DISCRETIONARY GRANT ONLINE SYSTEM

User Manual

Deloitte.

Client:	CATHSSETA training manual
Project Name:	Discretionary Grant Training Manual
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Date:	31 October 2016

TABLE OF CONTENTS

1   INTRODUCTION

This is a Training Manual for the Online Discretionary Grant application.

The preferred Browser to do the Online Application is Google Chrome and not Internet Explorer or Firefox.

2   Register as new Discretionary Grant (DG) Applicant

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

Step	Action / Screenshot
1	The DG Stakeholder navigates to the CATHSSETA Indicium Seta Management System page.
2	The DG Stakeholder selects the **Register as a new discretionary grant applicant** option at the bottom of this page.
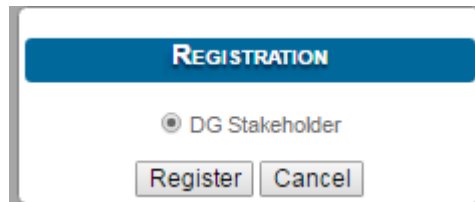
3	Indicium opens the pop-up Registration window.
	
	The Applicant has **two** options:
	    i. *Cancel* – click on the **Cancel** button to cancel the registration process and return to the logon screen.
	    ii. *Register* – click on the **Register** button to continue with the registration process.

4	Indicium opens the **Applicant Details** form for the DG Stakeholder to complete.

2.1 DG Stakeholder First Logon

The DG Stakeholder will then be required to use the username and password sent to them via email to logon to the system and continue

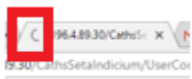| Step	Action / Screenshot
1	The DG Stakeholder navigates to the Cathsseta Indicium Seta Management System page.

Please note the following rules on this screen:

#	Field	Rule
1	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.
2	Alternate ID Type	The DG Stakeholder 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 Number.
3	Title	Indicium will populate this field where the ID No is a valid SA No. However, the DG Stakeholder can update as well.

			Indicium will not populate this field where the ID No is another type of number and the DG Stakeholder will need to update this field.
	4	Initials	This is a populated field where Indicium will populate the field with the first letter of the First Name
	5	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 DG Stakeholder will need to update this field.
	6	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 DG Stakeholder will need to update this field.
	7	Telephone Number	This number must be 10 characters, NO spaces
	8	Cell Phone Number	This number must be 10 characters, NO spaces
	9	Fax Number	This number must be 10 characters, NO spaces
	10	Physical / Postal code	Indicium will populate the following field when a valid Code is entered: • Municipality • Urban Rural • Province
	11	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 DG Stakeholder does not need to capture the information gain. Use Physical Address For Postal Address? ☐ the above check box can be ticked if the physical address is the same as the postal address
	12	Page load	Before populating the next fields, ensure that the page is done loading, this will be seen on the tab; else when it refreshes the info that was not saved will be wiped. The page loads after the below info is populated 1. First name is entered so that it can populate the initials 2. ID number is captured for validation. 3. Postal code, to populate municipality

5	The DG Stakeholder clicks on the **save and proceed** button to submit the information captured. Save and Proceed
6	If any compulsory fields have been left it, the system won't permit the user to continue.
7	Before proceeding, ensure that the page is done loading
8	Indicium proceeds to the next page **Organisation Details** window.

INDICIUM

Organisation Details

STEP 1: FIRSTLY, you need to add the relevant SDL Number if applicable
(Click on magnifiying glass next to Organisation)
STEP 2: Only AFTER you have added the relevant SDL Number, you will be able to upload the signed declaration of authori
(Click on the button next to Declaration of authorized person: Select Upload) Please note that the file can only be a pdf file

Organisation	S 0
Financial Year	[dropdown]
Declaration of authorized person: Select upload	Choose File No file chosen

Save

Finalise Application

Click on the above magnifying glass next to Organization to search for the organization you are submitting for

ORGANISATION

Legal Name	[field]
Trade Name	[field]
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

Once the organization has been returned by the system, click on the organization name, then click select. You will then be taken to the below screen to upload your declaration of authorized person letter.

Step	Action / Screenshot

LOG IN

Login Information

NOTICE > All Usernames & Passwords are CASE SENSITIVE!
Username:
123456

Password:
••••••••

Login

Forgot Password

Register as a new SDF
Register as new discretionary grants applicant

Organisation Details

STEP 1: FIRSTLY, you need to add the relevant SDL Number if applic
(Click on magnifiying glass next to Organisation)
STEP 2: Only AFTER you have added the relevant SDL Number, you w
(Click on the button next to Declaration of authorized person: Select Uplo

Organisation	**St** Sun international - A000000003
Financial Year	01 April 2017 – 31 March 2018 ▾
Declaration of authorized person: Select upload	Choose File	Cert_003_8707110000000_14123.pdf

Save

Finalise Application

Once the letter has been uploaded is highlighted with green, click the save button, then finalize application.

User will then get a notification email of the registration along with credentials.

Reply   Reply All   Forward

skills@Cathsseta.org.za   pmthusi@dtss.co.za; dirk@crimzone.com; Phemelo Mothusi; Alize Groenewald ▾

DG Stakeholder Registration

Dear Mr Cathapp Cathsseta

You have been successfully registered as Stakeholder and successfully linked with the following organis

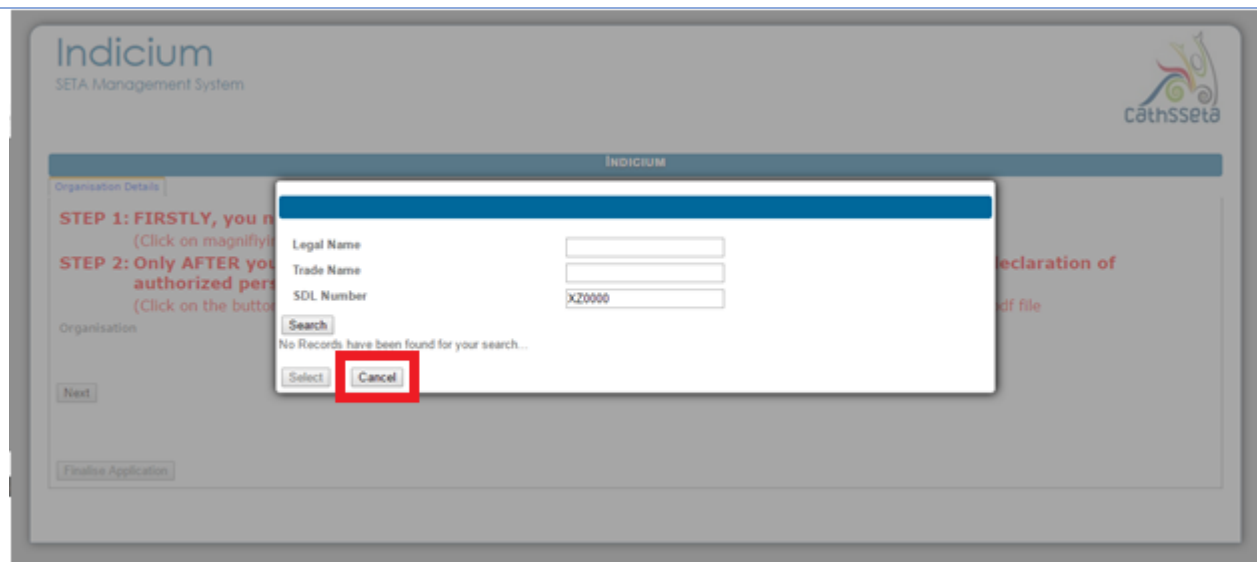| Company Name	SDL Number
test test	X000000001

Login Details:
Username: 123456
Password: Cathsseta

Yours in skills development
CATHSSETA Discretionary grants team
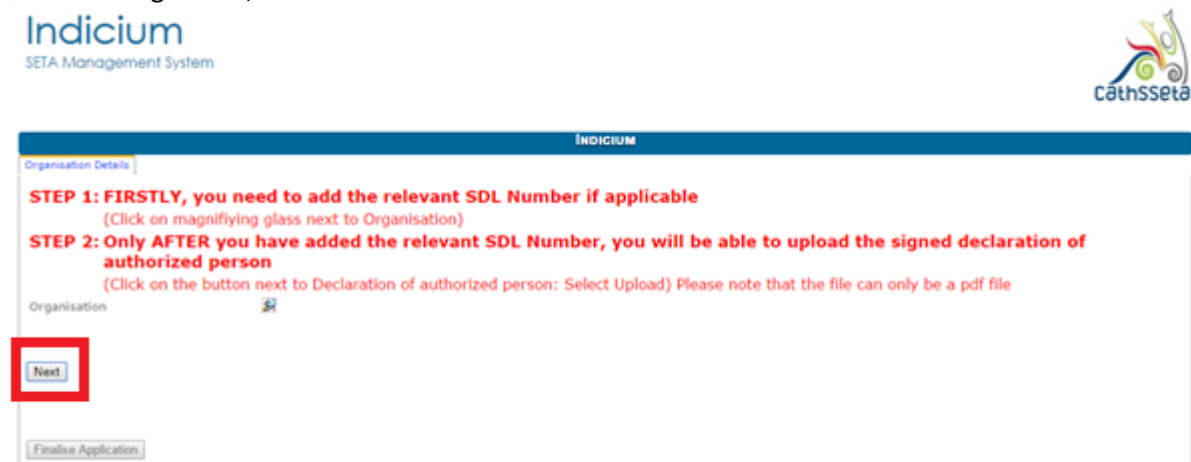
9	If user does not find organization after searching for it, click cancel

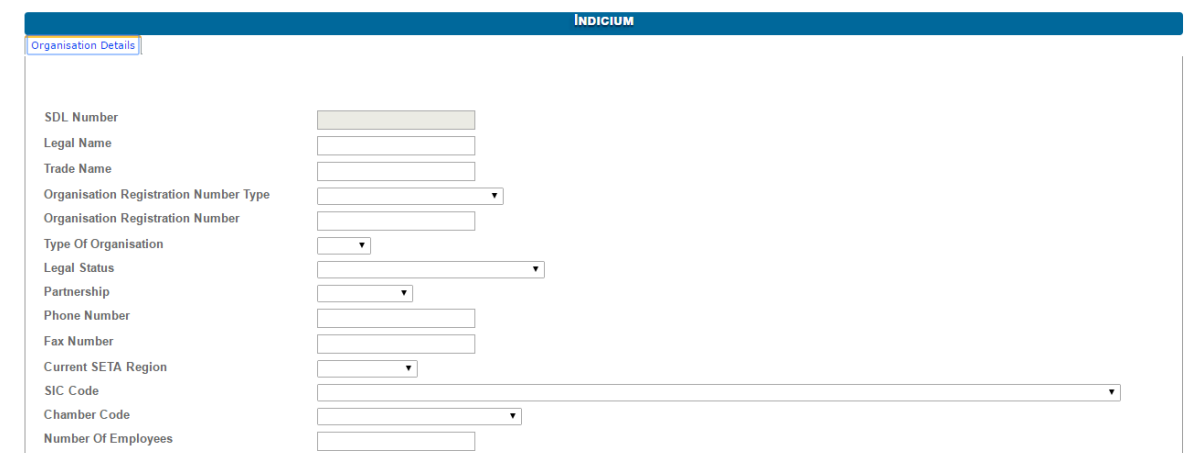| Document:	Discretionary Grant Training Manual	
Client:	CATHSSETA training manual	
Date:	31 October 2016	Page	8

After clicking cancel, click on the Next button

User will then be taken to a page where they should capture the organization details
Fields that are greyed out are not required for user to populate

Once fields have been populate, save, then upload declaration of authorized person letter, save, then finalize application	

Step	Action / Screenshot
2	The Indicium usernames and passwords are case sensitive!

User will receive notification email with credentials

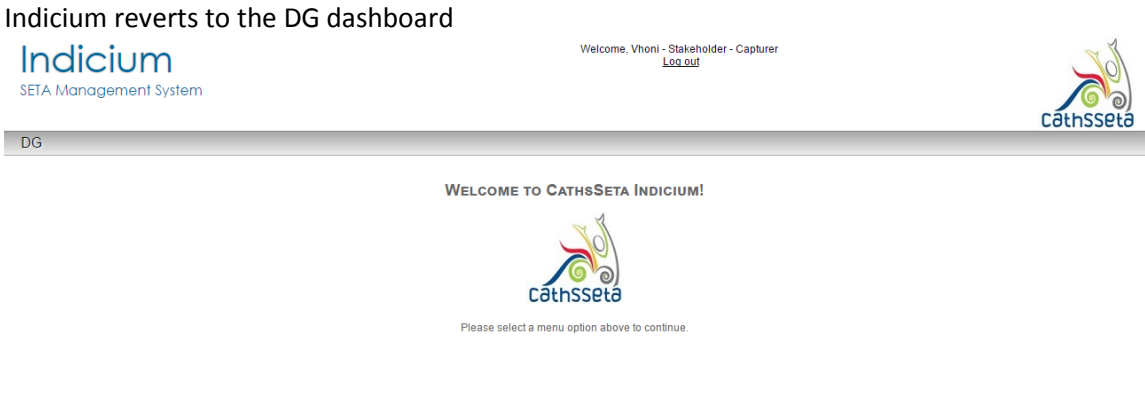| Step	Action / Screenshot
	  The DG Stakeholder needs to click on the **Login** button once the **Username** and **Password** is entered.
3	The DG Stakeholder enters the username and password then he or she will be moved to the home page **Note** the username will remain the same but the DG Stakeholder will need to change his/her password after a period of time.

3 Completing Application

3.1 Create Discretionary Grant Forms

Financial year; Type

Success End Condition

- Forms created for the type selected

Note: The below steps can be followed in order to capture the forms

Step	Action / Screenshot
1	Indicium reverts to the DG dashboard

Document:	Discretionary Grant Training Manual		
Client:	CATHSSETA training manual		
Date:	31 October 2016		Page | 10

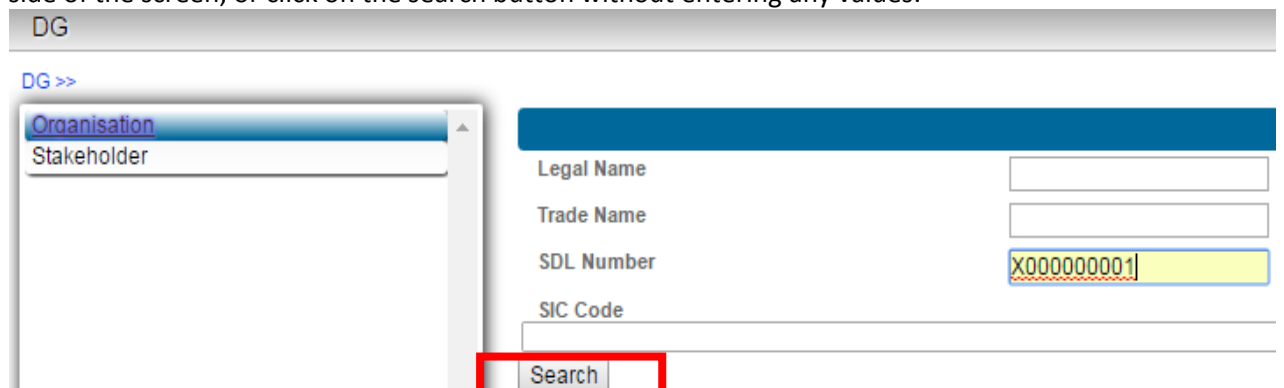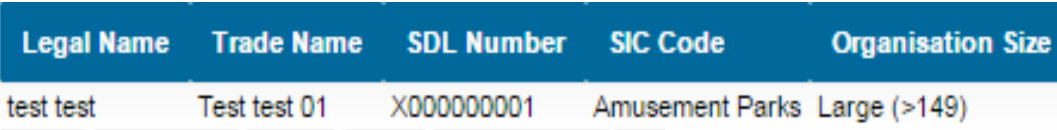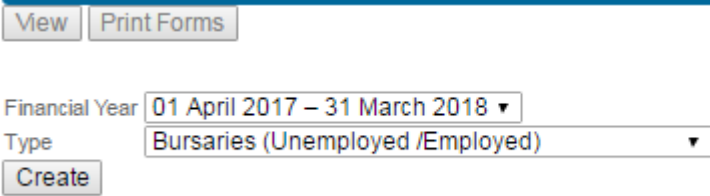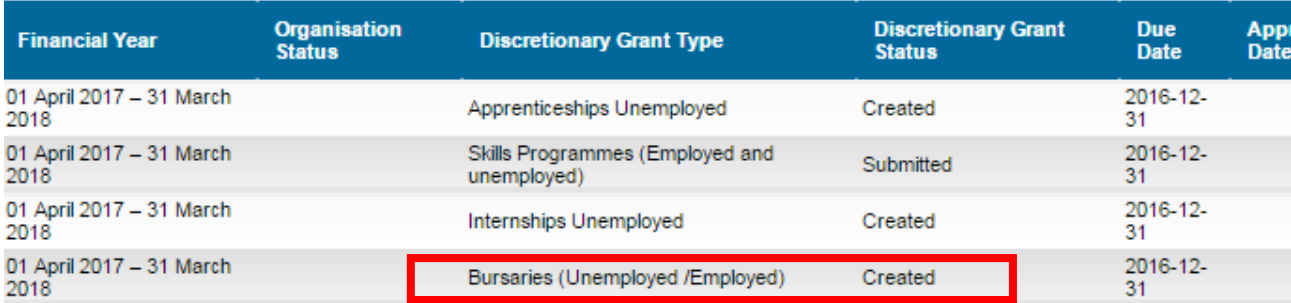| Step	Action / Screenshot
2	The DG Stakeholder clicks on the **DG** menu option.
3	Indicium opens the page with two options: • Organisation • Stakeholder **Note**: To change the view of this screen in order to display these options at the top, simply click on the black button showcasing a white arrow.
4	• The DG Stakeholder must click on the **Organization** menu option.
5	Search for the Organisation details by completing one of the filters on the page which opens on the right side of the screen, or click on the search button without entering any values.

Step	Action / Screenshot
6	Indicium will return the Organisation details.

Legal Name	Trade Name	SDL Number	SIC Code	Organisation Size
test test	Test test 01	X000000001	Amusement Parks	Large (>149)

Step	Action / Screenshot
7	To access the organisation, select the row and then click on the **Action** icon.

Legal Name	Trade Name	SDL Number	SIC Code	Organisation Size	Parent SDL Number	Action
test test	Test test 01	X000000001	Amusement Parks	Large (>149)		🔍

Step	Action / Screenshot
8	Indicium opens a page with the Discretionary grant form

DISCRETIONARY GRANT FORMS - TEST TEST (X000000001)

View | Print Forms

Financial Year | 01 April 2017 – 31 March 2018 ▼
Type | ▼
Create

Step	Action / Screenshot
9	The stakeholder must select the **financial year and the type** option from the dropdown menu then click create.

View | Print Forms

Financial Year | 01 April 2017 – 31 March 2018 ▼
Type | Bursaries (Unemployed /Employed) ▼
Create

Step	Action / Screenshot
10	Indicium will create the requested form as shown on the below screen shot. The Stakeholder must then click or select the Discretionary grant type.

Financial Year	Organisation Status	Discretionary Grant Type	Discretionary Grant Status	Due Date	Appro Date
01 April 2017 – 31 March 2018		Apprenticeships Unemployed	Created	2016-12-31	
01 April 2017 – 31 March 2018		Skills Programmes (Employed and unemployed)	Submitted	2016-12-31	
01 April 2017 – 31 March 2018		Internships Unemployed	Created	2016-12-31	
01 April 2017 – 31 March 2018		Bursaries (Unemployed /Employed)	Created	2016-12-31	

Step	Action / Screenshot
11	After the stakeholder has selected the form the he/she must then click the view button

12	Indicium will proceed to the next page of Discretionary grant forms

Please note the following rules for the DG form:

Rule
The user should be able to log in and out to complete the application
Not all the details will therefore be required for the user to save the information, all compulsory fields
Once the application is submitted no further changes will be allowed, only view access.

13	The stakeholder will then click on select to open the **Section A: Applicant Details form.** The stakeholder will then fill the information on the text boxes then click **save.** The stakeholder must then click **Back to discretionary grant form menu**

Back to Discretionary Grant Forms Menu
Section A: Applicant Details

Name of Organisation	Test
1st Time Implementer	No
Lead / Host Employer	-1
Applicant Physical Address 1	125 MNNN
Applicant Physical Address 2	Newlands
Applicant Physical Address 3	waterkoolf
Postal address same as physical	☑
Applicant Postal Address 1	125 MNNN
Applicant Postal Address 2	Newlands
Applicant Postal Address 3	waterkloof
Province of Applicant's Head Office	Gauteng
Period Of Company Existence	2-5 years
Organisation Category	Levy Payer
Skills Development Levy Number	X000000001
Organisation Contact Person Name	Cath
Organisation Contact Person Last Name	Cathsseta
Organisation Contact Person Designation	CFO
Organisation Contact Person Cell Number	0794561230
Organisation Contact Person Fax Number	
Organisation Contact Person Email Address	pmthusi@dtss.co.za
Size Of Business	Small (10-49)
Type Of Business	-1
Specify exact number of permanent employees	15
Main Activities Of Business	Hotels
SIC Code	Hotels, motels, boatels and inns not
Chamber Focus	Arts, Culture & Heritage,Hospitality,Travel & Tourism

Save   Cancel

| 14 | The stakeholder will then click on select to open the **Section B: Project History form.** The stakeholder will then fill the information on the text boxes then click **save**.
The stakeholder must then click **Back to discretionary grant form menu**. |

Back to Discretionary Grant Forms Menu

Do you have a current active or existing contract with CATHSSETA?	▼
Reference Number	
Start Date of Project	
End Date of Project	
Have you supplied/submitted all evidence as required for tranche payments?	▼
Have you complied to all requirements as per the CATHSSETA contracts and policy?	▼

Save   Cancel

Step	Action / Screenshot
15	The stakeholder will then click on select to open the **Section C: Project/Grant details form.** The stakeholder will then fill the information on the text boxes then click **save**. The stakeholder must then click **Back to discretionary grant form menu** Back to Discretionary Grant Forms Menu · Section C: Project/Details Qualification Title NQF Level ▼ Number of Credits Name of Employer Unemployed - Target Provinces (give learner breakdown in numbers) 	Western Cape	Northern Cape	Eastern Cape	Free State	Gauteng	Mpumalanga	Limpopo	North West	Kwa Zulu-Natal	 	0	0	0	0	0	0	0	0	0	 Total number of Unemployed beneficiaries Employed - Target Provinces (give learner breakdown in numbers) 	Western Cape	Northern Cape	Eastern Cape	Free State	Gauteng	Mpumalanga	Limpopo	North West	Kwa Zulu-Natal	 	0	0	0	0	0	0	0	0	0	 Total number of Employed beneficiaries Project Duration Proposed Start Date Proposed End date Total Amount Applied for Total Applicant's Contribution Save Cancel Rule: Target Provinces (give learner breakdown in numbers)
16	The stakeholder will then click on select to open the **Section E: Project/Grant Plan form.** The stakeholder will then fill the information on the text boxes then click **save**. The stakeholder must then click **Back to discretionary grant form menu**.

Step	Action / Screenshot

Step	Action / Screenshot
17	The stakeholder will then click on select to open the **Section F: Implementation Plan form.** The stakeholder will then fill the information on the text boxes then click **save**. The stakeholder must then click **Back to discretionary grant form menu**.

Step	Action / Screenshot
18	The stakeholder will then click on select to open the **Section H: Pivotal Plan form.** The stakeholder will then fill the information on the text boxes then click **save**.

Document:	Discretionary Grant Training Manual	
Client:	CATHSSETA training manual	
Date:	31 October 2016	Page | 16

Step	Action / Screenshot
	The stakeholder must then click **Back to discretionary grant form menu**. **Rule:** Must add up to Total Planned Beneficiaries
19	The stakeholder will then click on select to open the **Section I: Checklist form.** The stakeholder will then fill the information on the text boxes then click **save**. The stakeholder must then click **Back to discretionary grant form menu**.

Step	Action / Screenshot

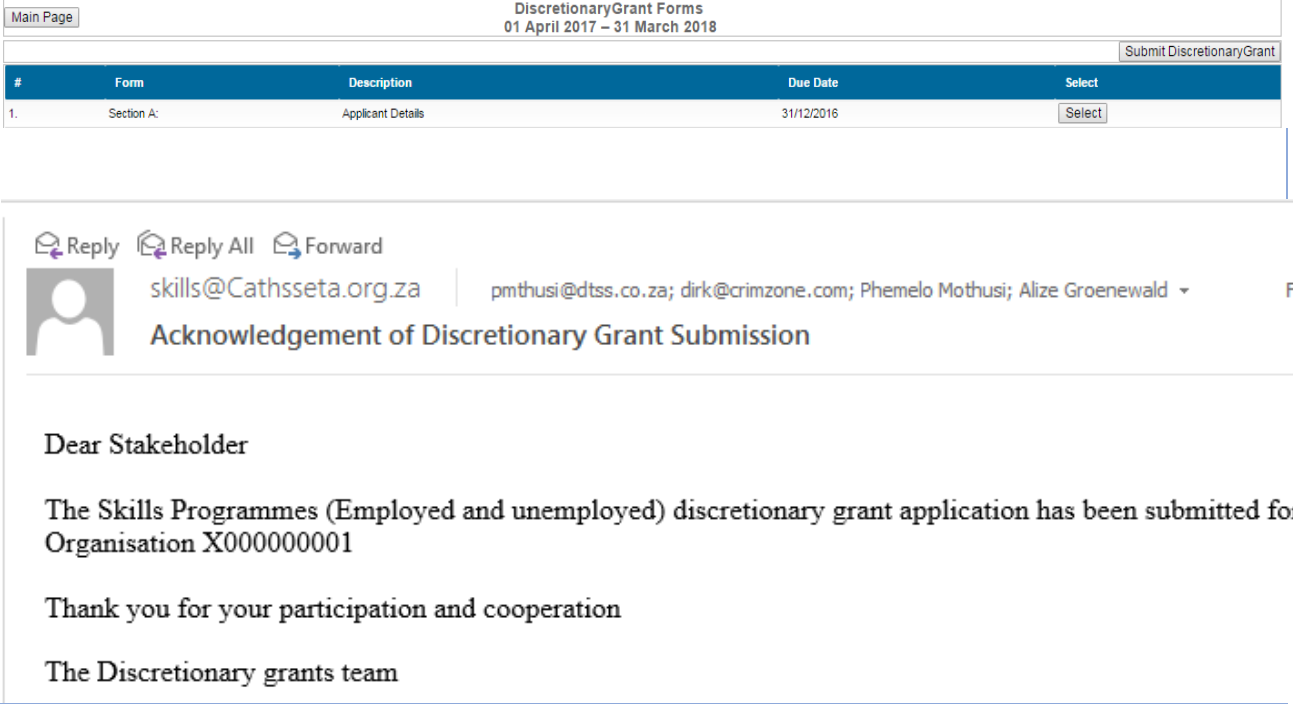|	
20	The stakeholder will then click on select to open the **Section DGI: Asset register form.** The stakeholder will then fill the information on the text boxes then click **save.** The stakeholder must then click **Back to discretionary grant form menu**. Back to Discretionary Grant Forms Menu DG Asset Register Does your entity have an asset ▼ Save Rule: If yes is selected, the below form must not display. If No is selected, button must display to click on and then the below form must display.
21	Once all the forms are completed the stakeholder will click the submit discretionary grant button. Then an email will be sent through form confirmation. Main Page DiscretionaryGrant Forms 01 April 2017 – 31 March 2018 Submit DiscretionaryGrant 	#	Form	Description	Due Date	Select	 	1.	Section A:	Applicant Details	31/12/2016	Select	 Reply Reply All Forward skills@Cathsseta.org.za pmthusi@dtss.co.za; dirk@crimzone.com; Phemelo Mothusi; Alize Groenewald ▾ F Acknowledgement of Discretionary Grant Submission Dear Stakeholder The Skills Programmes (Employed and unemployed) discretionary grant application has been submitted for Organisation X000000001 Thank you for your participation and cooperation The Discretionary grants team

4   NOTES