

Checklist on Common Administrative Issues in Aided Schools

Points to note:

1. The common administrative issues listed below are only for the general reference of aided schools. For the details of the issues and any other issue not included below, staff of aided schools should consult their respective Senior School Development Officers.
2. The updated parts are marked in red.

Index

(I) Learning and Instructional Matters
(A) Enhancing Students' Learning
1. <u>Submission of holiday list in the form of school calendar and time-tables</u>

(II) Students Matters
(A) Admission, Attendance and Absence, Dropout, Transfer
2. <u>Admission of students (other than allocation of places in Primary 1, Secondary 1 and Secondary 4) and upholding students' right to education</u>
(B) Records, Promotion, Repetition and Progression
3. <u>Promotion of students</u>
4. <u>Maximum rate of repetition</u>

5.	<u>Pupils taking more than seven years to complete six-year primary course</u>
(C) Discipline	
6.	<u>Suspension of students</u>
7.	<u>Expulsion of students at senior secondary level with full justification acceptable to the Permanent Secretary for Education</u>
8.	<u>Expulsion of students aged under 15 years at or below junior secondary level</u>

(III) Planning, School Self-evaluation and Budgeting	
(A) Planning and School Self-evaluation	
9.	<u>Uploading the endorsed Capacity Enhancement Grant Plan, School Development Plan, Annual School Plan and School Report to the school website</u>

(IV) School Finance Matters	
(A) School Revenue	
10.	<u>Class structure and expansion of school by operating additional classes</u>
11.	<u>Rent, Government Rent and Rates reimbursement actually paid for school purposes</u>
12.	<u>Transfer of Special Domain surpluses to Administration Grant/ Revised Administration Grant for meeting contractual obligation to the continued employment of janitor / clerical staff</u>
13.	<u>Collection of subscription/ tong fai</u>
14.	<u>Collection of boarding fees</u>

15.	<u>Collection of fees and charges (other than boarding fee and subscription/ tong fai) exceeding the approved ceiling as stipulated by EDB for educational use</u>
16.	<u>Fund-raising activities under the conditions specified by EDB</u>
17.	<u>Acceptance of advantages and donations</u>
18.	<u>Acceptance of donation which may incur recurrent government expenditure</u>
19.	<u>Hire of accommodation</u>
(B) Trading Operations	
20.	<u>Conducting trading operations</u>
21.	<u>Acceptance of donations or advantages from trading operators/ suppliers</u>
22.	<u>Sale of textbooks on school premises</u>
23.	<u>Delegation of trading operations to Parent-Teacher Association (PTA) or School Sponsoring Body (SSB)</u>
(C) Procurement of Stores and Services	
24.	<u>Inviting, vetting and approving quotations/tenders</u>
25.	<u>Appointment of different persons to handle the opening and vetting of written quotations/tenders as well as approval of tenders</u>
26.	<u>Insufficient number of suppliers invited</u>
27.	<u>Sub-contracting to third party by the supplier/contractor</u>
(D) Internal Control	
28.	<u>Disposal of records of books of accounts of permanent nature</u>

(V) Personnel Matters	
(A) Appointment, Regrading, Promotion and Acting Appointment	
(i) Appointment and Allocation of Teaching Staff	
29.	<u>Appointment of teaching staff (excluding school head and certain types of staff as specified in Codes of Aid)</u>
30.	<u>Appointment of school head/principal</u> [Note: Schools should read this item in conjunction with item 47 of this checklist.]
31.	<u>Direct appointment of teachers and other staff to promotion ranks</u> [Note: For aided primary schools under a sponsoring body with more than one aided primary school, confirmation with EDB on the available promotion teaching vacancies is required.]
32.	<u>Appointment of substitute teachers (daily-rated supply and monthly-paid temporary teachers)</u> (excluding temporary Native-speaking English Teachers (NETs))
33.	<u>Appointment and re-appointment of Native-speaking English Teachers (NETs) under the Enhanced NET Scheme in Secondary Schools and the NET Scheme in Primary Schools</u>
34.	<u>Appointment of temporary Native-speaking English Teachers (NETs)</u>
35.	<u>Appointment of English and Putonghua teachers (in relation to the Language Proficiency Requirement for teachers of English/ Putonghua)</u>
36.	<u>Appointment of English and Chinese teachers (in relation to the Recommendations of SCOLAR on Language Teacher Education and Qualifications)</u>
37.	<u>Optimising the Use of Teaching Manpower Resources</u>
38.	<u>Deployment of redundant teachers/ over-ranked school heads/ redundant senior teachers/ excess graduate teachers</u>
(ii) Regrading	
39.	<u>Regrading to graduate teaching posts</u>

(iii) Appointment of Non-teaching Staff	
40.	<u>Appointment of Educational Psychologists</u>
41.	<u>Employment of temporary replacements of Educational Psychologists</u>
42.	<u>Appointment of Assistant Social Work Officers</u>
43.	<u>Employment of temporary replacement of Assistant Social Work Officers</u>
44.	<u>Direct appointment of Laboratory Technician II</u>
45.	<u>Appointment of School Executive Officers</u>
46.	<u>Appointment of clerical and janitor staff</u>
(iv) Promotion and Acting Appointment	
47.	<u>Promotion to school head</u> [Note: Schools should read this item in conjunction with item 30 of this checklist.]
48.	<u>Promotion to senior teaching posts other than school head</u>
49.	<u>Promotion of Educational Psychologists</u>
50.	<u>Promotion of Laboratory Technicians</u>
51.	<u>Training requirements for promotion</u>
52.	<u>Acting appointment to fill vacant posts for substantive appointment</u>
53.	<u>Acting appointment for administrative convenience to approved functional posts which are left vacant for not less than 30 consecutive calendar days (excluding the school head post)</u>
(B) Administrative Procedure for the Appointment of School Staff	

54.	<u>Assessing salaries for teaching and non-teaching staff according to the salary scales as laid down in the Codes of Aid</u>
55.	<u>Approving responsibility / acting allowance, and special education allowance for teachers</u>
56.	<u>Rectification of overpayment or underpayment of salaries to teachers</u>
57.	<u>Handling Long Service Payment/ Severance Payment for school staff</u>
58.	<u>Permission on taking teaching experience earned outside Hong Kong for incremental credit on appointment</u>
59.	<u>Permission on retention of existing salary for stepped-down teaching staff</u>
60.	<u>Payment of Salary for August (for teachers with less than one academic year of service)</u>
(C) Rights and Benefits of School Employees	
(i) Staff Safety and Staff Injured on Duty	
61.	<u>Staff injured on duty</u>
(ii) Leave Matters (Teaching Staff and School Heads)	
62.	<u>Submission of leave record of teaching staff annually for endorsement</u>
63.	<u>Paid or no-pay sick leave, maternity leave, special tuberculosis leave, paid study leave endorsed by EDB in advance and paid paternity leave</u>
64.	<u>Paid special leave (maximum 2 days per school year)</u>
65.	<u>Paid leave for serving as jurors or witnesses</u>
66.	<u>Paid leave for special events as specified (maximum 14 days per school year)</u>
67.	<u>No-pay leave (excluding no-pay sick/ maternity/ special tuberculosis leave)</u>
68.	<u>Paid study leave which has not been endorsed by EDB in advance</u>

69.	<u>Other types of leaves which are not specified above</u>
(iii) Leave Matters (Laboratory Technicians, Specialist Staff and School Executive Officers)	
70.	<u>Paid annual leave</u>
71.	<u>Paid or no-pay sick leave, maternity leave, special tuberculosis leave, paid study leave endorsed by EDB in advance and paid paternity leave</u>
72.	<u>Paid leave for serving as jurors or witnesses</u>
73.	<u>Paid study leave which has not been endorsed by EDB in advance</u>
(iv) Leave Matters (Other Non-teaching Staff)	
74.	<u>Various types of leave in accordance with the Employment Ordinance, Codes of Aid and guidelines issued by the EDB from time to time</u>
75.	<u>Annual leave for other non-teaching staff in special schools such as house-parents, nurses, cooks and the like if their leave cannot be staggered</u>
(v) Provident Fund Scheme	
76.	<u>Keeping teachers' Provident Fund Account open</u>
(D) Staff Conduct and Discipline	
77.	<u>Teaching staff taking up paid or no-pay outside duties</u>
78.	<u>Suspension of teachers from normal duties</u>
79.	<u>Termination of service / Non-renewal of contracts</u>
80.	<u>Summary dismissal</u>
81.	<u>Withholding salary increment due to unsatisfactory performance</u>
82.	<u>Staff required to step down to a lower rank for reasons other than reduction of classes</u>

(E) Staff Resignation, Retirement and Extension of Services	
83.	<u>Staff tendering resignation or due for retirement</u>
84.	<u>Waiver of salary payment in lieu of notice upon resignation of teaching staff</u>
85.	<u>Extension of service of principals, teachers, Educational Psychologists, Assistant Social Work Officers, Laboratory Technicians and School Executive Officers after the end of the school year in which they reach the age of sixty</u>

(VI) School Premises and Safety Management	
(A) Use of School Premises	
86.	<u>Use of school premises other than approved activities of the school</u>
(B) Maintenance of School Premises	
87.	<u>Capital subvention for major repairs/emergency repairs</u>
(C) Alterations to School Premises	
88.	<u>Change of room use without structural alteration</u>
89.	<u>Conversion work with structural alteration</u>

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
(I) Learning and Instructional Matters				
(A) Enhancing Students’ Learning				
1. Submission of holiday list in the form of school calendar and time-tables	EDB	EDB	<u>ER</u> COA <u>[P]</u> COA <u>[S]</u> COA <u>[Sp]</u> COA <u>[A]</u> <u>SAG</u> Cir	R79, R80, R81, R82, R83, R92 App1, para 19. 22-23, 25-26 App1, para 19. 22-23, 25-26 App1, para 18, 21-22, 24 & 26 S15.3 Appendix of Chap 2 <u>EDBC No. 7/2005, EDBCM No. 155/2024</u>
(II) Student Matters				
(A) Admission, Attendance and Absence, Dropout, Transfer				
2. Admission of students (other than allocation of places in Primary 1, Secondary 1 and Secondary 4) and upholding students’ right to education	School	School	<u>EO</u> COA <u>[P]</u> COA <u>[S]</u> COA <u>[Sp]</u> COA <u>[A]</u> <u>SAG</u> Cir	S74 S43, App 1 para 11 S43, App 1 para 11 & 15 S48, App 1 para 11 S15.1 S3.2.1, S3.2.3 <u>EDBC No. 21/2024, 18/2024</u>
(B) Records, Promotion, Repetition and Progression				
3. Promotion of students	School	School	COA <u>[P]</u> <u>SAG</u>	S44, App 1 para 15 S3.3.2 para 1
4. Maximum rate of repetition	EDB	EDB	COA <u>[P]</u>	S46

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			COA[S] COA[A] <u>SAG</u>	S45 S15.4(a) S3.3.2 para 2
5. Pupils taking more than seven years to complete six-year primary course	EDB	EDB	COA[P] COA[A] <u>SAG</u>	S44 S15.4(b) S3.3.2 para 2e
(C) Discipline				
6. Suspension of students	School	School	COA[P] COA[S] COA[Sp] COA[A] <u>SAG</u> Cir	S45, App 1 para 14 S44, App 1 para 14 S49, App 1 para 14 S15.2(c) S3.6.4 para 5 <u>EDBC No. 21/2024</u>
7. Expulsion of students at senior secondary level with full justification acceptable to the Permanent Secretary for Education	School	School	<u>EO</u> COA[S] COA[A] <u>SAG</u> Cir	S74 S44, App 1 para 12 & 13 S15.2 S3.6.4 para 6 <u>EDBC No. 21/2024</u>
8. Expulsion of students aged under 15 years at or below junior secondary level	EDB	EDB	<u>EO</u> COA[P] COA[S] COA[Sp] COA[A]	S74 S45, App 1 para 12 & 13 S44, App 1 para 12 & 13 S49, App 1 para 12 & 13 S15.2

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			<u>SAG</u> Cir	S3.6.4 para 6 <u>EDBC No. 21/2024</u>
(III) Personnel Management Planning, School Self-evaluation and Budgeting				
(A) Planning and School Self-evaluation				
9. Uploading the endorsed Capacity Enhancement Grant Plan, School Development Plan, Annual School Plan and School Report to the school website	School	School	COA[A] <u>SAG</u> Cir WSite	S17.1 S5.3.4 <u>EDBC No. 23/2024 [Life-wide Learning Grant]</u> , <u>EDBC No. 17/2019 [Student Activities Support Grant]</u> , <u>EDBCM No. 156/2024 [Operating Expenses Block Grant, Expanded Operating Expenses Block Grant and Composite Furniture and Equipment Grant for Aided Schools for the 2024/25 School Year]</u> , <u>EDBCM No. 117/2024 [Diversity Learning Grant for Senior Secondary Students – Other Languages and Other Programmes (2024/25 school year)]</u> , <u>EDBCM No. 83/2021 [Provision of One-off Grant for Supporting the Implementation of the Senior Secondary Subject Citizenship and Social Development]</u> , https://www.edb.gov.hk/en/sch-admin/sch-quality-assurance/sse/sse.html http://www.edb.gov.hk/en/sch-admin/fin-management/subsidy-info/ref-capacity-enhancement-grant/index.html <a 488="" 507="" 894="" 914"="" data-label="Page-Footer" href="https://www.edb.gov.hk/en/curriculum-development/curriculum-</td></tr> </table> </div> <div data-bbox=">11

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
				area/life-wide-learning/lwl-grant/index.html https://www.edb.gov.hk/en/curriculum-development/major-level-of-edu/secondary/learning-teaching-resources/DLG.html https://www.edb.gov.hk/en/curriculum-development/curriculum-area/life-wide-learning/sas-grant/index.html
(IV) School Finance Matters^{Note}				
(A) School Revenue				
10. Class structure and expansion of school by operating additional classes	EDB	EDB	COA[P] COA[S] COA[Sp] COA[A] Cir	S12 S12 S1 S7.3 EDBCM No. 11/2024 (for primary schools), 41/2024 (for secondary schools)
11. Rent, Government Rent and Rates reimbursement actually paid for school purposes	EDB	EDB	COA[P] COA[S] COA[Sp] COA[A]	S38 S37 S43 S10.2(b)(ii)

- ^{Note} The following files on financial issues are also provided for schools' reference and use and can be downloaded from EDB's Website:
- Report on Financial and Personnel Matters Approved by SMC/IMC for Aided Schools
<https://www.edb.gov.hk/attachment/en/common/report%20on%20financial%20and%20personnel%20matters%20approved%20by%20smc%20imc%20for%20aided%20schools.doc>
 - Points to Note on Financial Management of Aided Schools
https://www.edb.gov.hk/attachment/en/sch-admin/regulations/checklist/Points%20to%20Note%20on%20Financial%20Management%20of%20Aided%20Schools_e.pdf
 - Exception Report on Procurement Activities for Aided Schools
<http://www.edb.gov.hk/attachment/en/common/exception%20report%20on%20procurement%20activities%20for%20aided%20schools.doc>

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			<u>SAG</u> Cir	S6.2.1 para 2d <u>EDBC No. 14/2007</u>
12. Transfer of Special Domain surpluses to Administration Grant/ Revised Administration Grant for meeting contractual obligation to the continued employment of janitor/ clerical staff	EDB	N.A.	WSite	<u>OEBG User Guide S.4.9</u>
13. Collection of subscription/ tong fai	EDB	EDB	<u>ER</u> COA[P][S] COA[Sp] COA[A] <u>SAG</u> Cir	R60A, R61 S14-16 S15-17 S14.3(c) S6.2.2 para 1a <u>EDBC No. 6/2008</u>
14. Collection of boarding fees	EDB	EDB	<u>ER</u> COA[Sp] COA[A]	R60A(2), R66 S12-14 S14.3(b)
15. Collection of fees and charges (other than boarding fee and subscription/ tong fai) exceeding the approved ceiling as stipulated by EDB for educational use	EDB	School	<u>ER</u> COA[P] COA[S] COA[Sp] COA[A] <u>SAG</u>	R61, R63, R66 S14(c) S14(d) S15(d) S14.3(d) S6.2.2 para 1b & 1c, App 3 & 4 of Chap 6

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			<u>SAG</u> <u>GFM</u> Cir	Page 13 & 14 S3.4, 6.2(iii) & 6.3(d) <u>EDBC No. 14/2012</u>
16. Fund-raising activities under the conditions specified by EDB	School	School	<u>ER</u> <u>SAG</u>	R66 S6.2.2 para 1d & 3, S6.5.2 para 3, App 5 of Chap 6
17. Acceptance of advantages and donations	School	School	COA[P][S] COA[Sp] COA[A] <u>SAG</u> Cir	S17 S18 S14.2(a) & 14.4 S6.2.2 para 1e S2.3.4 para 2a & 2b <u>EDBC No. 3/2022</u> <u>EDBCM No. 39 /2024 (para 5 & Annex 1 para 5.1)</u> <u>EDBCM No. 172/2015 (para 5)</u>
18. Acceptance of donation which may incur recurrent government expenditure	EDB	EDB	COA[P][S] COA[Sp] COA[A] <u>SAG</u> Cir	S17(a) (b) S18(a) (b) S14.4 S6.2.2 para 1e <u>EDBC No. 3 /2022</u>
19. Hire of accommodation	School	School	<u>SAG</u> Cir	S6.2.2 para 1f, S8.2.2, App 1 of Chap 8 <u>EDBC No. 5/2011</u>
(B) Trading Operations				
20. Conducting trading operations	EDB	School	<u>ER</u> COA[P][S][Sp]	R99A, R99B App 1 para 32-34

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			<u>SAG</u> <u>GFM</u> Cir	S6.2.2 para 3, S6.3, S6.5.2 para 4 S3.3, 6.2(ii) & 6.3(a) <u>EDBC No. 10/2016</u>
21. Acceptance of donations or advantages from trading operators/suppliers	School	School	<u>SAG</u> Cir	S6.3 para 3b & c S2.3.4 para 2a & 2b <u>EDBC No. 10/2016 (para 3, App 2 para 3 & App 5 para. g, h, l, m & n), 3/2022</u> <u>EDBCM No. 39 /2024 (para 5 & Annex 1 para 5.1)</u> <u>EDBCM No. 172/2015 (para 5)</u>
22. Sale of textbooks on school premises	School	School	Cir	<u>EDBC No. 10/2016 (Para 3 pt.c, App 3 para 3)</u> <u>EDBCM No. 39 /2024 (Annex 1 para 5.2)</u>
23. Delegation of trading operations to Parent-Teacher Association (PTA) or School Sponsoring Body (SSB)	School	School	<u>SAG</u> Cir	S6.3 para 3e <u>EDBC No. 10/2016 (App 2 para 3 & App 5 para a & j)</u>
(C) Procurement of Stores and Services				
24. Inviting, vetting and approving quotations/tenders	School	School	<u>SAG</u> Cir	S6.4.2 para 2b <u>EDBC No. 4/2013</u>
25. Appointment of different persons to handle the opening and vetting of written quotations/tenders as well as approval of tenders	School	School	<u>COA[A]</u> <u>SAG</u> Cir	S14.6 S6.4.2 para 2j & k <u>EDBC No. 4/2013</u>
26. Insufficient number of suppliers invited	School	School	<u>SAG</u> Cir	S6.4.2 para 2e <u>EDBC No. 4/2013</u>

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
27. Sub-contracting to third party by the supplier/contractor	School	School	Cir	<u>EDBC No. 4/2013</u>
(D) Internal Control				
28. Disposal of records of books of accounts of permanent nature	EDB	EDB	COA[P] COA[S] COA[Sp] <u>SAG</u>	S66(b) S66(b) S70(b) S6.8
(V) Personnel Matters				
(A) Appointment, Regrading, Promotion and Acting Appointment				
(i) Appointment and Allocation of Teaching Staff				
29. Appointment of teaching staff (excluding school head and certain types of staff as specified in Codes of Aid)	School	School	<u>EO</u> <u>ER</u> COA[P] COA[S] COA[Sp] COA[A] COA[Comp] <u>SAG</u>	S42, S44, S45, S46, S47, S48, S49, S50, S51, S52 R68, R69, R70, R76(1), R77, R78 S19, S49-S56, App 2A, App 2/Att A1-A2, App 3, App 4/Att C-I, App 5 para 4, App 8 S19, S48-S56, App 2, App 2/Att A, App 2/Att B, App 3, App 4, App 4/Att C-I, App 8, App 9 para 4-6 S20, S52-S60, App 2, App 2/Att B, App 2/Att C, App 3, App 4, App 4/ Att A-I [excluding Att A-C, F(ii) ,G(ii) and H(iii)], App 5 para 2, App 6, App 9 S13.1(c) & S13.2(a) S1 & S4 S7.1 para 1, 2 & 4, S7.2.1, S7.3, S7.4, App 3, 4 and 12 of Chap 7

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			GSA[P][S] Cir WSite	Relevant sections as applicable <u>EDBC No. 5/2005, 10/2015, 14/2023, 11/2019 (para 8), 6/2020</u> <u>EDBCM No. 142/2024</u> On Appointment Matters: http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/appointment/index.html On All-graduate teaching force policy: https://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/graduate-teacher-posts/index.html (for primary schools) https://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/graduate-teacher-posts-sec/index.html (for secondary school)
30. Appointment of school head/principal [Note: Schools should read this item in conjunction with item 47 of this checklist.]	EDB	EDB	<u>EO</u> COA[P] COA[S] COA[Sp] COA[A] COA[Comp] <u>SAG</u> GSA[P][S] Cir	S53, S54, S55, S56, S57, S57A S50(a)(i), App 2A(B)(a), App 2/Att A1-2, App 3, App 4/Att A-C S49(a)(i), App2, App3, App4/Att A-C, App 9 para 1(b) S53(a)(i), App 2/Att A, App 3, App 4/Att A-C, F(ii), G(ii), H(iii) S13.2(a) S1 & S4 S7.1 para 3e & 4, S7.2.1 para 3, S7.3.2, S7.4, App 1 and 12 of Chap 7 Relevant sections as applicable <u>EDBC No. 31/2002, 5/2005, 6/2016, 6/2020, 14/2023, 1/2024, 2/2024, 3/2024</u>

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			WSite	http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/appointment/index.html
31. Direct appointment of teachers and other staff to promotion ranks [Note: For aided primary schools under a sponsoring body with more than one aided primary school, confirmation with EDB on the available promotion teaching vacancies is required.]	EDB	School	COA[P] COA[S] COA[Sp] COA[A] <u>SAG</u> <u>^sSAG</u> GSA[P][S] Cir WSite	S50(a)(ii), S60, App 5I(1) S49(a)(ii), S59, App 9 para 1(b) S53(a)(ii), S64, App 5A1(b) S13.3(e) S7.1 para 3e App D Relevant sections as applicable <u>EDBC No. 30/2000 (para 2 & 6), 11/2019 (para 15), 14/2023, 11/2024</u> http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/appointment/index.html
32. Appointment of substitute teachers (daily-rated supply and monthly-paid temporary teachers) (excluding temporary Native-speaking English Teachers (NETs))	School	School	COA[P] COA[S] COA[Sp] COA[A] COA[Comp] <u>SAG</u> GSA[P][S] Cir	S31-32 S32-33 S35-36 S13.11 S7B para1, 2 & 4-6, S12 S7.2.1 para 4, S7.4, App3, 4 and 12 of Chap 7 (Relevant paras as appropriate) Relevant sections as applicable <u>EDBC No. 60/1999, 14/2023</u> <u>EDBCM No. 150/2024</u>

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			WSite	Supply Teacher: https://www.edb.gov.hk/en/teacher/appointments-related/supply-teachers/index.html Teacher Relief Grant (TRG) for Schools with an Incorporated Management Committee: https://www.edb.gov.hk/en/sch-admin/fin-management/subsidy-info/trg/index.html
33. Appointment and re-appointment of Native-speaking English Teachers (NETs) under the Enhanced NET Scheme in Secondary Schools and the NET Scheme in Primary Schools	School	School	Cir WSite	EDBC No. 7/2013 (for primary schools), 8/2013 (for secondary schools), 14/2023 EDBCM No. 63/2024 (for primary schools), 64/2024 (for secondary schools) http://www.edb.gov.hk/en/curriculum-development/resource-support/net/index.html
34. Appointment of temporary Native-speaking English Teachers (NETs)	EDB	EDB	COA[P] COA[S] COA[Sp] COA[A] SAG GSA[P][S] Cir WSite	S50(a) S49(a) S53(a)(vi) S13.2(a) S7.1 para 3e Relevant sections as applicable EDBC No. 14/2023 http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/net-scheme/net-appointment-matters.html/data/sch-admin/admin/about-sch-staff/net-scheme/net-appointment-

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
				matters.html Appointment of Temporary NET (Primary Schools) (Secondary Schools)
35. Appointment of English and Putonghua teachers (in relation to the Language Proficiency Requirement for teachers of English/ Putonghua)	School	School	<u>SAG</u> Cir WSite	S7.4.2 para 5b EDBC No. 14/2023 EDBCM No. 74/2024, No. 142/2024 (to be updated annually) http://www.edb.gov.hk/lpr
36. Appointment of English and Chinese teachers (in relation to the Recommendations of SCOLAR on Language Teacher Education and Qualifications)	School	School	<u>SAG</u> Cir WSite	S7.4.2 para 5c EDBC No. 14/2023 EDBCM No. 54/2004, 106/2009 http://www.edb.gov.hk/sr
37. Optimising the Use of Teaching Manpower Resources	School	School	Cir	EDBC No. 10/2017
38. Deployment of redundant teachers/ over-ranked school heads/ redundant senior teachers/ excess graduate teachers	School	School	<u>EO</u> <u>COA[A]</u> <u>^sSAG</u> Cir	S40AG S13.6 App E EDBCM No. 37/2024 (for primary schools), 38/2024 (for secondary and special schools)
(ii) Regrading				
39. Regrading to graduate teaching posts	School	School	COA[P] COA[S] COA[Sp]	S60 S59 S64

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			COA[A] <u>SAG</u> Cir WSite	S13.3(a)-(d) S7.2.2, App 6 of Chap 7 <u>EDBC No. 11/2019 (para 9-12)</u> https://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/graduate-teacher-posts/index.html (for primary schools) http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/graduate-teacher-posts-sec/index.html (for secondary school)
(iii) Appointment of Non-teaching Staff				
40. Appointment of Educational Psychologists	School	School	COA[P] COA[S] COA[Sp] COA[A] COA[Comp] <u>SAG</u> GSA[P][S] Cir WSite	S19, S49-53, App 2A, App 3, App 4/Att J and K S19, S48-52, App 2, App 3, App 4/Att J and K S20, S52-56, S59-62, App 2 para 7, App 3, App 4/Att J(i) & J(ii) S13.2 S4.22-4.23 S7.2.3 para 9, S7.4.2 Para 4, App 2 of Chap 7 Relevant sections as applicable <u>EDBC No. 5/2005, 10/2015, 14/2023</u> http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/appointment/index.html

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
41. Employment of temporary replacements of Educational Psychologists	School	School	COA[P] COA[S] COA[Sp] COA[A] Cir	S32(c) S33(c) S37(a) S13.11(b) <u>EDBC No. 14/2023</u>
42. Appointment of Assistant Social Work Officers	School	School	COA[P] COA[Sp] COA[A] COA[Comp] <u>SAG</u> GSA[P] Cir WSite	S19, S49-53, 58, App 2A, App 4/ Att M, App9 S20, S52-56, S59-62, App 2(para 3), App 3, App 4 C1 S13.2 S4.25 & S4.30 S7.4.2 Para 4 & 5(e), App 2 of Chap7 Relevant sections as applicable <u>EDBC No. 5/2005, 10/2015, 36/2018, 14/2023</u> http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/appointment/index.html
43. Employment of temporary replacement of Assistant Social Work Officers	School	School	COA[P] COA[A] COA[Sp] Cir	S32(c) S13.11(b) S37(a) <u>EDBC No. 14/2023</u>
44. Direct appointment of Laboratory Technician II	School	School	COA[S] COA[Sp] COA[Comp] GSA[S]	App 5 para 6 App 6 para 7 S4.21 Relevant sections as applicable

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			Cir	<u>EDBC No. 12/2016, 14/2023</u> <u>EDBCM No. 38/2024</u>
45. Appointment of School Executive Officers	School	School	COA[P] COA[S] COA[Sp] COA[A] COA[Comp] SAG GSA[P][S] Cir WSite	S19, S49-50, S52-53, 58, App 2A, App 3, App 4/ Att N S19, S48-49, S51-52, S55-56, App 2, App 3, App 4/Att M S20, S52-53, S55-56, S59-60, App 2, App 3, App 4/Att L S10.1 (f) S4.26 S7.1 para 1, 2 & 5, S7.2.3 para 1 & 2, S7.4.2 para 4 Relevant sections as applicable <u>EDBC No. 5/2005, 10/2015, 14/2023</u> <u>EDBCM No. 37/2019, 11/2024, 41/2024</u> <u>https://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/schexo/index.html</u>
46. Appointment of clerical and janitor staff	School	School	COA[P] COA[S] COA[Sp] COA[A] COA[Comp] SAG GSA[P] Cir WSite	S20, S33, App 2B & App 4/ Att O S34, App 14/Att A S21, App 2, App 4 S13.10 S9 & 10 S7.1 para 1&2, S7.2.3 Relevant sections as applicable <u>EDBC No. 5/2005, 10/2015, 14/2023</u> <u>http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/appointment/index.html</u>

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
(iv) Promotion and Acting Appointment				
47. Promotion to school head [Note: Schools should read this item in conjunction with item 30 of this checklist.]	EDB	EDB	COA[P] COA[S] COA[Sp] COA[Comp] SAG Cir	S60(a), App 4/Att A-C, D1&H1 S59(a), App 4 / Att A – D S64(a), App 4/ Att A, B, C, D, F(ii) G(ii), H(ii) & H(iii) S13.3(a) [A] S4.1-4.3, S4.6-4.8 S7.2.4, S7.3.1, S7.3.2 EDBC No. 30/2000, 31/2002, 1/2024, 2/2024, 3/2024, 6/2016
48. Promotion to senior teaching posts other than school head	School	School	COA[P] COA[S] COA[Sp] COA[A] COA[Comp] SAG Cir WSite	S60-61, App 4/Att C-D2, App 5 S59-60, App 4/Att C-D, App 4/Att F-H, App 9 S64-65, App 4/ Att C, D, F (i), G(i), H (i), H(ii), H(iii) & App 5A S13.3(a)-(d) S5 S7.2.4 para 1, 3 & 4, S7.3.1, S7.3.2, App 5 of Chap 7 EDBC No. 30/2000, 11/2019 (para 14), 6/2020 (para 15-17 & Annex 4), 11/2024 http://www.edb.gov.hk/en/teacher/qualification-training-development/development/training-requirements-teacher-promotion-in-aided-sch.html
49. Promotion of Educational Psychologists	School	School	COA[P] COA[S] COA[Sp] COA[Comp] SAG	S61, App 4/Att K, App 5 S60, App 4/Att K, App 9 S65, App 4/Att J (ii), App 5A1(a) , App 5A3(h) S4.23, S5 S7.2

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			GSA[P][S] Cir	Relevant sections as applicable <u>EDBC No. 30/2000</u>
50. Promotion of Laboratory Technicians	School	School	COA[S] COA[Sp] COA[Comp] SAG GSA[S] Cir	App 2/Att C para 4(a), App 9 para 1, 9 & 10 App 4B, App 5A1, App 5A3(i) & (j) S4.21,S5 S7.2.4 para 1, App 5 of Chap 7 Relevant sections as applicable <u>EDBC No. 12/2016</u> <u>EDBCM No. 38/2024</u>
51. Training requirements for promotion	EDB	School	COA[P] COA[S] COA[Sp] COA[Comp] SAG Cir WSite	App 5 para I(3) App 9 para 3 App 5A 1(c) (d) S5 para 2, S5/Att A S7.2.4 para 1 & 4, App 5 of Chap 7 <u>EDBC No. 6/2020 (para 15-17, & Annex 4)</u> <u>http://www.edb.gov.hk/en/teacher/qualification-training-development/development/training-requirements-teacher-promotion-in-aided-sch.html</u>
52. Acting appointment to fill vacant posts for substantive appointment	School	School	COA[P] COA[S] COA[Sp] COA[Comp] SAG	S62, App 3C, App 5 para I(1)&(3) S62, App 3 para 2, App 9 para 1(b), 3 & 11 S66, App 3IID, App 5A1(b), App 5B S5 para 1(b) & 2, S8B S7.2.4, App 5 of Chap 7

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			Cir	<u>EDBC No. 30/2000, 8/2004</u>
53. Acting appointment for administrative convenience to approved functional posts which are left vacant for not less than 30 consecutive calendar days (excluding the school head post)	School	School	COA[P] COA[S] COA[Sp] COA[A] COA[Comp] <u>SAG</u> Cir	S62, App 3(C) S62, App 3 para 2 S66(b), App 3IID S13.4 S8B S7.2.4, App 5 of Chap 7 <u>EDBC No. 30/2000, 8/2004, 11/2019 para 14</u>
(B) Administrative Procedure for the Appointment of School Staff				
54. Assessing salaries for teaching and non-teaching staff according to the salary scales as laid down in the Codes of Aid	School	School	<u>ER</u> COA[P] COA[S] COA[Sp] COA[A] COA[Comp] <u>SAG</u> GSA[P][S] Cir	R78 [Applicable to teaching staff only] S22, S50(b), App 3(A) S21, S49(b), App 3 para 1 S23, S53(b), App 3I S10.1(a), S13.1(g), S13.2(b) S2 S7.2.1 para 2g, S7.2.3 para 1 App 6A-App 6D (for secondary schools) App 6A-App 6E (for primary schools) (Other relevant sections as applicable) <u>EDBC No. 5/2005 (para 2), 8/2010</u>
55. Approving responsibility / acting allowance, and special education allowance for teachers	School	School	COA[P] COA[S] COA[Sp]	S22, App 3(C)-(D), App 4/Att A S21, App 3 para 2, App 3/Att A S23, App 3 II

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			COA[A] COA[Comp] Cir	S10.1(a) S8 <u>EDBC No. 8/2004, 12/2007</u>
56. Rectification of overpayment or underpayment of salaries to teachers	School	School	COA[P][S] COA[Sp] COA[A] Cir	S19(b) S20(b) S13.2(b) & (c) <u>EDBC No. 5/2005 (para 11), 8/2010</u>
57. Handling Long Service Payment/ Severance Payment for school staff	School	School	COA[Comp] SAG Cir	S11 para 3&4 S7.5.5 <u>EDBCM No. 156/2024 (para 3)</u>
58. Permission on taking teaching experience earned outside Hong Kong for incremental credit on appointment	EDB	EDB	COA[P] COA[S] COA[Sp] COA[A] GSA[P][S]	S25 S24 S26 S10.1(d) App 3, Part A, para 5
59. Permission on retention of existing salary for stepped-down teaching staff	EDB	EDB	COA[A] Cir	S13.7(c) <u>EDBCM No. 37/2024</u> (for primary schools), <u>38/2024</u> (for secondary and special schools)
60. Payment of Salary for August (for teachers with less than one academic year of service)	EDB	EDB	COA[P] COA[S] COA[Sp] COA[Comp]	App 9 para 1(d) App 8 para 1(d) App 9 para 1(d) S3 para (B)1(d)

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
(C) Rights and Benefits of School Employees				
(i) Staff Safety and Staff Injured on Duty				
61. Staff injured on duty	School	School	<u>SAG</u>	S7.5.2 para 2
(ii) Leave Matters (Teaching staff and School Heads)				
62. Submission of leave record of teaching staff annually for endorsement	EDB	EDB	COA[P] COA[S] COA[Sp] COA[A] <u>SAG</u> <u>^sSAG</u> Cir	S35(a) S31(a) S34(a) S13.9(e) S7.5.3 para 2 App H <u>EDBC No. 1/2006</u>
63. Paid or no-pay sick leave, maternity leave, special tuberculosis leave, paid study leave endorsed by EDB in advance and paid paternity leave	School	School	COA[P] COA[S] COA[Sp] COA[A]	S26-30 & 35, App 9 & 10 S25-29 & 31, App 11 & 12 S28-32 & 34, App 10 & 11 S13.9
64. Paid special leave (maximum 2 days per school year)	School	School	COA[Comp] <u>SAG</u>	S7A S7.5.3, App 7, 9 & 10 of Chap 7
65. Paid leave for serving as jurors or witnesses	School	School	<u>^sSAG</u> Cir	App H <u>EDBC No. 1/2006, 16/2015, 16/2018</u>
66. Paid leave for special events as specified (maximum 14 days per school year)	School	School		

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
67. No-pay leave (excluding no-pay sick/ maternity/ special tuberculosis leave)	EDB	School [Note: Schools under IMC should notify EDB of the no-pay leave granted and seek EDB's approval for keeping the relevant teacher's Grant/ Subsidized Schools Provident Fund account open and adjustment of salary incremental date (if necessary).]		
68. Paid study leave which has not been endorsed by EDB in advance	EDB	EDB		
69. Other types of leaves which are not specified above	EDB	EDB		

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
(iii) Leave Matters (Laboratory Technicians, Specialist Staff and School Executive Officers)				
70. Paid annual leave	School	School	COA[P]	S26-28, S34 & 35, App 9-11D
71. Paid or no-pay sick leave, maternity leave, special tuberculosis leave, paid study leave endorsed by EDB in advance and paid paternity leave	School	School	COA[S] COA[Sp] COA[A] COA[Comp]	S25-27, S30-31, App 11-13D S28-S30, S33 & S34, App 10-12 S13.9 S7A
72. Paid leave for serving as jurors or witnesses	School	School	SAG sSAG	S7.5.3, App 7, 9 & 10 of Chap 7 App H
73. Paid study leave which has not been endorsed by EDB in advance	EDB	EDB	Cir	EDBC No. 1/2006, 16/2015, 16/2018
(iv) Leave Matters (Other Non-teaching Staff)				
74. Various types of leave in accordance with the Employment Ordinance, Codes of Aid and guidelines issued by the EDB from time to time	School	School	COA[P] COA[Sp] COA[A] COA[Comp] SAG sSAG Cir	S34, App 11E-12 S33, App 10, App 11 & App 12 S13.9 S7A S7.5.3 para 3b, App 7, 9 & 10 of Chap 7 App H EDBC No. 1/2006, 16/2015, 16/2018
75. Annual leave for other non-teaching staff in special schools such as house-parents, nurses, cooks and the like if their leave cannot be staggered	School	School	COA[Sp] COA[Comp] SAG sSAG	S33, S39(b), App 12 S7A para 3 S7.5.3 para 3b, App 8-9 of Chap 7 App H

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
(v) Provident Fund Scheme				
76. Keeping teachers’ Provident Fund Account open	EDB	EDB	<u>GSPFR</u> <u>SSPFR</u> <u>SAG</u> WSite Cir	S13(3) S13(3) App H para 6 (i) <u>Provident Fund</u> (ii) <u>Form EDB72</u> <u>EDBC No. 1/2006 (Annex : para 5(b) & 6)</u>
(D) Staff Conduct and Discipline				
77. Teaching staff taking up paid or no-pay outside duties	School	School	COA[P] COA[S] COA[Sp] COA[A] <u>SAG</u>	S63 S63 S67 S13.13 S7.4.4 para 3f, S7.4.4 para 4c, S7.8.2 para 3, App 7 para 7 of Chap 7
78. Suspension of teachers from normal duties	School	School	COA[P] COA[S] COA[Sp] COA[A] <u>SAG</u>	S57(f) S57(f) S61(f) S13.5(d) S7.8.3
79. Termination of service / Non-renewal of contracts	School	School	<u>ER</u> COA[P] COA[S] COA[Sp]	R76(2) S57(a)-(e), App 6-8 S57(a)-(e), App 6-8 S61(a)-(e), App 7-9

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			COA[A] COA[Comp] SAG	S13.5(a)-(b) S6 S7.2.1 para 2j, S7.5.1, S7.8.3, S7.10 para 1-2
80. Summary dismissal	School	School	ER COA[P] COA[S] COA[Sp] COA[A] COA[Comp] SAG	R76(2) S57(g), App 6-7 S57(g), App 6-7 S61(g), App 7-8 S13.5(c) S6 S7.2.1 para 2j, S7.5.1, S7.8.3, S7.10 para 2
81. Withholding salary increment due to unsatisfactory performance	EDB	School	COA[P] COA[S] COA[Sp] COA[A] SAG ^s SAG	S24(b) S23(b) S25(b) S10.1(b) S7.8.3 App A
82. Staff required to step down to a lower rank for reasons other than reduction of classes	EDB	School	COA[A] ^s SAG	S13.7 App F
(E) Staff Resignation, Retirement and Extension of Services				
83. Staff tendering resignation or due for retirement	School	School	COA[P] COA[S] COA[Sp]	S57(a)-(d), S58, S59 S57(a)-(d)&(h), S58 S61(a)-(d), S63

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			COA[A] COA[Comp] SAG	S13.1(c), 13.5(a), (f) & (g) S3 para(B)1, S6 S7.10 para 1 & 2
84. Waiver of salary payment in lieu of notice upon resignation of teaching staff	School	School	COA[P] COA[S] COA[Sp] COA[A] COA[Comp] SAG	S57(e) S57(e) S61(e) S13.5(e) S6 para 1 S7.10 para 1a & 2
85. Extension of service of principals, teachers, Educational Psychologists, Assistant Social Work Officers, Laboratory Technicians and School Executive Officers after the end of the school year in which they reach the age of sixty	EDB	EDB	EO COA[P] COA[S] COA[Sp] COA[A] SAG Cir	S58A, S58B S59 S58 S63 S13.2(a), S13.8 S7.10 EDBCM No. 236/2024 (to be updated annually)
(VI) School Premises and Safety Management				
(A) Use of School Premises				
86. Use of school premises other than approved activities of the school	EDB	EDB	COA[P] COA[S] COA[Sp] COA[A]	S48(a) S47(a) S51(a) S16.1

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			<u>SAG</u>	S8.2.1 para 1
(B) Maintenance of School Premises				
87. Capital subvention for major repairs/emergency repairs	EDB	EDB	<u>COA[P]</u> <u>COA[S]</u> <u>COA[Sp]</u> <u>COA[A]</u> <u>COA[Comp]</u> <u>SAG</u> Cir WSite	S39(a), App 17 S39(a), App 17 S44(a), App 17 S11.1, S16.2 S13B S6.2.1 para 3c, S8.5.1 para. 3, S8.5.2, S8.5.3 <u>EDBC No. 14/2024</u> <u>School Maintenance Automated Rapport Terminal (SMART) system (via the Education Bureau's Common Log-On System (CLO))</u> <u>Procedure for Major Repairs (Non-Estate Aided Schools)</u> <u>Procedure for Major Repairs (Estate Aided Schools)</u> <u>Guidance Notes for Submission of Emergency Repairs (ER)</u> <u>Requests by Aided Schools</u>
(C) Alterations to School Premises				
88. Change of room use without structural alteration	School	School	<u>COA[A]</u> <u>SAG</u>	S16.3 S8.6.2, App 6 & 7 of Chap 8
89. Conversion work with structural alteration	EDB	EDB	<u>EO</u> <u>ER</u> <u>SAG</u>	S19, S20 R10 S8.6.1

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			Cir	<u>EDBC No. 3/2002</u>

Abbreviations and Hyperlinks:

IMC	refers to Incorporated Management Committee	
SMC	refers to School Management Committee	
EO	refers to Education Ordinance (CAP 279)	https://www.elegislation.gov.hk/hk/cap279
ER	refers to Education Regulations (CAP 279A)	https://www.elegislation.gov.hk/hk/cap279A
GSPFR	refers to Grant Schools Provident Fund Rules (CAP 279C)	https://www.elegislation.gov.hk/hk/cap279C
SSPFR	refers to Subsidized Schools Provident Fund Rules (CAP 279D)	https://www.elegislation.gov.hk/hk/cap279D
COA	refers to Code of Aid	
[P]	refers to Code of Aid for Primary Schools	https://www.edb.gov.hk/attachment/en/sch-admin/regulations/codes-of-aid/coa_pri_e.pdf
[S]	refers to Code of Aid for Secondary Schools	https://www.edb.gov.hk/attachment/en/sch-admin/regulations/codes-of-aid/coa_sec_e.pdf
[Sp]	refers to Code of Aid for Special Schools	https://www.edb.gov.hk/attachment/en/sch-admin/regulations/codes-of-aid/coa_ss_e.pdf
[A]	refers to Code of Aid for Aided Schools	https://www.edb.gov.hk/attachment/en/sch-admin/regulations/codes-of-aid/code-of-aid-and-related-documents-for-aided-imc-schools/coa_english_1.19.pdf
[Comp]	refers to Compendium to Code of Aid for Aided Schools	https://www.edb.gov.hk/attachment/en/sch-admin/regulations/codes-of-aid/code-of-aid-and-related-documents-for-aided-imc-schools/Compendium_1.19.pdf
SAG	refers to School Administration Guide	https://www.edb.gov.hk/attachment/en/sch-admin/regulations/sch-admin-guide/SAG_E.pdf
^s SAG	refers to Supplement to SAG for Aided Schools Operated by IMC	https://www.edb.gov.hk/attachment/en/sch-admin/regulations/codes-of-aid/code-of-aid-and-related-documents-for-aided-imc-schools/Supplement%20to%20SAG%202024.pdf
Cir	refers to EDB Circular/Circular Memorandum	http://applications.edb.gov.hk/circular/circular.aspx?langno=1
GSA	refers to Guide to Salary Assessment	http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/salary-assessment/guides.html

GFM	refers to Guide to Financial Management for Aided Schools Operated by Incorporated Management Committees	https://www.edb.gov.hk/attachment/en/sch-admin/sbm/corner-imc-sch/fm%20guide%20english.pdf
WSite	refers to EDB Website	http://www.edb.gov.hk/
App	refers to Appendix	
Att	refers to Attachment	
Chap	refers to Chapter	
para	refers to paragraph	
R	refers to Regulation	
S	refers to Section	

Education Bureau
March 2025 (updated)