date of Acknowledgement” will be recorded.

Show 25 entries

Filter :

Showing 1 to 2 of 2 entries

Previous 1 Next

<input type="checkbox"/>	Name of Contributor	SRN	Status	Email Address From e-Services	Last email send date	Acknowledged (Y/N)	Date of Acknowledgement	Action
<input type="checkbox"/>	CHAN XXX.XXX	12345679	Acknowledged	chanxxxxx@gmail.com	31/01/2024	Y	31/01/2024 12:47	
<input type="checkbox"/>	WONG XXX.XXX	12345678	New	wongxxxxx@outlook.com		N		

Showing 1 to 2 of 2 entries

Send Notification Export To Excel

Previous 1 Next



### 1.2.3 Re-send notification to contributors

School Users can re-send notifications to contributor(s) to remind them to download the PF Statement through e-PFS.

Showing 1 to 1 of 1 entries

<input type="checkbox"/>	Name of Contributor	SRN	Status	Email Address From e-Services	Last email send date	Acknowledged (Y/N)	Date of Acknowledgement	Action
<input type="checkbox"/>	WONG XXXXXX	12345678	Delivered	wongxxxxxx@outlook.com	31/01/2024	N		

Showing 1 to 1 of 1 entries

[Send Notification](#) [Export To Excel](#)

Steps:

1. Check the box next to the “Name of Contributor” whose “Status” is “Delivered” to select contributor(s).
2. Click “Send Notification” button.
3. Click “Yes” to confirm the action.

Confirm Dialog

Are you sure to send the notification?

[YES](#) [No](#)

4. The “Status” of the Contributor will change to “Pending Re-delivery” and the notification email will be sent to the selected contributor(s) by the system scheduled at late evening.

Notification to contributors have been successfully scheduled to be sent

Delivery of PF Statements to Contributors

Cycle of Provident Fund Statements : 2025-08 (Annual Run)

Status : [All](#)

Contributor's Staff Reference Number (SRN) : 12345678

Contributor's Name :

[Search](#)

Showing 1 to 1 of 1 entries

<input type="checkbox"/>	Name of Contributor	SRN	Status	Email Address From e-Services	Last email send date	Acknowledged (Y/N)	Date of Acknowledgement	Action
<input checked="" type="checkbox"/>	WONG XXXXXX	12345678	Pending Re-delivery	wongxxxxxx@outlook.com	31/01/2024	N		

Showing 1 to 1 of 1 entries

[Send Notification](#) [Export To Excel](#)

5. The “Status” will change to “Re-delivered” after the notification email is resent to contributor(s).

Showing 1 to 1 of 1 entries

<input type="checkbox"/>	Name of Contributor	SRN	Status	Email Address From e-Services	Last email send date	Acknowledged (Y/N)	Date of Acknowledgement	Action
<input type="checkbox"/>	WONG XXXXXX	12345678	Re-delivered	wongxxxxxx@outlook.com	31/01/2024	N		<a href="#">Close</a>

Showing 1 to 1 of 1 entries

[Send Notification](#) [Export To Excel](#)

### 1.2.4 Close the case of delivery of PF Statement

School Users can close the case of delivery of PF Statement for contributor(s) when (i) the contributor(s) have not acknowledged the receipt of PF Statement after the notification is re-delivered or (ii) the contributor(s) have no email addresses maintained in the e-Services. For these contributors, School Users may arrange PF Statement distribution outside the e-PFS.

Show 25 entries

Filter :

Showing 1 to 3 of 3 entries

Previous 1 Next

<input type="checkbox"/>	Name of Contributor	SRN	Status	Email Address From e-Services	Last email send date	Acknowledged (Y/N)	Date of Acknowledgement	Action
<input type="checkbox"/>	CHAN XXX XXX	12345679	Acknowledged	chanxxxxx@gmail.com	31/01/2024	Y	31/01/2024 12:47	
<input type="checkbox"/>	WONG XXX XXX	12345678	Re-delivered	wongxxxxx@outlook.com	31/01/2024	N		<a href="#">Close</a>
<input type="checkbox"/>	LEE XXX XXX	12345677	New			N		<a href="#">Close</a>

Showing 1 to 3 of 3 entries

[Send Notification](#) [Export To Excel](#)

Previous 1 Next

Steps:

1. Click “Close” button in the “Action” Column.
2. The “Status” of the contributor will change to “Closed”.

Show 25 entries

Filter :

Showing 1 to 3 of 3 entries

Previous 1 Next

<input type="checkbox"/>	Name of Contributor	SRN	Status	Email Address From e-Services	Last email send date	Acknowledged (Y/N)	Date of Acknowledgement	Action
<input type="checkbox"/>	CHAN XXX XXX	12345679	Acknowledged	chanxxxxx@gmail.com	31/01/2024	Y	31/01/2024 12:47	
<input type="checkbox"/>	WONG XXX XXX	12345678	Closed	wongxxxxx@outlook.com	31/01/2024	N		
<input type="checkbox"/>	LEE XXX XXX	12345677	Closed			N		

Showing 1 to 3 of 3 entries

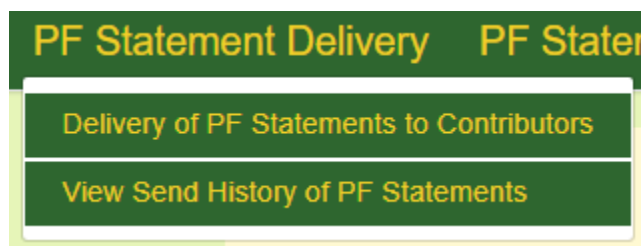
[Send Notification](#) [Export To Excel](#)

Previous 1 Next



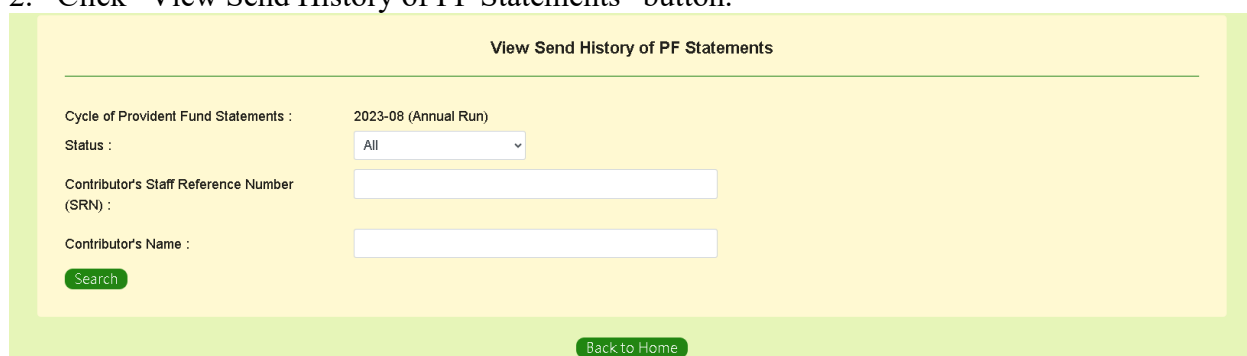
### 1.3 View Send History of PF Statements

This function allows School Users to view the delivery history of PF Statements.



Steps:

1. Move the mouse cursor over the tab “PF Statement Delivery”.
2. Click “View Send History of PF Statements” button.

A screenshot of a web application form titled 'View Send History of PF Statements'. The form is set against a light yellow background. It contains several input fields: 'Cycle of Provident Fund Statements :' with the value '2023-08 (Annual Run)', 'Status :' with a dropdown menu showing 'All', 'Contributor's Staff Reference Number (SRN) :' with a text input field, and 'Contributor's Name :' with a text input field. There is a green 'Search' button at the bottom left of the form. At the bottom center of the page, there is a green 'Back to Home' button.

### 1.3.1 List out the history of sending notification to contributors of the current cycle

Cycle of Provident Fund Statements :	2023-08 (Annual Run)
Status :	All
Contributor's Staff Reference Number (SRN) :	1234567
Contributor's Name :	
<a href="#">Search</a>	

#### Steps:

1. Select “Status” and input “Contributor’s Staff Reference Number (SRN)” or “Contributor’s Name”, or leave them blank to search all contributors.
2. Click “Search” button.
3. The list of history of sending notification will be shown.

View Send History of PF Statements				
<hr/>				
Cycle of Provident Fund Statements :	2023-08 (Annual Run)			
Status :	All			
Contributor's Staff Reference Number (SRN) :	1234567			
Contributor's Name :				
<a href="#">Search</a>				
Show 50 entries				
Showing 1 to 3 of 3 entries				
Filter :				
Previous 1 Next				
Name of Contributor	SRN	Status	Email Address From e-Services	Last email send date
CHAN XXX XXX	12345679	Delivered	chanxxxxx@gmail.com	31/01/2024
WONG XXX XXX	12345678	Re-delivered	wongxxxxx@outlook.com	31/01/2024
LEE XXX XXX	12345678	Delivered	leexxxxxx@yahoo.com	31/01/2024
Showing 1 to 3 of 3 entries				
<a href="#">Export To Excel</a>				
Previous 1 Next				

### 1.3.2 Export contributor list to Excel file

Show 50 entries

Filter :

Showing 1 to 3 of 3 entries

Previous 1 Next

Name of Contributor	SRN	Status	Email Address From e-Services	Last email send date
CHAN XXX XXX	12345679	Delivered	chanxxxxx@gmail.com	31/01/2024
WONG XXX XXX	12345678	Re-delivered	wongxxxxx@outlook.com	31/01/2024
LEE XXX XXX	12345678	Delivered	leexxxxxx@yahoo.com	31/01/2024

Showing 1 to 3 of 3 entries

Previous 1 Next

Export To Excel

Steps:

1. Click “Export to Excel” button.
2. Create and input a password to encrypt the Excel file to be exported.

Showing 1 to 3 of 3 entries

Export To Excel

Set Password For Downloading Report

Password

Create a password at least 8 characters which contain at least one lowercase letter, one uppercase letter, one numeric digit and one special characters (!, @, %, &, or \_)

Cancel Download

Showing 1 to 3 of 3 entries

Export To Excel

Previous 1 Next

3. Click “Download” button.
4. After the download is completed, go to the browser’s download folder and open the Excel file by inputting the password created in Step 2.

PFStatementContributorSendHistory\_en\_2024.01.31.15.45.16.xlsx - Excel

File Home Insert Page Layout Formulas Data Review View Tell me what you want to do... CHAN, Wai-kei Mike Share

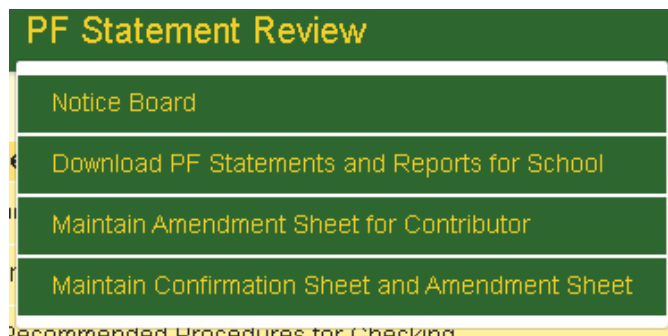
	A	B	C	D	E	F	G	H
1	<b>View Send History of PF Statements</b>							
2	Cycle of Provident Fund Statements :	2023-08 (Annual Run)						
3	Status :	All						
4	Contributor's Staff Reference Number (SRN):							
5	Contributor's Name:							
6								
7	<b>Name of Contributor</b>	<b>SRN</b>	<b>Status</b>	<b>Email Address From e-Services</b>	<b>Last email send date</b>			
8	CHAN XXX XXX	12345679	Delivered	chanxxxxx@gmail.com	31/01/2024			
9	WONG XXX XXX	12345678	Re-delivered	wongxxxxx@outlook.com	31/01/2024			
10	LEE XXX XXX	12345678	Delivered	leexxxxxx@yahoo.com	31/01/2024			

## 1.4 Notice Board

This function allows School Users to obtain the documents posted by EDB for the latest PF Statement cycle. Notice Board is the “Home” page of e-PFS. The following documents with ✓ are available for downloading during the Cycle:

Documents	Annual Run Cycle	Dividend Run Cycle
1. Letter to School	✓	✓
2. Appendix I - Provident Fund Statement Amendment Sheet	✓	
3. Appendix II - Recommended Procedures for Checking	✓	
4. Appendix III - Provident Fund Statements Confirmation Sheet	✓	
5. Guidance Notes to Teacher-contributor	✓	✓
6. Note to School Supervisor	✓	✓

School Users can click “View” to download them.



Steps:

1. Move the mouse cursor over the tab “PF Statement Review”.
2. Click “Notice Board” button.

### 1.4.1 Download the documents

Notice Board from EDB

Cycle of Provident Fund Statements :2023-08 (Annual Run)

Status :In Progress

Document Reference	Description	Action
	Letter to School	<a href="#">View</a>
	Appendix I - Provident Fund Statement Amendment Sheet	<a href="#">View</a>
	Appendix II - Recommended Procedures for Checking	<a href="#">View</a>
	Appendix III - Provident Fund Statements Confirmation Sheet	<a href="#">View</a>
	Guidance Notes to Teacher-contributor	<a href="#">View</a>
	Note to School Supervisor	<a href="#">View</a>

[Back to Home](#)

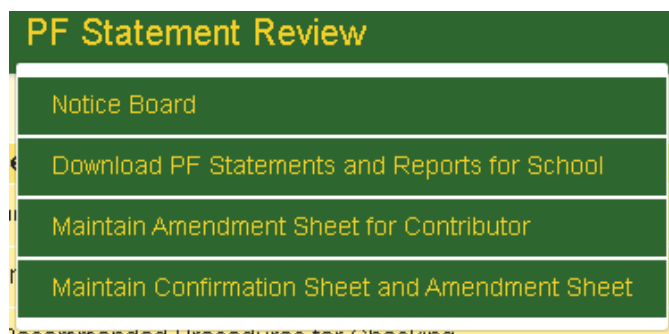
#### Steps:

1. Click “View” button next to the name of the “Document Reference Description”.
2. The document will be downloaded.
3. After the download is completed, go to the browser’s download folder and open the pdf file.



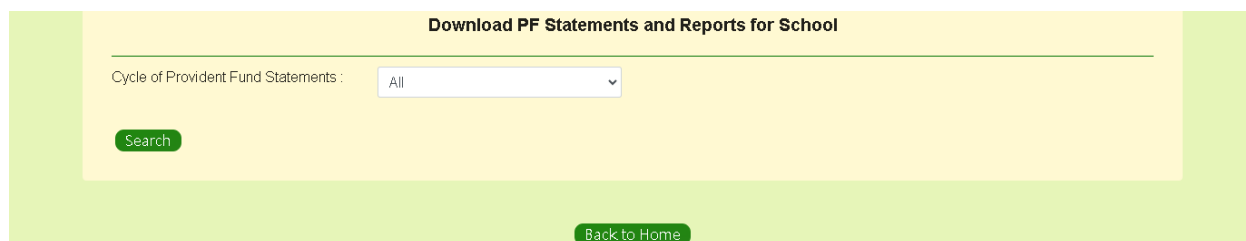
## 1.5 Download PF Statements and Reports for School

This function allows School Users to download the PF Statements and reports of specific cycle of PF Statements.



Steps:

1. Move the mouse cursor over the tab “PF Statement Review”.
2. Click “Download PF Statements and Reports for School” button.



### 1.5.1 Download PF Statements and Reports for School

Download PF Statements and Reports for School

Cycle of Provident Fund Statements : 2023-08 (Annual Run) ▼

Search

Steps:

1. Select the “Cycle of Provident Fund Statements”.
2. Click “Search” button.
3. The list of Provident Fund Statements and reports will be shown.

Download PF Statements and Reports for School

Cycle of Provident Fund Statements : 2023-08 (Annual Run) ▼

Search

Show 50 ▼ entries

Showing 1 to 3 of 3 entries

<input type="checkbox"/>	Report Description	Report ID	Cycle	Report Generation Date
<input type="checkbox"/>	Provident Fund Annual Reconciliation Statement	ED3007A	2023-08	2023-12-28 14:31:09
<input type="checkbox"/>	Provident Fund Non-contributors List	ED3005A	2023-08	2023-12-28 14:31:09
<input type="checkbox"/>	Provident Fund Statement		2023-08	2023-12-28 14:30:29

Showing 1 to 3 of 3 entries

Download

Previous 1 Next

Back to Home

4. Check the box(es) next to the Provident Fund Statements or reports.
5. Click “Download” button.
6. Create and input a password to encrypt the pdf file(s) to be downloaded.

Show 50 ▼ entries

Showing 1 to 3 of 3 entries

<input type="checkbox"/>	Report Description	Report ID	Cycle	Report Generation Date
<input type="checkbox"/>	Provident Fund Annual Reconciliation Statement			2023-12-28 14:31:09
<input type="checkbox"/>	Provident Fund Non-contributors List			2023-12-28 14:31:09
<input checked="" type="checkbox"/>	Provident Fund Statement		2023-08	2023-12-28 14:30:29

Showing 1 to 3 of 3 entries

Download

Previous 1 Next

Set Password For Downloading Report

Password

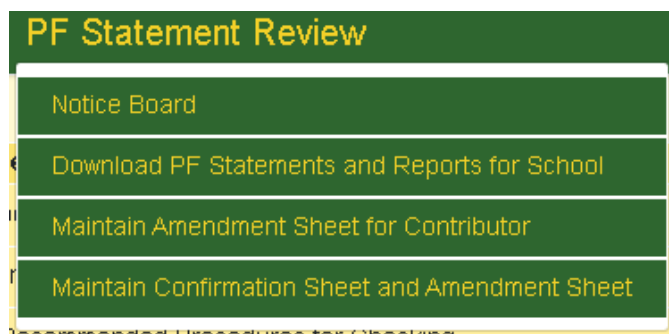
Create a password at least 8 characters which contain at least one lowercase letter, one uppercase letter, one numeric digit and one special characters (!,\$,#,%,&,- or \_)

Cancel Download ✓

7. Click “Download” button.
8. After the download is completed, go to the browser’s download folder and open the downloaded file by inputting the password created in Step 6.

## 1.6 Maintain Amendment Sheet for Contributor

This function allows School Users to prepare the Amendment Sheet to EDB during the **Annual Run** cycle only.



Steps:

1. Move the mouse cursor over the tab “PF Statement Review”.
2. Click “Maintain Amendment Sheet for Contributor” button.
3. Contact details and a list of existing Amendment Sheet will be shown.

A screenshot of the "Maintain Amendment Sheet for Contributor" web form. The form has a yellow header with the title "Maintain Amendment Sheet for Contributor". Below the header, there is a section for "Cycle of Provident Fund Statements :" with the value "2023-08 (Annual Run)". There are two mandatory fields: "Telephone to Contact :" and "Person to Contact :". The "Person to Contact :" field has two sub-fields for "(In English)" and "(In Chinese)". A green "Save Contact" button is located below these fields. A note "\*Mandatory fields" is on the right. Below the form is a table area with "Show 50 entries" and a "Filter :" dropdown. The table has columns "No.", "Contributor with Amendment Sheet", and "SRN". A message "No result found, Please search again." is displayed in the table. Below the table are four green buttons: "Add Amendment Sheet", "Update Amendment Sheet", "View Amendment Sheet", and "Remove Amendment Sheet". "Previous" and "Next" buttons are also present. At the bottom, there is a green "Back to Home" button.

### 1.6.1 Input contact information for Amendment Sheet to EDB

Maintain Amendment Sheet for Contributor

Cycle of Provident Fund Statements :

2025-08 (Annual Run)

\* Telephone to Contact :

12131221

Person to Contact :

Chan Tai Man

(In English)

(In Chinese)

Save Contact

Mandatory fields

Steps:

1. Input “Telephone to Contact” and “Person to Contact”.
2. Click “Save Contact” button.

Contact save successfully

Maintain Amendment Form for individual PF Contributor

Cycle of Provident Fund Statements :

2023-08 (Annual Run)

\* Telephone to Contact :

12131221

Person to Contact :

Chan Tai Man

(In English)

(In Chinese)

Save Contact

## 1.6.2 Add Amendment Sheet

Show  entries

Filter :

Previous Next

No.	Contributor with Amendment Sheet	SRN
No result found, Please search again.		

Previous Next

[Add Amendment Sheet](#) [Update Amendment Sheet](#) [View Amendment Sheet](#) [Remove Amendment Sheet](#)

### Steps:

1. Click “Add Amendment Sheet” button.
2. “Add Amendment Sheet Detail” page is shown.

**Add Amendment Sheet Detail**

Name of Teacher Contributor :  \* SRN :

(\* Please checked where applicable)

	Provident Fund Statement	School's Record
(A) * <input type="checkbox"/> Name :		<input type="text"/> (As shown in HKID card)
(B) Current Year Total :		
* <input type="checkbox"/> Contribution :		\$ <input type="text"/>
* <input type="checkbox"/> Donation :		\$ <input type="text"/>
* <input type="checkbox"/> Dividend :		\$ <input type="text"/>
(C) Date :		
* <input type="checkbox"/> Entry to Scheme :		<input type="text"/>
* <input type="checkbox"/> Complete 10 Yrs. Service :		<input type="text"/>
* <input type="checkbox"/> Complete 15 Yrs. Service :		<input type="text"/>

Detailed remarks for the above Discrepancies :

[Save](#) [Cancel](#)

3. Select the “SRN” of the contributor whose records need to be amended.
4. The PF statement details of the selected contributor will be shown.

**Add Amendment Sheet Detail**

Name of Teacher Contributor : Kung Kuan Jen \* SRN :

(\* Please checked where applicable)

	Provident Fund Statement	School's Record
(A) * <input type="checkbox"/> Name :	Kung Kuan Jen	<input type="text"/> (As shown in HKID card)
(B) Current Year Total :		
* <input type="checkbox"/> Contribution :	\$ 0.00	\$ <input type="text"/>
* <input type="checkbox"/> Donation :	\$ 0.00	\$ <input type="text"/>
* <input type="checkbox"/> Dividend :	\$ 0.00	\$ <input type="text"/>
(C) Date :		
* <input type="checkbox"/> Entry to Scheme :	01/09/1993	<input type="text"/>
* <input type="checkbox"/> Complete 10 Yrs. Service :	31/08/2003	<input type="text"/>
* <input type="checkbox"/> Complete 15 Yrs. Service :	31/08/2008	<input type="text"/>

Detailed remarks for the above Discrepancies :

[Save](#) [Cancel](#)

- Check the applicable box(es) for which amendments are proposed and input the records kept by the school to the corresponding field(s) under “School’s Record” column.

**Add Amendment Sheet Detail**

Name of Teacher Contributor : Kung Kuan Jen \* SRN : 12345677 (1)

(\* Please checked where applicable)

	Provident Fund Statement	School's Record	
(A) * <input checked="" type="checkbox"/> Name :	Kung Kuan Jen	Kung Kuan Jen Ken	(As shown in HKID card)
(B) Current Year Total :			
* <input type="checkbox"/> Contribution :	\$ 0.00	\$	
* <input checked="" type="checkbox"/> Donation :	\$ 0.00	\$ 15000.00	
* <input type="checkbox"/> Dividend :	\$ 0.00	\$	
(C) Date :			
* <input type="checkbox"/> Entry to Scheme :	01/09/1993		
* <input type="checkbox"/> Complete 10 Yrs. Service :	31/08/2003		
* <input type="checkbox"/> Complete 15 Yrs. Service :	31/08/2008		

Detailed remarks for the above Discrepancies :

Save Cancel

- Click “Save” button.

The amendment sheet has been successfully saved

Maintain Amendment Sheet for Contributor

### 1.6.3 Update Amendment Sheet

Show 50 entries

Filter :

Showing 1 to 1 of 1 entries

Previous 1 Next

No.	Contributor with Amendment Sheet	SRN
<input type="checkbox"/> 1	Kung Kuan Jen	12345677

Showing 1 to 1 of 1 entries

Previous 1 Next

[Add Amendment Sheet](#) [Update Amendment Sheet](#) [View Amendment Sheet](#) [Remove Amendment Sheet](#)

Steps:

1. Look up the name of the contributor whose Amendment Sheet requires an update.
2. Check the box next to the “Contributor with Amendment Sheet”.
3. Click “Update Amendment Sheet” button.
4. “Update Amendment Sheet Detail” page is shown.

**Update Amendment Sheet Detail**

Name of Teacher Contributor : Kung Kuan Jen \* SRN : 12345677 (1 )

(\* Please checked where applicable )

(A)	* <input checked="" type="checkbox"/> Name :	Provident Fund Statement Kung Kuan Jen	School's Record Kung Kuan Jen Ken (As shown in HKID card)
(B)	Current Year Total :		
	* <input type="checkbox"/> Contribution :	\$ 0.00	\$
	* <input checked="" type="checkbox"/> Donation :	\$ 0.00	\$ 15000.00
	* <input type="checkbox"/> Dividend :	\$ 0.00	\$
(C)	Date :		
	* <input type="checkbox"/> Entry to Scheme :	01/09/1993	
	* <input type="checkbox"/> Complete 10 Yrs. Service :	31/08/2003	
	* <input type="checkbox"/> Complete 15 Yrs. Service :	31/08/2008	

Detailed remarks for the above Discrepancies :

[Save](#) [Cancel](#)

5. Update the inputted value(s) under “School’s Record” column where necessary.
6. Click “Save” button.

The amendment sheet has been successfully saved

Maintain Amendment Sheet for Contributor

## 1.6.4 View Amendment Sheet

Show 50 entries

Showing 1 to 1 of 1 entries

Filter :

Previous 1 Next

No.	Contributor with Amendment Sheet	SRN
<input type="checkbox"/> 1	Kung Kuan Jen	12345677

Showing 1 to 1 of 1 entries

Previous 1 Next

[Add Amendment Sheet](#) [Update Amendment Sheet](#) [View Amendment Sheet](#) [Remove Amendment Sheet](#)

### Steps:

1. Look up the name of the contributor whose Amendment Sheet requires viewing.
2. Check the box next to the “Contributor with Amendment Sheet”.
3. Click “View Amendment Sheet” button.
4. “View Amendment Sheet Detail” page is shown.

**View Amendment Sheet Detail** x

Name of Teacher Contributor : Kung Kuan Jen \* SRN : 12345677 (1 )

( \* Please checked where applicable )

(A)	* Name :	Provident Fund Statement Kung Kuan Jen	School's Record Kung Kuan Jen Ken (As shown in HKID card)
(B)	Current Year Total :		
	* Contribution :		\$ <input type="text"/>
	* Donation :	\$ 0.00	\$ 15000.00
	* Dividend :		\$ <input type="text"/>
(C)	Date :		
	* Entry to Scheme :	<input type="text"/>	
	* Complete 10 Yrs. Service :	<input type="text"/>	
	* Complete 15 Yrs. Service :	<input type="text"/>	

Detailed remarks for the above Discrepancies :

[Back](#)



## 1.6.5 Remove Amendment Sheet

Showing 1 to 1 of 1 entries

No.	Contributor with Amendment Sheet	SRN
1	Kung Kuan Jen	12345677

Showing 1 to 1 of 1 entries

[Add Amendment Sheet](#) [Update Amendment Sheet](#) [View Amendment Sheet](#) [Remove Amendment Sheet](#)

### Steps:

1. Look up the name of the contributor whose Amendment Sheet requires removal.
2. Check the box next to the “Contributor with Amendment Sheet”.
3. Click “Remove Amendment Sheet” button.
4. “Remove Amendment Sheet Detail” page is shown.

Name of Teacher Contributor : Kung Kuan Jen \* SRN : 12345677 (1)

(\* Please checked where applicable)

(A) \* Name : Kung Kuan Jen (As shown in HKID card)

(B) Current Year Total :

\* Contribution : \$ 0.00

\* Donation : \$ 0.00

\* Dividend : \$ 0.00

(C) Date :

\* Entry to Scheme : 01/09/1993

\* Complete 10 Yrs. Service : 31/08/2003

\* Complete 15 Yrs. Service : 31/08/2008

Detailed remarks for the above Discrepancies :

[Cancel](#) [Remove](#)

5. Click “Remove” button.

Confirm Dialog

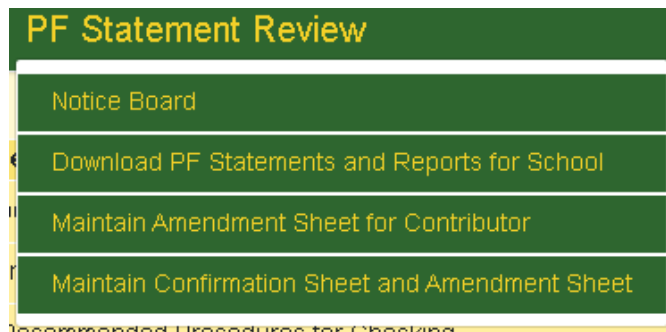
Confirm to remove the amendment sheet?

[YES](#) [No](#)

6. Click “Yes” button to confirm the selected Amendment Sheet to be removed.

## 1.7 Maintain Confirmation Sheet and Amendment Sheet

This function allows School Users to prepare the “Confirmation Sheet” and “Amendment Sheet” to EDB during the Annual Run cycle. When the “Status” of all contributors of the school have changed to “Acknowledged” or “Closed”, the system will automatically send a notification to School Users via SMM with subject “Reminder to School for the Completion of Confirmation Sheet and Amendment Sheet”. It aims to remind School Users to complete the “Confirmation Sheet” and “Amendment Sheet” (if any) and submit them to EDB.



Steps:

1. Move the mouse cursor over the tab “PF Statement Review”.
2. Click “Maintain Confirmation Sheet and Amendment Sheet” button.

A screenshot of a web form titled "Maintain Confirmation Sheet and Amendment Sheet" in a green header. The form has a light yellow background. It contains two dropdown menus: "Cycle of Provident Fund Statements :" with "All" selected, and "Status :" with "Pending Acknowledgement" selected. Below the dropdowns is a green "Search" button. At the bottom of the form, there is a green "Back to Home" button.

### 1.7.1 Edit Confirmation Sheet

**Maintain Confirmation Sheet and Amendment Sheet**

Cycle of Provident Fund Statements :

2023-08

Status :

Pending Acknowledgement

Search

Steps:

1. Select Annual Run for “Cycle of Provident Fund Statements” and “Pending Acknowledgement for “Status”.
2. Click “Search” to list out available Confirmation Sheet to view or edit.

**Maintain Confirmation Sheet and Amendment Sheet**

Cycle of Provident Fund Statements :

All

Status :

Pending Acknowledgement

Search

Show 50 entries

Showing 1 to 1 of 1 entries

Filter : 

Previous 1 Next

Statement Cycle of Provident Fund Statements (Annual Run)	Status	Submission Channel	Submission Date	No. of PF statements collected	No. of Amendment Sheet
<input type="checkbox"/> 2023-08	Pending Acknowledgement			88	1

Showing 1 to 1 of 1 entries

Previous 1 Next

Edit View

3. Check the box next to the “Statement Cycle of Provident Fund Statements (Annual Run)”.
4. Click ‘Edit’ button.
5. The “Maintain Confirmation Sheet and Amendment Sheet Details” page is shown.

**Maintain Confirmation Sheet and Amendment Sheet Details**

Cycle of Provident Fund Statements :

2023-08 (Annual Run)

\* Telephone to Contact :

12131221

(in English)

Person to Contact :

Chan Tai Man

(in Chinese)

Name of Supervisor :

(in English)

(in Chinese)

Date on Confirmation Sheet and Amendment Sheet :

Number of PF Statements Generated:

88

Number of Amendment Sheet/s:

1

I confirm that :

(I) Each teacher-contributor has been given an electronic copy of Provident Fund Statement (ED1048) together with 'Guidance Notes to Teacher-contributor'. The duplicate copies of the Provident Fund Statements have been retained in school for record purpose.

(II) The Provident Fund Annual Reconciliation Statement (ED3007A) and Provident Fund Statement (ED1048) have been checked and

(a) 87 Statements are found correct; and

(b) 1 copy/copies of Amendment Sheet/s together with supporting document (if any) is/are attached herewith for necessary investigation and rectification.

Save Submit to School Supervisor for Confirmation Print Confirmation Sheet and Amendment Sheet Submit to EDB

\*Mandatory fields

6. Input/Update Telephone to Contact, Person to Contact and Name of Supervisor.
7. Click “Save” button

Confirmation sheet save successfully

X

## Maintain Confirmation Sheet and Amendment Sheet Details

Cycle of Provident Fund Statements : 2023-08 (Annual Run)

\* Telephone to Contact : 12131221

Person to Contact : Chan Tai Man

\*(in English)

陳大文

(in Chinese)

Name of Supervisor : Test Supervisor AAA

\*(in English)

校監甲甲甲

(in Chinese)

Date on Confirmation Sheet and  
Amendment Sheet :

Number of PF Statements Generated: 88

Number of Amendment Sheet/s: 1

I confirm that :

(I) Each teacher-contributor has been given an electronic copy of Provident Fund Statement (ED1048) together with 'Guidance Notes to Teacher-contributor'. The duplicate copies of the Provident Fund Statements have been retained in school for record purpose.

(II) The Provident Fund Annual Reconciliation Statement (ED3007A) and Provident Fund Statement (ED1048) have been checked and

(a) 87 Statements are found correct; and

(b) 1 copy/copies of Amendment Sheet/s together with supporting document (if any) is/are attached herewith for necessary investigation and rectification.

Save

Submit to School Supervisor for Confirmation

Print Confirmation Sheet and Amendment Sheet

Submit to EDB

\*Mandatory fields

## Provident Fund Non-contributors List (ED3005A)

## Amendment Sheet

Show 50 entries

Filter :

Showing 1 to 1 of 1 entries

Previous 1 Next

No.	Contributor with Amendment Sheet	SRN
<input type="checkbox"/> 1	Kung Kuan Jen	12345677

Showing 1 to 1 of 1 entries

Previous 1 Next

Add Amendment Sheet

Update Amendment Sheet

View Amendment Sheet

Remove Amendment Sheet

## 1.7.2 Maintain Amendment Sheet

This function allows School Users to maintain the “Amendment Sheet”. Please refer to Section 1.6 above for the procedures.

Provident Fund Non-contributors List (ED3005A)

Amendment Sheet

Show 50 entries

Filter :

Showing 1 to 1 of 1 entries

Previous

1

Next

No.	Contributor with Amendment Sheet	SRN
<input type="checkbox"/> 1	Kung Kuan Jen	12345677

Showing 1 to 1 of 1 entries

Previous

1

Next

Add Amendment Sheet

Update Amendment Sheet

View Amendment Sheet

Remove Amendment Sheet

### 1.7.3 Download Provident Fund Non-contributors List (ED3005A)

Provident Fund Non-contributors List (ED3005A)

**Amendment Sheet**

Show 50 entries

Showing 1 to 1 of 1 entries

Filter :

Previous 1 Next

No.	Contributor with Amendment Sheet	SRN
1	Kung Kuan Jen	12345677

Showing 1 to 1 of 1 entries

Previous 1 Next

[Add Amendment Sheet](#) [Update Amendment Sheet](#) [View Amendment Sheet](#) [Remove Amendment Sheet](#)

#### Steps:

1. Click “Provident Fund Non-contributors List (ED3005A)” button.
2. Create and input a password to encrypt the report.

Date on Confirmation Sheet and Amendment Sheet :

Number of PF Statements Generated:

Number of Amendment Sheet/s:

I confirm that :

(I) Each teacher-contributor has been given duplicate copies of the Provident Fund Statement (ED1048) to Teacher-contributor'. The

(II) The Provident Fund Annual Reconciliation Statement (ED3007A) and Provident Fund Statement (ED1048) have been checked and all are found correct.

Set Password For Downloading Report

Password

Create a password at least 8 characters which contain at least one lowercase letter, one uppercase letter, one numeric digit and one special characters (!, \$, #, %, @, -, or \_)

[Cancel](#) [Download](#)

Provident Fund Non-contributors List (ED3005A)

\*Mandatory fields

3. Click “Download” button.
4. After the download is completed, go to the browser’s download folder and open the downloaded report by inputting the password created in Step 2.

### 1.7.4 Submit to School Supervisor for confirmation

When the “Status” of all contributors of the school have changed to “Acknowledged” or “Closed”, the “Submit to School Supervisor for Confirmation” button will be enabled.

[Save](#) [Submit to School Supervisor for Confirmation](#) [Print Confirmation Sheet and Amendment Sheet](#) [Submit to EDB](#)

\*Mandatory fields

Steps:

1. Click “Submit to School Supervisor for Confirmation” button.
2. The status will change to “Pending Confirmation” and the “Confirmation Sheet” is no longer allowed to be modified and no “Amendment Sheet” can be added, modified or deleted.

Confirmation Sheet has been successfully submitted to School Supervisor x

Maintain Confirmation Sheet and Amendment Sheet Details

Cycle of Provident Fund Statements : 2023-08 (Annual Run)

\* Telephone to Contact : 12131221

Person to Contact : Chan Tai Man (in English)  
陳太文 (in Chinese)

Name of Supervisor : Test Supervisor AAA (in English)  
校監甲甲甲 (in Chinese)

Date on Confirmation Sheet and Amendment Sheet :

Number of PF Statements Generated: 88

Number of Amendment Sheet/s: 1

I confirm that :  
(I) Each teacher-contributor has been given an electronic copy of Provident Fund Statement (ED1048) together with 'Guidance Notes to Teacher-contributor'. The duplicate copies of the Provident Fund Statements have been retained in school for record purpose.  
(II) The Provident Fund Annual Reconciliation Statement (ED3007A) and Provident Fund Statement (ED1048) have been checked and  
(a) 87 Statements are found correct; and  
(b) 1 copy/copies of Amendment Sheet/s together with supporting document (if any) is/are attached herewith for necessary investigation and rectification.

[Save](#) [Submit to School Supervisor for Confirmation](#) [Print Confirmation Sheet and Amendment Sheet](#) [Submit to EDB](#)

\*Mandatory fields

Provident Fund Non-contributors List (ED3005A)

Amendment Sheet

Show 50 entries

Showing 1 to 1 of 1 entries

Filter :

Previous 1 Next

No.	Contributor with Amendment Sheet	SRN
1	Kung Kuan Jen	12345677

Showing 1 to 1 of 1 entries

View Amendment Sheet

Previous 1 Next

### 1.7.5 Submit to EDB

After the “Confirmation Sheet” and “Amendment Sheet” are submitted to School Supervisor for confirmation, the buttons “Print Confirmation and Amendment Sheet” and “Submit to EDB” are enabled.

**Maintain Confirmation Sheet and Amendment Sheet Details**

Cycle of Provident Fund Statements : 2023-08 (Annual Run)

\* Telephone to Contact : 12131221

Person to Contact : Chan Tai Man (in English)  
陳大文 (in Chinese)

Name of Supervisor : Test Supervisor AAA (in English)  
校監甲甲甲 (in Chinese)

Date on Confirmation Sheet and Amendment Sheet :

Number of PF Statements Generated: 88

Number of Amendment Sheet/s: 1

I confirm that :

(i) Each teacher-contributor has been given an electronic copy of Provident Fund Statement (ED1048) together with 'Guidance Notes to Teacher-contributor'. The duplicate copies of the Provident Fund Statements have been retained in school for record purpose.

(ii) The Provident Fund Annual Reconciliation Statement (ED3007A) and Provident Fund Statement (ED1048) have been checked and

(a) 87 Statements are found correct; and

(b) 1 copy/copies of Amendment Sheet/s together with supporting document (if any) is/are attached herewith for necessary investigation and rectification.

Save Submit to School Supervisor for Confirmation Print Confirmation Sheet and Amendment Sheet Submit to EDB

\*Mandatory fields

Steps for signing the hardcopy of Confirmation Sheet and Amendment Sheet:

1. Click “Print Confirmation Sheet and Amendment Sheet” button to print out the hardcopy of Confirmation Sheet and Amendment Sheet for School Supervisor’s signing.
2. Scanned the Confirmation Sheet and Amendment Sheet and/or Provident Fund Non-contributor List signed by the School Supervisor **in PDF format** for uploading to e-PFS.
3. Click “Submit to EDB” button.
4. Upload the scanned copies of the signed documents **in PDF format** to e-PFS.

**Upload Signed Hardcopy**

Confirmation and Amendment Sheet : Choose File Browse

Provident Fund Non-contributors List : Choose File Browse

Submit Cancel

5. Click “Submit” button.
6. The “Status” will change to “Submitted”.

Steps for signing the Confirmation Sheet and Amendment Sheet via e-PFS using iAM Smart+:

1. After School Supervisor has signed the documents using iAM Smart+ (Please refer to Section 1.7.6), click “Submit to EDB” button.
2. The “Status” will change to “Submitted”.



### 1.7.6 Sign Confirmation Sheet and Amendment Sheet using iAM Smart+ (School Supervisor)

**Maintain Confirmation Sheet and Amendment Sheet**

Cycle of Provident Fund Statements :

All

Status :

Pending Confirmation

Search

Steps:

1. School Supervisors logon to the e-PFS.
2. The “Maintain Confirmation Sheet and Amendment Sheet” page is shown.
3. Select “All” for “Cycle of Provident Fund Statements” and “Pending Confirmation” for “Status”.
4. Click “Search” button.
5. The “Statement Cycle of Provident Fund Statements (Annual Run)” which is pending confirmation is shown.

**Maintain Confirmation Sheet and Amendment Sheet**

Cycle of Provident Fund Statements :

All

Status :

Pending Confirmation

Search

Show 50 entries

Showing 1 to 1 of 1 entries

Filter :

Previous 1 Next

Statement Cycle of Provident Fund Statements (Annual Run)	Status	Submission Channel	Submission Date	No. of PF statements collected	No. of Amendment Sheet
<input checked="" type="checkbox"/> 2023-08	Pending Confirmation			88	1

Showing 1 to 1 of 1 entries

Previous 1 Next

Edit

View

6. Check the box next to the “Statement Cycle of Provident Fund Statements (Annual Run)”.
7. Click “Edit” button.

8. The “Maintain Confirmation Sheet and Amendment Sheet Details” page is shown.

**Maintain Confirmation Sheet and Amendment Sheet Details**

---

Cycle of Provident Fund Statements : 2023-08 (Annual Run)

\* Telephone to Contact :

Person to Contact :  \* (in English)  
 (in Chinese)

Name of Supervisor :  \* (in English)  
 (in Chinese)

Date on Confirmation Sheet and Amendment Sheet :

Number of PF Statements Generated: 88

Number of Amendment Sheet/s: 1

I confirm that :

(I) Each teacher-contributor has been given an electronic copy of Provident Fund Statement (ED1048) together with 'Guidance Notes to Teacher-contributor'. The duplicate copies of the Provident Fund Statements have been retained in school for record purpose.

(II) The Provident Fund Annual Reconciliation Statement (ED3007A) and Provident Fund Statement (ED1048) have been checked and

(a) 87 Statements are found correct; and

(b) 1 copy/copies of Amendment Sheet/s together with supporting document (if any) is/are attached herewith for necessary investigation and rectification.

[Confirm and Sign with "iAM Smart"](#) [Return to School MSA/DSA to follow up](#)

\*Mandatory fields

9. Click “Confirm and Sign with “iAM Smart”” button.

Note: Click “Return to School MSA/DSA to follow up” button to reject the Confirmation Sheet and return the Confirmation Sheet to school MSA/DSA for amendment.


10. “Sign with “iAM Smart”” screen is shown.

**Sign with "iAM Smart"**

Please provide your Hong Kong Identity Card number for proceeding to use "iAM Smart+" to sign your submission. Please ensure you have registered with "iAM Smart+" and installed the "iAM Smart" mobile application on your mobile phone. For details about upgrade of "iAM Smart" account, please refer to the ["iAM Smart"](#)

\* HKID Number :   
(without bracket, eg. A123456(7) --> A123456)

---

 [Signing with iAM Smart](#) [Cancel](#)

[More info >](#)

11. Input the HKID of the School Supervisor.

12. Click “Signing with iAM Smart” button.

13. The following screen is shown.

Sign your application with "iAM Smart" ×


**Service Name : Electronic Distribution of Grant/Subsidized Schools Provident Fund Statements**

**Document : ePFS**

**Identification Code :3249**


**Please follow the steps below :**

- 1. Record the above information and identification code**
- 2. Open "iAM Smart" in mobile device and scan the QR code**
- 3. Check the document information and identification code in "iAM Smart" and complete the digital signing**



14. Click "Continue with iAM Smart" button.

15. "iAM Smart" screen with the QR Code is shown for digital-signing.

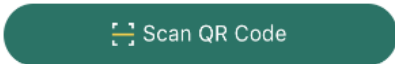

iAM Smart

English ▼


< Back to online service

**Digital-signing via iAM Smart :**

1. Please open iAM Smart App in your mobile
2. Tap the scan button in iAM Smart App



3. Scan the QR Code



16. Open the iAM Smart application in mobile phone to scan the QR Code for signing.

Note: iAM Smart+ account is required for digital signing. For details, please refer to <https://www.iamsmart.gov.hk/>

17. If the signing is completed successfully, it will return to the e-PFS.

## Maintain Confirmation Sheet and Amendment Sheet Details

Cycle of Provident Fund Statements : 2023-08 (Annual Run)

\* Telephone to Contact :

12131221

Person to Contact :

Chan Tai Man

\*(in English)

陳太文

(in Chinese)

Name of Supervisor :

Test Supervisor AAA

\*(in English)

校監甲甲甲

(in Chinese)

Date on Confirmation Sheet and  
Amendment Sheet :

Number of PF Statements Generated: 88

Number of Amendment Sheet/s: 1

I confirm that :

(I) Each teacher-contributor has been given an electronic copy of Provident Fund Statement (ED1048) together with 'Guidance Notes to Teacher-contributor'. The duplicate copies of the Provident Fund Statements have been retained in school for record purpose.

(II) The Provident Fund Annual Reconciliation Statement (ED3007A) and Provident Fund Statement (ED1048) have been checked and

(a) 87 Statements are found correct; and

(b) 1 copy/copies of Amendment Sheet/s together with supporting document (if any) is/are attached herewith for necessary investigation and rectification.

Confirm and Sign with "IAM Smart"

Return to School MSA/DSA to follow up

\*Mandatory fields

## 1.8 Logout



### Steps:

1. Click “Log Out” button at the top right corner of the e-PFS.