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Mandatory Grant Application Manual 2017

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1 INTRODUCTION

1.1 Purpose of this Document

The purpose of this document is to ensure that Skills Development Facilitators (SDFs) are equipped with all the information pertaining to the CATHSSETA Indicium system. This will therefore permit the facilitator to register as an CATHSSETA Indicium SDF and will enable the SDF to comply with the submission of the Workplace Skills Plan (WSP) and Annual Training Report (ATR), by the legislative due date (30 April 2016).

1.2 Scope of the Document

This document will assist the SDF by showcasing his/her roles and responsibilities in the Culture, Art, Tourism, Hospitality, and Sport Sector Education and Training Authority (CATHSSETA)

Terms and Definitions

The following terms are used in this document

#	Term / Acronym	Definition
1	Indicium	Latin for Information – name of the system developed for CATHSSETA.
2	SDF	Skills Development Facilitator
3	WSP	Workplace Skills Plan
4	ATR	Annual Training Report
5	Lookup Field	A field containing a set of values to select from, no other values than these can be used
6	Free Text Field	This field allows the SDF to enter any text
7	Numeric Field	This field allows the SDF to enter only numerical values
9	Alphanumeric Field	This field allows the SDF to enter alphabetical as well as numerical values
10	Currency Field	This field gets noted in Rand value

2 INDICIUM ACCESS

2.1 Website

The CATHSSETA Indicium system can be accessed via the CATHSSETA website www.cathsseta.org.za. The **Mandatory Grants Portal** option is available on the **Funding** section.

CATHSSETA FUNDING

The objectives of the Skills Development Act Number 97 of 1998, as amended, are to facilitate skills development for previously disadvantaged individuals in order to grow the economy of South Africa.

This mandate is fulfilled through the disbursements of funds for skills development in accordance with SETA Grant regulations.

CATHSSETA receives funds from levy-paying employers within its sub. These funds are disbursed as follows:

- 20% is allocated to the NSF.
- 10% is allocated to SETAs for administrative purposes.
- 20% is allocated to mandatory grants.
- 49.5% is allocated to discretionary grants.
- 0.5% is allocated to the Quality Council for Trades and Occupations.

Discretionary Grants   Mandatory Grants

This link will revert to the CATHSSETA Indicium login page

2.2   Technical Information

2.2.1   Browsers

CATHSSETA Indicium is compatible with the following browsers:

1. Internet Explorer   **2. Google Chrome**   **3. Mozilla FireFox**

2.2.2   Network / Group Policies

Company Group and Network policies might block traffic. This will cause the offline application not to function correctly. Please communicate the below to your IT department

When logging to the offline app, the system connects to the database for authentication purposes through a **web service** that's residing on http://indicium.CATHSSETA.org.za/WSPATRService/WSPOffline.asmx

Traffic should be permitted to move through the above URL, port 80 and 443.
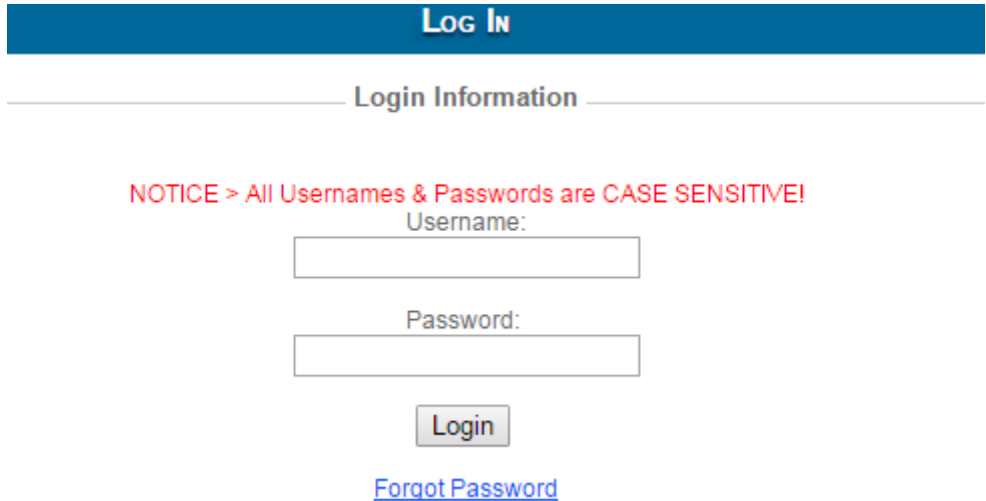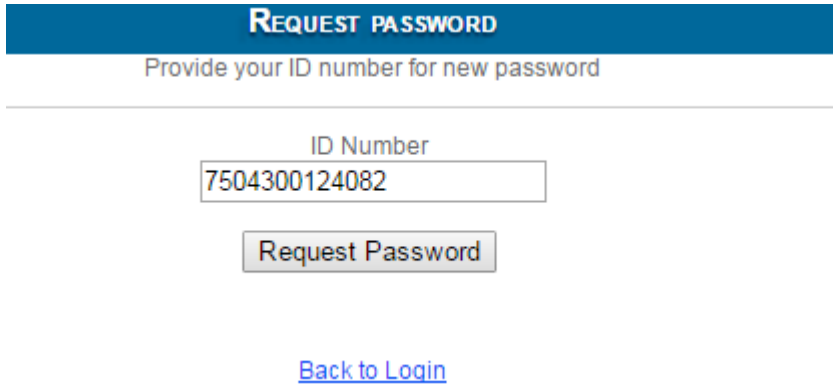
Hardware Requirements

Minimum requirements for hardware are as follows

- Windows 7 or above
- Service Pack 1
- Intel Celeron minimum but Core i-3 or better suggested
- 2GB RAM minimum but 4GB suggested
- At least 20GB free hard drive space
- Microsoft Office
- Adobe PDF reader
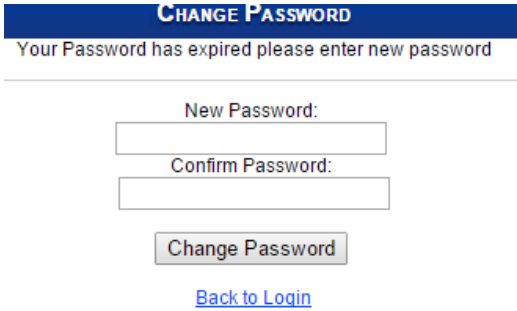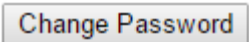- ADSL or 3G. Dial-up lines are not recommended.

2.2.3   Forgotten Password

Once the SDF is registered on the system, it is possible to forget one's password therefore Indicium has an online 'Forgot Password' functionality. Please follow the following steps if you have forgotten your password.

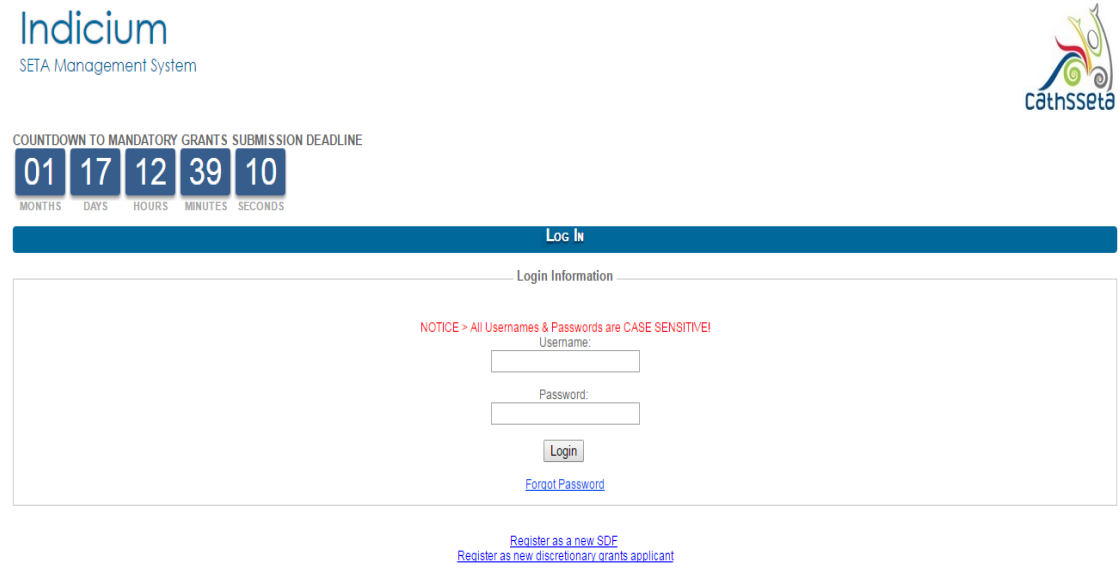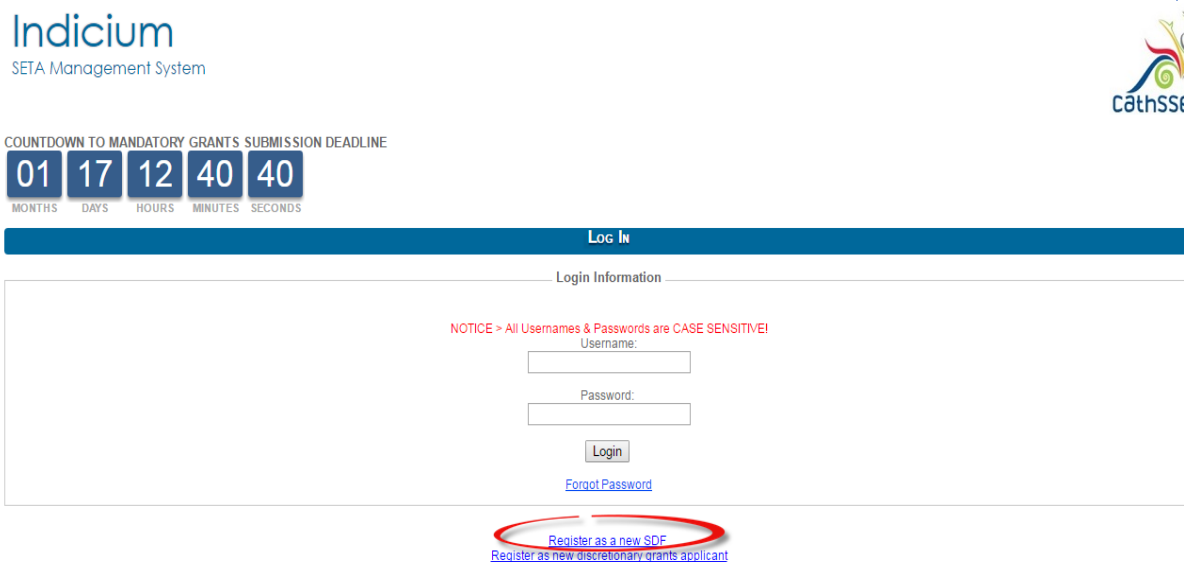| Step	Action / Screenshot
1	The SDF navigates to the CATHSSETA Indicium Seta Management System page. **Log In** Login Information NOTICE > All Usernames & Passwords are CASE SENSITIVE! Username: Password: [Login] Forgot Password
2	The SDF clicks on the **Forgot Password** link. The SDF capture the ID number **REQUEST PASSWORD** Provide your ID number for new password ID Number 7504300124082 [Request Password] Back to Login Please do not copy and paste the ID number. The ID number must be typed in.
3	Indicium will send an email with the **username** and **temporary** password. Use these details as on the logon page.
3	Indicium will revert the **Change Password** page for the SDF to update the password to a new

Step	Action / Screenshot
	password.

CHANGE PASSWORD
Your Password has expired please enter new password

New Password:

Confirm Password:

Change Password

Back to Login

Please note the following rules on Creating of Passwords:

#	Rule
1	The **length** of the password must be at least **8 characters** long
2	Your password must contain one **capital/upper case letter**
3	Your password must at least contain **one digit number**
4	Your password must at least contain a **symbol** "{*&%$#@
5	The password expires after 30 days, and the SDF will be required to enter a **new** password – each 30 days.

The SDF then clicks on the **Change Password** button to save the password. Indicium will navigate to the logon screen once the password has been successfully changed.

Change Password |
| **4** | Indicium will send the SDF an e-mail notification upon successful changing of passwords. Please ensure that you provide the correct e-mail address. |

3 SDF Registration

This section outlines the registration steps to be followed by the SDF.

Step	Action / Screenshot
1	The SDF navigates to the CATHSSETA Indicium Seta Management System page.
2	The SDF selects the **Register as new SDF** option at the bottom of this page.
3	Indicium opens the pop-up Registration window.

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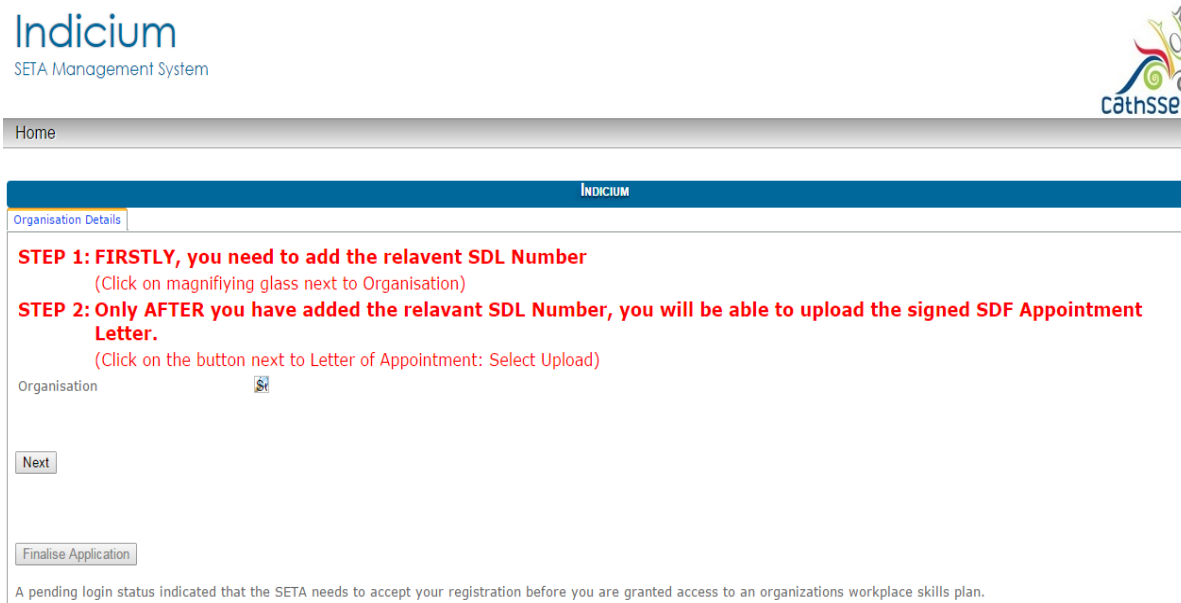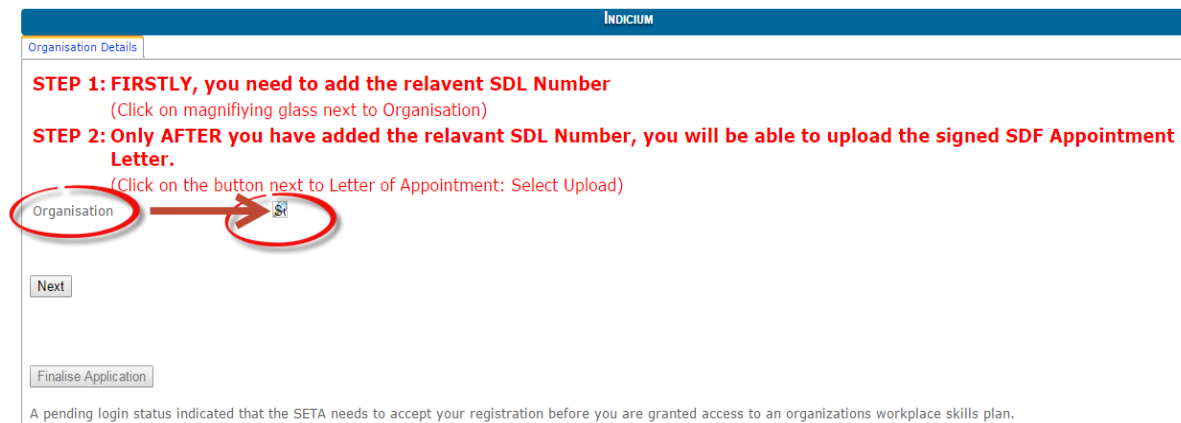| Step	Action / Screenshot
	The SDF has **two** options:
	i. *Cancel* – click on the **Cancel** button to cancel the registration process and return to the logon screen.
	ii. *Register* – click on the **Register** button to continue with the registration process after selecting from the option to register as a Primary or Secondary SDF.
4	Indicium opens the **Applicant Details** form for the SDF to complete.
	Please note the following rules on this screen:

Field	Rule
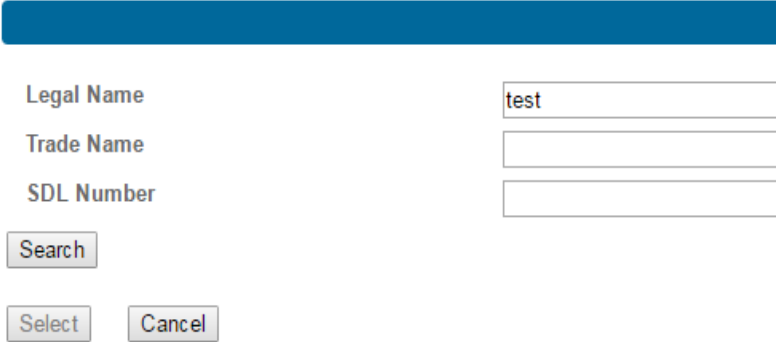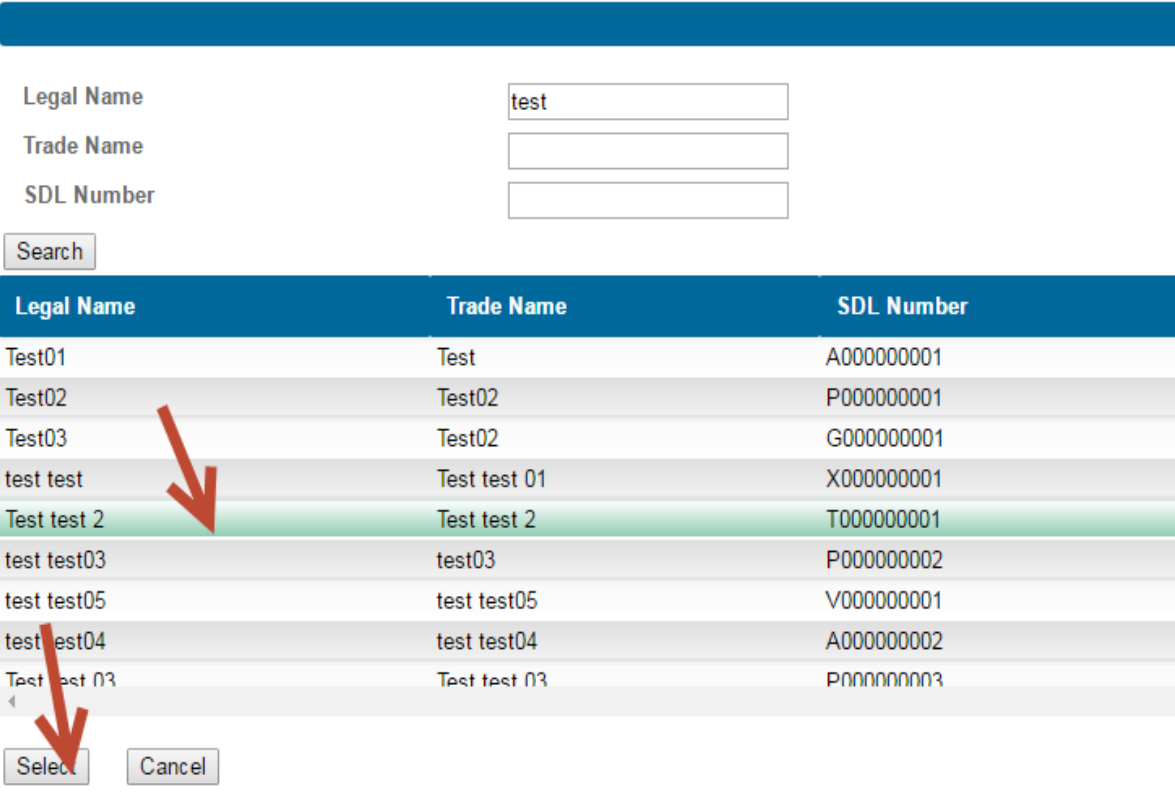
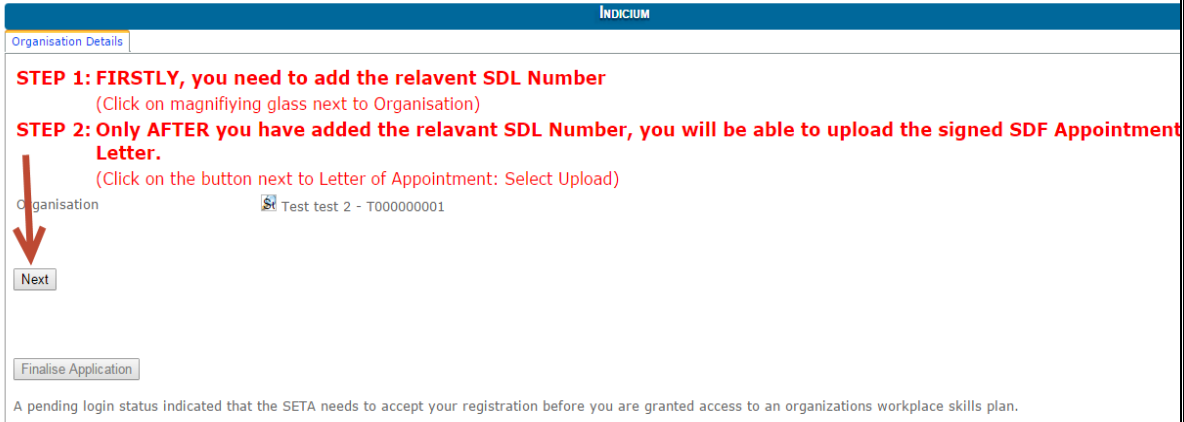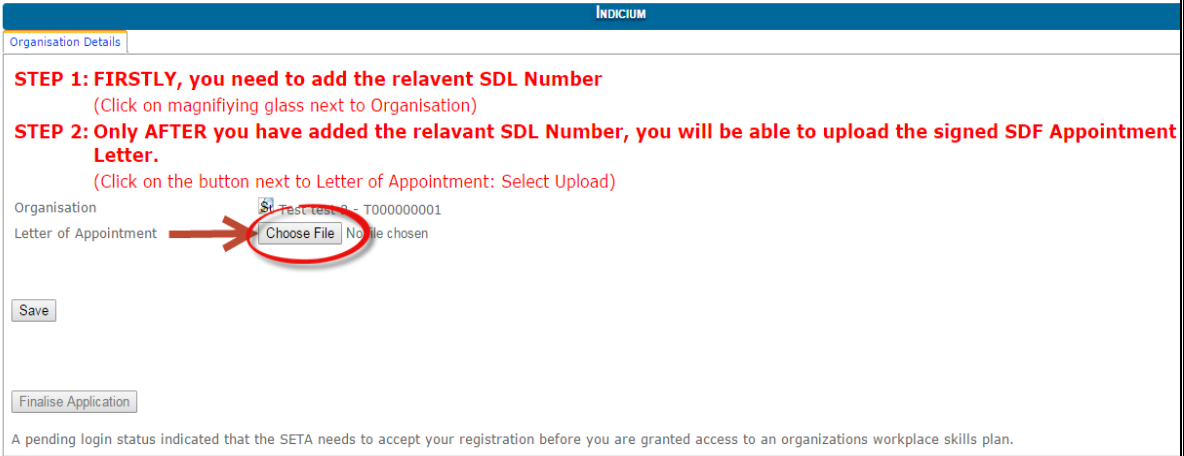| Step	Action / Screenshot	
	ID NO	A South African ID Number must have 13 digits. Indicium uses the Department of Home Affairs rules to validate that the number you entered is a **valid** SA ID Number. This field is also used to identify persons with no South African ID. Therefore you can add your passport number, or any other number that you are using for identification in this field. Indicium will not allow duplicate ID's, therefore if you are registered already Indicium will not allow you to register again with the same ID No.
	Alternate ID Type	The SDF will use this field to indicate the type of number that was entered in the ID No field where the number in the ID NO field is not a valid SA ID Nr.
	Title	Indicium will populate this field where the ID No is a valid SA No. However, the SDF can update as well. Indicium will not populate this field where the ID No is another type of number and the SDF will need to update this field.
	Initials	This is a populated field where Indicium will populate the field with the first letter of the First Name
	Date of Birth	Indicium will populate this field where the ID No is a valid SA No Indicium will **not** populate this field where the ID No is another type of number and the SDF will need to update this field.
	Gender	Indicium will populate this field where the ID No is a valid SA No Indicium will **not** populate this field where the ID No is another type of number and the SDF will need to update this field.
	Telephone Number	This number must be 10 characters, NO spaces
	Cell Phone Number	This number must be 10 characters, NO spaces
	Fax Number	This number must be 10 characters, NO spaces
	Physical / Postal code	Indicium will populate the following field when a valid Code is entered: • Municipality • Urban Rural • Province
	Use Physical Address for Postal Address	Select this box when the Physical and Postal Addresses are the same. Indicium will then copy the Physical Address to the Postal Address so that the SDF does not need to capture the information gain.
	SDF Type	When the SDF select **Other (Please specify)** from the **SDF Type** field, Indicium will validate that the SDF enters a value in the **SDF Type Other** field.
5	The SDF click's on the **Save and Proceed** button to submit the information captured.	

Step	Action / Screenshot
	Save and Proceed
6	Indicium will direct the SDF to the following screen.
7	Step 1 – The SDF needs to link themselves to an SDL number. Click on the Magnifying glass next to the Organisation.
8	The following screen will display:

Step	Action / Screenshot
	Legal Name test **Trade Name** **SDL Number** Search Select Cancel
9	Type in the Search Criteria for Legal Name OR Trade Name OR SDL number. Thereafter click on search.
10	The system will return all Entity's with the search criteria.
11	To select the correct company, please clock anywhere in the row – The row will turn Green in color once selected. Then click on select. **Legal Name** test **Trade Name** **SDL Number** Search | Legal Name	Trade Name	SDL Number
---	---	---
Test01	Test	A000000001
Test02	Test02	P000000001
Test03	Test02	G000000001
test test	Test test 01	X000000001
Test test 2	Test test 2	T000000001
test test03	test03	P000000002
test test05	test test05	V000000001
test test04	test test04	A000000002
Test test 03	Test test 03	P000000003	 Select Cancel
12	Once the company is linked to the SDF – Click on Next
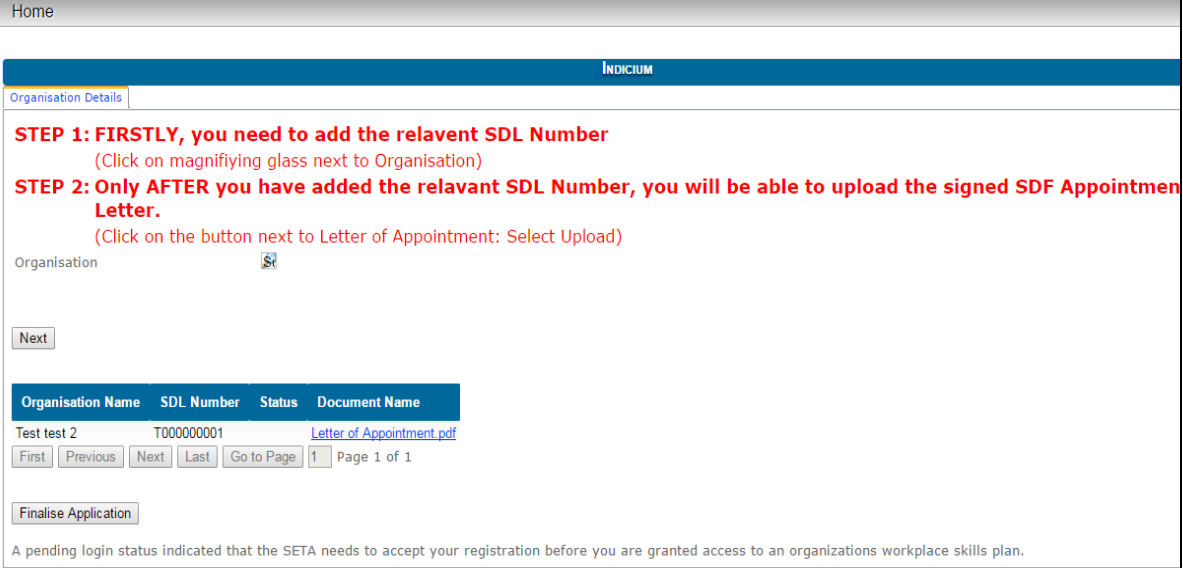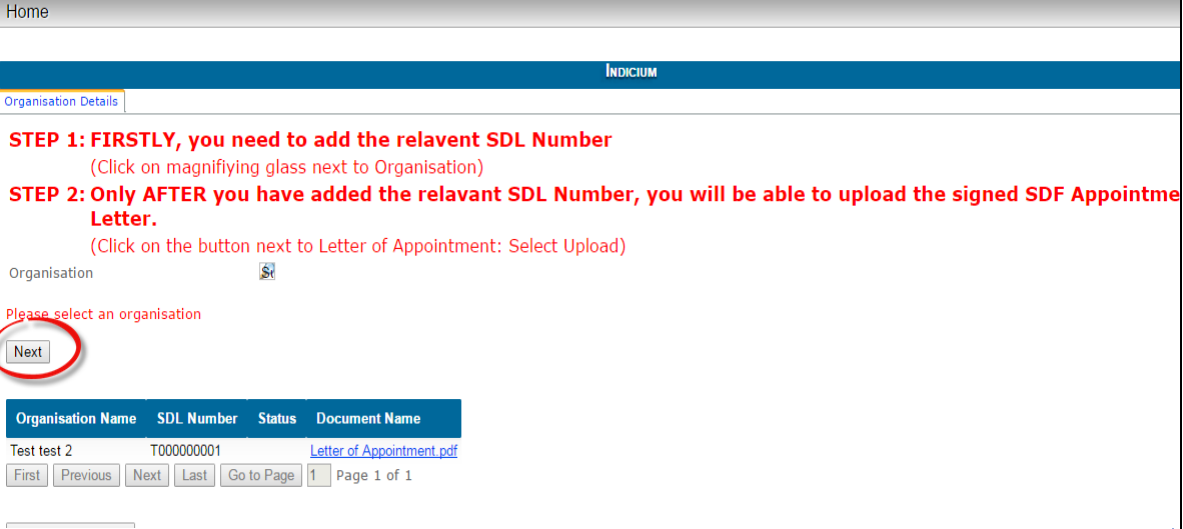
Step	Action / Screenshot

13	Step 2 – Upload Letter of Appointment. Click on the Choose File Button

14	Direct to the uploaded PDF in your directory and then click on Open.

Step	Action / Screenshot
15	The uploaded PDF will turn Green in color – Then click on save
16	The below screen will display

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Step	Action / Screenshot
17	If the SDF wants to link themselves to another Company click on the Next Button.
18	Follow the same steps as per point 7 to link to another company.
19	If the SDF requires to be linked to only one company, click on the **Finalise Application** Button

Step	Action / Screenshot

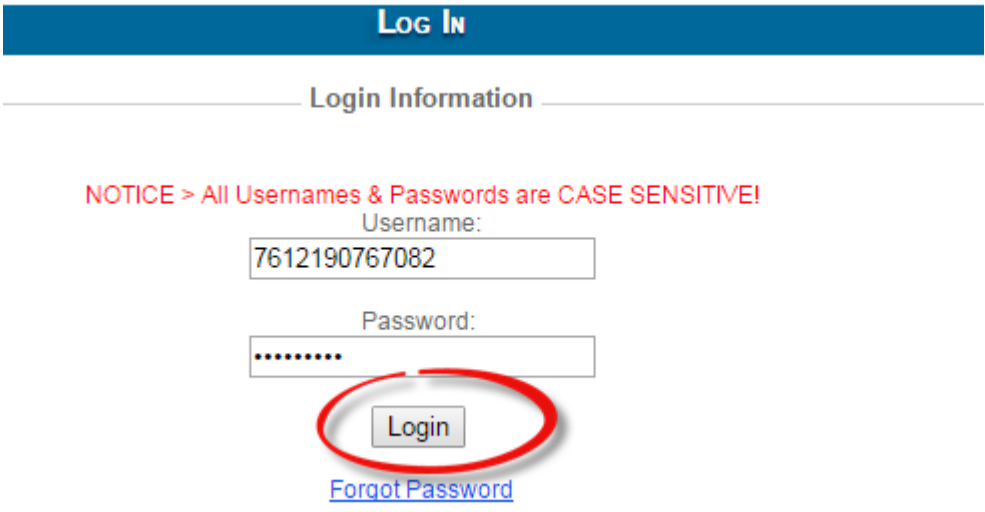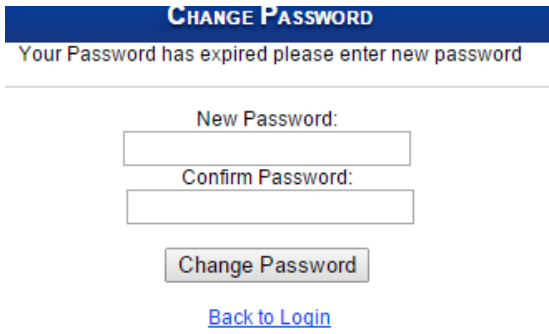| 20	Please note: A pending login status indicated that the SETA needs to accept your registration before you are granted access to an organizations workplace skills plan
21	Once the application is finalised the SF will be directed back to the login page.
22	An automated e-mail will be send to the SDF Mon 13/03/2017 01:24 PM WSPno-reply@Cathsseta.co.za Acknowledgment of Skills Development Facilitator Registration To Adele van Brakel 13/03/2017 SDF Registration for Adele van Brakel ID:7612190767082 **SDF Role:Primary** Dear Adele van Brakel Company Name: **Test test 2** SDL No: **T000000001** Herewith confirmation that we have received your SDF registration for the above mentioned organization. We will attend to this request shortly. Your username and password is: **Username:** 7612190767082 **Password:** van Brakel Kindly note that you will be required to change your password once logged in.
23	An automated e-mail will also be sent to Cathsseta to evaluate the application.

Step	Action / Screenshot

Mon 13/03/2017 01:24 PM

WSPno-reply@Cathsseta.co.za

Notification of Skills Development Facilitator Registration

To   Adele van Brakel; Phemelo Mothusi; nomhle@cathsseta.org.za; Tebogo@cathsseta.org.za; thabang@cathsseta.org.za

Please be advised that an SDF application has been submitted and awaits evaluation.

Adele van Brakel

7612190767082

Test test 2

T000000001

Step	Action / Screenshot
22	Upon successful evaluation the SDF will be informed via e-mail of the application.
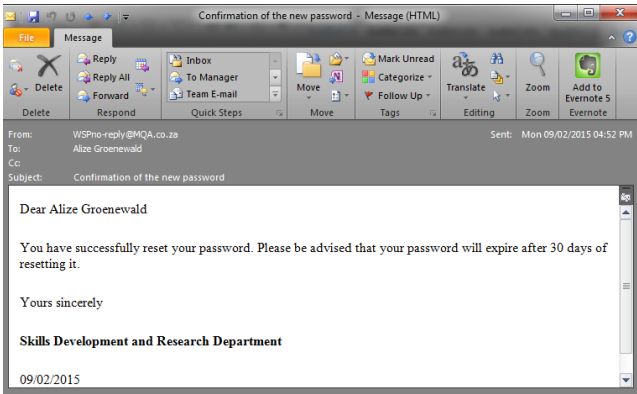
3.1   SDF First Login

The SDF is required to change the password upon first login, in order to do this, the following steps are to be followed

Step	Action / Screenshot
1	The SDF navigates to the CATHSSETA Indicium Seta Management System page.
2	The SDF enters the username and password that is sent in the **acknowledgement and skills development facilitator** email, received upon the submission of registration. Your username and password is: **Username:** 7612190767082 **Password:** van Brakel **Note** the username will remain the same but the SDF will need to change his/her password after a period of time.
3	The Indicium usernames and passwords are case sensitive! The SDF needs to click on the **Login** button once the **Username** and **Password** is entered.
4	The SDF needs to enter a **NEW** Password, and **CONFIRM** the password.

Step	Action / Screenshot
	Please note the following rules for creating passwords:

#	Rule
1	The **length** of the password must be at least **8 characters** long
2	Your password must contain one **capital/upper case letter**
3	Your password must at least contain **one digit number**
4	Your password must at least contain a **symbol** "{*&%$#@
5	The password expires after 30 days, and the SDF will be required to enter a **new** password – each 30 days.

The SDF then clicks on the **Change Password** button in order to save the password. Indicium will navigate to the logon screen once the password has been successfully changed.

Step	Action / Screenshot
5	Indicium will send the SDF an e-mail notification upon successful changing of passwords.

3.2 Register Organisation on SDF Profile

The SDF must now register on his/ her profile, the organisations he/she required to access. In order to do this the following steps must be followed.

Note: The below steps can be followed in order to link all the required organisations to the SDF's profile

Step	Action / Screenshot
1	The SDF navigates to the CATHSSETA Indicium Seta Management System page and enter your login details and click on **Login.**
2	The SDF enters the generated **Username** and **New Password**, and then proceeds to clicking on the **Login** button.
3	Indicium reverts to the Skills dashboard

Step	Action / Screenshot

4	The SDF clicks on the **Skills** menu option.

5	Indicium opens the page with two options: • Organisation • SDF

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Step	Action / Screenshot

Note: To change the view of this screen in order to display these options at the top, simply click on the black button showcasing a white arrow.

6	The SDF must click on the **SDF** menu option.

7	Search for the SDF details by completing one of the filters on the page which opens on the right side of the screen. Once a filter is completed, click on the **Search** button

8	Indicium will return the SDF details.
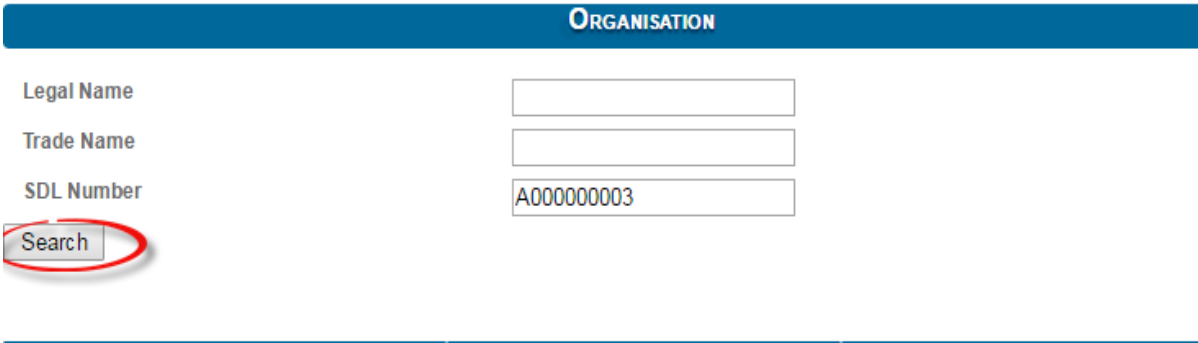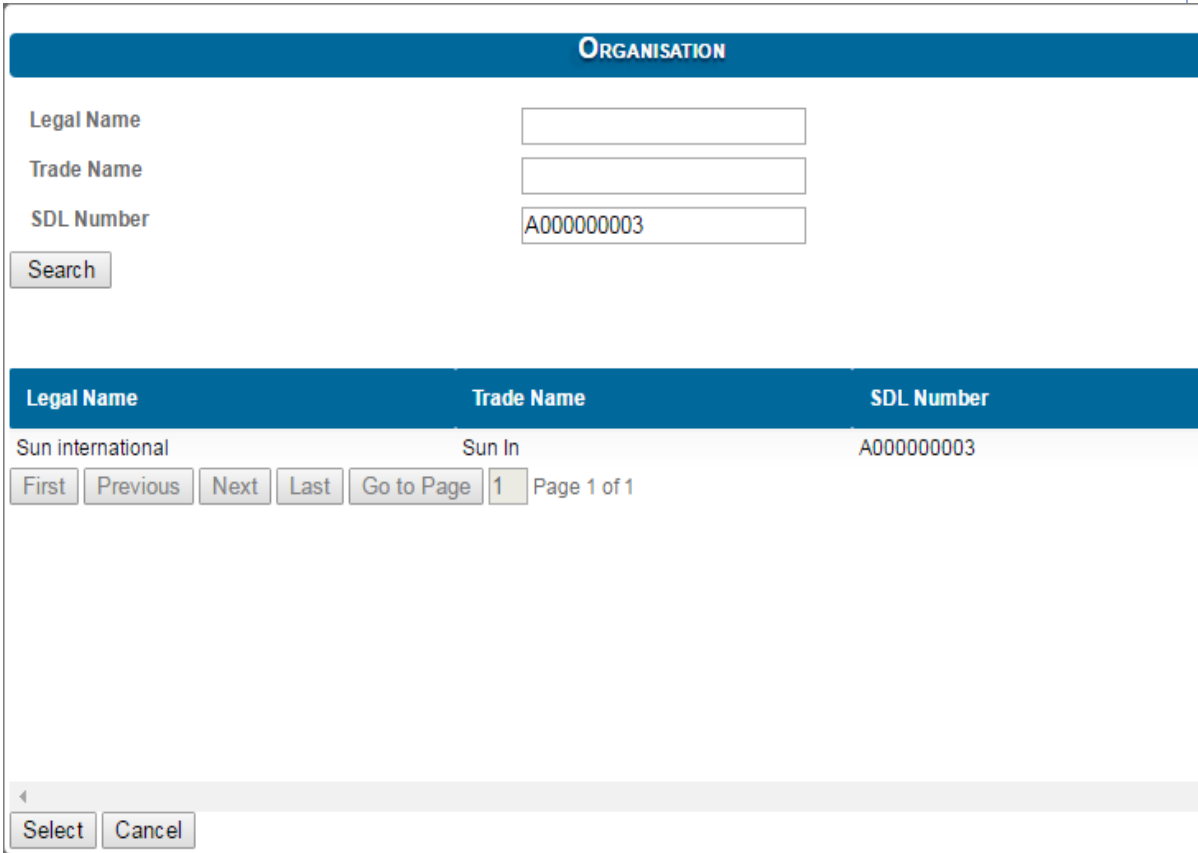
Step	Action / Screenshot

9	To access the SDF, select the row and then click on the **Action** button.

10	Indicium opens a page with the SDF's personal details. This page allows for the updating of any personal details. To enable the fields, click on the **Edit** button.

11	The SDF must select the **Organisation Details** option from the menu.

Step	Action / Screenshot

12	Indicium will open a page on the right hand side allowing the SDF to search for the organisations required.

13	The SDF clicks on the magnifying glass to open the **Organisation** search screen.

The SDF searches for the Organisation in order to link to this profile by adding the L number of the organisation in the **SDL Number** field and then clicks on the **Search** screen.

Step	Action / Screenshot
	ORGANISATION Legal Name _____ Trade Name _____ SDL Number A000000003 Search
14	Indicium returns the results for the criteria used. **ORGANISATION** Legal Name _____ Trade Name _____ SDL Number A000000003 Search | Legal Name	Trade Name	SDL Number
Sun international	Sun In	A000000003	 First Previous Next Last Go to Page 1 Page 1 of 1 Select Cancel The SDF will select the organisation by clicking once on the name.

Step	Action / Screenshot

ORGANISATION

Legal Name	
Trade Name	
SDL Number	A000000003

Search

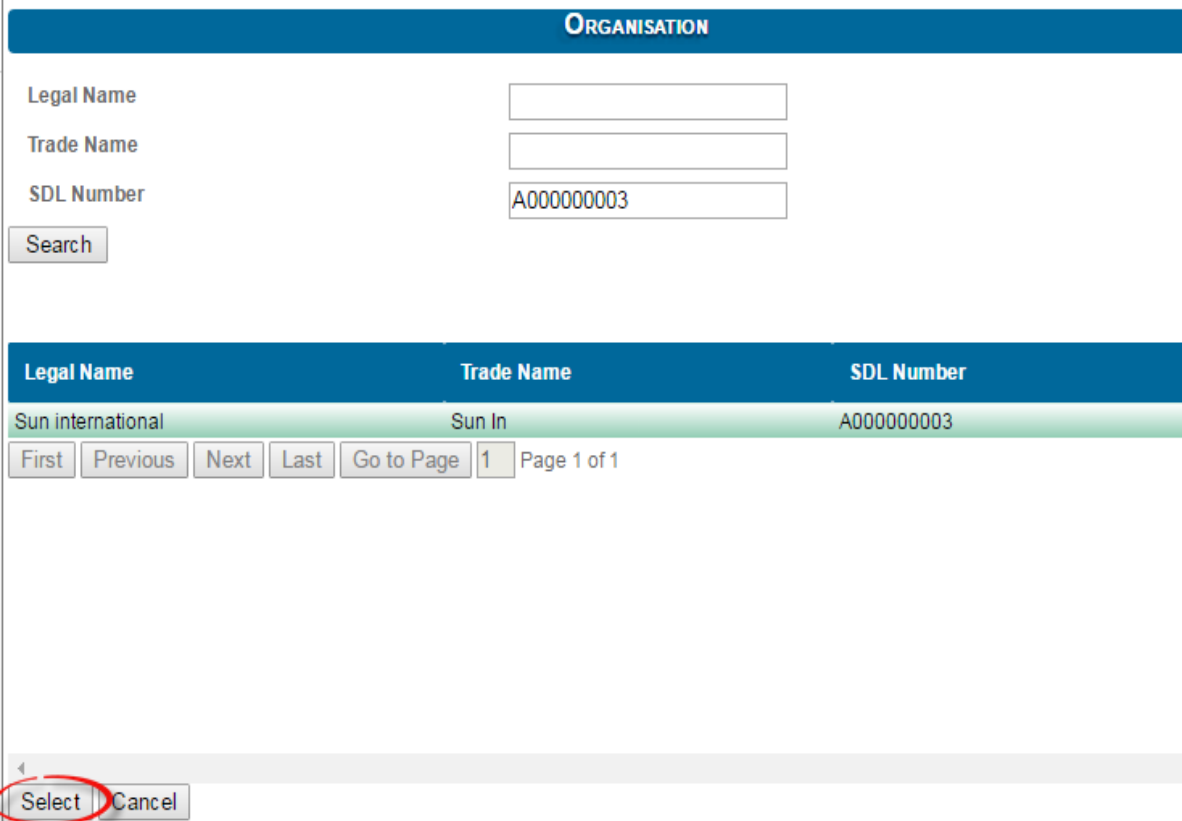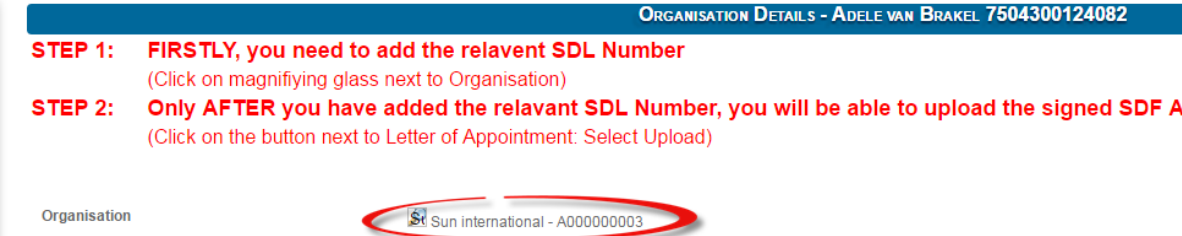| Legal Name	Trade Name	SDL Number
Sun international	Sun In	A000000003

First | Previous | Next | Last | Go to Page | 1 | Page 1 of 1

Select | Cancel

(Indicium will highlight the organisation in green).
Once the row has turned green, click on the Select button.

Step	Action / Screenshot

ORGANISATION

Legal Name

Trade Name

SDL Number   A000000003

Search

Legal Name	Trade Name	SDL Number
Sun international	Sun In	A000000003

First | Previous | Next | Last | Go to Page | 1 | Page 1 of 1

Select | Cancel

| **15** | Indicium adds the details of the organisation in the **Organisation** field. |

ORGANISATION DETAILS - ADELE VAN BRAKEL 7504300124082

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 Ap
(Click on the button next to Letter of Appointment: Select Upload)

Organisation   St Sun international - A000000003

| **16** | The SDF needs to upload the **Letter of Appointment** by clicking on the **Choose File** button. |

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Step	Action / Screenshot

ORGANISATION DETAILS - ADELE VAN BRAKEL 7504300124082

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**
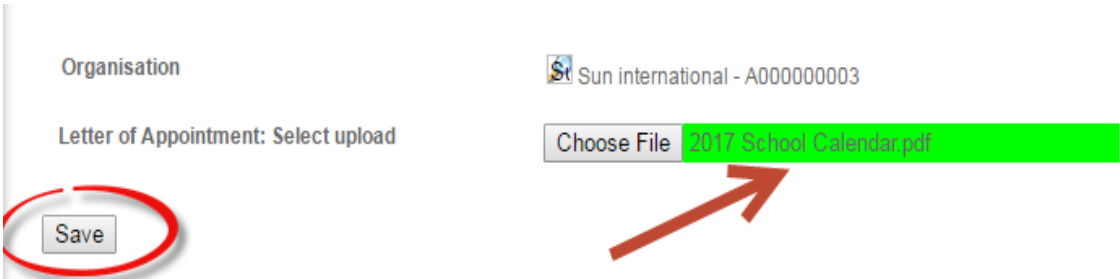(Click on the button next to Letter of Appointment: Select Upload)

Organisation   St Sun international - A000000003

Letter of Appointment: Select upload   [Choose File] No file chosen

---

17   The SDF will select the **signed Letter of Intent** from the location where it is saved and clicks on the **Open** button to link it to the Organisation.

---
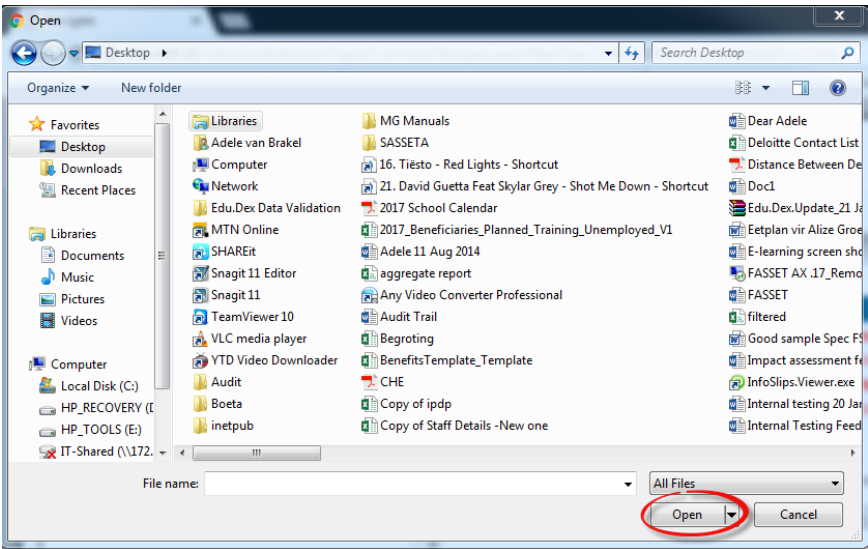
18   A successful upload shows a **green** upload line, a **red** line will be displayed if Indicium did not successfully uploaded the letter. The SDF then clicks on the **Save** button to complete the process.

Organisation   St Sun international - A000000003

Letter of Appointment: Select upload   [Choose File] 2017 School Calendar.pdf

[Save]

---
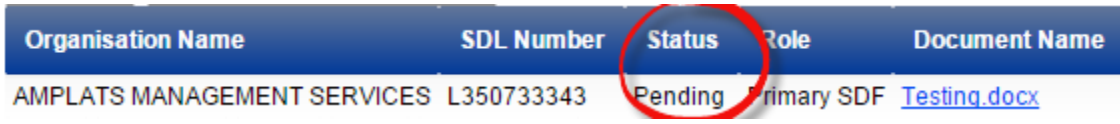
19   Indicium will link the organisation to the SDF, displaying the details as follows:

Organisation Name	SDL Number	Status	Document Name
Sun International Management Ltd	V000000002	Rejected	AuthorisationPageSmall.pdf
Sun international	A000000003	Approved	AuthorisationPageSmall.pdf

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Step	Action / Screenshot

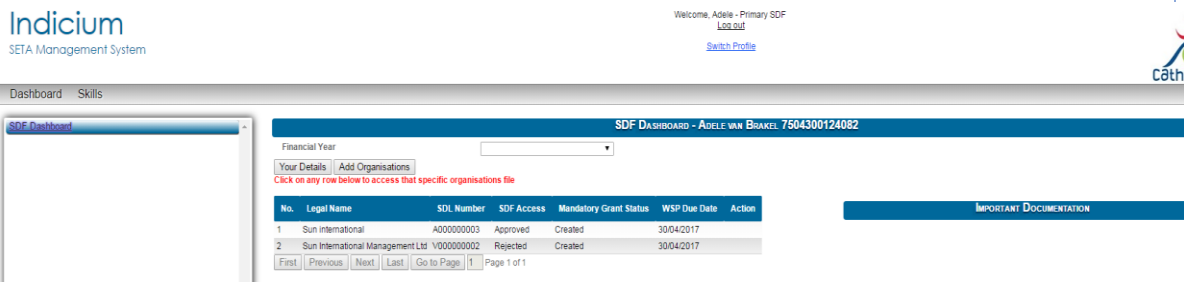| **20** | The **Status** of the SDF for the organisations linked, will show **Pending** until the SDF has completed the updates on the organisation and uploads the letter of Appoinment. This will be discussed further in this document. |

Organisation Name	SDL Number	Status	Role	Document Name
AMPLATS MANAGEMENT SERVICES	L350733343	Pending	Primary SDF	Testing.docx

3.3 Update Organisation Profile

Once the SDF linked the Organisation to the SDF profile, the SDF needs to ensure that the Organisation is updated correctly. This section will guide the SDF on the sections that need to be updated and the steps necessary to ensure that updates are done.

3.3.1 Organisation Details
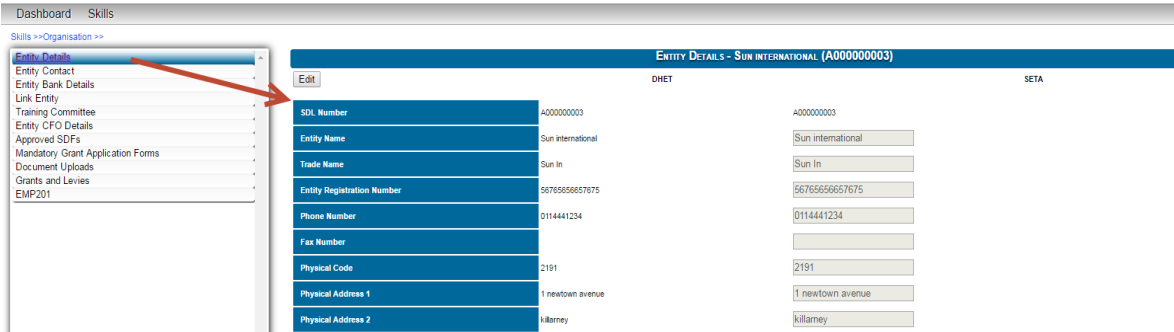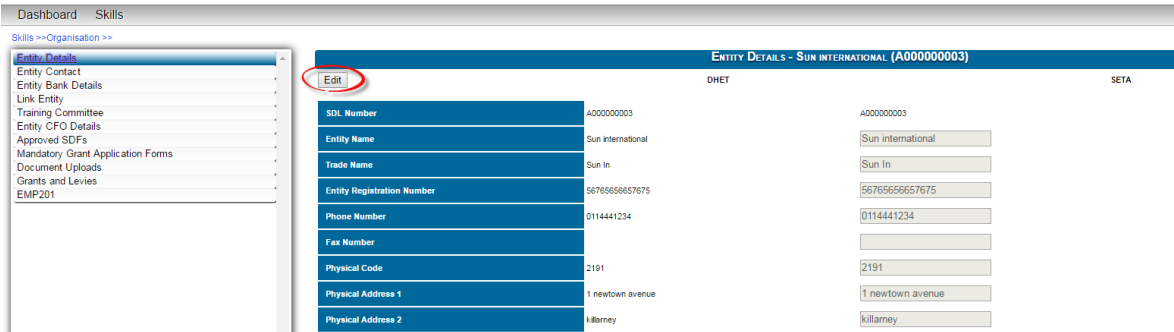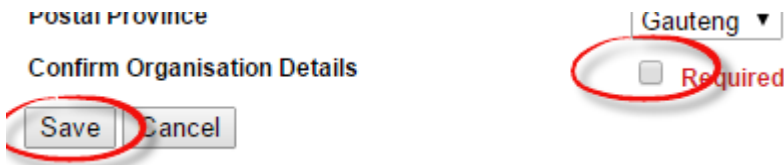
The SDF needs to ensure and confirm that the Organisation details are up to date.

Step	Action / Screenshot
1	The SDF navigates to the CATHSSETA Indicium Seta Management System page, enters his/her login details and clicks on **Login.**
2	Indicium reverts to the Skills dashboard.
3	The SDF clicks on the **Skills** menu option.

St ep	Action / Screenshot
4	The SDF must click on the **Organisation** menu option.
5	Indicium will open a form on the right hand side of the screen, allowing the SDF to search for the organisation, completing one of the filters and clicking on the **Search** button. Alternatively, the filters can be left blank and the **Search** button can simply be clicked
6	Indicium will return the information according to the search criteria or will return all the organisations linked to the SDF in the event that the SDF searched without criteria.
7	To access the organisation details, select or highlight by clicking on the organisation name and then click on the **Action** button.
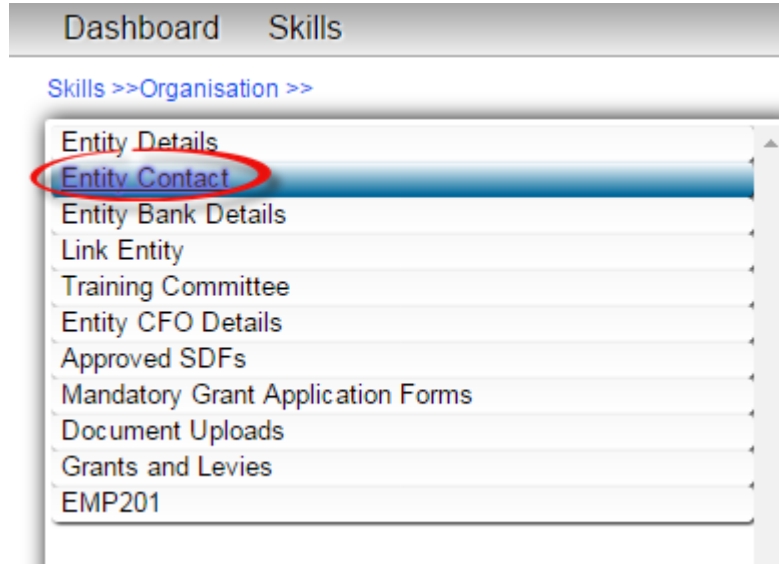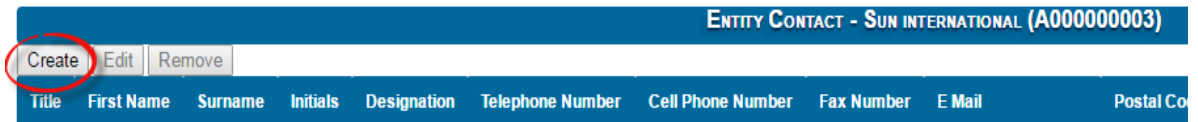
St ep	Action / Screenshot

8	Indicium opens the Entity profile, on the **Entity Details** screen.

9	To edit or update the entity details the SDF will click the **Edit** button for Indicium to enable the fields for editing.

10	The SDF must check / update the Entity details ensuring that all details are correct. Once the SDF checks this information, the SDF is required to confirm that the details are correct by selecting the tick box called **Confirm Organisation Details** and then clicking on the **Save** button to save the information.
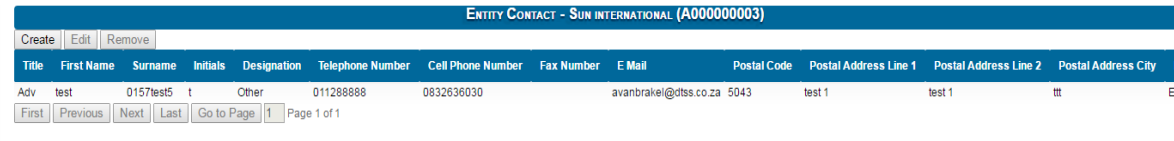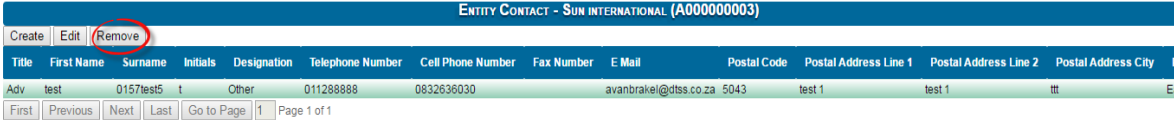
3.3.2   Organisation Contact Person Details

The SDF needs to ensure and confirm that the Organisation Details are up to date.

Step	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	To add or edit or remove the **Entity Contact,** the SDF will click on the **Entity Contact** menu option.

3	To **Create** a new contact, the SDF will click on the **Create** button.

4	Indicium will open the **Create Entity Contact** screen. The SDF must complete the fields and click on the **Save** button to save the contact captured.
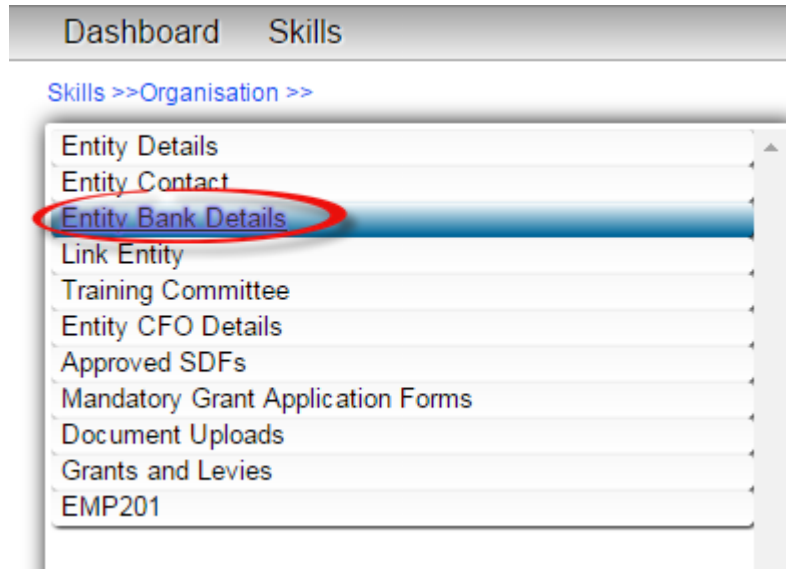
Ste p	Action / Screenshot

CREATE ENTITY CONTACT

Title	▼
First Name	
Surname	
Initials	
Designation	▼
Telephone Number	
Cell Phone Number	
Fax Number	
E Mail	
Postal Code	
Postal Address Line 1	
Postal Address Line 2	
Postal Address City	
Province	▼

Save   Cancel

5	Indicium saves the information on the **Entity Contact** screen.

ENTITY CONTACT - SUN INTERNATIONAL (A000000003)

Create | Edit | Remove

Title	First Name	Surname	Initials	Designation	Telephone Number	Cell Phone Number	Fax Number	E Mail	Postal Code	Postal Address Line 1	Postal Address Line 2	Postal Address City	P
Adv	test	0157test5	t	Other	011288888	0832636030		avanbrakel@dtss.co.za	5043	test 1	test 1	ttt	Ea

First | Previous | Next | Last | Go to Page 1 | Page 1 of 1

6	To **Edit** the specific contact details, select the contact from the list and click on the **Edit** button to open the contact details page. Update the details required and click on the **Save** button.

ENTITY CONTACT - SUN INTERNATIONAL (A000000003)

Create | Edit | Remove

Title	First Name	Surname	Initials	Designation	Telephone Number	Cell Phone Number	Fax Number	E Mail	Postal Code	Postal Address Line 1	Postal Address Line 2	Postal Address City
Adv	test	0157test5	t	Other	011288888	0832636030		avanbrakel@dtss.co.za	5043	test 1	test 1	ttt

First | Previous | Next | Last | Go to Page | Page 1 of 1

7	To **Remove** the specific contact details, select the contact from the list and click on the **Remove** button to remove the contact from the contact details page.
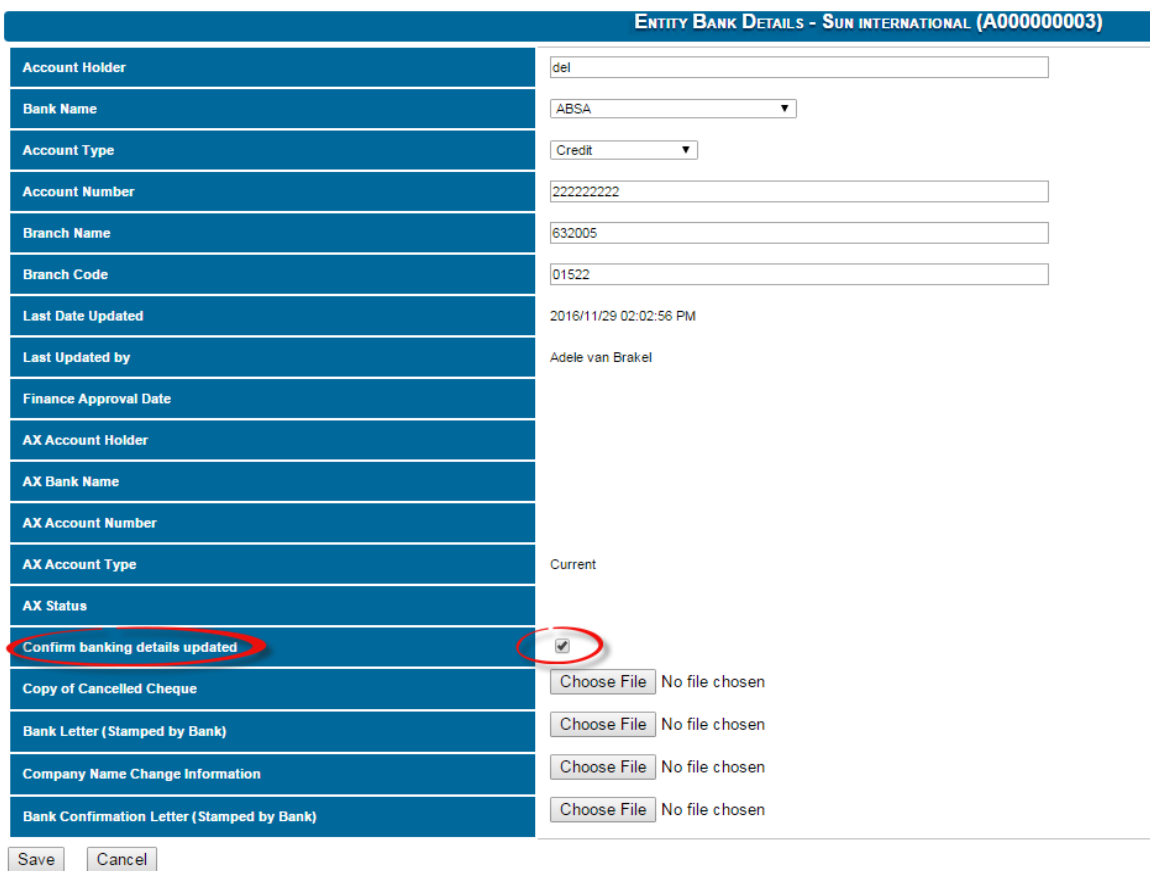
ENTITY CONTACT - SUN INTERNATIONAL (A000000003)

Create | Edit | Remove

Title	First Name	Surname	Initials	Designation	Telephone Number	Cell Phone Number	Fax Number	E Mail	Postal Code	Postal Address Line 1	Postal Address Line 2	Postal Address City	P
Adv	test	0157test5	t	Other	011288888	0832636030		avanbrakel@dtss.co.za	5043	test 1	test 1	ttt	Ea

First | Previous | Next | Last | Go to Page 1 | Page 1 of 1

3.3.3　Entity Bank Details

The SDF needs to validate the banking details currently on the CATHSSETA records.

Ste p	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	To **validate** the **Entity Bank Details** the SDF will click on the **Entity Bank Details** menu option.
3	The SDF needs to ensure that the details reflected on Indicium is correct as this will have an impact on the Grant Payments. The SDF needs to confirm that the banking details are correct.

Ste p	Action / Screenshot

3.3.4   Linking Child Entity

The SDF needs to ensure that all the Child Companies are linked (if applicable).

Ste p	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	To **link** the **Child Organisation Bank** to the organisation (Parent Organisation), the SDF will click on the **Link Entity** menu option.

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Step	Action / Screenshot
	 Dashboard Skills Skills >>Organisation >> Entity Details Entity Contact Entity Bank Details Link Entity Training Committee Entity CFO Details Approved SDFs Mandatory Grant Application Forms Document Uploads Grants and Levies EMP201
3	Indicium will open the window for the SDF to search for the company that is required to be linked to the SDF. The SDF will complete one of the search criteria's and click on the **Search** button for Indicium to return the information. Legal Name Trade Name SDL Number L210740595 Search
4	Indicium will return the results as per the search criteria. The SDF will select the company by ticking the **Select** tick box and clicking on the **Link Entity** button. Legal Name Trade Name SDL Number L210740595 Search | Select	Legal Name	Trade Name	SDL Number
---	---	---	---
☑	HYDROSOL PLATINUM TECHNOLOGIES	HYDROSOL PLATINUM TECHNOLOGIES	L210740595	 Link Child Organisations Cancel
6	Indicium will link the organisation selected in step 5 to the Main (Parent) Organisation.
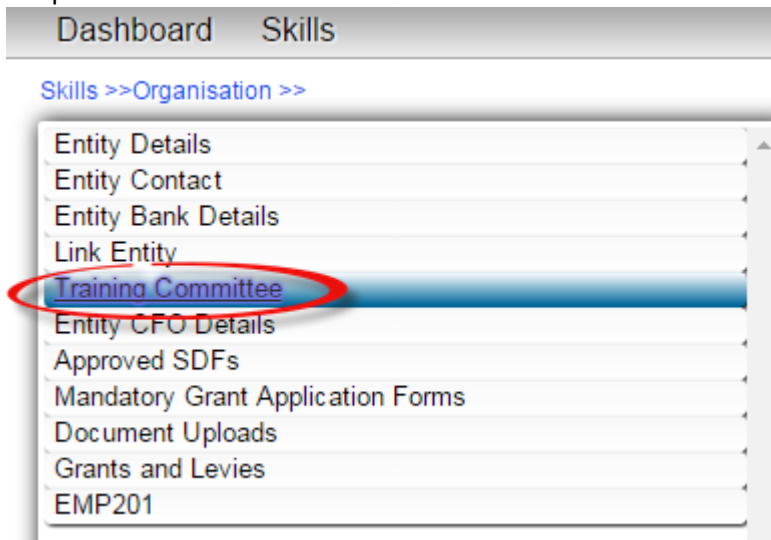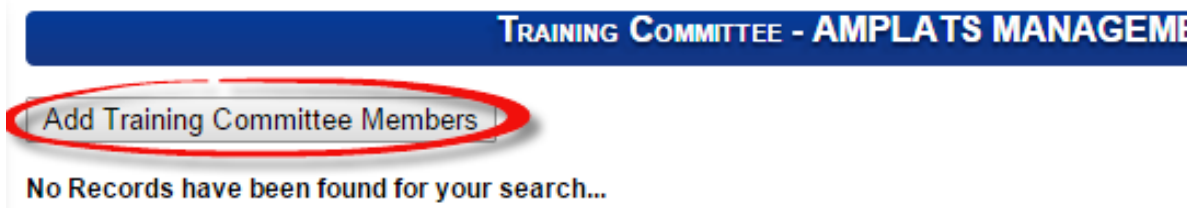
Ste p	Action / Screenshot

7	To **View** the specific child organisation, select the organisation from the list and click on the **View Child** button to open the organisation details page of the child organisation.

8	To **Remove** the specific child organisation if incorrectly linked, select the organisation from the list and click on the **Remove** button.

3.3.5   Training Committee

The SDF is required to capture the details of the Training Committee Members where the number of employees in the organisation is more than 50.

Companies less than 49 employees do not have to complete this section.

Step	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	To add **Training Committee Members** to the organisation, the SDF will click on the **Training Committee** menu option.
3	The SDF will click on the **Add Training Committee Members** button to open the **Training Committee** window.
4	Indicium will open the **Training Committee** window for the SDF to capture the information. The SDF needs to click on the **Save** button to save the information captured.

Step	Action / Screenshot

Step	Action / Screenshot
5	Indicium will save the training committee member on the **Training Committee** page.
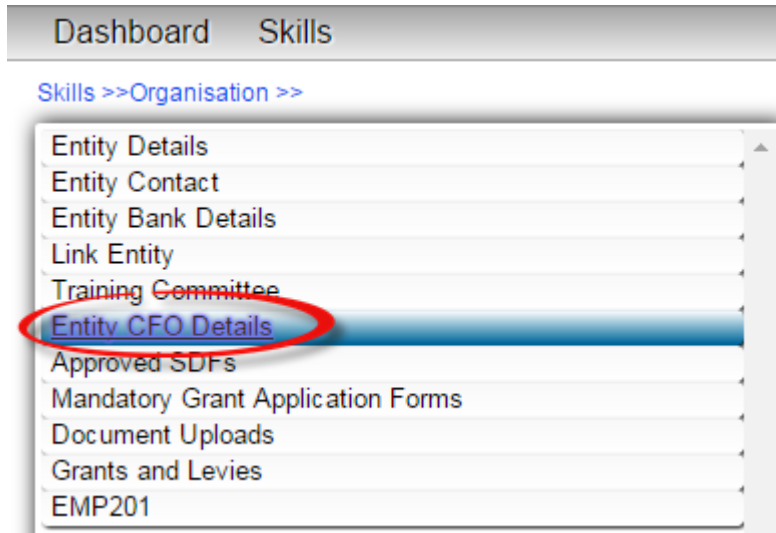
| 6 | To update the **Training Committee member,** the SDF will select the member and then click on the **Update** button to open the details of the member. The SDF must click on the **Save** button to save the details updated. |
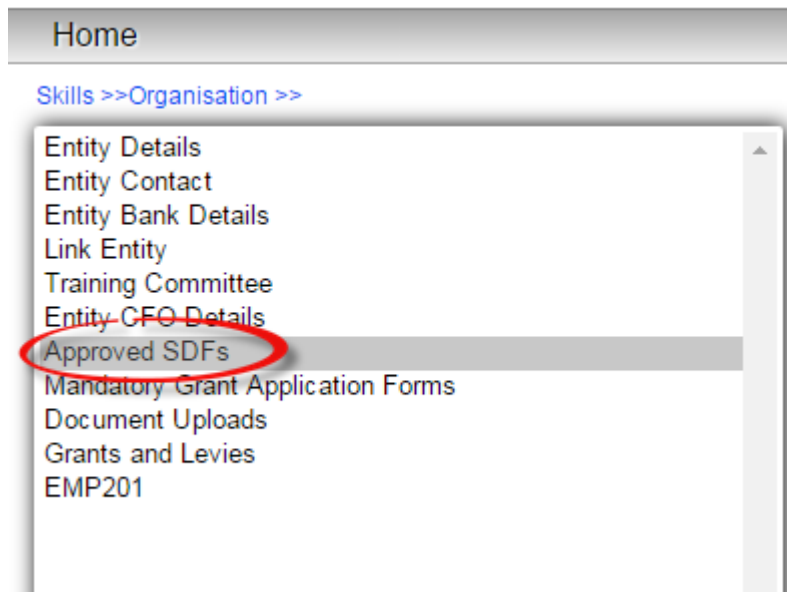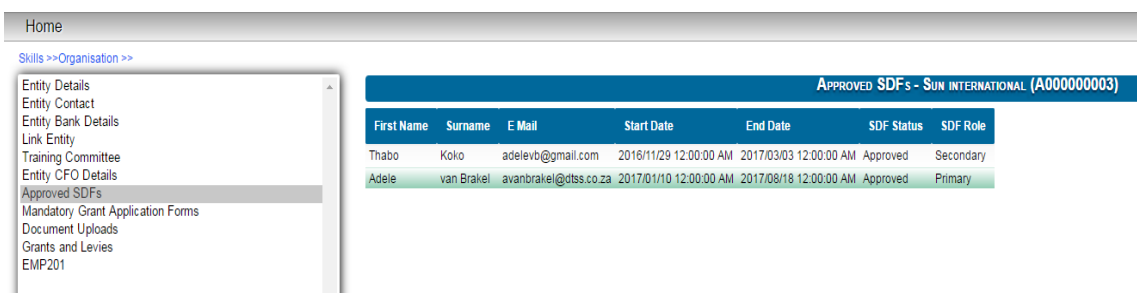
3.3.1   Entity CFO Details

Step	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	To add **CFO Details** to the organisation the SDF will click on the **Organisation CFO Details** menu option.

Step	Action / Screenshot
3	The SDF will click on the **Edit** button to enable the fields for editing.

Step	Action / Screenshot
4	The SDF must click on the **Save** button to save the details.

3.3.1   Approved SDF's

Step	Action / Screenshot

Step	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	To view the Approved SDF's click on Approved SDF's
3	The SDF will be able to view the Approved SDF"s link to this company.

4 Mandatory Grant Online Application Functionality

This section will guide the SDF in completing the Workplace Skills Plan (WSP) and Annual Training Report (ATR) with the use of the CATHSSETA Mandatory Grant Application Forms.
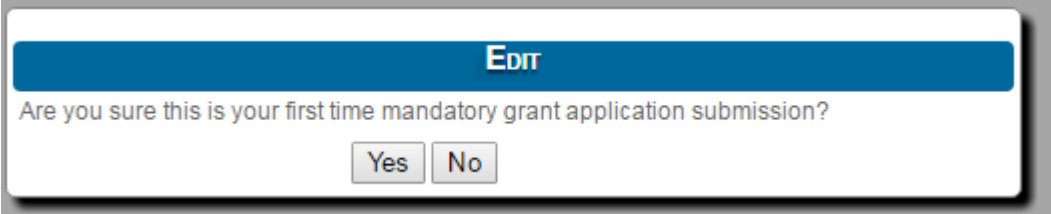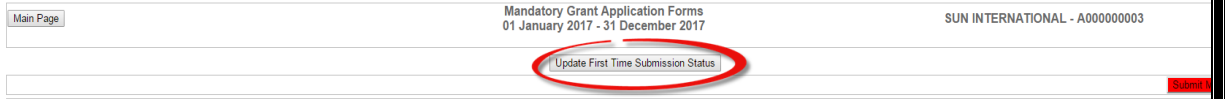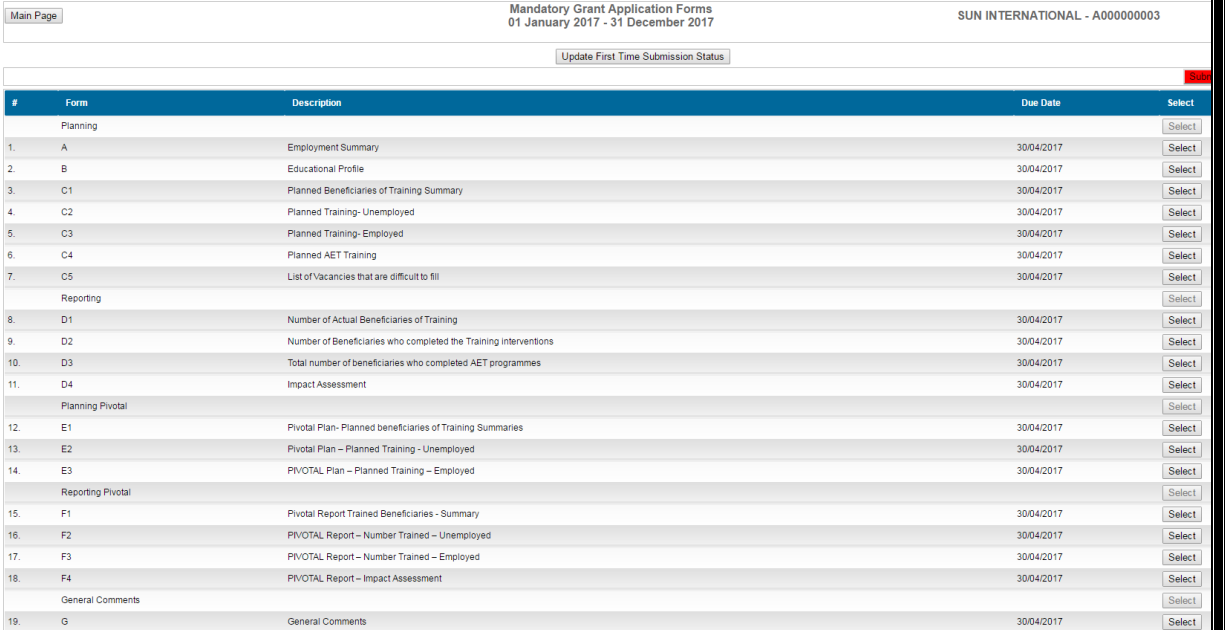
4.1 Mandatory Grant Application Forms

Step	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	Select the Mandatory Grant Application Forms
3	The section (Financial Year) is only active when a new form needs to be created for a new SDL year. Make sure that Entity details, Entity Contact, Entity bank details, Training Committee and Entity CFO details are confirmed before creating a new year.
4	Select the Financial Year form the dropdown
5	Then click on the Create button

Step	Action / Screenshot
	View Print Authorization Financial Year [_____ ▼] [Create]
6	A new row will be added for the new financial year. MANDATORY GRANT APPLICATION FORMS - SUN INTERNATIONAL (A000000003) View Print Authorization Financial Year [_____ ▼] [Create] | Skills Year	Form Type	Grant Status	Due Date	Status Date	Submission Date
---	---	---	---	---	---
01 April 2017 – 31 March 2018	Large	Created	30/04/2017	29/11/2016		 First Previous Next Last Go to Page [1] Page 1 of 1
7	To access the forms select the current financial year and click on view button: MANDATORY GRANT APPLICATION FORMS - SUN INTERNATIONAL (A... View Print Authorization Financial Year [_____ ▼] [Create] | Skills Year	Form Type	Grant Status	Due Date	Status Date	Submission Date
---	---	---	---	---	---
01 April 2017 – 31 March 2018	Large	Created	30/04/2017	29/11/2016		 First Previous Next Last Go to Page [1] Page 1 of 1
8	The following question will display: Dashboard Skills Main Page Mandatory Grant Application Forms 01 January 2017 - 31 December 2017 SUN INTERNATIONAL - A000000003 Is this your first time mandatory grant application submission [Yes ▼] [Save]
9	If selected Yes from the dropdown – The ATR section will be omitted to the application. If yes is selected, the following will display to confirm the selection.
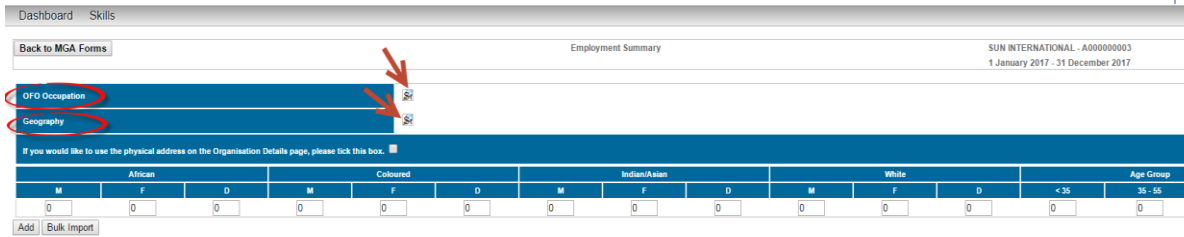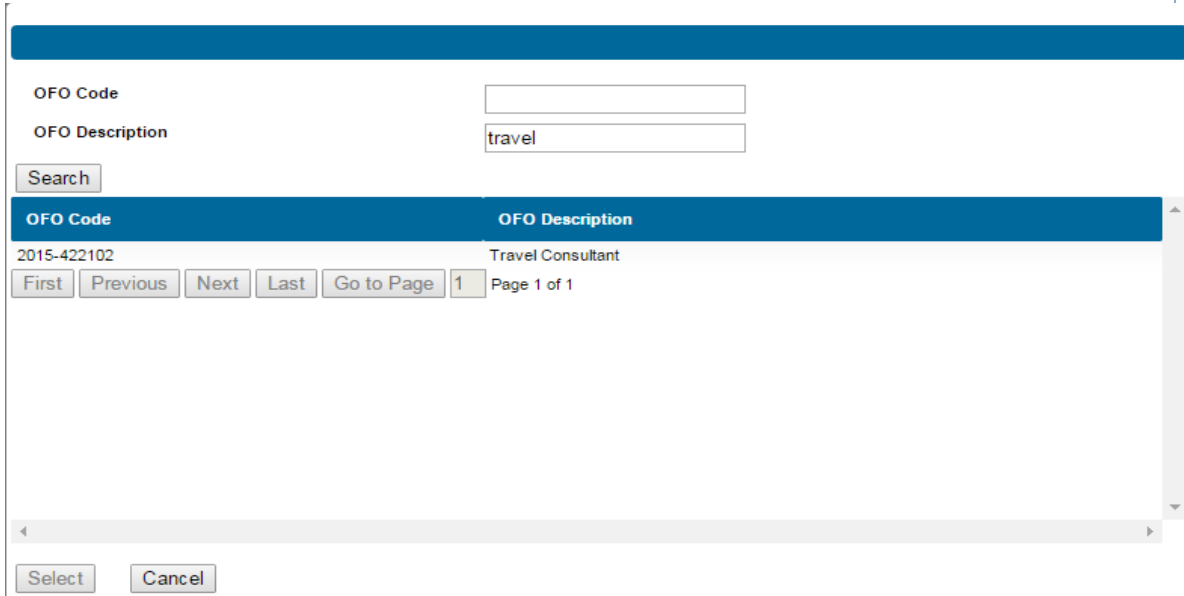
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St e p	Action / Screenshot
	If sure, select Yes. If not select No
10	After making your selection click on the Save Button
11	If No is selected the ATR section will be open to complete.
12	At any time the First time submission can be updated. See screen below
13	The following screen will display

4.2   Planning

4.2.1   Form A – Employment Summary

Step	Functionality
1	All fields indicated as a **Lookup** field, are fields with a lookup with specific values to use. The SDF cannot change these, or use values other than what is in the list of lookup values.
2	The **OFO Occupation Code** field has a built in search functionality. When you click in this field, a page will open that looks as follows (please see below): The SDF can search for the occupation by adding **search criteria** and clicking on the **Search** button. The SDF will click anywhere on the line as example below to select the line.

Step	Functionality

OFO Code

OFO Description travel

Search

OFO Code	OFO Description
2015-422102	Travel Consultant

First | Previous | Next | Last | Go to Page | 1 | Page 1 of 1

Select   Cancel

The selected line will turn Green and then click on the Select button at the bottom of the screen.

OFO Code

OFO Description travel

Search

OFO Code	OFO Description
2015-422102	Travel Consultant

First | Previous | Next | Last | Go to Page | 1 | Page 1 of 1

Select   Cancel

The selected OFO code and Occupation will display

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Step	Functionality
	OFO Occupation St 2015-422102 - Travel Consultar
3	Click on the magnifying class next to Geography **Geography** St
4	Please note: All fields indicated as a **Lookup** field, are fields with a lookup with specific values to use. The SDF cannot change these, or use values other than what is in the list of lookup values.
5	The following screen will display: **Municipality Name** **City Name** **Postal Code** Search Select Cancel
6	Type in the municipality Name OR City Name OR Postal Code and click on Search **Municipality Name** **City Name** **Postal Code** 0157 Search Select Cancel
7	The system will return all values as per criteria searched

Step	Functionality

| 8 | Select the applicable line by clicking anywhere in the row as screenshot below:

The row selected will turn Green |

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Municipality Name [   ]

City Name [   ]

Postal Code [0157]

[Search]

City Name	Municipality Name	Postal Code
Centurion	Tshwane Metro	0157
Highveld	Tshwane Metro	0157
Pretoria	Tshwane Metro	0157
Rooihuiskraal	Tshwane Metro	0157
Wierdapark	Tshwane Metro	0157

[First] [Previous] [Next] [Last] [Go to Page] [1] Page 1 of 1

◄

[Select] [Cancel]

Then click on the Select Button

Municipality Name [   ]

City Name [   ]

Postal Code [0157]

[Search]

City Name	Municipality Name	Postal Code
Centurion	Tshwane Metro	0157
Highveld	Tshwane Metro	0157
Pretoria	Tshwane Metro	0157
Rooihuiskraal	Tshwane Metro	0157
Wierdapark	Tshwane Metro	0157

[First] [Previous] [Next] [Last] [Go to Page] [1] Page 1 of 1

◄

[Select] [Cancel]

The Geography selection will be added to the section

Step	Functionality
	Geography Tshwane Metro
9	Male and Females must include disability. Disability must be specified separately: e.g. 3 Male, 2 Female, of which 2 are disabled.
10	Note that, for each row, "Total Male" + "Total Female" = "Age <35" + "Age 35-55" + "Age >55" = Sum of "Skill Level".
11	Bulk Import Note : This functionality is only available for companies more than 1000 employees.
12	If you want to upload data using the excel spreadsheet , click on Bulk import button:
13	Download the Excel template and complete all fields The file will be displayed at the bottom left of the screen

Step	Functionality

The Excel Template will display, Click on Enable Editing

Please ensure data is added to the template without any formulae or links.

If a dropdown is available – please select the data form the dropdown.
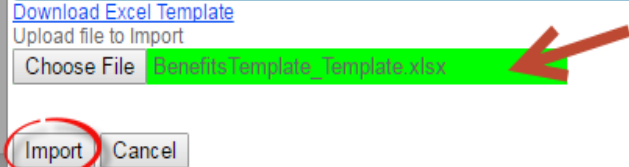
14	Once the template has been downloaded and completed the file can be

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uploaded using the 'Browse' functionality to locate the file.

Once the file has been uploaded (it will turn green) click 'Import'.

The uploaded results will be displayed next to the bulk import button, if there is an error on one line that data will not be imported. The exceptions can be viewed in the report.

Each line added is displayed and can be edited by clicking on the line and clicking the 'Edit' button.

A line can be removed by clicking on the specific line and clicking on the 'Remove' button.

All records in the forms can be removed by clicking on the 'Remove All' button.

Occupational level (1 digit OFO code)	Occupational level (6 digit OFO code)	African Male	Coloured Male	Indian Male	White Male	Foreign Male	African Female	Coloured Female	Indian Female	White Female	Foreign Female	African Disabled	Coloured Disabled	Indian Disabled	White Disabled	Foreign Disabled	Total Male	Total Female	Total Disabled	Age Group - Less than 35	Age Group - 35 to 55	Age Group - Greater than 55
1 - Managers	111101 - Local or Provincial Government Legislator	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	2	0	0	1	1	0

15	The added data will be displayed as the below screenshot:

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16	After completing this section, please tick the Confirm Check box, Click Save and then click on Back to MGA Forms

17	Important Notes:

Bulk Imprt is only avaialble for companies with employees more than 1000.

Please use **ONLY** the values in the drop downs where applicable – any other values will not be allowed during the import.

All valid values on the drop downs can be seen on worksheet 2. The dropdown list will contain the information relevant to that specific section on Indicium

Step	Functionality

18	Ensure that the race, age and gender breakdowns correspond

	A	B
2	Occupational Code	Specialization / Alternate Title
4	2015-111101 - Local or Provincial Government Legislator	2015-111101 - Community Board Member
5		
6		
7		
8		

19	

4.2.2 Form B – Educational Profile

Action / Screenshot

Follow steps 1 – 7 in section 7.1

The Educational Profile needs to be completed.

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The guideline of the NQF Band Descriptor can be downloaded by clinking on this hyperlink.

Back to MGA Forms	Educational Profile

Confirm	☐

Save

Edit

Description	Number Of Employees
AET	0
NQF Level 1,2	0
NQF Level 3,4,5,6	0
NQF Level 7,8,9,10	0
Grand Total	0

NQF BAND DESCRIPTOR

The following template will display.

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196.4.89.30/CathsSetaInd ×   196.4.89.30/CathsSetaInd ×

← → C   ⓘ 196.4.89.30/CathsSetaIndicium/Pages/WspAtr/Forms/2017/NQFBandDescriptor.aspx

Apps   Home - Home   G FASSET   G Google   S Skype   Home - First National   G Google   Google Maps   G Google   Cathsseta   Test Site Indiciu
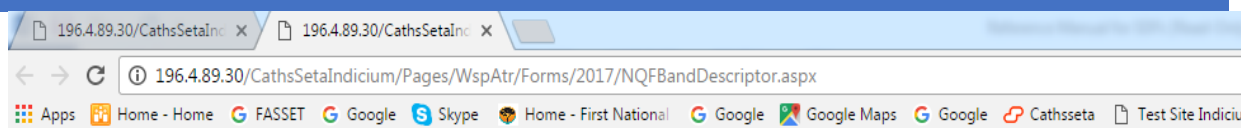
NQF BAND DESCRIPTOR

NQF LEVEL	BAND	QUALIFICATION TYPE		QUALITY COUNCIL	
10	Higher Education & Training	Post-doctoral research degrees	QCTO	Council on Higher Education	
9		Doctorates (10)			
8		Masters degree (8)			
7		Professional Qualifications (8)			
6		Honours degrees (8)			
5		National first degrees (7)			
		Higher diplomas (6)			
		National diplomas			
		National certificates (5)			
Further Education and Training Certificate (FETC)					
4	Further Education & Training	National certificates -	QCTO	Umalusi	
3		This is below university and			
2		tertiary level – includes workplace			
		learning -			
		occupationally driven work			
		Called vocational – not abstract			
		and theoretical study			
General Education and Training Certificate (GETC)					
1	General Education & Training	Grade 9 / ABET Level 4	QCTO	Umalusi	
		National certificates (5)			

After viewing the Template please click on the close button as displayed in the below screenshot.

To complete the data per level, please select the row, until highlighted in Green and then click on Edit.

After clicking on Edit, please complete the section and Click on the Update button.

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Once all the Descriptions have been captured, please tick the checkbox to Confirm and then click on save Button

4.2.3   Form C1 - Planned Beneficiaries of Training Summary

- This form is a Read only and is summarised from C2, C3 and C4

4.2.4   Form C2 - Planned Training Unemployed

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Follow steps 1 – 7 in section 7.1

The Planned Training Unemployed needs to be completed.

Once data has been captured it will display as follows:

To Edit, Remove or Remove All data click anywhere in the row to select the row.

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OFO Major Group	OFO Occupation	Municipality	Type Of Learning Programme	Entry Level	Intermediate Level	Advanced Level	African Male	African Female	African Disabled	Coloured Male	Coloured Female	
MANAGERS	2015-111301 - Traditional Leader	Johannesburg Metro	test	2	24	0	24	0	10	0	0	0
MANAGERS	2015-111101 - Local or Provincial Government Legislator	Johannesburg Metro	test	1	1	0	1	0	0	0	0	0
MANAGERS	2015-111101 - Local or Provincial Government Legislator	Albert Luthuli	Type 1	12	3	12	3	0	0	9	0	0
MANAGERS	2015-111102 - Member of Parliament / Parliamentarian	Amahlathi	Type 2	3	8	3	0	3	0	0	0	0
MANAGERS	2015-111102 - Member of Parliament / Parliamentarian	Mkhomazi Wilderness Area	Type 3	3	9	3	0	3	0	0	0	0

The selected row will turn green in color and then the Edit, remove and Remove all button can be used.

Edit   Remove   Remove All

OFO Major Group	OFO Occupation	Municipality	Type Of Learning Programme	Entry Level	Intermediate Level	Advanced Level	African Male	African Female	African Disabled	Coloured Male	Coloured Female	C D
MANAGERS	2015-111301 - Traditional Leader	Johannesburg Metro	test	2	24	0	24	0	10	0	0	0
MANAGERS	2015-111101 - Local or Provincial Government Legislator	Johannesburg Metro	test	1	1	0	1	0	0	0	0	0
MANAGERS	2015-111101 - Local or Provincial Government Legislator	Albert Luthuli	Type 1	12	3	12	3	0	0	9	0	0
MANAGERS	2015-111102 - Member of Parliament / Parliamentarian	Amahlathi	Type 2	3	8	3	0	3	0	0	0	0
MANAGERS	2015-111102 - Member of Parliament / Parliamentarian	Mkhomazi Wilderness	Type 3	3	9	3	0	3	0	0	0	0

4.2.5   Form C 3 - Planned Training – Employed

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Action / Screenshot
Follow steps 1 – 7 in section 7.1
The Planned Training Employed needs to be completed.

4.2.6   Form C4 – Planned AET Training

Action / Screenshot
Follow steps 1 – 7 in section 7.1
The Planned AET Training needs to be completed. Please answer the question below by selecting Yes or No form the dropdown. Then Click on the Save button

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Action / Screenshot
  Please click on relevant AET level to edit and complete the info

4.2.7   Form C5 – List of Vacancies that are difficult to fill

Action / Screenshot
Follow steps 1 – 7 in section 7.1
The List of Vacancies that are difficult to fill needs to be completed.

| Dashboard | Skills |

Back to MGA Forms   List of Vacancies that are difficult to fill   SUN INTERNATIONAL - A0000000

1 January 2017 - 31 December 20

OFO Occupation	St
Number Of Current Vacancies	
Degree Of Scarcity	▼
Period of vacancy: How long has the position been vacant?	▼
Reason for vacancy: What, in your opinion, is/are the reason/s this position has been vacant?	▼
Qualification/s required: What qualification/s is/are required for this position?	▼
Skills required: At what skills level is this position?	▼
Work experience required: How much work experience is required for this position?	▼
Projected Number of Staff	
Number of Qualified Persons Imported from Outside SA	
Province	▼

If there is nothing to report click on the tick box and click on Save.

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

This section is crucial in assisting to identify the scarce skills within the sector The main thrust of obtaining this data is for effective planning in terms of skills demand & supply. Indicate the race/gender and disability that the company is targeting for filling the vacancy.
The degree of scarcity is indicated as:
• 1: Moderate (often cyclical) scarcity
• 2: Serious scarcity problems
• 3: Extreme or severe scarcity
Note - When capturing people with disabilities, these individuals must be both captured as either Male or Female as well as disabled. Not doing so will result in the syste rejecting your submission.

| **Nothing to Report** | ✔ |

Save

The below section is compulsory to complete.
After data has been captured click on the Save button.

Please list the Top three most common SKILLS GAPS by major occupation level

Major Occupation	No	List the Top 3 Most common Skills Gap
Managers	1	1
	2	
	3	none
Professionals	1	none
	2	gap
	3	none
Technicians and Associate Professionals	1	budget
	2	none
	3	none
Clerical Support Worker	1	none
	2	supoort
	3	none
Service and Sales Workers	1	none
	2	none
	3	none
Skilled Agricultural,Forestry,Fishery,Craft and Related Trades Workers	1	none
	2	fire arm
	3	none
Plant and Machine Operators and Assemblers	1	none
	2	yes
	3	none
Elementary Occupations	1	none
	2	nine
	3	none

Save Cancel

5   Reporting

5.1 Form D1 – Number of Actual Beneficiaries of Training

The below form needs to be completed.

Please see the note at the bottom of the page.

(This forms is for previous financial year – 01 January 2016 to 31 December 2016.)

5.2 Form D2 – Number of Beneficiaries who completed the Training interventions

The below form needs to be completed:

5.3   Form D3 – Total number of Beneficiaries who completed AET training

The below question needs to be completed:

The below form needs to be completed:

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
Level 2		0	0	0	0	0	0	0	0	0	0	0	0
Level 3		0	0	0	0	0	0	0	0	0	0	0	0
Level 4		0	0	0	0	0	0	0	0	0	0	0	0

5.4   Form D4 – Impact Assessment

The below question needs to be completed by selecting Yes/No from the dropdown:

If Yes is selected Click on the Save button

If No is selected complete the below information:

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Then click on Save to Save the information

6   Planning Pivotal

6.1   Form E1 – Summary of Form E2 and E3

6.2   Form E2 – Pivotal Plan – Planned Training – Unemplyed

The below form needs to be completed:

Note – Please make use of the date picker when completing the start and end date.

6.3   Form E3 – Pivotal Plan – Planned training – Employed

The below form needs to be completed:

PIVOTAL Programmes mean professional, vocational, technical, and academic learning programmes that result in occupational qualifications and may include a knowledge component that is normally delivered at a further education and training college or a university as well as structured learning in an accredited training centre or an approved workplace. Examples of the types of learning are, Professional Learning would be a BCOM for Accountants, Vocational learning would be the National Certificate Vocational obtained from an FET college, Technical learning would be N4 Electrical Engineering and Academic Learning would be the MBChB required for Medical Doctors that can only be studied at University

PIVOTAL Plan – Planned Training – Employed

| OFO Occupation | St |
| Geography | St |

If you would like to use the physical address on the Organisation Details page, please tick this box. ☐

Pivotal Programme	
NQF Level	▼
Delivery Approach	▼
Start Date	
End Date	

African			Coloured			Indian/Asian			White			Age Group		
M	F	D	M	F	D	M	F	D	M	F	D	< 35	35 - 55	> 55
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Add   Bulk Import

Note – Please make use of the date picker when completing the start and end date.

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7   Reporting Pivotal

7.1   Form F1 – Pivotal Report Trained Beneficiaries – Summary

This form is a summary of Form F2 and F3

7.2   Form F2 – Pivotal Report – Number Trained – Unemployed

The below form needs to be completed:

PIVOTAL Programmes mean professional, vocational, technical, and academic learning programmes that result in occupational qualifications and may include a knowledge component that is normally delivered at a further education and training college or a university as well as structured learning in an accredited training centre or an approved workplace. Examples of the types of learning are, Professional Learning would be a BCOM for Accountants, Vocational learning would be the National Certificate Vocational obtained from an FET college, Technical learning would be N4 Electrical Engineering and Academic Learning would be the MBChB required for Medical Doctors that can only be studied at University

PIVOTAL Report – Number Trained – Unemployed

| OFO Occupation | St |
| Geography | St |

If you would like to use the physical address on the Organisation Details page, please tick this box. ☐

Pivotal Programme	
NQF Level	▼
Delivery Approach	▼
Start Date	
End Date	

African			Coloured			Indian/Asian			White			Age Group		
M	F	D	M	F	D	M	F	D	M	F	D	< 35	35 - 55	> 55
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

[Add] [Bulk Import]

7.3   Form F3 – Pivotal Report – Number Trained – Employed

The following form needs to be completed:

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7.4   Form F4 – Pivotal Report – Impact Assessment

The following question needs to be completed by selecting Yes or No from the dropdown and then click on Save.

If No is selected the following fields need to be completed:

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Impact Assessment

Does what you have reported is in line with what you've planned the year before?	No ▼	
Budget Constraints		*Required
Cashflow		*Required
Operation Requirements		*Required
Provider Availability Or Inadequacy		*Required
Restructuring		*Required

Occupational Description

MANAGERS

Type Of Learning Programme		*Required
Training Level	▼ *Required	
Number		*Required

PROFESSIONALS

Type Of Learning Programme		*Required
Training Level	▼ *Required	
Number		*Required

TECHNICIANS AND ASSOCIATE PROFESSIONALS

8 General Comments

8.1 Form G – General Comments

The following form needs to be completed and then click on Save:

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General Comments	
Comment:	
Characters Left	10000

Save   Cancel

9 Submit Button

The Submit button is highlighted in red and displays as follows:

Indicium
SETA Management System

Welcome, Adele - Primary SDF
Log out

Switch Profile

cathsseta

Dashboard   Skills

Main Page	**Mandatory Grant Application Forms** **01 January 2017 - 31 December 2017**	**SUN INTERNATIONAL - A000000003**

Update First Time Submission Status

Submit MGA Forms

#	Form	Description	Due Date	Select
	Planning			Select
1.	A	Employment Summary	30/04/2017	Select
2.	B	Educational Profile	30/04/2017	Select
3.	C1	Planned Beneficiaries of Training Summary	30/04/2017	Select
4.	C2	Planned Training- Unemployed	30/04/2017	Select
5.	C3	Planned Training- Employed	30/04/2017	Select
6.	C4	Planned AET Training	30/04/2017	Select
7.	C5	List of Vacancies that are difficult to fill	30/04/2017	Select
	Reporting			Select
8.	D1	Number of Actual Beneficiaries of Training	30/04/2017	Select
9.	D2	Number of Beneficiaries who completed the Training interventions	30/04/2017	Select
10.	D3	Total number of beneficiaries who completed AET programmes	30/04/2017	Select
11	D4	Impact Assessment	30/04/2017	Select

Note: If the Submit button is not clicked the application will not be submitted.

Note: If an error as displayed in red appears next to the submit button as per example below:

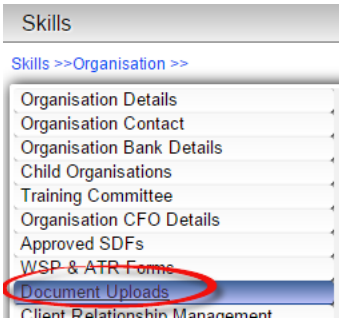Go to the Form specified in the message and complete the form.
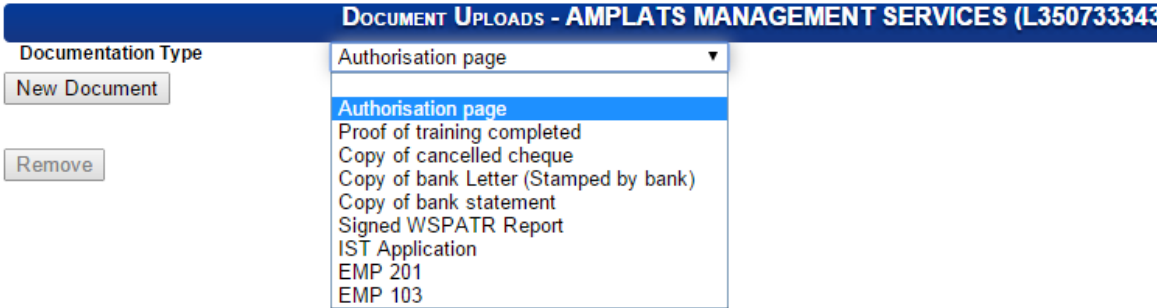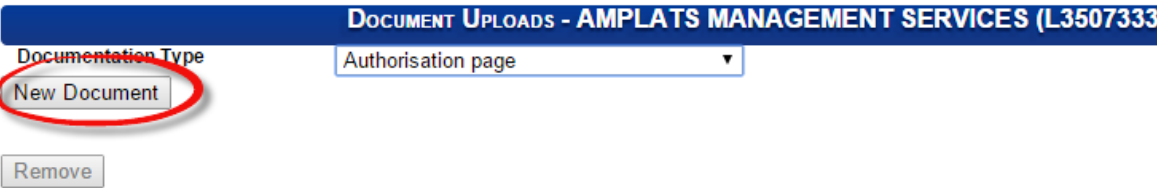
Remember to click on the Save button on each form.

10 Uploading of Documents

The summary report with the signatures authorising the submission must be uploaded by following the next steps:

Ste p	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	To upload documents click on the **Document Uploads** section.

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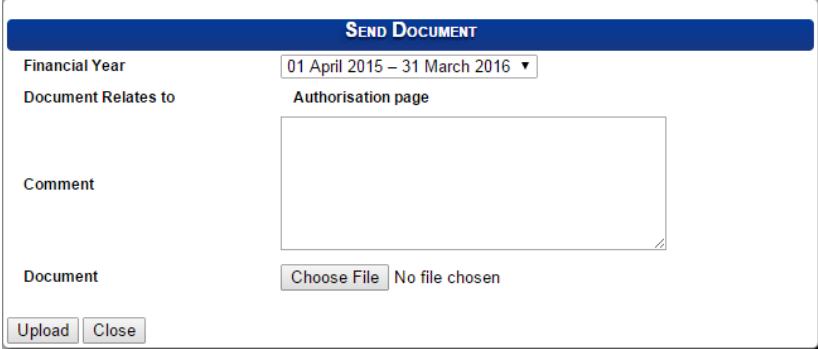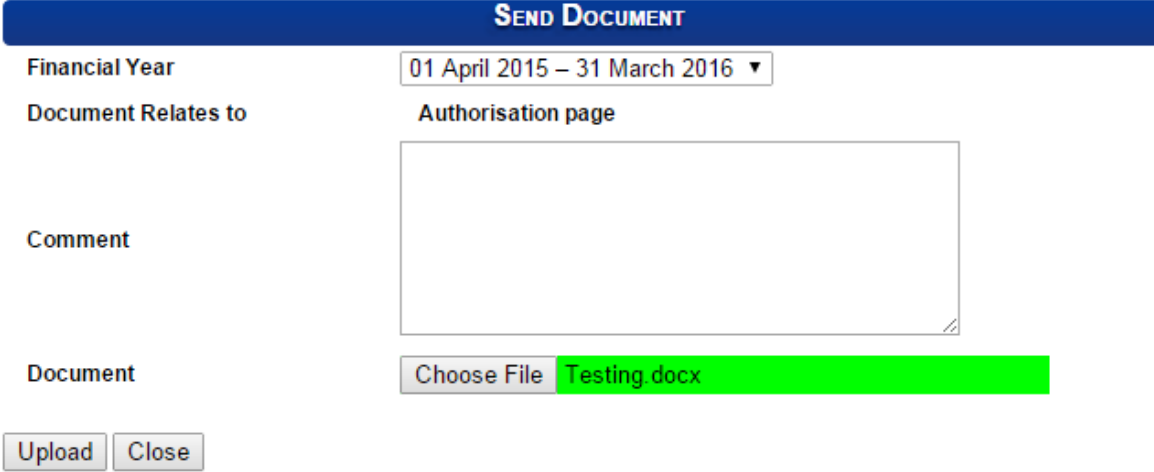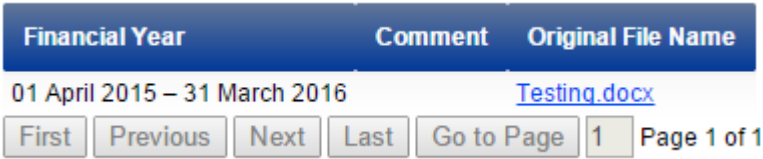| Step	Action / Screenshot
3	The SDF must select the type of document to upload from the **Documentation Type** lookup field. **NOTE:** It is important that the SDF selects the correct document type in order for Indicium to recognize the document and apply the correct rules.
4	Once the documentation type is selected, the document must be chosen from the location where it is saved by clicking on the **New Document** button.
5	This will open a window where the SDF needs to select the financial year. Click on the **Choose File** button to select the document from its location.

Step	Action / Screenshot
6	Indicium will show a green bar if the document has been successfully uploaded. Click on the **Upload** button to save the document.
7	Indicium will display the upload:

11 The "Grants and Levies" Tab

We strongly recommend that a person in the Finance Department/Division registers on the On-Line Grant System to track the Skills Development Levies that your organisation contributes to SARS, and to reconcile these levies against the Mandatory Grant that the Seta pays back to your organisation.

We frequently receive queries from SDFs because the Grant payment does not match 20% of the organisation's levies, and as will be noted below, the Seta cannot assist with these queries. This section provides a brief overview on how to access this data in our system, followed by an example of how to go about reconciling the Mandatory Grant based on the organisation's Levy Contributions.

To view the financial statement summary, the SDF will select financial summary and then select the respective financial year which was chosen.

To view the Grant and Levies, select the specific summary report.