



# iManager User Guide (eMPF Setup)

Version 3.0



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## Table of Contents

<b>Topic 2 Advanced Settings of iMGR</b>	<b>4</b>
2.12 eMPF Setup	4
<b>Appendix 2 Additional Resources</b>	<b>10</b>

## Topic 2 Advanced Settings of iMGR

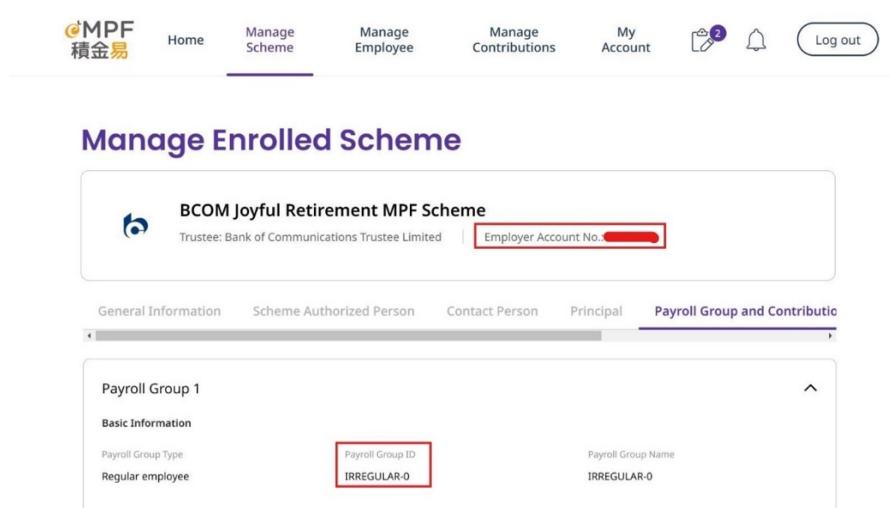
### 2.12 eMPF Setup

In this section, you can configure the eMPF platform settings. Here, you can also output the employees' information and their MPF plan details.

2.12.1

#### Pre-Setup Requirements

Before starting the eMPF setup, please complete the application for an eMPF account and obtain the employee's employer's MPF account number and payroll group ID from the eMPF platform to proceed with the subsequent steps.



The screenshot shows the iMGR interface for managing enrolled schemes. The top navigation bar includes links for Home, Manage Scheme, Manage Employee, Manage Contributions, My Account, and Log out. The 'Manage Scheme' tab is currently selected. Below the navigation is a section for the 'BCOM Joyful Retirement MPF Scheme', showing the trustee as 'Bank of Communications Trustee Limited'. A red box highlights the 'Employer Account No.' field. The main content area is titled 'Manage Enrolled Scheme' and shows a list of payroll groups. The first group, 'Payroll Group 1', is expanded, showing 'Basic Information' with 'Payroll Group Type' set to 'Regular employee' and 'Payroll Group ID' set to 'IRREGULAR-0'. The 'Payroll Group Name' is listed as 'IRREGULAR-0'.

After obtaining the necessary information, the employer must set up the details in iMGR.

2.12.2

#### Setup for "eMPF Termination Code" and "Tax Cessation Reason"

- Click "Code Setup" → "Miscellaneous Code Setup".



The screenshot shows the 'Code Setup' menu in iMGR. The menu items are: Company Setup, Company Bank Account Setup, Hierarchy Level Setup, Business Hierarchy Setup, Payment Code Setup, Year End Bonus Plan Setup, **Miscellaneous Code Setup** (which is highlighted with a red box), Statutory Holiday Setup, Public Holiday Setup, and Work Hour Pattern Setup.

- ii) Click on "**Cessation Reasons**" from the menu on the left.

## Miscellaneous Code Setup

Employment Type
<b>Cessation Reason</b>
Position
Qualification
Skill
Skill Level
Rank
Staff Type
Permit Type
Document Type
Place Of Birth
Country of Issue
Nationality
CL Claim Reasons

iii) Click “**Edit**” to modify the Cessation Reasons Code.

## Miscellaneous Code Setup

Employment Type	Cessation Reason						
Cessation Reason	Delete						
Position		Code	Description	Tax Cessation Reason	Severance Pay	Long Service Pay	YEB Prorata
Skill Level		Add	<input type="text"/>	<input type="text"/>	Not Selected	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Rank			eMPF Termination Code:	Not Selected			
Staff Type	<input type="checkbox"/>	Edit	DN	Death	No	Yes	No
Permit Type			eMPF Termination Code:				
Document Type	<input type="checkbox"/>	Edit	DS	Summary dismissal	No	No	No
Place Of Birth			eMPF Termination Code:				
Country of Issue	<input type="checkbox"/>	Edit	ER	Early retirement	No	No	No
Nationality			eMPF Termination Code:				
CL Claim Reasons							

iv) Select the appropriate “**eMPF Termination Code**” and “**Tax Cessation Reason**” for each cessation reason.

**Note:** It is essential to set up "eMPF Termination Codes" and "Tax Termination Reasons" for all reasons for departure

## Miscellaneous Code Setup

Employment Type	Cessation Reason			
Cessation Reason				
Position				
Qualification				
Skill				
Skill Level				
Rank				
Staff Type				
Permit Type				
Document Type				
Place of Birth				
Country of issue				
Nationality				
CL Claim Reasons				
	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> <input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; padding: 0; margin: 0;" type="button" value="Delete"/> </div> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> <input type="checkbox"/> </div> <div style="flex: 1;"> <input type="text" value="Code"/> </div> <div style="flex: 1;"> <input type="text" value="Description"/> </div> <div style="flex: 1;"> <input type="text" value="Tax Cessation Reason"/> </div> <div style="flex: 1;"> <input type="text" value="Severance Pay"/> </div> <div style="flex: 1;"> <input type="text" value="Long Service Pay"/> </div> <div style="flex: 1;"> <input type="text" value="YEB Prorata"/> </div> </div>			
	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> <input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; padding: 0; margin: 0;" type="button" value="Add"/> </div> <div style="flex: 1;"> <input type="text"/> </div> <div style="flex: 1;"> <input type="text" value="Not Selected"/> </div> <div style="flex: 1;"> <input type="checkbox"/> </div> </div>			
	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> <input type="checkbox"/> </div> <div style="flex: 1;"> <input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; padding: 0; margin: 0;" type="button" value="Save"/> </div> <div style="flex: 1;"> <input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; padding: 0; margin: 0;" type="button" value="Cancel"/> </div> <div style="flex: 1;"> <input type="text" value="DN"/> </div> <div style="flex: 1;"> <input type="text" value="Death"/> </div> <div style="flex: 1;"> <input type="text" value="4 - Death"/> </div> <div style="flex: 1;"> <input type="checkbox"/> </div> </div>			
	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> <input type="checkbox"/> </div> <div style="flex: 1;"> <input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; padding: 0; margin: 0;" type="button" value="Edit"/> </div> <div style="flex: 1;"> <input type="text" value="DS"/> </div> <div style="flex: 1;"> <input type="text" value="Summary dismissal"/> </div> <div style="flex: 1;"> <input type="checkbox"/> </div> <div style="flex: 1;"> <input type="checkbox"/> </div> <div style="flex: 1;"> <input type="checkbox"/> </div> </div>			
	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> <input type="checkbox"/> </div> <div style="flex: 1;"> <input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; padding: 0; margin: 0;" type="button" value="Edit"/> </div> <div style="flex: 1;"> <input type="text" value="eMPF Termination Code: DEATH - Death"/> </div> <div style="flex: 1;"> <input type="text" value="DEATH - Death"/> </div> <div style="flex: 1;"> <input type="checkbox"/> </div> <div style="flex: 1;"> <input type="checkbox"/> </div> <div style="flex: 1;"> <input type="checkbox"/> </div> </div>			
	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> <input type="checkbox"/> </div> <div style="flex: 1;"> <input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; padding: 0; margin: 0;" type="button" value="Edit"/> </div> <div style="flex: 1;"> <input type="text" value="ER"/> </div> <div style="flex: 1;"> <input type="text" value="Early retirement"/> </div> <div style="flex: 1;"> <input type="checkbox"/> </div> <div style="flex: 1;"> <input type="checkbox"/> </div> <div style="flex: 1;"> <input type="checkbox"/> </div> </div>			
	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> <input type="checkbox"/> </div> <div style="flex: 1;"> <input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; padding: 0; margin: 0;" type="button" value="Edit"/> </div> <div style="flex: 1;"> <input type="text" value="eMPF Termination Code:"/> </div> <div style="flex: 1;"> <input type="text" value="eMPF Termination Code:"/> </div> <div style="flex: 1;"> <input type="checkbox"/> </div> <div style="flex: 1;"> <input type="checkbox"/> </div> <div style="flex: 1;"> <input type="checkbox"/> </div> </div>			

v) Click “**Save**” to save all inputted information.

#### Miscellaneous Code Setup

Employment Type	Cessation Reason		
Cessation Reason	Code	Description	Tax Cessation Reason
Position		Not Selected	Pay
Qualification			Long Service Pay
Skill			YEB Pay
Skill Level			Prorata
Rank			
Staff Type			
Permit Type			
Document Type			
Place Of Birth			
Country of Issue			
Nationality			
CL Claim Reasons			

**Add**

eMPF Termination Code: Not Selected

eMPF Termination Code: DEATH - Death

eMPF Termination Code: DEATH - Death

eMPF Termination Code: Summary dismissal

eMPF Termination Code: Early retirement

#### 2.12.3 Setup for "Grade Code or Rank (For eMPF)" and "Payroll Group ID"

i) Click “**MPF Setup**” → “**MPF Plan Setup**”.

MPF Setup Attendance Ta

**MPF Plan Setup**

- AVC Plan Setup
- P-Fund Plan Setup
- Casual Plan Setup
- MPF Enrolment Form (Employer Review)
- Generate HSBC MPF Enrollment Form

ii) Select the corresponding MPF scheme from the “**MPF Plan List**”.

**MPF Plan Setup**

**MPF Plan Search**

Code:	<input type="text"/>	Description:	<input type="text"/>
Scheme No:	<input type="text"/>	Scheme Name:	<input type="text"/>
Name of Employer:	<input type="text"/>		
<input type="button" value="Search"/> <input type="button" value="Reset"/>			

**MPF Plan List**

<input type="button" value="New"/>	<input type="button" value="Delete"/>	Code	Description	Scheme No	Scheme Name
		<input type="checkbox"/> HASE	HASE	MT00253	Hang Seng Mandatory Provident Fund - SuperTrust Plus
		<input type="checkbox"/> HASE2	HASE2	MT00253	Hang Seng Mandatory Provident Fund - SuperTrust Plus

iii) Click “**Edit**” to modify the data.

## MPF Plan Setup

View MPF Plan : HASE

<a href="#">- Back -</a> <a href="#">Edit</a> <a href="#">Delete</a>			
Plan Code :	HASE	Description :	HASE
Scheme No. :	MT00253 - Hang Seng Mandatory Provident Fund - SuperTrust Plus		
Name of Employer :	HASE	Employer Participation No. :	
Contact Name :		Contact No. :	
Address :			
Rounding Rule for Employer Contribution :	Round to 2 decimal place(s)	Rounding Rule for Employee Contribution :	Round to 2 decimal place(s)
<b>eMPF Options</b>			
Employer Account Number:		Grade Code or Rank(For eMPF):	
Payroll Group ID:		Department Code:	
<b>HSBC/HASE MPF</b>			
Pay Center ID:	MLY	Default Class ID:	CLASS001
Employer ID:	12345678		

iv) Enter the **“Employer Account Number”** and **“Payroll Group ID”** that were obtained from eMPF (refer to step 2.12.1).

### 強積金計劃設定

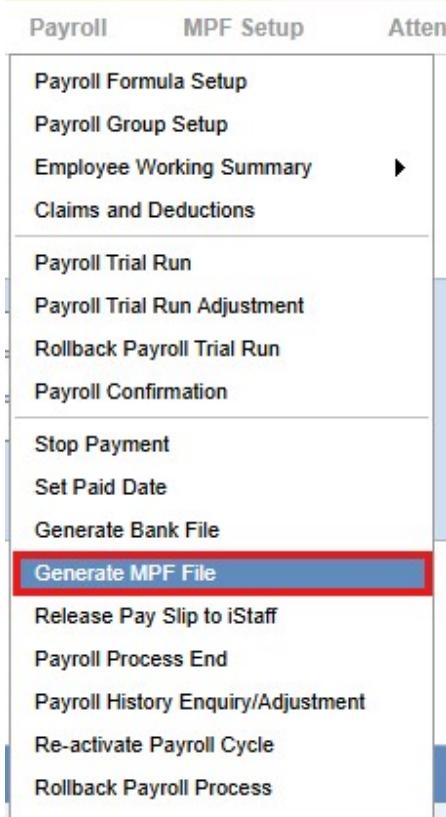
編輯 強積金計劃 : HASE

<a href="#">返回</a> <a href="#">儲存</a> <a href="#">刪除</a>			
計劃代號:	HASE	描述:	HASE
計劃號碼:	全部	MT00253 - Hang Seng Mandatory Provident Fund - SuperTrust Plus	
僱主名稱:	HASE	僱主參與編號:	
聯絡人名稱:		聯絡號碼:	
地址:			
僱主供款進位規則:	進位至	2	小數位
僱員供款進位規則:	進位至	2	小數位
<b>eMPF Options</b>			
Employer Account Number:		Grade Code or Rank(For eMPF):	
Payroll Group ID:		Department Code:	
<b>HSBC/HASE MPF</b>			
Pay Center ID:	MLY	預設級別號碼:	CLASS001
僱主編號:	12345678		

v) Click **“Save”** to save all inputted information.

## 2.12.4 Generate eMPF File

- i) Click "**Payroll**" → "**Generate MPF file**".



- ii) Choose the MPF Plan and Payroll Period, then check (✓) "**Generate eMPF File**" under eMPF File Detail.

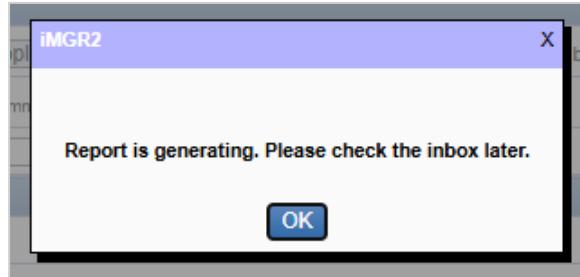
**Note:** If using Manulife's MPF scheme, check (✓) the "**Display Basic Salary**" option.

### Generate MPF File

#### MPF Detail:

MPF Plan:	HASE - HASE
Payroll Period:	2024-11-01 (yyyy-mm-dd) - 2024-11-30 (yyyy-mm-dd)
HSBC/Hang Seng Bank MPF File Detail	
File Format:	e-channel Format
eMPF File Detail	
Generate eMPF File:	<input checked="" type="checkbox"/>
Display Basic Salary:	<input type="checkbox"/>

- iii) Once the process is complete and you click "**Create MPF File**," a message will appear. Click "**OK**" to proceed.



iv) In your inbox, select a file location and click "**Save**" to save the eMPF file for submission to the eMPF Platform

## Inbox

### Message Detail

<a href="#">- Back -</a>	<a href="#">Delete</a>		
From:	SYSTEM	Date:	2024-11-15 11:32:10
Subject:	eMPF_Template		
Attachment:	<a href="#">MPFRemittanceStatement_20241115113210.pdf</a> <a href="#">eMPF_Template_20241115113210.xls</a>		

## Appendix 2 Additional Resources

iManager Essential eMPF Resources for Users

### A2.1 eMPF Blog

- I. **Navigating Your eMPF Journey with People Tech: What Employers Need to Know**  
Dive into our comprehensive guide to understand the impact of eMPF on employers and the steps needed for a smooth transition.  
<https://lnkd.in/g3GDrUMx>

### A2.2 Detailed Guides

- I. **Part 1: Understanding the Transition and Trustee Migration Timeline**  
<https://lnkd.in/gBdYEu2R>
- II. **Part 2: Post-Launch Tips and Updates**  
<https://lnkd.in/gxrQVqPm>

### A2.3 Official eMPF Website

- I. **Visit the Official eMPF Website for comprehensive details about the platform**  
[https://www.empf.org.hk/?language\\_id=1](https://www.empf.org.hk/?language_id=1)

### A2.4 Step-by-Step Video Tutorials

- I. **Explore our quick guide to setting up eMPF with iManager**  
<https://youtu.be/SZx2vyhgmEA>