User Procedures Manual (Application User Manual)

of the Electronic Submission System (ESS) –

PIPs Portal

For Official Receiver's Office (ORO)

Version:	**0.6**
Date:	**Dec 2023**
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Submitted By

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1. SYSTEM SUMMARY

1.1 INTRODUCTION OF ESS PIPS PORTAL

The PIPs Portal facilitates PEQ agents and OTs/OLs dealing with the tasks assigned for bankruptcy and liquidation cases. It mainly serves the purposes as below:

- Enables PEQ agents to submit the case related PEQ e-Form together with scanned supporting documents to ORO for taking necessary actions.

- Allows OTs/OLs to submit data sheets and e-Forms in response to the requests for call return made by ORO, additionally, to report and submit cases to ORO for considering prosecutions and provide supplement(s) on case referrals, if necessary.

1.2 SYSTEM FUNCTIONS

The below modules are launched in Phase 1:

- Login ESS with iAM Smart
- Case List/Case Overview
- PEQ Report Submission / Re-submission
- Generate Detailed Ledger (now for ad-hoc single case and in PDF format only, this function will be further enhanced by Q1 of 2024 to cater for batch processing and downloading of ledgers in CSV and/or PDF format as requested by PIPs)
- Return Submission
- B1/B2/B3 Submission / Re-submission
- User Account Administration

1.3 SYSTEM REQUIREMENT

Component	Requirement
Processors	2GHz processor or above
Memory	4GB or above
Hard disk	200GB SATA hard drive (5400RPM) or above
Display	At least 1280 x 720
Interface	At least 1 x Keyboard Port and 1 x Mouse Port
Operating System	Microsoft Windows 10 or above
Mobile OS	Android 10.0 or above iOS 13 or above
Network	Internet
Software	Google Chrome version 114 or above Microsoft Edge version 114 or above

Mozilla Firefox version 115 or above	

1.4   CONVENTIONS

Abbreviations/Acronyms	Description
BO	Bankruptcy Order
IEFAS	The Insolvency Estate Funds and Accounting System
ORMIS	The Official Receiver's Management Information System
ORO	Official Receiver's Office
OTP	One-Time Password
PA	Principal Account
PDD	Prosecution and Director Disqualification Section
PEQ	Preliminary Examination Questionnaire
PL/OL	Outside Provisional Liquidator /Liquidator
PIP	Private Insolvency Practitioners
PT/OT	Outside Provisional Trustee / Outside Trustee
SMS	Short Message Service

2.   OPERATIONAL PROCEDURES

2.1   Login Page

- ❖ Provide feasible login options, including (1) username and password (2) iAM Smart authentication.
- ❖ For iAM Smart authentication, the binding or system integration concerned can be performed after the login action is initiated by using the designated authentication credentials provided.

2.1.1 Login Page Layout

The following information is shown on Login Page:

No.	Function / Item	Description
1.	Logos	Titles and logos of both ORO and ESS are put in the upper left corner.
2.	Font Size	User gets redirected to the "How to Change Text Size on GovHK" web page, wherein the user could follow the instruction to change font size.
3.	Login Area	User logs in PIPs Portal with Login Name and Password, or via iAM Smart.

		User may reset password by "Forget Password" hyperlink.

2.1.2 Change Font Size

Step #	Step Details & Screen
1.	• Go to Login Page • Click the "Font Size" button in the upper right corner

2.	• Get redirected to "How to Change Text Size on GovHK" web page. • Follow the instruction to change text size
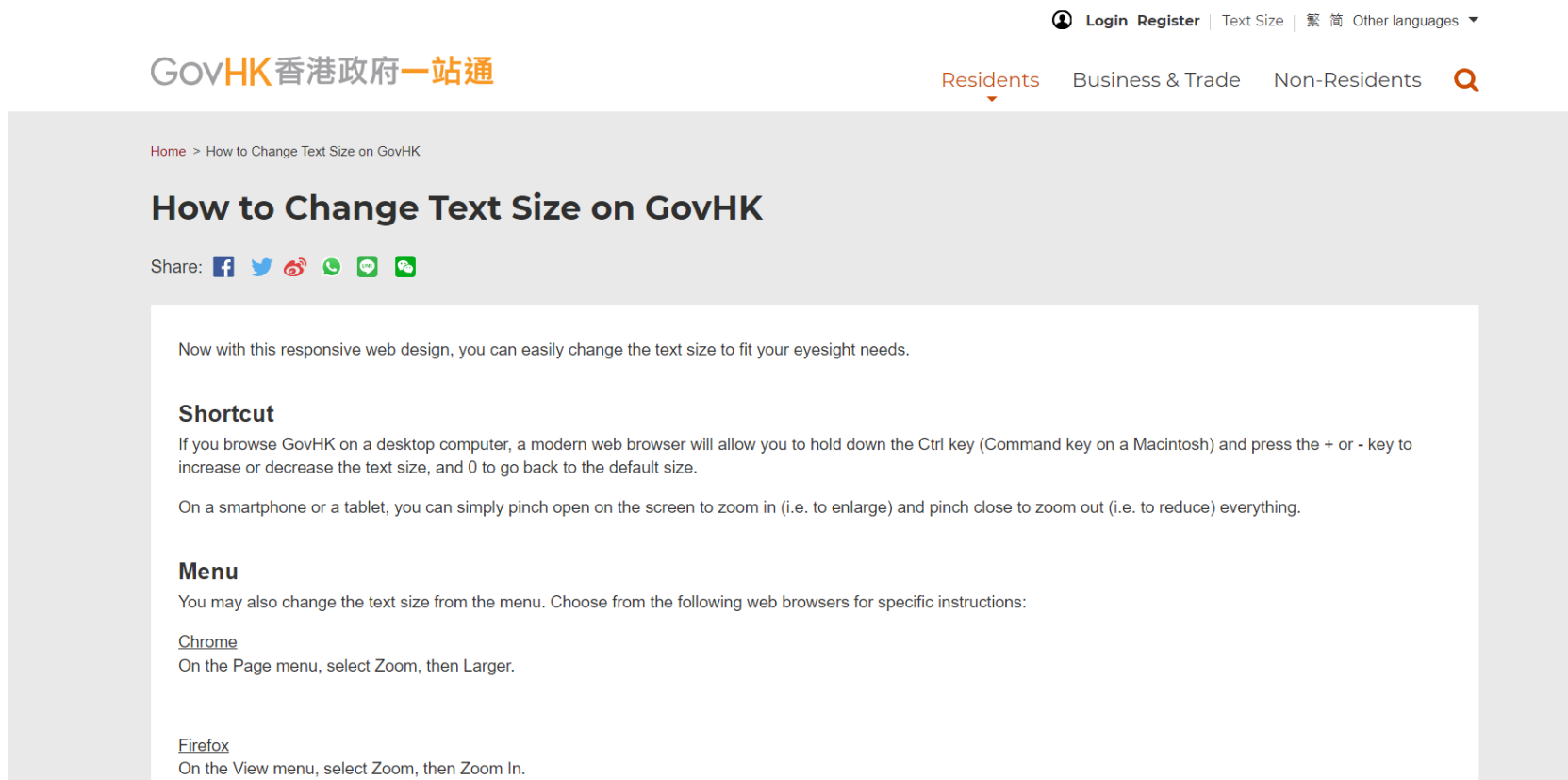
2.1.3 Login

Step #	Step Details & Screen

1.	- Log in with Login Name and Password - Type in the "Captcha" and click "Login" button. - User gets redirected to the Landing page.

2.	• Log in with iAM Smart • Scan the QR code with iAM Smart app on mobile phone
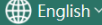
- User gets redirected to the Landing page

2.2   Landing Page

❖ Provides a comprehensive overview of the task updates and navigation to different sections.

2.2.1 Widgets

Step #	Step Details & Screen
1.	**<Create Widgets>** • Click "Create Widget" button. • Select widget type from the drop-down list (different widgets are available for different types of users)

- Click "OK" button, and the selected widget is created on the Landing page.

2.

\<Edit Widgets\>
- Click "Edit Widget" button to enter Edit Mode.

- Click "X" icon to delete the widget.
- Drag on the "⌐" icon to resize the widget.
- Click "Save" button to save the change.

3.

\<Restore Default Widgets\>
- Click "Edit Widget" button the enter Edit Mode, and click the "Restore Default Setting" button.

- Confirm to restore default widgets.

- Default widgets are restored.

2.2.2 Notifications

Step #	Step Details & Screen
1.	• Click the "Notification" button in the top navigation bar.

- System notifications pop up with the most recent ones on top.

2.	

1) Search notifications by keyword.
2) Sort out notifications by certain criteria and order.
3) Read or unread a notification (read messages will be placed at the bottom below the unread messages)
4) Delete a notification upon confirmation.

2.2.3 Left Menu

No.	Function / Item	Description	Procedure
1.	Dashboard	Return to Landing page	N/A
2.	Case Search	Full list of Bankruptcy and Liquidation cases (Available to administrator only)	2.3.1

3.	Case List (Active OT/OL)	Cases under the current active OT/OL	2.3.1
4.	Case List (Former OT/OL)	Cases under former/resigned OT/OL	2.3.1
5.	PEQ Case List	BO Made – PEQ cases with BO made. Petition – PEQ cases with Petition submitted. BO Not Made – PEQ cases without BO made.	2.4
6.	Generate Detailed Ledger	Request detailed ledgers from IEFAS.	2.5
7.	Returns Submission	Regularly submit returns to ORO	2.6
8.	B1/B2/B3 Submission	Submit B1/B2/B3 form to OR for its consideration of prosecution.	2.7
9.	Firm Management	Manage master firm(s)/AP panel firm(s)/PEQ Agent firm(s)	2.8

2.3   Case List/Case Overview

❖ Enquire the submitted data, forms (including call returns, etc.) and supporting documents from the e-Folder of case, which is maintained on both Intranet and PIPs Portals.

❖ Allow ESS users (including PEQ agents and PIPs) to browse e-case folder, which contains scanned copy of petitions, Statement of Affairs, PEQ report forms, B1/B2/B3 forms, and other documents uploaded.

2.3.1 Case List(s)

Step #	Step Details & Screen
1.	• Log in PIPs Portal as PA/SA/UA

- Click "Case List" via left menu (2 categories – Active OT/OL and Former OT/OL, are provided)

2.

- Search Case – select/input search criteria and click "Search" button.

- The cases searched are shown below.

3.

- Click "View" button under the Action column on the right.

Case Type ⇅	Case No ⇅	Case Year ⇅	Case Name ⇅	Bankruptcy / Winding up Order Date ⇅	Tender	Action
B	▪▪	2017	▪ ▪ ▪ J	28/03/2017	N/A	👁
B		2017	⊢	28/03/2017	N/A	👁
B	▪	2017	C▪ ▪ ▪	28/03/2017	N/A	👁
B	▪	2017	⌐ ▪ ▪▪	06/04/2017	N/A	👁
B	▪▪	2017	▪ ▪▪	14/02/2017	12(1A)	👁
B	▪	2017	' ▪▪ ▪ ▪	28/03/2017	N/A	👁
B	▪▪	2017	Y ▪ ▪ ▪ ▪	28/03/2017	N/A	👁
B	▪▪	2017	'▪ ▪ ▪	28/03/2017	N/A	👁

- "Case Overview" is opened

2.3.2 Case Overview

Step #	Step Details & Screen
1.	- Case Information – Case basic information is shown by default.

| 2. | • Petition – Petition information is shown. |

3.	• Debtor Information – Debtor information is shown.

4	• Important Date – Important dates of the case at different stages are shown.

| 5 | • Prosecution Referral – Referral history is shown (only keeps referral forms submitted via this Electronic Submission System)
 |

6	• Trustee / Liquidator Information (if any)

7	• PEQ – PEQ-related information is shown (Inputting interview date & time/ submitting PEQ report will be illustrated in later chapter)

2.3.3 e-Case File

Step #	Step Details & Screen
1.	• All case files are shown.

- Below options of action buttons are available.

  Action 1 - View document details.

  Action 2 - Open document in web viewer.

  Action 3 – Download document to local.

2.	• Upload Document – Create Electronic Document/Create Physical Document

2.3.4 Activity History

Step #	Step Details & Screen
1.	• Activity History – Case activities are shown in descending order.

2.4   PEQ Submission

❖ Facilitate the submission of the PEQ report with the scanned supporting documents by the PEQ agent by classifying the cases assigned into BO made, Petition (i.e. pending hearing of BO) and BO not made (i.e. hearing of BO completed but BO not made).

2.4.1 Update Interview Date & Time

Step #	Step Details & Screen
1.	• Log in PIPs Portal as PEQ Agent, • Expand PEQ Case List in the left menu. ❖ BO Made – PEQ cases with BO (Bankruptcy Order) made. ❖ Petition – PEQ cases with Petition submitted. ❖ BO Not Made – PEQ cases without BO made.

2.

- Click "View" button under "Action" column and open the Case Overview

3

- Click "PEQ" to open PEQ workspace

- Select "Yes" to "Interview"

- Select a date and time from the date-picker as Interview Date & Time, and click "Save" button.

2.4.2 Update Reason(s) for Outstanding Interview/Submission

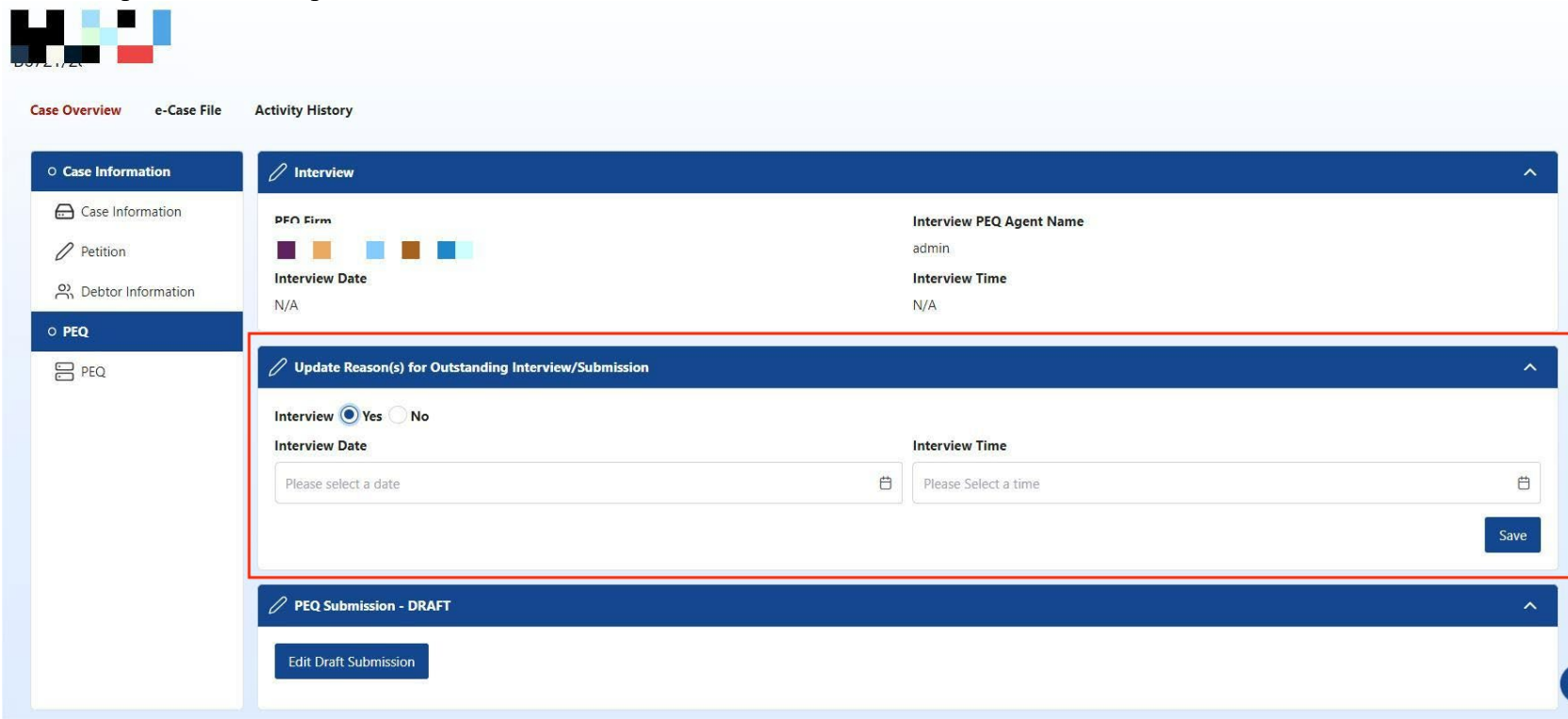| Step #	Step Details & Screen

1	• Open PEQ workspace
	
	Case Overview e-Case File Activity History
	
	○ Case Information
	  🖶 Case Information
	  ✎ Petition
	  👥 Debtor Information
	
	○ PEQ
	  🗄 PEQ
	
	✎ **Interview**
	PEQ Firm Interview PEQ Agent Name
	                            admin
	Interview Date Interview Time
	N/A N/A
	
	✎ **Update Reason(s) for Outstanding Interview/Submission**
	Interview ⦿ Yes ◯ No
	Interview Date Interview Time
	Please select a date 📅 Please Select a time 📅
	                                              Save
	
	✎ **PEQ Submission - DRAFT**
	Edit Draft Submission
	
	• Select "No" to "Interview" under "Update Reason(s) for Outstanding Interview / Submission

- Input the reason(s) for outstanding interview or submission, and click "Save" button.

2.4.3 Submit PEQ Report

Step #	Step Details & Screen
1	• Open PEQ tab under Case Overview

- Click "Go to PEQ Submission" button under "PEQ Submission".

2	- Fill form – fill in the required information

- Click "Save as draft" any time to save your work.

- Click "Next" to go to the next page.

3	• Upload Documents – Upload Required documents (currently 4) and other document(s), if any

Fill Form	Upload Documents	Preview

Required Documents

Document Type	File Name	Uploaded Date and Time	Action
Acknowledged Receipt of the simple guides (EA/B-12)	Plan Index-A0-Same-07.pdf	03/12/2023 23:41	🗑
Completed and signed preliminary examination questionnaire (EA/B-11)	Plan_Paper Size_A3.pdf	03/12/2023 23:42	🗑
Completed and signed statement of the bankrupt's monthly income and expenditure (EA/B-7Aa) for the assessment of monthly financial contributions	Scanned_300DPI_A3.pdf	03/12/2023 23:42	🗑
Completed Table to EA/B-7AB			⬆

Other Documents   Update other document(s)   ✎ Edit

Document Type	File Name	Uploaded Date and Time
List of other things together with those things collected from the bankrupt	Scanned_400DPI_A3.pdf	03/12/2023 23:45

Back   Save as Draft   Preview   Next

4	• Preview – preview and confirm to submit.

Fill Form	Upload Documents	Preview

Report on Preliminary Examination
Fields marked with * are mandatory

✎ Edit

Basic Information

Date of initial interview*	01/12/2023
Time of initial interview*	23:29 to 23:36
Place of initial interview	
Name of bankrupt interviewed	
Bankrupt's telephone number *	1234
Interviewer's name*	
Interviewer's post	
Interviewer's telephone number*	8765

Follow Up

Assets to be followed Up (e.g. seizure,realization, etc.)*	1

- Click "Submit to OR" to submit by PA user.

Other Documents

Document Type	File Name	Uploaded Date and Time
List of documents together with those documents (paper form and electronic form) collected from the bankrupt	20231109_S1941A_Long_OS_ActiveCases_Template(2).xlsx	24/11/2023 10:11
	20231109_S1941A_SPO_Meeting_Result_(2).xlsx	24/11/2023 10:11
List of other things together with those things collected from the bankrupt	20231109_S1941A_SPO_Meeting_Result_(1)(1).xlsx	24/11/2023 10:11
Special report about the initial interview	20231109_S1941A_SPO_Meeting_Result.xlsx	24/11/2023 10:11

ACKNOWLEDGEMENT

1. I hereby acknowledge that I have collected and examined the completed and signed preliminary examination questionnaire and all documents provided by the bankrupt in relation to his/her bankruptcy. I confirm that the information provided to the Official Receiver are accurate and complete.
2. I undertake to provide any further assistance to the Official Receiver as required in connection with the PEQ Documents submitted
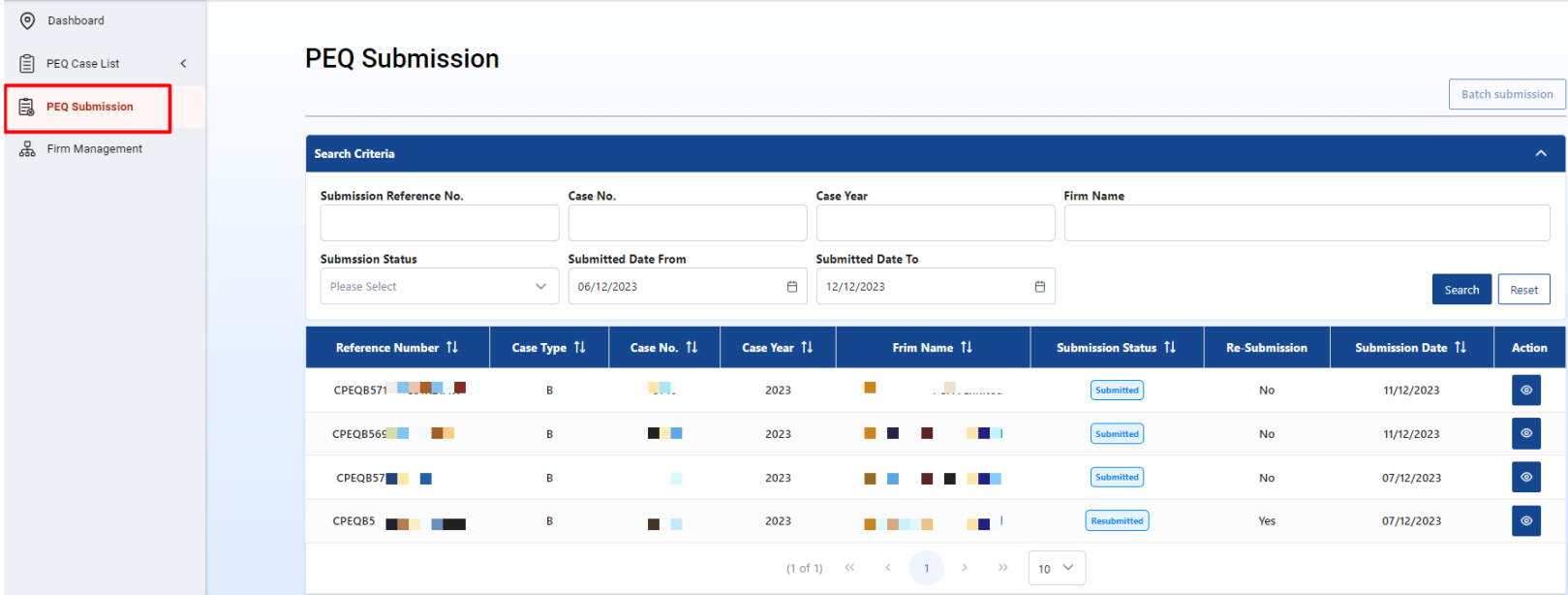
Return to Preparer   Submit to OR

2.4.4 PEQ Submission Summary

Step #	Step Details & Screen
1.	• Log in PIPs Portal as PEQ Agent. • Go to "PEQ Submission" for the cases submitted/resubmitted to OR

2.5 Generate Detailed Ledger

❖ Allow ESS users to request for detailed ledgers of a certain case from IEFAS via interface and upon receipt of system notification, download the detailed ledger in CSV and/or PDF format within 1-2 working days. Currently, the features of this function have not been completed and

user can only request for detailed ledger for ad-hoc single case in PDF format only. It is expected to complete all the features of this function by Q1 of 2024.

Step #	Step Details & Screen
1.	• Log in PIPs Portal as Principal Account • Go to "Generate Detail Ledger" via the left menu • Fill in the required information and click "Request"

2.	‹ Back ## Generate Detailed Ledger ### Generate Detailed Ledger **Report Type** Detailed Ledger Report **Case Number** B12345/1234 **Report Period(From/to)** [🗓] - [🗓] **Report Format** ○ PDF [Clear] [Request] • The request to generate detailed ledger is interfaced to IEFAS, and the status of the request is updated as "Pending".

Detailed Ledger History

Requested Date ↑↓	Detailed Ledger Name ↑↓	Case ID ↑↓	Status ↑↓	Received Date ↑↓	Expiry Date ↑↓	Action
04/12/2023	Detailed Ledger_04/12/23_03	15	Ready for download	04/12/2023	03/01/2024	⬇
05/12/2023	Detailed Ledger_05/12/23_02	/2018	Ready for download	05/12/2023	04/01/2024	⬇
07/12/2023	Detailed Ledger_07/12/23_01	2015	Pending	-	06/01/2024	
07/12/2023	Detailed Ledger_07/12/23_02	2015	Pending	-	06/01/2024	
07/12/2023	Detailed Ledger_07/12/23_03	2015	Pending	-	06/01/2024	
07/12/2023	Detailed Ledger_07/12/23_04	2015	Pending	-	06/01/2024	
07/12/2023	Detailed Ledger_07/12/23_05	2015	Pending	-	06/01/2024	
07/12/2023	Detailed Ledger_07/12/23_06	, 2015	Pending	-	06/01/2024	

(2 of 2) « ‹ 1 2 › » 10 ⌄

3.

- Once the requested detailed ledger is ready for download, the status of request will be updated to "Ready for Download" by the system.

Detailed Ledger History

Requested Date ↑↓	Detailed Ledger Name ↑↓	Case ID ↑↓	Status ↑↓	Received Date ↑↓	Expiry Date ↑↓	Action
04/12/2023	Detailed Ledger_04/12/23_03	15	Ready for download	04/12/2023	03/01/2024	⬇
05/12/2023	Detailed Ledger_05/12/23_02	/2018	Ready for download	05/12/2023	04/01/2024	⬇
07/12/2023	Detailed Ledger_07/12/23_01	/2015	Pending	-	06/01/2024	
07/12/2023	Detailed Ledger_07/12/23_02	2015	Pending	-	06/01/2024	
07/12/2023	Detailed Ledger_07/12/23_03	15	Pending	-	06/01/2024	
07/12/2023	Detailed Ledger_07/12/23_04	/2015	Pending	-	06/01/2024	
07/12/2023	Detailed Ledger_07/12/23_05	2015	Pending	-	06/01/2024	
07/12/2023	Detailed Ledger_07/12/23_06	/2015	Pending	-	06/01/2024	

(2 of 2) « ‹ 1 2 › » 10 ⌄

- Click "Download" button and the requested detailed ledger will be downloaded to the requestor's local as a zip file.

2.6   Return Submission

- Enable ESS users (including PTs/OTs and PLs/OLs) to submit call return e-Forms in response to the requests following the general procedures for handling call return.

- Perform call return e-Form validation according to the prescribed and built-in data validation and business rules.

- Synchronize the data (including statistical data and SPO application date / 1st GMC date, etc. where appropriate) to the ORMIS and trigger the ORMIS to update the transferred data therein after ESS users (i.e. PTs/OTs and PLs/OLs) submitted call return e-Forms as requested.

	Return Type	Return-Triggered Day

1.	S.12(1A) - Combined Monthly Information Sheet & Release and Dividend	The 1st day of each month (monthly)
2.	S.12(1A) - SPO or Creditors' Meeting Information Sheet	The 1st day of each month (monthly)
3.	S.12(1A) - Monthly Return on Estate Account Balances and Dividend Declared	The 1st day of each month (monthly)
4.	OT - Monthly Return of Release and Dividend Cases	The 1st day of each month (monthly)
5.	OT - Monthly Return on Estate Account Balances and Dividend Declared	The 1st day of each month (monthly)
6.	OT cases - Statistical data	The 1st day of each month (monthly)
7.	S.194(1A) - SPO Application / First Meetings	Every Friday upon requests from ORO
8.	S.194(1A) - Outstanding appointment of liquidators	Every 3 Weeks on Monday (21 days)
9.	S.194(1A) - Long outstanding active cases	The 1st day of each month (monthly)
10.	OT cases - Outstanding discharge	The 1st day of each month (monthly)

Step #	Step Details & Screen
1.	• Log in PIPs Portal as PA/SA/UA • Click "Return Submission" via left menu.

- Click "Download template" button under "Action" Column to download the return template in excel format.

2.

- Open the template downloaded and fill in the required data.

- Save the file.

3	- Click "Upload template" button under "Action" column. - Read "General Information" and upload the filled-out return. - Click "Read & Continue" button. - The filled-out return will get validated by system, only the verified ones (i.e. without violation of validation rules) can be uploaded successfully.

| 4 | • After the return is successfully submitted, the status of the return will be updated to "Uploaded" by the system

Returns Submission
Call Return List

<table><tr><th>Call Date</th><th>Firm English Name</th><th>Firm Chinese Name</th><th>Call Return Type</th><th>Status</th><th>Last Updated</th><th>Action</th></tr><tr><td>04/12/2023</td><td>Firm H</td><td>Firm H</td><td>S.12(1A) - Combined Monthly Information Sheet & Release and Dividend</td><td>Pending</td><td>04/12/2023 10:24</td><td></td></tr><tr><td>24/11/2023</td><td>Firm H</td><td>Firm H</td><td>S.194(1A) - SPO Application / First Meetings</td><td>Uploaded</td><td>24/11/2023 15:36</td><td></td></tr><tr><td>17/11/2023</td><td>Firm H</td><td>Firm H</td><td>S.12(1A) - Statistical Data</td><td>Uploaded</td><td>20/11/2023 13:25</td><td></td></tr><tr><td>17/11/2023</td><td>Firm H</td><td>Firm H</td><td>S.194(1A) - Outstanding appointment of liquidators</td><td>Uploaded</td><td>30/11/2023 16:17</td><td></td></tr><tr><td>15/11/2023</td><td>Firm H</td><td>Firm H</td><td>S.194(1A) - Outstanding appointment of liquidators</td><td>Uploaded</td><td>15/11/2023 15:09</td><td></td></tr></table>
• Click "View submission" button under "Action" column to download the submitted return. |

2.7   B1/B2/B3 Submission
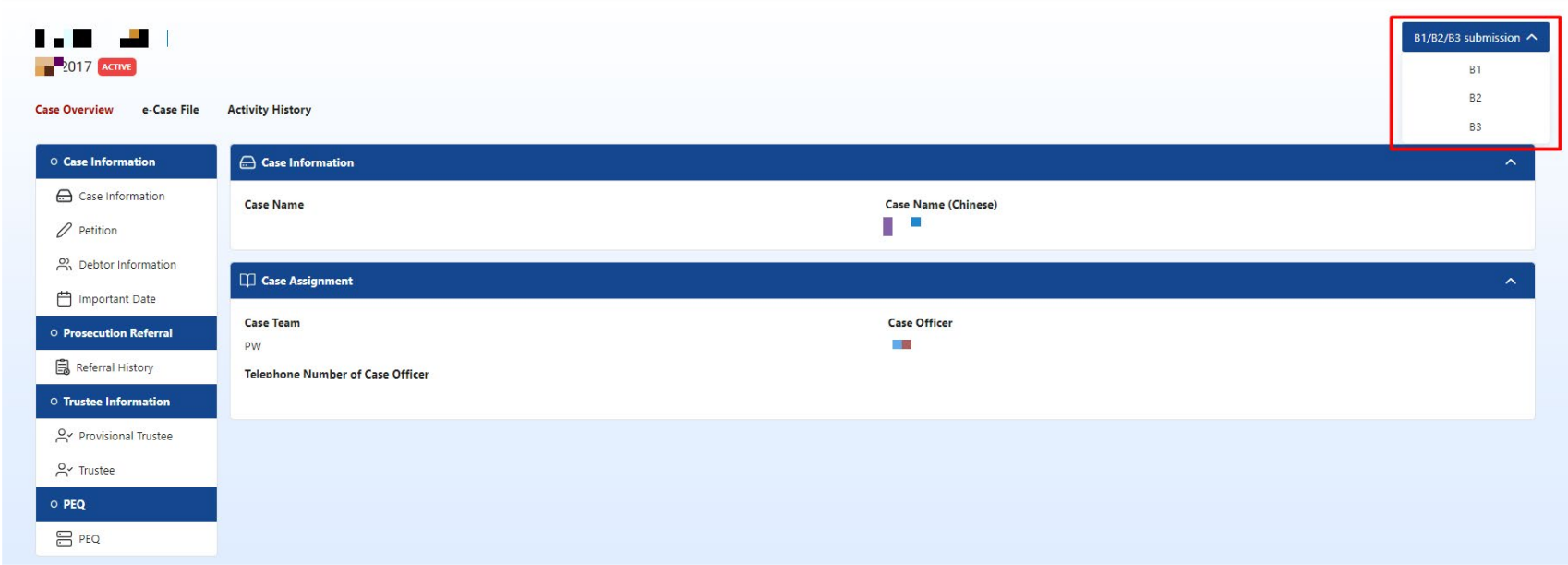
❖ Allow PTs/OTs to refer cases with possible bankruptcy offences to OR (by Form B1/B2/B3) for considering prosecutions and providing supporting documents(s) on case referrals, if necessary.

❖ Perform e-Form validation according to the prescribed and built-in data validation and business rules.

2.7.1 Submit B1/B2/B3 Form

Step #	Step Details & Screen
1.	• Log in PIPs Portal as PA/SA/UA • Find out the case and open Case Overview

- Select B1 or B2 or B3 from the "B1/B2/B3 Submission" drop-down

2.

- Fill form – fill out the required information

Fill Form	Upload Document(s)	Preview

Form B1
REPORT ON CONDUCT OF BANKRUPT UNDER SECTION 86A OF THE BANKRUPTCY ORDINANCE (CAP.6)

To: Official Receiver (Attn: Prosecution & Directors Disqual Section)

Ref

Name of the Bankrupt

Date of petition

20/05/2015

○ self ● creditor

Date of bankruptcy order

26/08/2015

Latest address of Bankrupt

123 ABC

- Upload document(s) – upload supporting documents.

3	

4	• Preview - preview submission draft **Supporting Document(s)** | Documentation Type	File Name	Description	Uploaded Date and Time | |---|---|---|---| | Acknowledgement of Receipt | Letter to BD Officer.pdf | | 13/11/2023 15:31 | | Annual Statement of Earnings and Property Acquired | Plan Index-A0-Same-09.pdf | | 13/11/2023 15:33 | | Complaint letter | Site Inspection Report.pdf | | 13/11/2023 15:30 | | Preliminary Examination of Bankrupt | Plan Index-A0-Same-07.pdf | | 13/11/2023 15:33 | (1 of 1) « ‹ 1 › » Back Save as draft Submit to trustee(s) Submit to OR • Click "Submit to OR" to submit (available only to PA users) • Click "Submit to trustee(s)" to submit to the PA account for review and process (available to PA/SA/UA users)

2.7.2 B1/B2/B3 Submission Summary

Step #	Step Details & Screen
1.	• Log in PIPs Portal as PA/SA/UA • Click "B1/B2/B3 Submission" via left menu

2.

- For the "submitted" submission

Below options of actions are available:

❖ Re-submit - to submit a revised form to OR, status of submission will be updated to "draft" by the system.

❖ View history - all submissions are shown.

❖ Follow up (only B2) - to communicate with ORO officer by sending message and uploading documents

B2

Batch submission

Status: Please

Reset

Case No. ↑↓				Action
2014				
018				
2018				
014				
2014				
2017				
017				

Follow up message ✕

To: Official Receiver (Attn: Prosecution & Directors Disqual Section)
Ref : of 2014

⬆ Drop files here or click to upload.

Accepted file types: .doc, .docx, .xls, .xlsx, .jpg, .jpeg, .pdf
Upload document is limited size of 25 MB

Cancel   Submit

Message here...

0/2000

Submitted Date	Submitted By	Upload Document	Message
15/12/2023	Admin of Limited	Site Inspection Report.pdf	

B3

Batch submission

Status: Please Select ⌄

Enter case no. or case name to search the referral records   Reset

3

- For the "draft" submission

Below options of actions are available:
- ❖ Edit Form - to continue editing form
- ❖ Withdraw Re-submission - to withdraw the re-submission request, status of submission will be reverted to "submitted" by the system.
- ❖ View history - All submissions are shown.

❖ Follow up (only B2) - to communicate with ORO officer by sending message and uploading documents

B2

Batch submission

Status: Please

Reset

Case No. ↑↓		Action

Follow up message   ✕

To: Official Receiver (Attn: Prosecution & Directors Disqual Section)
Ref. ▓▓▓ of 2014

⬆ Drop files here or click to upload.

Accepted file types: *.doc, .docx, .xls, .xlsx, .jpg, .jpeg, .pdf*
Upload document is limited size of 25 MB

Cancel   Submit

Message here...

0/2000

Submitted Date	Submitted By	Upload Document	Message
15/12/2023	Admin of ▓▓▓▓▓ Limited	Site Inspection Report.pdf	

B3

Batch submission

Status: Please Select ▼   Enter case no. or case name to search the referral records 🔍   Reset

4	• For the "Ready for trustee(s)' review" submission

Below options of actions are available:

❖ View Form - view the submission draft, and click "Submit to OR" if appropriate.

❖ Withdraw Re-submission - to withdraw the re-submission request, status of submission will be reverted to "submitted" by the system.

❖ Return to preparer for amendment - return the draft to its preparer for amendment.

❖ View history - All submissions are shown.

❖ Follow up (only B2) - to communicate with ORO officer by sending message and uploading documents

B2

Batch submission

Status: Please

Reset

Case No. ⇅				Action

Follow up message ✕

To: Official Receiver (Attn: Prosecution & Directors Disqual Section)
Ref. ▇▇▇ of 2014

⬆ Drop files here or click to upload.

Accepted file types: .doc, .docx, .xls, .xlsx, .jpg, .jpeg, .pdf
Upload document is limited size of 25 MB

Cancel   Submit

Message here...

0/2000

Submitted Date	Submitted By	Upload Document	Message
15/12/2023	Admin of ▇▇▇ Limited	Site Inspection Report.pdf	

B3

Batch submission

Status: Please Select ⌄

Enter case no. or case name to search the referral records

Reset

5	• For the "Pending preparer's amendment" submission

Below options of actions are available:

❖ Edit Form - to continue editing form
❖ Withdraw Re-submission - to withdraw the re-submission request, status of submission will be reverted to "submitted" by the system.
❖ View history - All submissions are shown.

❖ Follow up (only B2) - to communicate with ORO officer by sending message and uploading documents

2.8   Firm Management

❖   Enable PIP administrator to maintain, enquire, list and search the PIP users on the PIPs Portal.

❖   Maximum number of active PIP user accounts is configurable and maintained under the custody of one PIP administrator.
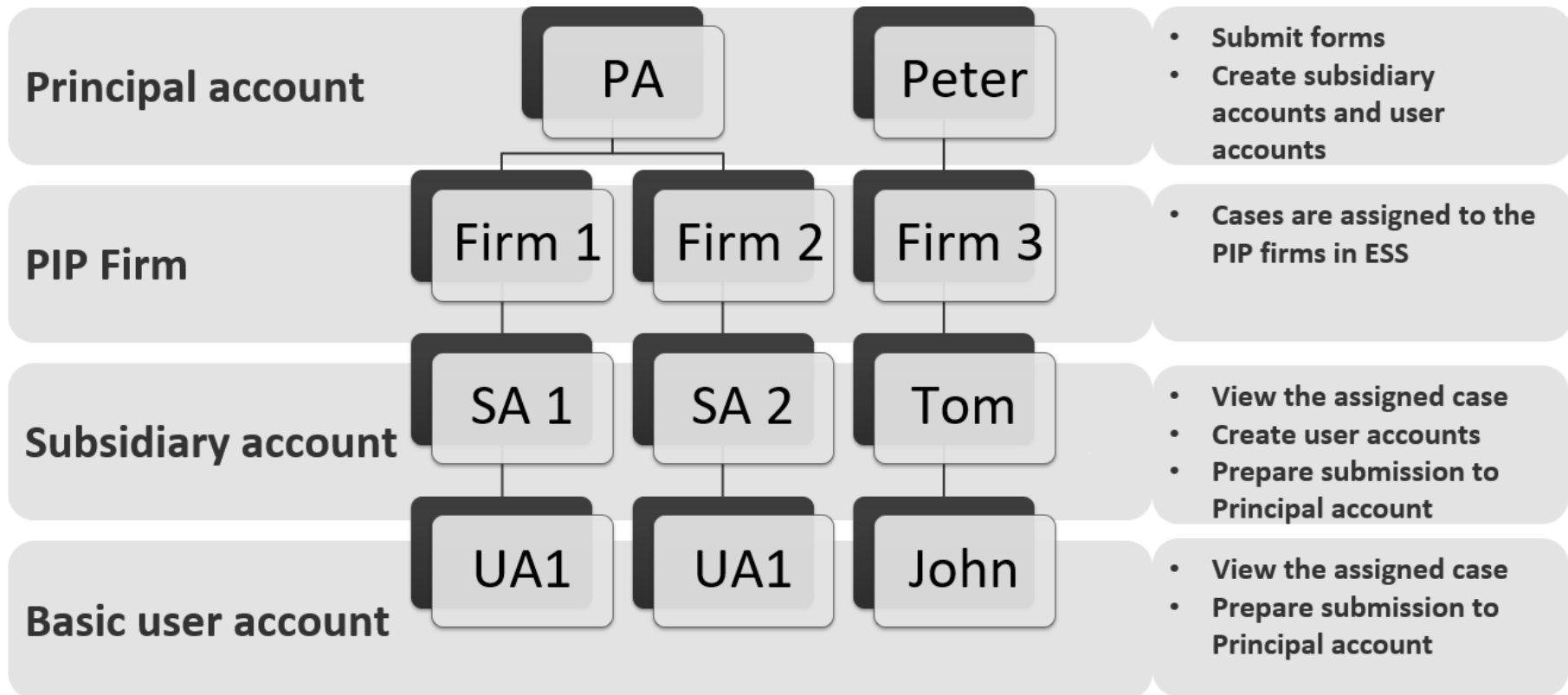
Step #	Step Details & Screen

1	• Log in PIPs Portal as PA • Click "Firm Management" on left menu < Back **Firm Management** Firm List

< Back

Firm Management

Firm List

Name(Cht) ↑↓	Name(Eng) ↑↓	Action
Firm H	Firm H	👁

(1 of 1) « ‹ 1 › » 10 ⌄

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2	<View Assigned User>

Assigned user(s)   + Add User

Login Name ↑↓	Full Name ↑↓	User Type ↑↓	Email ↑↓	Active ↑↓	Action
pip_h_pa	pip_h_pa Doe	Principal Account	▓▓▓example.com	Active	View
pip_h_sa	pip_h_sa	Subsidiary account	▓ ▓@example.com	Active	View
pip_h_ua	pip_h_ua	User account	▓ ▓example.com	Active	View
userY	User X	Principal Account	▓▓.@x.com	Active	View
PA_28	PA 28	Principal Account	nip_es▓ ▓@oro.gov.hk	Active	View
PA_29	PA 29	Principal Account	▓▓▓@oro.gov.hk	Active	View
PA_30	PA 30	Principal Account	▓▓▓@oro.gov.hk	Active	View
PA_31	PA 31	Principal Account	▓ ▓▓oro.gov.hk	Active	View
PA_32	PA 32	Principal Account	▓▓ ▓.@oro.gov.hk	Active	View
PA_118	PA 118	Principal Account	▓▓▓ @oro.gov.hk	Active	View

No. of Result : 12   « ‹ 1 2 › »

- Click "View" button to view user details, and update user "Status" if necessary.

- Click "+Add User" button to add new user to the firm

Add new user ✕

Login Name*

Type here

Name*

Type here

Email*

example@com.hk

Phone

Type here

HKID

A1234567

User Type*

Select User Type ⌄

Cancel   Add

(The End)