

# SASSETA INDICIUM Skills Module Training Manual





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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: <a href="http://197.98.24.145/SASSETAIndicium/Account/Login.aspx">http://197.98.24.145/SASSETAIndicium/Account/Login.aspx</a> . The SASSETA Indicium link will navigate to the SASSETA Indicium Landing Page.

Indicium	
SETA Management System	SSE A
CUNTDOWN TO MANDATORY GRANTS SUBMISSION DEADLINE	,
LOG IN	
NOTICE > All Usernames & Passwords are CASE SENSITIVE!	
Username: Password:	
Login	
Eorgot Password	
Register as a new SDE Register as new discretionary grants applicant	

# **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	Maintenance
2	Select Skills Maintenance from the menu bar	Skills Maintenance





#### 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 >>           Letter Creation           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
WSP Let	tters	
2	Click on the "Create New" button to create WSP letters	Create New
3	Select the Financial year value	Financial Year 01 April 2020 – 31 March 2021 🗸
4	Select the "WSP" value from the CRM Letter Grant Type dropdown list	CRM Letter Grant Type WSP V
5	Select the Letter type that needs to be created	Approval Letter         On Hold         Query Letter         Receipt Letter         Rejection Letter
6	Select the desired Letter Salutation	CRM Letter Salutation Dear To whom it may concern





7 Complete the remaining		LETTER CREATION	
	free-text fields and save the created letter		
		Financial Year	01 April 2020 – 31 March 2021 🗸
		CRM Letter Grant Type	WSP V
		CRM Letter Type	Receipt Letter V
		CRM Letter Salutation	Dear 🗸
		Header A	Receipt Letter
		Header B	
		Body A	Receipt Letter
			✓
		Characters Left Body A	1986
		Body B	Receipt Letter
		Characters Left Body B	1986
		CRM Letter Greeting	Yours in Skills Development, V
		Sign Off Name	Test
		Job Title	Skills Practitioner
		Save	
SDF Lett	ers		
8	Click on the "Create New" button to create WSP letters	Create New	
9	Select the Financial year value	Financial Year	01 April 2020 – 31 March 2021 🗸
10	Select the "WSP" value from the CRM Letter Grant Type dropdown list	CRM Letter Grant Type	SDF V
11	Select the Letter type that needs to be created		LETTER CREATION
		CRM Letter Type	Approval Letter On Hold Query Letter Receipt Letter Rejection Letter
12	Select the desired Letter Salutation	CRM Letter Salutation	Dear To whom it may concern





13	Complete the remaining		LETTER CREATION
	free-text fields and save the created letter		
		Financial Year	01 April 2020 – 31 March 2021 🗸
		CRM Letter Grant Type	WSP V
		CRM Letter Type	Receipt Letter V
		CRM Letter Salutation	Dear 🗸
		Header A	Receipt Letter
		Header B	
		Body A	Receipt Letter
			~
		Characters Left Body A	1986
		Body B	Receipt Letter
			$\sim$
		Characters Left Body B	1986
		CRM Letter Greeting	Yours in Skills Development, V
		Sign Off Name	Test
		Job Title	Skills Practitioner
		Save	

# 3.2 Query Reasons

This section deals with the creation of Query reasons.

Steps	Action	Screenshot	
1	Click on Query Reasons	Maintenance >> Skills Maintenance >> Letter Creation Query Reasons Rejection Reasons Organisation WSP & ATR Bulk Letters SDF Bulk Letters Designated Email Address SDF Dashboard Documents SDF Dashboard Documents SDF Bulk Upload DG Maintenance DG Budget Maintenance Letter Creation DG	
2	Click on Add Query Reasons	Add Query Reasons	
3	Select the Financial Year value and complete the remaining free-text fields.	Financial Year Name Description Letter Type Save Cancel	01 April 2020 – 31 March 2021 V   Query   Query Reasons     DG   SDF   WSP





# 3.3 **Rejection Reasons**

This section deals with the creation of Rejection reasons.

Steps	Action	Screenshot
1	Click on Rejection Reasons	Maintenance >>Skills Maintenance >> Letter Creation Query 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
2	Click on Add Rejection Reasons	Add Rejection Reasons
3	Select the Financial Year value and complete the remaining free-text fields.	REJECTION REASONS         Financial Year       01 April 2020 – 31 March 2021 V         Name       Rejection         Description       Rejection Query         Letter Type       DG SDF WSP

# 3.4 Creating an Organisation

This section deals with the creation of Organisations.

Steps	Action	Screenshot
1	Click on Organisation	Maintenance >>         Letter Creation         Query Reasons         Rejection Reasons         Orgenisation         WSP & ATR Bulk Letters         SDF Bulk Letters         Designated Email Address         SDF Dashboard Documents         SDF Bulk Upload         DG Maintenance         DG Budget Maintenance         Letter Creation DG
2	Click on Create New	Create New





3	Select the Financial Year value and complete the remaining free-text fields.	REJECTION REASONS	
		Financial Year	01 April 2020 – 31 March 2021 V
		Name	Rejection
		Description	Rejection Query
		Letter Type Save Cancel	DG SDF WSP

# 3.5 SDF Application Evaluation

This section allows SASSETA users to evaluate SDF applications.

Steps	Action	Screenshot
View S	DF personal details and Orga	anisation Letter of Appointment
1	Click on the Skills Menu tab	Skills
2	Select SDF from the sub-tab	Skills >> Organisation SDF
3	Search for an SDF using one of the search criteria	SDF First Name Surname ID No Province SDL Number Search
4	When the SDF record is returned, click on it until it is highlighted and select the Action icon	SDF   First Name   Surname   ID No   B411190330085   Province   SDL Number   Search   Remove     First Name   Surname   ID No   Action   Ntsitsana   Kiti   8411190330085





5	You can view the SDF	Skills >>SDF >>						
5	Person Details.	Person Details				PERSON	N DETAILS - NTSI	TSANA KITI 8411190330085
	rerson Details.	Organisation Details	- I.	Edit				
			- 1	ID No			3411190330085	
			- 1	Alternate ID Ty	pe			
			- 1	Title	po		Vis	
				First Name			Ntsitsana	
			- 1	Middle Name		1	None	
				Surname		1	<iti< th=""><th></th></iti<>	
				Initials		1	N	
				Date of Birth			19/11/1984	
				Gender		I	Female	
			- 1	Equity		1	Black: African	
6	You can view the Organisation Details of the company they registered for.	Sulla >> SOF >> Person Details Cmanistion Pétais	(Cl STEP 2: Or Ap	lick on magnifiying nly AFTER you ppointment Let	eed to add the ro g glass next to Org I have added the tter.		er mber, you will be a	●
_			Letter of Appoil Save Remove Organisation N De-appointed	Intment: Select upload Name SDL Number X000000002	Status Document	: Name ts Workflow.pdf	Browse	1
7	You can also view the uploaded Letter of Appointment by clicking on	Organisation N	lame	SDL N	lumber	Status	Docume	ent Name
	the hyperlink	De-appointed		X00000	0002		Assessme	ents Workflow.pdf
		UAT Test 2		X00000	0001		Assessme	ents Workflow.pdf
Accontin	a SDE Application							
	ng 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				ORGA	NISATION		
	using one of the search	Legal Name						
	criteria	Trade Name						
		SDL Number						
		SIC Code					~	•
		SDF Name						
		Search						
11	When the organisation					ORGANISAT	ION	
	record is returned, click on it	Legal Name						
	until it is highlighted and	Trade Name						
	select the Action icon	SDL Number			Vacanas	01		
					X000000	UI		
		SIC Code						
		SDF Name						
		Search Remove Orga	anisation					
		Legal Name Trade Nam	ne <u>SDLN</u>	Number SIC	C Code	Parent SDL Nur	nber Action	
		UAT Test 2 UAT Test 2	X00000		0C - JUSTICE			





12	On the Organisation sub-tab select Associate SDF to update the SDF's status. Select the SDF you want to approve for that	Skills >>Organisation >>       Associate SDF - UAT TEST 2 (X00000000         Organisation Details Organisation Contact Organisation Bank Details Link Organisation CFO Details Approved SDFs       Edit       Resend Letter         First Name       Surname       E Mail       Status       Role       Letter Of Appointment         Associate SDF       Plan and Report       Training Committee       Document Uploads       Ntsitsana       Kiti       matthew@crimzone.com       Deactivated       Primary       NLRD File Count_PNG         Ntsitsana       Kiti       matthew@crimzone.com       Accepted       Primary       NewReportpdf.pdf         Ntsitsana       Kiti       nkiti@solugrowth.com       Assessments Workflow.pdf         Associate SDF - UAT TEST 2 (X000000000       Edit       Resend Letter	
	organisation and click on the Edit button	First Name         Surname         E Mail         Status         Role         Letter Of Appointment	
		NELI         BOPHELA         matthew@crimzone.com         Deactivated         Primary         NLRD File Count.PNG           Ntsitsana         Kiti         matthew@crimzone.com         Accepted         Primary         NewReportpdf.pdf           Ntsitsana         Kiti         nkiti@solugrowth.com         Primary         NewReportpdf.pdf	
14	Select the SDF Status and Role, then click Save	UPDATE SDF       First Name     Ntsitsana       Surname     Kiti       Status     Accepted ~       Role     Primary ~       Save     Cancel	
15	The system will give you an option to either email a letter to the SDF or download it.	SEND LETTER         Current Status Accepted         Financial Year       01 April 2020 – 31 March         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         First       Previous       Next       Last       Go to Page       1       Page 1 of 1         PREVIEW	
		SDF registration Approval Letter To whom it may concern Your SDF registration has been approved. Yours in Skills Development, MG Team MG Practitioner Cancel	*
16	The SDF Approval letter will be sent to the SDF	SDF Approval Letter.msg	





# 4 Register as an SDF

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

Steps	Action	Screenshot
Step 1:	Applicant Details	
1	Click on Register as a new SDF hyperlink	Register as a new SDF
2	Select the profile you wish to register for	<b>REGISTRATION</b> • PrimarySDF · SecondarySDF      Register      Cancel
3	Click on the Register button	
4	Complete the Applicant Details page	Applicant Details     ID No   Alternate ID Type   Title   First Name   Middle Name   Surname   Initials   Date of Birth   Gender   Equity   Disability Status   Relationship with Employer
5	Click the Save and Proceed button	Save and Proceed
Step 1:	Organisation Details	
6	When the Applicant Details page is completed, the SDF will have to link themselves to an Organisation on the Organisation Details page.	INDICIUM         STEP 1: FIRSTLY, you need to add the relavent SDL Number (Click on magnifiying glass next to Organisation)         STEP 2: Only AFTER you have added the relavant 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         Next         Finalise Application         A pending login status indicated that the SETA needs to accept your registration before you are granted access to an organizations workplace skills plan.
7	Click on the search icon to search for an Organisation	Organisation





8	Input the Organisation's SDL Number	SDL Number Search Select Cancel	[T00000011] ×	
9	Click on the Search button. The system will return the existing organisation.	Legal Name Small Org	Trade Name Test	SDL Number T000000011
10	Select the organisation and click the Select button	Select		
11	Click the Next button. A Letter of Appointment needs to be uploaded to complete the registration process	Letter of Appointment:	Select upload	Browse
	When the document is successfully uploaded click on Finalise Application button.	Finalise /	Application	
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.		ome, PrimarySDF - Pending SDF Log out Switch Profile RD - PRIMARYSDF TEST PRIMARYSDF	

# **5** Access to the system

This section allows the SDF to login to the SASSETA Indicium 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	LOG IN				
	login page to enter their login credentials.	NOTICE > All Usernames & Passwords are CASE SENSITIVE!				
		Username:				
		Password:				
		Login				
		Forgot Password				
SDF Das	hboard					
3	The SDF Dashboard will	SDF DASHBOARD - PRIMARYSDF TEST PRIMARYSDF	igvee			
	display all the companies	IMPORTANT	DOCUMENTATION			
	the SDF has registered for.	Financial Year 01 April 2020 – 31 March 2021 🗸 Please note the following door	uments are required for			
		Your Details Add Organisations submission 1. Financial Documents				
		Only one of the following finance - Stamped bank letter on officia	I bank letterhead			
		Please click here to download the second secon	e signed and stamped by the bank.			
		1         Small Org         T000000011         Accepted         2. Authorisation Page - Subm signed Authorisation page has - Please click here to download				
		3. OFO Code - Download OFO	Version 17			
4	Click on any row of Companies listed on the	No. Legal SDL SDF Mandatory Grant WSP Due Name Number Access Status Date	Action			
	dashboard to access that specific organisation details.	1 Small Org T000000011 Accepted	а <b>.</b>			
5	Click on the Action icon to open the organisation details	Action				

# **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				
Edit Or	ganisation Details					
1	Click on the Organisation Details tab	Organisation Details				
2	Click the Edit button to		ORGANISATION DETAILS - SM	IALL ORG (T000000011	)	
	complete the remaining Organisation details	Edit	DHET		SETA	
		SDL Number	T00000011	T00000011		
		Organisation Legal Name	Small Org	Small Org		
		Trade Name	Test	Test		
		Organisation Registration Number	SASS/Org	SASS/Org		
3	After completing the Organisation details, the SDF needs to confirm the details by ticking the "Confirm Organisation Details" checkbox	Confirm Organisati	on Details			





4	Click on the Organisation Contact tab	Organisation Cor	ntact
5	Select the Create button to create contact person details.	ORC Create Edit Remove	GANISATION CONTACT - SMALL ORG (T000000011)
6	Complete all the required fields and click on the Save button	Title	CREATE ORGANISATION CONTACT
		First Name Surname Initials Designation Telephone Number Cell Phone Number Fax Number E Mail Postal Address Line 1 Postal Address Line 2 Postal Address City	Required
7	The saved records will	Postal Code Province Save Cancel ORGAN	ISATION CONTACT - SMALL ORG (T000000011)
	display	Create         Edit         Remove           Title         First Name         Surname         Initials         Designation         Telephone           Ms         Registered SDF         Test         R         HR Manager         0124567890	Cell Phone Number         Fax Number         E Mail         Postal Address Line 1         Postal Address Line 2         Postal Address City         Postal Code         Postal Province           9         01245678909         nkiti@solugrowth.com         Postal Address Line 1         Postal Address Line 2         Postal City         0208         Gauteng
comple	ete Organisation Banking Details		
8	Click on Organisation Bank Details	Organisation Ban	k Details
9	Complete all the required fields and tick on the "Confirm banking details updated" checkbox before saving the information. <b>Note:</b> It is compulsory to upload the Bank Confirmation Letter. The system will not allow you to submit your Mandatory Grant forms if the document if not uploaded.	ORCAN         Account Holder         Bank Name         Other Bank         Other Bank         Account Type         Account Number         Branch Name         Branch Code         Last Date Updated         Last Updated by         Confirm banking details updated         Company Name Change Information         Bank Confirmation Letter (Stamped by Bank)	ISATION BANK DETAILS - SMALL ORG (T000000011)
10	Click on the Save button	Save	
Comple	ete Organisation CFO Details		





11	Click on Organisation CFO Details tab	<u>Organisati</u>	on CF	O Details		
12	Click on the Edit button to complete the required fields		ORGANISA	TION CFO DETAILS - SMALL OR	G (T000000	11)
		First Name			Required	
		Surname			Required	
		Cell Phone Number			Required	
		Fax Number			]	
		E Mail			Required	
		Designation			Required	
		Telephone Number			Required	
		Save Cancel				
Complet	te Training Committee details					
13	Click on the Training Committee tab	Training	Comn	nittee		
14	<b>Note</b> : The Organisation requires more than 150 Employees for the Training Committee details to be completed.	Organisation requires		COMMITTEE - SMALL ORG	; (T000000	011)
•	the required documents					
15	Click on the Document Uploads tab	<u>Documer</u>	nt Uple	oads		
16	From the Documentation Type dropdown list, the SDF		Docu	MENT UPLOADS - SMALL	. ORG (T0	00000011)
	will select the document	Documentation Ty	pe	Authorization Daga		
	they want to upload.	Add Document	þe	Authorisation Page Training Committee min	utes	
	Click on the Add Document	Add Document		Proof of training		
17	button Select the Browse button to			SEND DOCUMENT		
17	upload a document saved on	Financial Year		01 April 2020 – 31 March 2021		
	a computer.	Document Relates to		Authorisation Page	•	
						^
		Comment				
						$\checkmark$
		Document		C:\Users\nkiti\Documents\Work\\$	Sasseta\2010	Browse
18	Click the Upload button					DI0W3C
		Upload				





# **7 Completing Mandatory Grant Forms** In this section the SDF will complete the MG forms under the Plan and Report tab

Stone	Action	Screenshot			
Steps	Click on Plan and				
-	Report tab	Plan and Report			
2	General Rules	The following rules apply before creating the Plan and Report forms			
		1Organisation Details must be confirmed2At least one person should be captured under Organisation Contact4Banking details must be confirmed5Training 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	Dashboard Skills			
	Button to create the MG	Skills >>Organisation >>			
	forms	Organisation Details Organisation Contact Organisation Rank Details Link Organisation Organisation CFO Details Financial Year 01 April 2020 – 31 March 2021 V Create			
		Approved SDFs			
		Associate SDF Plan and Report Training Committee			
		Document Uploads			
		Grants and Levies Client Relationship Management EMP201			
4	Click on the newly	PLAN AND REPORT - NELITEST COMPANY (X00000008)			
	created Mandatory Grant record and select	View/Edit Plan and Report Forms Edit Print Plan and Report Forms			
	the View/Edit Plan and Report Forms button to	Financial Year Create			
	proceed to the forms	Skills Year Form Type Grant Status Due Date Status Date Submission Date Approved Date			
		01 April 2020 – 31 March 2021 Large Created 30/04/2020 21/11/2019			
		First         Previous         Next         Last         Go to Page         1         Page 1 of 1			
5	The System will prompt you to indicate whether	Main Page Mandatory Grant Application Forms 01 April 2020 – 31 March 2021 UAT TEST ORGANISATION - X00000002			
	this is your first-time	Is this your first time mandatory grant application submission Yes  Save			
	mandatory grant	Yes			
6	application submission Click on the Save				
	button to proceed to the forms	Save			
7	If you select "Yes" you	Еріт			
	will be asked if you are sure this is your first-	Are you sure this is your first time mandatory grant application submission?			
	time mandatory grant				
1	application submission.	Yes No			





7		ding page will	#	Form	Description		Due Date	Select
	display Grant a	the Planning nd		Planning Grant				Select
	Implem	entation Grant	1.	A	Administrative Details		30/04/2020	Select
	forms		2.	В	Finance Details		30/04/2020	Select
			3.	C1	Employment Summary		30/04/2020	Select
			4.	C2	Employee Provincial Breakdowr	1	30/04/2020	Select
			5.	D1	Scarce Skills (Hard to fill vacance	ies)	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	1	30/04/2020	Select
			10.	E4	Planned Adult Education and Tr	aining	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
6		the Select to complete rm						
7		npulsory forms a	re liste	ed below per O	rganisation size			
Pla	nning Gran	t						
#	Form	Description			Due Date	Compulsory		
1	А	Administrative	e Deta	ils	30/04/2020	Y		
2	В	Finance Detail	ls		30/04/2020	Y		
3	C1	Employment S	Summ	ary	30/04/2020	Y		

2	В	Finance Details	30/04/2020	
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	Υ
6	D2	Critical Skills (Top-up)	30/04/2020	Υ
			30/04/2020	Y – except for small and
7	E1	Strategic Objectives		medium private companies
8	E2	List the Training Priorities	30/04/2020	Υ
9	E3	Planned beneficiaries of training	30/04/2020	Υ
		Planned Adult Education and	30/04/2020	Y – except for Private
10	E4	Training		companies
		Planned Beneficiaries of Pivotal	30/04/2020	Y
11	F	Training		





			30/04/2020	Y	
12	G1	Actual Training		*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	
			30/04/2020	Y	
16	H1	Actual Pivotal Training		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	Ι	Variance Report	30/04/2020	Y	

# 7.1 Planning Grant

#### 7.1.1 Form A: Administrative Details

Steps	Action	Screenshot			
1	Click on the Select button to open the form	1. A	Administrative Details	30/04/2020	Select
2	You will be prompted to complete the form first before proceeding to the next form - Form B: FinanceDetails.	Back to MGA Forms Next Form Please con	Planning Grant - Administrative Det		ANISATION - X0000000 020 – 31 March 2021





Admir	istrative l	Details	

**Organisation Details** 

**Organisation Name** 

Skills Development Levy Number (SDL)

Physical Code

Physical Address Line 1

Physical Address Line 2

Physical Address Line 3

Physical Municipality

Physical Urban Rural

Physical Province

Postal Code

Postal Address Line 1

Postal Address Line 2

Postal Address Line 3

Postal Municipality

Postal Urban Rural

Postal Province

Standard Industry Code (SIC) for Main Business Activity

UAT Test Organisation
X00000002
0181
333 Main street Brooklyn
Address Line2
Cape Town
Tshwane Metro
Urban <b>v</b>
Gauteng <b>v</b>
0181
PO BOX 6144
Address Line1
Weltevredenpark
Tshwane Metro
Urban V
Gauteng V

9110C - JUSTICE





Conta	ct Details					
Title			Ms •			
Surna	me		L			
First I	Name					
ID Nu	mber		8411190330085			
Cell P	hone Number	0821111111				
Email	Address		nkiti@solugrowth.com			
Posta	I Code		(			
Posta	I Address Line 1		9-11-1 Quit 17			
Posta	I Address Line 2					
Posta	I Address Line 3					
Posta	l Municipality		C Tshwane Metro			
Posta	l Urban Rural		Urban 🔻			
Posta	l Province		Gauteng <b>v</b>			
Save	Cancel					
3	Only when the record is saved successfully the Next Form button will be active.	Save         Cancel           The Record has been saved successfully				

#### 7.1.2 Form B: Finance Details

<b>\cti</b>
lote nus <b>3: T</b>





#### **Finance Details** Contact details of the CFO or relevant financial person First Name Tester Surname Test CFO Designation 0112989777 **Telephone Number** 0798989898 **Cell phone Number** Email Address nkiti@solugrowth.com **Bank Details** Name of Bank First National Bank Current Type of Account Account Number 123456789 Account Holder UAT Person **Branch Name** Brooklyn 632005 **Branch Code** SECTION B: TRAINING BUDGET B1: Total Personnel budget for the current financial year R 250000 R 2500 B2: One percent (1%) of the personnel budget R 1000000 B3: Total planned training budget for the current financial year R 500000 B4: Additional funding planned for the current financial year Save Cancel 2 Click the Save button to Save Cancel save your records successfully. The Record has been saved successfully





#### 7.1.3 Form C1: Employment Summary

Steps	Action	Screenshot											
1	You will be prompted to												
	complete the form first before proceeding to	Back to MGA Forms		Pla	nning Grant	- Employ	ment Sum	imary				SATION - X	
	the next form - Form	Devision Fame								01 A	pril 2020	- 31 March 3	2021
	C2: Employee Provincial	Previous Form Next Form	Please com	plete form be	etore procee	aing							
	Breakdown												
2	Click on the magnifying												
	glass icon to search for	OFO Occupation	n					•					
	an OFO Occupation												
3	You may use one of the												
	search criteria to search for the OFO						Г						
	Occupation:	OFO Code											
	- OFO Code	OFO Description					Γ						
	- OFO Description	Search											
	OR	OFO Code			OFO De	scriptio	on						
	You may diel on the	2019-111101		L	ocal or P	rovinci	al Gove	ernment	t Legisla	itor			
	You may click on the Search button and the	2019-111102		F	arliamen	ntarian							
	system will return all	2019-111201		C	efence F	orce S	enior C	Officer					
	the latest OFO	2019-111202 General Manager Public Service											
	Occupations.	2019-111203		L	ocal Auth	nority M	1anage	r					
	·	2019-111204		S	enior Go	vernme	ent Offi	cial					
	Once you have	2019-111205		S	enior Po	lice Off	ficer						
	identified the correct	2019-111206		C	mbudsp	erson							
	OFO Occupation, click	2019-111207		S	enior Go	vernme	ent Mar	nager					
	on the record; the record will be	2019-111301		Т	raditiona	l Leade	ər						
	highlighted, and lastly	4											
	click on the Select	Select Cano	el										
	button.												
4	The system will adopt	OFO Occupation						201	9-111202	- Gener	al Mana	iger Publi	c Servic
	your selected records												
		Geography						🔍 Tsh	wane Me	tro			
5	Click on the magnifying												
	glass icon to search for												
	a Geographical area												
	should you wish to												
c	update the record Populate only numeric			~									
6	values on each	OFO Occupation		2019	-111202 -	Genera	l Manag	er Public	Service				
	"Gender, population,	Geography		<b>a</b>	••								
	disability status, and	Geography		S Tshv	vane Metro	D							
	age group" field	African	Colo	ured	In	dian/As	ian		White			Age Gro	up
		MFD	MF	= D	М	F	D	м	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	Add		1[									
	to save the records												





	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 Greate than 5
MANAGERS G		Tshwane Metro	10	0	1	0	10	6	10	0	0	0	20	13	20	30	20	25	25	0
Sub Total Grand Total			10	0	1	0	10	6	10	0	0	0	20	13	20	30 50	20	25	25 50	0
3	functi used bulks	onality onality to load on an dsheet	/ may d data exce	/ be a in		Bul	k Im	port							In	ΛΡΟΙ	RT EX	(CEI	_ DA	ТА
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)	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				e. ro	AutoSave	iome In Calibri B I	U ~	• 9 • A •   <u>♪</u> • <u>/</u> t	ayout For $A^{*} = =$ $A^{*} = =$  a  = =		ab 2℃ 1∰ ~	view N	umber	.00	Condition Formatting			E De	sert ~ elete ~ ormat ~ iells
	repor					5 2019-111 6 2019-111 7	101 - Local or F 205 - Senior Po	lice Officer	rnment Legislato		rt West r Tzaneen	A 1 0 0		D African Fem 0 1 1	nale Af O O O	E frican Disabl	ed Colour 0 0 0		C Coloured F 0 0 0	5 Female
LO	comp templ return select butto		excel ou mu e For ulk Ii	m an mport	d l	B Downlo Jpload Choo		Impor	t	bloyme	nt_Sum	mar	y_V1	.xlsx	In	MPO	RT E	XCE	L D/	ATA
	butto templ Wait f highli	for the ght in	oload uplo greei	the ad to n, and		Impo	rt C	Cancel												
11	Ensur templ	select e that ate is	the comp	oleted		М	Africa F	n D	м	Colou	red D		Ind M	ian/Asi F	ian C		М	Whit F		D
	correctly, if not, the system will reject the uploaded template and return an exception report.			d	0 Add	0	0 Impor	0	0	0 download	0		0	0	C	)	0	0		
	to do	on the wnload otion re	the																	





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4 Mossel Ba 0	1	0	6	6	6	6	1	4	6	0		6	0	6	5		reOFO Oc								
5	1	U	U	U	U	U	1	1	v	U		V	U	U	2	LITOLOI	101000	cupatio	Tubes	HOL CAISE					
12	save	when 1 succ Form tive.	essfu	ılly th	ne	ſ	le	xt	Fo	rm			1	1			1				1		I		

#### 7.1.4 Form C2: Employee Provincial Breakdown

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

Steps	Action	Screensh	ot									
1	<b>Note:</b> The total in this section must correlate with the total in Form C1.											
2	First select the record	Edit										
	you want to edit, then select the Edit button to	Western Cape	Northern Cape	Free State	Gauteng	Mpumalan	ga Lim	роро	North West	KZN	Total	
	update the form	0	0	0	50	0	0		0	0	50	
3	Populate the numeric	The total in this section must correlate with the total in Form C1.										
	values and select the	Western Cape	Northern Cape	Eastern Cape	Free State	Gauteng	Mpumalanga	Limpopo	North West	Ки	a Zulu-Natal	
	Update button to save the records.	0 Update Cancel	0	0	0	50	0	0	0		0	
12	Click the Next Form button to proceed to the next form – Form D1: Scarce Skills (Hard to fill vacancies)	Next	Form									

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

Steps	Action	Screenshot		
1	You will be prompted to complete the form first			
	before proceeding to the next form - Form	Back to MGA Forms	Planning Grant - Scarce Skills (Hard to fill vacancies)	UAT TEST ORGANISATION - X00000002 01 April 2020 – 31 March 2021
	D2: Critical Skills (Top- up)	Previous Form N	lext Form Please complete form before proceeding	





2	If you have nothing to report on this form tick the 'No Scarce Skills'	No Scarce Skills	
	checkbox; however, the `Reason for not having	Reason for not having scarce skills	Reason for not having scarce skills is required
	scarce skills' field is required	Save	
3	Else, if there is information to report,	Scarce Skills	
	complete the required fields and click Add to save your records	Occupational Category	<b>_</b>
	successfully.	Reasons for the scarcity skills	
		Other Scarce Skills	
		Estimated number	
		Number of qualified persons imported into RS	SA
		Name of learning programme that would be undertaken to address the scarce skills	
		Add	
4	Click the Next Form button to proceed to the next form.	Next Form	

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

Steps	Action	Screenshot
1	You will be prompted to complete the form first before proceeding to the next form - Form E1: Strategic	Back to MGA Forms       Planning Grant - Critical Skills (Top-up)       UAT TEST ORGANISATION - X00000002         01 April 2020 – 31 March 2021         Previous Form       Next Form       Please complete form before proceeding
2	Objectives If you have nothing to report on this form tick the 'No Critical Skills'	No Critical Skills
	checkbox; however, the 'Reason for not having critical skills' field is required	Reason for not having critical skills Reason for not having critical skills is required.
	required	Save





3	Else, if there is information to report,	Critical Skills						
	complete the required fields and click Add to save your records	Occupational Category	<b>્</b>					
	successfully.	Reasons for the critical skills	▼					
		Other Critical Skills						
		Estimated number						
		Number of qualified persons imported into RSA						
		Name of learning programme that would be undertaken to address the scarce and critical skills						
		Add						
4	Click the Next Form button to proceed to the next form.	Next Form						

# 7.1.7 Form E1: Strategic Objectives

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

Steps	Action	Screenshot
1	You will be prompted to complete the form first before proceeding to the next form - Form E2: List the Training Priorities	Back to MGA Forms     Planning Grant - Strategic Objectives     UAT TEST ORGANISATION - X00000002       01 April 2020 – 31 March 2021   Previous Form Next Form Please complete form before proceeding
2	Complete the form by listing the strategic objectives	Strategic objectives described in the entity's strategic business plan         List the strategic objectives         1.       Strategic objectives 1         2.       Strategic objectives 2         3.       Strategic objectives 3         4.
3	Click the Save button to save your records successfully.	Save     Cancel       The Record has been saved successfully
4	Click the Next Form button to proceed to the next form.	Next Form





#### 7.1.8 Form E2: List the Training Priorities

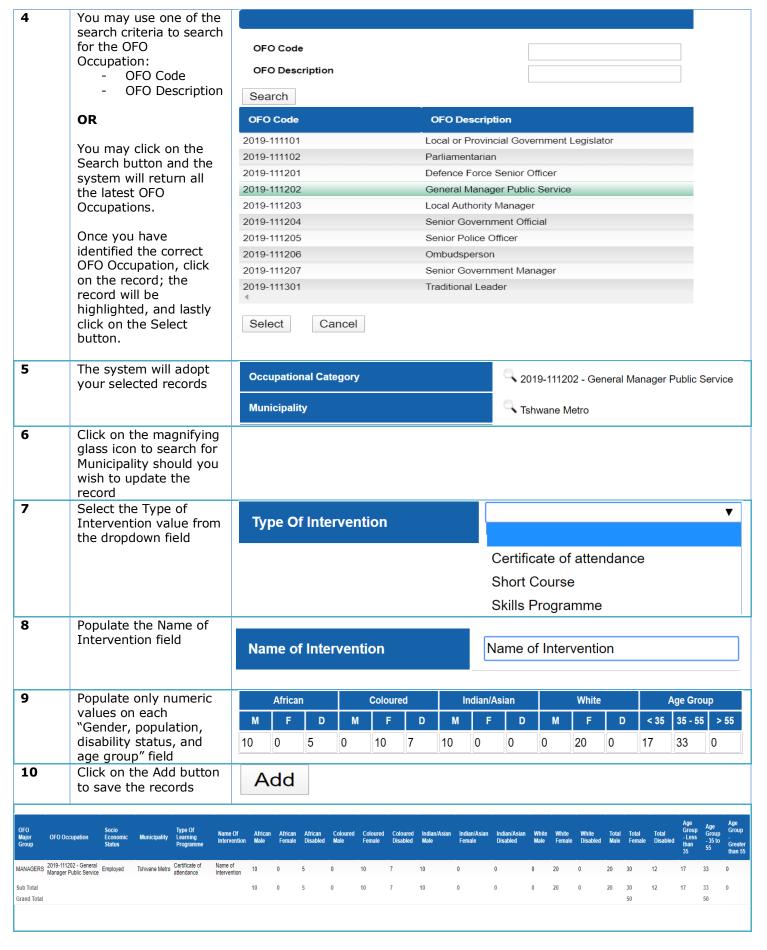
This form is compulsory for both Public and Private entities, and all organisation sizes.

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	Back to MGA Forms       Planning Grant - List the Training Priorities       UAT TEST ORGANISATION - X00000002         01 April 2020 – 31 March 2021         Previous Form       Next Form       Please complete form before proceeding
2	Complete the form by listing the training priorities	Strategic training priorities of the entity derived from the strategic objectives         List the training priorities       1         1.       Training priorities 1         2.       Training priorities 2         3.       Training priorities 3         4.
3	Click the Save button to save your records successfully.	Save     Cancel       The Record has been saved successfully
4	Click the Next Form button to proceed to the next form.	Next Form

#### 7.1.9 Form E3: Planned Beneficiaries of training

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	Back to MGA Forms         Planning Grant - Planned Beneficiarie           Previous Form         Next Form         Please complete form before proceeding	es of training UAT TEST ORGANISATION - X00000002 01 April 2020 – 31 March 2021
2	Select the Socio- economic status value from the dropdown field	Socio Economic Status	▼ Employed Unemployed
3	Click on the magnifying glass icon to search for an OFO Occupation	OFO Occupation	









8	The Bulk Import functionality may be used to load data in bulks on an excel	Bulk Import		
	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.	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.	AutoSave       Image: System of the system of	Conditional Format as Cell Formatting ~ Table ~ Styles ~ Styles Type Of Intervention Ni Skills Programme SF Certificate of attendance CC	Insert ~ Delete ~ Format ~ Cells E The of Intervention - 3 DA - 2 - 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	Download Excel Template         Upload file to Import         Choose file       2020_Beneficiaries_Ped_Training_V1         Import       Cancel	IMPORT EXCE	DATA
11	then select Import Ensure that the template is completed correctly, if not, the system will reject the uploaded template and return an exception report.	African         Coloured         Indian/Asi           M         F         D         M         F         D         M         F           0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0         0	D         M         F           0         0         0	D 0
	Click on the hyperlink to download the exception report and read the Error Description to identify what needs to be rectified.			





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	В	C		D	Ε	F	G	Н	1	J	K	L	М	N	0	Р	Q	R	S	Т	U	V	W	Х	Y	Z
1	Municipa	l Africa	nMa Afrio	anFer A	fricanDis	s Coloure	edN Coloure	dF Coloured	C IndianMa	l IndianFer	r IndianDi	sa WhiteMa	WhiteFen	WhiteDisa	Age - Less	Age - 35 t	Age - Gre	ea ImportSta	a ErrorDes	cription						
2	Beaufort	<b>v</b> 1	0	0	)	0	0	0	0			0	0	0	0	0	1	Error on r	Numeric	Fields cor	ntains Alph	anumerical	values; (	FO Occupatio	n does not	t exist
3	Greater T	z0	1	0	)	0	0	0	0	1	1	0	0	0	0	0	2	Error on r	OFO Occ	upation d	oes not exi	st				
4	Mossel Ba	a 0	1	0	)	0	0	0	0	1	1	0	0	0	0	0	2	Error on r	e OFO Occ	upation d	oes not exi	st				
5																										
1:	2	s N	ave	d si Fo	ucce rm t	essfu	recoro ully th on wi	ne	N	lex	t F	orn	n	- -						<u>.</u>						

#### 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	Back to MGA Forms       Planning Grant - Planned Adult Education and Training       UAT TEST ORGANISATION - X0000000         01 April 2020 – 31 March 2021    Previous Form Next Form Please complete form before proceeding
2	Should there be nothing to report on this form tick the 'Nothing to Report' checkbox, and click Save	Nothing to Report  Save
3	First select the record you want to edit, then select the Edit button to update the form	Edit         AET       AET       African       African       African       Coloured       Coloured       Indian       Indian       Indian       White       White       White         Level       Type       Male       Female       Disabled       Male       Female       Disabled       Male       Female       Disabled         Level 1       0       0       0       0       0       0       0       0
4	Populate the numeric values and select the Update button to save the records.	Click on relevant AET level to edit & complete the info           AET Level         Level 1           African         Coloured         Indian/Asian         White           M         F         D         M         F         D         M         F         D           10         0         0         10         0         0         10         0         20         0           Update         Cancel         Ca
5	Only when the record is saved successfully the Next Form button will be active.	Next Form





#### 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	Socio Economic Status	▼
			Employed Unemployed
2	Click on the magnifying glass icon to search for the Occupation Category	Occupational Category	
3	You may use one of the search criteria to search for the OFO Occupation: - OFO Code - OFO Description	OFO Code OFO Description Search	
	OR	OFO Code	OFO Description
	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.	2019-111101 2019-111102 2019-111201 2019-111202 2019-111203 2019-111204 2019-111205 2019-111206 2019-111207 2019-111301 4 Select Cancel	Local or Provincial Government Legislator Parliamentarian Defence Force Senior Officer General Manager Public Service Local Authority Manager Senior Government Official Senior Police Officer Ombudsperson Senior Government Manager Traditional Leader
4	The system will adopt your selected records	Occupational Category Municipality	C 2019-111202 - General Manager Public Service
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 value from the dropdown field	Type Of Pivotal Programme	▼ Artisan Bursaries Learnerships
			Skills programmes
7	Populate the Name of		Work Integrated Learning / Internships
	Pivotal Programme Intervention field	Name of Pivotal Programme Intervention	Name of Pivotal Programme Intervention
8	Select the NQF value from the dropdown field	NQF Level	▼.
			Below Level 01
			Level 01
			Level 02
			Level 03
9	Populate only numeric values on each "Gender, population, disability status, and age group" field	African         Coloured         Indian/Asian           M         F         D         M         F         D           10         0         5         0         10         7         10         0         0	White         Age Group           M         F         D         < 35
10	Click on the Add button to save the records	Add	
OFO Major OFO Occ Group	Socio Type Of Name cupation Economic Municipality Learning Interv Status Programme	Of African African African Coloured Coloured Coloured Indian/Asian Indian/Asian Indian/Asian ntion Male Female Disabled Male Female Disabled Male Female Disabled	Age Group         Age Group         Age Group         Age Group         Age Group         Age Group           Male         Female         Disabled         Male         Female         Disabled         Total         Total
MANAGERS 2019-1112 Manager F Sub Total Grand Total	122 - General Employed Tshwane Metro Certificate of Name or oublic Service Employed Tshwane Metro attendance Interver	tion 10 0 5 0 10 / 10 0 0	0 20 0 20 30 12 17 33 0 0 20 0 20 30 12 17 33 0 50 50 50
11	The Bulk Import functionality may be used to load data in bulks on an excel	Bulk Import	
	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.	Download Excel Template         Upload file to Import         Choose file       No file chosen         Import       Cancel	IMPORT EXCEL DATA





12	You may edit over the existing records –	AutoSave			Ŭ		es_Planned_Traini		,∕⊃ Sear	ch			
	they're available for	ra X	Calibri	Draw	Page Layout	Formula $\equiv \equiv \equiv$		Review Vi	ew Help			-//	isert 🗸 📘
	your ease of reference.	Paste 🗳	BIU		<u> </u>	= = =		~ 🖀 • %	5 9   €0 .00	Conditiona Formatting	I Format as Table Y St	Cell	ormat v 🔍
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		4 Unemplo			1 - Local or Prov	incial Governm	ent Legislator	Municipality Albert Luthuli		Skills Prog	ntervention gramme	SP - 3	e Of Intervention
10	To upload the	5 Employe 6 Unemplo			5 - Senior Police 2 - Parliamentar			Amahlathi Mkhomazi Wi	lderness Area	Certificate Short Cou	of attendance rse	COA SC - :	
10	completed excel									Імро			ΔΤΑ
	template you must return to the Form and	Downlo	ad Exce	Tomp	lato								
	select the Bulk Import		file to Ir										
	button.	Choo	se file	WSPA	ATR Bu	lk Impo	ort2	482986	626169	2.xlsx			
	Click on the Choose file button to upload the												
	template.	Impo	rt Ca	ncel									
	Wait for the upload to	Impo		licei									
	highlight in green, and then select Import												
11	Ensure that the		African			Coloure	d	In	dian/As	ian		White	
	template is completed correctly, if not, the	М	F	D	М	F	D	М	F	D	М	F	D
	system will reject the uploaded template and	0	0	0	0	0	0	0	0	0	0	0	0
	return an exception	Add	Bulk Ir	nport	Click he	ere to do	ownload	Bulk Im	port suc	cess an	<u>id excep</u>	otion rep	ort
	report.												
	Click on the hyperlink to download the												
	exception report and read the Error												
	Description to identify												
	what needs to be												
	rectified.												
S2		ontains Alph	anumerical v	alues; OFO	Occupation	does not e	xist						
S2		ontains Alph	anumerical v	alues; OFO	Occupation	does not e	xist						
В	• : $X \checkmark f_x$ Numeric Fields c C D E F G H		J K	L	M N	0	P Q	R	S	r u	V	W X	Y
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B Municipal A Beaufort V1 Greater Tz0 Mossel Ba0	C     D     E     F     G     H       AfricanDia AfricanFer AfricanDis Coloured/ ColouredF     0     0     0     0       0     0     0     0     0     0       0     1     0     0     0     0	I IC IndianMal Indi	J K anFerr IndianDis	L WhiteMal Wh	M N niteFem WhiteD	O isa Age - Less A	P Q ge - 35 t( Age - ( 1 2	Grea ImportSta I Error on ri Error on ri	rrorDescriptio Numeric Fields DFO Occupatio	n	numerical value		
B Municipal A Beaufort V1 Greater Tz <sup>0</sup>	C     D     E     F     G     H       AfricanMa AfricanFer AfricanDis Coloured C	I IC IndianMal Indi O O 1 O 1	J K anFerr IndianDis 1 1	L WhiteMal Wh 0 0 0 0 0 0	M N niteFem WhiteD 0 0	O isa Age - Less A O O	P Q Ige - 35 t( Age - ( 1 2	Grea ImportSta I Error on ri Error on ri	rrorDescriptio Numeric Fields DFO Occupatio	n contains Alphar n does not exist	numerical value		
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#### 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	12. G1	Actual Training	30/04/2020 Select				
2	Select the Socio- economic status value from the dropdown field	Socio Economic Status						
				Employed				
				Unemployed				
3	Click on the magnifying glass icon to search for an OFO Occupation	OFO Occupation		0				
4	You may use one of the search criteria to search							
	for the OFO	OFO Code						
	Occupation: - OFO Code	OFO Description						
	- OFO Description	Search						
	OR	OFO Code	OFO Descriptio	on				
	You may click on the	2019-111101	Local or Provincia	al Government Legislator				
	Search button and the	2019-111102	Parliamentarian					
	system will return all	2019-111201	Defence Force Se					
	the latest OFO	2019-111202 2019-111203	General Manager Local Authority Ma					
	Occupations.	2019-111203	Senior Governme					
	Once you have	2019-111205	Senior Police Office					
	identified the correct	2019-111206	Ombudsperson					
	OFO Occupation, click	2019-111207	ent Manager					
	on the record; the record will be	2019-111301 <pre></pre>	Traditional Leader	-				
	highlighted, and lastly click on the Select button.	Select Cancel						
5	The system will adopt your selected records	Occupational Category		2019-111202 - General Manager Public Service				
		Municipality		C Tshwane Metro				
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	Ту	vpe Of	f Intei	vent	ion										V
									С	ertific	cate c	of atte	ndanc	e		
									S	hort (	Cours	e				
									S	kills F	Progra	amme	•			
8	Populate the Name of Intervention field	Na	me of	Inter	venti	on			Na	ame c	of Inte	rventi	on			
9	Populate the Name of Institution field	Na	ame o	f Insti	tutio	n			Na	ame o	of Inst	titutior	h			
10	Populate numeric values in the Completed field	Co	omple	ted					2							
11	Populate numeric values in the Not Completed field	No	ot Cor	nplet	ed				5							
12	This will be a required field if records are entered into the Not Completed field	Re	eason	For I	lon-(	Comp	letion		Re	easor	n For	Non-C	Compl	etion		
13	Populate only numeric		Africar	ı		Coloure	ed	In	dian/As	ian		White			Age Grou	ıp
	values on each "Gender, population,	М	F	D	М	F	D	М	F	D	м	F	D	< 35	35 - 55	> 55
	disability status, and age group" field	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	Α	dd													
15	The Import previous year's data button may be used if there are no changes from the previous MG submissions	Ir	npo	rt p	rev	ious	s ye	ar's	a da	ta						

#### 7.2.2 Form G2: Completed AET Programmes

This form is compulsory except for private companies.

Steps	Action	Sci	een	shot											
1	Should there be nothing to report on this form tick the 'Nothing to Report' checkbox, and		Not	hing	j to F	Repor	t								
	click Save	S	Sav	'e											
2	First select the record	Edit													
	you want to edit, then select the Edit button to update the form	AET Leve	АЕТ I Туре	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





3	Populate the numeric values and select the	Click on relevant AET level to edit & complete AET Level	the info Level 1		
	Update button to save	African	Coloured	Indian/Asian	White
	the records.	M     F     D       10     0     0       Update     Cancel	M         F         D           10         0         0         0	M         F         D           10         0         0	M         F         D           0         20         0
4	Select the Next Form button to proceed to the next form	Next Form			

#### 7.2.3 Form G3: Expenditure of Training Budget

Steps	Action	Screenshot	ŧ		
Input th	e expenditure of training b	udget on the	first section of t	the form	
1	Whichever Socio- Economic status value	Type of Interver	ntion Delivered	Actual Cost (ZAR) – Employed	Actual Cost (ZAR) – Unemployed
	was selected in Form G1, the available Actual Cost (ZAR) field will	Short Course		50000.00	0.00
	open.	Total		50000.00	0.00
Input th	e expenditure of additiona	l budget on t	he second section	on of the form	
1	Populate the Source field	Source	Source		
2	Populate the Amount field in the specified format	Amount (ZAR)	1500000.00		
3	Populate the Project field	Project	Project	_	
4	The Grand Total field will auto-populate the amounts entered	Grand Total	1550000.00		
5	Click the save button	Save Ca	ancel		
		The Record	has been saved suc	ccessfully	
6	Select the Next Form button to proceed to the next form	Next F	orm		





#### 7.2.4 Form G4: Impact Assessment

This form is compulsory except for private companies.

Steps	Action	Screenshot
Select	the available checkboxes	
Impact	Assessment	
		<ul> <li>In response to legislation</li> <li>To meet organisational human resource development policies and targets</li> </ul>
		To help the organisation resolve recognised problems
		To help improve operation and functional efficiency
For wh	nat reasons did the organisation de ertake staff training? (Select all	To increase revenue from current operations
applica	able options)	To reduce business risk
		To improve product/service quality
		To adapt to evolving industry/technologies
		To be seen following "good practice"
		Other
1	When "Other" checkbox is selected, a reason must be provided.	<ul> <li>✓ Other</li> <li>Save Cancel</li> <li>Other reasons required when Other check box is selected.</li> </ul>
2	Click the save button	Save Cancel
-		The Record has been saved successfully
3	Select the Next Form button to proceed to the next form	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	Socio Economic Status		<b>▼</b>
				Employed Unemployed
2	Click on the magnifying glass icon to search for the Occupation Category	Occupational Categor	У	<u></u>
3	You may use one of the search criteria to search for the OFO Occupation: - OFO Code - OFO Description	OFO Code OFO Description Search		
	OR	OFO Code	OFO Description	n
	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.	2019-111101 2019-111102 2019-111201 2019-111202 2019-111203 2019-111204 2019-111205 2019-111206 2019-111207 2019-111301 ◀ Select Cancel	Local or Provincia Parliamentarian Defence Force Se General Manager Local Authority Ma Senior Governmen Senior Police Offic Ombudsperson Senior Governmen Traditional Leader	Public Service anager nt Official cer nt Manager
4	The system will adopt your selected records	Occupational Category		2019-111202 - General Manager Public Service
		Municipality		Tshwane Metro
5	Click on the magnifying glass icon to search for Municipality should you wish to update the record			





6	Select the Type of		T
-	Pivotal Programme	Type of Pivotal Programme Delivered	
	Delivered value from the dropdown field		
			Artisan
			Bursaries
			Learnerships
			Skills programmes
			Work Integrated Learning / Internships
7	Populate the Name of Pivotal Programme Delivered field	Name of Pivotal Programme Delivered	Pivotal Programme Delivered
8	Populate the Name of Institution field	Name of Institution	Name of Institution
9	Indicate how many individuals have	Completed	
	completed and/or not completed their	Not Completed	5
	training. If the Not Completed field is populated, the	Reason For Non-Completion	Reason For Non-Completion
	reason for non- completion must be		
10	provided. Populate only numeric	African Coloured Indian/Asian	White Age Group
	values on each		M F D < 35 35 - 55 > 55
	"Gender, population, disability status, and age group" field		0 20 0 17 33 0
11	Click on the Add button to save the records	Add	
OFO Major OFO Oco Group	Socio Type Of Name cupation Economic Municipality Learning Interve Status Programme		Age Age Age ite White White Total Total Total Group Group Group le Female Disabled Male Female Disabled tabas 35 to Greater 35 than 55 than 5
MANAGERS 2019-1112 Manager F	102 - General Employed Tshwane Metro Certificate of Name of Public Service Interven	<sub>ion</sub> 10 0 5 0 10 7 10 0 0 0	20 0 20 30 12 17 33 0
Sub Total Grand Total		10 0 5 0 10 7 10 0 0	20 0 20 30 12 17 33 0 50 50
12	The Bulk Import functionality may be	Bulk Import	
	used to load data in		
	bulks on an excel spreadsheet.		IMPORT EXCEL DATA
		Download Excel Template	
	Once the Bulk Import button is clicked, a	Upload file to Import	
	'Download Excel Template' hyperlink will	Choose file No file chosen	
	be available to generate		
	the excel spreadsheet; and you may save it on	Import Cancel	
	your PC to complete it offline.		





13	You may edit over the	AutoSave	, Con E	<b></b>	® × ⇒ 2	020_Beneficiarie	s_Planned_Train	ing_V1 - Ex	∕⊃ Sear	rch				
	existing records –		Home Ins	ert Draw	Page Layou	t Formula	s Data	Review V	iew Help					
	they're available for your ease of reference.		Calibri	~ 9	e • A^ A`	$\equiv \equiv \equiv$	≫~ ~ eb						Insert 🗸	Σ.
	your cuse of reference.	Paste LE ~ 🗳	BI	<u>U</u> ~   <u>+</u> ~	<u> 4</u> ~ <u>A</u> ~			~ 🖾 • %	5 <b>9</b>   € 0 .00	Condition Formatting	al Formatas g ~ Table ~ !	Cell		
	Leave the cells on Zero	Clipboard	ß	Font		Alig	nment	NI NI	imber	5	Styles		Cells	
	"0" if there is nothing to	A7	-	$\times \checkmark f_x$										
	report.		Δ			В			С		D		F	E
		2 Socio Ec 4 Unemple	onomic Status	OFO Occup		vincial Governme	ant Logislator	Municipality Albert Luthul	-	Type Of Skills Pro	Intervention		me Of Interven	
		5 Employe 6 Unemplo	ed	2019-1112	05 - Senior Polic 02 - Parliamenta	e Officer	ent Legislator	Amahlathi	ilderness Area		te of attendance	e CC	- 1	
14	To upload the	o jonempr	oyeu		or runamente			WIRHONINZ I V	iderness Area	511012 00	uise			
	completed excel									Імра	ORT E	YCEI	DATA	
	template you must											AUEL	DAIA	
	return to the Form and select the Bulk Import			<u>el Temp</u>	<u>olate</u>									
	button.	Upload	d file to	Import										
		Choo	ose file	WSP	ATR Bi	ilk Impo	ort2	482986	626169	2.xlsx				
	Click on the Choose file													
	button to upload the template.													
	template.	Impo	ort C	ancel										
	Wait for the upload to													
	highlight in green, and													
	then select Import													_
15	Ensure that the template is completed		Africa	n		Coloure	d	In	dian/As	ian		Whit	e	
	correctly, if not, the	М	F	D	М	F	D	М	F	D	м	F	D	
	system will reject the	0	0	0	0	0	0	0	0	0	0	0	0	٦
	uploaded template and													
	return an exception report.	Add	Bulk	Import	Click h	<u>ere to do</u>	ownload	Bulk Im	port su	ccess ai	<u>nd exce</u>	<u>ption re</u>	<u>port</u>	
	Click on the hyperlink													
	to download the													
	exception report and read the Error													
	Description to identify													
	what needs to be													
	rectified.													
<b>S</b> 2		ontains Alph	anumerica	values: OF(	) Occupation	n does not e	vist							
52	Ja humene netus o		anumenta		, occupation									
B 1 Municina	C D E F G H Dal AfricanMa AfricanFer AfricanDis ColouredN ColouredF Coloured	ا hol leMaeibal ک	J K lianFerr Indiani	L Nica WhiteMal V	M N VhiteFern White	0 A 229 L - 97 A 221	P Q	R GrealmoortSta	S ErrorDescriptic	T U	V	W X	Y	Ż
2 Beaufort	t V1 0 0 0 0 0	0		0 0	0	0 0	1			contains Alpha	numerical valu	ies; OFO Occup	ation does not	t exist
3 Greater		0 1	1	0 0		0 0				n does not exis				
4 Mossel E 5	Ba <sup>0</sup> 0 1 0 0 0	0 1	1	0 0	0	0 0	2	Error on re	UFO Occupatio	n does not exis	t			
16	Only when the record is			-							1 (		I	
	saved successfully the	Ne	ext F	orm										
	التبيين مسلمان والمستعم المستعم													
	Next Form button will be active.													





#### 7.2.6 Form H2: Expenditure of Pivotal Training

Steps	Action	Screenshot			
Input th	e expenditure of pivotal tra	ining budget	on the first sec	tion of the form	
1	Whichever Socio- Economic status value	Type of Interven	tion Delivered	Actual Cost (ZAR) – Employed	Actual Cost (ZAR) – Unemployed
	that was selected in Form H1, the available Actual Cost (ZAR) field	Short Course		50000.00	0.00
	will open.	Total		50000.00	0.00
Input th	e expenditure of additional	budget on th	ne second section	on of the form	
1	Populate the Source field	Source	Source		
2	Populate the Amount field in the specified format	Amount (ZAR)	1500000.00		
3	Populate the Project field	Project	Project		
4	The Grand Total field will auto-populate the amounts entered	Grand Total	1550000.00		
5	Click the save button	Save Ca	ncel		
		The Record h	as been saved suc	cessfully	
6	Select the Next Form button to proceed to the next form	Next Fo	orm		





#### 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.

aining Intervention Forms	2019 Total Planned	2019 Total Trained	Total Variance	Variance Reason
kills Programme	0	0	0	
Certificate of Attendance	0	0	0	Budget Constraints
Short Course	0	40	0	Change in company objectives
Work Integrated Learning / Internship	0	0	0	Change in Ownership Change in Technology
Artisan	0	0	0	Could not acquire appropriate new personnel
Bursary	0	0	0	Could not secure appropriate dates with training provider(s)
Learnership	0	0	0	Downsizing Industrial Relations
Save Cancel				

# 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	Back to MGA Forms
2	Select the Submit MGA Forms button	Submit MGA Forms
3	The system will check for compulsory forms whether they were completed or not	Unable to submit. Form D1: Scarce Skills is compulsory. Submit MGA Forms
4	The WSP/ATR status will be displayed	Main Page       Mandatory Grant Application Forms 01 April 2020 – 31 March 2021       UAT TEST ORGANISATION - X00000002         Update First Time Submission Status       WSP ATR Status: Submitted
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	Skills			
2	Select Organisation from the sub-tab	Skills >> <a href="https://www.sciencescommutationsciencescom">Organisation</a> SDF			
3	Search for an Organisation using one of the search criteria	Legal Name Trade Name SDL Number SIC Code SDF Name Search Create New		ORGANISATION	T
4	Click on the record that is returned and it will	Legal Name	Trade Name	SDL Number	SIC Code
	be highlighted.	UAT Test Organisation	UAT Test Orgar	nisation X000000002	9110C - JUSTICE
5	be highlighted. Click on the Action icon to open the company details	UAT Test Organisation Action	UAT Test Organ	hisation X000000002	9110C - JUSTICE





7	Select the Financial Year that must be evaluated	MANDATORY GRANT EVALUATION - UAT TEST ORGANISATION (X00000002)         Please select a Financial Year.         v       01 April 2020 – 31 March 2021         01 April 2019 – 31 March 2020       01 April 2019 – 31 March 2020         01 April 2018 – 31 March 2020       01 April 2017 – 31 March 2019         01 April 2017 – 31 March 2018       01 April 2016 – 31 March 2017         01 April 2015 – 31 March 2016       01 April 2015 – 31 March 2015         01 April 2013 – 31 March 2015       01 April 2013 – 31 March 2013         01 April 2013 – 31 March 2013       01 April 2012 – 31 March 2013							
8	Indicate whether the company is Levy or - Non-Levy Paying on the Radio button. Input comments in the Comments free-text	Organisation Name	UAT Test Organisation 01 April 2020 – 31 March		Organisation SDL Number			X00000002	
		2021 2021			Grant Status				
		Grant Submission Date 14/01/2020			Grant Su	t Submitted By		tsitsana Kiti	
		Levy / Non-Levy Paying Ves   Yes		No	Commen	mments:		nput Comments	
	field	Evaluation Status Evaluation Checklist: Uploaded Documents WSP 20/21 - ATR 19/20							
9	Complete the Evaluation checklist for uploaded documents. You may click on the hyperlink of each uploaded document to view the contents of the document.	Document Name		Document Uploaded				R 19/20 nents	
		Company Name Change Information		No		es No			
		Bank Confirmation Letter (Stamped By Bank)		Yes		es No			]
		Authorisation Page		Yes		es No			]
		Authorisation Page         Training Committee minutes         Bank Confirmation Letter         Proof of training		Yes		es No			]
				No		es No			]
				Yes		es No			
				No		es No			





AT Cc 20 Yo hy co	valuation checklis FR (Training ompleted in year 019) ou may click on t yperlink of each f ompleted to view ontents of the for		Form Name	е		Form Completed?	Completed in year All In Order?	Comments			
Cc 20 Yo hy co	ompleted in year 019) ou may click on t yperlink of each f ompleted to view		G1 Actual T					oonnonto			
hy co	perlink of each f			raining		Yes	O Yes O No				
co	mpleted to view		G2 Complet	ed AET Progra	mmes	Yes	O Yes O No				
		the	<u>G3 Expendi</u>	<u>ture of Training</u>	<u>Budget</u>	Yes	OYes ONC				
			<u>G4 Impact A</u>	Assessment		Yes	O Yes O No				
			H1 Actual Pi	ivotal Training	,	Yes	OYes ONO				
			H2 Expendit	ture of Pivotal 1	Fraining	Yes	OYes ONO				
Ev W! Pla Yo hy co	omplete the valuation checklis SP (Work Skills anning in year 20 ou may click on t vperlink of each f ompleted to view ontents of the for	020) he form the									
Status of WSP/ATR Submission 2020/2021 – Initial Evaluation											
		11551011	2020/20	<b>0</b> 21 - 111		aluation					
Qu All on At Th	<ul> <li>Dashboard status under WSP Plan and report must change to Query.</li> <li>Query e-mail to be sent to the designated recipients.</li> <li>All the information per form and document under the description for outstanding information must display on the letter.</li> <li>At the bottom of the letter, the overall comments under the initial evaluation must pull to the letter.</li> <li>The system is then to open the document upload tab only for 10 working days from the date of status change and then close.</li> <li>The query due date must then update on the dashboard</li> </ul>										
Th											
s	Skills Year	Form Type	Grant Status	Due Date	Status Date	Submission Date		terim pproval Date	Rejected Date	Query Due Date	
	1 April 2020 – 31 arch 2021	arge	Submitted	30/04/2020 1	4/01/2020	0 14/01/2020					
	When the submission is then again done – the query submission date must update. The submit button will be active.										
Status of V	NSP/ATR Subm	nission	2020/20	021 – Fin	al Eva	luation					
13	i. Final eval	uation	: Approv	/ed							
Th Th <u>Sk</u> Sy	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 <u>(Refer to 3. Maintenance –</u> <u>Skills Maintenance)</u> System should not allow any final evaluation until the initial evaluation – only when interim approval has been selected.										





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.