

# **Innovation and Technology Fund for Application in Elderly and Rehabilitation Care Manual**

**March 2024**

**Social Welfare Department**

**The Government of the Hong Kong Special Administrative Region**

(Disclaimer: There are the original English version and translated Chinese version of the Innovation and Technology Fund for Application in Elderly and Rehabilitation Care Manual. In case there is any conflict or inconsistency between the English version and the Chinese translation of the Manuals, the English version shall prevail.)

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## Chapter 1

### Introduction

#### **1.1 Ambit and Approving Authority of the Innovation and Technology Fund for Application in Elderly and Rehabilitation Care**

- 1.1.1 The Chief Executive of the Hong Kong Special Administrative Region, in the 2017 Policy Address, announced the setting up of a \$1 billion Innovation and Technology Fund for Application in Elderly and Rehabilitation Care (I&T Fund) to subsidise elderly and rehabilitation service units to procure/rent or try out technology products for improving the quality of life of service users as well as reducing the burden and pressure of care staff and carers.
- 1.1.2 Grants from the I&T Fund are normally used to meet non-recurrent commitments for procurement/rental or trial use of innovative technology products. The innovative technology products in the case of procurement and rental include not only devices, equipment and tools that help enhance the effectiveness and quality of care, but also mobile applications and high-end hardware and software (e.g. systems that can effectively and accurately record the activities, health conditions and medical records, etc. of elderly persons and persons with disabilities). Applicant organisations can also apply for subsidy to trial use newly developed technology products in their elderly and rehabilitation service units.
- 1.1.3 Innovative technology products falling within the ambit of the I&T Fund should meet the following criteria: (a) should be able to facilitate rehabilitation of the elderly or disabled service users of the applicant service units; (b) should be able to prevent occurrence of risks, e.g. fall risk, abscondence risk, etc. to the elderly or disabled service users of the applicant service units; (c) should be able to reduce the caring burden and pressure of the care staff of the applicant service units; (d) should directly hook up with innovation and technology, i.e. but not materials only, not non-innovative technology

products, etc.; and (e) should be innovative technology items outside the ambit of common furniture and equipment lists of the relevant service units normally supported by the Lotteries Fund. Moreover, the hardware, infrastructure and facilities of the applicant organisations or applicant service units should be able to support their applied innovative technology products, where applicable.

1.1.4 Eligibility of applicant organisations:

- (a) All non-governmental organisations and private organisations (private organisations as specified below) currently (i.e. at the time of applications) receiving subsidies from the Social Welfare Department (SWD) and providing subsidised residential care services for the elderly, including Contract Homes, or persons with disabilities, community care and support services for the elderly, or day rehabilitation and community support services for persons with disabilities can make applications for the I&T Fund (also at the time of approval for being eligible to be approved with the fund, and at the time of grants utilisation for being eligible to be released of the grants). Eligible private organisations include (i) residential care homes for the elderly participating in the Enhanced Bought Place Scheme; (ii) residential care homes for persons with disabilities participating in the Bought Place Scheme; (iii) self-financing nursing homes participating in the Nursing Home Place Purchase Scheme; (iv) recognised service providers (RSPs) under the Community Care Service Voucher Scheme for the Elderly; and (v) RSPs under the Pilot Scheme on Residential Care Service Voucher for the Elderly.
- (b) The eligibility for subsidy for procurement and rental of I&T Fund was expanded in September 2022 to include private and self-financing residential care homes for the elderly and persons with disabilities with licenses /certificates of exemption issued by SWD or the Department of Health.

1.1.5 Eligible applicant organisation may apply for grant under the I&T Fund by individual eligible service unit, or it may make joint application on the basis of eligible cross service units of the same organisation for shared procurement, rental or trial

use of innovative technology products. In making a joint application, the applicant organisation should state in the application form the specified distribution of the amount and percentage of the applied and approved grant from the I&T Fund to be assigned to each of the service units involved in the joint application. Virement of grants among individual service units or projects of the approved applicant organisation is not allowed.

- 1.1.6 In applying for and using grants from the I&T Fund to procure, rent or trial use innovative technology products, the applicant organisations have to ensure and undertake that use of any of the products will comply with all the related and necessary statutory Ordinances, operational guidelines, rules and guidelines, codes of practice, etc. governing the operation of their services, including but not limited to the Residential Care Homes (Elderly Persons) Ordinance (Cap. 459) and regulation, Hospitals, Nursing Homes and Maternity Homes Registration Ordinance (Cap. 165), Residential Care Homes (Persons with Disabilities) Ordinance (Cap. 613) and regulation, Electrical Products (Safety) Regulation (Cap. 406G), Personal Data (Privacy) Ordinance (Cap. 486) of the laws of Hong Kong, etc. Moreover, they must undertake and ensure that the products to be in use have fulfilled all the required certifications, etc. safeguarding the health and safety of all the service users and staff members of the service units as well as the public and environment concerned.
- 1.1.7 For I&T Fund applications for procurement, rental or trial use of innovative technology products, the applicant organisations, their Board of Management, Head or staff cannot have any ownership or share of ownership of the applied products.
- 1.1.8 The applicant organisations have to effect and ensure that their insurance and compensation as well as complaint policy can cover any complaint on, loss of or damage to the applicant service units' premises and properties or injury or death of persons (e.g. staff members, service users and the public). The Government and its employees or agents will not bear any liability whatsoever for or in respect of the above.
- 1.1.9 The applicant organisations have to ensure and effect that at

their own resources they will have the required and qualified professionals (e.g. occupational therapist, physiotherapist, pharmacist) to operate and monitor the innovative technology products procured, rented or trial used, whenever and wherever necessary as so required by the use of the innovative technology products supported by the I&T Fund. The applicant organisations will also have to ensure that they will be able to absorb all recurrent financial consequences arising from the use of the I&T Fund grants.

- 1.1.10 Except for the applications for procurement or rental of innovative technology products exactly identical to those on the reference list of Recognised Technology Application Products stated in paragraph 2.3.1, the SWD will arrange technical assessments of the applications from the Expert Group [coordinated by The Hong Kong Council of Social Service (HKCSS)] for the reference of the SWD and Assessment Panel (AP) of the I&T Fund in the course of processing the applications when necessary. The AP will assess and make recommendations on the I&T Fund applications and advise on the amount of grants based on pre-determined criteria. The assessment criteria include the following areas: (a) the feasibility, sustainability and cost-effectiveness of the innovative technology products; (b) the benefits brought by the innovative technology products to service users and care staff; and (c) the experience, ability and professional knowledge of the applicant organisations and service units to use the innovative technology products, etc. Where necessary, the applicant organisation may be required to give supplementary information at the AP meeting on their applied project.
- 1.1.11 Under powers delegated from the Director of Social Welfare (DSW), Deputy Director (Services) will approve, subject to the advice of the AP of the I&T Fund, grants from the I&T Fund for procurement, rental and trial use of innovative technology products.
- 1.1.12 Subject to the amount and eligibility of applications, the bulk of the \$1 billion funding of the I&T Fund is estimated to be progressively disbursed within five years starting from 2019-20. Approval of funding is subject to the availability of the I&T Fund. In considering the requested time period of rental

or trial use of innovative technology products when tapping funding support, the applicant organisations should also take into account the possible termination of services and contracts of the applicant service units or ending of implementation of the I&T Fund, where applicable.

## **1.2 The Innovation and Technology Fund for Application in Elderly and Rehabilitation Care Manual (the Manual)**

- 1.2.1 This Manual regulates matters relating to the use of the I&T Fund and guides the applicant organisations and approved applicant organisations through the procedures of application, procurement, payment and control of the I&T Fund grants. The applicant organisations and approved applicant organisations are required to comply with these provisions relating to the I&T Fund grants.
- 1.2.2 The provisions in the Manual are prescribed by DSW who may amend, supplement, apply, interpret and make exceptions to them. There will be regular reviews and updates of the Manual. Practice and guidance notes may also be issued by the SWD from time to time to supplement the Manual.
- 1.2.3 Users of the Manual are reminded that even if they are only taking reference to this Manual on a specific type of project (e.g. procurement or rental of innovative technology items), they should familiarise themselves with the background and requirements in Chapters 1, 4 and 5 also.

## **1.3 General Reminder**

- 1.3.1 In all handling, processing or using applications or grants of the I&T Fund, all Board members, staff and members concerned of the SWD, HKCSS, AP, EG, the applicant organisations and approved applicant organisations have to be prohibited from all forms of bribery and corruption. They are prohibited from soliciting, accepting or offering any bribe in



conducting the SWD's, HKCSS's or organisations' business or affairs. In conducting all business or affairs of the SWD, HKCSS or organisations, they must comply with the Prevention of Bribery Ordinance of Hong Kong (Cap. 201).

- 1.3.2 To guard against bribery in the use of the I&T Fund, the approved applicant organisations are required to lay down stringent probity guidelines for the funded activities, covering prohibition of solicitation, acceptance and offer of advantages, acceptance of entertainment, handling of conflict of interests, use of confidential information, etc., for their Directors / members and staff (such as by drawing up a Code of Conduct). The applicant organisations and approved applicant organisations are advised to make reference to the 《Brief Description of the BPC on Procurement》, 《Sample Code of Conduct for Non-Governmental Organisations》 or 《Sample Code of Conduct for the Private Sector》 issued by the Corruption Prevention Department which encompasses all the key requirements, which is also available on the Hong Kong Independent Commission Against Corruption website:  
( 《Brief Description of the BPC on Procurement》 :  
[https://cpas.icac.hk/EN/Info/Lib\\_List?cate\\_id=3&id=199](https://cpas.icac.hk/EN/Info/Lib_List?cate_id=3&id=199)  
《 Sample Code of Conduct for Non-Governmental Organisations》 Full version:  
[http://cpas.icac.hk/EN/Info/Lib\\_List?cate\\_id=3&id=157](http://cpas.icac.hk/EN/Info/Lib_List?cate_id=3&id=157),  
《 Sample Code of Conduct for Non-Governmental Organisations》 Abridged version:  
[http://cpas.icac.hk/EN/Info/Lib\\_List?cate\\_id=3&id=155](http://cpas.icac.hk/EN/Info/Lib_List?cate_id=3&id=155)  
Brief Description of the 《Sample Code of Conduct for the Private Sector》  
[https://cpas.icac.hk/EN/Info/Lib\\_List?cate\\_id=43&id=2365](https://cpas.icac.hk/EN/Info/Lib_List?cate_id=43&id=2365)).
- 1.3.3 The applicant organisations should not enter into any financial commitment in respect of any procurement, rental or trial use of innovative technology products before the I&T Fund grants concerned have been approved with receipt of approval letters by the SWD and have returned undertaking of acceptance. The SWD and I&T Fund will not be responsible for any financial commitment so made.
- 1.3.4 Successful applicant organisations need to submit financial

statements, reports and consolidated users satisfaction surveys, etc. to the SWD at time points as required. Where required by the SWD or Audit Commission, the approved applicant organisations have to receive and facilitate surprise on-site spot checks at the approved applicant service units on the products supported by the I&T Fund and all the relevant records, including books and accounts, inventory and disposal records, etc.

## Chapter 2

### Procurement and Rental of Innovative Technology Products

#### 2.1 Preamble

- 2.1.1 Applications for the I&T Fund and the arrangement for payment of grant for procurement and rental of innovative technology products are governed by the rules and procedures outlined in this Chapter.

#### 2.2 Submission of Application

- 2.2.1 Applications for the I&T Fund under this Chapter should contain completed information and documents listed in the application form at Annex 2.1 and addressed to the Secretariat for Innovation and Technology Fund for Application in Elderly and Rehabilitation Care of the SWD at Room 502, 5/F, West Coast International Building 290-296 Un Chau Street, Sham Shui Po, Kowloon. The envelope should be clearly marked on the outside with “Application for allocation of grants from the Innovation and Technology Fund for Application in Elderly and Rehabilitation Care”. One soft copy (compact disc/USB memory stick preferably in MS WORD 03or above for Windows format) and two original hard copies of the duly completed application form for each individual I&T Fund application should be included in the application. Moreover, application for procurement of technology products should be separate from application for rental of innovative technology products.

#### 2.3 Procurement and Rental of Innovative Technology Products

- 2.3.1 The I&T Fund shall accept applications for procurement and rental of innovative technology products on the reference list of Recognised Technology Application Products. The reference list will be reviewed and updated where appropriate and necessary. The applicant organisations should therefore refer to the most updated version of the reference list

uploaded via the SWD homepage. For the innovative technology items applied for procurement or rental not on the reference list or different from the reference list, the AP of the I&T Fund will decide whether to approve the applications having regard to the circumstances of individual cases.

- 2.3.2 Applications for the I&T Fund have to satisfy the following principles: (a) the innovative technology products sought for procurement or rental should be able to benefit elderly service users or service users with disabilities of the applicant service units; (b) the use of the relevant innovative technology products must not impose extra financial burden on the service users or Government; (c) upon request of the AP, the applicant organisation is required to open its service unit for members of the social welfare sector to visit the innovative technology products procured and rented subsidised by the I&T Fund.
- 2.3.3 A ceiling is set for the total amount of grant(s) for an individual service unit for the purpose of procuring or renting innovative technology products according to the type of service units of the applicant organisations and their service capacity. The maximum grants by type of service units are listed at Annex 2.2. A single service unit may submit multiple applications, provided that the total amount of grants in all the approved applications does not exceed the ceiling applicable to the service unit.
- 2.3.4 The amount of the I&T Fund grant may cover the cost of staff training on how to use the applied technology products and the cost of warranty or maintenance of the products for a maximum of five years. Moreover, the fund will cover the relevant expenditure of the approved applicant organisation for both the subsidised and non-subsidised portions of the same service unit, where applicable. If the requested amount exceeds the grant ceiling, the applicant organisations shall undertake to bear the excessive amount by their own resources before the application will be considered.
- 2.3.5 Duplication of different Government funds to cover the same applied project is however not allowed.
- 2.3.6 Applications from organisations for common furniture and

equipment, non-technology products, non-innovative technology products or works items will not be considered. Similarly, separate applications for the I&T Fund solely for staff training, warranty or maintenance, software, system upgrading, repair and replenishment, recurrent expenses, etc. relating to the procured or rented innovative technology products funded by the I&T Fund will not be considered.

2.3.7 The applicant organisations will be informed in writing of the result of their applications. While the information of items on which the calculation of the grant is based on will be provided to the approved applicant organisations, the approved applicant organisations should procure or rent the items as specified therein within the amount of the approved grant. No supplementary grant will be given.

2.3.8 The approved applicant organisations should procure or rent the approved innovative technology products as soon as possible after receiving formal approval of the I&T Fund. Moreover, the approved applicant organisations have to write to the SWD once the approved innovative technology products are procured or rented with the date of procurement or rental.

## **2.4 Payment of Grant**

2.4.1 Payment of the I&T Fund grant for procurement of innovative technology products is normally made on a reimbursement basis.

2.4.2 The approved applicant organisations should submit the following documents to the SWD for payment claims:

(a) duly completed payment claim form (see Annex 2.3) signed by the Head of the approved applicant organisation;

(b) original plus one certified true copy of all the invoices and receipts related to the claim. The original invoices and receipts stamped with “PAID” will be returned to the approved applicant organisations when payment is arranged; and

(c) evidence of having used up the donation or contribution

received if the approved project is not fully financed by the I&T Fund.

- 2.4.3 The payment claims should be submitted to the SWD within the timeframes specified in the approval letters. The approved applicant organisations should normally complete purchase of all innovative technology products within four months after getting approval of the I&T Fund and submit payment claims within one month after completion of all purchase. For rental of innovative technology items, all payment claims should be submitted within two months after termination of rental contract or agreement. Failure to submit the payment claims within the specified timeframes would result in the unclaimed balance of the grant to be reverted to the I&T Fund.
- 2.4.4 Payment of the I&T Fund for rental of innovative technology items will be paid in arrears. The approved applicant organisations have to write to the SWD the actual date of commencement and termination of the rental period as well as the actual total amount for the rental project with a copy of the contract or agreement signed with the supplier concerned as the supporting documents for effecting disbursement of grants. Apart from that, the approved applicant organisation needs not apply for the release of the grants. The approved applicant organisation should normally start rental of all innovative technology product and inform the SWD in writing within two months after getting approval of the I&T Fund. Failure to begin the rental within the timeframe specified may result in the unclaimed balance of the grant to be reverted to the I&T Fund. In case there are any changes in terms and conditions of the rental contract or agreement (e.g. the rental period, rental amount and rental quantities, etc.), the approved applicant organisations should immediately write to inform the SWD with a copy of the latest agreement or contract.
- 2.4.5 For reimbursement, the approved applicant organisation should submit the documents listed in paragraph 2.4.2 during the rental period. For payment made on non-reimbursement basis, the financial transactions of each approved application for rental of technology product should be shown in the financial statements or audited financial statements in

accordance with the financial reporting requirement stipulated in Chapter 4 of this Manual.

- 2.4.6 Payment of the approved grants from the I&T Fund can be made direct to the approved applicant organisation's bank account if the organisation has made the necessary authorisation by completing the "Authority for Payment to a Bank" (GF179A) at Annex 2.4. Otherwise, a cheque will be issued to the organisation.
- 2.4.7 Where a project is not fully subsidised by the I&T Fund, the approved applicant organisation should use up its own contribution or donation before calling on allocation from the I&T Fund. The organisation should submit evidence to show that the contribution has been used up.
- 2.4.8 Where circumstances justify (e.g. when the project is found not up to the requisite standard or where the original receipts, certificates, contract or agreement submitted are found not acceptable), the SWD may withhold further payment or claw back grant paid to the approved applicant organisation.
- 2.4.9 Any surplus of the grant paid over the recognised total expenditure of the project will be clawed back by the SWD and reverted to the I&T Fund. But any deficit exceeding the grant will be borne by the approved applicant organisations.

## **2.5 Keeping Records of the I&T Fund Projects**

- 2.5.1 An assets register, inventory record or rented items record should be maintained by the approved applicant organisations for verification of the existence and completeness of the assets purchased or rent with the I&T Fund grants. It is the responsibility of the management of the approved applicant organisations to institute internal controls to safeguard the assets, detect fraud or irregularities, and ensure reliability of records and their compliance with relevant laws and regulations.
- 2.5.2 The books of account and all other relevant records and information related to the I&T Fund grants should be retained by the approved applicant organisation for at least seven years

after the completion of the project, release of the final payment, disbursement of the final payment installment or in accordance with the prevailing statutory requirements whichever the longer. These books and records should, at all reasonable times, be available for inspection by any authorised staff of the SWD and Audit Commission.



## Chapter 3

### Trial use of Newly Developed Technology Products

#### 3.1 Preamble

- 3.1.1 Applications for the I&T Fund for trial use of newly developed technology products in their elderly and rehabilitation service units are governed by the rules and procedures outlined in this Chapter. The procedures involved in this category are basically an application – disbursement arrangement.

#### 3.2 Submission of Application

- 3.2.1 Applications for the I&T Fund grants under this Chapter should contain completed information and documents listed in the application form at Annex 2.1(T) and addressed to the Secretariat for Innovation and Technology Fund for Application in Elderly and Rehabilitation Care of the SWD at Room 502, 5/F, West Coast International Building 290-296 Un Chau Street, Sham Shui Po, Kowloon.. The envelope should be clearly marked on the outside with “Application for allocation of grants from the Innovation and Technology Fund for Application in Elderly and Rehabilitation Care”. One soft copy (compact disc/USB memory stick preferably in MS WORD 03 or above for Windows format) and two original hard copies of the completed application form for each individual I&T Fund application should be included in the application. Moreover, applications for trial use of technology products should be separate from applications for procurement or rental of innovative technology products.

#### 3.3 Trial use of Newly Developed Technology Products

- 3.3.1 The applicant organisations may identify suitable technology research and development companies as working partners to try their newly developed technology products designed specifically for the nursing and rehabilitation needs of elderly persons or persons with disabilities. The technology products eligible for application for the I&T Fund include : (a) newly developed product well-tested and ready for deployment by applicant service units without customization; and (b) newly developed products well-tested and suitable for deployment by applicant organisations after customization within a reasonable time and cost .

- 3.3.2 Applications for approval of the I&T Fund have to satisfy the following principles: (a) the technology products sought for trial use should be able to benefit elderly service users or service users with disabilities of the applicant service units; (b) the use of relevant technology products must not impose extra financial burden on service users or the Government; (c) the applicant organisations are required to explain how the product(s) will benefit users, complete testing of the product(s) within a specific timeframe less than one year after the item is approved and continue to use the product(s) for at least two years; and (d) upon request of the AP, the approved applicant organisations are required to open their service units for members of the social welfare sector to visit the technology products for trial use subsidised by the fund.
- 3.3.3 The ceiling for the I&T Fund grant under each application for the purpose of trial use of newly developed technology products is \$5 million. Parameter on grant allocated would be considered based on different factors including the size and nature of the applicant organisation or service unit as well as type of product applied, etc. Moreover, the SWD will arrange technical assessments of the relevant applications for the AP to consider an application and determine an appropriate amount of the grant. The grant may cover the cost of staff training on how to trial use the relevant technology products, the cost of warranty or maintenance of the products trial used for a maximum of five years, and the administrative overhead expenses up to 15% of the total project cost. The amount of grant under the fund will cover the relevant expenditure of the approved applicant organisations for both the subsidised and non-subsidised portions of the same service unit, where applicable. The applicant organisations may consider using their own resources to bear part of the expenses of the applied projects but duplication of different Government funds to cover the same applied project is not allowed.
- 3.3.4 Applications from the applicant organisations for trial use of common furniture and equipment, non-technology products, non-innovative technology products or works items will not be considered. Similarly, separate applications solely for replenishment, repair or maintenance of, staff training or recurrent expenses for the technology products being trial used will normally not be considered.

- 3.3.5 The applicant organisations will be informed in writing of the result of their applications. While the information of items on which the calculation of the grant is based on will be provided to the approved applicant organisations, the organisations should trial use the items as specified. No supplementary grant will be given.
- 3.3.6 Prior to submitting I&T Fund applications for trial use of newly developed technology products, the applicant organisations should also discuss with the identified technology research and development companies on the terms and details of procurement or rental of the products upon termination of the trial use period in the case of successful and satisfactory trial use. If the approved applicant organisations intend to apply for the I&T Fund for procuring or renting the products concerned subsequent to their successful and satisfactory trial use after the expiry of the trial use period, they should refer to and follow the procedures and terms stipulated in Chapter 2 of the I&T Fund Manual governing procurement and rental of innovative technology items.
- 3.3.7 The applicant organisation has to include in the I&T Fund application the project development plan for trial use of technology product, among others, including the organisation's management plan in case the effect of the trial use is undesirable. In the event of such a case, the approved applicant organisation should at the prudent and timely decision of its Board of Management terminate the project even before the end of the trial period. The organisation should in writing inform the SWD immediately upon finalising such decision. Moreover, the undesirable effect and such decision have to be stated clearly therein and also in the report submitted to the SWD.
- 3.3.8 The approved applicant organisations should start the approved trial use project as soon as possible after receiving formal approval of the I&T Fund. Moreover, organisations have to write to the SWD once the project begins with dates concerned provided.

## **3.4 Payment of Grant**

- 3.4.1 ● The SWD will retain 5% of the total approved grants for each trial use project of which will be released after completion of the trial use project and submission of final evaluation report. The approved grant will be disbursed by instalments, on

appropriate milestones/deliverables and subject to any other conditions attached to the approval of the grant. The first instalment will be made upon the signing of the Agreement and satisfaction of other conditions prescribed by SWD. Payment of the balance of the I&T Fund grants will be contingent upon submission of progress report and satisfactory progress made in the reporting period, e.g. the project is able to meet the prescribed milestones and SWD is satisfied with the progress, etc. The approved applicant organisation has to write to the SWD the actual date of commencement and termination of the trial use period including testing and total amount of the trial use project with a copy of the contract or agreement with the working partner concerned for effecting disbursement of grants. Apart from that, the organisation needs not apply for the release of the grants. The approved applicant organisation should normally start testing of all technology product(s) and inform the SWD within three months after approval of the I&T Fund. SWD may withhold the disbursement of grants at any time for reasons including failure to begin the testing within the timeframe specified, a lack of progress of the project against the agreed milestones, etc. In case there are any changes in terms and conditions in the contract or agreement with collaborative partner concerned (e.g. the trial use period and contract sum, etc.), the approved applicant organisation should immediately write to inform the SWD with a copy of latest contract or agreement.

- 3.4.2 Financial transactions of each approved application for trial use of technology product should be shown in the financial statements or audited financial statements in accordance with the financial reporting requirement stipulated in Chapter 4 of this Manual.
- 3.4.3 Payment of the approved grants from the I&T Fund can be made direct to the approved applicant organisation's bank account if the organisation has made the necessary authorisation by completing the "Authority for Payment to a Bank" at Annex 2.4. Otherwise, a cheque will be issued to the organisation.
- 3.4.4 Where a project is not fully financed by the I&T Fund, the approved applicant organisation should use up its contribution or donation before calling on allocation from the I&T Fund. The organisation should submit evidence to show that the contribution has been used up.

- 3.4.5 Where circumstances justify (e.g. when the project is found not up to the requisite standard or prematurely terminated due to unsatisfactory effect, or where the certificates, contract or agreement submitted are found not acceptable), the SWD would withhold any further payment and claw back grant paid to the approved applicant organisation.
- 3.4.6 Any unspent balance of the I&T Fund grant should be kept at all times in a separate interest-bearing Hong Kong Dollar account with a bank licensed in Hong Kong. Any surplus (including interest) of the grant paid over the recognised total expenditure of the project will be clawed back by the SWD and reverted to the I&T Fund. But any deficit exceeding the grant will be borne by the approved applicant organisations.

### **3.5 Keeping Records of the I&T Fund Projects**

- 3.5.1 The books of account and all other relevant records and information related to the I&T Fund grants should be retained by the approved applicant organisation for at least seven years after the completion of the project, release of the final payment, disbursement of the final payment installment or in accordance with the prevailing statutory requirements whichever the longer. These books and records should, at all reasonable times, be available for inspection by any authorised staff of the SWD and Audit Commission.

## Chapter 4

### Financial Reporting Requirement

#### 4.1 Preamble

- 4.1.1 All approved applicant organisations are required to submit statement of income and expenditure (financial statement) relating to approved rental projects and trial use projects under the I&T Fund to the SWD in accordance with the requirements set out in ensuing paragraphs. For avoidance of doubt, these financial reporting requirements are not applicable to approved projects for procurement of innovative technology products.

#### 4.2 Aggregate Amount Not Exceeding \$200,000

- 4.2.1 For aggregate amount of all approved rental projects paid on non-reimbursement basis and trial use projects under an applicant organisation (including those approved under joint applications) not exceeding \$200,000, the approved applicant organisation is required to submit financial statements certified by its Head or the Board Chairman annually within 6 months after the year ended 31 March, and a financial statement within 4 months after the completion of all rental projects and trial use projects. A sample financial statement is at Annex 4.1.
- 4.2.2 Failure to submit the financial statement within the submission deadline may render the SWD to withhold further payments, if any, and demand the refund of grants paid to the approved applicant organisation under the I&T Fund if there is reasonable doubt on compliance with the I&T Fund Manual by the approved applicant organisation.
- 4.2.3 The books of accounts and all other relevant records and information related to the I&T Fund grants should, at all reasonable times, be available for inspection by any authorised staff of the SWD and Audit Commission.
- 4.2.4 The SWD may request the approved applicant organisation to submit audited financial statements in case material deviation is found during inspection or when the SWD considers necessary.

### 4.3 Aggregate Amount Exceeding \$200,000

- 4.3.1 For aggregate amount of all approved rental projects paid on non-reimbursement basis and trial use projects under an approved applicant organisation (including those approved under joint applications) exceeding \$200,000, the approved applicant organisation is required to submit audited financial statements annually within 6 months after the year ended 31 March, and an audited financial statement within 4 months after the completion of all rental projects and trial use projects.
- 4.3.2 The approved applicant organisation is required to commission an independent audit of the financial statement (sample at Annex 4.1) to be carried out by an external auditor. The auditor must be a certified public accountant whose name appears on the gazette list of Certified Public Accountants. The approved applicant organisation should agree with the auditor on the terms of the audit engagement and the agreed terms shall be recorded in an engagement letter. The engagement shall be an audit engagement and the auditor shall, among other things, express and opine, on (a) whether the financial statements have been properly prepared from the books of accounts and in accordance with the requirements of the SWD in all material respects; (b) whether all incomes of the projects have been received and expenditures of the projects been fully settled; and (c) whether the grants have been used exclusively for the purposes and items as specified in the budget of the approved applications. The auditor's report should be submitted together with the audited financial statement.
- 4.3.3 Failure to submit the audited financial statement within the submission deadline may render the SWD to withhold further payments, if any, and demand the refund of grants paid to the approved applicant organisation under the I&T Fund if there is reasonable doubt on compliance to the I&T Fund Manual by the approved applicant organisation.

## Chapter 5

### Procurement and Stores Management

#### 5.1 Preamble

5.1.1 The procurement, rental and trial use of innovative technology products supported by the I&T Fund as well as management of those stores procured should follow procedures set out in this Chapter, wherever applicable. The approved applicant organisations, at the time of incurring the expenditures, should exercise due diligence to ensure no over-commitment in spending and expenditure items being limited to those having obtained prior approval.

5.1.2 The procurement procedures are designed to achieve the following objectives –

(a) Public accountability and value for money

The I&T Fund is public money. The applicant organisations are accountable to the public for the use of the grants allocated from the I&T Fund and should always be prepared to account for their procuring decisions, which should be properly justified and documented. The applicant organisations and approved applicant organisations are obliged to achieve the best value for money for their procurement, rental and trial use of innovative technology products and exercise prudence in disbursement of the I&T Fund.

(b) Transparency and open and fair competition

The applicant organisations and approved applicant organisations need to serve with integrity and in a publicly accountable and transparent manner. The applicant organisations and approved applicant organisations should observe due diligence and avoid conflicts of interest even in the most pressing-circumstances. All requirements, specifications and certifications of the intended procurement, rental and trial use should be drawn up in an objective manner, clear and made known to all the possible suppliers and contractors. It is necessary to uphold principle of open and fair competition and level playing field in all procurement, rental and trial use involving funding support from the I&T Fund. All potential bidders should be treated, and are seen to be treated, on equal footing.



5.1.3 As part of good corporate governance, individual applicant organisation and approved applicant organisation is responsible for the setting up and monitoring of its own procurement and stores management system with adequate checks and control and in accordance with the principles mentioned in paragraph 5.1.2 above. The procedures below provide a framework for the applicant organisations and approved applicant organisations to follow when establishing their own systems, in which these requirements have to be built in for procuring procedures concerning usage of the I&T Fund grants.

## 5.2 Quotation and Tender Value

5.2.1 Except as provided in paragraphs 5.3.3 below, the quotation and tender value are as follows –

	<b>Purchase value per case</b>	<b>Quotation or tender requirement</b>
(a)	Not exceeding \$50,000 <i>(Verbal or written quotations should be invited.)</i>	More than one supplier should be invited for quotations.
(b)	Over \$50,000 but not exceeding \$1,400,000 <i>(Written quotations should be invited.)</i>	No less than five suppliers should be invited for quotations.
(c)	Over \$1,400,000 <i>(Written tenders should be invited.)</i>	Tender procedures should be followed.

5.2.2 The approved applicant organisations should note that for all purchases irrespective of value, appropriate approving authority should be sought and all decisions should be properly documented and recorded. For proper control, approving authority for purchases should be delegated to appropriate rank of staff.

5.2.3 The approved applicant organisations should note that for purchase value over \$50,000 but not exceeding \$1,400,000 per case, in cases where (a) less than five suppliers are invited; (b) less than five written

quotations are received; or (c) a higher conforming offer or not the highest overall scorer is to be accepted, prior approval from the relevant Board should be sought.

- 5.2.4 The approved applicant organisations should normally adopt open tendering for invitation of tenders. All interested bidders are free to submit their tenders. Under special circumstances and where approval from the Board of Management (the Board) or the tender board has been obtained, the approved applicant organisations may invite tenders in an alternative ways, such as restricted tendering.
- 5.2.5 For adoption of marking scheme, the approved applicant organisations should make reference to the followings –
- (a) The approved applicant organisations should state in the quotation or tender documents the use of marking scheme in quotation or tender evaluation with an outline of the evaluation criteria. In line with procurement principle of transparency, the approved applicant organisations should provide as much information as possible (including descriptions of assessment criteria and their individual technical marks, individual and / or overall passing marks set for technical assessment, formula to be used to calculate the technical or price scores, the technical to price assessment weighting, etc.) in the quotation or tender documents to facilitate suppliers' preparation of competitive and quality quotation or tender submission.
  - (b) The adoption of marking scheme, the assessment criteria or basis and the price to non-price ratio should be approved by the Head of the approved applicant organisation or the approved applicant organisation's Board of Management with full justifications and decisions documented.
  - (c) Appropriate weighting on technical or quality and price should be set.
  - (d) Irrespective of value, quotation or tender exercises with the use of marking schemes should adopt the two-envelope approach for quotation or tender evaluation.
  - (e) Price proposal must be properly kept and opened only after the completion of the technical assessment.

### 5.3 Procurement Authority and its Delegation

- 5.3.1 The composition of the Board, the tender board and the quotation board (if applicable) with appropriate rank and number of members and chairperson should be properly documented.
- 5.3.2 The Board of the applicant organisation or approved applicant organisation may in writing delegate authority to individual staff member at appropriate levels or quotation or tender boards each composing of not less than three persons including at least one senior staff member to conduct procurement and to approve inviting the appropriate number of quotations or tenders specified in paragraph 5.2.1 and accepting the lowest conforming quotation or the highest overall scorer.
- 5.3.3 Subject to paragraph 5.3.4 below, the Board may itself approve inviting or accepting quotations or tenders from less than the number of requirements specified in paragraphs 5.2.1, 5.2.3 and 5.2.4, or not accepting the lowest conforming offer or the highest overall scorer (for procurement with a value over \$50,000 but not exceeding \$1,400,000). The Board may also in writing delegate authority to individual staff members of appropriate level or quotation boards to approve inviting or accepting quotations from less than the specified number of bidders, or not accepting the lowest conforming quotation or the highest overall scorer for procurement with a value over \$50,000 but not exceeding \$700,000 in accordance with a set of conditions and procedures to be prescribed by the approved applicant organisation.
- 5.3.4 The justifications for the exercise of the exceptional authority by the Board or others must be properly documented on each occasion. For example, for patented items distributed through a sole agent, justification should be provided as to why the particular brand is required. Documentary proof from the supplier that it is the sole agent of the goods should also be provided.
- 5.3.5 The approved applicant organisations should prepare specifications of stores or services in easily comprehensive general terms, based on the functional and performance requirements of the stores or services required, and not around the technical data of a certain model of the goods or equipment to be purchased.
- 5.3.6 The applicant organisations will be informed in writing the result of their applications. They are required to comply with the terms of the approval letters and to ensure that the grants are spent in accordance with the

approved scopes and standards of the projects.

- 5.3.7 In the exercise or delegation of the procurement authority, the Board should ensure that –
- (a) the staff members or the quotation or tender boards responsible for procurement matters interpret the tender or quotation limits strictly and that they do not evade the limits by dividing procurement requirements into instalments or by reducing the usual duration of contracts;
  - (b) the reasons for inviting particular contractors or suppliers for quotations or tenders should be properly documented; and
  - (c) for procurement conducted by individual staff members, the staff member who approve the invitation to the suppliers or contractors for obtaining quotations should not be the same person who authorise the acceptance of the offer for the procurement, rental or trial use, as far as circumstances permit.

#### **5.4 Procurement, Rental and Trial Use of Innovative Technology Products**

- 5.4.1 When preparing applications for purchase or rental of innovative technology products and / or making decisions on purchase or rental of innovative technology products, reference should also be drawn to the latest reference list of Recognised Technology Application Products released by the SWD and “Reference Furniture and Equipment Lists” for the SWD subvented services, where relevant. The innovative technology products requested for support from the I&T Fund should not be those included in the respective Reference Furniture and Equipment List of the applicant service unit(s). The aforementioned lists are uploaded via the SWD homepage. The details and amount for procuring, renting or trial use of the requested innovative technology product should be supported by at least one quotation which the applicant organisation considers to be value for money. More than one quotation should be provided upon the SWD’s request.
- 5.4.2 The applicant organisations and approved applicant organisations are reminded to have their own corporate governance on information technology security policies, standards, guidelines and procedures. Adequate security measures should also be in place to protect the restricted data to be stored in information technology equipment and transmitted in the wired and wireless network.

- 5.4.3 The following general principles should be observed in purchase, rental and trial use of technology products –
- (a) the technology products to be purchased, rented or trial used should be for providing services recognised by the SWD and satisfying operational need. The purchase, rental or trial use should not adversely affect the quality of services of existing service units;
  - (b) the technology products purchased, rented or trial used with funding support from the I&T Fund should not be used to incur incomes to the approved applicant organisations, and its associated companies and companies associated with its Directors / staff;
  - (c) no excessive or extravagant items should be purchased or rented. The approved applicant organisations should ensure that the technology products to be purchased or rented are value for money and be prudent in using the I&T Fund; and
  - (d) due consideration should be given to legislative requirements, occupational health and safety, and environmental friendliness.

## **5.5 Procurement Procedures**

- 5.5.1 The approved applicant organisations should ensure that the successful bidders are technically competent and financially capable of providing the services or supplying the goods throughout the project and warranty or maintenance periods.
- 5.5.2 The applicant organisations should ensure that all procurements using the I&T Fund grants should be within the ambit of the respective grants and within the scope set out in the details of individual approval letters. These details should be adequately reflected in the quotation or tender documents.
- 5.5.3 All procurements should be conducted promptly or timely upon approval of the I&T Fund. Any additional cost due to inflation attributable to the delay of the approved applicant organisations in conducting the quotation or tender exercise will be the organisations' responsibility.
- 5.5.4 The applicant organisations and approved applicant organisations should also follow, as far as practicable, the good practice set out in the Best Practice Module(s) for Subvented Social Welfare Non-Governmental Organisations issued by the Hong Kong Independent Commission Against Corruption from time to time. The Module is posted on the SWD Homepage.

- 5.5.5 The approved applicant organisations should declare their compliance with the procurement principles and / or procedures as laid down in this Chapter when submitting payment claims on purchase or rental of approved innovative technology products and when informing the SWD the commencement details of rental or trial use of approved innovative technology products for grants disbursement purpose.

## 5.6 Conflict of Interest

- 5.6.1 A conflict of interest is a situation in which the interest of the applicant organisation or approved applicant organisation competes or is in conflict with the financial or personal interests of a Management Board or staff member, or their family members or close personal friends. A conflict of interest may be actual, potential or perceived. All levels of Head / staff / members of the applicant organisations and approved applicant organisations have to avoid conflict of interest in procurement as stated in Annex 5.1.
- 5.6.2 Before consideration of the SWD and AP or subsequent to approval of any I&T Fund applications, the applicant organisation and approved applicant organisation, its Director, members and relevant staff have to avoid, and declare whether or not they have, any conflict of interest on a standard declaration form at Annex 5.2 or Annex 5.3, where relevant. The applicant organisations and approved applicant organisations are required to remove all kinds of conflicts by using alternatives with all reasonable steps.
- 5.6.3 The approved applicant organisations should remind and require Management Board or staff members involved in the procurement process to avoid any conflict of interest. If this is unavoidable, the Management Board or staff members concerned should make the relevant declaration for a management decision as to whether they should abstain from the procurement exercise.
- 5.6.4 The applicant organisations and approved applicant organisations should set up their own system for the declaration of interest which should include the essentials detailed in the Best Practice Module mentioned in paragraph 5.5.4 above.

## **5.7 Receipt and Payment of Stores, Fixed Assets and Goods**

- 5.7.1 Upon receipt of the stores, fixed assets or goods, the officer responsible should ensure that inspection (and testing where appropriate) will be conducted as soon as possible. Discount for prompt payment should be taken into consideration in the settlement of the bills.

## **5.8 Records, Stock Taking and Verification**

- 5.8.1 The approved applicant organisations should distinguish the goods procured into inventory and non–inventory items as appropriate.
- 5.8.2 Each inventory item procured using the I&T Fund grants should be labeled with an assigned serial number and recorded in the inventory record or assets register within a reasonable period after procurement as stipulated by the management.
- 5.8.3 An inventory record should be kept for each service unit and should contain the following information –
- (a) description of the items;
  - (b) the assigned serial numbers;
  - (c) physical locations;
  - (d) date of acquisitions;
  - (e) cost of acquisitions and source of fund to acquire the assets; and
  - (f) dates, reasons and authorisation for scrap or disposal. Reference to file and document records should be entered where appropriate.
- 5.8.4 Routine physical checking of inventory items should be conducted at least once a year. The results and records of the checking should be retained properly. Any discrepancies found should be investigated and reported to the management.
- 5.8.5 While the routine checking of inventory items may be done by the service units' staff themselves, the approved applicant organisations' headquarters management should undertake random, surprise and supervisory physical checking to ensure the completeness and accuracy of the record.

## 5.9 Disposal of the Assets

- 5.9.1 An asset procured using the I&T Fund grant may only be disposed of if it is unserviceable or if it is a surplus item. The procedures outlined in paragraphs 5.9.2 to 5.9.5 below should be followed for the disposal.
- 5.9.2 In general, the innovative technology items (except the consumable parts) purchased within five years are regarded as serviceable. Assets may become unserviceable if they are damaged, broken or beyond economic repair. The applicant organisations' Board of Management may in writing delegate the authority to management staff at an appropriate level or a Board of Condemnation (particularly for high value items) to accept an item as unserviceable and may be disposed of after inspection. Wherever applicable, a technical certification certifying that the item is no longer serviceable and is beyond economic repair should normally be available before the item may be classified as unserviceable (particularly when the item is to be used as trade-in item for the purchase of new store).
- 5.9.3 The Board of Management should delegate to management staff at an appropriate level or a Board to accept a serviceable item as surplus to the approved applicant organisation and may be disposed of. The officers concerned or the Board should satisfy themselves with the reasons of classifying the item as surplus.
- 5.9.4 Unserviceable or surplus items may be disposed of in the following ways in descending order of priority –
- (a) to be re-allocated to other SWD subvented elderly or rehabilitation service units of the approved applicant organisation for use;
  - (b) to be re-allocated to other SWD subsidised elderly or rehabilitation service units of the approved applicant organisation for use;
  - (c) to be re-allocated to other SWD subvented service units of the approved applicant organisation for use;
  - (d) to be re-allocated to other SWD subsidised service units of the approved applicant organisation for use;
  - (e) to be used as trade-in items for the purchase of new stores;
  - (f) to be re-allocated to other non-subvented service units of the applicant organisation or to other charitable organisations;
  - (g) to be sold by auction or tender if the saleable value is estimated to exceed the administrative cost involved and the net proceeds should be credited to the I&T Fund;
  - (h) to be recycled by e-waste disposal licence holders if applicable; or



(i) to be dumped.

5.9.5 Disposal of unserviceable or surplus items should be properly recorded in the inventory record.

5.9.6 For Contract Homes, the approved applicant organisations (i.e. the operators) shall deliver free of any charge to the Government or the Government's nominee(s) at the expiry or early termination of the contract, all innovative technology products purchased with the I&T Fund grants in good repair and serviceable condition (fair wear and tear excepted).

Please download latest version of application forms from the I&T Fund website.  
請於樂齡及康復創科應用基金網頁下載申請表格最新版本

樂齡及康復創科應用基金申請表格  
(購置/租借科技產品)  
Innovation and Technology Fund for Application in Elderly and Rehabilitation Care  
Application Form  
(Procurement/ Rental of Technology Product)

在填寫此份表格前，請仔細參閱附錄 4 及 6 的指引及樂齡及康復創科應用基金手冊。  
Please study the Guidance Notes at Appendix 4 & 6 and the Innovation and Technology Fund for Application in Elderly and Rehabilitation Care Manual carefully before you complete the form.

一般資料表  
General Information Sheet

1. 申請撥款的服務機構和單位簡介  
Brief description of the applicant organisation and service unit

營辦機構：(中)

Operating agency: (English)

(須同時以中文和英文填寫)

should be completed in both English and Chinese)

---

通訊地址：(中)

Correspondence address: (English)

(須同時以中文和英文填寫)

should be completed in both English and Chinese)

---

電話號碼 Telephone number:

---

傳真號碼 Fax number & 電郵地址 E-mail address:

---

牌照編號 License number:

---

負責員工 Responsible staff:

---

現正接受社會福利津貼

Currently receiving subsidies from SWD:

---

機構性質  
Nature of organisation

請按一下這裡選擇一項。Please Click here to select 1 item ONLY.

- 現正受社會福利署津貼的非政府機構  
Non-governmental organisation currently receiving subvention from the Social Welfare Department
- 現正受社會福利署資助的私營機構  
Private organisation currently receiving subsidies from the Social Welfare Department

申請性質  
Type of application

請按一下這裡選擇一項。Please Click here to select 1 item ONLY.

- 個別服務單位申請  
Application from individual service unit
- 同一機構跨服務單位申請  
Joint application for cross service units of the same organisation

服務單位類別<sup>1</sup>  
Type of service unit(s)

請按一下這裡選擇一項。Please Click here to select 1 item ONLY.

- 安老服務  
Elderly Services
- 康復服務  
Rehabilitation Services

註<sup>1</sup>：每份申請表格只可涵蓋一種服務單位類別。  
Note<sup>1</sup>: Each application should only cover one type of Service Unit.

2. 其他基金或捐助  
Other funding or donation

無：是項申請科技產品並無其他基金／捐款資助。

No: There is not any other funding/donation received on the same applied innovative technology product.

有：是項申請科技產品獲其他基金／捐款資助。

Yes: There is other funding/donation received on the same applied innovative technology product.

基金／捐款名稱：

Name of funding/donation:

基金／捐款性質：

Nature of funding/donation:

基金／捐款款項金額：

Amount of funding/donation:

政府 Government    非政府 Non-government

港幣 HK\$

**聲明**

**Declaration**

本人代表 \_\_\_\_\_ (申請機構名稱)，並獲其正式授權，作出以下聲明：

I, on behalf of and duly authorised by \_\_\_\_\_ (Name of the applicant organization), declare that

(A) 本申請表格內的資料及夾附於申請表格的資料，均屬真實無誤，並反映截至提交申請當日的真實情況。本人承諾，如上述資料日後如有任何更改(特別是在本申請提交後，獲批予的社會福利署的資助有所改動)，會立即通知社會福利署。如填報資料不確，申請將被視為無效，同時，社會福利署將取消已批准的撥款，而已支付的款項亦須全數退還《樂齡及康復創科應用基金》。蓄意虛報資料或隱瞞任何重要資料者有可能被轉介到執法機關處理；

all factual information provided in this Application Form as well as the accompanying information are true and accurate and reflect the status of affairs as at the date of submission. I undertake to inform the Social Welfare Department immediately if there are any subsequent changes to the above information (in particular, subsequent change in subsidy from the Social Welfare Department after this application is submitted). Any inaccurate information will make the application invalid such that any grant approved will be withheld and payment made must be refunded in full to the “Innovation and Technology Fund for Application in Elderly and Rehabilitation Care”. Making false declarations or withholding material information may result in referral to law enforcement authorities.

(B) 如申請獲得批准，承諾會竭盡所能，按照本申請的批准項目完成計劃，並監察其過程；  
utmost dedication and determination will be given to complete and monitor the funded project according to the approved terms of this application if the application is approved;

(C) 申請機構已通知本申請有關的所有人士／機構，政府可使用本申請表格內的個人資料以審批本申請、履行法定職責、進行有關研究及調查、監察和檢討本申請的處理及整理統計數字；  
the applicant organisation has informed all individuals / parties concerned in this application of the Government’s right to the use of their personal data contained in this application form to process this application, discharge statutory duties, conduct research or surveys, monitor and review the handling of this application and prepare statistics;

(D) 本人在填寫此份表格時已經仔細參閱表格內附錄 4 的指引及《樂齡及康復創科應用基金手冊》。同時，亦已附上所有需要的有關文件以供審閱；

I have read the Guidance Notes at Appendix 4 and the “Innovation and Technology Fund for Application in Elderly and Rehabilitation Care Manual” carefully before completing this form and have also enclosed all the supporting documents required;

(E) 申請機構、其管理委員會、首長或職員於是項申請科技產品並無任何擁有權或成份。

the applicant organisation, its Board of Management, Head or staff does not have any ownership or share of ownership of the applied innovative technology product.

只需在印文本蓋上印章及簽署  
Chop and signature required for  
**hardcopy ONLY.**

機構印章 : \_\_\_\_\_  
Organisation chop

機構首長簽署 : \_\_\_\_\_  
Signature of agency head

(簽署) (Signature)

機構首長姓名 (中) : \_\_\_\_\_  
Name of agency head (English)

機構首長職位名稱 (中) : \_\_\_\_\_  
Post title of agency head (English)

電話號碼 : \_\_\_\_\_  
Telephone No.

日期 : \_\_\_\_\_  
Date

(須同時以中文和英文填寫  
should be completed in both  
English and Chinese)

購置科技產品

申請樂齡及康復創科應用基金撥款詳情(見註<sup>1,2</sup>)

Details of Application for

Innovation and Technology Fund for Application in Elderly and Rehabilitation Care Grant for  
Procurement of Innovative Technology Product (see Note<sup>1,2</sup>)

註<sup>1</sup>：請提供至少一份報價單及產品單張，內容包括價格細項、規格、證書和所需專業人員。

Note<sup>1</sup>: Please provide at least one quotation and the product catalog with details including price details, specifications, certification and required operating professional.

註<sup>2</sup>：每份申請只可涵蓋一個產品或計劃。

Note<sup>2</sup>: Each application should only cover one product or project.

是否認可科技應用產品參考清單的產品? Procurement of product on the reference list of Recognised Technology Application Products? (Y/N)						
認可科技應用產品參考清單的項目編號(例如 1.1、 1.2) Item number from the reference list of Recognised Technology Application Products (e.g, 1.1, 1.2)						
產品名稱 (須與報價單一致) Product name (identical to quotation) (須同時以中文和英文填寫 should be completed in both English and Chinese)		(中) (English 英)				
產品品牌 (須與報價單一致) Brand name (identical to quotation)						
產品型號 (須與報價單一致) Model No. (identical to quotation)						
產品規格 Specification (請參考清單參考細節) (Please refer to reference specification in reference list of Recognised Technology Application Products)						
證書 (如有，請註明) Certification (If any, please state)						
編號 No.	服務單位 (須同時以中文和英文填寫 Service unit should be completed in both English and Chinese)	服務單位類別 (見附錄 5) Type of Service Unit (see Appendix 5)				
1		選擇一個分類。Choose one Category.				
2		選擇一個分類。Choose one Category.				
3		選擇一個分類。Choose one Category.				
4		選擇一個分類。Choose one Category.				
5		選擇一個分類。Choose one Category.				
Service unit number 服務單位編號		1	2	3	4	5
以下資料須與報價單一致： The information below should be identical to quotation:						
產品數量 Quantity of product						
單價(元) (折扣後) Unit rate (\$) (after discount)						
款額(元) (數量 × 單價) Amount (\$) (Quantity × unit rate)						

保養費用總數(元) Maintenance fee (total) (\$)					
保養時期(年) (不包括隨產品附送的保養年期) Period of maintenance requested (year) (exclude the free maintenance period provided)					
保養內容(例如上門維修、人工，配件等): Maintenance coverage (e.g. onsite maintenance, labour and parts etc.)					
員工使用科技產品訓練費用(元) Staff training fee for using the technological product (\$)					
雜項費用(元) Miscellaneous expense (\$)					
總款額(元) (包括產品購置及所有有關費用) Total amount (\$) (including product procurement and all related fees)					
總款額(元) (包括所有服務單位) Total amount (\$) (including all service units)					
預計產品可使用年期 (年) Expected sustainability of product (year)					
是否需要專業人員操作該產品? Professional required to operate the product? (Y/N)					
所需專業人員的類別 Type of professional required					
申請服務單位有所需操作產品的專業人員? Professional available on site to operate the product (Y/N)					
如有任何申請服務單位並無所需操作產品的專業人員，有何應對方案? Alternatives when a service unit does not have professional to use the product as required?					
產品受眾和數目 Type and number of beneficiaries	<input type="checkbox"/> 長者(年齡 60 歲或以上) Elderly (aged 60 or above) _____人 persons  <input type="checkbox"/> 殘疾人士 Persons with disabilities 殘疾類別 Type of disability : _____ _____人 persons  <input type="checkbox"/> 護理人員 Care staff _____人 persons (請在適當的方格內加上「✓」號。) (Please“✓”where appropriate.)				
理據 (請詳述產品對受眾帶來的益處。如申報項目包含多個組件/服務項目，則每個組件/服務項目必須提供相應的申請理據。) Justification (Please elaborate how the product could benefit the beneficiaries. If the application includes multiple components/ service items, justification should be provided for each of them.)					

<p>請說明申請機構如何有經驗、能力和專業知識使用有關產品，以及供應商所提供的產品訓練詳情</p> <p>Elaboration on the applicant organization's experience, ability and professional knowledge in using the applied product, and details on training by the vendor</p>	
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租借科技產品

申請樂齡及康復創科應用基金撥款詳情(見註<sup>1,2</sup>)

Details of Application for

Innovation and Technology Fund for Application in Elderly and Rehabilitation Care Grant for  
**Rental of Innovative Technology Product** (see Note<sup>1,2</sup>)

註<sup>1</sup>：請提供至少一份報價單及產品單張包括價格細項、規格、證書和所需專業人員，支持你所申請的款額。

Note<sup>1</sup>: Please provide at least one **quotation and the product catalog** with details including price details, specifications, certification and required operating professional in support of your requested amount.

註<sup>2</sup>：每份申請只可涵蓋一個產品或計劃。

Note<sup>2</sup>: Each application should only cover one product or project.

是否「認可科技應用產品」參考清單的產品? Procurement of product on the reference list of Recognised Technology Application Products? (Y/N)						
認可科技應用產品參考清單的項目編號(例如 1.1、 1.2) Item number from the reference list of Recognised Technology Application Products (e.g, 1.1, 1.2)						
產品名稱 (須與報價單一致) Product name (identical to quotation) (須同時以中文和英文填寫 should be completed in both English and Chinese)		(中) (English 英)				
產品品牌 (須與報價單一致) Brand name (identical to quotation)						
產品型號 (須與報價單一致) Model No. (identical to quotation)						
產品規格 Specification (請參考清單參考細節) (Please refer to reference specification in reference list of Recognised Technology Application Products)						
證書 (如有，請註明) Certification (If any, please state)						
編號 No.	服務單位 (須同時以中文和英文填寫 Service unit should be completed in both English and Chinese)	服務單位類別 (見附錄 5) Type of service unit (see Appendix 5)				
1		選擇一個分類。Choose one Category.				
2		選擇一個分類。Choose one Category.				
3		選擇一個分類。Choose one Category.				
4		選擇一個分類。Choose one Category.				
5		選擇一個分類。Choose one Category.				
Service unit number 服務單位編號		1	2	3	4	5
以下資料須與報價單一致： The information below should be identical to quotation:						
計劃開始租用日期 (年-月-日) Planned rental commencement date (dd/mm/yyyy)						
計劃結束租用日期 (年-月-日) Planned rental termination date (dd/mm/yyyy)						
總租用時期 (月) Total rental period (Month)						



產品數量 Quantity of product					
每件產品租金 (元) (折扣後) Rent per product (\$) (after discount)					
租金(元) (數量 × 每件產品租金) Amount of rental(\$) (Quantity × rent per product)					
保養費用總數(元) Maintenance fee (total) (\$)					
保養時期(年) (不包括隨產品附送的保養年期) Period of maintenance requested (year) (exclude the free maintenance period provided)					
保養內容(例如上門維修、人工，配件等): Maintenance coverage (e.g. onsite maintenance, labour and parts etc.)					
員工使用科技產品訓練費用(元) Staff training fee for using the technological product (\$)					
雜項費用(元) Miscellaneous expense (\$)					
總款額(元) (包括產品租借及所有有關費用) Total amount (\$) (including product rental and all related fees)					
申請款額比例分配(%) Distribution of amount requested (%)					
總款額(元) (包括所有服務單位) Total amount (\$) (including all service units)					
是否需要專業人員操作該產品? Professional required to operate the product? (Y/N)					
所需專業人員的類別 Type of professional required					
申請服務單位有所需操作產品的專業人員? Professional available on site to operate the product (Y/N)					
如有任何申請服務單位並無所需操作產品的專業人員，有何應對方案? Alternatives when a service unit does not have professional to use the product as required?					
產品受眾和數目 Type and number of beneficiaries	<input type="checkbox"/> 長者(年齡 60 歲或以上) Elderly (aged 60 or above) _____人 persons  <input type="checkbox"/> 殘疾人士 Persons with disabilities 殘疾類別 Type of disability : _____ _____人 persons  <input type="checkbox"/> 護理人員 Care staff _____人 persons (請在適當的方格內加上「✓」號。) (Please“✓”where appropriate.)				

<p>理據 (請詳述產品對受眾帶來的益處。如申報項目包含多個組件/服務項目，則每個組件/服務項目必須提供相應的申請理據。)</p> <p>Justification (Please elaborate how the product could benefit the beneficiaries. If the application includes multiple components/ service items, justification should be provided for each of them.)</p>	
<p>請說明申請機構如何有經驗、能力和專業知識使用有關產品，以及供應商所提供的產品訓練詳情</p> <p>Elaboration on the applicant organization's experience, ability and professional knowledge in using the applied product, and details on training by the vendor</p>	

Please download latest version of application forms from the I&T Fund website.  
請於樂齡及康復創科應用基金網頁下載申請表格最新版本

樂齡及康復創科應用基金申請表格  
(試用新研發科技產品)

**Innovation and Technology Fund for Application in Elderly and Rehabilitation Care  
Application Form  
(Trial Use of Newly Developed Technology Product)**

在填寫此份表格前，請仔細參閱附錄 4 (T)及 6 的指引及樂齡及康復創科應用基金手冊。  
Please study the Guidance Notes at Appendix 4 (T) & 6 and the Innovation and Technology Fund for Application in Elderly and Rehabilitation Care Manual carefully before you complete the form.

一般資料表  
General Information Sheet

1. 申請機構和服務單位簡介  
Brief description of the applicant organisation and service unit

營辦機構：(中)

Operating agency: (English):

通訊地址：(中)

Correspondence address: (English)

電話號碼 Telephone number:

傳真號碼 Fax number:

電郵地址 E-mail address:

牌照編號 License :

負責職員 Responsible staff:

- 機構性質 :  現正接受社會福利署津貼/資助的非政府機構  
Nature of organisation Non-governmental organisation currently receiving subvention / subsidies from the Social Welfare Department
- 現正接受社會福利署資助的私營機構  
Private organisation currently receiving subsidies from the Social Welfare Department
- 申請性質 :  個別服務單位申請  
Type of application Application from individual service unit

同一機構跨服務單位申請  
Joint application from service units of the same organisation

服務單位類別 (可選多於一項)  
Type of service unit(s) (Can choose more than one type)

:  安老服務 Elderly Services  
 康復服務 Rehabilitation Services

服務單位現正接受社會福利署津貼/資助  
Service unit(s) currently receiving subventions/ subsidies from SWD:

是 Yes  
 否 No (如“否”, 申請不合資格  
If “No”, applicant is not eligible)

2. 其他基金或捐助

Other funding or donation

無：是項申請項目並無其他基金／捐款資助。  
No: There is no other funding/donation received on the same project.

有：是項申請項目獲其他基金／捐款資助。  
Yes: There is other funding/donation received on the same project.

基金／捐款名稱：

Name of funding/donation: \_\_\_\_\_

基金／捐款參考編號：

Reference no. of funding/donation: \_\_\_\_\_

基金／捐款性質：

政府 Government     非政府 Non-government

Nature of funding/donation:

基金／捐款款項金額：

港幣 HK\$

Amount of funding/donation: \_\_\_\_\_

聲明  
Declaration

本人代表 \_\_\_\_\_ (申請機構名稱)，並獲其正式授權，作出以下聲明：

I, on behalf of and duly authorised by \_\_\_\_\_ (Name of the applicant organisation),  
declare that

(A) 本申請表格內的資料及夾附於申請表格的資料，均屬真實無誤，並反映截至提交申請當日的真實情況。本人承諾，如上述資料日後如有任何更改(特別是在本申請提交後，獲批予的社會福利署的資助有所改動)，會立即通知社會福利署。如填報資料不正確，申請將被視為無效，同時，社會福利署將取消已批准的撥款，而已支付的款項亦須全數退還《樂齡及康復創科應用基金》。蓄意虛報資料或隱瞞任何重要資料者有可能被轉介到執法機關處理；

all factual information provided in this Application Form as well as the accompanying information are true and accurate and reflect the status of affairs as at the date of submission. I undertake to inform the Social Welfare Department immediately if there are any subsequent changes to the above information (in particular, subsequent change in subsidy from the Social Welfare Department after this application is submitted). Any inaccurate information will make the application invalid such that any grant approved will be withheld and payment made must be refunded in full to the “Innovation and Technology Fund for Application in Elderly and Rehabilitation Care”. Making false declarations or withholding material information may result in referral to law enforcement authorities.

(B) 本申請表格及所有有關材料均不侵犯及不會侵犯任何人的知識產權；  
the Application Form and all the related materials submitted by the applicant organisation does not and will not infringe the Intellectual Property Rights of any person;

(C) 如申請獲得批准，承諾會竭盡所能，按照本申請的批准項目完成計劃，並監察其過程；  
utmost dedication and determination will be given to complete and monitor the funded project according to the approved terms of this application if the application is approved;

(D) 申請機構已通知本申請有關的所有人士／機構，政府可使用本申請表格內的個人資料以審批本申請、履行法定職責、進行有關研究及調查、監察和檢討本申請的處理及整理統計數字；  
the applicant organisation has informed all individuals / parties concerned in this application of the Government’s right to the use of their personal data contained in this application form to process this application, discharge statutory duties, conduct research or surveys, monitor and review the handling of this application and prepare statistics;

(E) 本人在填寫此份表格時已經仔細參閱表格內附錄 4 及 6 的指引及《樂齡及康復創科應用基金手冊》。同時，亦已附上所有需要的有關文件以供審閱；  
I have read the Guidance Notes at Appendix 4 & 6 and the “Innovation and Technology Fund for Application in Elderly and Rehabilitation Care Manual” carefully before completing this form and have also enclosed all the supporting documents required;

(F) 申請機構、其管理委員會、首長或職員於是項申請科技產品並無任何擁有權或成份。  
the applicant organisation, its Board of Management, Head or staff do not have any ownership or share of ownership of the applied innovative technology product.

只需在印文本蓋上印章及簽署  
Chop and signature required for  
hardcopy ONLY.

機構印章 : \_\_\_\_\_  
Organisation chop : \_\_\_\_\_  
機構首長簽署 : \_\_\_\_\_  
Signature of agency head : \_\_\_\_\_  
(簽署) (Signature)  
機構首長姓名 (中) : \_\_\_\_\_  
Name of agency head (English) : \_\_\_\_\_  
機構首長職位名稱 (中) : \_\_\_\_\_  
Post title of agency head (English) : \_\_\_\_\_  
電話號碼 : \_\_\_\_\_  
Telephone No. : \_\_\_\_\_  
日期 : \_\_\_\_\_  
Date : \_\_\_\_\_

(須同時以中文和英文填寫  
should be completed in both  
English and Chinese)

試用新研發科技產品  
申請樂齡及康復創科應用基金撥款詳情(見註<sup>1,2,3</sup>)

**Trial Use of Newly Developed Technology Product**

Details of Application for

Innovation and Technology Fund for Application in Elderly and Rehabilitation Care Grant (see Note<sup>1,2,3</sup>)

註<sup>1</sup>：請提供報價單及產品單張，內容包括價格細項、規格、證書和所需專業人員。如所試用的新研發產品有演示短片或照片，申請機構亦需提供有關連結。

Note<sup>1</sup>: Please provide **quotation and the product catalog** with details including price details, specifications, certification and required operating professional. The applicant organisation should also provide a **link** to the demonstration (videos or photos) of the newly developed product under trial use if necessary.

註<sup>2</sup>：每份申請只可涵蓋一個項目。

Note<sup>2</sup>: Each application should only cover one project.

註<sup>3</sup>：如有需要，可自行加列。

Note<sup>3</sup>: The applicant organisation may add rows if necessary.

申請項目資料

**Project Information**

申請項目名稱	(中)
Project name	(Eng)
申請金額 (HK\$)	_____
Total amount sought (HK\$)	_____
項目統籌人	(中)
Name of project coordinator	(Eng)
職位	_____
Post	_____
電話號碼	_____
Telephone number	_____
電郵地址	_____
Email address	_____

協作伙伴資料

**Information of Collaborative Partner**

協作伙伴名稱	(中)
Name of collaborative partner	(Eng)
協作伙伴類別	<input type="checkbox"/> 本地科研機構 Local research and development companies
Nature of collaborative partner	<input type="checkbox"/> 本地大專院校 Local tertiary institutions
	<input type="checkbox"/> 其他(請註明) Other (please specify):
協作伙伴地址	_____
Address of collaborative partner	_____
協作伙伴項目統籌人	(中)
Project coordinator of collaborative partner	(Eng)
職位	_____
Post	_____
電話號碼	_____
Telephone number	_____
電郵地址	_____
Email address	_____

產品資料  
Product Information

產品名稱 (須與報價單一致) Product name (identical to quotation) (須同時以中文和英文填寫 <i>should be completed in both English and Chinese</i> )	(中) (Eng)
產品品牌 (須與報價單一致) Brand name (identical to quotation)	
產品型號 (須與報價單一致) Model No. (identical to quotation)	
生產商名稱 Name of manufacturer	
產地 Origin	
證書 (如有，請註明) Certification (If any, please state)	
參與試用的服務單位數目 Number of service units participating in the Trial Use	
服務單位 (見註 <sup>3</sup> ) (須同時以中文和英文填寫 <i>should be completed in both English and Chinese</i> ) Service units (see Note <sup>3</sup> )	服務單位類別 (見附錄 5) Type of service units (see Appendix 5)
1.	選擇一個分類。Choose one Category.
2.	選擇一個分類。Choose one Category.
受惠者類別和數目 Type and number of beneficiaries	<input type="checkbox"/> 長者 Elderly Persons _____ 人 persons  <input type="checkbox"/> 殘疾人士 Persons with disabilities 殘疾類別 Type of disability : _____ _____ 人 persons  <input type="checkbox"/> 護理人員 Care staff _____ 人 persons (請在適當的方格內加上「✓」號。) (Please“✓”where appropriate.)
理據 (請詳述產品/項目對受眾帶來的益處。如申請項目包含多個組件/服務項目，則每個組件/服務項目必須提供相應的申請理據。) Justification (Please elaborate benefits of the product/project to the beneficiaries. If application includes multiple components/ service items, justification should be provided for each of them.)	

<p>請說明申請機構使用有關產品的經驗、能力和專業知識，以及供應商所提供的產品訓練詳情 Elaboration on the applicant organisation's experience, ability and professional knowledge in using the applied product and details on training given by vendor</p>	
<p>請詳述若試用產品效果理想，申請機構的跟進計劃（如購買、租借有關產品，或擴大產品應用至其他服務單位等） Description of the applicant organisation's plan if the trial use of the product is satisfactory (e.g. to procure/rent the product, expand adoption of the product to other service units, etc.)</p>	
<p>請詳述若試用產品效果不理想，申請機構的跟進計劃 Description of the applicant organisation's plan if the trial use of the product is unsatisfactory</p>	

**安全合規性**  
**Safety Compliance**

[詳細資料及證明文件由協作伙伴/申請機構以附件形式提供 Details and supportive documents provided by Collaborative Partner /Applicant Organsiation as Annex ]

	有 Yes	無 No	不適用 N/A	已提交有關資料/文件 Information/ Documents provided
<p>產品的安全性及功能測試的內容及結果及證明文件 Content and results of tests on safety and functions of the product and supporting documents</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>產品尚未完成的安全測試的內容及跟進安排 Outstanding safety tests of the product, if any, and the follow up arrangement</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>產品通過實地測試內容及證明文件 Content of field test of the product, if any and supporting documents</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>產品需要配合特定的設施(如無綫網絡，天花連接等)使用詳情，以證明申請服務單位有足夠設施配合產品運作 Required technical/physical infrastructure (e.g. WiFi, product parts mounting to the ceiling) if any, and supportive documents to confirm such infrastructure be available in the service unit to support the use of the product.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



項目進度指標  
Project Milestones

請列明在不同的主要階段，就匯報期擬定達到的進度指標。有關進度指標必須具體、可量度、及與計劃目標相符。

Please set out the project milestones to achieve at different key stages of the reporting period. The milestones should be specific, measurable and relevant to project objectives.

如有需要，請加入新列填寫。

Please insert additional rows for filling if necessary.

計劃開始日期 (年-月-日) Trial use commencement date (dd/mm/yyyy)	
計劃完成日期 (年-月-日) Trial use completion date (dd/mm/yyyy)	

主要階段 Key Stage	期間 (年-月-日) Period (dd/mm/yyyy)	時期 (月) Duration (Month)	詳細內容(包括進行產品測試、員工訓練等。此外須註明該階段所需的專業人員種類及數目) Details (e.g. product testing, staff training. The types and number of professionals should also be stated.)	擬定達到的進度指標 Project milestones to be reached
第一年 1 <sup>st</sup> Year	( ) 至 to ( )			
	( ) 至 to ( )			
第二年 2 <sup>nd</sup> Year	( ) 至 to ( )			
	( ) 至 to ( )			
第三年 3 <sup>rd</sup> Year	( ) 至 to ( )			
	( ) 至 to ( )			

### 預算 Budget

以下預算細項僅供參考。

The following budgetary items are for reference only.

項目類別 Item Category	內容 Content	款項 (元) Amount (\$)			小計 (元) Subtotal (\$)
		第一年 Year 1	第二年 Year 2	第三年 Year 3	
科研產品價格 Price for newly developed technology product(s)	(請註明，如產品數量及單價) (Please elaborate, e.g. quantity of product, unit price)				
科研產品改良/度身訂製費用 (如適用) Price for technology product(s) customization/enhancement (if applicable)					
科技研發公司/ 大專院校顧問費用 Consultation fee for R&D company/ tertiary institution					
員工使用科技產品訓練費用 Staff training fee for using the newly technology product(s)					
保養費用 Maintenance Fee	(請註明保養內容及保養時期， 不包括附送的保養年期) (Please state the maintenance coverage and period, excluding the free maintenance provided)				
雜項費用 Miscellaneous expense					
行政支援開支 (上限為項目總開支的 15%) Administrative overheads (not exceeding 15% of total project cost)	如服務計劃籌備、人力資源及管理、帳目管理及財務監控、內部審計及管控、資訊科技設施供應及技術支援等(請註明) Such as service planning, manpower management, financial management and technical support etc. (Please elaborate)				
	總款項 (元) Total Amount (\$)				

《樂齡及康復創科應用基金》申請表格填寫指引  
Guidance Notes on Completing “Innovation and Technology Fund for Application in Elderly and Rehabilitation Care” (I&T Fund) Application Form  
(購置/租借科技產品)  
(Procurement / Rental of Technology Product)

1. 在遞交本申請表格之前，請先閱讀《樂齡及康復創科應用基金手冊》。(載於社會福利署網頁：公共服務 → 支援服務 → 樂齡及康復創科應用基金，或網址：[https://www.swd.gov.hk/tc/index/site\\_pubsvc/page\\_supportser/sub\\_itfund/](https://www.swd.gov.hk/tc/index/site_pubsvc/page_supportser/sub_itfund/))。Please study the “Innovation and Technology Fund for Application in Elderly and Rehabilitation Care Manual” (available at SWD webpage: Public service → Support service → Innovation and Technology Fund for Application in Elderly and Rehabilitation Care, or website at [https://www.swd.gov.hk/en/index/site\\_pubsvc/page\\_supportser/sub\\_itfund/](https://www.swd.gov.hk/en/index/site_pubsvc/page_supportser/sub_itfund/)) before you lodge an application for the I&T Fund with this Application Form
2. 填妥的申請表格應包括一般資料表及附錄 1 或 2。  
The completed application form should include the General Information Sheet as supported by Appendix 1 or 2 as appropriate.
3. 每份申請只可涵蓋一種用途 (購置或租借) 及一個產品或計劃。  
Each application should only cover one purpose (procurement or rental) and one product or project.
4. 每份申請須提供至少一份報價單及產品單張包括價格細項、規格、證書和所需專業人員。  
Each application should include at least one quotation and the corresponding product catalog with details including price, specifications, certification and required operating professional.
5. 遞交報價單時需注意以下各項：
  - (a) 抬頭應與申請單位名稱相同；  
The name of the applicant service unit and the recipient of the quotation should be identical.
  - (b) 提供報價單的公司必須為香港註冊公司；  
The quotation should be provided by companies registered in Hong Kong.
  - (c) 需清楚列明每項產品組件或服務細項的價格及數量。  
The price and quantity of each product component and service item should be listed in the quotation.
6. 在填寫一般資料表內「服務單位類別」時，請參閱附錄 5，並跟據所列的服務類別填寫。  
Please refer to Appendix 5 and fill in “Type of Service Unit” in the General Information Sheet according to the specified and exact name of the relevant service type.
7. 所有申請的產品必須符合香港所有相關法例和其他相關產品安全指引，包括但並不限於以下各項：  
Use of the product should comply with all relevant laws, regulations and other relevant product safety guidelines in Hong Kong, **including but not limited to the following:**
  - (a) 電氣產品必須符合《電氣產品(安全)規則》(第 406G 章) 所訂的安全規格；  
electrical products should comply with the safety requirements as laid out in the Electrical Products (Safety) Regulation (Cap.406G);
  - (b) 其他產品必須符合《消費品安全條例》(第 456 章) 所訂的安全規定；  
other products should comply with the safety requirement of the Consumer Goods Safety Ordinance (Cap.456); and
  - (c) 所有產品的使用必須符合《安老院條例》(第 459 章)、《醫院護養院及留產院註冊條例》(第 165 章)、《殘疾人士院舍條例》(第 613 章) 和個人資料(私隱)條例(第 486 章) 所訂的規定。  
Use of all products should comply with the requirement of Residential Care Homes (Elderly Persons) Ordinance (Cap.459), Hospitals, Nursing Homes and Maternity Homes Registration

Ordinance (Cap. 165), Residential Care Homes (Persons with Disabilities) Ordinance (Cap.613) and Personal Data (Privacy) Ordinance (Cap.486).

8. 《樂齡及康復創科應用基金》的申請項目不能同時申請其他政府基金。  
Duplication of different Government fundings to cover the same project applied for the I&T Fund is not allowed.
  9. 基金將分批接受申請，唯撥款則視乎基金的餘下可用款項。申請機構計劃申請資助租借或試用科技產品時，亦請參考基金運作的完結日期。  
Applications for the I&T Fund will be invited by batches, subject to the balance of the I&T Fund. When the applicant organisation plans to apply for subsidy for rental or trial use of technology products, please take into consideration the possible termination date of the I&T Fund.
  10. 申請應郵寄或親身送交，包括 (i) 兩份已填妥的申請表格正本連同所需文件；及 (ii) 存有已填妥申請表格的電子版本（微軟 Word 03 或以上格式為佳）的光盤／USB 記憶體至基金秘書處（地址：香港北角英皇道 338 號華懋交易廣場 2 期 31 樓 3105-09 室）。  
Application should be submitted by post or in person with (i) two original hard copies of duly completed application forms together with all the required documents; and (ii) a soft copy of the application form saved in a compact disc/ USB (preferably in MS Word 03 or above format). The application should be addressed or brought in person to the Secretariat to the Innovation and Technology Fund for Application in Elderly and Rehabilitation Care (Rooms 3105-09, 31/F, Two Chinachem Exchange Square, 338 King's Road, North Point, Hong Kong).
- 社會福利署收到申請後，會向申請機構發出認收通知。  
The Social Welfare Department will issue acknowledgment to the applicant organisation after receipt of an application.
11. 政府可在其認為適當時，以及在無須進一步知會申請機構的情況下，披露有關基金申請機構的申請資料，包括但不限於申請機構的資料／個人資料。申請機構提交本申請表格，即表示其不可撤銷，以及無條件地授權並同意政府作出上述任何披露。  
The Government shall have the right to disclose, without further reference to the applicant organisations, whenever it considers appropriate, any information in relation to the submitted applications for the I&T Fund, including but not limited to the information / personal data of the applicant organisation. In submitting the Application Form, each applicant organisation irrevocably and unconditionally authorises the Government to make and consents to the Government making any of the aforesaid disclosure.
  12. 政府或其授權使用者有權使用申請機構所提交的本申請表格及所有相關文件或材料作若干用途，包括但不限於評核申請及管理已批核申請。  
The Government or its authorised users shall have the right to use this Application Form and all the related documents or materials submitted by the applicant organisation, for purposes including but not limited to evaluation of applications and management of approved applications.
  13. 申請機構填寫申請表格時，須提供個人資料。詳情請參閱附件 6 所載的《收集個人資料聲明》。  
Applicants will be required to provide personal data when filling in the Application Form. Please refer to the “Personal Information Collection Statement”, a copy of which is at Appendix 6.

《樂齡及康復創科應用基金》申請表格填寫指引  
(試用新研發科技產品)

**Guidance Notes on Completing “Innovation and Technology Fund for Application in Elderly and Rehabilitation Care” (I&T Fund) Application Form  
(Trial Use of Newly Developed Technology Product)**

1. 在遞交申請表格之前，請先閱讀《樂齡及康復創科應用基金手冊》。(載於社會福利署網頁：公共服務 → 支援服務 → 樂齡及康復創科應用基金，或網址：  
[https://www.swd.gov.hk/tc/index/site\\_pubsvc/page\\_supportser/sub\\_itfund/](https://www.swd.gov.hk/tc/index/site_pubsvc/page_supportser/sub_itfund/))  
Please study the “Innovation and Technology Fund for Application in Elderly and Rehabilitation Care Manual” before you lodge an application for the I&T Fund with the application form. (available at SWD webpage: Public service → Support service → Innovation and Technology Fund for Application in Elderly and Rehabilitation Care, or website at:  
[https://www.swd.gov.hk/en/index/site\\_pubsvc/page\\_supportser/sub\\_itfund/](https://www.swd.gov.hk/en/index/site_pubsvc/page_supportser/sub_itfund/)).
2. 填妥的申請表格應包括一般資料表及附錄 3。  
The completed application form should include the General Information Sheet as supported by Appendix 3.
3. 每份申請只可涵蓋一個項目。  
Each application should only cover one project.
4. 符合申請的科技產品包括：  
The technology products eligible for trial use be:
  - (a) 經過充分測試的新研發科技產品，服務單位可直接應用，而不需要定制；或  
newly developed products that are well-tested and ready for deployment by applicant service units without customisation; or
  - (b) 經過充分測試新研發科技產品，服務單位可在合理成本和時間定制後應用。  
newly developed products that are well-tested and suitable for deployment by applicant service units after customisation within a reasonable time and cost.
5. 每份申請須提供申請項目細節，包括至少一份報價單及產品單張（包括價格細項、規格、證書和所需專業人員等）。如申請的新研發產品有演示短片或照片，申請機構亦須提供有關連結。  
Each application should provide details of the proposed project including at least one quotation and product information (including price, specifications, certification and required operating professional, etc.). The applicant organisation should also provide a link to demonstration (videos or photos) of the newly developed product to be sought if available.  
  
遞交報價單時需注意以下各項：  
Please note the following when providing quotations:
  - (a) 抬頭應與申請單位名稱相同；  
the name of the applicant service unit and the recipient of the quotation should be identical;
  - (b) 提供報價單的公司必須為香港註冊公司；及  
the quotation should be provided by companies registered in Hong Kong; and
  - (c) 須清楚列明每項產品組件或服務細項的價格及數量。  
the price and quantity of each product component and service item should be listed in the quotation.
7. 在填寫一般資料表內「服務單位類別」時，請參閱附錄 5，並跟據所列的服務類別填寫。  
Please refer to Appendix 5 when filling in “Type of Service Unit” in the General Information Sheet according to the specified and exact name of the relevant service type.

8. 所有申請的產品必須符合香港所有相關法例和其他相關產品安全指引，包括但並不限於以下各項：
- Use of the product should comply with all relevant laws, regulations and other relevant product safety guidelines in Hong Kong, including but not limited to the following-
- (a) 電氣產品必須符合《電氣產品（安全）規則》（第 406G 章）所訂的安全規格；  
electrical products should comply with the safety requirements as laid out in the Electrical Products (Safety) Regulation (Cap. 406G);
  - (b) 其他產品必須符合《消費品安全條例》（第 456 章）所訂的安全規定；及  
other products should comply with the safety requirement of the Consumer Goods Safety Ordinance (Cap. 456); and
  - (c) 所有產品的使用必須符合《安老院條例》（第 459 章）、《醫院護養院及留產院註冊條例》（第 165 章）、《殘疾人士院舍條例》（第 613 章）和個人資料（私隱）條例（第 486 章）所訂的規定。  
use of all products should comply with the requirement of Residential Care Homes (Elderly Persons) Ordinance (Cap. 459), Hospitals, Nursing Homes and Maternity Homes Registration Ordinance (Cap. 165), Residential Care Homes (Persons with Disabilities) Ordinance (Cap. 613) and Personal Data (Privacy) Ordinance (Cap. 486).
9. 申請機構須提供證明文件說明有關試用新研發科技產品項目的技術支援範圍。  
The applicant organisation should provide supporting documents to specify the scope of technical support in the trial use project.
10. 申請機構須經各方同意下提供所需資料，並須夾附協作伙伴的同意書，包括為試用新研發科技產品項目提供的顧問範圍。  
The applicant organisation should provide all necessary information with consent of all parties concerned, and should enclose a letter of consent from the collaborative partner.
11. 申請機構須提交由協作伙伴提供新研發科技產品安全合規性的詳細資料及相關證明文件，包括（i）安全性及功能測試相關資料；（ii）未完成的安全測試內容及跟進安排（如有）；（iii）實地測試內容及提供證明文件（如有）；及（iv）需要配合特定的設施（如無綫網絡，天花連接等）使用資料等。  
The applicant organisation should provide the details with supportive documents of safety compliance with the newly technology product provided by the collaborative partner, including (i) tests on safety and function of the product; (ii) outstanding safety tests and follow up arrangement (if any); (iii) field test of the product (if any); and (iv) required technical/physical infrastructure for the use of product, etc..
12. 申請機構填寫申請表格時，須提供個人資料。詳情請參閱附錄 6 所載的《收集個人資料聲明》。  
The applicant organisation will be required to provide personal data when filling in the application form. Please refer to the “Personal Information Collection Statement”, a copy of which is at Appendix 6.
13. 申請機構須說明所提供的個人資料擁有權誰屬。  
The applicant organisation should set out the ownership of the personal data provided.
14. 政府或其授權使用者有權使用申請機構所提交的本申請表格及所有相關文件或材料作若干用途，包括但並不限於評核申請及管理已批核申請。  
The Government or its authorised users shall have the right to use the Application Form and all the related documents or materials submitted by the applicant organisation, for purposes including but not limited to evaluation of applications and management of approved applications.

15. 政府可在其認為適當時，以及在無須進一步知會申請機構的情況下，披露有關基金申請機構的申請資料，包括但不限於申請機構的資料／個人資料。申請機構提交本申請表格，即表示其不可撤銷，以及無條件地授權並同意政府作出上述任何披露。

The Government shall have the right to disclose, without further reference to the applicant organisation, whenever it considers appropriate, any information in relation to the submitted applications for the I&T Fund, including but not limited to the information / personal data of the applicant organisation. In submitting the Application Form, each applicant organisation irrevocably and unconditionally authorises the Government to make and consents to the Government making any of the aforesaid disclosure.

16. 《樂齡及康復創科應用基金》的申請項目不能同時申請其他政府基金。

Duplication of different Government funds to cover the same project for the I&T Fund is not allowed.

17. 基金試用新研發科技產品項目全年均接受申請。申請機構計劃申請試用項目時，亦請參考基金運作的完結日期。

Application for the trial use project under the I&T Fund is open year round, subject to the balance of the I&T Fund. When the applicant organisation plans to apply for trial use project, please take into consideration the termination date of the I&T Fund.

18. 申請應郵寄或親身送交，包括（i）兩份已填妥的申請表格正本連同所需文件；及（ii）存有已填妥申請表格的電子版本（微軟 Word 03 或以上格式為佳）的光盤／USB 記憶體至基金秘書處（地址：香港北角英皇道 338 號華懋交易廣場 2 期 31 樓 3105-09 室）。

Application should be submitted by post or in person with (i) two original hard copies of duly completed application forms together with all the required documents; and (ii) a soft copy of the application form saved in a compact disc/ USB (preferably in MS Word 03 or above format). The application should be addressed or brought in person to the Secretariat to the Innovation and Technology Fund for Application in Elderly and Rehabilitation Care (Rooms 3105-09, 31/F, Two Chinachem Exchange Square, 338 King's Road, North Point, Hong Kong).

社會福利署收到申請後，會向申請機構發出認收通知。

The Social Welfare Department will issue acknowledgment to the applicant organisation after receipt of the application.

安老服務

服務單位類別
<b>院舍照顧服務</b>
1. 安老院／護養院 (請列明床位數量) - 提供50張或以下床位/ - 提供51張至150張床位/或 - 提供150張以上床位
<b>社區照顧及支援服務</b>
2. 長者地區中心 3. 安老院舍外展專業服務試驗計劃 4. 長者鄰舍中心 5. 長者日間護理中心 6. 改善家居及社區照顧服務 7. 綜合家居照顧服務 8. 長者社區照顧服務券試驗計劃下認可服務提供者 9. 長者日間護理單位買位計劃 10. 長者活動中心

康復服務

服務單位類別
<b>院舍照顧服務</b>
1. 殘疾人士院舍／設有住宿服務的特殊幼兒中心／四肢癱瘓病人過渡期護理支援中心 (請列明床位數量) - 提供50張或以下床位/ - 提供51張至150張床位/或 - 提供150張以上床位
<b>日間康復和社區支援服務</b>
2. 日間展能中心 (提供 80 個或以上名額) 3. 綜合職業康復服務中心 (提供 80 個或以上名額) 4. 庇護工場 5. 綜合職業訓練中心 - 日間服務 6. 殘疾人士地區支援中心 7. 精神健康綜合社區中心 8. 日間展能中心 (提供 80 個以下名額) 9. 綜合職業康復服務中心 (提供 80 個以下名額) 10. 特殊幼兒中心 11. 早期教育及訓練中心 12. 嚴重殘疾人士家居照顧服務 13. 嚴重肢體傷殘人士綜合支援服務 14. 四肢癱瘓病人過渡期護理支援中心 15. 日間社區康復中心 16. 到校學前康復服務 17. 私營殘疾人士院舍專業外展服務 18. 家長／親屬資源中心 19. 殘疾人士社交及康樂中心 20. 社區復康網絡 21. 視障人士康復及訓練中心 22. 聽覺受損人士綜合服務中心 23. 為視覺受損人士而設的傳達及資訊服務 24. 自閉症人士支援中心



### Elderly Services

Type of Service Units	
<b>Residential Care Service</b>	
1.	Residential Care Home for the Elderly / Nursing Home (Please specify the number of beds) <ul style="list-style-type: none"> <li>- with a capacity of 50 or below /</li> <li>- with a capacity of 51 to 150 / or</li> <li>- with a capacity of above 150</li> </ul>
<b>Community Care and Support Service</b>	
2.	District Elderly Community Centre
3.	Multi-disciplinary Outreaching Support Teams for the Elderly
4.	Neighbourhood Elderly Centre
5.	Day Care Centre for the Elderly
6.	Enhanced Home and Community Care Services
7.	Integrated Home Care Services
8.	Recognised Service Provider under the Community Care Service Voucher Scheme for the Elderly
9.	Bought Place Scheme on Day Care Units for the Elderly
10.	Social Centre for the Elderly

### Rehabilitation Services

Type of Service Units	
<b>Residential Care Service</b>	
1.	Residential Care Home for Persons with Disabilities / Residential / Transitional Care and Support Centre for Tetraplegic Patients (Please specify the number of beds) <ul style="list-style-type: none"> <li>- with a capacity of 50 or below /</li> <li>- with a capacity of 51 to 150 / or</li> <li>- with a capacity of above 150</li> </ul>
<b>Day Rehabilitation and Community Support Service</b>	
2.	Day Activity Centre (with 80 places or above)
3.	Integrated Vocational Rehabilitation Services Centre (with 80 places or above)
4.	Sheltered Workshop
5.	Integrated Vocational Training Centre – Day Service
6.	District Support Centre for Persons with Disabilities
7.	Integrated Community Centre for Mental Wellness
8.	Day Activity Centre (with below 80 places)
9.	Integrated Vocational Rehabilitation Services Centre (with below 80 places)
10.	Special Child Care Centre
11.	Early Education and Training Centre
12.	Home Care Service for Persons with Severe Disabilities
13.	Integrated Support Service for Persons with Severe Disabilities
14.	Transitional Care and Support Centre for Tetraplegic Patients
15.	Community Rehabilitation Day Centre
16.	On-site Pre-school Rehabilitation Services
17.	Professional Outreaching Team for Private Residential Care Homes for Persons with Disabilities
18.	Support Centre for Persons with Autism
19.	Parents / Relatives Resource Centre
20.	Social and Recreational Centre for the Disabled
21.	Community Rehabilitation Network
22.	Rehabilitation and Training Centre for Visually Impaired Persons
23.	Multi-service Centre for the Hearing Impaired Persons
24.	Communication and Information Service for Visually Impaired Persons

個人資料收集聲明

**Notes about Personal Data**

收集目的

Purposes of Collection

本表格所提供的機構及個人資料，會供社會福利署用以審核貴機構的《樂齡及康復創科應用基金》申請，以及供研究和調查之用。填寫本表格提供個人資料，純屬自願。如未能提供足夠資料，本署可能無法處理有關的《樂齡及康復創科應用基金》申請。

The personal data provided by means of this form will be used by the Social Welfare Department for assessing your application for “Innovation and Technology Fund for Application in Elderly and Rehabilitation Care” and conducting research and surveys. The provision of personal data by means of this form is voluntary. If you do not provide sufficient information, we may not be able to process your application.

向其他轉介資料的人士的類別

Classes of Transferees

在本表格所填報的機構及個人資料，可能會供政府其他決策局、署、部門、專家小組及其統籌者，以及評審委員會等有關單位作上文所述的用途。

The personal data you provide by means of this form may be disclosed to other Government bureaux, commissions, departments, expert group and its coordinator, and assessment panel, etc. for the purposes mentioned above.

查閱個人資料

Access to Personal Data

你有權根據《個人資料(私隱)條例》(第 486 章)第 18 條、第 22 條及附表 1 第 6 原則的規定，就有關你的個人資料提出查閱及改正要求。你的查閱權利包括取得本表格所填報關於你個人資料的副本一份。

You have a right of access and correction with respect to personal data as provided for in Section 18 and 22 and Principle 6 of Schedule 1 of the Personal Data (Privacy) Ordinance, Cap. 486. Your right of access includes the right to obtain a copy of your personal data provided by this form.

查詢

Enquiries

與本申請表所收集的個人資料有關的查詢，包括提出查閱及改正要求，應向下述人士提出：  
Enquiries concerning the personal data collected by means of this form, including the making of access and corrections, should be addressed to :

社會福利署署長

[經辦人：社會工作主任(樂齡及康復創科應用基金)]

香港北角

英皇道 338 號

華懋交易廣場 2 期

31 樓 3105-09 室

電話：3106 2847

傳真：2756 4399

電郵：sitfund@swd.gov.hk

Director of Social Welfare

[Attn: Social Work Officer (Innovation and Technology Fund for Application in Elderly and Rehabilitation Care)]

Rooms 3105-09, 31/F,

Two Chinachem Exchange Square,

338 King's Road,

North Point, Hong Kong

Tel.: 3106 2847

Fax: 2756 4399

E-mail: sitfund@swd.gov.hk

**Maximum Grant by Type of Service Units**

**Table 1: Elderly Services**

Type of Service Units	Maximum Grant (\$ million)
<b>Residential Care Service (per home)</b>	
1. Residential Care Home for the Elderly / Nursing Home	
- with a capacity of 50 or below	0.3
- with a capacity of 51 to 150	0.6
- with a capacity of above 150	0.9
<b>Community Care and Support Service (per centre / unit)</b>	
2. District Elderly Community Centre	
3. Multi-disciplinary Outreaching Support Teams for the Elderly	0.5
4. Neighbourhood Elderly Centre	
5. Day Care Centre for the Elderly	
6. Enhanced Home and Community Care Services	
7. Integrated Home Care Services	0.3
8. Recognised Service Provider under the Community Care Service Voucher Scheme for the Elderly	
9. Bought Place Scheme on Day Care Units for the Elderly	
10. Social Centre for the Elderly	0.2

**Table 2: Rehabilitation Services**

Type of Service Units	Maximum Grant (\$ million)
<b>Residential Care Service (per home)</b>	
1. Residential Care Home for Persons with Disabilities / Residential / Transitional Care and Support Centre for Tetraplegic Patients	
- with a capacity of 50 or below	0.3
- with a capacity of 51 to 150	0.6
- with a capacity of above 150	0.9
<b>Day Rehabilitation and Community Support Service (per centre / unit)</b>	
2. Day Activity Centre (with 80 places or above)	
3. Integrated Vocational Rehabilitation Services Centre (with 80 places or above)	
4. Sheltered Workshop	0.5
5. Integrated Vocational Training Centre – Day Service	
6. District Support Centre for Persons with Disabilities	
7. Integrated Community Centre for Mental Wellness	
8. Day Activity Centre (with below 80 places)	
9. Integrated Vocational Rehabilitation Services Centre (with below 80 places)	
10. Special Child Care Centre	
11. Early Education and Training Centre	
12. Home Care Service for Persons with Severe Disabilities	
13. Integrated Support Service for Persons with Severe Disabilities	0.3
14. Transitional Care and Support Centre for Tetraplegic Patients	
15. Community Rehabilitation Day Centre	
16. On-site Pre-school Rehabilitation Services	
17. Professional Outreaching Team for Private Residential Care Homes for Persons with Disabilities	
18. Support Centre for Persons with Autism	
19. Parents / Relatives Resource Centre	
20. Social and Recreational Centre for the Disabled	
21. Community Rehabilitation Network	
22. Rehabilitation and Training Centre for Visually Impaired Persons	0.2
23. Multi-service Centre for the Hearing Impaired Persons	
24. Communication and Information Service for Visually Impaired Persons	

Please download latest version of claim form from the I&T Fund website.

To : The SWD

**“Innovation and Technology Fund for Application in Elderly and Rehabilitation Care”**

**(I&T Fund)**

**Claim Certificate**

Please read the notes on page 2 carefully before completing the Certificate

Name of the Approved Applicant Organisation: \_\_\_\_\_

The Approved Applicant Service Unit(s): \_\_\_\_\_

SWD File Reference and Date of Approval of the Grant: \_\_\_\_\_

Description of Grant: \_\_\_\_\_

(As stated in the caption of the letter of approval)

Grant Code: \_\_\_\_\_

In relation to our claim for payment(s) under the I&T Fund for the item(s) listed in the attached form [for procurement of innovative technology product(s)] attached, I am authorised by the approved applicant organisation to certify that

- (1) the item(s) currently claimed under the form: -
- (a) is / are the exact item(s) approved by the I&T Fund;
  - (b) has / have been received in good conditions;
  - (c) is / are in accordance with approved specifications and certifications;
  - (d) has / have not been claimed previously and settled by the I&T Fund;
  - (e) has / have been checked to be correct against the supporting invoices and receipts in respect of the quantities, unit prices and amounts; and
  - (f) has / have been purchased by quotation or tender in accordance with the procurement principles and / or procedures as laid down in Chapter 5 of the I&T Fund Manual.
- (2) \* full receipt(s) has / have been attached /  
\* the claim for the item(s) under the form not yet supported by receipt(s) but with invoice(s) is made with the justifications given below and such receipt(s) will be submitted as soon as possible and in any case within one month after receipt of payment from the I&T Fund.

Justifications: \_\_\_\_\_

- (3) the unclaimed balance (net of the current claim) of the grant amounting to \$ \_\_\_\_\_ will be reverted to the I&T Fund

Signature of Agency Head: \_\_\_\_\_ Name of Agency Head: \_\_\_\_\_

Official Chop of Organisation: \_\_\_\_\_ Date: \_\_\_\_\_

(\*Delete as appropriate)

### Notes

1. Each claim must be covered by a separate Claim Certificate.
2. For each item currently claimed under the Form, one quotation record sheet (on page 3) should be submitted together with all corresponding quotations with details including price details, specifications, certification and required operating professional.
3. To correct Grant Code as advised by the Social Welfare Department must be quoted to identify the particular grant against which the current claim is being made.
4. All forms, invoices / receipts, certificates, quotations, etc. should be submitted in duplicate.
5. Failure to complete the claim forms properly may cause delay in reimbursement.

款項付予銀行授權書  
**AUTHORITY FOR PAYMENT TO A BANK**  
 請以中文或英文填寫本表格第 I、II 及 III 欄  
 Please complete sections I, II and III of this form in Chinese or English  
 (本表格如有任何塗改，概不受理)  
 (This form will not be accepted if it contains any erasure or amendment)

I  參閱背頁- 只供收款 人填寫的 附註 See Notes Overleaf - For Payee's Use	致： To: <div style="border: 1px solid black; height: 100px; width: 100%;"></div>	只供部門填寫 FOR DEPARTMENT USE ONLY IV 供應商編號 Supplier No. <div style="border: 1px solid black; height: 40px; width: 80%; margin: 10px auto;"></div>		
參閱背頁 註一 See Note 1 Overleaf	請將應付給我／我們的全部款項存入我／我們在下述銀行的帳戶 All sums due to me/us should be paid into my/our bank account with the 銀行 <input style="width: 300px;" type="text"/> 分行 <input style="width: 150px;" type="text"/>			
參閱背頁 註二 See Note 2 Overleaf	本授權書只適用於下述事務的付款：— This Authority applies to payments to me/us in respect of the following transaction(s) only :- ..... 付款給我／我們所須的資料詳情載於第II欄 The particulars necessary to effect payment to me/us are given in Section II below			
參閱背頁 註三 See Note 3 Overleaf	II 收款人名稱：個人— 先寫姓氏 (最多可填寫80個英文字母或40個中文字) Payee's Name: For individual - Surname first (Maximum 80 characters for English or 40 words for Chinese) <table border="1" style="width:100%; border-collapse: collapse; height: 30px;"> <tr> <td style="width:100%;"></td> </tr> </table> 地址 (最多可填寫120個英文字母或60個中文字) Address (Maximum 120 characters for English or 60 words for Chinese) <table border="1" style="width:100%; border-collapse: collapse; height: 60px;"> <tr> <td style="width:100%;"></td> </tr> </table>			
參閱背頁 註四 See Note 4 Overleaf	銀行帳戶 Bank Account 銀行編號 <input style="width: 80px;" type="text"/> 分行編號 <input style="width: 80px;" type="text"/> 帳戶號碼 <input style="width: 150px;" type="text"/> Bank Code Branch Code Account No. 英文銀行帳戶名稱(適用於在上列以中文填寫了收款人名稱) Name of Bank Account in English (for payee's name completed in Chinese above) <table border="1" style="width:100%; border-collapse: collapse; height: 30px;"> <tr> <td style="width:100%;"></td> </tr> </table>			
參閱背頁 註五 See Note 5 Overleaf	我／我們選擇以傳真方式或電子郵件接收領款通知書(請選擇其中一種方式)，我／我們的傳真號碼或電子郵件地址是：— I/We elect to receive the Remittance Advice by fax or by e-mail (please choose one method only). My/Our fax number or e-mail address is: 傳真號碼 Fax No. <input style="width: 150px;" type="text"/> 電子郵件地址 e-mail address <input style="width: 650px;" type="text"/>			
參閱背頁 註六 See Note 6 Overleaf	III 我／我們同意 I/We hereby agree that 一、 銀行向政府表示收到款項的證明，足以代替我／我們的收款證明。 1. The Bank's acknowledgment to the Government will be sufficient discharge in lieu of acknowledgment by me/us 二、 我／我們填報在本表格內的付款辦法指示，在付款方式方面，對政府並無約束力。 2. My/Our payment instructions on this form do not bind the Government in regard to the manner in which payment may be made. 三、 無論屬於何等理由，倘銀行未獲足夠資料確定收款的帳戶，以致款項在未收到進一步資料之前暫停支付，政府並不負責我／我們因銀行帳戶未能如期收到款項所遭受的任何損失或不便。 3. Where, for any reason, insufficient details are furnished to the Bank to determine the account to be credited and the sum is held in suspense pending receipt of further information, the Government will not be responsible for any loss or inconvenience suffered by me/us as a result of the bank account not being credited at the normal time. 個人 For individual 公司／團體 For company/organization <table border="1" style="width:100%; border-collapse: collapse; height: 150px;"> <tr> <td style="width:100%; text-align: center;">                             公司印章 Official Stamp                                  獲公司／團體授權之認可簽署                              Authorized signature                              For and on behalf of the company/organization                         </td> </tr> </table> 簽名 Signature ..... 姓名(正楷) Name in block letters ..... 香港身分證／護照號碼 H.K.I.C./Passport No. .... 電話號碼 <input style="width: 80px;" type="text"/> 日期 <input style="width: 80px;" type="text"/> Telephone No. .... Date ..... 姓名(正楷) Name in block letters ..... 職位 Position ..... 電話號碼 <input style="width: 80px;" type="text"/> 日期 <input style="width: 80px;" type="text"/> Telephone No. .... Date .....		公司印章 Official Stamp     獲公司／團體授權之認可簽署 Authorized signature For and on behalf of the company/organization	
公司印章 Official Stamp     獲公司／團體授權之認可簽署 Authorized signature For and on behalf of the company/organization				

## 附註

### 個人資料收集聲明

1. 你所提供的資料，將作政府付款給你的用途。
2. 政府可能將部分或全部資料轉交其他已獲法律授權接收的人士。
3. 在《個人資料（私隱）條例》列明的豁免範圍內，你有權取得及更正個人資料。
4. 如欲取得或更改個人資料，請聯絡與你有收支往還的政府部門。

### 只供收款人填寫（第 I，II 及 III 欄）

1. 收款人如為公司或團體，在遞交本表格時，須附交一封使用該公司或團體的正式信紙的說明函件，並須由獲該公司或團體授權的人士簽署。
2. 如欲將本授權書的適用範圍限定於若干項事務，請列明該等事務。
3. 切勿在一空格內填寫超過一個字或一個數字。倘因篇幅所限而未能于行末填寫一個完整的詞彙，須在下一行填上整個詞彙。
4. 帳戶持有人的名稱應與收款人的名稱完全相符。如未能確定銀行編號，請向有關銀行查詢。
5. 款項如須存入聯名帳戶，應列明該帳戶的英文全名而收款人名稱應是聯名帳戶的一部分。
6. 如希望以傳真方式或電子郵件接收領款通知書（只可選擇其中一種方式），請填妥傳真號碼或電子郵件地址，否則領款通知書將經郵遞寄上。未能經傳真或電子郵件送達的領款通知書將改以郵遞送交。
7. 請把填妥表格寄回你通常致送發票的部門，或香港灣仔告士打道7號入境事務大樓2907室庫務署財務管理組。如有查詢，請致電2829 4894。

### 只供部門填寫

#### 第 I 欄

在供收款人填寫表格前，在“致”字旁的空框內填上接收填妥表格的部門或辦事處的名稱及地址。如收款人銀行帳戶欄資料有任何更改，須另填一份新表格。

#### 第 IV 欄

在政府財務管理資料系統更新後填寫。

## Notes

### Personal Information Collection Statement

1. The information provided by you will be used for purposes of effecting payments to you by the Government.
2. The Government may give some or all of the information to other parties authorized by law to receive it.
3. Subject to exemptions under the Personal Data (Privacy) Ordinance, you have a right of access and correction with respect to personal data.
4. Request for personal data access and correction should be addressed to the relevant Government departments with which you have dealings.

### For Payee's Use (Sections I, II and III)

1. For companies/organizations, this form must be accompanied by a covering letter on the official letterhead of the company/organization and signed by an authorized signatory of the company/organization.
2. If it is desired to restrict this Authority to payments in respect of certain transactions only, please specify those transactions.
3. Do not use one space for more than one letter or one digit. Where a complete word cannot be entered at the end of a row because of insufficient space, the whole word should be entered in the next row.
4. The bank account should have the same name as the payee's name. If you do not know the bank code of your bank account, please contact your banker.
5. Where payment is to be made into a joint account, the full name of the joint account in English must be stated and the payee's name should form part of the name of the joint account.
6. Please enter your fax number or e-mail address if you wish to receive the Remittance Advice by fax or by e-mail (choose one method only).  
Otherwise, the Remittance Advice will be sent by post. Remittance Advice which cannot be successfully sent by fax or by email will be sent by post.
7. Please send the completed form to the bureau or department to which you normally issue your invoices; or Director of Accounting Services (Attn.: Financial Control Section) at Room 2907 Immigration Tower, 7 Gloucester Road, Wan Chai, Hong Kong.  
For enquiries, please call 2829 4894.

### For Department Use

#### Section I

Before passing the form to the payee for completion, enter in the box beside the word 'To' the name AND address of the department, or office to which the payee should return the completed form. If there is a change in the bank account details of the payee, a new form must be completed.

#### Section IV

To be completed after the supplier record has been updated in the Government Financial Management Information System.



**Sample**  
**[Name of the Approved Applicant Organisation]**  
**Statement of Income and Expenditure**  
**for Rental Projects and Trial Use Projects under**  
**Innovation and Technology Fund for Application in Elderly and Rehabilitation Care**  
**(I&T Fund)**

	2019 HK\$	2018 HK\$
<b>Income</b>		
Grants payments received from the I&T Fund		
- for Rental Projects listed in Note 1	X	X
- for Trial Use Projects listed in Note 2	X	X
Contribution / Donations / Interest received		
- for Rental Projects listed in Note 1	X	X
- for Trial Use Projects listed in Note 2	X	X
	X	X
<b>Expenditure</b>		
Approved Expenditure paid		
- for Rental Projects listed in Note 1	X	X
- for Trial Use Projects listed in Note 2	X	X
Refund of unused grants / surplus to the I&T Fund		
- for Rental Projects listed in Note 1	X	X
- for Trial Use Projects listed in Note 2	X	X
	X	X
<b>Surplus / (Deficit) for the year</b>	X	X
Surplus / (Deficit) brought forward from previous year	X	X
<b>Balance at the end of year</b>	X	X

I certify that

- (a) All transactions of the respective projects under the I&T Fund have been reported in the **statement of income and expenditure**; and
- (b) All expenditure is solely for the purposes prescribed in the respective approval letters from the Social Welfare Department.

Signature(s):

Name(s):

Position(s) Held:

Date:

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(Organisation Chop)

Notes to the statement of income and expenditure:

1 Breakdown of income and expenditure of approved rental projects are as follows –

Grant Code	As at 31 March 2019						
	Surplus / (Deficit) brought forward	Grants received from the I&T Fund	Contribution / Donations Received	Expenditure paid	Refund of surplus to the I&T Fund	Surplus / (Deficit) carry forward	Project Status (Active / Completed)
	HK\$	HK\$	HK\$	HK\$	HK\$	HK\$	
	(a)	(b)	(c)	(d)	(e)	(a)+(b)+(c) -(d)-(e)	
Total							

2 Breakdown of income and expenditure of approved trial use projects are as follows –

Grant Code	As at 31 March 2019						
	Surplus / (Deficit) brought forward	Grants received from the I&T Fund	Contribution / Donations / Interest received	Expenditure paid	Refund of surplus to the I&T Fund	Surplus / (Deficit) carry forward	Project Status (Active / Completed)
	HK\$	HK\$	HK\$	HK\$	HK\$	HK\$	
	(a)	(b)	(c)	(d)	(e)	(a)+(b)+(c) -(d)-(e)	
Total							

3 The statement of income and expenditure is prepared on cash basis, that is, income is recognised upon receipt of cash and expenditure is recognised upon expenses are paid. Non-cash items like depreciation, provisions and accruals should not be included in the statement of income and expenditure.

## **Avoiding Conflict of Interest in Procurement**

### **General and Applicability**

1. It is the responsibility of all levels of Head / staff to ensure the integrity and impartiality of the organisation's procurement process. Conflict of interest situations may arise in cases where a member exercises his authority, influences decisions and actions or gains access to valuable information, perhaps but not necessarily restricted or confidential. Conflict of interest may also arise from participation by suppliers / contractors in procurement. All members involved in procurement must be alert to situations which may lead to actual, potential or perceived conflict of interest and ensure that sufficient safeguards are in place to avoid such situations from arising. The principles and guidelines set out in this annex apply to all types of procurement, irrespective of value.

### **Avoiding Conflicts with Private Interests**

2. All members involved in procurement, including in particular the head or chairperson, members and / or secretary of all committees / working groups responsible for preparing quotation / tender documentation (including tender specifications and marking schemes), tender opening teams, quotation / tender assessment panels, quotation / tender committees, quotation / tender boards, must —
  - (a) avoid conflicts, whether actual, potential or perceived, arising between their official duties and their private interests. Private interests include the financial and other interests of the member, the member's relatives and close associates, or persons to whom the member is indebted or owes a favour;
  - (b) declare all such conflicts or relevant private interests as soon as the member is aware of them to enable his supervisors, the Head or the chairperson of the relevant quotation / tender preparation team, tender opening team, quotation / tender assessment panels, quotation / tender committees, quotation / tender board to decide whether the member should continue to be involved in the specific procurement exercise;
  - (c) observe prevailing guidelines on how to prevent or deal with conflict of interest situations; and

- (d) observe prevailing regulations and not make unauthorised disclosure or take advantage of any quotation- / tender-related information whether or not for personal gain.
3. All members involved in preparing quotation / tender documentation (including quotation / tender specifications and marking schemes), assessing quotations / tenders and conducting negotiations must declare whether they have any actual, potential or perceived conflict of interest upon their taking up of the respective responsibilities in procurement matters and as soon as they become aware of such actual, potential or perceived conflict of interest. The organisations must state in each quotation / tender report whether or not the members involved in preparing quotation / tender documentation (including quotation / tender specifications and marking schemes), assessing quotation / tenders and conducting negotiations have declared their interest and, where conflicts of interest (actual, potential or perceived) have been identified, what remedial action has been taken. A specimen declaration and undertaking is at Annex 5.2.
  4. The Head or chairperson, members and / or secretary of all tender opening teams, quotation / tender committees, quotation / tender boards who handle procurement matters are required to sign an undertaking upon taking up these responsibilities, and are also required to renew their undertaking at regular intervals. A specimen undertaking is at Annex 5.3.
  5. Heads of the procuring organisations must —
    - (a) remind all members involved in procurement, at regular intervals, to observe strict confidentiality rules with regard to quotation- / tender-related information and to declare any private interests as may arise in relation to the procurement, or in relation to the parties offering the stores, services or contracts being procured;
    - (b) ensure that all declarations are drawn to the attention of the Head or the chairperson of the quotation / tender preparation team, tender opening team, quotation / tender assessment panels, quotation / tender committees, quotation / tender board as the case may be. If the member making the declaration is the Head or the chairperson himself, his declaration should be drawn to the attention of his supervisor. All such declarations and actions taken must be recorded and filed properly;
    - (c) if a member has declared an interest and the supervisor, the Head or the chairperson of the quotation / tender preparation team, tender opening team, quotation / tender assessment panels, quotation /

tender committees, quotation / tender board rules that the member should not continue to handle the specific procurement exercise, redeploy, if necessary, other staff to take the place of the member who has declared an interest in the procurement exercise; and

- (d) consider and if appropriate draw up supplementary guidelines to fit the circumstances of the organisation on the detection and avoidance of conflicts in procurement.

**Declaration and Undertakings by All Levels of Head / Staff Involved in Preparing Quotation / Tender Documentation (including Quotation / Tender Specifications and Marking Schemes), Assessing Quotation / Tender and Conducting Quotation / Tender Negotiations**

**[Quotation / Tender Reference and Subject I&T Fund Application]**

I hereby declare that there is no conflict of interest, whether actual, potential or perceived, between my official duties to the \_\_\_\_\_ (Name of the applicant organisation / approved applicant organisation) in relation to the captioned quotation / tender exercise, including without limitation those in relation to the preparation of the quotation / tender documentation (including quotation / tender specifications and marking schemes), the assessment of quotations / tenders and the conduct of negotiations, and my financial, professional, commercial, personal or other interests.

2. I undertake to –
  - (a) hold in strict confidence all quotation information that I have access to through my official duties to the aforesaid organisation in relation to the captioned quotation / tender exercise, including without limitation those in relation to the preparation of the quotation / tender documentation (including quotation / tender specifications and marking schemes), the assessment of quotations / tenders and the conduct of negotiations. Quotation / Tender information includes details of quotations / tenders received and any other sensitive, restricted or confidential information relating to a quotation / tender;
  - (b) refrain from making any unauthorised disclosure or taking advantage of any quotation / tender information referred to in paragraph 2(a) above whether or not for personal gain;
  - (c) declare any actual, potential or perceived conflict of interest with my official duties to the aforesaid organisation in relation to the captioned quotation exercise, including without limitation those in relation to the preparation of the quotation / tender documentation (including quotation / tender specifications and marking schemes), the assessment of quotations / tenders and the conduct of negotiations immediately when I become aware of any such conflict; and
  - (d) take steps to avoid any conflict of interest with any potential supplier / tenderer or supplier / tenderer by not putting myself in a position of obligation towards any of them; for example, by not accepting any favour or lavish or excessive entertainment, and not over-socialising with any of them.
3. The undertakings in paragraphs 2(a) and (b) above shall not apply –
  - (a) if and when the disclosure and information therein referred to becomes a matter of public knowledge [other than by reason of a breach of paragraphs 2(a) and (b) above]; or
  - (b) to any communications or disclosures caused or permitted by me to colleagues in the aforesaid organisation who are or are expected to be involved in the course of their official duties in the captioned quotation / tender exercise or parts thereof.

4. I understand that I may be subject to disciplinary action should I make a false declaration or fail to observe any of my above undertakings.

**Signed** : \_\_\_\_\_

**Name (block letters)** : \_\_\_\_\_

**Title / Rank** : \_\_\_\_\_

**Date** : \_\_\_\_\_



**Undertakings by All Levels of Head or Staff, Members and / or Secretary of Tender Opening Teams / Quotation or Tender Committees / Quotation or Tender Boards**

**[Quotation / Tender Reference and Subject I&T Fund Application]**

I undertake to hold in strict confidence all quotation / tender information that I have access to through my position as a Head / chairperson / member / secretary of the above Tender Opening Team / Quotation or Tender Committee / Quotation or Tender Board. Quotation / Tender information includes details of quotations / tenders received and any other sensitive, restricted or confidential information relating to a quotation / tender.

2. I undertake not to make any unauthorised disclosure or take advantage of any quotation / tender information referred to in paragraph 1 above whether or not for personal gain.

3. I undertake to declare any actual, potential or perceived conflict of interest with my official duty as a Head / chairperson / member / secretary of the Tender Opening Team / Quotation or Tender Committee / Quotation or Tender Board immediately when I become aware of any such conflict.

4. I undertake to take steps to avoid any conflict of interest with any potential supplier / potential tenderer or supplier / tenderer by not putting myself in a position of obligation towards any of them; for example, by not accepting any favour or lavish or excessive entertainment, and not over-socialising with any of them.

5. I understand that I may be subject to disciplinary action should I fail to observe any of my above undertakings.

**Signed** : \_\_\_\_\_  
**Name (block letters)** : \_\_\_\_\_  
**Title / Rank** : \_\_\_\_\_  
**Date** : \_\_\_\_\_