Guidelines on Using eForm D to Report Amendment of Student Particulars

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Note: "Student Information Management Application (STM)" is also known as "Student Information Management System (STIMS)"
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A. General Guidelines on Using eForm for Student Information Management System (STIMS)

I. How to enter the eForm for Student Information Management System (STIMS)

The eForm for STIMS is an application of **Education Information System (EdIS)**.   To access the eForm page, you have to logon through **Common Log-On System (CLO)**.   You may access the logon page at the following URL:

<p align="center"><code>clo.edb.gov.hk</code></p>

Alternatively, the CLO logon page can be accessed through the Education Bureau (EDB) Homepage (**www.edb.gov.hk > School Administration and Management > Administration > IT Systems for Schools > Common Log-On System**) as shown in the following screens:

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At the logon page, enter the Username and Password and click **<Logon>**.

(Please note: To use the eForm, you must use the user accounts of school administrators[1] or the personal user accounts[2] as delegated by school in CLO.)
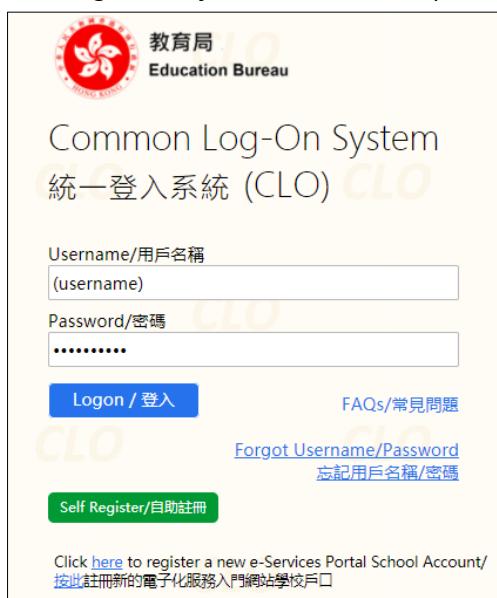
The CLO Main page will be shown.   Choose the tab **<Survey & eForm>** to access the **eForm for Student Information Management System (STIMS)** through the shortcut.
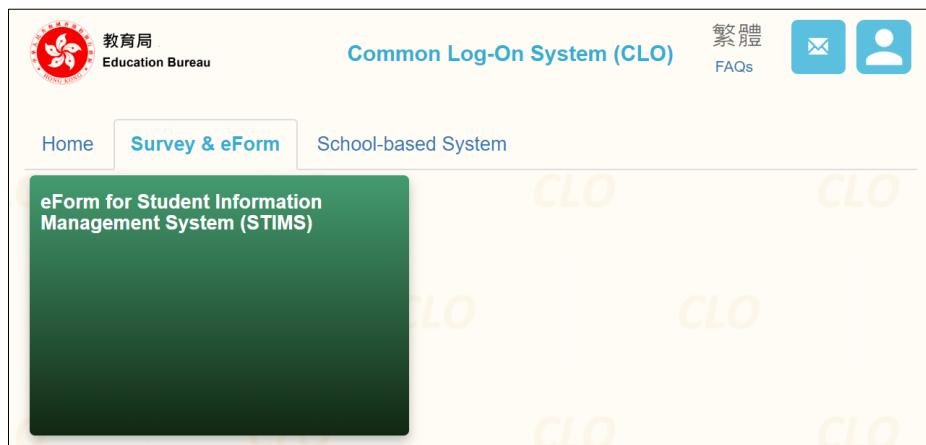
School users who can access the selected eForm for multiple schools will be redirected to a page for school selection before entering the eForm.

In the drop down list for school selection, only the schools that the school users have access right to the eForm will be listed.   Select the appropriate school and click **<Enter>** to access the eForm for the school.

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1 These accounts refer to the e-Services user account of the School Head or the Master School Administrator, and the CLO School Administrator account.

2 These accounts refer to the e-Services or Training Calendar System user account, and the CLO User account of school users.

For school users who can access the selected eForm for one school only, they will be redirected to the corresponding eForm right after clicking the eForm application shortcut at CLO.

The interface of the eForm is displayed in both Chinese and English, so changing of language is not necessary.

Please note that eForms for Student Information Management System (STIMS) have been revised. The data item names and descriptions are displayed in both Chinese and English.

請注意，學生資料管理系統(STIMS) 電子表格已作出更新，數據欄名稱及說明會同時以中文及英文顯示。

After logging on to the portal, the following selection menu will appear.

Form A	Report of Student Leaving / Absence from School	Enter 進入
表格 A	學生離校 / 缺課報告表格	
Form B	Form for Reporting Admission of Students with Student Reference Number	Enter 進入
表格 B	填報已有學生編號的入學學生表格	
Form C	Form for Reporting Admission of Students without Student Reference Number	Enter 進入
表格 C	填報未有學生編號的入學學生表格	
Form D	Student Particulars Amendment Form	Enter 進入
表格 D	學生資料更正表格	
Form E	Enrolment Survey	Enter 進入
表格 E	學生收錄實況調查	

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II. Select the School Language and a particular eForm

If your school operate more than one Language Group (e.g. one Anglo-Chinese and one Chinese), you must select the appropriate Language Group before selecting any eForms.

Click **<Enter>** on the right to select a particular eForm.

Remember: Always save your work before switching to work on another Language Group.

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III. Points-to-note/tips before you start

Download a copy of the latest edition of the ***Guidelines for the Student Information Management System (STIMS)***, (Path: **www.edb.gov.hk** > **Education System and Policy** > **Primary and Secondary Education** > **School Places Allocation Systems** > **Student Information Management System**) and read it carefully. You may need to refer to the Guidelines in updating the eForm.
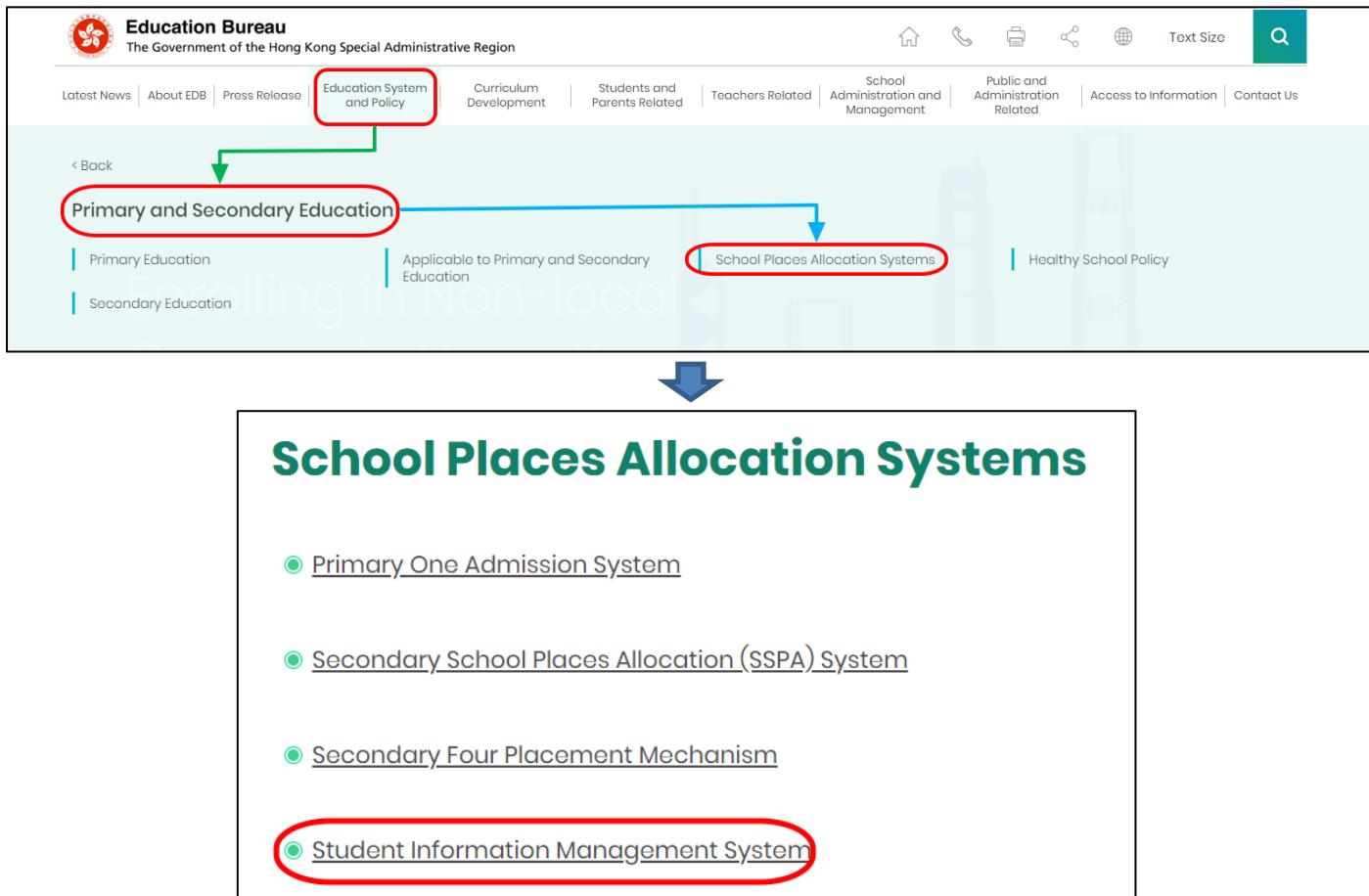
IV. Save the eForm regularly and frequently

- **Please save the eForm REGULARLY and FREQUENTLY**.
  - This helps to prevent data loss due to system problems.
  - The eForm will conduct a checking on the data when it is saved. If the eForm contains errors, it will display error messages with reason for failure. Please read the error message(s) carefully, then correct the error(s) and save the eForm again.
  - If the eForm contains many errors, it will take a long time to correct all errors one by one. You should therefore save your eForm regularly and avoid updating too many student records without saving your eForm.
  - If the eForm is saved successfully, the "Form Status" will become "Save" and the "Last Update Time" will display the time that you save the eForm. The message "Record updated successfully" will also be displayed.

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B. Guidelines on Using eForm D

eForm D is suitable for reporting amendment of student particulars.

I. **Tips for filling in the eForm D**

- The Class Name to be entered should be one of the Class Names reported in the "Class and Subject Details (C&SD) Survey" eForm.   Please liaise with the colleagues of your school who are responsible for C&SD Survey for using the same set of class names in both the C&SD Survey and Enrolment Survey.

- In the eForm, all the fields marked with asterisk "*" are mandatory.   This means that you must fill in all these mandatory fields.   If there are any unfilled mandatory fields, the eForm cannot be saved.   Therefore, please make sure that all the information is ready before you update the eForm.

- Please input all Date fields with the format 'DD/MM/YYYY'.   Inputting slashes '/', spaces or symbols between DD, MM and YYYY is not required.   For example, to input the date 11th August, 1995, enter "11081995".   On the other hand, you may use the calendar tool to select the exact date.
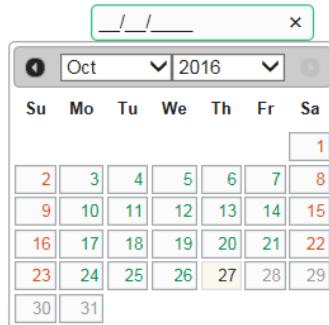
- Once the eForm D is submitted, all the data will be submitted and cannot be retrieved and re-submitted.   Please make sure you have verified all records and printed them (either in the form of hardcopy or softcopy) for filing purpose before submitting the eForm D.

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II. Add a record of amendment of student particulars

When you open a new eForm D or you have submitted your eForm D last time, a blank eForm will be displayed.

To add a record of amendment of student particulars, click **<Add Record>**.

A blank student particulars amendment form will be displayed. You must fill in "STRN" and "Student Name" (mandatory fields marked with an asterisk "*"))

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III. Completing the new record in eForm D

You should input data for item(s) to be amended only. Please note the following when you fill in the new record for eForm D:

a. Amendment to data items related to general student particulars

To amend general student particulars ('Student English Name', 'Student Chinese Name', 'Sex', 'D.O.B.', 'Home DC', 'Place of Birth', 'Ethnicity', 'Spoken Language at home'), just input the updated data to the data field(s) concerned.

Data input for the items 'Student Name' and 'Date of Birth' must tally with the original copy of the student's identity document. The Schools need to check against with student's HK Identity Card (or HK Birth Certificate if the student has not yet had the HK Identity Card). Only when the student does not possess these two documents, school may refer to other documents.

Please ensure that the Home District Council (DC) of a student is the district in which the student usually resides during the school days. For the students who live in the Mainland and travel daily to schools in Hong Kong, their Home DC should be reported as "Inapplicable" (or Home DC code reported as "X").

b. Amendment to data items related to New Arrival Children

Please note the following points in amending data items related to New Arrival Children,

i. The data field "Date of Entry from Mainland" is required for and only for students who do **not** possess a Hong Kong Birth Certificate, newly arrive from the Mainland and are admitted to the STIMS schools (e.g. public sector schools) for the first time.

ii. For all students who arrive from the Mainland and hold the **One-way Permit**, the school should report their Date of Entry from Mainland, otherwise, you will receive warning message when you save/submit the eform.

iii. In order to extract correct and complete students' records for use in the *Survey on Children from the Mainland Newly Admitted to Schools*, you are advised to report the Date of Entry from Mainland for all students who arrive from the Mainland and hold the One-way Permit accurately.

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iv. If the student is not newly arrived from the Mainland, please "✓" the "Delete New Arrival Children Indicator" check box.

c. Amendment to Identification data item

In making amendment to data items in the Identification, please note the following points.

- If the student possesses more than one identification documents, always select the ID document to be provided in the following priority:
  - HK Identity Card
  - Hong Kong Birth Certificate
  - Other identification document
- The school should report the Hong Kong Birth Certificate Number or HK Identity Card Number of the student concerned if he/she was born in Hong Kong.
- "Other Identification Document" should not be a HK Identity Card or Hong Kong Birth Certificate
- To add/amend the HK Identity Card Number, select "HKIC" in the ID Type pull down menu and input the HK Identity Card Number in the Document No. Skip the bracket in the last digit of the HK Identity Card Number. For example, if the HK Identity Card number is A000000(3), please enter A0000003 instead.

- To add/amend the HK Birth Certificate Number, select "HK Birth Certificate" in the ID Type pull down menu and input the HK Birth Certificate Number in the Document No.. Skip the bracket in the last digit of the HK Birth Certificate Number. For example, if the HK Birth Certificate number is A0000003, please enter A0000003.

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- For deletion of the HK Identity Card Number, please "✓" the "Delete HKID Card Number from record" check box.

- For deletion of the Hong Kong Birth Certificate Number, please "✓" the "Delete Birth Cert Number from record" check box instead.

d. Amendment to Class information

In addition to the First Day of Attendance, there are three types of update that may be performed by eForm D, namely Update Class Name, Transfer to Different Class Level and Transfer to Another Class.

The list of class names in the Class Name drop down list comes from the Class and Subject Details Survey eForm. If the class name in the Class and Subject Details Survey eForm has not yet been confirmed, no class name will be shown in the list. Please liaise with the officer in your school who are responsible for the Class and Subject Details Survey for using of the same class names in both the Class and Subject Details Survey and Enrolment Survey and have these class names confirmed in the Class and Subject Details Survey eForm.

i. Update Class Name

If the Class Name of a student is incorrect, you have to amend the student's Class Name by selecting Update Class Name in the "Update Item" pull-down menu. Then, you need to select the Class Level in the "Class Level" pull-down menu. Afterwards, you can select the correct Class Name in the "Class Name" pull-down menu.

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ii. Transfer to Different Class Level

If a student is being transferred to a different class level, you have to select the function "Transfer to Different Class Level" and update his/her (1) Date of Transfer, (2) Class Level together with the (3) Class Name.

iii. Transfer to Another Class

If a student is being transferred to another class (which is in the same Class Level) in the school year, you have to select the function "Transfer to Another Class" and update his/her (1) Date of Transfer, (2) Class Level together with the (3) Class Name.

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IV. Delete a record of amendment of student particulars

If you have added a new record that is not required, click **<Delete>** on the right-hand side of the record to delete it.

A confirmation message will pop up.   If you click **<Yes>**, the record will be deleted.

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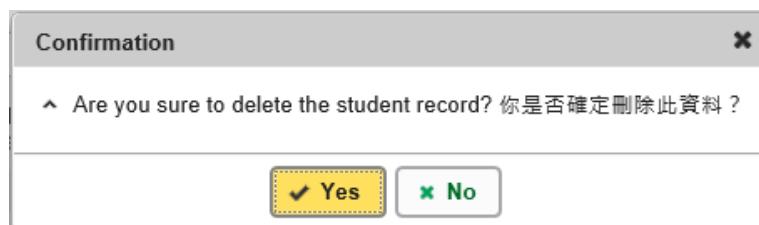
V. Save the eForm D

Please save the eForm D regularly.   To save the eForm D, click **<Save>** at the bottom of the eForm D.
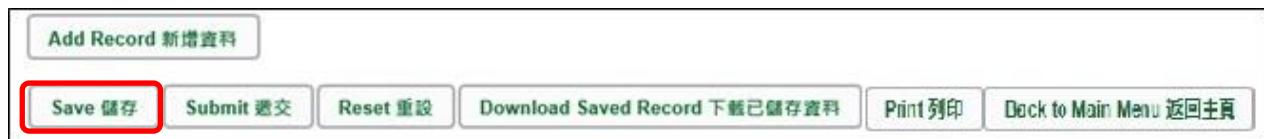
The system will pop up a message to seek user's confirmation.   Press **<Yes>** to confirm, then the amended data was saved successfully.

If there is/are any student record(s) not yet updated or confirmed, you will NOT be allowed to submit eForm D.   An error notification will be shown on the top of the screen, with reason for the failure shown below the student records concerned with invalid data in red.   Please read the reasons carefully, correct the errors and submit the eForm again.

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If the eForm is saved successfully, the message "Records updated successfully" will be shown on the top of the screen. The "Form Status" will become "Save" and the "Last Update Time" will display the time you save the eForm.
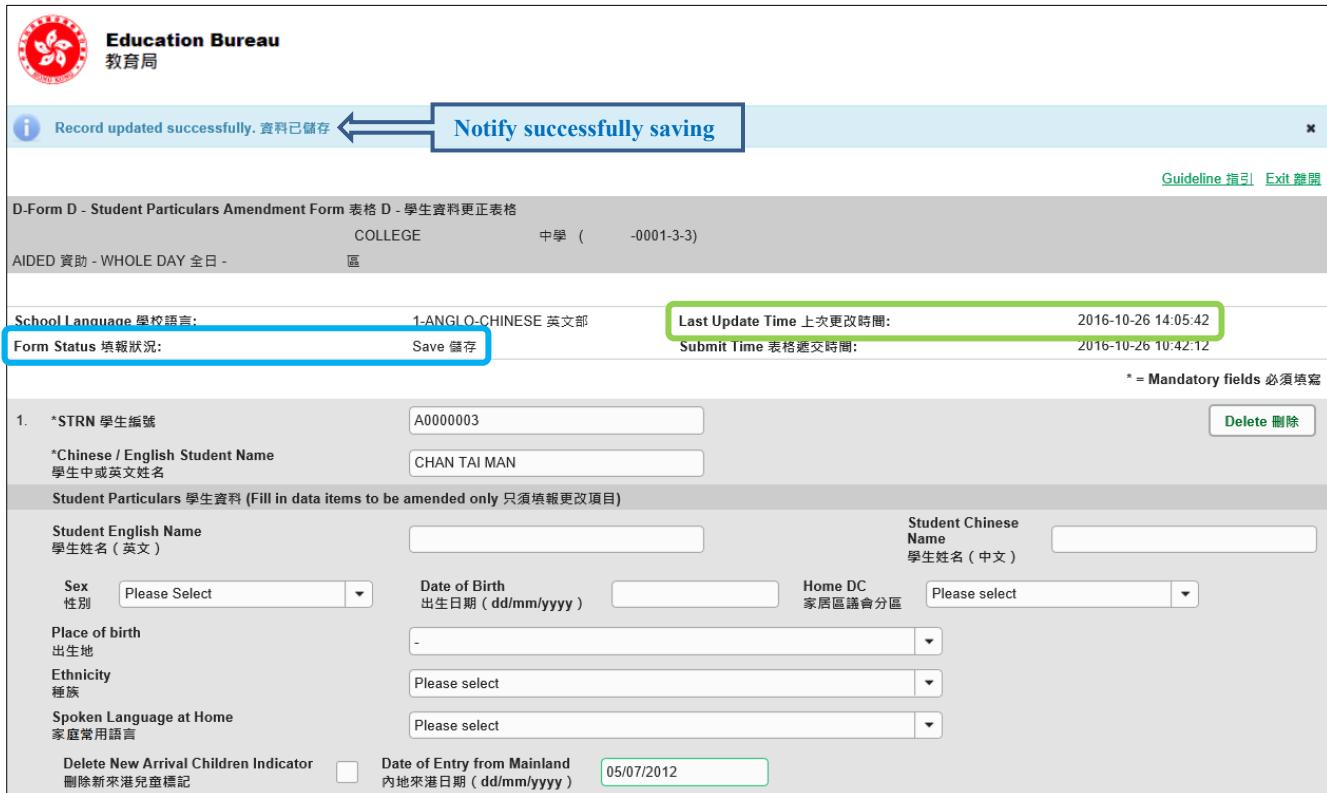
VI. Reset the eForm D

You can click <**Reset**> to reset all the information entered after the last save action.

The system will pop up a message to seek user's confirmation. **Be careful**, all information entered by users after the "Last Update Time" will be cancelled without saving to the eForm D when you press **<Yes>**.

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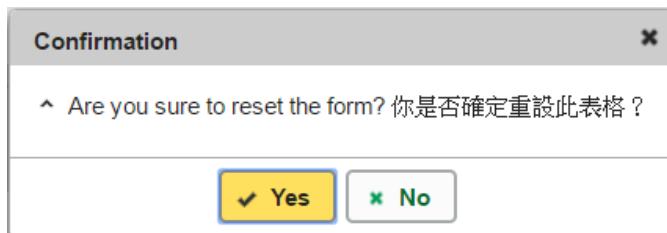
VII. Print and Download the eForm D

Before submitting eForm D, you can print hardcopy or download softcopy of the eForm D for checking and filing purpose. <u>Once the eForm is submitted, you cannot retrieve it again.</u>

a. Print hardcopy of eForm D

   To print hardcopy of the eForm D, click **<Print>** at the bottom of the eForm.

   The "printing" dialog box will pop up.   The content of the dialog box will depend on individual PC's configuration.   Please select the appropriate printer from the printer list and confirm printing.
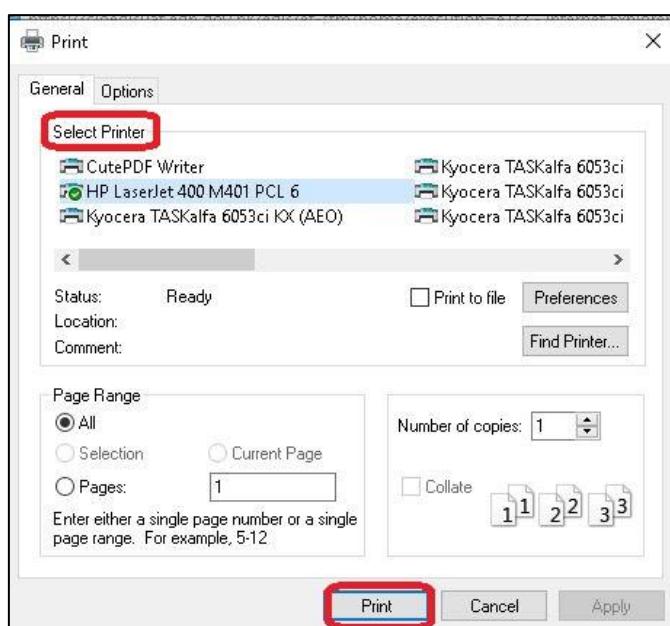
b. Download softcopy of eForm D

   To download a softcopy of the eForm D, click the **<Download Saved Record>** at the bottom of the eForm.

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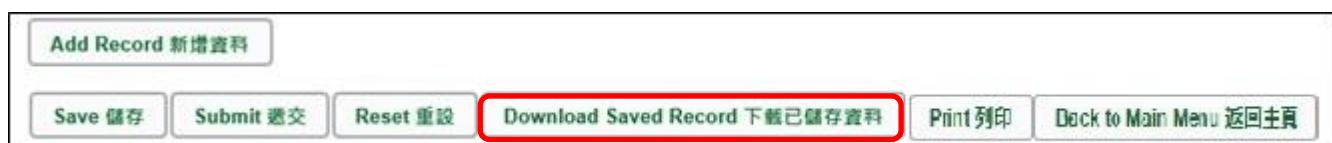
The following box will pop up. User is required to input a key with at least 8 characters which composed of the all 3 categories OR with at least 10 characters which composed of category A and either category B or C to protect the downloaded content. Click **<Continue>** after the key has been input or click **<Cancel>** to go backwards.
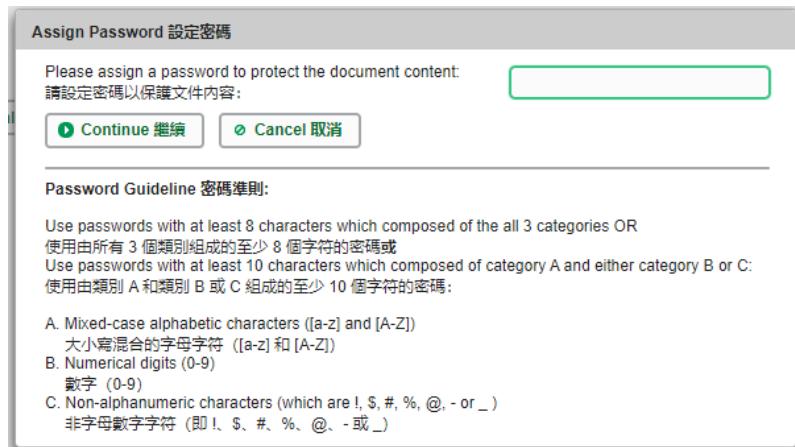

A "file download" dialog will be shown on the bottom of screen. On the right hand side of the **<Save>** button, there is a pull-down menu button. Select **<Save as>** on the pull down menu.
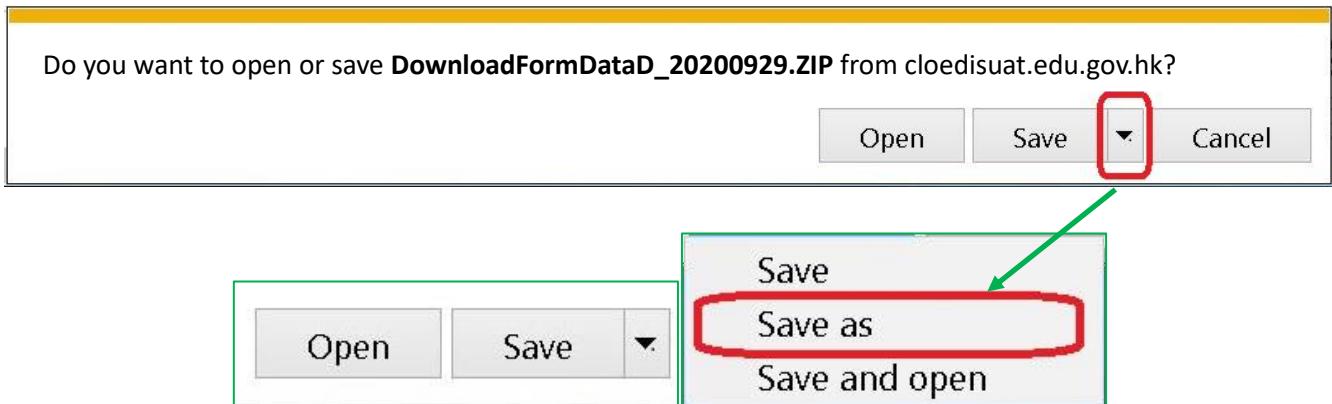
The "Save as" box will pop up. Select the file location for saving the softcopy, enter the file name and click **<Save>** to save the file.

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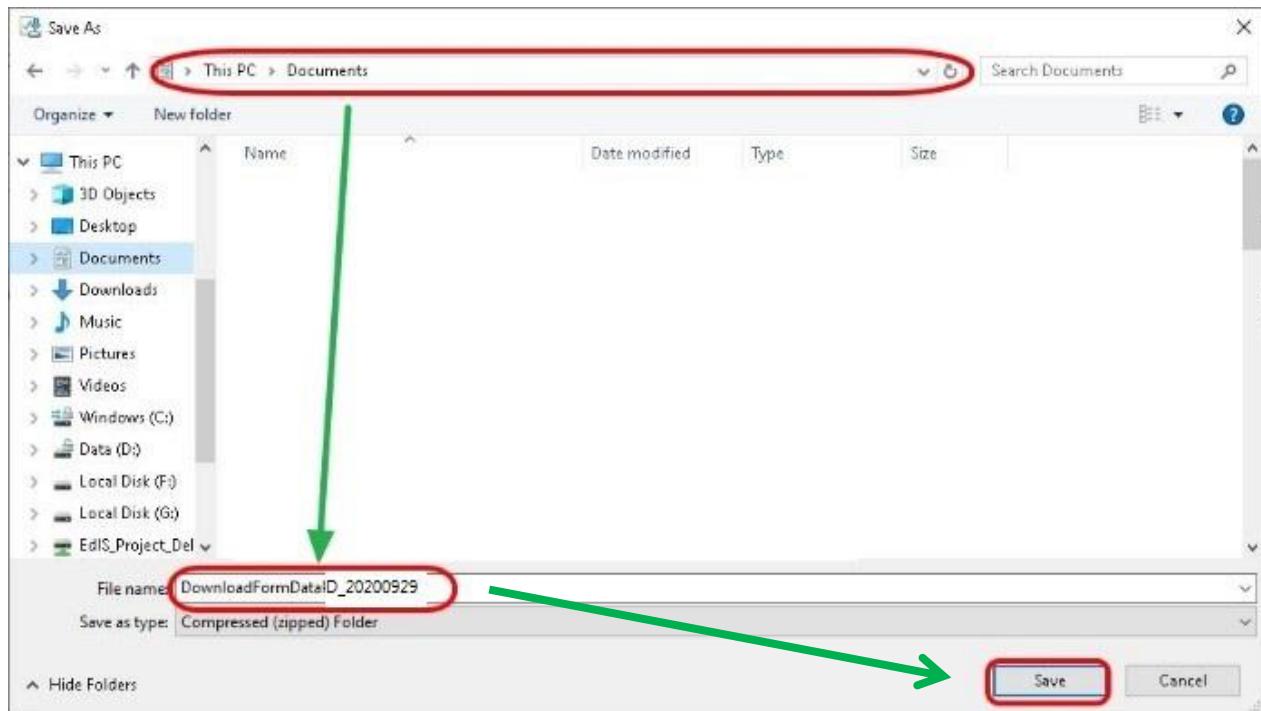
Please use the key to open the file that has been downloaded to your computer.

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VIII. Submit the eForm D

After updating the eForm D, you should make sure that all the data entered are accurate. If you are sure that the entered data is correct, you may submit the data to the EDB by clicking **<Submit>** at the bottom of the eForm.
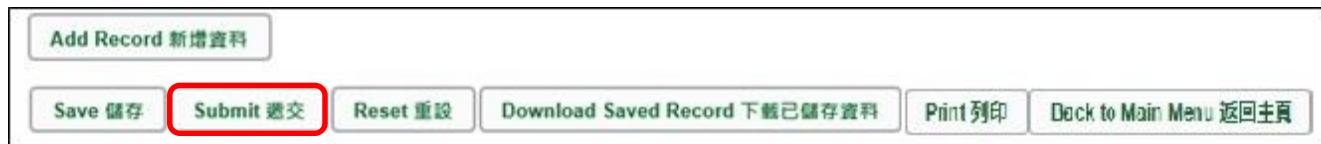
The system will pop up a message to seek user's confirmation. By clicking **<Yes>**, the eForm D will be submitted.
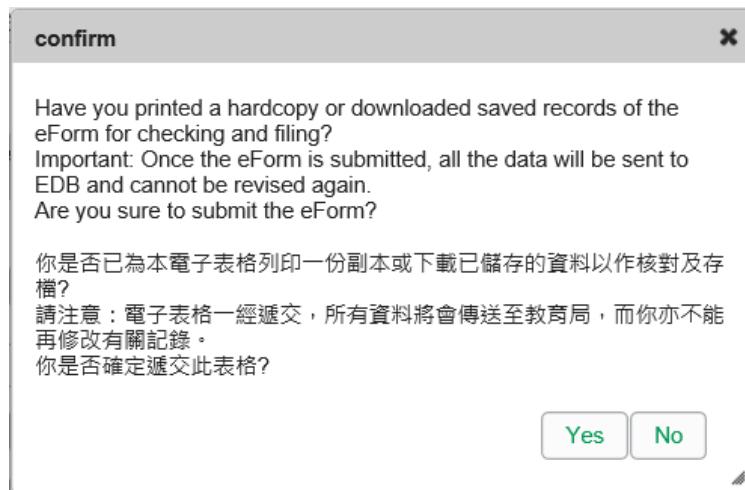
If the eForm is submitted successfully, the message "Record submitted successfully" will appear on the top of the screen. The "Form Status" will become "Submit" and the date and time you submit the eForm will be displayed.

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IX. Exit the eForm

To exit from the eForm D and go to another eForm, click **<Back to Main Menu>** at the bottom of the eForm D and select another eForm for updating.


If there is any unsaved changes, the system will remind you and request your confirmation. Press **<No>** to save updated data, or press **<yes>** to exit without saving updated data.

To return to CLO, click **<Exit>** on the top right hand corner of the eForm.

If there is any unsaved change(s), the system will remind you and request your confirmation. Press **<No>** to save updated data, or press **<yes>** to exit without saving updated of data.

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