

# **SASSETA INDICIUM**

## **Skills Module**

### **Training Manual**

**SASSETA**  
**SAFETY & SECURITY**

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## 1. Introduction

### 1.1 Purpose of this document

The purpose of this document is to ensure that SASSETA internal users and SDF's are equipped with all the information pertaining to the SASSETA Indicium system. This manual will assist users to perform their specific tasks on the system.



## 2. Log-in page

The SASSETA Indicium system can be accessed with the following link: <http://197.98.24.145/SASSETAIndicium/Account/Login.aspx> . The SASSETA Indicium link will navigate to the SASSETA Indicium Landing Page.



## 3. Maintenance – Skills Maintenance

This section allows SASSETA internal users to maintain the skills module system functionalities.

Steps	Action	Screenshot
1	Click on the Maintenance tab	
2	Select Skills Maintenance from the menu bar	

### 3.1 Letter Creation

This section deals with the WSP and SDF letter creation. The system has been customised to allow SASSETA users to create their own letters every financial year.

Steps	Action	Screenshot
1	Click on Letter creation	Maintenance >>Skills Maintenance >> <b>Letter Creation</b> Query Reasons Rejection Reasons Organisation WSP & ATR Bulk Letters SDF Bulk Letters Designated Email Address SDF Dashboard Documents SDF Bulk Upload DG Maintenance DG Budget Maintenance Letter Creation DG
<b>WSP Letters</b>		
2	Click on the "Create New" button to create WSP letters	<b>Create New</b>
3	Select the Financial year value	Financial Year <span style="border: 1px solid black; padding: 2px;">01 April 2020 – 31 March 2021</span>
4	Select the "WSP" value from the CRM Letter Grant Type dropdown list	CRM Letter Grant Type <span style="border: 1px solid black; padding: 2px;">WSP</span>
5	Select the Letter type that needs to be created	<div style="background-color: #0070C0; color: white; padding: 5px; text-align: center; font-weight: bold;">LETTER CREATION</div> CRM Letter Type <span style="border: 1px solid black; padding: 2px;">             Approval Letter              On Hold              Query Letter  <b>Receipt Letter</b>              Rejection Letter           </span>
6	Select the desired Letter Salutation	CRM Letter Salutation <span style="border: 1px solid black; padding: 2px;">             Dear              To whom it may concern           </span>

7	Complete the remaining free-text fields and save the created letter	<div style="background-color: #0056b3; color: white; padding: 5px; text-align: center; font-weight: bold;">LETTER CREATION</div> <p>Financial Year <span style="float: right;">01 April 2020 – 31 March 2021 ▼</span></p> <p>CRM Letter Grant Type <span style="float: right;">WSP ▼</span></p> <p>CRM Letter Type <span style="float: right;">Receipt Letter ▼</span></p> <p>CRM Letter Salutation <span style="float: right;">Dear ▼</span></p> <p>Header A <span style="float: right;">Receipt Letter</span></p> <p>Header B <span style="float: right;"></span></p> <p>Body A <span style="float: right;">Receipt Letter</span></p> <p>Characters Left Body A <span style="float: right;">1986</span></p> <p>Body B <span style="float: right;">Receipt Letter</span></p> <p>Characters Left Body B <span style="float: right;">1986</span></p> <p>CRM Letter Greeting <span style="float: right;">Yours in Skills Development, ▼</span></p> <p>Sign Off Name <span style="float: right;">Test</span></p> <p>Job Title <span style="float: right;">Skills Practitioner</span></p> <p style="text-align: center;"><input type="button" value="Save"/></p>
<b>SDF Letters</b>		
8	Click on the "Create New" button to create WSP letters	<input type="button" value="Create New"/>
9	Select the Financial year value	Financial Year <span style="float: right;">01 April 2020 – 31 March 2021 ▼</span>
10	Select the "WSP" value from the CRM Letter Grant Type dropdown list	CRM Letter Grant Type <span style="float: right;">SDF ▼</span>
11	Select the Letter type that needs to be created	<div style="background-color: #0056b3; color: white; padding: 5px; text-align: center; font-weight: bold;">LETTER CREATION</div> <p>CRM Letter Type</p> <div style="border: 1px solid black; padding: 5px; margin-left: 20px;">       Approval Letter        On Hold        Query Letter  <span style="background-color: #0056b3; color: white; padding: 2px;">Receipt Letter</span>        Rejection Letter     </div>
12	Select the desired Letter Salutation	CRM Letter Salutation <span style="float: right;">Dear</span> <span style="float: right;">To whom it may concern</span>

<b>13</b>	Complete the remaining free-text fields and save the created letter	<b>LETTER CREATION</b>	
		<b>Financial Year</b> <b>CRM Letter Grant Type</b> <b>CRM Letter Type</b> <b>CRM Letter Salutation</b> <b>Header A</b> <b>Header B</b> <b>Body A</b>  <b>Characters Left Body A</b> <b>Body B</b>  <b>Characters Left Body B</b> <b>CRM Letter Greeting</b> <b>Sign Off Name</b> <b>Job Title</b> <input type="button" value="Save"/>	<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">01 April 2020 – 31 March 2021 ▾</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">WSP ▾</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Receipt Letter ▾</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Dear ▾</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Receipt Letter</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"></div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Receipt Letter</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">1986</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Receipt Letter</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">1986</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Yours in Skills Development, ▾</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Test</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Skills Practitioner</div>

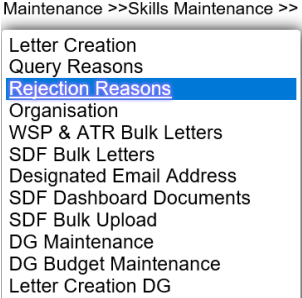

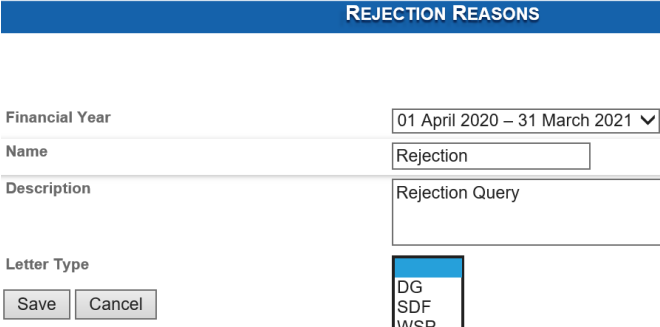
### 3.2 Query Reasons

This section deals with the creation of Query reasons.

Steps	Action	Screenshot
<b>1</b>	Click on Query Reasons	Maintenance >>Skills Maintenance >> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;">Letter Creation</div> <div style="background-color: #00838f; color: white; padding: 2px; margin-bottom: 2px;">Query Reasons</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;">Rejection Reasons</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;">Organisation</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;">WSP &amp; ATR Bulk Letters</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;">SDF Bulk Letters</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;">Designated Email Address</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;">SDF Dashboard Documents</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;">SDF Bulk Upload</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;">DG Maintenance</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;">DG Budget Maintenance</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;">Letter Creation DG</div>
<b>2</b>	Click on Add Query Reasons	<input type="button" value="Add Query Reasons"/>
<b>3</b>	Select the Financial Year value and complete the remaining free-text fields.	<div style="background-color: #0056b3; color: white; text-align: right; padding: 5px; margin-bottom: 10px;"><b>QUERY REASONS</b></div> <b>Financial Year</b> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">01 April 2020 – 31 March 2021 ▾</div> <b>Name</b> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Query</div> <b>Description</b> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Query Reasons</div> <b>Letter Type</b> <div style="display: flex; align-items: center; gap: 10px;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> <div style="border: 1px solid #ccc; padding: 2px; margin-left: 20px;">           DG            SDF            WSP         </div> </div>

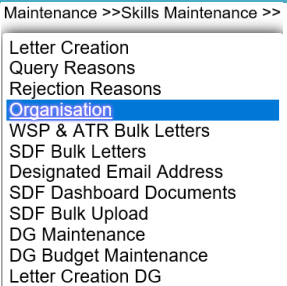

### 3.3 Rejection Reasons

This section deals with the creation of Rejection reasons.

Steps	Action	Screenshot
1	Click on Rejection Reasons	 <p>Maintenance &gt;&gt;Skills Maintenance &gt;&gt;</p> <ul style="list-style-type: none"> <li>Letter Creation</li> <li>Query Reasons</li> <li><b>Rejection Reasons</b></li> <li>Organisation</li> <li>WSP &amp; ATR Bulk Letters</li> <li>SDF Bulk Letters</li> <li>Designated Email Address</li> <li>SDF Dashboard Documents</li> <li>SDF Bulk Upload</li> <li>DG Maintenance</li> <li>DG Budget Maintenance</li> <li>Letter Creation DG</li> </ul>
2	Click on Add Rejection Reasons	 <p>Add Rejection Reasons</p>
3	Select the Financial Year value and complete the remaining free-text fields.	 <p><b>REJECTION REASONS</b></p> <p>Financial Year: 01 April 2020 – 31 March 2021</p> <p>Name: Rejection</p> <p>Description: Rejection Query</p> <p>Letter Type: DG, SDF, WSP</p> <p>Buttons: Save, Cancel</p>

### 3.4 Creating an Organisation

This section deals with the creation of Organisations.

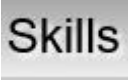
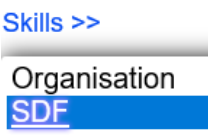
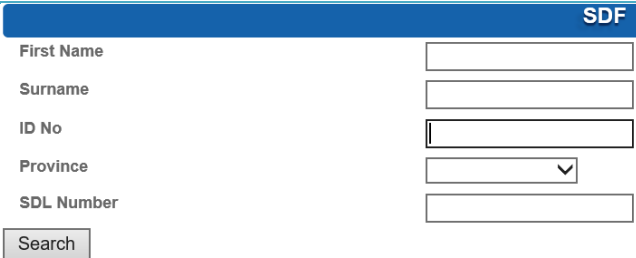
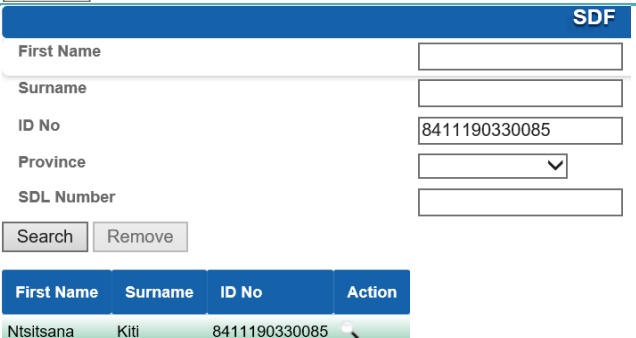
Steps	Action	Screenshot
1	Click on Organisation	 <p>Maintenance &gt;&gt;Skills Maintenance &gt;&gt;</p> <ul style="list-style-type: none"> <li>Letter Creation</li> <li>Query Reasons</li> <li>Rejection Reasons</li> <li><b>Organisation</b></li> <li>WSP &amp; ATR Bulk Letters</li> <li>SDF Bulk Letters</li> <li>Designated Email Address</li> <li>SDF Dashboard Documents</li> <li>SDF Bulk Upload</li> <li>DG Maintenance</li> <li>DG Budget Maintenance</li> <li>Letter Creation DG</li> </ul>
2	Click on Create New	 <p>Create New</p>



<b>3</b>	Select the Financial Year value and complete the remaining free-text fields.	<b>REJECTION REASONS</b>	
		Financial Year <span style="float: right;">01 April 2020 – 31 March 2021 ▼</span> Name <input type="text" value="Rejection"/> Description <input type="text" value="Rejection Query"/> Letter Type <span style="float: right;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </span>	DG SDF WSP

### 3.5 SDF Application Evaluation

This section allows SASSETA users to evaluate SDF applications.

Steps	Action	Screenshot
<b>View SDF personal details and Organisation Letter of Appointment</b>		
<b>1</b>	Click on the Skills Menu tab	
<b>2</b>	Select SDF from the sub-tab	
<b>3</b>	Search for an SDF using one of the search criteria	
<b>4</b>	When the SDF record is returned, click on it until it is highlighted and select the Action icon	

**5** You can view the SDF Person Details.

Skills >>SDF >>

PERSON DETAILS - NTSITSANA KITI 8411190330085

Person Details  
Organisation Details

Edit

ID No 8411190330085  
Alternate ID Type 0  
Title Ms  
First Name Ntsitsana  
Middle Name None  
Surname Kiti  
Initials N  
Date of Birth 19/11/1984  
Gender Female  
Equity Black: African

**6** You can view the Organisation Details of the company they registered for.

Skills >>SDF >>

PERSON DETAILS - NTSITSANA KITI 8411190330085

Person Details  
Organisation Details

**STEP 1: FIRSTLY, you need to add the relevant SDL Number**  
(Click on magnifying glass next to Organisation)

**STEP 2: Only AFTER you have added the relevant SDL Number, you will be able to upload the signed SDF Appointment Letter.**  
(Click on the button next to Letter of Appointment: Select Upload)

Organisation

Letter of Appointment: Select upload  Browse...

Save

Remove

Organisation Name	SDL Number	Status	Document Name
De-appointed	X000000002		<a href="#">Assessments Workflow.pdf</a>

**7** You can also view the uploaded Letter of Appointment by clicking on the hyperlink

Organisation Name	SDL Number	Status	Document Name
De-appointed	X000000002		<a href="#">Assessments Workflow.pdf</a>
UAT Test 2	X000000001		<a href="#">Assessments Workflow.pdf</a>

**Accepting SDF Application**

**8** Click on the Skills Menu tab

Skills

**9** Select Organisation from the sub-tab

Skills >>

Organisation  
SDF

**10** Search for an organisation using one of the search criteria

ORGANISATION

Legal Name

Trade Name

SDL Number

SIC Code

SDF Name

Search

**11** When the organisation record is returned, click on it until it is highlighted and select the Action icon

ORGANISATION

Legal Name

Trade Name

SDL Number

SIC Code

SDF Name




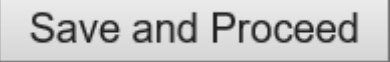
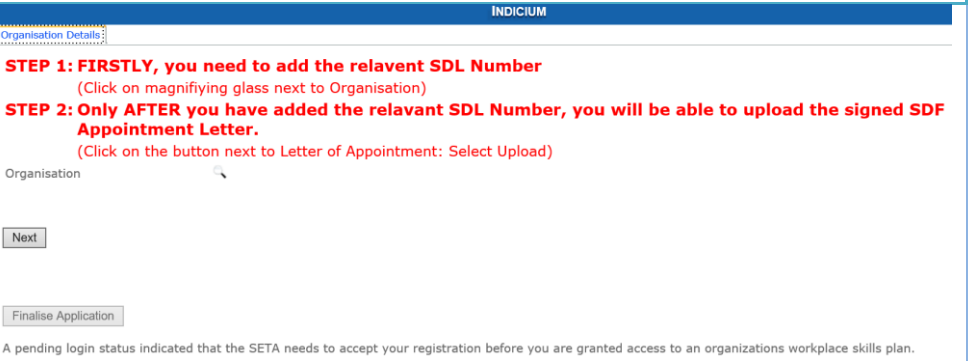

Search Remove Organisation



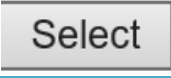

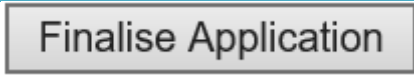
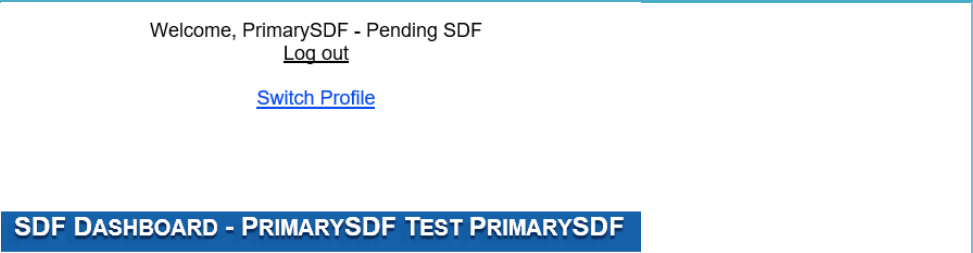
Legal Name	Trade Name	SDL Number	SIC Code	Parent SDL Number	Action
UAT Test 2	UAT Test 2	X000000001	9110C - JUSTICE		

<p><b>12</b></p>	<p>On the Organisation sub-tab select Associate SDF to update the SDF's status.</p>	<p>Skills &gt;&gt; Organisation &gt;&gt;</p> <ul style="list-style-type: none"> <li>Organisation Details</li> <li>Organisation Contact</li> <li>Organisation Bank Details</li> <li>Link Organisation</li> <li>Organisation CFO Details</li> <li>Approved SDFs</li> <li><b>Associate SDF</b></li> <li>Plan and Report</li> <li>Training Committee</li> <li>Document Uploads</li> <li>Mandatory Grant Evaluation</li> </ul> <p>ASSOCIATE SDF - UAT TEST 2 (X000000001)</p> <p>Edit Resend Letter</p> <table border="1"> <thead> <tr> <th>First Name</th> <th>Surname</th> <th>E Mail</th> <th>Status</th> <th>Role</th> <th>Letter Of Appointment</th> </tr> </thead> <tbody> <tr> <td>NELI</td> <td>BOPHELA</td> <td>matthew@crimzone.com</td> <td>Deactivated</td> <td>Primary</td> <td><a href="#">NLRD File Count.PNG</a></td> </tr> <tr> <td>Ntsitsana</td> <td>Kiti</td> <td>matthew@crimzone.com</td> <td>Accepted</td> <td>Primary</td> <td><a href="#">NewReportpdf.pdf</a></td> </tr> <tr> <td>Ntsitsana</td> <td>Kiti</td> <td>nkiti@solugrowth.com</td> <td></td> <td></td> <td><a href="#">Assessments Workflow.pdf</a></td> </tr> </tbody> </table>	First Name	Surname	E Mail	Status	Role	Letter Of Appointment	NELI	BOPHELA	matthew@crimzone.com	Deactivated	Primary	<a href="#">NLRD File Count.PNG</a>	Ntsitsana	Kiti	matthew@crimzone.com	Accepted	Primary	<a href="#">NewReportpdf.pdf</a>	Ntsitsana	Kiti	nkiti@solugrowth.com			<a href="#">Assessments Workflow.pdf</a>
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Ntsitsana	Kiti	nkiti@solugrowth.com			<a href="#">Assessments Workflow.pdf</a>																					
<p><b>13</b></p>	<p>Select the SDF you want to approve for that organisation and click on the Edit button</p>	<p>ASSOCIATE SDF - UAT TEST 2 (X000000001)</p> <p>Edit Resend Letter</p> <table border="1"> <thead> <tr> <th>First Name</th> <th>Surname</th> <th>E Mail</th> <th>Status</th> <th>Role</th> <th>Letter Of Appointment</th> </tr> </thead> <tbody> <tr> <td>NELI</td> <td>BOPHELA</td> <td>matthew@crimzone.com</td> <td>Deactivated</td> <td>Primary</td> <td><a href="#">NLRD File Count.PNG</a></td> </tr> <tr> <td>Ntsitsana</td> <td>Kiti</td> <td>matthew@crimzone.com</td> <td>Accepted</td> <td>Primary</td> <td><a href="#">NewReportpdf.pdf</a></td> </tr> <tr> <td>Ntsitsana</td> <td>Kiti</td> <td>nkiti@solugrowth.com</td> <td></td> <td></td> <td><a href="#">Assessments Workflow.pdf</a></td> </tr> </tbody> </table>	First Name	Surname	E Mail	Status	Role	Letter Of Appointment	NELI	BOPHELA	matthew@crimzone.com	Deactivated	Primary	<a href="#">NLRD File Count.PNG</a>	Ntsitsana	Kiti	matthew@crimzone.com	Accepted	Primary	<a href="#">NewReportpdf.pdf</a>	Ntsitsana	Kiti	nkiti@solugrowth.com			<a href="#">Assessments Workflow.pdf</a>
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Ntsitsana	Kiti	nkiti@solugrowth.com			<a href="#">Assessments Workflow.pdf</a>																					
<p><b>14</b></p>	<p>Select the SDF Status and Role, then click Save</p>	<p>UPDATE SDF</p> <p>First Name: Ntsitsana</p> <p>Surname: Kiti</p> <p>Status: Accepted</p> <p>Role: Primary</p> <p>Save Cancel</p>																								
<p><b>15</b></p>	<p>The system will give you an option to either email a letter to the SDF or download it.</p>	<p>SEND LETTER</p> <p>Current Status: Accepted</p> <p>Financial Year: 01 April 2020 – 31 March</p> <table border="1"> <thead> <tr> <th>Salutation</th> <th>Header</th> <th>Greeting</th> <th>Sign Off Name</th> <th>Job Title</th> </tr> </thead> <tbody> <tr> <td>To whom it may concern</td> <td>SDF registration Approval Letter</td> <td>Yours in Skills Development,</td> <td>MG Team</td> <td>MG Practitioner</td> </tr> </tbody> </table> <p>First Previous Next Last Go to Page 1 Page 1 of 1</p> <p>PREVIEW</p> <p><b>SDF registration Approval Letter</b></p> <p>To whom it may concern</p> <p>Your SDF registration has been approved.</p> <p>Yours in Skills Development,</p> <p>MG Team</p> <p>MG Practitioner</p> <p>Email Letter Download Letter Cancel</p>	Salutation	Header	Greeting	Sign Off Name	Job Title	To whom it may concern	SDF registration Approval Letter	Yours in Skills Development,	MG Team	MG Practitioner														
Salutation	Header	Greeting	Sign Off Name	Job Title																						
To whom it may concern	SDF registration Approval Letter	Yours in Skills Development,	MG Team	MG Practitioner																						
<p><b>16</b></p>	<p>The SDF Approval letter will be sent to the SDF</p>	<p></p> <p>SDF Approval Letter.msg</p>																								

## 4 Register as an SDF

This section allows SDF's to register their profiles in the SASSETA Indicum system.

Steps	Action	Screenshot
<b>Step 1: Applicant Details</b>		
1	Click on Register as a new SDF hyperlink	
2	Select the profile you wish to register for	
3	Click on the Register button	
4	Complete the Applicant Details page	
5	Click the Save and Proceed button	
<b>Step 1: Organisation Details</b>		
6	When the Applicant Details page is completed, the SDF will have to link themselves to an Organisation on the Organisation Details page.	
7	Click on the search icon to search for an Organisation	

8	Input the Organisation's SDL Number	
9	Click on the Search button. The system will return the existing organisation.	
10	Select the organisation and click the Select button	
11	Click the Next button. A Letter of Appointment needs to be uploaded to complete the registration process	
	When the document is successfully uploaded click on Finalise Application button.	
12	The SDF will receive an Acknowledgment of Skills Development Facilitator Registration email with their login credentials attached.	
13	Please note that this does not mean that access onto the system has been given yet. The Skills Advisor at SASSETA will have to go through all details and then either approve or reject the registration.	

## 5 Access to the system

This section allows the SDF to login to the SASSETA Indicum system.

Steps	Action	Screenshot
1	Once SASSETA has reviewed the necessary information that was provided and all is in order, SASSETA will inform the SDF that they have been awarded access to the system and may start completing the 20/21 Mandatory Grant Forms.	

2	The SDF will access the login page to enter their login credentials.	
<b>SDF Dashboard</b>		
3	The SDF Dashboard will display all the companies the SDF has registered for.	
4	Click on any row of Companies listed on the dashboard to access that specific organisation details.	
5	Click on the Action icon to open the organisation details	

## 6 Organisation Info page

In this section the registered SDF needs to confirm the Organisation info on the Organisation Details page before accessing the Plan & Report tab. The system allows SDF's to edit the data added.

Steps	Action	Screenshot
<b>Edit Organisation Details</b>		
1	Click on the Organisation Details tab	
2	Click the Edit button to complete the remaining Organisation details	
3	After completing the Organisation details, the SDF needs to confirm the details by ticking the "Confirm Organisation Details" checkbox	

**Create Organisation Contact persons**

4	Click on the Organisation Contact tab	<b>Organisation Contact</b>
---	---------------------------------------	-----------------------------

5	Select the Create button to create contact person details.	<p style="text-align: right;"><b>ORGANISATION CONTACT - SMALL ORG (T000000011)</b></p> <p>Create Edit Remove</p>
---	--	--

6	Complete all the required fields and click on the Save button	<p style="text-align: right;"><b>CREATE ORGANISATION CONTACT</b></p> <p>Title <input type="text"/> <b>Required</b></p> <p>First Name <input type="text"/> <b>Required</b></p> <p>Surname <input type="text"/> <b>Required</b></p> <p>Initials <input type="text"/> <b>Required</b></p> <p>Designation <input type="text"/> <b>Required</b></p> <p>Telephone Number <input type="text"/> <b>Required</b></p> <p>Cell Phone Number <input type="text"/> <b>Required</b></p> <p>Fax Number <input type="text"/></p> <p>E Mail <input type="text"/> <b>Required</b></p> <p>Postal Address Line 1 <input type="text"/> <b>Required</b></p> <p>Postal Address Line 2 <input type="text"/> <b>Required</b></p> <p>Postal Address City <input type="text"/> <b>Required</b></p> <p>Postal Code <input type="text"/> <b>Required</b></p> <p>Province <input type="text"/></p> <p>Save Cancel</p>
---	---	---

7	The saved records will display	<p style="text-align: right;"><b>ORGANISATION CONTACT - SMALL ORG (T000000011)</b></p> <p>Create Edit Remove</p> <table border="1"> <thead> <tr> <th>Title</th> <th>First Name</th> <th>Surname</th> <th>Initials</th> <th>Designation</th> <th>Telephone Number</th> <th>Call Phone Number</th> <th>Fax Number</th> <th>E Mail</th> <th>Postal Address Line 1</th> <th>Postal Address Line 2</th> <th>Postal Address City</th> <th>Postal Code</th> <th>Province</th> </tr> </thead> <tbody> <tr> <td>Ms</td> <td>Registered SDF</td> <td>Test</td> <td>R</td> <td>HR Manager</td> <td>01245678909</td> <td>01245678909</td> <td></td> <td>nikiti@solugrowth.com</td> <td>Postal Address Line 1</td> <td>Postal Address Line 2</td> <td>Pretoria</td> <td>0208</td> <td>Gauteng</td> </tr> </tbody> </table>	Title	First Name	Surname	Initials	Designation	Telephone Number	Call Phone Number	Fax Number	E Mail	Postal Address Line 1	Postal Address Line 2	Postal Address City	Postal Code	Province	Ms	Registered SDF	Test	R	HR Manager	01245678909	01245678909		nikiti@solugrowth.com	Postal Address Line 1	Postal Address Line 2	Pretoria	0208	Gauteng
Title	First Name	Surname	Initials	Designation	Telephone Number	Call Phone Number	Fax Number	E Mail	Postal Address Line 1	Postal Address Line 2	Postal Address City	Postal Code	Province																	
Ms	Registered SDF	Test	R	HR Manager	01245678909	01245678909		nikiti@solugrowth.com	Postal Address Line 1	Postal Address Line 2	Pretoria	0208	Gauteng																	

**Complete Organisation Banking Details**

8	Click on Organisation Bank Details	<b>Organisation Bank Details</b>
---	------------------------------------	----------------------------------

9	<p>Complete all the required fields and tick on the "Confirm banking details updated" checkbox before saving the information.</p> <p><b>Note: It is compulsory to upload the Bank Confirmation Letter. The system will not allow you to submit your Mandatory Grant forms if the document is not uploaded.</b></p>	<p style="text-align: right;"><b>ORGANISATION BANK DETAILS - SMALL ORG (T000000011)</b></p> <p>Account Holder <input type="text"/> <b>*Required</b></p> <p>Bank Name <input type="text"/> <b>*Required</b></p> <p>Other Bank <input type="text"/></p> <p>Account Type <input type="text"/> <b>*Required</b></p> <p>Account Number <input type="text"/> <b>*Required</b></p> <p>Branch Name <input type="text"/> <b>*Required</b></p> <p>Branch Code <input type="text"/> <b>*Required</b></p> <p>Last Date Updated</p> <p>Last Updated by</p> <p>Confirm banking details updated <input type="checkbox"/></p> <p>Company Name Change Information <input type="text"/> Browse...</p> <p>Bank Confirmation Letter (Stamped by Bank) <input type="text"/> Browse...</p> <p><b>Upload recent (not older than 3 months) Banking details.</b></p>
---	--	---

10	Click on the Save button	<b>Save</b>
----	--------------------------	-------------


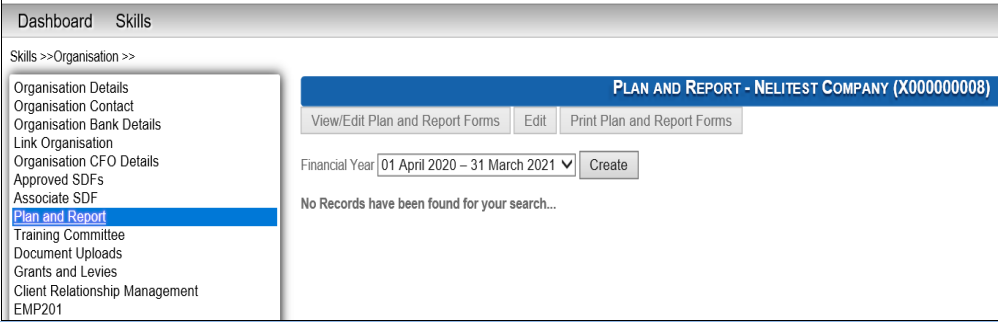
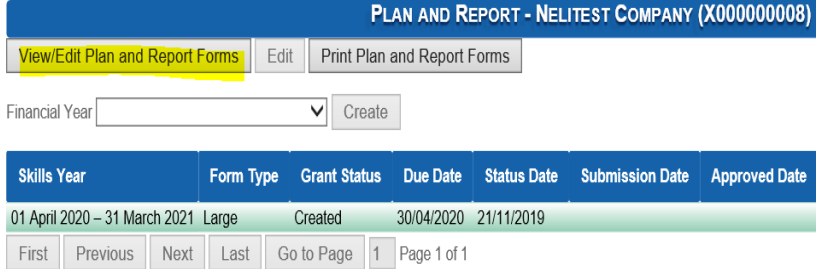

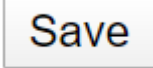
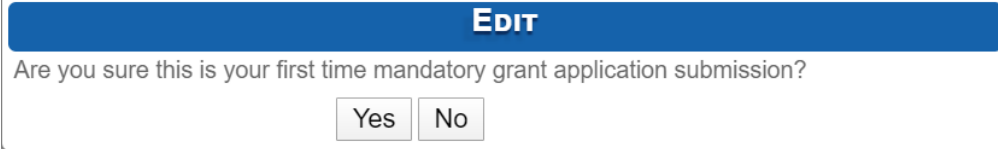
**Complete Organisation CFO Details**

11	Click on Organisation CFO Details tab	<b>Organisation CFO Details</b>
12	Click on the Edit button to complete the required fields	<p style="text-align: center;"><b>ORGANISATION CFO DETAILS - SMALL ORG (T000000011)</b></p> <p>First Name <input type="text"/> <b>Required</b></p> <p>Surname <input type="text"/> <b>Required</b></p> <p>Cell Phone Number <input type="text"/> <b>Required</b></p> <p>Fax Number <input type="text"/></p> <p>E Mail <input type="text"/> <b>Required</b></p> <p>Designation <input type="text"/> <b>Required</b></p> <p>Telephone Number <input type="text"/> <b>Required</b></p> <p><input type="button" value="Save"/> <input type="button" value="Cancel"/></p>
<b>Complete Training Committee details</b>		
13	Click on the Training Committee tab	<b>Training Committee</b>
14	<b>Note:</b> The Organisation requires more than 150 Employees for the Training Committee details to be completed.	<p style="text-align: center;"><b>TRAINING COMMITTEE - SMALL ORG (T000000011)</b></p> <p><b>Organisation requires more than 150 Employees</b></p>
<b>Upload the required documents</b>		
15	Click on the Document Uploads tab	<b>Document Uploads</b>
16	From the Documentation Type dropdown list, the SDF will select the document they want to upload.  Click on the Add Document button	<p style="text-align: center;"><b>DOCUMENT UPLOADS - SMALL ORG (T000000011)</b></p> <p>Documentation Type <input type="text" value="Authorisation Page"/></p> <p><input type="button" value="Add Document"/> Training Committee minutes Proof of training</p>
17	Select the Browse button to upload a document saved on a computer.	<p style="text-align: center;"><b>SEND DOCUMENT</b></p> <p>Financial Year <input type="text" value="01 April 2020 – 31 March 2021"/></p> <p>Document Relates to <input type="text" value="Authorisation Page"/></p> <p>Comment <input type="text"/></p> <p>Document <input type="text" value="C:\Users\inkiti\Documents\Work\Sasseta\2019"/> <input type="button" value="Browse..."/></p>
18	Click the Upload button	<input type="button" value="Upload"/>



## 7 Completing Mandatory Grant Forms

In this section the SDF will complete the MG forms under the Plan and Report tab

Steps	Action	Screenshot								
1	Click on Plan and Report tab									
2	General Rules	<p>The following rules apply before creating the Plan and Report forms</p> <table border="1"> <tr> <td>1</td> <td>Organisation Details must be confirmed</td> </tr> <tr> <td>2</td> <td>At least one person should be captured under Organisation Contact</td> </tr> <tr> <td>4</td> <td>Banking details must be confirmed</td> </tr> <tr> <td>5</td> <td>Training Committee (a minimum of 2 Employer representatives and 2 Employee representatives must be captured as well as the SDF) for the current financial year (For Organisations that require more than 150 Employees)</td> </tr> </table>	1	Organisation Details must be confirmed	2	At least one person should be captured under Organisation Contact	4	Banking details must be confirmed	5	Training Committee (a minimum of 2 Employer representatives and 2 Employee representatives must be captured as well as the SDF) for the current financial year (For Organisations that require more than 150 Employees)
1	Organisation Details must be confirmed									
2	At least one person should be captured under Organisation Contact									
4	Banking details must be confirmed									
5	Training Committee (a minimum of 2 Employer representatives and 2 Employee representatives must be captured as well as the SDF) for the current financial year (For Organisations that require more than 150 Employees)									
3	Click on the Create Button to create the MG forms									
4	Click on the newly created Mandatory Grant record and select the View/Edit Plan and Report Forms button to proceed to the forms									
5	The System will prompt you to indicate whether this is your first-time mandatory grant application submission									
6	Click on the Save button to proceed to the forms									
7	If you select "Yes" you will be asked if you are sure this is your first-time mandatory grant application submission.									

<b>7</b>	The landing page will display the Planning Grant and Implementation Grant forms	<b>#</b>	<b>Form</b>	<b>Description</b>	<b>Due Date</b>	<b>Select</b>
				Planning Grant		Select
		1.	A	Administrative Details	30/04/2020	Select
		2.	B	Finance Details	30/04/2020	Select
		3.	C1	Employment Summary	30/04/2020	Select
		4.	C2	Employee Provincial Breakdown	30/04/2020	Select
		5.	D1	Scarce Skills (Hard to fill vacancies)	30/04/2020	Select
		6.	D2	Critical Skills (Top-up)	30/04/2020	Select
		7.	E1	Strategic Objectives	30/04/2020	Select
		8.	E2	List the Training Priorities	30/04/2020	Select
		9.	E3	Planned Beneficiaries of training	30/04/2020	Select
		10.	E4	Planned Adult Education and Training	30/04/2020	Select
		11.	F	Planned Beneficiaries of Pivotal Training	30/04/2020	Select
				Implementation Grant		Select
		12.	G1	Actual Training	30/04/2020	Select
		13.	G2	Completed AET Programmes	30/04/2020	Select
		14.	G3	Expenditure of Training Budget	30/04/2020	Select
		15.	G4	Impact Assessment	30/04/2020	Select
16.	H1	Actual Pivotal Training	30/04/2020	Select		
17.	H2	Expenditure of Pivotal Training	30/04/2020	Select		
18.	I	Variance report	30/04/2020	Select		
<b>6</b>	Click on the Select button to complete each form					
<b>7</b>	The compulsory forms are listed below per Organisation size					



<b>Planning Grant</b>				
<b>#</b>	<b>Form</b>	<b>Description</b>	<b>Due Date</b>	<b>Compulsory</b>
1	A	Administrative Details	30/04/2020	Y
2	B	Finance Details	30/04/2020	Y
3	C1	Employment Summary	30/04/2020	Y
4	C2	Employee Provincial Breakdown	30/04/2020	Y
5	D1	Scarce Skills (Hard to fill vacancies)	30/04/2020	Y
6	D2	Critical Skills (Top-up)	30/04/2020	Y
7	E1	Strategic Objectives	30/04/2020	Y – except for small and medium private companies
8	E2	List the Training Priorities	30/04/2020	Y
9	E3	Planned beneficiaries of training	30/04/2020	Y
10	E4	Planned Adult Education and Training	30/04/2020	Y – except for Private companies
11	F	Planned Beneficiaries of Pivotal Training	30/04/2020	Y
<b>Implementation Grant</b>				



12	G1	Actual Training	30/04/2020	Y *Only if the previous WSP was submitted.
13	G2	Completed AET Programmes	30/04/2020	Y – for public companies
14	G3	Expenditure of Training	30/04/2020	Y
15	G4	Impact Assessment	30/04/2020	Y – except for private companies
16	H1	Actual Pivotal Training	30/04/2020	Y System must check if form F (Planned Beneficiaries of Pivotal Training) of previous submission was completed
17	H2	Expenditure of Pivotal Training	30/04/2020	Y
18	I	Variance Report	30/04/2020	Y

## 7.1 Planning Grant

### 7.1.1 Form A: Administrative Details

This form is compulsory for both Public and Private entities, and all organisation sizes.

Steps	Action	Screenshot
1	Click on the Select button to open the form	
2	You will be prompted to complete the form first before proceeding to the next form - Form B: FinanceDetails.	

Administrative Details	
Organisation Details	
Organisation Name	UAT Test Organisation
Skills Development Levy Number (SDL)	X000000002
Physical Code	0181
Physical Address Line 1	333 Main street Brooklyn
Physical Address Line 2	Address Line2
Physical Address Line 3	Cape Town
Physical Municipality	 Tshwane Metro
Physical Urban Rural	Urban ▼
Physical Province	Gauteng ▼
Postal Code	0181
Postal Address Line 1	PO BOX 6144
Postal Address Line 2	Address Line1
Postal Address Line 3	Weltevredenpark
Postal Municipality	 Tshwane Metro
Postal Urban Rural	Urban ▼
Postal Province	Gauteng ▼
Standard Industry Code (SIC) for Main Business Activity	9110C - JUSTICE

Contact Details		
Title		Ms ▼
Surname		<input type="text"/>
First Name		<input type="text"/>
ID Number		8411190330085
Cell Phone Number		<input type="text" value="0821111111"/>
Email Address		<input type="text" value="nkiti@solugrowth.com"/>
Postal Code		<input type="text"/>
Postal Address Line 1		<input type="text"/>
Postal Address Line 2		<input type="text"/>
Postal Address Line 3		<input type="text"/>
Postal Municipality		<input type="text" value="Tshwane Metro"/>
Postal Urban Rural		Urban ▼
Postal Province		Gauteng ▼
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		
3	Only when the record is saved successfully the Next Form button will be active.	<input type="button" value="Save"/> <input type="button" value="Cancel"/> <p>The Record has been saved successfully</p>

### 7.1.2 Form B: Finance Details

This form is compulsory for both Public and Private entities, and all organisation sizes.

Steps	Action	Screenshot
1	Note: Public entities must complete <b>Section B: Training Budget</b> .	

**Finance Details**
**Contact details of the CFO or relevant financial person**

<b>First Name</b>	Tester
<b>Surname</b>	Test
<b>Designation</b>	CFO
<b>Telephone Number</b>	0112989777
<b>Cell phone Number</b>	0798989898
<b>Email Address</b>	nkiti@solugrowth.com

**Bank Details**

<b>Name of Bank</b>	First National Bank
<b>Type of Account</b>	Current
<b>Account Number</b>	123456789
<b>Account Holder</b>	UAT Person
<b>Branch Name</b>	Brooklyn
<b>Branch Code</b>	632005

**SECTION B: TRAINING BUDGET**

<b>B1: Total Personnel budget for the current financial year</b>	R 250000
<b>B2: One percent (1%) of the personnel budget</b>	R 2500
<b>B3: Total planned training budget for the current financial year</b>	R 1000000
<b>B4: Additional funding planned for the current financial year</b>	R 500000

 
**2**

Click the Save button to save your records successfully.

The Record has been saved successfully

### 7.1.3 Form C1: Employment Summary

This form is compulsory for both Public and Private entities, and all organisation sizes.

Steps	Action	Screenshot																																													
1	You will be prompted to complete the form first before proceeding to the next form - Form C2: Employee Provincial Breakdown																																														
2	Click on the magnifying glass icon to search for an OFO Occupation																																														
3	<p>You may use one of the search criteria to search for the OFO Occupation:</p> <ul style="list-style-type: none"> <li>- OFO Code</li> <li>- OFO Description</li> </ul> <p><b>OR</b></p> <p>You may click on the Search button and the system will return all the latest OFO Occupations.</p> <p>Once you have identified the correct OFO Occupation, click on the record; the record will be highlighted, and lastly click on the Select button.</p>	<table border="1"> <thead> <tr> <th>OFO Code</th> <th>OFO Description</th> </tr> </thead> <tbody> <tr><td>2019-111101</td><td>Local or Provincial Government Legislator</td></tr> <tr><td>2019-111102</td><td>Parliamentarian</td></tr> <tr><td>2019-111201</td><td>Defence Force Senior Officer</td></tr> <tr style="background-color: #e0f2f1;"><td>2019-111202</td><td>General Manager Public Service</td></tr> <tr><td>2019-111203</td><td>Local Authority Manager</td></tr> <tr><td>2019-111204</td><td>Senior Government Official</td></tr> <tr><td>2019-111205</td><td>Senior Police Officer</td></tr> <tr><td>2019-111206</td><td>Ombudsperson</td></tr> <tr><td>2019-111207</td><td>Senior Government Manager</td></tr> <tr><td>2019-111301</td><td>Traditional Leader</td></tr> </tbody> </table>	OFO Code	OFO Description	2019-111101	Local or Provincial Government Legislator	2019-111102	Parliamentarian	2019-111201	Defence Force Senior Officer	2019-111202	General Manager Public Service	2019-111203	Local Authority Manager	2019-111204	Senior Government Official	2019-111205	Senior Police Officer	2019-111206	Ombudsperson	2019-111207	Senior Government Manager	2019-111301	Traditional Leader																							
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2019-111206	Ombudsperson																																														
2019-111207	Senior Government Manager																																														
2019-111301	Traditional Leader																																														
4	The system will adopt your selected records																																														
5	Click on the magnifying glass icon to search for a Geographical area should you wish to update the record																																														
6	Populate only numeric values on each "Gender, population, disability status, and age group" field	<table border="1"> <thead> <tr> <th colspan="3">African</th> <th colspan="3">Coloured</th> <th colspan="3">Indian/Asian</th> <th colspan="3">White</th> <th colspan="3">Age Group</th> </tr> <tr> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> <th>&lt; 35</th><th>35 - 55</th><th>&gt; 55</th> </tr> </thead> <tbody> <tr> <td>10</td><td>0</td><td>1</td> <td>0</td><td>10</td><td>6</td> <td>10</td><td>0</td><td>0</td> <td>0</td><td>20</td><td>13</td> <td>25</td><td>25</td><td>0</td> </tr> </tbody> </table>	African			Coloured			Indian/Asian			White			Age Group			M	F	D	M	F	D	M	F	D	M	F	D	< 35	35 - 55	> 55	10	0	1	0	10	6	10	0	0	0	20	13	25	25	0
African			Coloured			Indian/Asian			White			Age Group																																			
M	F	D	M	F	D	M	F	D	M	F	D	< 35	35 - 55	> 55																																	
10	0	1	0	10	6	10	0	0	0	20	13	25	25	0																																	
7	Click on the Add button to save the records																																														

Major Group	OFO Occupation	Geography	African Male	African Female	African Disabled	Coloured Male	Coloured Female	Coloured Disabled	Indian/Asian Male	Indian/Asian Female	Indian/Asian Disabled	White Male	White Female	White Disabled	Total Male	Total Female	Total Disabled	Age Group - Less than 35	Age Group - 35 to 55	Age Group - Greater than 55
MANAGERS	2019-111202 - General Manager Public Service	Tshwane Metro	10	0	1	0	10	6	10	0	0	0	20	13	20	30	20	25	25	0
Sub Total			10	0	1	0	10	6	10	0	0	0	20	13	20	30	20	25	25	0
Grand Total															50			50		

**8** The Bulk Import functionality may be used to load data in bulks on an excel spreadsheet.

Once the Bulk Import button is clicked, a 'Download Excel Template' hyperlink will be available to generate the excel spreadsheet; and you may save it on your PC to complete it offline.

### Bulk Import

**IMPORT EXCEL DATA**

[Download Excel Template](#)

Upload file to Import

Choose file No file chosen

Import
Cancel

**9** You may edit over the existing records – they're available for your ease of reference.

Leave the cells on Zero "0" if there is nothing to report.

	A	B	C	D	E	F	G
	OFO Occupation	Municipality	African Male	African Female	African Disabled	Coloured Male	Coloured Female
4	2019-111101 - Local or Provincial Government Legislator	Juifort West	1	0	0	0	0
5	2019-111205 - Senior Police Officer	Greater Tzaneen	0	1	0	0	0
6	2019-111102 - Parliamentarian	Mossel Bay	0	1	0	0	0

**10** To upload the completed excel template you must return to the Form and select the Bulk Import button.

Click on the Choose file button to upload the template.

Wait for the upload to highlight in green, and then select Import

### Bulk Import

**IMPORT EXCEL DATA**

[Download Excel Template](#)

Upload file to Import

Choose file 2020\_Employment\_Summary\_V1.xlsx

Import
Cancel

**11** Ensure that the template is completed correctly, if not, the system will reject the uploaded template and return an exception report.

Click on the hyperlink to download the exception report and

African			Coloured			Indian/Asian			White		
M	F	D	M	F	D	M	F	D	M	F	D
0	0	0	0	0	0	0	0	0	0	0	0

Add
Bulk Import
[Click here to download Bulk Import success and exception report](#)



	read the Error Description to identify what needs to be rectified.	
<b>12</b>	Only when the record is saved successfully the Next Form button will be active.	<div style="border: 1px solid black; padding: 5px; display: inline-block;">Next Form</div>

### 7.1.4 Form C2: Employee Provincial Breakdown

This form is compulsory for both Public and Private entities, and all organisation sizes.

Steps	Action	Screenshot																		
<b>1</b>	<b>Note:</b> The total in this section must correlate with the total in Form C1.																			
<b>2</b>	First select the record you want to edit, then select the Edit button to update the form	<table border="1"> <thead> <tr> <th>Western Cape</th> <th>Northern Cape</th> <th>Free State</th> <th>Gauteng</th> <th>Mpumalanga</th> <th>Limpopo</th> <th>North West</th> <th>KZN</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>0</td> <td>50</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>50</td> </tr> </tbody> </table>	Western Cape	Northern Cape	Free State	Gauteng	Mpumalanga	Limpopo	North West	KZN	Total	0	0	0	50	0	0	0	0	50
Western Cape	Northern Cape	Free State	Gauteng	Mpumalanga	Limpopo	North West	KZN	Total												
0	0	0	50	0	0	0	0	50												
<b>3</b>	Populate the numeric values and select the Update button to save the records.	<p>The total in this section must correlate with the total in Form C1.</p> <table border="1"> <thead> <tr> <th>Western Cape</th> <th>Northern Cape</th> <th>Eastern Cape</th> <th>Free State</th> <th>Gauteng</th> <th>Mpumalanga</th> <th>Limpopo</th> <th>North West</th> <th>Kwa Zulu-Natal</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="0"/></td> <td><input type="text" value="0"/></td> <td><input type="text" value="0"/></td> <td><input type="text" value="0"/></td> <td><input type="text" value="50"/></td> <td><input type="text" value="0"/></td> <td><input type="text" value="0"/></td> <td><input type="text" value="0"/></td> <td><input type="text" value="0"/></td> </tr> </tbody> </table>	Western Cape	Northern Cape	Eastern Cape	Free State	Gauteng	Mpumalanga	Limpopo	North West	Kwa Zulu-Natal	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="50"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Western Cape	Northern Cape	Eastern Cape	Free State	Gauteng	Mpumalanga	Limpopo	North West	Kwa Zulu-Natal												
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="50"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>												
<b>12</b>	Click the Next Form button to proceed to the next form – Form D1: Scarce Skills (Hard to fill vacancies)	<div style="border: 1px solid black; padding: 5px; display: inline-block;">Next Form</div>																		

### 7.1.5 Form D1: Scarce Skills (Hard to fill vacancies)

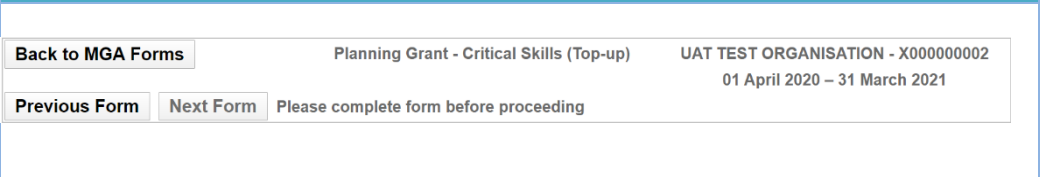
This form is compulsory for both Public and Private entities, and all organisation sizes.

Steps	Action	Screenshot
<b>1</b>	You will be prompted to complete the form first before proceeding to the next form - Form D2: Critical Skills (Top-up)	<p>Back to MGA Forms      Planning Grant - Scarce Skills (Hard to fill vacancies)      UAT TEST ORGANISATION - X000000002</p> <p>01 April 2020 – 31 March 2021</p> <p>Previous Form   Next Form   Please complete form before proceeding</p>

2	If you have nothing to report on this form tick the 'No Scarce Skills' checkbox; however, the 'Reason for not having scarce skills' field is required	<div style="background-color: #0056b3; color: white; padding: 5px; margin-bottom: 5px;"><b>No Scarce Skills</b></div> <div style="display: flex; justify-content: space-between; align-items: center;"> <input checked="" type="checkbox"/> </div> <div style="background-color: #0056b3; color: white; padding: 5px; margin-bottom: 5px;"><b>Reason for not having scarce skills</b></div> <div style="border: 1px solid #ccc; padding: 5px; min-height: 20px;">Reason for not having scarce skills is required</div> <div style="border: 1px solid #ccc; padding: 5px; width: 50px; float: left;">Save</div>
3	Else, if there is information to report, complete the required fields and click Add to save your records successfully.	<div style="background-color: #0056b3; color: white; padding: 5px; margin-bottom: 5px;"><b>Scarce Skills</b></div> <div style="background-color: #0056b3; color: white; padding: 5px; margin-bottom: 5px;"><b>Occupational Category</b></div> <div style="display: flex; justify-content: space-between; align-items: center;"> <input type="text"/> <input type="text"/> </div> <div style="background-color: #0056b3; color: white; padding: 5px; margin-bottom: 5px;"><b>Reasons for the scarcity skills</b></div> <div style="display: flex; justify-content: space-between; align-items: center;"> <input type="text"/> <input type="text"/> </div> <div style="background-color: #0056b3; color: white; padding: 5px; margin-bottom: 5px;"><b>Other Scarce Skills</b></div> <div style="display: flex; justify-content: space-between; align-items: center;"> <input type="text"/> <input type="text"/> </div> <div style="background-color: #0056b3; color: white; padding: 5px; margin-bottom: 5px;"><b>Estimated number</b></div> <div style="display: flex; justify-content: space-between; align-items: center;"> <input type="text"/> <input type="text"/> </div> <div style="background-color: #0056b3; color: white; padding: 5px; margin-bottom: 5px;"><b>Number of qualified persons imported into RSA</b></div> <div style="display: flex; justify-content: space-between; align-items: center;"> <input type="text"/> <input type="text"/> </div> <div style="background-color: #0056b3; color: white; padding: 5px; margin-bottom: 5px;"><b>Name of learning programme that would be undertaken to address the scarce skills</b></div> <div style="display: flex; justify-content: space-between; align-items: center;"> <input type="text"/> <input type="text"/> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 50px; float: left;">Add</div>
4	Click the Next Form button to proceed to the next form.	<div style="border: 1px solid #ccc; padding: 10px; display: inline-block; background-color: #f0f0f0;"> <h2 style="margin: 0;">Next Form</h2> </div>

### 7.1.6 Form D2: Critical Skills (Top-up)

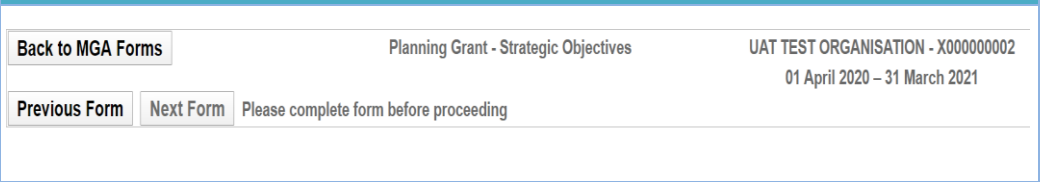
This form is compulsory for both Public and Private entities, and all organisation sizes.

Steps	Action	Screenshot
1	You will be prompted to complete the form first before proceeding to the next form - Form E1: Strategic Objectives	 <p>Back to MGA Forms      Planning Grant - Critical Skills (Top-up)      UAT TEST ORGANISATION - X000000002        01 April 2020 – 31 March 2021</p> <p>Previous Form   Next Form   Please complete form before proceeding</p>
2	If you have nothing to report on this form tick the 'No Critical Skills' checkbox; however, the 'Reason for not having critical skills' field is required	<div style="background-color: #0056b3; color: white; padding: 5px; margin-bottom: 5px;"><b>No Critical Skills</b></div> <div style="display: flex; justify-content: space-between; align-items: center;"> <input checked="" type="checkbox"/> </div> <div style="background-color: #0056b3; color: white; padding: 5px; margin-bottom: 5px;"><b>Reason for not having critical skills</b></div> <div style="border: 1px solid #ccc; padding: 5px; min-height: 20px;">Reason for not having critical skills is required.</div> <div style="border: 1px solid #ccc; padding: 5px; width: 50px; float: left;">Save</div>

<b>3</b>	Else, if there is information to report, complete the required fields and click Add to save your records successfully.	<div style="background-color: #0056b3; color: white; padding: 5px;"><b>Critical Skills</b></div> <div style="background-color: #0056b3; color: white; padding: 5px;"><b>Occupational Category</b></div> <div style="background-color: #0056b3; color: white; padding: 5px;"><b>Reasons for the critical skills</b></div> <div style="background-color: #0056b3; color: white; padding: 5px;"><b>Other Critical Skills</b></div> <div style="background-color: #0056b3; color: white; padding: 5px;"><b>Estimated number</b></div> <div style="background-color: #0056b3; color: white; padding: 5px;"><b>Number of qualified persons imported into RSA</b></div> <div style="background-color: #0056b3; color: white; padding: 5px;"><b>Name of learning programme that would be undertaken to address the scarce and critical skills</b></div> <div style="text-align: right; margin-top: 10px;"> <input type="text"/>   <input type="text"/>   <input type="text"/>   <input type="text"/>   <input type="text"/> </div> <div style="text-align: right; margin-top: 10px;"> <input type="button" value="Add"/> </div>
<b>4</b>	Click the Next Form button to proceed to the next form.	<div style="text-align: center; border: 1px solid #ccc; padding: 10px; width: fit-content; margin: auto;"> <b>Next Form</b> </div>

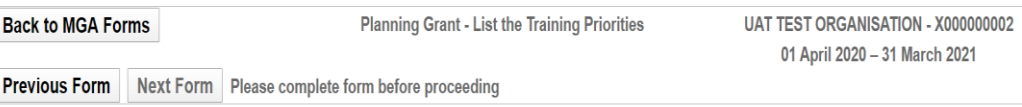
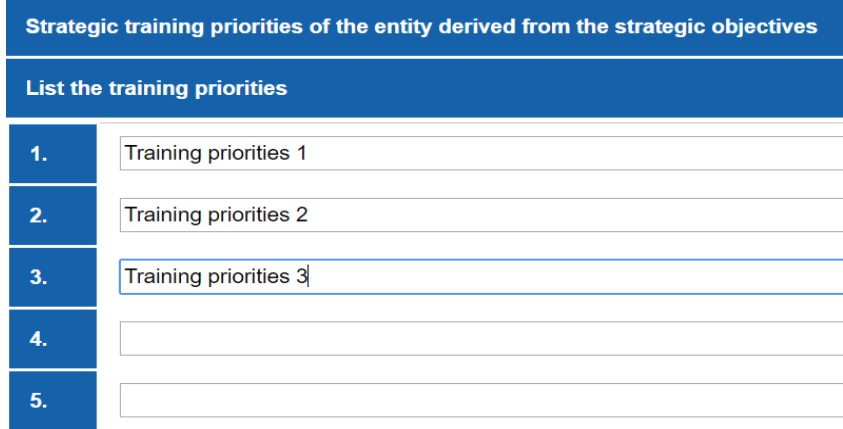
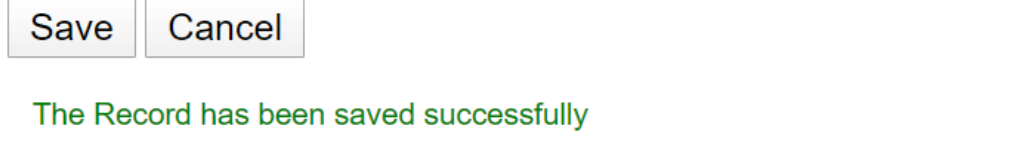

### 7.1.7 Form E1: Strategic Objectives

This form is compulsory, except for small and medium private companies.

Steps	Action	Screenshot										
<b>1</b>	You will be prompted to complete the form first before proceeding to the next form - Form E2: List the Training Priorities											
<b>2</b>	Complete the form by listing the strategic objectives	<div style="background-color: #0056b3; color: white; padding: 5px;"><b>Strategic objectives described in the entity's strategic business plan</b></div> <div style="background-color: #0056b3; color: white; padding: 5px;"><b>List the strategic objectives</b></div> <div style="margin-top: 10px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%; background-color: #0056b3; color: white; text-align: center; padding: 5px;"><b>1.</b></td> <td style="border: 1px solid #ccc; padding: 5px;">Strategic objectives 1</td> </tr> <tr> <td style="background-color: #0056b3; color: white; text-align: center; padding: 5px;"><b>2.</b></td> <td style="border: 1px solid #ccc; padding: 5px;">Strategic objectives 2</td> </tr> <tr> <td style="background-color: #0056b3; color: white; text-align: center; padding: 5px;"><b>3.</b></td> <td style="border: 1px solid #ccc; padding: 5px;">Strategic objectives 3</td> </tr> <tr> <td style="background-color: #0056b3; color: white; text-align: center; padding: 5px;"><b>4.</b></td> <td style="border: 1px solid #ccc; padding: 5px;"> </td> </tr> <tr> <td style="background-color: #0056b3; color: white; text-align: center; padding: 5px;"><b>5.</b></td> <td style="border: 1px solid #ccc; padding: 5px;"> </td> </tr> </table> </div>	<b>1.</b>	Strategic objectives 1	<b>2.</b>	Strategic objectives 2	<b>3.</b>	Strategic objectives 3	<b>4.</b>		<b>5.</b>	
<b>1.</b>	Strategic objectives 1											
<b>2.</b>	Strategic objectives 2											
<b>3.</b>	Strategic objectives 3											
<b>4.</b>												
<b>5.</b>												
<b>3</b>	Click the Save button to save your records successfully.	<div style="text-align: center; margin-bottom: 10px;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </div> <p style="color: green; text-align: center; font-weight: bold;">The Record has been saved successfully</p>										
<b>4</b>	Click the Next Form button to proceed to the next form.	<div style="text-align: center; border: 1px solid #ccc; padding: 10px; width: fit-content; margin: auto;"> <b>Next Form</b> </div>										

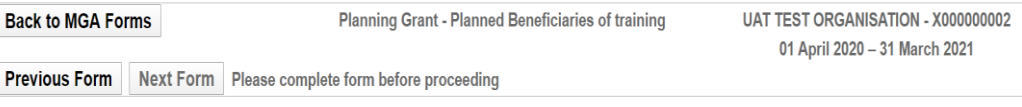
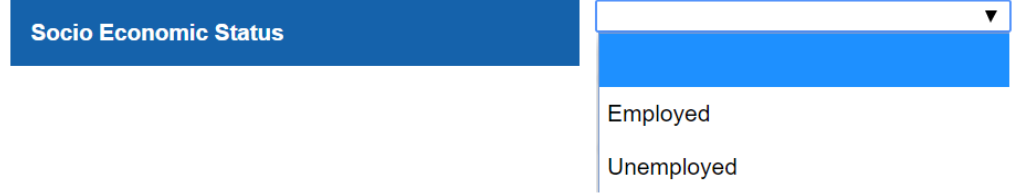

### 7.1.8 Form E2: List the Training Priorities

This form is compulsory for both Public and Private entities, and all organisation sizes.

Steps	Action	Screenshot
1	You will be prompted to complete the form first before proceeding to the next form - Form E3: Planned Beneficiaries of training	
2	Complete the form by listing the training priorities	
3	Click the Save button to save your records successfully.	
4	Click the Next Form button to proceed to the next form.	

### 7.1.9 Form E3: Planned Beneficiaries of training

This form is compulsory for both Public and Private entities, and all organisation sizes.

Steps	Action	Screenshot
1	You will be prompted to complete the form first before proceeding to the next form - Form E4: Planned Adult Education and Training	
2	Select the Socio-economic status value from the dropdown field	
3	Click on the magnifying glass icon to search for an OFO Occupation	

**4** You may use one of the search criteria to search for the OFO Occupation:  
 - OFO Code  
 - OFO Description  
**OR**  
 You may click on the Search button and the system will return all the latest OFO Occupations.  
 Once you have identified the correct OFO Occupation, click on the record; the record will be highlighted, and lastly click on the Select button.

**OFO Code**

**OFO Description**

OFO Code	OFO Description
2019-111101	Local or Provincial Government Legislator
2019-111102	Parliamentarian
2019-111201	Defence Force Senior Officer
2019-111202	General Manager Public Service
2019-111203	Local Authority Manager
2019-111204	Senior Government Official
2019-111205	Senior Police Officer
2019-111206	Ombudsperson
2019-111207	Senior Government Manager
2019-111301	Traditional Leader

**5** The system will adopt your selected records

**Occupational Category**

**Municipality**

**6** Click on the magnifying glass icon to search for Municipality should you wish to update the record

**7** Select the Type of Intervention value from the dropdown field

**Type Of Intervention**

▼

Certificate of attendance

Short Course

Skills Programme

**8** Populate the Name of Intervention field

**Name of Intervention**

**9** Populate only numeric values on each "Gender, population, disability status, and age group" field

African			Coloured			Indian/Asian			White			Age Group		
M	F	D	M	F	D	M	F	D	M	F	D	< 35	35 - 55	> 55
10	0	5	0	10	7	10	0	0	0	20	0	17	33	0

**10** Click on the Add button to save the records

OFO Major Group	OFO Occupation	Socio Economic Status	Municipality	Type Of Learning Programme	Name Of Intervention	African Male	African Female	African Disabled	Coloured Male	Coloured Female	Coloured Disabled	Indian/Asian Male	Indian/Asian Female	Indian/Asian Disabled	White Male	White Female	White Disabled	Total Male	Total Female	Total Disabled	Age Group - Less than 35	Age Group - 35 to 55	Age Group - Greater than 55
MANAGERS	2019-111202 - General Manager Public Service	Employed	Tshwane Metro	Certificate of attendance	Name of Intervention	10	0	5	0	10	7	10	0	0	0	20	0	20	30	12	17	33	0
Sub Total						10	0	5	0	10	7	10	0	0	0	20	0	20	30	12	17	33	0
Grand Total						50																	

<p><b>8</b></p> <p>The Bulk Import functionality may be used to load data in bulks on an excel spreadsheet.</p> <p>Once the Bulk Import button is clicked, a 'Download Excel Template' hyperlink will be available to generate the excel spreadsheet; and you may save it on your PC to complete it offline.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <h3 style="text-align: center; background-color: #0056b3; color: white; margin: 0;">Bulk Import</h3> <div style="background-color: #0056b3; color: white; text-align: center; padding: 5px; margin-top: 10px;"><b>IMPORT EXCEL DATA</b></div> <p style="margin-top: 5px;"><a href="#">Download Excel Template</a></p> <p>Upload file to Import</p> <div style="border: 1px solid #ccc; padding: 2px; margin: 5px 0;">Choose file No file chosen</div> <div style="display: flex; justify-content: center; gap: 20px; margin-top: 10px;"> <span>Import</span> <span>Cancel</span> </div> </div>																																				
<p><b>9</b></p> <p>You may edit over the existing records – they're available for your ease of reference.</p> <p>Leave the cells on Zero "0" if there is nothing to report.</p>																																					
<p><b>10</b></p> <p>To upload the completed excel template you must return to the Form and select the Bulk Import button.</p> <p>Click on the Choose file button to upload the template.</p> <p>Wait for the upload to highlight in green, and then select Import</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <div style="background-color: #0056b3; color: white; text-align: center; padding: 5px; margin-bottom: 10px;"><b>IMPORT EXCEL DATA</b></div> <p style="margin-bottom: 5px;"><a href="#">Download Excel Template</a></p> <p>Upload file to Import</p> <div style="border: 1px solid #ccc; padding: 2px; margin: 5px 0;">Choose file <span style="background-color: #00ff00;">2020_Beneficiaries_P...ed_Training_V1.xlsx</span></div> <div style="display: flex; justify-content: center; gap: 20px; margin-top: 10px;"> <span>Import</span> <span>Cancel</span> </div> </div>																																				
<p><b>11</b></p> <p>Ensure that the template is completed correctly, if not, the system will reject the uploaded template and return an exception report.</p> <p>Click on the hyperlink to download the exception report and read the Error Description to identify what needs to be rectified.</p>	<table border="1" style="width: 100%; text-align: center; border-collapse: collapse;"> <thead> <tr style="background-color: #0056b3; color: white;"> <th colspan="3">African</th> <th colspan="3">Coloured</th> <th colspan="3">Indian/Asian</th> <th colspan="3">White</th> </tr> <tr style="background-color: #0056b3; color: white;"> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> </tr> </thead> <tbody> <tr> <td>0</td><td>0</td><td>0</td> <td>0</td><td>0</td><td>0</td> <td>0</td><td>0</td><td>0</td> <td>0</td><td>0</td><td>0</td> </tr> </tbody> </table> <p style="margin-top: 10px;"> <span>Add</span> <span style="margin-left: 20px;">Bulk Import</span> <span style="margin-left: 20px;"><a href="#">Click here to download Bulk Import success and exception report</a></span> </p>	African			Coloured			Indian/Asian			White			M	F	D	M	F	D	M	F	D	M	F	D	0	0	0	0	0	0	0	0	0	0	0	0
African			Coloured			Indian/Asian			White																												
M	F	D	M	F	D	M	F	D	M	F	D																										
0	0	0	0	0	0	0	0	0	0	0	0																										

S2 Numeric Fields contains Alphanumerical values; OFO Occupation does not exist

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
1	Municipal	AfricanMa	AfricanFer	AfricanDis	ColouredM	ColouredF	ColouredD	IndianMal	IndianFer	IndianDisa	WhiteMal	WhiteFem	WhiteDisa	Age - Less	Age - 35 to	Age - Grea	ImportSta	ErrorDescription							
2	Beaufort V	1	0	0	0	0	0	0			0	0	0	0	0	1	0	Error on r	Numeric Fields contains Alphanumerical values; OFO Occupation does not exist						
3	Greater Tz	0	1	0	0	0	0	0	1	1	0	0	0	0	0	2	0	Error on r	OFO Occupation does not exist						
4	Mossel Ba	0	1	0	0	0	0	0	1	1	0	0	0	0	0	2	0	Error on r	OFO Occupation does not exist						

**12** Only when the record is saved successfully the Next Form button will be active.

**Next Form**



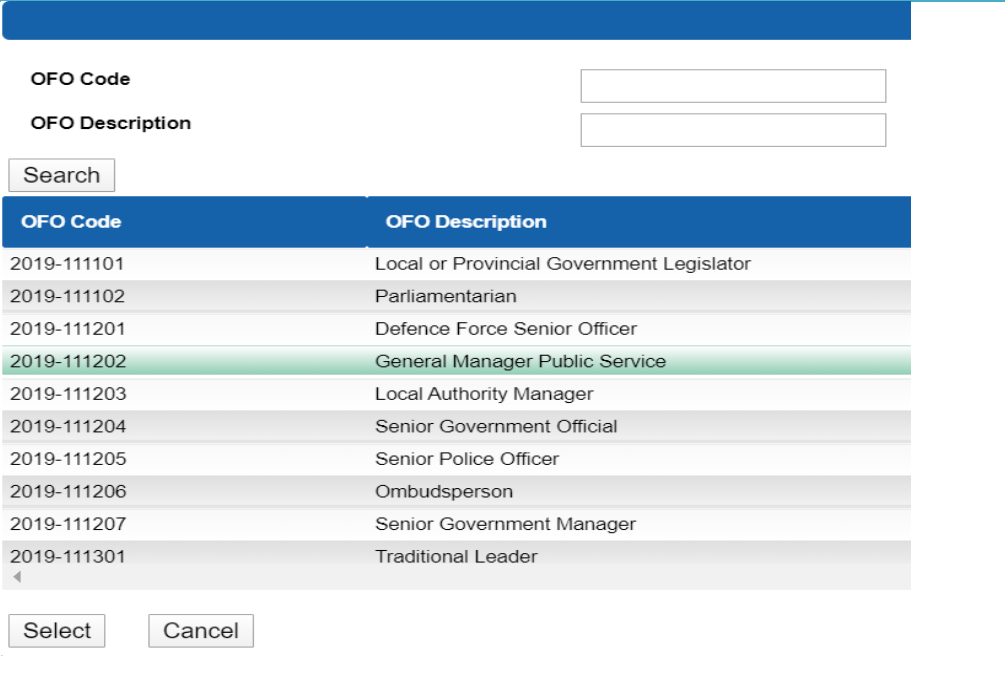


### 7.1.10 Form E4: Planned Adult Education and Training

This form is compulsory except for private companies.

Steps	Action	Screenshot
1	You will be prompted to complete the form first before proceeding to the next form - Form E4: Planned Adult Education and Training	
2	Should there be nothing to report on this form tick the 'Nothing to Report' checkbox, and click Save	
3	First select the record you want to edit, then select the Edit button to update the form	
4	Populate the numeric values and select the Update button to save the records.	
5	Only when the record is saved successfully the Next Form button will be active.	<p style="text-align: center;"><b>Next Form</b></p>

### 7.1.11 Form F: Planned Beneficiaries of Pivotal Training

This form requires Learning Programmes which are Professional, Vocational, Technical and Academic. E.g. NQF aligned or unit standard-based qualification. E.g. Artisan. It is optional for Companies with less than 50 employees and Compulsory for Companies with more than 50 employees.

Steps	Action	Screenshot
1	Select the Socio-economic status value from the dropdown field	
2	Click on the magnifying glass icon to search for the Occupation Category	
3	<p>You may use one of the search criteria to search for the OFO Occupation:</p> <ul style="list-style-type: none"> <li>- OFO Code</li> <li>- OFO Description</li> </ul> <p><b>OR</b></p> <p>You may click on the Search button and the system will return all the latest OFO Occupations.</p> <p>Once you have identified the correct OFO Occupation, click on the record; the record will be highlighted, and lastly click on the Select button.</p>	
4	The system will adopt your selected records	
5	Click on the magnifying glass icon to search for Municipality should you wish to update the record	



<b>6</b>	Select the Type of Pivotal Programme value from the dropdown field	<b>Type Of Pivotal Programme</b>	<div style="border: 1px solid black; padding: 5px;"> <div style="background-color: #0056b3; color: white; padding: 2px;">▼</div> <div style="background-color: #0056b3; height: 15px; margin-top: 2px;"></div> <div style="padding: 2px;">Artisan</div> <div style="padding: 2px;">Bursaries</div> <div style="padding: 2px;">Learnerships</div> <div style="padding: 2px;">Skills programmes</div> <div style="padding: 2px;">Work Integrated Learning / Internships</div> </div>
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<b>7</b>	Populate the Name of Pivotal Programme Intervention field	<b>Name of Pivotal Programme Intervention</b>	<div style="border: 1px solid black; padding: 5px;"> Name of Pivotal Programme Intervention </div>
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<b>8</b>	Select the NQF value from the dropdown field	<b>NQF Level</b>	<div style="border: 1px solid black; padding: 5px;"> <div style="background-color: #0056b3; color: white; padding: 2px;">▼</div> <div style="background-color: #0056b3; height: 15px; margin-top: 2px;"></div> <div style="padding: 2px;">Below Level 01</div> <div style="padding: 2px;">Level 01</div> <div style="padding: 2px;">Level 02</div> <div style="padding: 2px;">Level 03</div> </div>
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<b>9</b>	Populate only numeric values on each "Gender, population, disability status, and age group" field	African			Coloured			Indian/Asian			White			Age Group		
		M	F	D	M	F	D	M	F	D	M	F	D	< 35	35 - 55	> 55
		10	0	5	0	10	7	10	0	0	0	20	0	17	33	0

<b>10</b>	Click on the Add button to save the records	<b>Add</b>	
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OFO Major Group	OFO Occupation	Socio Economic Status	Municipality	Type Of Learning Programme	Name Of Intervention	African Male	African Female	African Disabled	Coloured Male	Coloured Female	Coloured Disabled	Indian/Asian Male	Indian/Asian Female	Indian/Asian Disabled	White Male	White Female	White Disabled	Total Male	Total Female	Total Disabled	Age Group - Less than 35	Age Group - 35 to 55	Age Group - Greater than 55	
MANAGERS	2019-111202 - General Manager Public Service	Employed	Tshwane Metro	Certificate of attendance	Name of Intervention	10	0	5	0	10	7	10	0	0	0	20	0	20	30	12	17	33	0	
Sub Total						10	0	5	0	10	7	10	0	0	0	20	0	20	30	12	17	33	0	
Grand Total																					50	50		

<b>11</b>	<p>The Bulk Import functionality may be used to load data in bulks on an excel spreadsheet.</p> <p>Once the Bulk Import button is clicked, a 'Download Excel Template' hyperlink will be available to generate the excel spreadsheet; and you may save it on your PC to complete it offline.</p>	<b>Bulk Import</b>	<div style="background-color: #0056b3; color: white; padding: 5px; text-align: right;"><b>IMPORT EXCEL DATA</b></div> <div style="padding: 5px;"> <a href="#" style="color: #0056b3; text-decoration: underline;">Download Excel Template</a>  Upload file to Import  <input type="button" value="Choose file"/> No file chosen </div> <div style="padding: 5px; margin-top: 10px;"> <input type="button" value="Import"/> <input type="button" value="Cancel"/> </div>
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**12** You may edit over the existing records – they're available for your ease of reference.  
  
Leave the cells on Zero "0" if there is nothing to report.

	A	B	C	D	E
2	Socio Economic Status	OFO Occupation	Municipality	Type Of Intervention	Name Of Intervention
4	Unemployed	2019-111101 - Local or Provincial Government Legislator	Albert Luthuli	Skills Programme	SP - 3
5	Employed	2019-111205 - Senior Police Officer	Amahlathi	Certificate of attendance	COA - 2
6	Unemployed	2019-111102 - Parliamentarian	Mkhomazi Wilderness Area	Short Course	SC - 1

**10** To upload the completed excel template you must return to the Form and select the Bulk Import button.  
  
Click on the Choose file button to upload the template.  
  
Wait for the upload to highlight in green, and then select Import

**IMPORT EXCEL DATA**

[Download Excel Template](#)  
Upload file to Import

Choose file WSPATR Bulk Import\_ 2482986261692.xlsx

**11** Ensure that the template is completed correctly, if not, the system will reject the uploaded template and return an exception report.  
  
Click on the hyperlink to download the exception report and read the Error Description to identify what needs to be rectified.

African			Coloured			Indian/Asian			White		
M	F	D	M	F	D	M	F	D	M	F	D
0	0	0	0	0	0	0	0	0	0	0	0

[Click here to download Bulk Import success and exception report](#)

S2 Numeric Fields contains Alphanumerical values; OFO Occupation does not exist




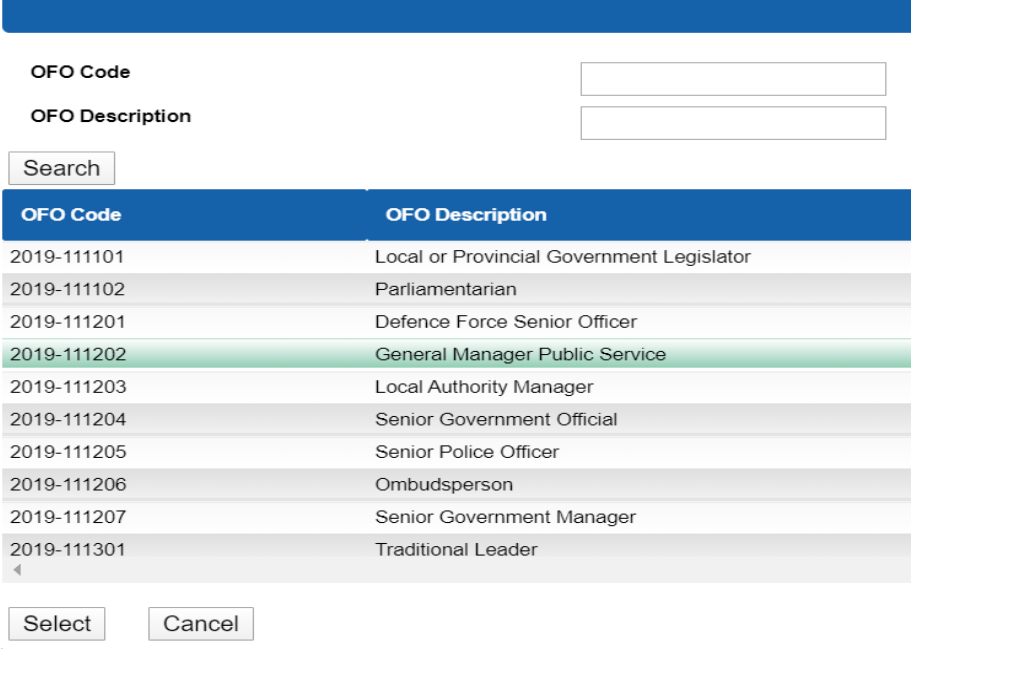


	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
1	Municipal	AfricanMa	AfricanFer	AfricanDis	ColouredN	ColouredF	ColouredC	IndianMal	IndianFer	IndianDisa	WhiteMal	WhiteFer	WhiteDisa	Age - Less	Age - 35 to	Age - Grea	ImportSta	ErrorDescription							
2	Beaufort V1	0	0	0	0	0	0	0			0	0	0	0	0	0	1	Error on r	Numeric Fields contains Alphanumerical values; OFO Occupation does not exist						
3	Greater Tz	0	1	0	0	0	0	0	1	1	0	0	0	0	0	0	2	Error on r	OFO Occupation does not exist						
4	Mossel Ba	0	1	0	0	0	0	0	1	1	0	0	0	0	0	0	2	Error on r	OFO Occupation does not exist						

**12** Only when the record is saved successfully the Next Form button will be active.

## 7.2 Implementation Grant

### 7.2.1 Form G1: Actual Training


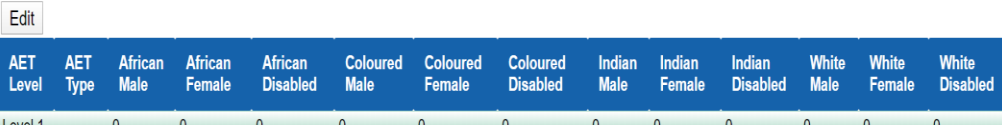
This form is compulsory for both Public and Private entities, and all organisation sizes; however, only if the previous Mandatory Grant forms were submitted.

Steps	Action	Screenshot
1	Click on the Select button to open the form	
2	Select the Socio-economic status value from the dropdown field	
3	Click on the magnifying glass icon to search for an OFO Occupation	
4	<p>You may use one of the search criteria to search for the OFO Occupation:</p> <ul style="list-style-type: none"> <li>- OFO Code</li> <li>- OFO Description</li> </ul> <p><b>OR</b></p> <p>You may click on the Search button and the system will return all the latest OFO Occupations.</p> <p>Once you have identified the correct OFO Occupation, click on the record; the record will be highlighted, and lastly click on the Select button.</p>	
5	The system will adopt your selected records	
6	Click on the magnifying glass icon to search for Municipality should you wish to update the record	

7	Select the Type of Intervention value from the dropdown field	<b>Type Of Intervention</b>	<input type="text"/> Certificate of attendance Short Course Skills Programme																																													
8	Populate the Name of Intervention field	<b>Name of Intervention</b>	<input type="text" value="Name of Intervention"/>																																													
9	Populate the Name of Institution field	<b>Name of Institution</b>	<input type="text" value="Name of Institution"/>																																													
10	Populate numeric values in the Completed field	<b>Completed</b>	<input type="text" value="2"/>																																													
11	Populate numeric values in the Not Completed field	<b>Not Completed</b>	<input type="text" value="5"/>																																													
12	This will be a required field if records are entered into the Not Completed field	<b>Reason For Non-Completion</b>	<input type="text" value="Reason For Non-Completion"/>																																													
13	Populate only numeric values on each "Gender, population, disability status, and age group" field	<table border="1"> <thead> <tr> <th colspan="3">African</th> <th colspan="3">Coloured</th> <th colspan="3">Indian/Asian</th> <th colspan="3">White</th> <th colspan="3">Age Group</th> </tr> <tr> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> <th>&lt; 35</th><th>35 - 55</th><th>&gt; 55</th> </tr> </thead> <tbody> <tr> <td>10</td><td>0</td><td>5</td> <td>0</td><td>10</td><td>7</td> <td>10</td><td>0</td><td>0</td> <td>0</td><td>20</td><td>0</td> <td>17</td><td>33</td><td>0</td> </tr> </tbody> </table>	African			Coloured			Indian/Asian			White			Age Group			M	F	D	M	F	D	M	F	D	M	F	D	< 35	35 - 55	> 55	10	0	5	0	10	7	10	0	0	0	20	0	17	33	0	
African			Coloured			Indian/Asian			White			Age Group																																				
M	F	D	M	F	D	M	F	D	M	F	D	< 35	35 - 55	> 55																																		
10	0	5	0	10	7	10	0	0	0	20	0	17	33	0																																		
14	Click on the Add button to save the records	<input type="button" value="Add"/>																																														
15	The Import previous year's data button may be used if there are no changes from the previous MG submissions	<input type="button" value="Import previous year's data"/>																																														

### 7.2.2 Form G2: Completed AET Programmes

This form is compulsory except for private companies.

Steps	Action	Screenshot																												
1	Should there be nothing to report on this form tick the 'Nothing to Report' checkbox, and click Save																													
2	First select the record you want to edit, then select the Edit button to update the form	 <table border="1"> <thead> <tr> <th>AET Level</th> <th>AET Type</th> <th>African Male</th> <th>African Female</th> <th>African Disabled</th> <th>Coloured Male</th> <th>Coloured Female</th> <th>Coloured Disabled</th> <th>Indian Male</th> <th>Indian Female</th> <th>Indian Disabled</th> <th>White Male</th> <th>White Female</th> <th>White Disabled</th> </tr> </thead> <tbody> <tr> <td>Level 1</td> <td></td> <td>0</td><td>0</td><td>0</td> <td>0</td><td>0</td><td>0</td> <td>0</td><td>0</td><td>0</td> <td>0</td><td>0</td><td>0</td> </tr> </tbody> </table>	AET Level	AET Type	African Male	African Female	African Disabled	Coloured Male	Coloured Female	Coloured Disabled	Indian Male	Indian Female	Indian Disabled	White Male	White Female	White Disabled	Level 1		0	0	0	0	0	0	0	0	0	0	0	0
AET Level	AET Type	African Male	African Female	African Disabled	Coloured Male	Coloured Female	Coloured Disabled	Indian Male	Indian Female	Indian Disabled	White Male	White Female	White Disabled																	
Level 1		0	0	0	0	0	0	0	0	0	0	0	0																	

<b>3</b>	Populate the numeric values and select the Update button to save the records.	<p>Click on relevant AET level to edit &amp; complete the info</p> <table border="1"> <tr> <td colspan="3">AET Level</td> <td colspan="9">Level 1</td> </tr> <tr> <td colspan="3">African</td> <td colspan="3">Coloured</td> <td colspan="3">Indian/Asian</td> <td colspan="3">White</td> </tr> <tr> <td>M</td><td>F</td><td>D</td> <td>M</td><td>F</td><td>D</td> <td>M</td><td>F</td><td>D</td> <td>M</td><td>F</td><td>D</td> </tr> <tr> <td>10</td><td>0</td><td>0</td> <td>10</td><td>0</td><td>0</td> <td>10</td><td>0</td><td>0</td> <td>0</td><td>20</td><td>0</td> </tr> <tr> <td colspan="12"> <input type="button" value="Update"/> <input type="button" value="Cancel"/> </td> </tr> </table>	AET Level			Level 1									African			Coloured			Indian/Asian			White			M	F	D	M	F	D	M	F	D	M	F	D	10	0	0	10	0	0	10	0	0	0	20	0	<input type="button" value="Update"/> <input type="button" value="Cancel"/>											
		AET Level			Level 1																																																									
African			Coloured			Indian/Asian			White																																																					
M	F	D	M	F	D	M	F	D	M	F	D																																																			
10	0	0	10	0	0	10	0	0	0	20	0																																																			
<input type="button" value="Update"/> <input type="button" value="Cancel"/>																																																														
<b>4</b>	Select the Next Form button to proceed to the next form	<input type="button" value="Next Form"/>																																																												




### 7.2.3 Form G3: Expenditure of Training Budget

This form is compulsory for both Public and Private entities, and all organisation sizes

Steps	Action	Screenshot									
<b>Input the expenditure of training budget on the first section of the form</b>											
<b>1</b>	Whichever Socio-Economic status value was selected in Form G1, the available Actual Cost (ZAR) field will open.	<table border="1"> <tr> <th>Type of Intervention Delivered</th> <th>Actual Cost (ZAR) – Employed</th> <th>Actual Cost (ZAR) – Unemployed</th> </tr> <tr> <td>Short Course</td> <td>50000.00</td> <td>0.00</td> </tr> <tr> <td><b>Total</b></td> <td><b>50000.00</b></td> <td><b>0.00</b></td> </tr> </table>	Type of Intervention Delivered	Actual Cost (ZAR) – Employed	Actual Cost (ZAR) – Unemployed	Short Course	50000.00	0.00	<b>Total</b>	<b>50000.00</b>	<b>0.00</b>
		Type of Intervention Delivered	Actual Cost (ZAR) – Employed	Actual Cost (ZAR) – Unemployed							
		Short Course	50000.00	0.00							
<b>Total</b>	<b>50000.00</b>	<b>0.00</b>									
<b>Input the expenditure of additional budget on the second section of the form</b>											
<b>1</b>	Populate the Source field	<table border="1"> <tr> <td><b>Source</b></td> <td>Source</td> </tr> </table>	<b>Source</b>	Source							
<b>Source</b>	Source										
<b>2</b>	Populate the Amount field in the specified format	<table border="1"> <tr> <td><b>Amount (ZAR)</b></td> <td>1500000.00</td> </tr> </table>	<b>Amount (ZAR)</b>	1500000.00							
<b>Amount (ZAR)</b>	1500000.00										
<b>3</b>	Populate the Project field	<table border="1"> <tr> <td><b>Project</b></td> <td>Project</td> </tr> </table>	<b>Project</b>	Project							
<b>Project</b>	Project										
<b>4</b>	The Grand Total field will auto-populate the amounts entered	<table border="1"> <tr> <td><b>Grand Total</b></td> <td>1550000.00</td> </tr> </table>	<b>Grand Total</b>	1550000.00							
<b>Grand Total</b>	1550000.00										
<b>5</b>	Click the save button	<input type="button" value="Save"/> <input type="button" value="Cancel"/> <p>The Record has been saved successfully</p>									
<b>6</b>	Select the Next Form button to proceed to the next form	<input type="button" value="Next Form"/>									



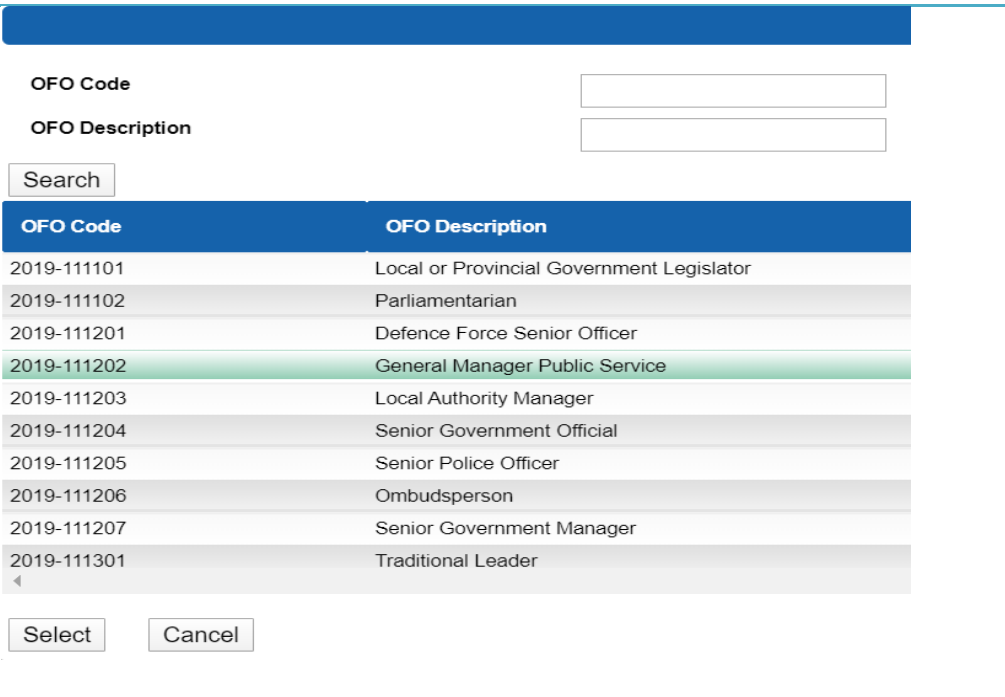
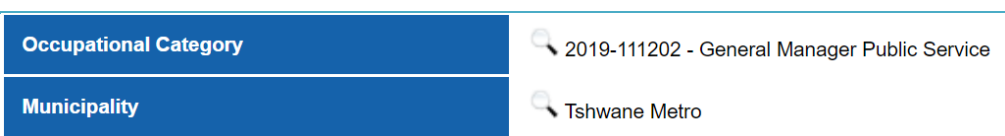
### 7.2.4 Form G4: Impact Assessment

This form is compulsory except for private companies.

Steps	Action	Screenshot
<b>Select the available checkboxes</b>		
	<p><b>Impact Assessment</b></p> <p>For what reasons did the organisation decide to undertake staff training? (Select all applicable options)</p>	<input type="checkbox"/> In response to legislation <input type="checkbox"/> To meet organisational human resource development policies and targets <input type="checkbox"/> To help the organisation resolve recognised problems <input type="checkbox"/> To help improve operation and functional efficiency <input type="checkbox"/> To increase revenue from current operations <input type="checkbox"/> To reduce business risk <input type="checkbox"/> To improve product/service quality <input type="checkbox"/> To adapt to evolving industry/technologies <input type="checkbox"/> To be seen following "good practice" <input type="checkbox"/> Other <input type="text"/>
<b>1</b>	When "Other" checkbox is selected, a reason must be provided.	 <p>Other reasons required when Other check box is selected.</p>
<b>2</b>	Click the save button	 <p>The Record has been saved successfully</p>
<b>3</b>	Select the Next Form button to proceed to the next form	

### 7.2.5 Form H1: Actual Pivotal Training

This form requires Learning Programmes which are professional, vocational, technical and academic. E.g. Formal qualification, Artisan. Optional for Companies less than 50 employees and Compulsory for Companies with more than 50 employees.

Steps	Action	Screenshot																						
1	Select the Socio-economic status value from the dropdown field	 <p><b>Socio Economic Status</b></p> <p>Employed</p> <p>Unemployed</p>																						
2	Click on the magnifying glass icon to search for the Occupation Category	 <p><b>Occupational Category</b></p>																						
3	<p>You may use one of the search criteria to search for the OFO Occupation:</p> <ul style="list-style-type: none"> <li>- OFO Code</li> <li>- OFO Description</li> </ul> <p><b>OR</b></p> <p>You may click on the Search button and the system will return all the latest OFO Occupations.</p> <p>Once you have identified the correct OFO Occupation, click on the record; the record will be highlighted, and lastly click on the Select button.</p>	 <p>OFO Code <input type="text"/></p> <p>OFO Description <input type="text"/></p> <p>Search</p> <table border="1"> <thead> <tr> <th>OFO Code</th> <th>OFO Description</th> </tr> </thead> <tbody> <tr> <td>2019-111101</td> <td>Local or Provincial Government Legislator</td> </tr> <tr> <td>2019-111102</td> <td>Parliamentarian</td> </tr> <tr> <td>2019-111201</td> <td>Defence Force Senior Officer</td> </tr> <tr style="background-color: #e0f2f1;"> <td>2019-111202</td> <td>General Manager Public Service</td> </tr> <tr> <td>2019-111203</td> <td>Local Authority Manager</td> </tr> <tr> <td>2019-111204</td> <td>Senior Government Official</td> </tr> <tr> <td>2019-111205</td> <td>Senior Police Officer</td> </tr> <tr> <td>2019-111206</td> <td>Ombudsperson</td> </tr> <tr> <td>2019-111207</td> <td>Senior Government Manager</td> </tr> <tr> <td>2019-111301</td> <td>Traditional Leader</td> </tr> </tbody> </table> <p>Select Cancel</p>	OFO Code	OFO Description	2019-111101	Local or Provincial Government Legislator	2019-111102	Parliamentarian	2019-111201	Defence Force Senior Officer	2019-111202	General Manager Public Service	2019-111203	Local Authority Manager	2019-111204	Senior Government Official	2019-111205	Senior Police Officer	2019-111206	Ombudsperson	2019-111207	Senior Government Manager	2019-111301	Traditional Leader
OFO Code	OFO Description																							
2019-111101	Local or Provincial Government Legislator																							
2019-111102	Parliamentarian																							
2019-111201	Defence Force Senior Officer																							
2019-111202	General Manager Public Service																							
2019-111203	Local Authority Manager																							
2019-111204	Senior Government Official																							
2019-111205	Senior Police Officer																							
2019-111206	Ombudsperson																							
2019-111207	Senior Government Manager																							
2019-111301	Traditional Leader																							
4	The system will adopt your selected records	 <p><b>Occupational Category</b> 2019-111202 - General Manager Public Service</p> <p><b>Municipality</b> Tshwane Metro</p>																						
5	Click on the magnifying glass icon to search for Municipality should you wish to update the record																							

6	Select the Type of Pivotal Programme Delivered value from the dropdown field	<div style="background-color: #0056b3; color: white; padding: 5px;">Type of Pivotal Programme Delivered</div>	<div style="background-color: #0056b3; color: white; padding: 5px; text-align: right;">▼</div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">             Artisan              Bursaries              Learnerships              Skills programmes              Work Integrated Learning / Internships         </div>																																																										
7	Populate the Name of Pivotal Programme Delivered field	<div style="background-color: #0056b3; color: white; padding: 5px;">Name of Pivotal Programme Delivered</div>	<input style="width: 100%;" type="text" value="Pivotal Programme Delivered"/>																																																										
8	Populate the Name of Institution field	<div style="background-color: #0056b3; color: white; padding: 5px;">Name of Institution</div>	<input style="width: 100%;" type="text" value="Name of Institution"/>																																																										
9	Indicate how many individuals have completed and/or not completed their training. If the Not Completed field is populated, the reason for non-completion must be provided.	<div style="background-color: #0056b3; color: white; padding: 5px;">Completed</div> <div style="background-color: #0056b3; color: white; padding: 5px; margin-top: 5px;">Not Completed</div> <div style="background-color: #0056b3; color: white; padding: 5px; margin-top: 5px;">Reason For Non-Completion</div>	<input style="width: 100%;" type="text"/> <input style="width: 100%;" type="text" value="5"/> <input style="width: 100%;" type="text" value="Reason For Non-Completion"/>																																																										
10	Populate only numeric values on each "Gender, population, disability status, and age group" field	<table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr style="background-color: #0056b3; color: white;"> <th colspan="3">African</th> <th colspan="3">Coloured</th> <th colspan="3">Indian/Asian</th> <th colspan="3">White</th> <th colspan="3">Age Group</th> </tr> <tr style="background-color: #0056b3; color: white;"> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> <th>&lt; 35</th><th>35 - 55</th><th>&gt; 55</th> </tr> </thead> <tbody> <tr> <td>10</td><td>0</td><td>5</td> <td>0</td><td>10</td><td>7</td> <td>10</td><td>0</td><td>0</td> <td>0</td><td>20</td><td>0</td> <td>17</td><td>33</td><td>0</td> </tr> </tbody> </table>															African			Coloured			Indian/Asian			White			Age Group			M	F	D	M	F	D	M	F	D	M	F	D	< 35	35 - 55	> 55	10	0	5	0	10	7	10	0	0	0	20	0	17	33	0
African			Coloured			Indian/Asian			White			Age Group																																																	
M	F	D	M	F	D	M	F	D	M	F	D	< 35	35 - 55	> 55																																															
10	0	5	0	10	7	10	0	0	0	20	0	17	33	0																																															
11	Click on the Add button to save the records	<div style="background-color: #ccc; padding: 10px; display: inline-block; border: 1px solid #0056b3;">Add</div>																																																											

OFO Major Group	OFO Occupation	Socio Economic Status	Municipality	Type Of Learning Programme	Name Of Intervention	African Male	African Female	African Disabled	Coloured Male	Coloured Female	Coloured Disabled	Indian/Asian Male	Indian/Asian Female	Indian/Asian Disabled	White Male	White Female	White Disabled	Total Male	Total Female	Total Disabled	Age Group - Less than 35	Age Group - 35 to 55	Age Group - Greater than 55		
MANAGERS	2019-111202 - General Manager Public Service	Employed	Tshwane Metro	Certificate of attendance	Name of Intervention	10	0	5	0	10	7	10	0	0	0	20	0	0	20	30	12	17	33	0	
Sub Total						10	0	5	0	10	7	10	0	0	0	20	0	0	20	30	12	17	33	0	
Grand Total																					50	50			

12	<p>The Bulk Import functionality may be used to load data in bulks on an excel spreadsheet.</p> <p>Once the Bulk Import button is clicked, a 'Download Excel Template' hyperlink will be available to generate the excel spreadsheet; and you may save it on your PC to complete it offline.</p>	<div style="background-color: #ccc; padding: 10px; display: inline-block; border: 1px solid #0056b3;">Bulk Import</div> <div style="background-color: #0056b3; color: white; padding: 5px; text-align: center; margin-top: 10px;"> <b>IMPORT EXCEL DATA</b> </div> <div style="margin-top: 5px;"> <a href="#" style="color: #0056b3; text-decoration: underline;">Download Excel Template</a>              Upload file to Import  <input style="border: 1px solid #ccc;" type="text" value="Choose file"/> No file chosen         </div> <div style="margin-top: 10px;"> <input style="width: 40px;" type="button" value="Import"/> <input style="width: 40px;" type="button" value="Cancel"/> </div>
----	--	---



**13** You may edit over the existing records – they're available for your ease of reference.  
  
Leave the cells on Zero "0" if there is nothing to report.

	A	B	C	D	E
2	Socio Economic Status	OFO Occupation	Municipality	Type Of Intervention	Name Of Intervention
4	Unemployed	2019-111101 - Local or Provincial Government Legislator	Albert Luthuli	Skills Programme	SP - 3
5	Employed	2019-111205 - Senior Police Officer	Amahlathi	Certificate of attendance	COA - 2
6	Unemployed	2019-111102 - Parliamentarian	Mkhomazi Wilderness Area	Short Course	SC - 1

**14** To upload the completed excel template you must return to the Form and select the Bulk Import button.  
  
Click on the Choose file button to upload the template.  
  
Wait for the upload to highlight in green, and then select Import

IMPORT EXCEL DATA

[Download Excel Template](#)  
Upload file to Import

Choose file WSPATR Bulk Import\_...\_2482986261692.xlsx

**15** Ensure that the template is completed correctly, if not, the system will reject the uploaded template and return an exception report.  
  
Click on the hyperlink to download the exception report and read the Error Description to identify what needs to be rectified.

African			Coloured			Indian/Asian			White		
M	F	D	M	F	D	M	F	D	M	F	D
0	0	0	0	0	0	0	0	0	0	0	0

[Click here to download Bulk Import success and exception report](#)

S2 Numeric Fields contains Alphanumerical values; OFO Occupation does not exist

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
1	Municipal	AfricanMa	AfricanFer	AfricanDis	ColouredA	ColouredF	ColouredC	IndianMal	IndianFer	IndianDis	WhiteMal	WhiteFem	WhiteDis	Age - Less	Age - 35 to	Age - Grea	ImportSta	ErrorDescription							
2	Beaufort V1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1		Error on r	Numeric Fields contains Alphanumerical values; OFO Occupation does not exist						
3	Greater Tz	0	1	0	0	0	0	0	1	1	0	0	0	0	0	2		Error on r	OFO Occupation does not exist						
4	Mossel Ba	0	1	0	0	0	0	0	1	1	0	0	0	0	0	2		Error on r	OFO Occupation does not exist						

**16** Only when the record is saved successfully the Next Form button will be active.

Next Form

### 7.2.6 Form H2: Expenditure of Pivotal Training

This form is compulsory for both Public and Private entities, and all organisation sizes

Steps	Action	Screenshot		
<b>Input the expenditure of pivotal training budget on the first section of the form</b>				
<b>1</b>	Whichever Socio-Economic status value that was selected in Form H1, the available Actual Cost (ZAR) field will open.	<b>Type of Intervention Delivered</b>	<b>Actual Cost (ZAR) – Employed</b>	<b>Actual Cost (ZAR) – Unemployed</b>
		<b>Short Course</b>	<input type="text" value="50000.00"/>	<input type="text" value="0.00"/>
		<b>Total</b>	50000.00	0.00
<b>Input the expenditure of additional budget on the second section of the form</b>				
<b>1</b>	Populate the Source field	<b>Source</b>	<input type="text" value="Source"/>	
<b>2</b>	Populate the Amount field in the specified format	<b>Amount (ZAR)</b>	<input type="text" value="1500000.00"/>	
<b>3</b>	Populate the Project field	<b>Project</b>	<input type="text" value="Project"/>	
<b>4</b>	The Grand Total field will auto-populate the amounts entered	<b>Grand Total</b>	1550000.00	
<b>5</b>	Click the save button	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	<p>The Record has been saved successfully</p>
<b>6</b>	Select the Next Form button to proceed to the next form	<input type="button" value="Next Form"/>		

### 7.2.7 Form I: Variance report

This form will display the comparison of individuals planned for training vs. individuals that have been trained per intervention for the financial year.

If there is a variance between the two, a variance reason must be selected from the dropdown field.



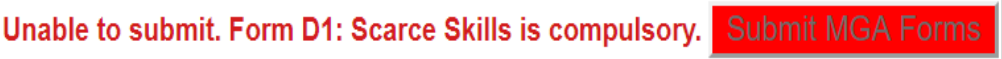
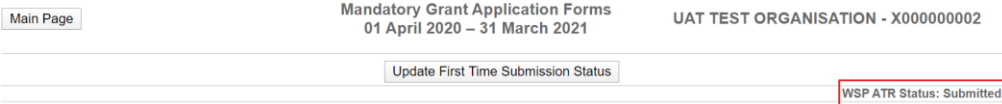
**Screenshot**

Training Intervention Forms	2019 Total Planned	2019 Total Trained	Total Variance	Variance Reason
Skills Programme	0	0	0	
Certificate of Attendance	0	0	0	
Short Course	0	40	0	
Work Integrated Learning / Internship	0	0	0	
Artisan	0	0	0	
Bursary	0	0	0	
Learnership	0	0	0	

The Record has been saved successfully


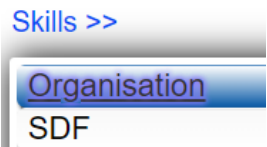
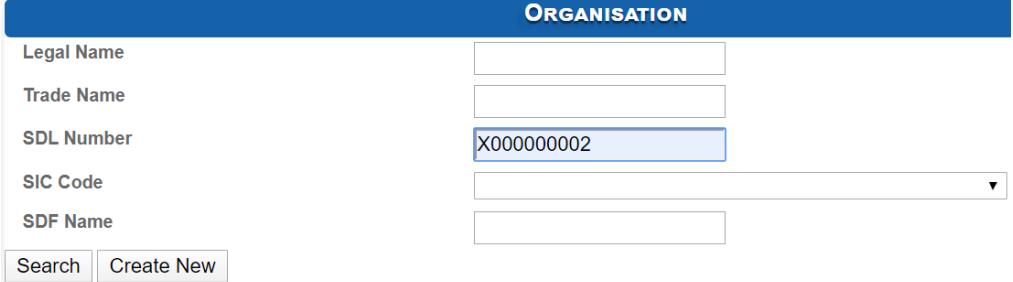
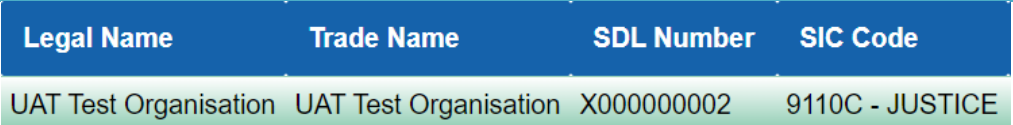

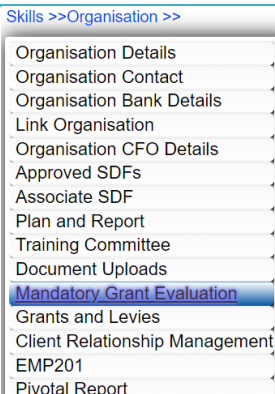
## 8 Submitting Mandatory Grant Forms

In this section the SDF will submit the MG forms on the Mandatory Grant Application Forms main page.

Steps	Action	Screenshot
1	When the last form is completed on either the Planning Grant or Implementation Grant section, the SDF may select Back to MGA Forms button	
2	Select the Submit MGA Forms button	
3	The system will check for compulsory forms whether they were completed or not	
4	The WSP/ATR status will be displayed	
5	The SDF will receive the Acknowledgment of WSP Submission email	

## 9 Mandatory Grant Evaluation

In this section allows SASSETA internal users to evaluate the company's submitted Mandatory Grant Forms.

Steps	Action	Screenshot
1	Click on the Skills main tab	
2	Select Organisation from the sub-tab	
3	Search for an Organisation using one of the search criteria	
4	Click on the record that is returned and it will be highlighted.	
5	Click on the Action icon to open the company details	
6	Select <b>Mandatory Grant Evaluation</b> from the sub-tabs	

<b>7</b>	Select the Financial Year that must be evaluated	<b>MANDATORY GRANT EVALUATION - UAT TEST ORGANISATION (X000000002)</b> Please select a Financial Year. <div style="border: 1px solid black; padding: 5px;"> <input type="text" value="01 April 2020 – 31 March 2021"/>  <input style="background-color: #e0f0ff;" type="text" value="01 April 2019 – 31 March 2020"/>  <input type="text" value="01 April 2018 – 31 March 2019"/>  <input type="text" value="01 April 2017 – 31 March 2018"/>  <input type="text" value="01 April 2016 – 31 March 2017"/>  <input type="text" value="01 April 2015 – 31 March 2016"/>  <input type="text" value="01 April 2014 – 31 March 2015"/>  <input type="text" value="01 April 2013 – 31 March 2014"/>  <input type="text" value="01 April 2012 – 31 March 2013"/>  <input type="text" value="01 April 2011 – 31 March 2012"/> </div>																																							
<b>8</b>	Indicate whether the company is Levy or - Non-Levy Paying on the Radio button.  Input comments in the Comments free-text field	<table border="1"> <tr> <td>Organisation Name</td> <td>UAT Test Organisation</td> <td>Organisation SDL Number</td> <td>X000000002</td> </tr> </table>	Organisation Name	UAT Test Organisation	Organisation SDL Number	X000000002	<table border="1"> <tr> <td>WSP Year</td> <td>01 April 2020 – 31 March 2021</td> <td>Grant Status</td> <td>Submitted</td> </tr> </table>	WSP Year	01 April 2020 – 31 March 2021	Grant Status	Submitted	<table border="1"> <tr> <td>Grant Submission Date</td> <td>14/01/2020</td> <td>Grant Submitted By</td> <td>Ntsitsana Kiti</td> </tr> </table>	Grant Submission Date	14/01/2020	Grant Submitted By	Ntsitsana Kiti	<table border="1"> <tr> <td>Levy / Non-Levy Paying</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> <td>Comments:</td> <td><input style="background-color: #ffff00;" type="text" value="Input Comments"/></td> </tr> </table>	Levy / Non-Levy Paying	<input type="radio"/> Yes <input checked="" type="radio"/> No	Comments:	<input style="background-color: #ffff00;" type="text" value="Input Comments"/>																				
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<b>9</b>	Complete the Evaluation checklist for uploaded documents.  You may click on the hyperlink of each uploaded document to view the contents of the document.	<table border="1"> <thead> <tr> <th colspan="4">Evaluation Checklist: Uploaded Documents WSP 20/21 - ATR 19/20</th> </tr> <tr> <th>Document Name</th> <th>Document Uploaded</th> <th>All In Order?</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>Company Name Change Information</td> <td>No</td> <td><input type="radio"/> Yes <input type="radio"/> No</td> <td><input type="text"/></td> </tr> <tr> <td><a href="#">Bank Confirmation Letter (Stamped By Bank)</a></td> <td>Yes</td> <td><input type="radio"/> Yes <input type="radio"/> No</td> <td><input type="text"/></td> </tr> <tr> <td><a href="#">Authorisation Page</a></td> <td>Yes</td> <td><input type="radio"/> Yes <input type="radio"/> No</td> <td><input type="text"/></td> </tr> <tr> <td><a href="#">Authorisation Page</a></td> <td>Yes</td> <td><input type="radio"/> Yes <input type="radio"/> No</td> <td><input type="text"/></td> </tr> <tr> <td>Training Committee minutes</td> <td>No</td> <td><input type="radio"/> Yes <input type="radio"/> No</td> <td><input type="text"/></td> </tr> <tr> <td><a href="#">Bank Confirmation Letter</a></td> <td>Yes</td> <td><input type="radio"/> Yes <input type="radio"/> No</td> <td><input type="text"/></td> </tr> <tr> <td>Proof of training</td> <td>No</td> <td><input type="radio"/> Yes <input type="radio"/> No</td> <td><input type="text"/></td> </tr> </tbody> </table>				Evaluation Checklist: Uploaded Documents WSP 20/21 - ATR 19/20				Document Name	Document Uploaded	All In Order?	Comments	Company Name Change Information	No	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>	<a href="#">Bank Confirmation Letter (Stamped By Bank)</a>	Yes	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>	<a href="#">Authorisation Page</a>	Yes	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>	<a href="#">Authorisation Page</a>	Yes	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>	Training Committee minutes	No	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>	<a href="#">Bank Confirmation Letter</a>	Yes	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>	Proof of training	No	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
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<b>10</b> Complete the Evaluation checklist for ATR (Training Completed in year 2019)  You may click on the hyperlink of each form completed to view the contents of the forms.	Evaluation Checklist - WSP/ATR 2021 ATR (Training Completed in year 2019)			
	Form Name	Form Completed?	All In Order?	Comments
	<a href="#">G1 Actual Training</a>	Yes	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
	<a href="#">G2 Completed AET Programmes</a>	Yes	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
	<a href="#">G3 Expenditure of Training Budget</a>	Yes	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
	<a href="#">G4 Impact Assessment</a>	Yes	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
	<a href="#">H1 Actual Pivotal Training</a>	Yes	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
<a href="#">H2 Expenditure of Pivotal Training</a>	Yes	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>	

<b>11</b> Complete the Evaluation checklist for WSP (Work Skills Planning in year 2020)  You may click on the hyperlink of each form completed to view the contents of the forms.	
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**Status of WSP/ATR Submission 2020/2021 – Initial Evaluation**

<b>12</b> Dashboard status under WSP Plan and report must change to <b>Query</b> . Query e-mail to be sent to the designated recipients. All the information per <b>form and document</b> under the description for outstanding information must display on the letter.  At the bottom of the letter, the overall comments under the initial evaluation must pull to the letter.  The system is then to <b>open the document upload tab</b> only for 10 working days from the date of status change and then close.  The <b>query due date</b> must then update on the dashboard																				
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #0056b3; color: white;"> <th>Skills Year</th> <th>Form Type</th> <th>Grant Status</th> <th>Due Date</th> <th>Status Date</th> <th>Submission Date</th> <th>Approved Date</th> <th>Interim Approval Date</th> <th>Rejected Date</th> <th>Query Due Date</th> </tr> </thead> <tbody> <tr> <td>01 April 2020 – 31 March 2021</td> <td>Large</td> <td>Submitted</td> <td>30/04/2020</td> <td>14/01/2020</td> <td>14/01/2020</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Skills Year	Form Type	Grant Status	Due Date	Status Date	Submission Date	Approved Date	Interim Approval Date	Rejected Date	Query Due Date	01 April 2020 – 31 March 2021	Large	Submitted	30/04/2020	14/01/2020	14/01/2020				
Skills Year	Form Type	Grant Status	Due Date	Status Date	Submission Date	Approved Date	Interim Approval Date	Rejected Date	Query Due Date											
01 April 2020 – 31 March 2021	Large	Submitted	30/04/2020	14/01/2020	14/01/2020															
When the submission is then again done – the query submission date must update. The submit button will be active.																				

**Status of WSP/ATR Submission 2020/2021 – Final Evaluation**

<b>13</b> <b>i. Final evaluation: Approved</b>  Dashboard status under WSP Plan and report must change to <b>Accepted</b> . The status must then be <b>updated in Great Plans</b> . The system to generate the <b>accepted letter</b> as in skills maintenance setup ( <b><u>Refer to 3. Maintenance – Skills Maintenance</u></b> ). System should not allow any final evaluation until the initial evaluation – only when interim approval has been selected.
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The **evaluate button** must grey out when this status has been selected.

**ii. Final evaluation: Rejected**

Dashboard status under WSP Plan and report must change to **Rejected**

All the **information per form/document** under the description for outstanding information must display on the letter.

At the bottom of the letter, the overall comments under the final evaluation must pull to the letter.

The **evaluate button** must grey out when this status has been selected.