

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

Social Welfare Department
The Government of the Hong Kong Special Administrative Region

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(Disclaimer: This Manual has been translated into Chinese. If there is any inconsistency or ambiguity between the English version and the Chinese version, the English version shall prevail.)

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(Please download latest version of documents from the I&T Fund website)

Chapter 1

Introduction

1.1 Purpose

- 1.1.1 This Manual sets out the requirements 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 shall comply with these provisions relating to the I&T Fund grants.
- 1.1.2 This Manual is issued by the Director of Social Welfare (DSW) who may amend, supplement, apply, interpret and make exceptions to them. There will be periodic reviews and updates to the Manual. Practice and guidance notes may also be issued by the SWD from time to time to supplement the Manual.
- 1.1.3 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 also familiarise themselves with the background and requirements in Chapters 1, 4 and 5.

1.2 Ambit

- 1.2.1 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 trial technology products for improving the quality of life of service users as well as reducing the burden and pressure of care staff and carers. In 2024-25, the Government injected an additional \$1 billion into the I&T Fund to enhance subsidies for

eligible elderly and rehabilitation service units to procure, rent or trial technology product, as well as to expand the scope of the I&T Fund to cover technology products suitable for household use.

1.2.2 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 grants to trial newly developed technology products in their elderly and rehabilitation service units.

1.2.3 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 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.

1.2.4 Eligibility of applicant organisations –

Non-governmental organisations (NGOs) and private organisations¹ receiving subventions and/or subsidies from the SWD for 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 are eligible to apply. Starting from the Tranche 8 of the I&T Fund launched in September 2022, the application for procurement and rental of technology products extended from subsidised residential care homes (RCHs) to non-subsidised RCHs, including private and self-financing residential care homes for the elderly or persons with disabilities. The eligibility applies at the time of application and at the time of approval for being eligible to be approved with the fund, as well as at the time of grants utilisation for being eligible to be released of the grants °

1.2.5 Eligible applicant organisations may apply for grants under the I&T Fund by individual eligible service unit, or it may make joint applications on the basis of eligible cross service units of the same organisation for shared procurement, rental or trial use² 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 grants from the I&T Fund to be assigned to each of the service units involved in the joint application.

1.2.6 Except for applications for procurement or rental of innovative technology products that are exactly identical to those on the reference

¹ Eligible private organisations currently receiving subsidies from the SWD include (i) residential care homes for the elderly (RCHes) participating in the Enhanced Bought Place Scheme; (ii) residential care homes for persons with disabilities (RCHDs) 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; (v) RSPs under the Residential Care Service Voucher Scheme for the Elderly and (vi) Bought Place Scheme on Day Care Units for the Elderly.

² The application for trial use of technology products is only applicable to elderly and rehabilitation service units receiving subsidies from Social Welfare Department.

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 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 provide supplementary information at the AP meeting on their applied products.

1.2.7 Applications for grants from the I&T Fund are subject to the approval of the DSW on the advice of the AP of the I&T Fund.

1.2.8 Eligible subvented NGOs that have justifiable grounds for applying for funding to procure innovative technology products before the commencement of their services are required to submit the relevant justifications together with their applications for SWD's consideration. Each application will be assessed on its own merits, and SWD reserves the sole and absolute discretion in processing and approving such applications.

1.3 Compliance

1.3.1 In applying for and using grants from the I&T Fund to procure, rent or trial innovative technology products, the applicant organisations have

to ensure and undertake that use of any of the products shall comply with all the related and necessary statutory Ordinances, operational guidelines, rules and procedures, 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, Private Healthcare Facilities Ordinance (Cap. 633), 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 have passed all the required certifications, etc.

- 1.3.2 When submitting I&T Fund applications for procurement, rental or trial use of technology products, the applicant organisations, including their Board of Management, Head or staff must ensure that they do not have any ownership or share of ownership of the applied products.
- 1.3.3 The applicant organisations must ensure that their insurance, compensation and complaint policies cover any complaint on, loss of or damages 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.
- 1.3.4 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 grants of the I&T Fund.

1.4 Probity and National Security

- 1.4.1 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 are prohibited from all forms of bribery and corruption. They are prohibited from soliciting, accepting or offering any bribe in conducting all business or affairs of the SWD, HKCSS or organisations and must comply with the Prevention of Bribery Ordinance of Hong Kong (Cap. 201).

- 1.4.2 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 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

Sample Code of Conduct for Staff of Non-Governmental Organisations in Social Welfare Sector

https://cpas.icac.hk/UploadImages/InfoFile/cate_43/2023/29780662-bc5b-4d9a-8293-fa975f4c9453.pdf

Sample Code of Conduct for Board Members of Non-Governmental Organisations in Social Welfare Sector

https://cpas.icac.hk/UploadImages/InfoFile/cate_43/2023/fc5f1e43-bb1a-4ff1-937c-bce61da8d929.pdf

Brief Description of the Sample Code of Conduct for the Private Sector

https://cpas.icac.hk/UploadImages/InfoFile/cate_43/2019/fd4f9dce-3e2c-4a92-a26b-90b22ee6800d.pdf

- 1.4.3 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.
- 1.4.4 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.
- 1.4.5 The applicant organisations shall observe the requirement to safeguard national security. The SWD may immediately terminate the subsidy upon the occurrence of any of the following events or circumstances –
- (a) the applicant organisation has engaged or is engaging in acts or activities that are likely to constitute or cause the occurrence of offences endangering national security or which would otherwise be contrary to the interest of national security; or
 - (b) the continued engagement of the applicant organisation is contrary to the interest of national security; or
 - (c) the SWD reasonably believes that any of the event mentioned above is about to occur.

1.5 Mediation Clause

- 1.5.1 In the event of any dispute or difference arising out of or in connection with the result of the application for I&T Fund, SWD and the applicant organisations shall first refer to mediation in accordance with the Government of Hong Kong Special Administrative Region Mediation Rules prevailing at the time. If the said dispute or difference is not

settled by mediation, SWD or the applicant organisations may institute litigation / arbitration in respect of the said dispute or difference. SWD and the applicant organisations agree that the courts of Hong Kong shall have exclusive jurisdiction in respect of the said dispute or difference.

Chapter 2

Procurement and Rental of Innovative Technology Products

2.1 Preamble

- 2.1.1 This Chapter sets out the rules and procedures for the application, the payment of grant and relevant administrative requirements with regard to the procurement and rental of innovative technology products as well as the lending arrangement on innovative technology products for household use.

2.2 Submission of Applications

- 2.2.1 Applications for the I&T Fund under this Chapter should contain completed information and documents listed in the application form at **Annexes 2.1(a) to 2.1(e)** and send to the Secretariat to Innovation and Technology Fund for Application in Elderly and Rehabilitation Care of the SWD. The envelop 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 (preferably in Microsoft Word 2003 or above format stored in CD-ROM Disc or USB drive) and two original hard copies of the completed application form should be included in each I&T Fund application. Electronic applications can be submitted by completing the “E-Forms” on the SWD’s website (<https://www.swd.gov.hk/en/eservice/eform/>).

2.3 Procurement and Rental of Innovative Technology Products

- 2.3.1 The I&T Fund accepts 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 should not impose extra financial burden on the service users or the Government; and
- (c) upon request of the AP, the approved applicant organisation is required to make available 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 grants 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 2.3**. A single service unit may submit multiple applications, provided that the total amount of grants in all the applications does not exceed the ceiling applicable to the service unit. NGOs' management may redeploy the grants among eligible subvented service units under the same service type after assessing their needs, with the condition that the total applied amount of grants should not exceed the total amount of maximum grants allocated to the subvented service units of the NGO concerned. Notification of virement of grants is required and should be made in written by the eligible NGOs to the SWD. Eligible NGOs should inform the SWD of the virement by completing the Notification Form of Virement at **Annex 2.1(f)**.

- 2.3.4 The amount of the I&T Fund grants 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. Duplication of different Government funds to cover the same applied products is however not allowed.
- 2.3.5 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.
- 2.3.6 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 grants 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 grants. No supplementary grants will be given under any circumstances.
- 2.3.7 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 (Please refer to 2.4.3 for the timeframe). Moreover, the approved applicant organisations have to notify the SWD of the date of procurement or rental while submitting payments claims.

2.4 Payment of Grant

- 2.4.1 Payment of the I&T Fund grants 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 certificate (see **Annex 2.4**) 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 SWD will retain the original invoices and receipts for record keeping unless requested by the claimant and provided with a self-address envelope with sufficient postage; and
- (c) evidence of having used up the donation or contribution received if the approved product 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. Applicant organisations are required to apply for an extension for the submission of claim documents in writing, supported by evidence, in cases where there are delays in production schedule, shipping or delivery. 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 grants 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 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 grants 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 quarterly 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 2.5**. Otherwise, a cheque will be issued to the organisation.
- 2.4.7 Where a product 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 grants paid to the approved applicant organisation.
- 2.4.9 Any surplus of the grants 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 grants will be borne by the approved applicant organisations.

2.5 Lending I&T Fund Products to Elderly Persons, Persons with Disabilities and Carers for Use at Home

2.5.1 All subvented elderly or rehabilitation service units providing non-residential care services, i.e. day centres, community care services or support services can submit applications for the I&T Fund throughout the year.

2.5.2 Applicant organisations may procure suitable technology products for lending to elderly persons, persons with disabilities or their carers for use at home, so as to improve the quality of life of the service users and relieve the pressure of their carers. The maximum amount of grants under each application is \$200,000, subject to the availability of funding for the allocation. The application amount will not be counted towards the maximum grants of the respective service units. Joint applications by different NGO's or service units within the same service type will be accepted. Applications will be considered on individual merits based on the following principles –

- (a) the technology products under application should benefit their service users of the applicant organisation(s) or relieve the stress of their carers;
- (b) the service users of the applicant organisation(s) will be arranged to borrow the technology products for use at home; and
- (c) the applicant organisation(s) should provide training and maintenance support as appropriate on the use of the products under application.

2.5.3 The applicant organisations shall provide an implementation and monitoring plan for the lending arrangement in the I&T Fund applications, including an evaluation of the effectiveness of the lending service and the technology products in supporting elderly persons,

persons with disabilities and their carers in the community. The SWD will conduct technical assessment of the application for the AP to consider the feasibility of the application and determine an appropriate grant amount. The amount of grants may cover the cost of staff training on how to use the relevant technology products, the cost of warranty or maintenance of the products for a maximum of five years, and administrative overhead expenses at 5% of the total cost. No supplementary grant will be provided. The points-to-note on the lending arrangement are as follows –

- (a) As a prerequisite requirement before lending a technology product, applicant organisations should deploy suitable in-house professionals to conduct an assessment of their service user's suitability for borrowing the product and gear the product to his/her care or rehabilitation needs;
- (b) Applicant organisations should provide adequate training and support to their service users and/or carers, and review their service users/members' conditions and needs regarding the use of the technology product throughout the lending period;
- (c) Applicant organisations should ensure that the product is in good conditions before lending it out, and arrange for delivery and cleaning of the used/returned products;
- (d) Applicant organisations should consider procuring public liability insurance if necessary. Some insurance policies may cover liabilities on the use of the product by service users;
- (e) Applicant organisations should assess the risk level of a product might bring if used improperly before it is included in the lending list; and
- (f) Applicant organisations should clearly state in the agreement with their service users the lending policy (e.g. the length of lending period with justifications, the maximum number of products a service user/carer can borrow at any one time) and compensation policy for any damage or loss.

- 2.5.4 Payment of the I&T Fund grants for household use of technology products is usually made on a reimbursement basis. The approved applicant organisations should refer to and follow the procedures and terms stipulated in Section 2.4. The grants covering the 5% administrative overhead expenses will be released after SWD received a written confirmation from the approved organisations on the date of service commencement. °

2.6 Keeping Records of the I&T Fund Products

- 2.6.1 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 rented 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.
- 2.6.2 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 or procurement of the product, release of the final payment, disbursement of the final payment instalment 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 persons of the SWD and Audit Commission.

Chapter 3

Trial Use of Newly Developed Technology Products

3.1 Preamble

- 3.1.1 This Chapter sets out the rules and procedures for the application, the payment of grant and relevant administrative requirements with regard to the trial use of newly developed technology products.

3.2 Submission of Application

- 3.2.1 Applications for the I&T Fund grants under this Chapter are open all year round and should contain completed information and documents listed in the application form at **Annex 3.1** and addressed to the Secretariat to Innovation and Technology Fund for Application in Elderly and Rehabilitation Care of the SWD. 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 (preferably in Microsoft Word 2003 or above format stored in CD-ROM Disc or USB drive) and two original hard copies of the completed application form should be included in each I&T Fund application. Electronic applications can be submitted by completing the “E-Forms” in the SWD’s website (<https://www.swd.gov.hk/en/eservice/eform/>).

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 trial their newly developed technology products designed specifically for the care 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 customisation; and
- (b) newly developed products well-tested and suitable for deployment by applicant organisations after customisation within a reasonable time and cost.

The project should not include any research element and no research deliverables would be produced upon the end of the project.

3.3.2 Applications for approval of the I&T Fund have to satisfy the following principles –

- (a) the newly developed 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 newly developed 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 customisation and testing of the product(s) within a specific timeframe less than one year after the item is approved; 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 newly developed technology products for trial use subsidised by the Fund.

3.3.3 The ceiling for the I&T Fund grants under each application for the purpose of trial use of newly developed technology products is \$5 million. Parameter on grants 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 grants. The grants may cover the cost of

staff training on how to trial use the relevant newly developed 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 grants 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 grants 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 under any circumstances.
- 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 normally start the approved trial use project within three months 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 grants will be disbursed by instalments, on appropriate milestones/deliverables and subject to any other conditions attached to the approval of the grants. 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.
- 3.4.2 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.

- 3.4.3 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.
- 3.4.4 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 2.5**. Otherwise, a cheque will be issued to the organisation.
- 3.4.5 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.
- 3.4.6 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 grants paid to the approved applicant organisation.
- 3.4.7 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 grants 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 grants 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 instalment 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 persons 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. All the completed audited financial statement submitted should collectively cover the entire period of the trial project.

- 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 whether –

- (a) 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 paragraph 5.3.3 below, the quotation and tender value are as follows –

<u>Purchase value per case</u>	<u>Quotation or tender requirement</u>
(a) Not exceeding \$50,000 <i>(Verbal quotation supported by written explanation or written quotations should be invited.)</i>	More than one supplier should be invited for quotations.
(b) Over \$50,000 but not exceeding \$1,350,000 <i>(Written quotations should be invited)</i>	No less than five suppliers should be invited for quotations.
(c) Over \$1,350,000 <i>(Written tenders should be invited.)</i>	Tender procedures should be normally followed. Must conduct tendering

documents containing all requirements and specifications. Where a marking scheme is adopted for assessment of tenders, this should be drawn up before inviting tenders.

- 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 \$1,350,000 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 way, 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; and
- (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 \$1,350,000). 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 Checklist(s) for Non-Governmental Organisations, private companies or organisations issued by the Hong Kong Independent Commission Against Corruption (ICAC) from time to time. The Checklists are posted on the ICAC website.

Brief Description of the BPC on Procurement

https://cpas.icac.hk/EN/Info/Lib_List?cate_id=3&id=199

Brief Description of the BPC on Stores Management

https://cpas.icac.hk/EN/Info/Lib_List?cate_id=3&id=195

Brief Description of the BPC on Governance and Internal Control in Non-Governmental Organisations

https://cpas.icac.hk/UploadImages/InfoFile/cate_43/2016/208ec0bd-878e-4dc0-b755-c4a230b39bdd.pdf

- 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 labelled 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 Assets

5.9.1 An asset procured using the I&T Fund grants 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 re-allocated to other eligible elderly or rehabilitation service units of the approved applicant organisations for use;
 - (f) to be re-allocated to other eligible service units of the approved

applicant organisations, or to other charitable organisations for use;

- (g) to be re-allocated to other eligible service units of other approved applicant organisations for use (applicable to those applicant organisations operating one service unit or all service units would cease operation);
- (h) 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;
- (i) to be recycled by e-waste disposal licence holders if applicable; or
- (j) to be dumped.

5.9.5 Disposal of unserviceable or surplus items should be properly recorded in the inventory record. The approved applicant organisations might be required to provide written confirmation when re-allocating the items to others.

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).

樂齡及康復創科應用基金申請表格
(購置科技產品)

Innovation and Technology Fund for Application in Elderly and Rehabilitation Care (I&T Fund)
Application Form
(Procurement of Technology Product)

在填寫此份表格前，請仔細參閱載於附件 2.2(a) 的指引及《樂齡及康復創科應用基金手冊》。

Please study the Guidance Notes at **Annex 2.2(a)** and
the I&T Fund Manual carefully before you complete the form.

1. 申請機構和服務單位資料

Information of Applicant Organisation and Service Unit(s)

申請機構名稱

Name of Organisation

(須同時以中文和英文填寫)

Should be completed in both English and Chinese)

通訊地址

Correspondence address

(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

負責職員 Responsible staff

服務單位現正接受

社會福利署(社署)津助／資助

**Service unit(s) currently receiving subvention
or subsidies from the Social Welfare
Department (SWD)**

機構性質 Nature of organisation	
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- 現正接受社署津助／資助的非政府機構¹
Non-governmental organisation currently receiving subvention or subsidies from the SWD
- 現正接受社署資助的私營機構
Private organisation currently receiving subsidies from the SWD

註¹： 包括展亮技能發展中心（屯門）－ 宿舍部。

Note¹: Included the Shine Skills Centre (Tuen Mun) - Boarding Section.

申請性質 Nature of application	
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服務類別 ² Service type ²	
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註²： 每份申請表格只可涵蓋一種服務類別。

Note²: Each application should only cover one service type.

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 or donation received on the same applied 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 or donation received on the same applied technology product.
基金／捐款名稱：
Name of funding or donation:
基金／捐款性質：
Nature of funding or donation:
基金／捐款金額：
Amount of funding or donation:
- ☐ 政府 Governmental ☐ 非政府 Non-governmental
- 港幣 HK\$

3. 個人資料收集聲明

Personal Information Collection Statement

收集目的

Purposes of Collection

本表格所提供的機構及個人資料，會供社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 SWD for assessing your organisation's application for the I&T Fund 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 Sections 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 Director of Social Welfare

(經辦人：社會工作主任(樂齡及康復創科應用基金))

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

地址 Address：九龍深水埗元州街 290-296 號西岸國際大廈 5 樓 502 室

Room 502, 5/F, West Coast International Building, 290-296 Un Chau Street,
Sham Shui Po, Kowloon

電話 Phone：3106 2847

傳真 Fax：3188 2845

電郵 Email：rehabenq@swd.gov.hk

4. 聲明

Declaration

本人代表以下機構，並獲其正式授權，作出以下聲明：

I, on behalf of and duly authorised by the following 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，上述資料日後如有任何更改（特別是在本申請提交後，獲批予的社署的資助有所改動），會立即通知社署。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 SWD immediately if there are any subsequent changes to the above information (in particular, subsequent change in subsidy from the SWD 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 I&T Fund. 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;

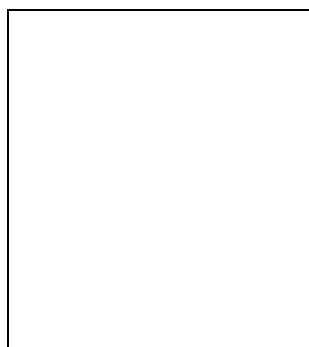
Annex 2.1(a)

- (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 or 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**附件 2.2(a)** 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 **Annex 2.2(a)** and the I&T Fund 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；及
the applicant organisation, its Board of Management, Head or staff does not have any ownership or share of ownership of the applied technology product; and
- (F) 若所需金額超過補助金上限，申請機構將以本身的資源承擔超出的金額。
if the requested amount exceeds the grant ceiling, the applicant organisation will undertake to bear the excessive amount by its own resources.

申請機構名稱

Name of Organisation

(請同時以中文和英文填寫 Please complete in both English and Chinese)



機構印章

Organisation Chop

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

機構首長簽署

Signature of agency head

(簽署 Signature)

機構首長姓名

Name of agency head

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

機構首長職位名稱

Post title of agency head

(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

日期

Date

購置的科技產品^{3 & 4}**Purchase of Technology Product^{3 & 4}**

- 註³：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。
- Note³: Please provide at least one **quotation and the product catalogue** with details including price details, specifications, certification and required operating professional.
- 註⁴：每份申請只可涵蓋一個產品或計劃。
- Note⁴: Each application should only cover one product or project.

申請產品一般資料 General Information of Application Product		
申請產品已納入《認可科技應用產品的參考清單》 Application product listed in the “Reference List of Recognised Technology Application Products” (是／否 Y/N)		
	如已納入，請註明項目編號 If “Y”, please specify the Item number : (如 1.1、2.1 e.g. 1.1, 2.1, etc.)	
產品名稱 Product name (須與報價單一致 Identical to quotation) (請同時以中文和英文填寫 Please complete in both English and Chinese)		
產品品牌 Brand name (須與報價單一致 Identical to quotation)		
產品型號 Model No. (須與報價單一致 Identical to quotation)		
產品規格 Specification (請參閱《認可科技應用產品的參考清單》的參考細節 Please refer to Reference Specification in the “Reference List of Recognised Technology Application Products”)		
證書 Certification(s) (如有，請註明並夾附 If any, please state and enclose)		

申請服務單位資料 Information of Applicant Service Unit(s)		
編號 No.	服務單位名稱 Name(s) of service unit (請同時以中文和英文填寫 Please complete in both English and Chinese)	服務單位類別 Type(s) of service unit (見附件 2.3 See Annex 2.3)
1		
2		
3		
4		
5		

申請產品數目及價格細項 Quantity and Price Details of Application Product					
以下資料須與報價單一致 The information stated below should be identical to quotation (如申請包含多間服務單位，請將金額按產品數量比例分配填寫 If the application includes multiple service units, please allocate the amount in proportion to the quantity of products)					
申請服務單位編號 Applicant service unit No.	1	2	3	4	5
產品數量 Quantity of product					
單價 (港幣) Unit rate (HK\$) (折扣後 Discounted)					
金額 (港幣) Amount (HK\$) (數量 × 單價 Quantity × unit rate)					
保養費用總數 (港幣) Total maintenance fee (HK\$)					
收費保養時期 (年) Period of maintenance paid (year) (不包括隨產品附送的保養年期 Exclude the free maintenance period provided)					
收費保養內容 Paid maintenance coverage (例如上門維修、人工，配件等 e.g. onsite maintenance, labour and parts etc.)					
員工使用產品訓練費用 (港幣) Staff training fee for using the product (HK\$)					
雜項費用 (港幣) Miscellaneous expense (HK\$)					
各服務單位申請金額 (港幣) Total amount applied by EACH service unit (HK\$) (包括產品購置及所有相關費用 Including procurement and all related fees)					
總申請金額 (港幣) Total amount applied (HK\$) (包括所有服務單位 Include ALL service units)					

申請產品其他事項 Other Information of Application Product					
預計產品可使用年期 (年) Expected sustainability of product (year)					
該產品需要專業人員操作 Professional(s) required to operate the product (是／否 Y/N)	如需，請註明專業人員類別 If "Y", please specify the type(s) of professional required :				
申請服務單位具備所需操作產品的專業人員 Professional(s) available on site to operate the product (是／否 Y/N)	申請服務單位編號 Applicant service unit No.				
	1	2	3	4	5
申請服務單位未有具備需操作產品的專業人員下的應對方案 Alternatives when a service unit does NOT have the professional(s) to operate the product as required (如適用 If applicable)					

申請產品其他事項 Other Information of Application Product	
產品受惠人類別和數目 Type(s) and number of beneficiaries of the product (請在適當的方格內加上「✓」號 Please “✓” as appropriate)	☐ 長者 (年齡 60 歲或以上) Elderly (aged 60 or above) _____人 person(s) ☐ 殘疾人士 Persons with disabilities (殘疾類別 Type(s) of disability : _____) _____人 person(s) ☐ 護理人員 Care staff _____人 person(s)
申請理據 Justification for application (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。 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.)	
申請機構／服務單位具備的經驗、能力和專業知識，以及供應商所提供的產品訓練詳情 The experience, ability and professional knowledge of the Applicant organisation/ service unit(s), and the training provided by the vendor (請說明申請機構／服務單位如何懂得運用相關申請產品。 Please elaborate how the Applicant organisation/ service unit(s) is/are able to operate the application product.)	

**樂齡及康復創科應用基金申請表格
(租用科技產品)**

**Innovation and Technology Fund for Application in Elderly and Rehabilitation Care (I&T Fund)
Application Form
(Rent of Technology Product)**

在填寫此份表格前，請仔細參閱載於**附件 2.2(a)** 的指引及《樂齡及康復創科應用基金手冊》。

Please study the Guidance Notes at **Annex 2.2(a)** and
the I&T Fund Manual carefully before you complete the form.

1. 申請機構和服務單位資料

Information of Applicant Organisation and Service Unit(s)

申請機構名稱

Name of Organisation

(須同時以中文和英文填寫)

Should be completed in both English and Chinese)

通訊地址

Correspondence address

(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

負責職員 Responsible staff

服務單位現正接受

社會福利署(社署)津助／資助

**Service unit(s) currently receiving subvention
or subsidies from the Social Welfare
Department (SWD)**

機構性質 Nature of organisation	
--------------------------------	--

- 現正接受社署津助／資助的非政府機構¹
Non-governmental organisation currently receiving subvention or subsidies from the SWD
- 現正接受社署資助的私營機構
Private organisation currently receiving subsidies from the SWD

註¹： 包括展亮技能發展中心（屯門）－ 宿舍部。

Note¹: Included the Shine Skills Centre (Tuen Mun) - Boarding Section.

申請性質 Nature of application	
-------------------------------	--

服務類別 ² Service type ²	
--	--

註²： 每份申請表格只可涵蓋一種服務類別。

Note²: Each application should only cover one service type.

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 or donation received on the same applied 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 or donation received on the same applied technology product.
基金／捐款名稱：
Name of funding or donation:
基金／捐款性質：
Nature of funding or donation:
基金／捐款金額：
Amount of funding or donation:
- ☐ 政府 Governmental ☐ 非政府 Non-governmental
- 港幣 HK\$

3. 個人資料收集聲明

Personal Information Collection Statement

收集目的

Purposes of Collection

本表格所提供的機構及個人資料，會供社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 SWD for assessing your organisation's application for the I&T Fund 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 Sections 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 Director of Social Welfare

(經辦人：社會工作主任(樂齡及康復創科應用基金))

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

地址 Address：九龍深水埗元州街 290-296 號西岸國際大廈 5 樓 502 室

Room 502, 5/F, West Coast International Building, 290-296 Un Chau Street,
Sham Shui Po, Kowloon

電話 Phone：3106 2847

傳真 Fax：3188 2845

電郵 Email：rehabenq@swd.gov.hk

4. 聲明

Declaration

本人代表以下機構，並獲其正式授權，作出以下聲明：

I, on behalf of and duly authorised by the following 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，上述資料日後如有任何更改（特別是在本申請提交後，獲批予的社署的資助有所改動），會立即通知社署。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 SWD immediately if there are any subsequent changes to the above information (in particular, subsequent change in subsidy from the SWD 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 I&T Fund. Making false declarations or withholding material

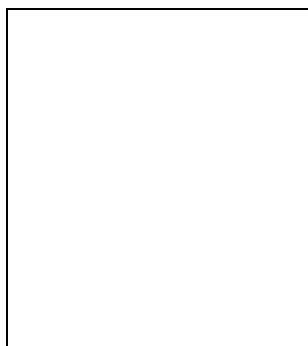
information may result in referral to law enforcement authorities.

- (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 or 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**附件 2.2(a)** 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 **Annex 2.2(a)** and the I&T Fund 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；及
the applicant organisation, its Board of Management, Head or staff does not have any ownership or share of ownership of the applied technology product; and
- (F) 若所需金額超過補助金上限，申請機構將以本身的資源承擔超出的金額。
if the requested amount exceeds the grant ceiling, the applicant organisation will undertake to bear the excessive amount by its own resources.

申請機構名稱

Name of Organisation

(請同時以中文和英文填寫 Please complete in both English and Chinese)



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

Name of agency head

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

機構首長職位名稱

Post title of agency head

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

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

電話號碼

Telephone number

日期

Date

租用的科技產品 ^{3 & 4}
Rental of Technology Product ^{3 & 4}

- 註³： 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。
 Note³: Please provide at least one quotation and the product catalogue with details including price details, specifications, certification and required operating professional.
 註⁴： 每份申請只可涵蓋一個產品或計劃。
 Note⁴: Each application should only cover one product or project.

申請產品一般資料 General Information of Application Product		
申請產品已納入《認可科技應用產品的參考清單》 Application product listed in the “Reference List of Recognised Technology Application Products” (是／否 Y/N)	如已納入，請註明項目編號 If “Y”, please specify the Item number : (如 1.1、2.1 e.g. 1.1, 2.1, etc.)	按一下這裡以輸入文字。 Click here to enter.
產品名稱 Product name (須與報價單一致 Identical to quotation) (請同時以中文和英文填寫 Please complete in both English and Chinese)		
產品品牌 Brand name (須與報價單一致 Identical to quotation)		
產品型號 Model No. (須與報價單一致 Identical to quotation)		
產品規格 Specification (請參閱《認可科技應用產品的參考清單》的參考細節 Please refer to Reference Specification in the “Reference List of Recognised Technology Application Products”)		
證書 Certification(s) (如有，請註明並夾附 If any, please state and enclose)		

申請服務單位資料 Information of Applicant Service Unit(s)		
編號 No.	服務單位名稱 Name(s) of service unit (請同時以中文和英文填寫 Please complete in both English and Chinese)	服務單位類別 Type(s) of service unit (見附件 2.3 See Annex 2.3)
1		
2		
3		
4		
5		

租用時段 Period of Rental	
預計開始租用日期 Planned rental commencement date	
預計結束租用日期 Planned rental termination date	
總租用時期（月） Total rental period (Month(s))	

申請產品數目及價格細項 Quantity and Price Details of Application Product					
以下資料須與報價單一致 The information stated below should be identical to quotation （如申請包含多間服務單位，請將金額按產品數量比例分配填寫 If the application includes multiple service units, please allocate the amount in proportion to the quantity of products）					
申請服務單位編號 Applicant service unit No.	1	2	3	4	5
產品／使用者數量 Quantity of product or number of service user					
每件產品／每位使用者每月租金（港幣） Monthly rent per product or service user (HK\$) （折扣後 Discounted）					
每月總租金（港幣） Total Amount of monthly rent (HK\$) （數量 × 每件產品／每位使用者每月租金 Quantity × Monthly rent per product or service user）					
保養費用總數（港幣） Total maintenance fee (HK\$)					
收費保養時期（年） Period of maintenance paid (year) （不包括隨產品附送的保養年期 Exclude the free maintenance period provided）					
收費保養內容 Paid maintenance coverage （例如上門維修、人工，配件等 e.g. onsite maintenance, labour and parts etc.）					
員工使用產品訓練費用（港幣） Staff training fee for using the product (HK\$)					
雜項費用（港幣） Miscellaneous expense (HK\$)					
各服務單位申請金額（港幣） Total amount applied by EACH service unit (HK\$) （包括產品購置及所有相關費用 Including procurement and all related fees）					
申請款額比例分配（%） Distribution of amount applied (%) （佔總申請金額 In proportion to the total amount requested）					
總申請金額（港幣） Total amount applied (HK\$) （包括所有服務單位 Include ALL service units）					

申請產品其他事項 Other Information of Application Product					
該產品需要專業人員操作 Professional(s) required to operate the product (是／否 Y/N)					
	如需，請註明專業人員類別 If “Y”, please specify the type(s) of professional required :				
申請服務單位具備所需操作產品的專業人員 Professional(s) available on site to operate the product (是／否 Y/N)	申請服務單位編號 Applicant service unit No.				
	1	2	3	4	5
申請服務單位未有具備需操作產品的專業人員下的應對方案 Alternatives when a service unit does NOT have the professional(s) to operate the product as required (如適用 If applicable)					
產品受惠人類別和數目 Type(s) and number of beneficiaries of the product (請在適當的方格內加上「✓」號 Please “✓” as appropriate)	☐ 長者 (年齡 60 歲或以上) Elderly (aged 60 or above) _____人 person(s) ☐ 殘疾人士 Persons with disabilities (殘疾類別 Type(s) of disability : _____) _____人 person(s) ☐ 護理人員 Care staff _____人 person(s)				
申請理據 Justification for application (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。 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.)					
申請機構／服務單位具備的經驗、能力和專業知識，以及供應商所提供的產品訓練詳情 The experience, ability and professional knowledge of the Applicant organisation/ service unit(s), and the training provided by the vendor (請說明申請機構／服務單位如何懂得運用相關申請產品。 Please elaborate how the Applicant organisation/ service unit(s) is/are able to operate the application product.)					

樂齡及康復創科應用基金申請表格
(借出創科產品予長者、殘疾人士及其照顧者居家使用)
Innovation and Technology Fund for Application in Elderly and Rehabilitation Care (I&T Fund)
Application Form
(Lending I&T Fund Products to Elderly Persons, Persons with Disabilities and Carers
for Use at Home)

在填寫此份表格前，請仔細參閱載於**附件 2.2(b)** 的指引及《樂齡及康復創科應用基金手冊》。

Please study the Guidance Notes at **Annex 2.2(b)** and
the I&T Fund Manual carefully before you complete the form.

1. 申請機構和服務單位資料

Information of Applicant Organisation and Service Unit(s)

服務類別 Service type

(每宗申請只能涵蓋一類服務

Each application can only consist of one service type)

申請性質 Nature of application

申請機構名稱 Name of Organisation

(須同時以中文和英文填寫

Should be completed in both English and Chinese)

通訊地址 Correspondence address

(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

負責職員 Responsible staff

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 or donation received on the same applied 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 or donation received on the same applied technology product.
基金／捐款名稱：
Name of funding or donation:
基金／捐款性質：☐ 政府 Governmental ☐ 非政府 Non-governmental
Nature of funding or donation:
基金／捐款金額： 港幣 HK\$
Amount of funding or donation:

3. 個人資料收集聲明

Personal Information Collection Statement

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（社署）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 (SWD) for assessing your organisation's application for the I&T Fund 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 Sections 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 Director of Social Welfare

（經辦人：社會工作主任（樂齡及康復創科應用基金））

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

地址 Address：九龍深水埗元州街 290-296 號西岸國際大廈 5 樓 502 室
Room 502, 5/F, West Coast International Building, 290-296 Un Chau Street,
Sham Shui Po, Kowloon

電話 Phone：3106 2847

傳真 Fax：3188 2845

電郵 Email：rehabenq@swd.gov.hk

4. 聲明
Declaration

本人代表以下機構，並獲其正式授權，作出以下聲明：

I, on behalf of and duly authorised by the following organisation, declare that –

- (G) 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，上述資料日後如有任何更改（特別是在本申請提交後，獲批予的社署的資助有所改動），會立即通知社署。如填報資料不確，申請將被視為無效，同時，社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 SWD immediately if there are any subsequent changes to the above information (in particular, subsequent change in subsidy from the SWD 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 I&T Fund. Making false declarations or withholding material information may result in referral to law enforcement authorities.

- (H) 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，並監察其過程；
utmost dedication and determination will be given to complete and monitor according to the approved terms of this application if the application is approved;

- (I) 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 or 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;

- (J) 本人在填寫此份表格時已經仔細參閱載於**附件 2.2(b)** 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 **Annex 2.2(b)** and the I&T Fund Manual carefully before completing this form and have also enclosed all the supporting documents required;

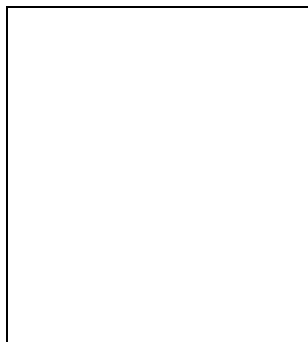
Annex 2.1(c)

- (K) 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；及
the applicant organisation, its Board of Management, Head or staff does not have any ownership or share of ownership of the applied technology product; and
- (L) 若所需金額超過補助金上限，申請機構將以本身的資源承擔超出的金額。
if the requested amount exceeds the grant ceiling, the applicant organisation will undertake to bear the excessive amount by its own resources.

申請機構名稱

Name of Organisation

(請同時以中文和英文填寫 Please complete in both English and Chinese)



機構印章

Organisation Chop

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

機構首長簽署

Signature of agency head

(簽署 Signature)

機構首長姓名

Name of agency head

(請同時以中文和英文填寫 Please complete in both English and Chinese)

機構首長職位名稱

Post title of agency head

(請同時以中文和英文填寫 Please complete in both English and Chinese)

電話號碼

Telephone number

日期

Date

購置作借出在家使用的創科產品
Procurement of I&T Fund Product for Use at Home

申請產品一般資料 General Information of Application Product	
產品名稱 Product name (須與報價單一致 Identical to quotation) (請同時以中文和英文填寫 Please complete in both English and Chinese)	
產品品牌 Brand name (須與報價單一致 Identical to quotation)	
產品型號 Model No. (須與報價單一致 Identical to quotation)	
產品規格 Specification	
證書 Certification(s) (如有，請註明並夾附 If any, please state and enclose)	
總產品數量 Total quantity of product (包括所有服務單位 Include ALL service units)	

借用項目價格細項 Price Details of Lending Project	
以下資料須與報價單一致 The information stated below should be identical to quotation	
產品單價 Product unit rate (折扣後 Discounted)	港幣 HK\$
產品金額 Amount (產品數量 × 產品單價 Quantity × product unit rate)	港幣 HK\$
產品保養費用總數 Total product maintenance fee	港幣 HK\$
產品收費保養時期 Period of paid maintenance for product (不包括隨產品附送的保養年期 Exclude the free maintenance period provided)	年 Year(s)
產品收費保養內容 Paid product maintenance coverage (例如上門維修、人工，配件等 e.g. onsite maintenance, labour and parts etc.)	
員工使用產品訓練費用 Staff training fee for using the product	港幣 HK\$

借用項目價格細項 Price Details of Lending Project	
產品雜項費用 Miscellaneous expense for product	港幣 HK\$
行政費用 Administrative overhead expense (上限為項目總成本的 5% Capped at 5% of the total product cost)	港幣 HK\$
總申請金額 Total amount applied (包括所有服務單位 Include ALL service units)	港幣 HK\$

申請產品其他事項 Other Information of Application Product	
預計產品可使用年期 Expected sustainability of product	年 Year(s)
該產品需要專業人員操作 Professional(s) required to operate the product (是／否 Y/N)	如需，請註明專業人員類別 If “Y”, please specify the type(s) of professional required :
申請服務單位具備所需操作產品的專業人員 Professional(s) available on site to operate the product (是／否 Y/N)	
產品受惠人類別和數目 Type(s) and number of beneficiaries of the product (請在適當的方格內加上「✓」號 Please “✓” as appropriate)	長者 (年齡 60 歲或以上) ☐ Elderly (aged 60 or above) _____人 person(s) 殘疾人士 Persons with disabilities ☐ (殘疾類別 Type(s) of disability : _____) _____人 person(s) 護理人員 ☐ Care staff _____人 person(s)

提供借用服務的服務單位 Service Unit(s) Providing Lending Service			
如服務單位數目超過 5 間，請另行加行填寫，並清楚標示服務單位編號 In case the number of applicant service unit exceeds 5, please insert new row(s) and state clearly the Applicant service unit “No.”.			
編號 No.	服務單位名稱 Name(s) of service unit (須同時以中文和英文填寫 Should be completed in both English and Chinese)	服務單位類別 Type(s) of service unit (見附件 2.3 See Annex 2.3)	產品數量 Quantity of product
1			
2			
3			
4			
5			
各服務單位合作的安排和詳情 The details and arrangement of the collaboration between different service units (例如各服務單位肩負的責任 e.g. the responsibilities of each service unit) (適用於涉及多於一間服務單位的申請 Applicable to application involving more than one service units)			

借用創科產品的運作 Operation of Lending	
如何利用該產品幫助申請服務單位的服務使用者康復／改善服務使用者（及／或其照顧者）的生活質素 How the product under lending can facilitate the rehabilitation or improve quality of life of service users and/or their carers	
如何利用該產品紓緩照顧者的照顧壓力 How the product under lending can alleviate care stress of carers	
借用產品服務安排 Arrangement for the provision of lending service （包括但不限於借用流程、時限及每次可借用產品數量上限 Including but not limited to the operation flow, time period and the maximum number of products to be lent to one service users at any one time）	
申請服務單位之專業人員如何評估及推薦服務使用者是否適合借用該產品 How in-house professionals conduct assessment on the service user's suitability for borrowing the product and make recommendations on suitable technology products	
申請服務單位為服務使用者（及／或其照顧者）在借用該產品前提供之訓練 Training provided by the service unit(s) to the service users and/or carers before borrowing the product	

借用創科產品的運作 Operation of Lending	
申請服務單位為服務使用者（及／或其照顧者）在借用該產品後之支援服務 Support service(s) provided by the service unit(s) （如實地支援、定期檢視服務使用者／照顧者之需要等 Such as on-site support, regular case review and adjustment made to meet the changing needs of service users and carers）	
借用服務之其他安排 Description of other lending service arrangements （包括按金（如有）、保險、損壞／遺失賠償等 Including details such as issues of deposit (if any), insurance and compensation policy for damage/loss etc.）	
產品之相關清潔及運送安排 Cleaning and delivery arrangement （如適用 If applicable）	
申請服務單位如何收集服務使用者（及／或其照顧者）對借用該產品之意見 Mean(s) to collect feedback from service users and/or carers （請附上相關問卷／調查表的範本 Please enclose a template of the questionnaire / survey）	

樂齡及康復創科應用基金申請表格
(借出創科產品予長者、殘疾人士及其照顧者居家使用 – 跨機構聯合申請)
Innovation and Technology Fund for Application in Elderly and Rehabilitation Care (I&T Fund)
Application Form
(Lending I&T Fund Products to Elderly Persons, Persons with Disabilities and Carers
for Use at Home – Joint Application by Multiple Organisations)

在填寫此份表格前，請仔細參閱載於**附件 2.2(b)** 的指引及《樂齡及康復創科應用基金手冊》。

Please study the Guidance Notes at **Annex 2.2(b)** and
the I&T Fund Manual carefully before you complete the form.

1. 申請機構和服務單位資料
Information of Applicant Organisation and Service Unit(s)

申請機構數目 Number of Applicant Organisation

服務類別 Service type

(每宗申請只能涵蓋一類服務)

Each application can only consist of one service type)

申請統籌機構 (機構編號：1) Lead Applicant Organisation (Organisation S/N: 1)

(此機構將負責遞交申請並作為單一代表與政府聯絡及處理有關此申請的一切事宜，包括但不限於收取就此申請所獲批發放的全部補助金。This applicant organisation will act as the sole representative in the communication with the government and to handle any matters arising from the application, including but not limited to receiving the full amount of grants approved for the application)

申請機構名稱 Name of Organisation

(須同時以中文和英文填寫)

should be completed in both English and Chinese)

通訊地址 Correspondence address

(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

負責職員 Responsible staff

聯合申請機構（機構編號：_） Joint Applicant Organisation (Organisation S/N: _)

（請填上申請機構編號，如 2, 3, ...，並為額外機構加行填寫 Please provide a serial number for each applicant organisation, e.g. 2, 3, ..., and insert row(s) for additional organisation(s)）

申請機構名稱 Name of Organisation

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

通訊地址 Correspondence address

（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****負責職員 Responsible staff****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 or donation received on the same applied 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 or donation received on the same applied technology product.
基金／捐款名稱：
Name of funding or donation:
基金／捐款性質：☐ 政府 Governmental ☐ 非政府 Non-governmental
Nature of funding or donation:
基金／捐款金額：港幣 HK\$
Amount of funding or donation:

3. 個人資料收集聲明**Personal Information Collection Statement**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（社署）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 (SWD) for assessing your organisation's application for the I&T Fund 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

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以及評審委員會等有關單位作上文所述的用途。

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You have a right of access and correction with respect to personal data as provided for in Sections 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 Director of Social Welfare

(經辦人：社會工作主任(樂齡及康復創科應用基金))

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

地址 Address：九龍深水埗元州街 290-296 號西岸國際大廈 5 樓 502 室

Room 502, 5/F, West Coast International Building, 290-296 Un Chau Street,
Sham Shui Po, Kowloon

電話 Phone：3106 2847

傳真 Fax：3188 2845

電郵 Email：rehabenq@swd.gov.hk

4. 聲明

Declaration

本人代表上述各申請機構，並獲其正式授權，作出以下聲明：

I, on behalf of and duly authorised by the organisations above, declare that –

(M) 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，上述資料日後如有任何更改（特別是在本申請提交後，獲批予的社署的資助有所改動），會立即通知社署。如填報資料不確，申請將被視為無效，同時，社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 SWD immediately if there are any subsequent changes to the above information (in particular, subsequent change in subsidy from the SWD 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 I&T Fund. Making false declarations or withholding material information may result in referral to law enforcement authorities.

(N) 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，並監察其過程；

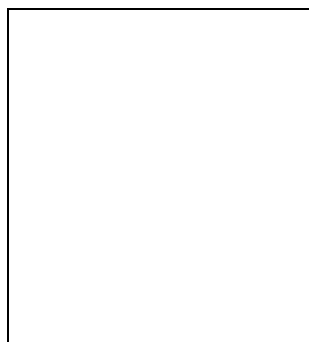
utmost dedication and determination will be given to complete and monitor according to the approved terms of this application if the application is approved;

- (O) 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 or 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;
- (P) 本人在填寫此份表格時已經仔細參閱載於**附件 2.2(b)** 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 **Annex 2.2(b)** and the I&T Fund Manual carefully before completing this form and have also enclosed all the supporting documents required;
- (Q) 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；及
the applicant organisation, its Board of Management, Head or staff does not have any ownership or share of ownership of the applied technology product; and
- (R) 若所需金額超過補助金上限，申請機構將以本身的資源承擔超出的金額。
if the requested amount exceeds the grant ceiling, the applicant organisation will undertake to bear the excessive amount by its own resources.

申請統籌機構名稱

Name of Lead Applicant Organisation

(請同時以中文和英文填寫 Please complete in both English and Chinese)



機構印章

Organisation Chop

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

機構首長簽署

Signature of agency head

(簽署 Signature)

機構首長姓名

Name of agency head

(請同時以中文和英文填寫 Please complete in both English and Chinese)

機構首長職位名稱

Post title of agency head

(請同時以中文和英文填寫 Please complete in both English and Chinese)

電話號碼

Telephone number

日期

Date

只需由申請統籌機構填寫及簽署

To be Completed and Signed by the Lead Applicant Organisation ONLY

購置作借出在家使用的創科產品
Procurement of I&T Fund Product for Use at Home

申請產品一般資料 General Information of Application Product	
產品名稱 Product name (須與報價單一致 Identical to quotation) (請同時以中文和英文填寫 Please complete in both English and Chinese)	
產品品牌 Brand name (須與報價單一致 Identical to quotation)	
產品型號 Model No. (須與報價單一致 Identical to quotation)	
產品規格 Specification	
證書 Certification(s) (如有，請註明並夾附 If any, please state and enclose)	
總產品數量 Total quantity of product (包括所有服務單位 Include ALL service units)	

借用項目價格細項 Price Details of Lending Project	
以下資料須與報價單一致 The information stated below should be identical to quotation	
產品單價 Product unit rate (折扣後 Discounted)	港幣 HK\$
產品金額 Amount (產品數量 × 產品單價 Quantity × product unit rate)	港幣 HK\$
產品保養費用總數 Total product maintenance fee	港幣 HK\$
產品收費保養時期 Period of paid maintenance for product (不包括隨產品附送的保養年期 Exclude the free maintenance period provided)	
產品收費保養內容 Paid product maintenance coverage (例如上門維修、人工，配件等 e.g. onsite maintenance, labour and parts etc.)	
員工使用產品訓練費用 Staff training fee for using the product	港幣 HK\$

借用項目價格細項 Price Details of Lending Project	
產品雜項費用 Miscellaneous expense for product	港幣 HK\$
行政費用 Administrative overhead expense (上限為項目總成本的 5% Capped at 5% of the total product cost)	港幣 HK\$
總申請金額 Total amount applied (包括所有服務單位 Include ALL service units)	港幣 HK\$

申請產品其他事項 Other Information of Application Product	
預計產品可使用年期 Expected sustainability of product	年 Year(s)
該產品需要專業人員操作 Professional(s) required to operate the product (是／否 Y/N)	如需，請註明專業人員類別 If “Y”, please specify the type(s) of professional required :
申請服務單位具備所需操作產品的專業人員 Professional(s) available on site to operate the product (是／否 Y/N)	
產品受惠人類別和數目 Type(s) and number of beneficiaries of the product (請在適當的方格內加上「✓」號 Please “✓” as appropriate)	長者 (年齡 60 歲或以上) ☐ Elderly (aged 60 or above) _____人 person(s) 殘疾人士 Persons with disabilities ☐ (殘疾類別 Type(s) of disability : _____) _____人 person(s) 護理人員 ☐ Care staff _____人 person(s)

提供借用服務的服務單位 Service Unit(s) Providing Lending Service				
如服務單位數目超過 5 間，請另行加行填寫，並清楚標示服務單位編號 In case the number of applicant service unit exceeds 5, please insert new row(s) and state clearly the Applicant service unit “No.”.				
編號 No.	服務單位名稱 Name(s) of service unit (須同時以中文和英文填寫 Should be completed in both English and Chinese)	隸屬申請機構編號 (i.e. 1, 2, 3, ...) S/N of affiliated applicant organisation (請按第一部分填寫 Please refer to Section 1)	服務單位類別 Type(s) of service unit (見附件 2.3 See Annex 2.3)	產品數量 Quantity of product
1				
2				
3				
4				
5				
各申請機構及服務單位合作的安排和詳情 The details and arrangement of the collaboration between different applicant organisations and service units (例如各申請機構及服務單位肩負的責任 e.g. the responsibilities of each organisation and service unit)				

借用創科產品的運作 Operation of Lending	
如何利用該產品幫助申請服務單位的服務使用者康復／改善服務使用者（及／或其照顧者）的生活質素 How the product under lending can facilitate the rehabilitation or improve quality of life of service users and/or their carers	
如何利用該產品紓緩照顧者的照顧壓力 How the product under lending can alleviate care stress of carers	
借用產品服務安排 Arrangement for the provision of lending service （包括但不限於借用流程、時限及每次可借用產品數量上限 Including but not limited to the operation flow, time period and the maximum number of products to be lent to one service users at any one time）	
申請服務單位之專業人員如何評估及推薦服務使用者是否適合借用該產品 How in-house professionals conduct assessment on the service user's suitability for borrowing the product and make recommendations on suitable technology products	
申請服務單位為服務使用者（及／或其照顧者）在借用該產品前提供之訓練 Training provided by the service unit(s) to the service users and/or carers before borrowing the product	

借用創科產品的運作 Operation of Lending	
申請服務單位為服務使用者（及／或其照顧者）在借用該產品後之支援服務 Support service(s) provided by the service unit(s) （如實地支援、定期檢視服務使用者／照顧者之需要等 Such as on-site support, regular case review and adjustment made to meet the changing needs of service users and carers）	
借用服務之其他安排 Description of other lending service arrangements （包括按金（如有）、保險、損壞／遺失賠償等 Including details such as issues of deposit (if any), insurance and compensation policy for damage/loss etc.）	
產品之相關清潔及運送安排 Cleaning and delivery arrangement （如適用 If applicable）	
申請服務單位如何收集服務使用者（及／或其照顧者）對借用服務及借用該產品之意見 Mean(s) to collect feedback from service users and/or carers on the lending service and product （請附上相關問卷／調查表的範本 Please enclose a template of the questionnaire / survey）	

樂齡及康復創科應用基金
借出創科產品予長者、殘疾人士及其照顧者居家使用
- 跨機構聯合申請

Innovation and Technology Fund for Application in Elderly and Rehabilitation Care (I&T Fund)
Lending I&T Fund Products to Elderly Persons, Persons with Disabilities and Carers
for Use at Home –
Joint Application by Multiple Organisations

同意聲明書
Declaration of Consent Form

在填寫此份同意書前，請先與申請統籌機構在內其餘聯合申請機構協商並同意計劃下合作的安排及詳情，並細閱申請統籌機構填妥的聯合申請表格、載於**附件 2.2(b)** 的申請指引及《樂齡及康復創科應用基金手冊》。

Please consult with the remaining joint applicant organisation(s), including the lead applicant organisation, and reached consensus over the details and arrangement of the collaboration between different applicant organisations, and study the Guidance Notes for application at **Annex 2.2(b)** and the I&T Fund Manual carefully before completing the form.

1. 個人資料收集聲明

Personal Information Collection Statement

收集目的

Purposes of Collection

本聲明書所提供的機構及個人資料，會供社會福利署（社署）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 (SWD) for assessing your organisation's application for the I&T Fund 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

在本聲明書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聲明書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 Sections 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

與本聲明書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 Director of Social Welfare

（經辦人：社會工作主任（樂齡及康復創科應用基金））

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

地址 Address：九龍深水埗元州街 290-296 號西岸國際大廈 5 樓 502 室
Room 502, 5/F, West Coast International Building, 290-296 Un Chau Street,
Sham Shui Po, Kowloon

電話 Phone：3106 2847

傳真 Fax：3188 2845

電郵 Email：rehabenq@swd.gov.hk

2. 聲明
Declaration

本人代表，並獲其正式授權，作出以下聲明：
I, on behalf of and duly authorised by, declare that –

- (A) 本聲明書、相關申請表格及夾附於相關申請表格的資料，均屬真實無誤，並反映截至提交申請當日的真實情況。本人等承諾，上述資料日後如有任何更改（特別是在本申請提交後，獲批予的社署的資助有所改動），會立即通知社署。如填報資料不確，申請將被視為無效，同時，社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 form, the related Application Form as well as the accompanying information attached with the Application Form are true and accurate and reflect the status of affairs as at the date of submission. We undertake to inform the SWD immediately if there are any subsequent changes to the above information (in particular, subsequent change in subsidy from the SWD 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 I&T Fund. Making false declarations or withholding material information may result in referral to law enforcement authorities.
- (B) 如本聲明書相關申請獲得批准，承諾會竭盡所能，按照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 the application related to this form if the application is approved;
- (C) 申請機構已通知本聲明書相關申請有關的所有人士及機構，政府可使用本聲明書內的個人資料以審批相關申請、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 and parties concerned in the application related to this form of the Government's right to the use of their personal data contained in this form to process the application, discharge statutory duties, conduct research or surveys, monitor and review the handling of the application and prepare statistics;
- (D) 本人在填寫此份聲明書時已經與申請統籌機構在內其餘聯合申請機構協商並同意計劃下合作的安排及詳情，並細閱申請統籌機構填妥的聯合申請表格（附件 2.1(d)）、載於附件 2.2(b) 的申請指引及《樂齡及康復創科應用基金手冊》。同時，亦已在申請表格附上所有需要的有關文件以供審閱；

Annex 2.1(e)

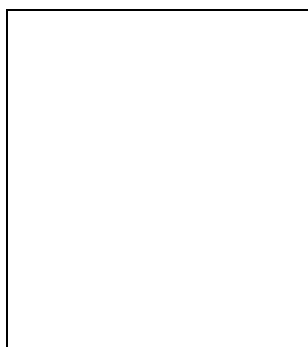
I have consulted with the other joint applicant organisation(s), including the lead applicant organisation, and reached consensus over the details and arrangement of the collaboration between different applicant organisation(s), and study the Joint Application Form completed by the lead applicant organisation (Annex 2.1(d)), the Guidance Notes for application at Annex 2.2(b) and the I&T Fund Manual carefully before completing this form and have also enclosed all the supporting documents required with the Application Form;

- (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 Boards of Management, Heads or staff does not have any ownership or share of ownership of the applied technology product;
- (F) 若所需金額超過補助金上限，申請機構將以本身的資源承擔超出的金額；
if the requested amount exceeds the grant ceiling, the applicant organisation will undertake to bear the excessive amount by its own resources;
- (G) 各申請機構均同意遞交相關申請，以及就相關申請表及其夾附文件所列申請項目承擔共同責任；
及
all applicant organisations have indicated their consent to submit the related application, and bear joint responsibilities for the application items listed in the application form and its attached documents; and
- (H) 授權 按此輸入申請統籌機構名稱。作為申請統籌機構及單一代表提交申請，並與政府聯絡及處理有關申請的一切事宜，包括但不限於收取就申請所獲批發放的全部補助金。政府在任何情況下並不會就申請機構間潛在或發生的任何糾紛承擔任何責任。
authorise **Click here to enter Name of Lead Applicant Organisation.** as the lead applicant organisation and the sole representative in the communication with the government and to handle any matters arising from the application, including but not limited to receiving the full amount of grants approved for the application. The government does not in any circumstances accept any responsibility or liability for any potential disputes or disputes arising from between the applicant organisations.

申請機構名稱

Name of Applicant Organisation

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



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

Name of agency head

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

機構首長職位名稱

Post title of agency head

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

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

電話號碼

Telephone number

日期

Date

樂齡及康復創科應用基金
Innovation and Technology Fund for Application in Elderly and Rehabilitation Care (I&T Fund)

調撥資助額通知書
Notification Form of Virement

在填寫此份通知書前，請先確認有關服務單位剩餘之補助金，
並細閱《樂齡及康復創科應用基金手冊》及載於其**附件 2.2(a)**之填寫指引。
Please confirm the remaining balance(s) of grants of the service units concerned,
and study the I&T Fund Manual and the Guidance Note at its **Annex 2.2(a)** carefully
before completing the notification form.

1. 機構和服務單位資料

Information of Organisation and Service Unit(s)

服務類別 Service type

(每份通知書只能涵蓋一類服務)
Each form can only consist of one service type)

機構名稱 Name of Organisation

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

通訊地址 Correspondence address

(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

負責職員 Responsible staff

調撥資助額之服務單位 Service Units Involved in Virement of Grants（如有需要，請加行填寫 Please insert additional row(s) if necessary） ³				
由 From		至 To		調撥額 Amount to be Redeployed
服務單位名稱 Name(s) of service unit （須同時以中文和英文填寫 Should be completed in both English and Chinese）	服務單位類別 Type(s) of service unit （見附件 2.3 See Annex 2.3）	服務單位名稱 Name(s) of service unit （須同時以中文和英文填寫 Should be completed in both English and Chinese）	服務單位類別 Type(s) of service unit （見附件 2.3 See Annex 2.3）	
				港幣 HK\$
				港幣 HK\$
				港幣 HK\$
				港幣 HK\$
				港幣 HK\$

³ 若調撥通知不獲接納，而引致有關服務單位因而未有足夠資助額購置／租用科技產品，相關服務單位須以本身的資源承擔超出的金額，有關申請才會獲得考慮。
If the notification of virement is not accepted and the concerned service units do not have sufficient grant for the procurement or rental of technology product, the concerned service units shall undertake to bear the excessive amount by their own resources before the application will be considered.

2. 個人資料收集聲明

Personal Information Collection Statement

收集目的

Purposes of Collection

本通知書所提供的機構及個人資料，會供社會福利署（社署）用以處理貴機構的「樂齡及康復創科應用基金」調撥資助額，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申請。

The personal data provided by means of this form will be used by the Social Welfare Department (SWD) for processing your organisation's virement of grants of the I&T Fund 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

在本通知書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通知書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 Sections 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

與本通知書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 Director of Social Welfare

（經辦人：社會工作主任（樂齡及康復創科應用基金））

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

地址 Address：九龍深水埗元州街 290-296 號西岸國際大廈 5 樓 502 室

Room 502, 5/F, West Coast International Building, 290-296 Un Chau Street,
Sham Shui Po, Kowloon

電話 Phone：3106 2847

傳真 Fax：3188 2845

電郵 Email：rehabenq@swd.gov.hk

3. 聲明

Declaration

本人代表以下機構，並獲其正式授權，作出以下聲明：

I, on behalf of and duly authorised by the following organisation, declare that –

(A) 本通知書內的資料，均屬真實無誤，並反映截至提交通知書當日的真實情況。本人承諾，上述資料日後如有任何更改，會立即通知社署。如填報資料不確，通知書將被視為無效。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 notification are true and accurate and reflect the status of affairs as at the date of submission. I undertake to inform the SWD immediately if there are any subsequent changes to the above information. Any inaccurate information will make the notification invalid. Making false declarations or withholding material information may result in referral to law enforcement authorities.

(B) 機構已通知與本通知書有關的所有人士及服務單位，政府可使用本通知書內的個人資料以處理相關調撥、履行法定職責、進行有關研究及調查、監察和檢討本調撥的處理及整理統計數字；
the applicant organisation has informed all individuals and service units concerned related to this notification of the Government's right to the use of their personal data contained in this notification to process the application, discharge statutory duties, conduct research or surveys, monitor and review the handling of the virement and prepare statistics;

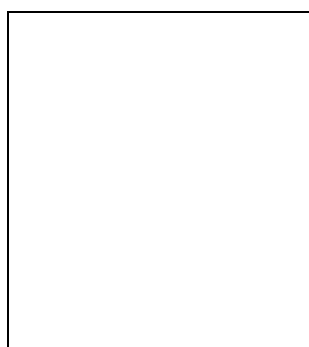
(C) 本人確認相關服務單位剩餘之補助金足以支持調撥，並已在填寫本通知書前細閱《樂齡及康復創科應用基金手冊》及載於其附件 2.2(a) 之填寫指引。
I confirm that the remaining balance(s) of grants of service unit(s) concerned is/are sufficient to support the virement and have studied the I&T Fund Manual and the Guidance Note at its Annex 2.2(a) carefully before completing this form.

(D) 在接獲社署的認收通知、表明相關調撥資助額通知已獲社署接納前，本人不會視已成功調撥相關資助額。
I shall not consider the grants to be successfully redeployed before receipt of acknowledgement and acceptance of the notification from the SWD.

申請機構名稱

Name of Organisation

(請同時以中文和英文填寫 Please complete in both English and Chinese)



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

Name of agency head

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

機構首長職位名稱

Post title of agency head

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

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

電話號碼

Telephone number

日期

Date

認收回條
Acknowledgement Receipt

致：機構首長
To: Agency Head

**樂齡及康復創科應用基金
調撥資助額通知**
**Notification of Virement for the
Innovation and Technology Fund for Application in Elderly
and Rehabilitation Care (I&T Fund)**

貴機構在_____年____月____日遞交之調撥資助額通知書收悉。

This is to acknowledge receipt of your organisation's notification form of virement dated _____.

2. 貴機構就轄下 *康復／安老 服務單位調撥資助額之通知：

Your organisation's notification of virement among your *rehabilitation / elderly service units –

☐ 已獲全數接納。

has been wholly accepted.

☐ 由於秘書處未有於指定限期前接獲修訂後的通知書，故未能落實調撥安排¹。

is unable to confirm as no submission of revised notification form is received by the Secretariat before the specific deadline¹.

3. 如有任何查詢，請致電_____與負責職員聯絡。

Should you have any enquiries, please contact the responsible officer at _____.

樂齡及康復創科應用基金秘書處
Secretariat to Innovation and
Technology Fund for Application in
Elderly and Rehabilitation Care

日期：

Date: _____

*請刪除不適用者。Please delete as appropriate.

註 Note

¹ 若調撥通知不獲接納，而引致有關服務單位因而未有足夠資助額購置／租用科技產品，相關服務單位須以本身的資源承擔超出的金額，有關申請才會獲得考慮。

If the notification of virement is not accepted and the concerned service units do not have sufficient grant for the procurement or rental of technology product, the concerned service units shall undertake to bear the excessive amount by their own resources before the application will be considered.

樂齡及康復創科應用基金（基金）申請表格
（購置／租用科技產品）
填寫指引

Guidance Notes on Completing
Innovation and Technology Fund for Application in Elderly and Rehabilitation Care
(I&T Fund) Application Form
(Procurement / Rental of 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（社署）網頁：公共服務 → 康復服務 → 特定基金／特殊需要信託／經濟援助 → 樂齡及康復創科應用基金，或網址 https://www.swd.gov.hk/en/pubsvc/rehab/cat_fundtrustfinaid/itfund/）。
 Before you lodge an application for the I&T Fund with the application form, please study the I&T Fund Manual (available at Social Welfare Department (SWD)'s website: Public Services → Rehabilitation Services → Funds for Specific Groups / Special Needs Trust / Financial Assistance → Innovation and Technology Fund for Application in Elderly and Rehabilitation Care, or website at https://www.swd.gov.hk/tc/pubsvc/rehab/cat_fundtrustfinaid/itfund/).
2. 基金將分批接受申請，唯撥款則視乎基金的餘下可用款項。申請機構計劃透過基金申請補助金租用科技產品時，亦請考慮基金結束運作的日期。
 Applications for the I&T Fund will be invited by tranches, subject to the balance of the I&T Fund. When the applicant organisation plans to apply for grant for rental of technology products, please take into consideration the possible termination date of the I&T Fund.
3. 不能為同一申請項目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.
4. 申請機構填寫申請表格時，須提供個人資料。詳情請參閱各申請表內所載的《個人資料收集聲明》。
 The applicant organisation will be required to provide personal data when filling in the application form. Please refer to the “Personal Information Collection Statement” at each application form.
5. 申請的科技產品需可：
 The applied technology products should be able to –
 - (a) 照顧長者、殘疾人士的護理和康復需要或提升他們或／及其照顧者的生活質素；或
 facilitate the rehabilitation or improve quality of life of the elderly or persons with disabilities and/or their carers; or
 - (b) 減輕護理人員及照顧者的負擔和壓力。
 reduce the burden and pressure of care staff and carers.
6. 每個申請只能購置一項產品。申請機構需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。
 Only one product can be included in each application. The applicant organisation should provide at least one quotation and the product catalogue with details including price, specifications, certification and required operating professional.
7. 在填寫申請表格內「服務單位類別」時，請參閱附件 2.3 所列的服務類別填寫。
 Please refer to Annex 2.3 when filling in “Type of Service Unit” in the application form according to the specified and exact name of the relevant service type.
8. 同一服務單位可遞交多次申請，惟所有申請的補助金總額不得超出適用於該服務單位的上限。
 A single service unit may submit multiple applications, provided that the total amount of grants in all the applications does not exceed the ceiling applicable to the service unit.

9. 遞交報價單時需注意以下各項：

Please note the following when providing quotations –

- (a) 抬頭應與申請機構／服務單位名稱相同；
the name of the applicant organisation or 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.

10. 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：

The application 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）及規例、《私營醫療機構條例》（第 633 章）、《殘疾人士院舍條例》（第 613 章）及規例和《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) and regulations, Private Healthcare Facilities Ordinance (Cap. 633), Residential Care Homes (Persons with Disabilities) Ordinance (Cap. 613) and regulations and Personal Data (Privacy) Ordinance (Cap. 486).

11. 政府或其授權使用者有權使用申請機構所提交的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.

12. 政府可在其認為適當時，以及在毋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，包括但並不限於申請機構的資料及個人資料。申請機構提交申請表格，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 and 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.

13. 申請機構可透過填寫電子表格、郵寄或親身送交以下文件向樂齡及康復創科應用基金秘書處提出申請（地址：九龍深水埗元州街 290-296 號西岸國際大廈 5 樓 502 室）：

Applications can be submitted by completing a e-Form, post or in person by the applicant organisation to the Secretariat to Innovation and Technology Fund for Application in Elderly and Rehabilitation Care with the following documents (Address: Room 502, 5/F, West Coast International Building, 290-296 Un Chau Street, Sham Shui Po, Kowloon.) –

- (a) 已填妥的申請表格（附件 2.1(a) 或 2.1(b)）正本兩份；
two originals of completed Application Form (Annex 2.1(a) or 2.1(b));
- (b) 申請產品的報價單副本兩份；
two copies of Quotation of the Application Product;
- (c) 申請產品的產品單張副本兩份；及
two copies of Catalogue of the Application Product; and
- (d) 載有上述文件的電子副本（申請表格：微軟 Word 2003 或以上格式；其餘文件：PDF 格式）的光碟或 USB 儲存器。
CD-ROM Disc or USB drive containing the electronic copies of the above documents (Application Forms: in Microsoft Word 2003 or above format; Other documents: in PDF format)

14. 社署收到申請後，會向申請機構發出認收通知。

The SWD will issue acknowledgment to the applicant organisation after receipt of the application.

以下項目只適用於津助非政府機構津助服務單位

The following items only apply to subvented service units of non-governmental organisations

15. 津助非政府機構的管理層可在同一服務類別下，調配津助服務單位的資助額，唯申請的補助金總額不得超過該機構的資助額上限。

Non-governmental organisation (NGO)'s management may redeploy the grants among eligible subvented service units under the same service type after assessing their needs, with the condition that the total applied amount of grants should not exceed the total amount of maximum grants allocated to the subvented service units of the NGO concerned.

16. 調撥資助額須由合資格非政府機構以書面形式向社署提出。合資格非政府機構須填寫附件 2.1(f) 之「調撥資助額通知書」，並於每批次的申請期內透過郵寄或親身遞交一份通知書的正本至九龍深水埗元州街 290-296 號西岸國際大廈 5 樓 502 室樂齡及康復創科應用基金秘書處。

Notification of virement of grants is required and should be made in written by the eligible NGOs to the SWD. Eligible NGOs should complete the Notification Form of Virement at Annex 2.1(f), and submit one original of the form by post or in person to the Secretariat to Innovation and Technology Fund for Application in Elderly and Rehabilitation Care, Room 502, 5/F, West Coast International Building, 290-296 Un Chau Street, Sham Shui Po, Kowloon, **within the application period of each tranche.**

17. 每宗調撥資助額通知只能涵蓋在同一服務類別下（即安老服務或康復服務）服務單位的調撥。合資格非政府機構於每批次只能就轄下每一服務類別之服務單位向社署提出各一次調撥資助額通知（即安老服務單位的調撥及康復服務單位的調撥各一次）。

Each notification of virement can only be made among service units under the same service type (i.e. elderly service or rehabilitation service). Eligible NGOs can only submit one notification of virement among service units under each service type in each tranche (i.e. one notification of virement among service units providing elderly service and one notification of virement among service units providing rehabilitation service).

18. 社署會以電郵形式向機構發出認收通知，表明相關調撥資助額通知已獲社署接納。在接獲該認收通知前，機構不應視已成功調撥相關資助額。

The SWD will acknowledge receipt and inform the NGOs of its acceptance of the notification through email. NGOs should not consider the grants to be successfully redeployed before receipt of such acknowledgement email.

19. 調撥通知獲接納後不能撤回或修改。相關購置／租用科技產品的申請最終獲批與否均不會影響已獲接納調撥的資助額。有關服務單位可於不同的批次申請使用已調撥之金額作購置／租用科技產品。

The accepted notification of virement cannot be withdrawn nor amended. The result of the related application for procurement or rental of technology product does not affect the accepted notification of virement of grants. The concerned service units could utilise the deployed amount for procurement or rental of technology product through submission of applications in different tranches.

20. 若調撥通知不獲接納，而引致有關服務單位因而未有足夠資助額購置／租用科技產品，相關服務單位須以本身的資源承擔超出的金額，有關申請才會獲得考慮。

If the notification of virement is not accepted and the concerned service units do not have sufficient grant for the procurement or rental of technology product, the concerned service units shall undertake to bear the excessive amount by their own resources before the application will be considered.

樂齡及康復創科應用基金（基金）申請表格
（借出創科產品予長者、殘疾人士及其照顧者居家使用）
填寫指引

Guidance Notes on Completing
Innovation and Technology Fund for Application in Elderly and Rehabilitation Care
(I&T Fund) Application Form
(Lending I&T Fund Products to Elderly Persons, Persons with Disabilities and Carers
for Use at Home)

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（社署）網頁：公共服務 → 康復服務 → 特定基金／特殊需要信託／經濟援助 → 樂齡及康復創科應用基金，或網址 https://www.swd.gov.hk/en/pubsvc/rehab/cat_fundtrustfinaid/itfund/）。
 Before you lodge an application for the I&T Fund with the application form, please study the I&T Fund Manual (available at Social Welfare Department (SWD)'s website: Public Services → Rehabilitation Services → Funds for Specific Groups / Special Needs Trust / Financial Assistance → Innovation and Technology Fund for Application in Elderly and Rehabilitation Care, or website at https://www.swd.gov.hk/tc/pubsvc/rehab/cat_fundtrustfinaid/itfund/).
2. 借出創科產品予長者、殘疾人士及其照顧者居家使用（借用）全年均接受申請。
 Application for Lending I&T Fund Products to Elderly Persons, Persons with Disabilities and Carers for Use at Home (Lending) is open year-round.
3. 不能為同一申請項目同時申請其他政府基金。
 Duplication of different government funds to cover the same applied lending products for the I&T Fund is not allowed.
4. 申請機構填寫申請表格時，須提供個人資料。詳情請參閱各申請表內所載的《個人資料收集聲明》。
 The applicant organisation will be required to provide personal data when filling in the application form. Please refer to the “Personal Information Collection Statement” at each application form.
5. 申請借出作居家使用的創科產品須可：
 The applied innovative technology products for household use should be able to –
 - (a) 提升長者、殘疾人士的生活質素；或
 improve quality of life of the elderly or persons with disabilities; or
 - (b) 減輕照顧者的壓力。
 relieve the pressure of their carers.
6. 每個申請只能購置一項產品。申請機構須提交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。
 Only one product can be included in each application. The application organisation should provide at least one quotation and product catalogue with details including price details, specifications, certification and required operating professional.
7. 借用只接受現為長者或殘疾人士提供社區照顧及支援服務的津助安老及康復服務單位的申請（不包括院舍服務單位）。在填寫申請表格內「服務單位類別」時，請參閱附件 2.3 所列的服務類別填寫。
 Lending only accepts applications from subvented elderly and rehabilitation service units providing community care and support services for the elderly or persons with disabilities (excluding residential service units). Please refer to Annex 2.3 when filling in “Type of Service Unit” in the application form according to the specified and exact name of the relevant service type.
8. 申請服務單位須承擔與借用服務相關的額外費用（包括但不限於產品清潔及運送等）。

(Please download latest version of documents from the I&T Fund website)

The applicant service unit(s) will have to bear the additional costs related to lending service (including but not limited to the charge for product cleaning and delivery, etc.).

9. 借用接受由兩個或以上機構共同提出的申請（聯合申請）。聯合申請的各機構須指定其中一間機構作為申請統籌機構。所有機構均須以書面同意（同意聲明書載於附件 2.1(e)）遞交申請，以及就所申請項目承擔共同責任，並授權申請統籌機構遞交申請和作為單一代表與政府聯絡及處理有關此申請的一切事宜，包括但不限於收取就此申請所獲批發放的全部補助金。政府在任何情況下並不會就申請機構間潛在或發生的任何糾紛承擔任何責任。

Joint application for lending, which is an application made by two or more organisations, is allowed. All organisations constituting the joint application shall appoint one organisation as the lead applicant organisation for the application. All organisations must indicate their consent in written (The Declaration of Consent Form is at Annex 2.1(e)), for the application and bear joint responsibilities for the application, as well as to authorise the lead applicant organisation to submit the application and act as the sole representative in the communication with the government and to handle any matters arising from the application, including but not limited to receiving the full amount of grants approved for the application. The government does not in any circumstances accept any responsibility or liability for any potential disputes or disputes arising from between the applicant organisations.

10. 遞交報價單時需注意以下各項：

Please note the following when providing quotations –

- (a) 抬頭應與申請機構／服務單位名稱相同；

the name of the applicant organisation or 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.

11. 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：

The application 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）及規例、《私營醫療機構條例》（第 633 章）、《殘疾人士院舍條例》（第 613 章）及規例和《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) and regulations, Private Healthcare Facilities Ordinance (Cap. 633), Residential Care Homes (Persons with Disabilities) Ordinance (Cap. 613) and regulations and Personal Data (Privacy) Ordinance (Cap. 486).

12. 政府或其授權使用者有權使用申請機構所提交的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 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.

13. 政府可在其認為適當時，以及在毋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及個人資料。申請機構提交申請表格，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 and 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.

14. 申請機構可透過填寫電子表格、郵寄或親身送交以下文件向樂齡及康復創科應用基金秘書處提出申請（地址：九龍深水埗元州街 290-296 號西岸國際大廈 5 樓 502 室）：

Applications can be submitted by completing a e-Form, post or in person by the applicant organisation(s) to the Secretariat to Innovation and Technology Fund for Application in Elderly and Rehabilitation Care with the following documents (Address: Room 502, 5/F, West Coast International Building, 290-296 Un Chau Street, Sham Shui Po, Kowloon.) –

單一機構申請 Application by a single organisation

- (a) 已填妥的申請表格（附件 2.1(c)）正本兩份；
two originals of completed Application Form (Annex 2.1(c));
- (b) 申請產品的報價單副本兩份；
two copies of Quotation of the Application Product;
- (c) 申請產品的產品單張副本兩份；
two copies of Catalogue of the Application Product;
- (d) 用以收集服務使用者（及／或其照顧者）對借用服務及借用產品之意見的相關問卷／調查表的範本兩份；及
the template of the questionnaire / survey to be used to collect feedback from service users and/or carers on the lending service and product in duplicate; and
- (e) 載有上述文件的電子副本（申請表格：微軟 Word 2003 或以上格式；其餘文件：PDF 格式）的光碟或 USB 儲存器。
CD-ROM Disc or USB drive containing the electronic copies of the above documents (Application Forms: in Microsoft Word 2003 or above format; Other documents: in PDF format)

跨機構聯合申請 Joint application with multiple organisations

- (a) 由申請統籌機構填妥的聯合申請表格（附件 2.1(d)）正本兩份；
two originals of Joint Application Form completed by the lead applicant organisation (Annex 2.1(d));
- (b) 由其餘聯合申請機構各自簽妥的同意聲明書（附件 2.1(e)）正本各兩份；
two originals of each of the Declaration of Consent Form(s) (Annex 2.1(e)) duly signed by the remaining joint applicant organisation(s);
- (c) 申請產品的報價單副本兩份；
two copies of Quotation of the Application Product;
- (d) 申請產品的產品單張副本兩份；及
two copies of Catalogue of the Application Product; and
- (e) 用以收集服務使用者（及／或其照顧者）對借用服務及借用產品之意見的相關問卷／調查表的範本；及
the template of the questionnaire / survey to be used to collect feedback from service users and/or carers on the lending service and product in duplicate; and

- (f) 載有上述文件的電子副本（申請表格：微軟 Word 2003 或以上格式；其餘文件：PDF 格式）的光碟或 USB 儲存器。

CD-ROM Disc or USB drive containing the electronic copies of the above documents (Application Forms: in Microsoft Word 2003 or above format; Other documents: in PDF format)

21. 社署收到申請後，會向申請機構發出認收通知。

The SWD will issue acknowledgment to the applicant organisation after receipt of the application.

樂齡及康復創科應用基金
各類服務單位補助金上限

**Innovation and Technology Fund for Application in Elderly and Rehabilitation Care
(I&T Fund)**

Maximum Grant by Type of Service Unit

表 1： 安老服務
Table 1: Elderly Services

服務單位類別 Type of Service Units	補助金上限 ^{註 1} Maximum Grant ^{Note 1}	
	單位在 2025 年 3 月 31 日以前投 入服務 Service Unit with Date of Commencement Before 31 March 2025	單位在 2025 年 3 月 31 日或以後 投入服務 Service Unit with Date of Commencement On 31 March 2025 or After
院舍照顧服務（每間院舍） ^{註 2} Residential Care Service (per home) ^{Note 2}		
1. 安老院／護養院 ^{註 3} Residential Care Home for the Elderly / Nursing Home ^{Note 3}		
1.1 提供 50 張或以下床位 with a capacity of 50 or below	\$450,000	\$300,000
1.2 提供 51 張至 150 張床位 with a capacity of 51 to 150	\$900,000	\$600,000
1.3 提供 150 張以上床位 with a capacity of above 150	\$1,350,000	\$900,000
社區照顧及支援服務（每個單位） Community Care and Support Service (per centre / unit)		
2. 長者地區中心 District Elderly Community Centre	\$750,000	\$500,000
3. 安老院舍外展專業服務 Multi-disciplinary Outreaching Support Teams for the Elderly	\$750,000	\$500,000
4. 長者鄰舍中心 Neighbourhood Elderly Centre	\$450,000	\$300,000
5. 長者日間護理中心 Day Care Centre for the Elderly	\$450,000	\$300,000
6. 家居照顧服務隊 Home Care Services Team	\$450,000	\$300,000
7. 家居照顧及支援服務隊 Home Care and Support Services Team	\$450,000	\$300,000
8. 長者社區照顧服務券計劃下認可服務單位 Recognised Service Provider under the Community Care Service Voucher Scheme for the Elderly	\$450,000	\$300,000
9. 長者日間護理單位買位計劃 Bought Place Scheme on Day Care Units for the Elderly	\$450,000	\$300,000
10. 長者活動中心 Social Centre for the Elderly	\$300,000	\$200,000

表 2： 康復服務

Table 2: Rehabilitation Services

服務單位類別 Type of Service Units	補助金上限 ^{註 1} Maximum Grant ^{Note 1}	
	單位在 2025 年 3 月 31 日以前投 入服務 Service Unit with Date of Commencement Before 31 March 2025	單位在 2025 年 3 月 31 日或以後 投入服務 Service Unit with Date of Commencement On 31 March 2025 or After
院舍照顧服務（每間院舍） ^{註 2} Residential Care Service (per home) ^{Note 2}		
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 ^{註 3} Residential Care Home for Persons with Disabilities / Residential Special Child Care Centre/ Transitional Care and Support Centre for Tetraplegic Patients ^{Note 3}		
1.1 提供 50 張或以下床位 with a capacity of 50 or below	\$450,000	\$300,000
1.2 提供 51 張至 150 張床位 with a capacity of 51 to 150	\$900,000	\$600,000
1.3 提供 150 張以上床位 with a capacity of above 150	\$1,350,000	\$900,000
日間康復和社區支援服務（每個單位） Day Rehabilitation and Community Support Service (per centre / unit)		
2. 日間展能中心（提供 80 個或以上名額） Day Activity Centre (with 80 places or above)	\$750,000	\$500,000
3. 綜合職業康復服務中心（提供 80 個或以上名額） Integrated Vocational Rehabilitation Services Centre (with 80 places or above)	\$750,000	\$500,000
4. 庇護工場 ^{註 4} Sheltered Workshop ^{Note 4}	\$750,000	\$500,000
5. 綜合職業訓練中心 – 日間服務 Integrated Vocational Training Centre – Day Service	\$750,000	\$500,000
6. 殘疾人士地區支援中心 District Support Centre for Persons with Disabilities	\$750,000	\$500,000
7. 精神健康綜合社區中心 Integrated Community Centre for Mental Wellness	\$750,000	\$500,000
8. 日間展能中心（提供 80 個以下名額） Day Activity Centre (with below 80 places)	\$450,000	\$300,000
9. 綜合職業康復服務中心（提供 80 個以下名額） Integrated Vocational Rehabilitation Services Centre (with below 80 places)	\$450,000	\$300,000
10. 特殊幼兒中心 Special Child Care Centre	\$450,000	\$300,000
11. 早期教育及訓練中心 Early Education and Training Centre	\$450,000	\$300,000
12. 嚴重殘疾人士家居照顧服務 Home Care Service for Persons with Severe Disabilities	\$450,000	\$300,000

服務單位類別 Type of Service Units	補助金上限 ^{註1} Maximum Grant ^{Note 1}	
	單位在 2025 年 3 月 31 日以前投 入服務 Service Unit with Date of Commencement Before 31 March 2025	單位在 2025 年 3 月 31 日或以後 投入服務 Service Unit with Date of Commencement On 31 March 2025 or After
13. 嚴重肢體傷殘人士綜合支援服務 Integrated Support Service for Persons with Severe Disabilities	\$450,000	\$300,000
14. 四肢癱瘓病人過渡期護理支援中心 Transitional Care and Support Centre for Tetraplegic Patients	\$450,000	\$300,000
15. 日間社區康復中心 Community Rehabilitation Day Centre	\$450,000	\$300,000
16. 到校學前康復服務 ^{註5} On-site Pre-school Rehabilitation Services ^{Note 5}	\$450,000	\$300,000
17. 私營殘疾人士院舍專業外展服務 Professional Outreaching Team for Private Residential Care Homes for Persons with Disabilities	\$450,000	\$300,000
18. 自閉症人士支援中心 Support Centre for Persons with Autism	\$450,000	\$300,000
19. 家長／親屬資源中心 Parents / Relatives Resource Centre	\$300,000	\$200,000
20. 殘疾人士社交及康樂中心 Social and Recreational Centre for the Disabled	\$300,000	\$200,000
21. 社區復康網絡 Community Rehabilitation Network	\$300,000	\$200,000
22. 視障人士康復及訓練中心 Rehabilitation and Training Centre for Visually Impaired Persons	\$300,000	\$200,000
23. 聽覺受損人士綜合服務中心 Multi-service Centre for the Hearing Impaired Persons	\$300,000	\$200,000
24. 為視覺受損人士而設的傳達及資訊服務 Communication and Information Service for Visually Impaired Persons	\$300,000	\$200,000
25. 綜合社區康復中心 Integrated Community Rehabilitation Centre		
25.1 設有 1 隊服務隊 with 1 service team	\$750,000	\$500,000
25.2 設有 1.5 隊服務隊 with 1.5 service teams	\$1,050,000	\$700,000
25.3 設有 2 隊服務隊 with 2 service teams	\$1,350,000	\$900,000

註 Note

- 1 : 在 2025 年 3 月 31 日以前投入服務的單位的現行補助金上限包括 2025 年 3 月 31 日以前服務單位補助金的上限及增加的 50% 補助金。在 2025 年 3 月 31 日或以後投入服務的單位，現行補助金上限適用於服務單位營運的首五年。待服務單位營運滿五年後，將獲增加 50% 補助金。
The prevailing maximum grant of service units commenced service before 31 March 2025 includes the maximum grant effective before 31 March 2025 and the additional 50% of the grant. For service units to be commenced service after 31 March 2025, the prevailing maximum grant is applicable to the first five years of operation. The service units will be eligible for an additional 50% of the maximum grant after 5 years of service commencement.
- 2 : 2025 年 3 月 31 日前已投入服務的院舍可獲增加 50% 補助金，以院舍於 2025 年 3 月 31 日之床位數目計算。若院舍床位數目日後有所調整，50% 之補助金仍以院舍於 2025 年 3 月 31 日之床位數目計算。2025 年 3 月 31 日或以後投入服務的院舍，五年後獲增加 50% 補助金，將以院舍投入服務滿五年當日之床位數目計算。
Residential care homes (RCHs) that commenced service before 31 March 2025 are eligible for an additional 50% of the maximum grant, calculated based on the number of beds as at 31 March 2025. If there is an adjustment in the number of beds afterwards, the additional 50% of the maximum grant would still be calculated based on the number of beds as at 31 March 2025. RCHs that commence service on or after 31 March 2025 are eligible for an additional 50% of the maximum grant after five years of service commencement. The amount of the additional grant will be calculated based on the number of beds in RCHs on the date it reaches five years of operation.
- 3 : 在 2026 年 3 月 31 日或之後投入服務的單位，若其床位數目遠高於現行標準，社會福利署（社署）將就補助金上限作出特別考慮。社署會按個別情況評核每個相關單位，並在處理及審批時有關申請時保留絕對及最終酌情權。
For service units that commence service on or after 31 March 2026, the Social Welfare Department (SWD) would give special consideration to the maximum grant where the number of beds significantly exceeds the prevailing standard. Each relevant unit will be assessed on an individual basis, and the SWD reserves the sole and absolute discretion in the processing and approval of such applications.
- 4 : 此服務已於 2025 年 10 月 1 日起提升為綜合職業康復服務中心。
The service has been upgraded to Integrated Vocational Rehabilitation Services Centre (IVRSC) in 1 October 2025.
- 5 : 根據 2018 年服務單位數目計算補助金上限。
Calculation of grant based on number of service unit in 2018.

樂齡及康復創科應用基金（基金）
申領款項證明書填寫說明
〔適用於購置／租用創科產品〕

Notes on Completing the Innovation and Technology Fund for Application in Elderly and Rehabilitation Care (I&T Fund) Claim Certificate
[Applicable to Procurement / Rental of Technology Products]

1. 在填寫申領款項證明書前，請仔細閱讀本說明及載於基金網頁的「填寫申請款項證明書樣本」（https://www.swd.gov.hk/tc/pubsvc/rehab/cat_fundtrustfinaid/itfund/）。
Please read these notes and the “Sample for Completing the Claim Certificate” available at the I&T Fund website (https://www.swd.gov.hk/en/pubsvc/rehab/cat_fundtrustfinaid/itfund/) carefully before completing the Claim Certificate.
2. 每份申領款項證明書只能申領一個補助金代號之款項。
Claim for each Grant Code must be covered by a separate Claim Certificate.
3. 填寫證明書時必須填上由社會福利署（社署）發出的正確補助金代號，以識別所需申領款項的特定補助金。
The correct Grant Code as advised by the Social Welfare Department (SWD) must be quoted to identify the particular grant against which the current claim is being made.
4. 申領款項須附上以下文件：
Each claim request should be submitted with –
 - (a) 已填妥的**申領款項證明書**（正本兩份）；
the completed **Claim Certificate** (TWO originals);
 - (b) 全套發票（正本一份及副本一份）；
full set of invoice(s) (ONE original and ONE copy);
 - (c) 全套收據（正本一份及副本一份）；
full set of receipt(s) (ONE original and ONE copy);
 - (d) 已填妥的**報價記錄書**（正本一份）；及
the completed **Quotation Record Sheet** (ONE original); and
 - (e) 所有報價單（副本各一份，內容須列明價格細項、規格、證書和所需專業人員）
ALL quotations with details including price, specifications, certification and required operating professional (ONE copy for each quotation).
 - (f) 已填妥的「款項付予銀行授權書」（通用表格第 179A 號）（載於《基金手冊》附件 2.5）及一封使用公司／機構正式信紙的說明函件，並須由獲公司／機構授權的人士簽署（如適用）。
the completed “Authority For Payment to A Bank” (GF179A) (at Annex 2.5 of the *I&T Fund Manual*) with a covering letter printed on the official letterhead of the company/organisation and signed by an authorised signatory of the company/organisation (if applicable).

5. 獲批申請機構如選擇以銀行轉帳接收補助金，則每一批次只須就其轄下同一服務類別（下文第八段所指的四個類別）的獲批申請遞交一張「款項付予銀行授權書」。該「款項付予銀行授權書」及說明函件應在每批次首次提交申領款項證明書時一併夾附。

For receiving payment through bank transfer, only ONE “Authority For Payment to A Bank” is required for the same applicant organisation for its approved applications under the same service type (i.e. the 4 service types stated in paragraph 8 below) in each Tranche. The “Authority For Payment to A Bank” and the cover letter should be enclosed together with when the first Claim Certificate was submitted in each Tranche.

6. 獲批申請機構如選擇以支票接收補助金，則請在申領款項證明書提供收款人名稱及接收支票的地址。請核實收款人名稱正確無誤，否則無法把支票兌現。

For receiving payment through cheque, the applicant organisation should provide the Name of Payee and the mailing address for the cheque to be delivered. Please confirm the Name of Payee provided, otherwise the cheque may be not encashed.

7. 如未有填妥申領款項證明書或交妥所需文件，發放款項的時間或會延誤。

Failure to complete the Claim Certificate or submit the required document(s) properly may cause delay in disbursement of grant.

8. 請按服務單位類別，將填妥的申領款項證明書連同所需文件遞交到以下地址：

Please submit the completed Claim Certificate with all required documents to –

(a) 提供資助服務的安老服務單位

Elderly services units providing subsidised services

香港北角英皇道 338 號華懋交易廣場 2 期 31 樓 3105-09 室

Rooms 3105-09, 31/F, Two Chinachem Exchange Square, 338 King's Road, North Point, Hong Kong

(b) 提供資助服務的康復服務單位

Rehabilitation services units providing subsidised services

九龍深水埗元州街 290-296 號西岸國際大廈 5 樓 502 室

Room 502, 5/F, West Coast International Building, 290-296 Un Chau Street, Sham Shui Po, Kowloon

(c) 提供非資助服務的私營及自負盈虧安老院

Private or Self-financing residential care homes for the elderly providing non-subsidised services

香港黃竹坑業勤街 23 號 THE HUB 6 樓

6/F, THE HUB, 23 Yip Kan Street, Wong Chuk Hang, Hong Kong

(d) 提供非資助服務的私營及自負盈虧殘疾人士院舍

Private or Self-financing residential care homes for persons with disabilities providing non-subsidised services

香港黃竹坑業勤街 23 號 THE HUB 5 樓

5/F, THE HUB, 23 Yip Kan Street, Wong Chuk Hang, Hong Kong

9. 社署會保留發票及收據正本作紀錄用途。如獲批機構需要取回發票及收據正本，請在提交申領款項證明書時夾附已貼上足夠郵資的回郵信封。

The SWD will retain the original invoice(s) and receipt(s) for record keeping unless otherwise requested by the applicant organisation. If the applicant organisation wishes to retrieve the original invoice(s) and receipt(s) after the reimbursement process, a self-addressed envelope with sufficient postage should be enclosed with the Claim Certificate submitted.

To: Director of Social Welfare
(Attn.:)^{Note 1}

**Innovation and Technology Fund for Application in Elderly and Rehabilitation Care
(I&T Fund)
Claim Certificate
[Applicable to Procurement / Rental of Technology Products]**

**Name of Approved
Applicant Organisation:**

1

**Name of Approved
Applicant Service
Unit(s):**

2

3

4

5

SWD File Reference:

**Date of Approval of the
Grant:**

Description of Grant (as identical to the Approval Letter):

- Product Name:

- Model Number:

- Amount Approved:

HK\$

Grant Code:

Amount to be Claimed:

HK\$

**Unclaimed Amount to be
Reverted to the I&T
Fund:**

HK\$

(Net of the Final Claim)

(Applicable to Procurement and Final Claim for Rental)

**Grant Disbursement
Arrangement:**

(please "✓" the appropriate box)

☐

Bank Transfer

Please enclose a completed "Authority For Payment to A Bank" (GF179A) with a covering letter printed on the official letterhead of the company/organisation and signed by an authorised signatory of the company/organisation.

☐

Cheque

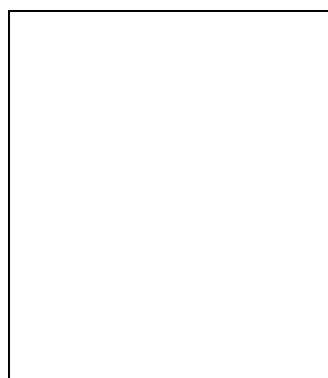
Please provide the **Name of Payee** and **Mailing Address** below and ensure the accuracy of all the information submitted, otherwise the cheque may not be delivered or encashed successfully –

- Name of Payee:

- Mailing Address for
Cheque:

In relation to our claim for payment under the I&T Fund for the procurement or rental of technology products listed above, I am authorised by the approved applicant organisation to certify that –

- (a) the product(s) currently claimed under this Claim Certificate –
- (i) is/are the exact product(s) approved by the I&T Fund;
 - (ii) has/have been received in good conditions;
 - (iii) is/are in accordance with approved specifications and certifications;
 - (iv) has/have not been claimed previously and settled by the I&T Fund;
 - (v) has/have been checked to be correct against the supporting invoice(s) and receipt(s) in respect of the quantity(s), unit price(s) and amount(s); and
 - (vi) has/have been purchased or rented 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;
- (b) full receipt(s), invoice(s), quotation record sheet and quotation(s) have been attached; and
- (c) the unclaimed balance (net of the final claim) of the grant will be reverted to the I&T Fund.



Organisation Chop

Signature of Agency Head: _____

Name of Agency Head: _____

Post Title of Agency Head: _____

Date: _____

Name of Responsible Staff: _____

Contact Number: _____

Contact Email: _____

Note 1 *Please fill in the name of the subject officer of the Social Welfare Department as stated in the “Enquiries” Section of the Approval Letter.*

Innovation and Technology Fund for Application in Elderly and Rehabilitation Care (I&T Fund)

Quotation Record Sheet

[Applicable to Procurement / Rental of Technology Products]

(Please read Chapter 5, Annexes 5.1, 5.2 and 5.3 in the I&T Fund Manual carefully before completing this Quotation Record Sheet)

Grant Code: _____

I. Approved Technology Product

Product Name		Quantity	
Model Number		Approved Amount	HK\$

II. Invitation of Quotations (please “✓” the appropriate box)

Purchase value per case ^{Note 1}

☐ Not exceeding HK\$50,000

☐ I / we have contacted **more than one** supplier for quotations.

☐ I / we have contacted only one supplier for quotation for the following reason(s):

☐ sole agent ^{Note 2}. ☐ other reason (please specify: __)

☐ Over HK\$50,000 but not exceeding the quotation limit specified in paragraph 5.2.1 of the *I&T Fund Manual*

☐ I / we have contacted **no less than five** suppliers for quotations.

☐ I / we have contacted less than five suppliers for quotations for the following reason(s):

☐ sole agent ^{Note 2}. ☐ other reason (please specify: __)

III. Quotation Summary

Offer No.	Supplier ^{Note 3}	Unit Rate	Amount ^{Note 4}	Maintenance Fee	Staff Training Fee	Miscellaneous Expense	Total Amount
		HK\$					
# 1							
# 2							
# 3							
# 4							

Offer No.	Supplier Note 3	Unit Rate	Amount Note 4	Maintenance Fee	Staff Training Fee	Miscellaneous Expense	Total Amount
		HK\$					
# 5							

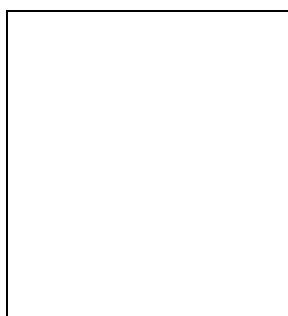
Accepted Offer No.: # _____

Supplier: _____

Grand Total: HK\$ _____

I approved the acceptance of offer which is (please “✓” the appropriate box(es)) –

- ☐ the lowest conforming offer or the highest overall scorer.
- ☐ a single offer with reason(s) provided below:
☐ sole agent^{Note 2}. ☐ other reason (please specify: _____)
- ☐ a higher conforming offer or not the highest overall scorer with reason(s) provided below:



Organisation Chop

Signature of Agency Head: _____

Name of Agency Head: _____

Post Title of Agency Head: _____

Date: _____

Note 1 *Within the same quotation, regardless of the quantity of product.*

Note 2 *Please enclose a copy of the sole agent certificate issued by the manufacturer of the product with a validity period covering the date of purchase.*

Note 3 *Please insert additional row(s) if more than five suppliers were invited for quotation.*

Note 4 *Quantity × Unit Rate.*

樂齡及康復創科應用基金（基金）

申領款項證明書填寫說明

〔適用於借出創科產品予長者、殘疾人士及其照顧者居家使用〕

Notes on Completing the Innovation and Technology Fund for Application in Elderly and Rehabilitation Care (I&T Fund) Claim Certificate

[Applicable to Lending I&T Fund Products to Elderly Persons, Persons with Disabilities and Carers for Use at Home]

10. 在填寫申領款項證明書前，請仔細閱讀本說明及載於基金網頁的「填寫申請款項證明書樣本」（https://www.swd.gov.hk/tc/pubsvc/rehab/cat_fundtrustfinaid/itfund/）。
Please read these notes and the “Sample for Completing the Claim Certificate” available at the I&T Fund website (https://www.swd.gov.hk/en/pubsvc/rehab/cat_fundtrustfinaid/itfund/) carefully before completing the Claim Certificate.
11. 每份申領款項證明書只能申領一個補助金代號之款項。
Claim for each Grant Code must be covered by a separate Claim Certificate.
12. 填寫證明書時必須填上由社會福利署（社署）發出的正確補助金代號，以識別所需申領款項的特定補助金。
The correct Grant Code as advised by the Social Welfare Department (SWD) must be quoted to identify the particular grant against which the current claim is being made.
13. 申領款項須附上以下文件：
Each claim request should be submitted with –
 - (g) 已填妥的**申領款項證明書**（正本兩份）；
the completed **Claim Certificate** (TWO originals);
 - (h) 獲批申請機構／服務單位已開展借用安排的證明，連同一封使用公司／機構正式信紙的**說明函件**，並須由獲公司／機構授權的人士簽署（正本兩份）；
Proof of commencement of the lending arrangement by the approved applicant organisation(s) / service unit(s) with a **covering letter** printed on the official letterhead of the company/organisation and signed by an authorised signatory of the company/organisation (TWO originals);
 - (i) 全套發票（正本一份及副本一份）；
full set of invoice(s) (ONE original and ONE copy);
 - (j) 全套收據（正本一份及副本一份）；
full set of receipt(s) (ONE original and ONE copy);
 - (k) 已填妥的**報價記錄書**（正本一份）；及
the completed **Quotation Record Sheet** (ONE original); and
 - (l) 所有報價單（副本各一份，內容須列明價格細項、規格、證書和所需專業人員）
ALL quotations with details including price, specifications, certification and required operating professional (ONE copy for each quotation).

- (m) 已填妥的「款項付予銀行授權書」（通用表格第 179A 號）（載於《基金手冊》附件 2.5）及一封使用公司／機構正式信紙的說明函件，並須由獲公司／機構授權的人士簽署（如適用）。

the completed “Authority For Payment to A Bank” (GF179A) (at Annex 2.5 of the *I&T Fund Manual*) with a covering letter printed on the official letterhead of the company/organisation and signed by an authorised signatory of the company/organisation (if applicable).

14. 獲批申請機構如選擇以支票接收補助金，則請在申領款項證明書提供收款人名稱及接收支票的地址。請核實收款人名稱正確無誤，否則無法把支票兌現。

For receiving payment through cheque, the applicant organisation should provide the Name of Payee and the mailing address for the cheque to be delivered. Please confirm the Name of Payee provided, otherwise the cheque may be not encashed.

15. 如未有填妥申領款項證明書或交妥所需文件，發放款項的時間或會延誤。

Failure to complete the Claim Certificate or submit the required document(s) properly may cause delay in disbursement of grant.

16. 獲批聯合申請的機構應只由申請統籌機構填寫申領款項證明書並遞交全套申領款項文件。補助金亦將發放予申請統籌機構。

Only the Lead Application Organisation of approved joint application should complete the Claim Certificate and submit the full sets of claim documents. The grants will also be disbursed to the Lead Applicant Organisation.

17. 請按服務單位類別，將填妥的申領款項證明書連同所需文件遞交到以下地址：

Please submit the completed Claim Certificate with all required documents to –

- (e) 提供津助服務的安老服務單位

Elderly services units providing subvented services

香港北角英皇道 338 號華懋交易廣場 2 期 31 樓 3105-09 室

Rooms 3105-09, 31/F, Two Chinachem Exchange Square, 338 King's Road, North Point, Hong Kong

- (f) 提供津助服務的康復服務單位

Rehabilitation services units providing subvented services

九龍深水埗元州街 290-296 號西岸國際大廈 5 樓 502 室

Room 502, 5/F, West Coast International Building, 290-296 Un Chau Street, Sham Shui Po, Kowloon

18. 社署會保留發票及收據正本作紀錄用途。如獲批機構需要取回發票及收據正本，請在提交申領款項證明書時夾附已貼上足夠郵資的回郵信封。

The SWD will retain the original invoice(s) and receipt(s) for record keeping unless otherwise requested by the applicant organisation. If the applicant organisation wishes to retrieve the original invoice(s) and receipt(s) after the reimbursement process, a self-addressed envelope with sufficient postage should be enclosed with the Claim Certificate submitted.

To: Director of Social Welfare
(Attn.:)^{Note 1}

**Innovation and Technology Fund for Application in Elderly and Rehabilitation Care
(I&T Fund)
Claim Certificate
[Applicable to Lending I&T Fund Products for Use at Home]**

Name of Lead Applicant

Organisation:

Name of Other Applicant

Organisation(s): (if any)

**Name of All Approved
Service Unit(s):**

SWD File Reference:

**Date of Approval of the
Grant:**

Description of Grant (as identical to the Approval Letter):

- Product Name:

- Model Number:

- Amount Approved: HK\$

Grant Code:

**Commencement Date of
Lending Arrangement:**

**Item(s) and Amount to be
Claimed**

(please “✓” the appropriate box(es)
and insert the amount)

☐ **Procurement of Product (HK\$)**
As identical to the invoice(s) and receipt(s)

☐ **Administrative Overhead Expense (HK\$)**
Capped at 5% of the total product cost

**Unclaimed Amount to be
Reverted to the I&T
Fund:**

HK\$
(Net of the Final Claim)

☐ **Bank Transfer**
Please enclose a completed “Authority For Payment to A Bank” (GF179A) with a covering letter printed on the official letterhead of the company/organisation and signed by an authorised signatory of the company/organisation.

**Method for Disbursement
of Grant:**

(please “✓” the appropriate box)

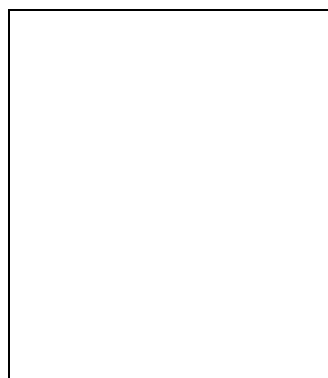
☐ **Cheque**
Please provide the **Name of Payee** and **Mailing Address** below and ensure the accuracy of all the information submitted, otherwise the cheque may not be delivered or encashed successfully –

- Name of Payee:

- Mailing Address for
Cheque:

In relation to our claim for payment under the I&T Fund for the procurement of technology products for lending to elderly persons, persons with disabilities and carers for use at home listed above, I am authorised by approved applicant organisation(s) to certify that –

- (d) the product(s) currently claimed under this Claim Certificate –
- (vii) is/are the exact product(s) approved by the I&T Fund;
 - (viii) has/have been received in good conditions;
 - (ix) is/are in accordance with approved specifications and certifications;
 - (x) has/have not been claimed previously and settled by the I&T Fund;
 - (xi) has/have been checked to be correct against the supporting invoice(s) and receipt(s) in respect of the quantity(s), unit price(s) and amount(s); and
 - (xii) 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;
- (e) full receipt(s), invoice(s), quotation record sheet and quotation(s) have been attached;
- (f) the lending arrangement has been commenced with the relevant proof attached; and
- (g) the unclaimed balance (net of the final claim) of the grant will be reverted to the I&T Fund (applicable to final claim).



Organisation Chop
(of the Lead Applicant Organisation)

Signature of Agency Head:

(of the Lead Applicant Organisation)

Name of Agency Head:

(of the Lead Applicant Organisation)

Post Title of Agency Head:

(of the Lead Applicant Organisation)

Date:

Name of Responsible Staff:

(of the Lead Applicant Organisation)

Contact Number:

Contact Email:

Note 1 *Please fill in the name of the subject officer of the Social Welfare Department as stated in the “Enquiries” Section of the Approval Letter.*

Innovation and Technology Fund for Application in Elderly and Rehabilitation Care (I&T Fund)

Quotation Record Sheet

[Applicable to Lending I&T Fund Products for Use at Home]

(Please read Chapter 5, Annexes 5.1, 5.2 and 5.3 in the I&T Fund Manual carefully before completing this Quotation Record Sheet)

Grant Code: _____

IV. Approved Technology Product

Product Name		Quantity	
Model Number		Total Amount	HK\$

V. Invitation of Quotations (please “✓” the appropriate box)

Purchase value per case ^{Note 1}

☐ Not exceeding HK\$50,000

☐ I / we have contacted **more than one** supplier for quotations.

☐ I / we have contacted only one supplier for quotation for the following reason(s):

☐ sole agent ^{Note 2}. ☐ other reason (please specify: __)

☐ Over HK\$50,000 but not exceeding the quotation limit specified in paragraph 5.2.1 of the *I&T Fund Manual*

☐ I / we have contacted **no less than five** suppliers for quotations.

☐ I / we have contacted less than five suppliers for quotations for the following reason(s):

☐ sole agent ^{Note 2}. ☐ other reason (please specify: __)

VI. Quotation Summary

Offer No.	Supplier ^{Note 3}	Unit Rate	Amount ^{Note 4}	Maintenance Fee	Staff Training Fee	Miscellaneous Expense	Total Amount
		HK\$					
# 1							
# 2							
# 3							
# 4							

Offer No.	Supplier Note 3	Unit Rate	Amount Note 4	Maintenance Fee	Staff Training Fee	Miscellaneous Expense	Total Amount
		HK\$					
# 5							

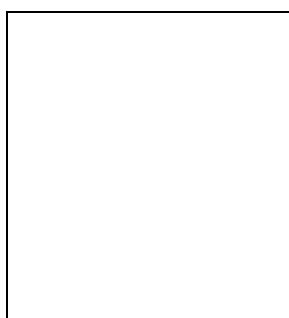
Accepted Offer No.: # _____

Supplier: _____

Grand Total: HK\$ _____

I / we approved the acceptance of offer which is (please “✓” the appropriate box) –

- ☐ the lowest conforming offer or the highest overall scorer.
- ☐ a single offer with reason(s) provided below:
☐ sole agent ^{Note 2}. ☐ other reason (please specify: _____)
- ☐ a higher conforming offer or not the highest overall scorer with reason(s) provided below:



Organisation Chop
(of the Lead Applicant Organisation)

Signature of Agency Head:

(of the Lead Applicant Organisation) _____

Name of Agency Head:

(of the Lead Applicant Organisation) _____

Post Title of Agency Head:

(of the Lead Applicant Organisation) _____

Date: _____

Note 1 *Within the same quotation, regardless of the quantity of product.*

Note 2 *Please enclose a copy of the sole agent certificate issued by the manufacturer of the product with a validity period covering the date of purchase.*

Note 3 *Please insert additional row(s) if more than five suppliers were invited for quotation.*

Note 4 *Quantity × Unit Rate.*

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, III, IV, V 及 VI 欄
Please complete sections I, II, III, IV, V and VI 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)

參閱背頁 只供收款人填寫的附註 See Notes Overleaf - For Payee's Use	I 致： To: 社會福利署 Social Welfare Department	VII 只供部門填寫 FOR DEPARTMENT USE ONLY
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: — 申領樂齡及康復創科應用基金款項 Claim for Grants under Innovation and Technology Fund for Application in Elderly and Rehabilitation Care		
付款給我／我們所須的資料詳情載於第II至第V欄 The particulars necessary to effect payment to me/us are given in Section II to V below		
參閱背頁 註一及註二 See Notes 1 & 2 overleaf	II 收款人名稱 (申請人必須填寫)：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 (applicant is required to complete): For individual - Surname first (Maximum 80 characters for English or 40 words for Chinese)	
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)		
參閱背頁 註三 See Note 3 overleaf	III 請將應付給我／我們的全部款項存入我／我們在下列帳戶 (請選擇其中一項並在適當方格內填上「✓」號) All sums due to me/us should be paid into my/our account (Please choose ONE of the following options and put "✓" in the appropriate box)	
☐ 銀行帳戶 Bank Account 銀行 Bank _____ 分行 Branch _____ 銀行編號 Bank Code _____ 分行編號 Branch Code _____ 帳戶號碼 Account No. _____ (2B)		
☐ 轉數快識別碼帳戶 FPS Identifier Account FPS Identifier Account _____ ☐ 香港身份證號碼登記作為轉數快識別代碼帳戶 (請確保香港身份證號碼已提供在第六VI欄內) HKIC number registered as an FPS Proxy Account (Please ensure HKIC number has been provided in Section VI)		
參閱背頁 註四及註五 See Notes 4 & 5 overleaf	IV 我／我們的銀行帳戶或轉數快識別碼帳戶英文名稱如下 (只適用於付款至銀行帳戶／轉數快識別碼帳戶) My / our Bank Account or FPS Identifier Account English name is as follows (Only applicable to the payment to Bank Account / FPS Identifier Account) 銀行帳戶／轉數快識別碼帳戶英文名稱 Name of Bank Account / FPS Identifier Account in English	
參閱背頁 註六及註七 See Notes 6 & 7 overleaf	V 我／我們選擇以傳真方式或電子郵件接收催款通知書 (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. _____ 或 OR 電子郵件地址 e-mail address _____	
VI 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		
簽名 Signature _____ 姓名(正楷) Name in block letters _____ 香港身份證／護照號碼 HKIC No./Passport No. _____ 電話號碼 Telephone No. _____ 日期 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		

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、III、IV、V 及 VI 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. 請確保所提供的轉數快識別代碼已正確連繫收款人的銀行帳戶或儲值支付工具以收取款項。儲值支付工具僅適用於“轉數快識別碼”，不適用於“香港身份證號碼”登記作為轉數快識別代碼收取款項。
5. 銀行和儲值支付工具營運商根據其經營模式及風險管理措施，就各類型支付設有不同的限額。請向有關銀行或儲值支付工具營運商查詢透過轉數快收取款項的最高交易限額。
6. 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。如銀行編號格式與本表格上的不符，請致電 3847 8967 跟進。
7. 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。
8. 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。
9. 請把填妥表格寄回你通常致送發票的政府部門，或香港九龍長沙灣東京街西3號庫務大樓19樓庫務署財務管理組。如有查詢，請致電 3847 8967。

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（第 III 及 IV 欄）有任何更改，須另填一份新表格。

第 VII 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, III, IV, V and VI)

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. Please make sure that the FPS Proxy Account provided is properly linked with the bank account or Stored Value Facility ("SVF") for receiving payments. SVF is applicable only to the case of "FPS Identifier" but not "HKIC Number" registered as FPS Proxy Account.
5. Banks and SVF operators have defined different thresholds for various types of payment based on their business models and risk control management. Please contact your banker or SVF operators for the maximum transaction limit for receiving payments through FPS.
6. 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. If your bank account has different format from that stated in this form, please contact 3847 8967 for further assistance.
7. 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.
8. 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).
9. Please send the completed form to the government department to which you normally issue your invoices; or Director of Accounting Services (Attn.: Financial Control Section) at 19/F, Treasury Building, 3 Tonkin Street West, Cheung Sha Wan, Kowloon, Hong Kong. For enquiries, please call 3847 8967.

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 (Section III and IV), a new form must be completed.

Section VII

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

**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 (I&T Fund)
Application Form
(Trial Use of Newly Developed Technology Product)**

在填寫此份表格前，請仔細參閱載於**附件 3.2** 的指引及《樂齡及康復創科應用基金手冊》。

Please study the Guidance Notes at **Annex 3.2** and
the I&T Fund Manual carefully before you complete the form.

1. 申請機構和服務單位資料

Information of Applicant Organisation and Service Unit(s)

服務類別 Service type

(每份申請表格只可涵蓋一種服務類別)

Each application should only cover one service type)

申請性質 Nature of application

申請機構名稱 Name of Organisation

(須同時以中文和英文填寫)

Should be completed in both English and Chinese)

通訊地址 Correspondence address

(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

負責職員 Responsible staff

機構性質 Nature of organisation

服務單位現正接受

社會福利署(社署)津助／資助

**Currently receiving subvention or subsidies
from the Social Welfare Department (SWD)**

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 or donation received on the same applied 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 or donation received on the same applied technology product.
基金／捐款名稱：
Name of funding or donation:
基金／捐款性質：☐ 政府 Governmental ☐ 非政府 Non-governmental
Nature of funding or donation:
基金／捐款金額：港幣 HK\$
Amount of funding or donation:

3. 個人資料收集聲明

Personal Information Collection Statement收集目的Purposes of Collection

本表格所提供的機構及個人資料，會供社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 SWD for assessing your organisation's application for the I&T Fund 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 Sections 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 Director of Social Welfare

（經辦人：社會工作主任（樂齡及康復創科應用基金））

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

地址 Address：九龍深水埗元州街 290-296 號西岸國際大廈 5 樓 502 室
Room 502, 5/F, West Coast International Building, 290-296 Un Chau Street,
Sham Shui Po, Kowloon

電話 Phone：3106 2847

傳真 Fax：3188 2845

電郵 Email：rehabenq@swd.gov.hk

4. 聲明
Declaration

本人代表，並獲其正式授權，作出以下聲明：

I, on behalf of and duly authorised by, 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，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（社署）的資助有所改動），會立即通知社署。如填報資料不確，申請將被視為無效，同時，社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 (SWD) immediately if there are any subsequent changes to the above information (in particular, subsequent change in subsidy from the SWD 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 I&T Fund. 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 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 or 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;

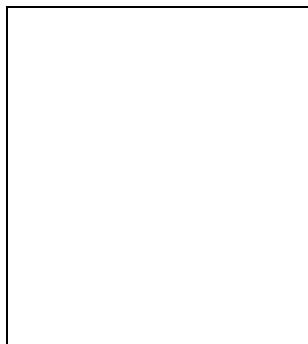
- (E) 本人在填寫此份表格時已經仔細參閱附件 3.2 的指引及《樂齡及康復創科應用基金手冊》。同時，

(Please download latest version of documents from the I&T Fund website)

亦已附上所有需要的有關文件以供審閱； 及

I have read the Guidance Notes at **Annex 3.2** and the I&T Fund Manual carefully before completing this form and have also enclosed all the supporting documents required; and

- (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 does not have any ownership or share of ownership of the applied technology product.



機構印章

Organisation Chop

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

機構首長簽署

Signature of agency head

(簽署 Signature)

機構首長姓名

Name of agency head

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

機構首長職位名稱

Post title of agency head

(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

日期

Date

試用新研發科技產品 ^{2 & 3}

Trial Use of Newly Developed Technology Product ^{2 & 3}

註²： 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**。

Note²: Please provide **quotation and the product catalogue** 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 available.

註³： 每份申請只可涵蓋一個項目。

Note³: Each application should only cover one project.

申請項目一般資料 General Information of Trial Use Project	
項目名稱 Project name (須同時以中文和英文填寫 Should be completed in both English and Chinese)	
申請金額 Total amount applied	港幣 HK\$
申請機構項目統籌 Project coordinator of applicant organisation (須同時以中文和英文填寫 Should be completed in both English and Chinese)	姓名 Name
	職位 Post
	聯絡電話 Telephone number
	電郵地址 E-mail address

協作夥伴資料 Information of Collaborative Partner	
協作夥伴名稱 Name of collaborative partner (須同時以中文和英文填寫 Should be completed in both English and Chinese)	
協作伙伴類別 Nature of collaborative partner (請在適當的方格內加上「✓」號 Please “✓” as appropriate)	☐ 本地科研機構 Local research and development companies ☐ 本地大專院校 Local tertiary institutions ☐ 其他（請註明）Other (please specify) : _____

協作夥伴資料 Information of Collaborative Partner	
協作伙伴地址 Address of collaborative partner	
協作伙伴項目統籌 Project coordinator collaborative partner (須同時以中文和英文填寫 Should be completed in both English and Chinese)	姓名 Name
	職位 Post
	聯絡電話 Telephone number
	電郵地址 E-mail address

申請產品資料 Information of Application Product	
產品名稱 Product name (須與報價單一致 Identical to quotation) (須同時以中文和英文填寫 Should be completed in both English and Chinese)	
產品品牌 Brand name (須與報價單一致 Identical to quotation)	
產品型號 Model No. (須與報價單一致 Identical to quotation)	
生產商名稱 Name of manufacturer	
產地 Origin	
證書 Certification(s) (如有，請註明並夾附 If any, please state and enclose)	

參與試用的服務單位資料 Service Unit(s) Participating in Trial	
參與試用的服務單位數目 Number of service units participating in trial	
如服務單位數目超過 5 間，請另行加行填寫，並清楚標示服務單位編號 In case the number of applicant service unit exceeds 5, please insert new row(s) and state clearly the Applicant service unit "No.".	

參與試用的服務單位資料 Service Unit(s) Participating in Trial		
編號 No.	服務單位名稱 Name(s) of service unit (須同時以中文和英文填寫 Should be completed in both English and Chinese)	服務單位類別 Type(s) of service unit (見附件 2.3 See Annex 2.3)
1		
2		
3		
4		
5		

項目其他事項 Other Information of Trial Use Project	
產品受惠人類別和數目 Type(s) and number of beneficiaries of the product (請在適當的方格內加上「✓」號 Please “✓” as appropriate)	☐ 長者 (年齡 60 歲或以上) Elderly (aged 60 or above) _____人 person(s) ☐ 殘疾人士 Persons with disabilities (殘疾類別 Type(s) of disability : _____) _____人 person(s) ☒ 護理人員 Care staff _____人 person(s)
申請理據 Justification for application (請詳述產品／項目對受眾帶來的益處。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。 Please elaborate how the product/ project could benefit the beneficiaries. If the application includes multiple components/ service items, justification should be provided for each of them.)	

項目其他事項 Other Information of Trial Use Project	
申請機構／服務單位具備的經驗、能力和專業知識，以及供應商所提供的產品訓練詳情 The experience, ability and professional knowledge of the Applicant organisation/ service unit(s), and the training provided by the vendor (請說明申請機構／服務單位如何懂得運用相關申請產品。 Please elaborate how the Applicant organisation/ service unit(s) is/are able to operate the application product.)	
試用產品效果理想下申請機構的跟進計劃 Applicant organisation's plan if the trial use of the product is satisfactory (如購買／租用有關產品，或擴大產品應用至其他服務單位等 e.g. to procure/rent the product, expand adoption of the product to other service units, etc.)	
試用產品效果不理想下申請機構的跟進計劃 Applicant organisation's plan if the trial use of the product is unsatisfactory	

安全合規性 Safety Compliance				
詳細資料及證明文件應由協作伙伴／申請機構以附件形式提供 Details and supporting document(s) should be provided by Collaborative Partner/ Applicant Organisation as Annex(es)				
項目 Item (請在適當的方格內加上「✓」號 Please “✓” as appropriate)	有 Yes	無 No	不適用 N/A	已提交有關資料／文件 Information / Documents provided

安全合規性 Safety Compliance				
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	☐	☐	☐	☐
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	☐	☐	☐	☐
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	☐	☐	☐	☐
產品需要配合特定的設施（如無線網絡、天花連接等）使用，及證明申請服務單位有足夠設施配合產品運作的文件 Required technical/physical infrastructure (e.g. Wi-Fi, 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	☐	☐	☐	☐

項目進度指標 Project Milestones				
項目開始日期 Project commencement date		按一下這裡以輸入日期。Click here to enter date.		
項目完成日期 Project completion date		按一下這裡以輸入日期。Click here to enter date.		
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，請自行加行填寫／刪去多餘行列 Please insert or remove additional row(s) if necessary.)				
主要階段 Key Stage	時段 Period	時期（月） Duration (Month)	詳細內容（包括進行產品測試、員工訓練等，並須註明該階段所需的專業人員種類及數目） Details (including product testing, staff training, etc. The type(s) and number of professional(s) required should also be stated.)	擬定達到的進度指標 Project milestones to be reached
第__年 Year __				
第__年 Year __				
第__年 Year __				

預算 Budget					
請為每項細項提供參考預算。 Please provide a reference budget for the following items.					
項目 Item	內容 Content	款額 Amount (港幣 HK\$) (如有需要, 請開新頁填寫 Please use separate page(s) if necessary.)			
		第__年 Year ____	第__年 Year ____	第__年 Year ____	小計 Subtotal
(i) 新研發科技產品價格 Price for newly developed technology product(s)					
(ii) 新研發科技產品訂製費用 Price for newly developed technology product(s) customisation (如適用 If applicable)					
(iii) 科技研發公司／大專院校顧問費用 Consultation fee for R&D company or tertiary institution					
(iv) 員工使用新研發科技產品訓練費用 Staff training fee for using the newly developed technology product(s)					

(Please download latest version of documents from the I&T Fund website)

預算 Budget					
(v) 保養費用 Maintenance fee					
(vi) 雜項費用 Miscellaneous fee					
(vii) 行政支援費用 Administrative overheads (上限為項目總開支 15% Not exceeding 15% of total project cost)					
總額 Total					

樂齡及康復創科應用基金（基金）申請表格
（試用新研發科技產品）
填寫指引

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（社署）網頁：公共服務 → 康復服務 → 特定基金／特殊需要信託／經濟援助 → 樂齡及康復創科應用基金，或網址 https://www.swd.gov.hk/en/pubsvc/rehab/cat_fundtrustfinaid/itfund/）。
 Before you lodge an application for the I&T Fund with the application form, please study the I&T Fund Manual (available at Social Welfare Department (SWD)'s website: Public Services → Rehabilitation Services → Funds for Specific Groups / Special Needs Trust / Financial Assistance → Innovation and Technology Fund for Application in Elderly and Rehabilitation Care, or website at https://www.swd.gov.hk/tc/pubsvc/rehab/cat_fundtrustfinaid/itfund/).
2. 試用新研發科技產品全年均接受申請，唯撥款則視乎基金的餘下可用款項。申請機構計劃透過基金申請補助金試用新研發科技產品時，亦請考慮基金結束運作的日期。
 Application for 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 grant for trial use project, please take into consideration the possible termination date of the I&T Fund.
3. 不能為同一申請項目同時申請其他政府基金。
 Duplication of different government funds to cover the same applied lending products for the I&T Fund is not allowed.
4. 申請機構填寫申請表格時，須提供個人資料。詳情請參閱各申請表內所載的《個人資料收集聲明》。
 The applicant organisation will be required to provide personal data when filling in the application form. Please refer to the “Personal Information Collection Statement” at each application form.
5. 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.
6. 符合申請的科技產品包括：
 The technology products eligible for trial use includes –
 - (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.
7. 每個申請只能購置一項產品。申請機構須提交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。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。
 Only one product can be included in each application. The application organisation should provide at least one quotation and product catalogue with details including price details, specifications, certification and required operating professional. The applicant organisation should also provide a link to demonstration (videos or photos) of the newly developed product to be sought if available.

(Please download latest version of documents from the I&T Fund website)

8. 在填寫申請表格內「服務單位類別」時，請參閱附件 2.3 所列的服務類別填寫。
Please refer to Annex 2.3 when filling in “Type of Service Unit” in the application form according to the specified and exact name of the relevant service type.
9. 遞交報價單時需注意以下各項：
Please note the following when providing quotations –
- (a) 抬頭應與申請機構／服務單位名稱相同；
the name of the applicant organisation or 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.
10. 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：
The application 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）及規例、《私營醫療機構條例》（第 633 章）、《殘疾人士院舍條例》（第 613 章）及規例和《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) and regulations, Private Healthcare Facilities Ordinance (Cap. 633), Residential Care Homes (Persons with Disabilities) Ordinance (Cap. 613) and regulations and Personal Data (Privacy) Ordinance (Cap. 486).
11. 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.
12. 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(s).
13. 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：
The applicant organisation should provide the details with supporting documents of safety compliance with the newly developed technology product provided by the collaborative partner(s), including –
- (a) 安全性及功能測試相關資料；
tests on safety and function of the product;

- (b) 未完成的安全測試內容及跟進安排（如有）；
outstanding safety tests and follow up arrangement (if any);
 - (c) 實地測試內容及提供證明文件（如有）；及
field test of the product (if any);
 - (d) 需要配合特定的設施（如無綫網絡，天花連接等）使用資料等。
required technical/physical infrastructure for the use of product, etc..
14. 申請機構須自行與協作伙伴釐清本項目成果所產生的知識產權的擬議擁有權及／或使用權誰屬。
The applicant organisation should clarify with collaborative partner(s) the proposed ownership and/or right to use the Intellectual Properties of the deliverables arising from the current project.
15. 政府或其授權使用者有權使用申請機構所提交的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 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.
16. 政府可在其認為適當時，以及在毋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及個人資料。申請機構提交申請表格，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 and 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.
17. 申請機構可透過填寫電子表格、郵寄或親身送交以下文件向樂齡及康復創科應用基金秘書處提出申請（地址：九龍深水埗元州街 290-296 號西岸國際大廈 5 樓 502 室）：
Applications can be submitted by completing a e-Form, post or in person by the applicant organisation(s) to the Secretariat to Innovation and Technology Fund for Application in Elderly and Rehabilitation Care with the following documents (Address: Room 502, 5/F, West Coast International Building, 290-296 Un Chau Street, Sham Shui Po, Kowloon.) –
- (a) 已填妥的申請表格（附件 3.1）正本兩份；
two originals of completed Application Form (Annex 3.1);
 - (b) 協作伙伴同意進行試用計劃的同意書正本兩份；
two originals of letter of consent from the collaborative partner(s).
 - (c) 技術建議書正本兩份；
two originals of technical proposal;
 - (d) 申請產品的報價單副本兩份；
two copies of Quotation of the Application Product;
 - (e) 申請產品的產品單張副本兩份；及
two copies of Catalogue of the Application Product; and
 - (f) 載有上述文件的電子副本（申請表格及技術建議書：微軟 Word 2003 或以上格式；其餘文件：PDF 格式）的光碟或 USB 儲存器。
CD-ROM Disc or USB drive containing the electronic copies of the above documents (Application

(Please download latest version of documents from the I&T Fund website)

Forms and technical proposal: in Microsoft Word 2003 or above format; Other documents: in PDF format).

18. 社署收到申請後，會向申請機構發出認收通知。

The SWD will issue acknowledgment to the applicant organisation after receipt of the application.

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\$
Income		
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
	X	X
Expenditure		
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
	X	X
Surplus / (Deficit) for the year	X	X
Surplus / (Deficit) brought forward from previous year	X	X
Balance at the end of year	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.

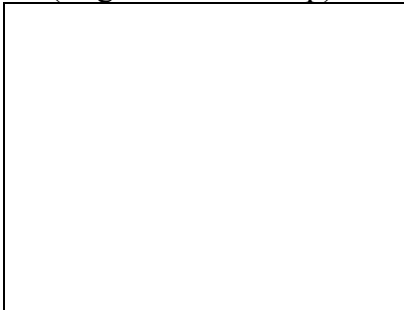
Signature(s):

Name(s):

Position(s) Held:

Date:

(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 : _____