



Mandatory Grant Application Manual 2019

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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 2019).

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.

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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

Indicium
SETA Management System



COUNTDOWN TO MANDATORY GRANTS SUBMISSION DEADLINE

02 18 13 54 38
MONTHS DAYS HOURS MINUTES SECONDS

Log In

Login Information

NOTICE - All Usernames & Passwords are CASE SENSITIVE!

Username:

Password:

Login

[Forgot Password](#)

2.2 Technical Information

2.2.1 Browsers

CATHSSETA Indicium is compatible with the following browsers:

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1. Internet Explorer



2. Google Chrome

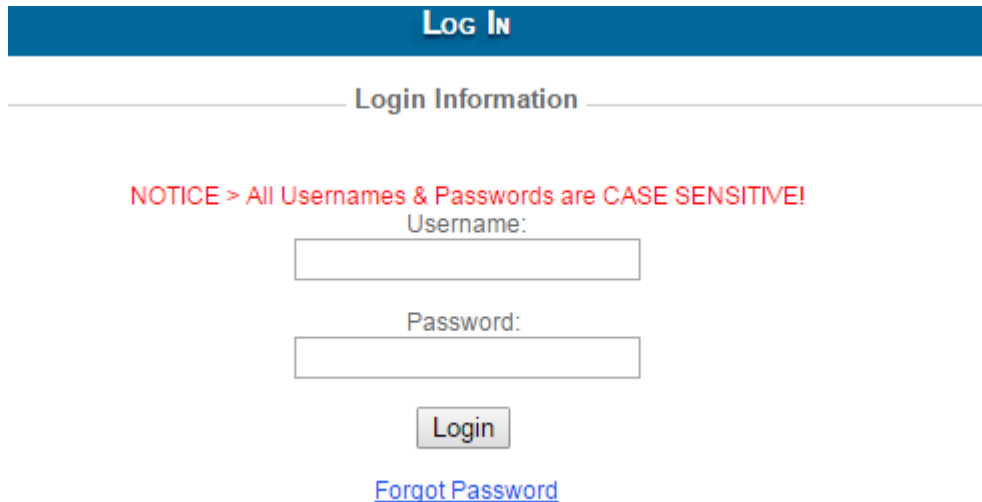


3. Mozilla FireFox



2.2.2 Forgotten Password

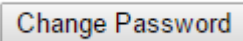
Once the SDF is registered on the system, it is possible to forget one's password therefore Indicum has an online 'Forgot Password' functionality. Please follow the following steps if you have forgotten your password.

Step	Action / Screenshot
1	<p>The SDF navigates to the CATHSSETA Indicum Seta Management System page.</p>  <p>The screenshot shows a login page with a blue header bar containing the text 'Log In'. Below the header is a section titled 'Login Information' with a red notice: 'NOTICE > All Usernames & Passwords are CASE SENSITIVE!'. There are two input fields labeled 'Username:' and 'Password:', followed by a 'Login' button and a blue link labeled 'Forgot Password'.</p>
2	<p>The SDF clicks on the Forgot Password link. The SDF capture the ID number</p>

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Step	Action / Screenshot												
	<div> <div>REQUEST PASSWORD</div> <div>Provide your ID number for new password</div> <hr/> <div>ID Number</div> <div><input type="text"/></div> <div>Request Password</div> <div>Back to Login</div> </div> <p>2.2.2.1.1</p> <p>Please do not copy and paste the ID number. The ID number must be typed in.</p>												
3	Indicium will send an email with the username and temporary password . Use these details as on the logon page.												
3	<p>Indicium will revert the Change Password page for the SDF to update the password to a new password.</p> <div> <div>CHANGE PASSWORD</div> <div>Your Password has expired please enter new password</div> <hr/> <div>New Password:</div> <div><input type="text"/></div> <div>Confirm Password:</div> <div><input type="text"/></div> <div>Change Password</div> <div>Back to Login</div> </div> <p>Please note the following rules on Creating of Passwords:</p> <table border="1"> <thead> <tr> <th>#</th><th>Rule</th></tr> </thead> <tbody> <tr> <td>1</td><td>The length of the password must be at least 8 characters long</td></tr> <tr> <td>2</td><td>Your password must contain one capital/upper case letter</td></tr> <tr> <td>3</td><td>Your password must at least contain one digit number</td></tr> <tr> <td>4</td><td>Your password must at least contain a symbol "{*&%\$#@</td></tr> <tr> <td>5</td><td>The password expires after 30 days, and the SDF will be required to enter a new password – each 30 days.</td></tr> </tbody> </table> <p>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.</p>	#	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.
#	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 "{*&%\$#@												
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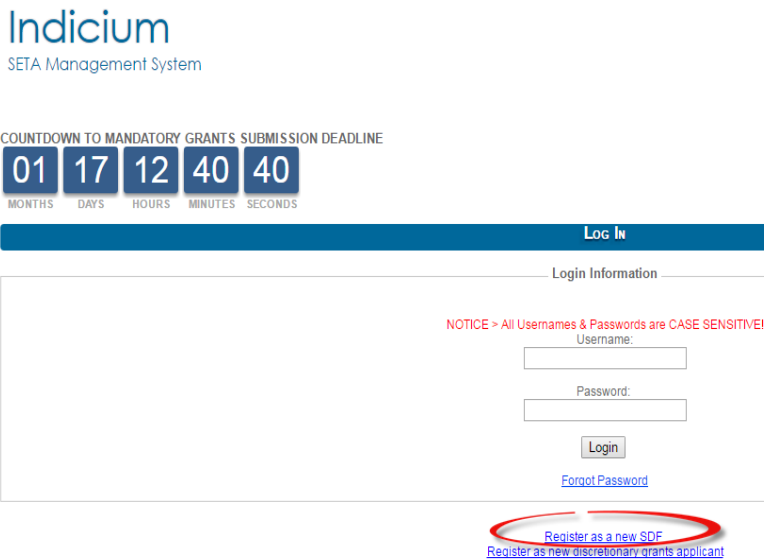
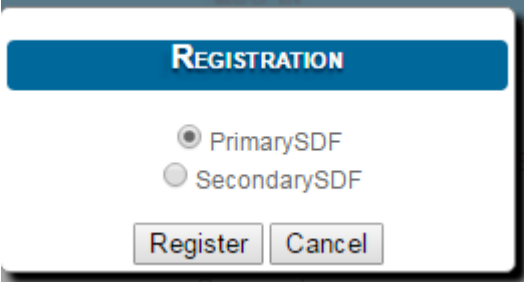
Step	Action / Screenshot
	
4	Indicium will send the SDF an e-mail notification upon successful changing of passwords. Please ensure that you provide the correct e-mail address.
5	If you have not received your temporary password, please contact CATHSSETA MG department to confirm if the e-mail address is still valid and current.

3 SDF Registration

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

Step	Action / Screenshot
1	<p>The SDF navigates to the CATHSSETA Indicium Seta Management System page.</p> 
2	The SDF selects the Register as new SDF option at the bottom of this page.

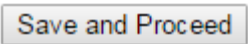
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Step	Action / Screenshot
	
3	<p>Indicum opens the pop-up Registration window.</p>  <p>The SDF has two options:</p> <ol style="list-style-type: none"> Cancel – click on the Cancel button to cancel the registration process and return to the logon screen. 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	Indicum opens the Applicant Details form for the SDF to complete.

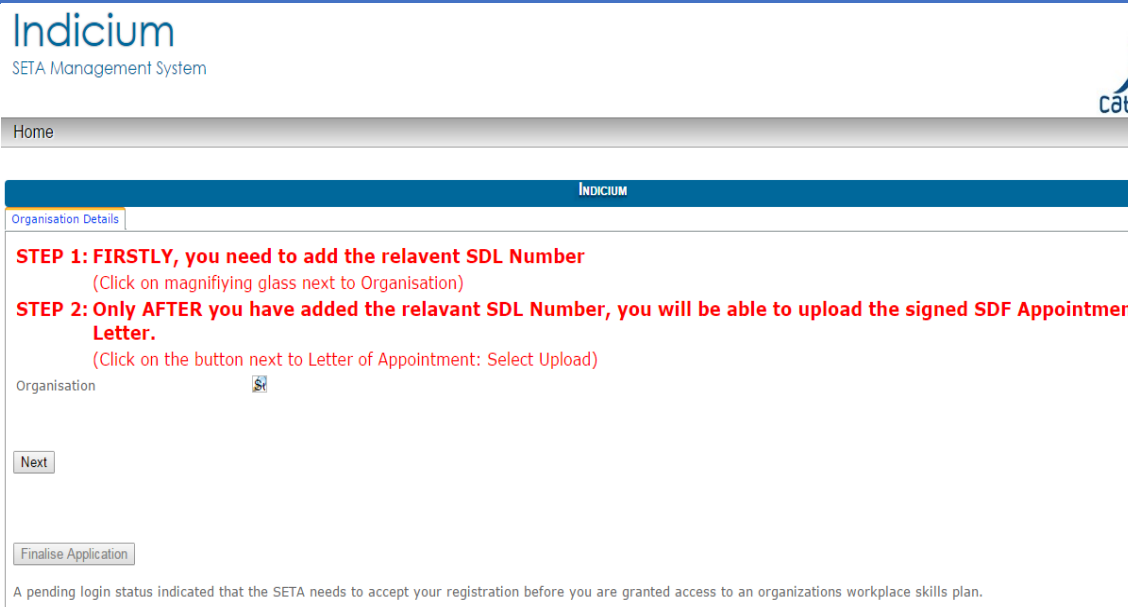
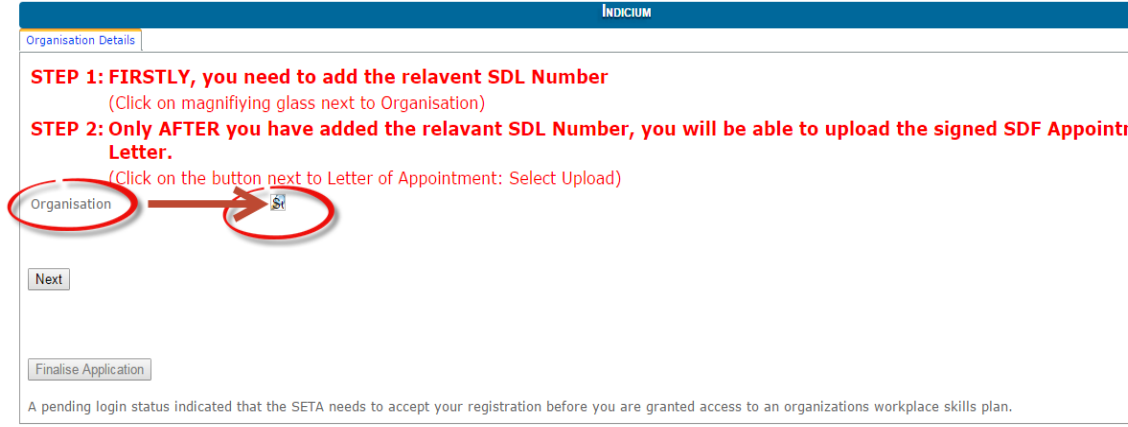
Document:	SDF Training Manual	
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Step	Action / Screenshot												
	<div> <div>INDICIUM</div> <div>Applicant Details</div> </div> <div> <div>ID No</div> <div></div> </div> <div> <div>Alternate ID Type</div> <div></div> </div> <div> <div>Title</div> <div></div> </div> <div> <div>First Name</div> <div></div> </div> <div> <div>Middle Name</div> <div></div> </div> <div> <div>Surname</div> <div></div> </div> <div> <div>Initials</div> <div></div> </div> <div> <div>Date of Birth</div> <div></div> </div> <div> <div>Gender</div> <div></div> </div> <div> <div>Equity</div> <div></div> </div> <p>Please note the following rules on this screen:</p> <table> <tr> <th>Field</th><th>Rule</th></tr> <tr> <td>ID NO</td><td> <p>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.</p> <p>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.</p> <p>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.</p> </td></tr> <tr> <td>Alternate ID Type</td><td>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.</td></tr> <tr> <td>Title</td><td> <p>Indicium will populate this field where the ID No is a valid SA No. However, the SDF can update as well.</p> <p>Indicium will not populate this field where the ID No is another type of number and the SDF will need to update this field.</p> </td></tr> <tr> <td>Initials</td><td>This is a populated field where Indicium will populate the field with the first letter of the First Name</td></tr> <tr> <td>Date of Birth</td><td> <p>Indicium will populate this field where the ID No is a valid SA No</p> <p>Indicium will not populate this field where the ID No is another type of number and the SDF will need to update this field.</p> </td></tr> </table>	Field	Rule	ID NO	<p>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.</p> <p>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.</p> <p>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.</p>	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	<p>Indicium will populate this field where the ID No is a valid SA No. However, the SDF can update as well.</p> <p>Indicium will not populate this field where the ID No is another type of number and the SDF will need to update this field.</p>	Initials	This is a populated field where Indicium will populate the field with the first letter of the First Name	Date of Birth	<p>Indicium will populate this field where the ID No is a valid SA No</p> <p>Indicium will not populate this field where the ID No is another type of number and the SDF will need to update this field.</p>
Field	Rule												
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Initials	This is a populated field where Indicium will populate the field with the first letter of the First Name												
Date of Birth	<p>Indicium will populate this field where the ID No is a valid SA No</p> <p>Indicium will not populate this field where the ID No is another type of number and the SDF will need to update this field.</p>												

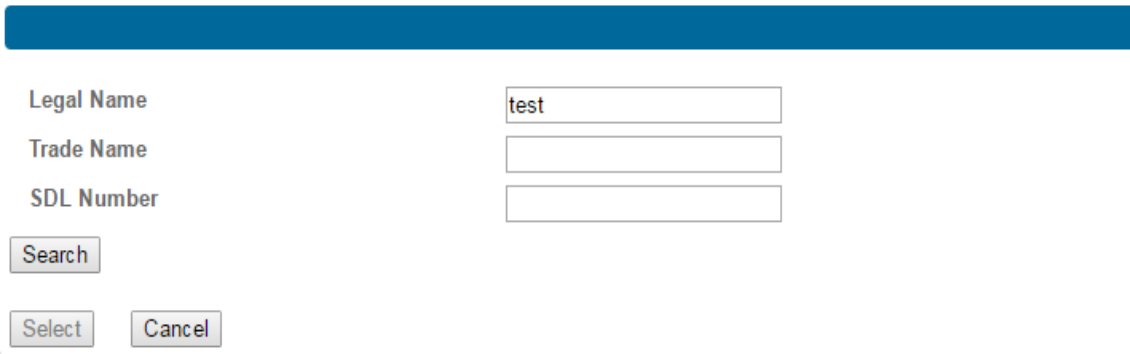
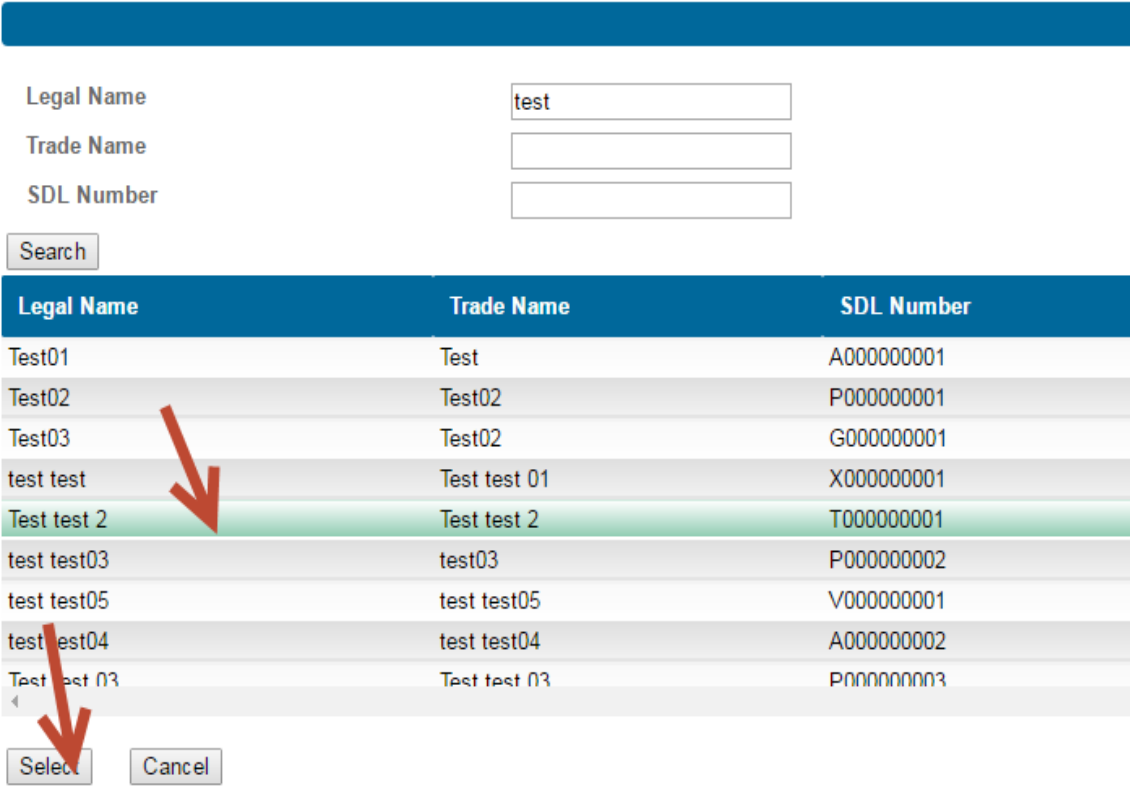
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Step	Action / Screenshot		
		Gender	Indicium will populate this field where the ID No is a valid SA No Indicium will not populate this field where the ID No is another type of number and the SDF will need to update this field.
		Telephone Number	This 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: <ul style="list-style-type: none"> • 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	<p>The SDF click's on the Save and Proceed button to submit the information captured.</p> <div style="text-align: center;">  </div>		
6	Indicium will direct the SDF to the following screen.		

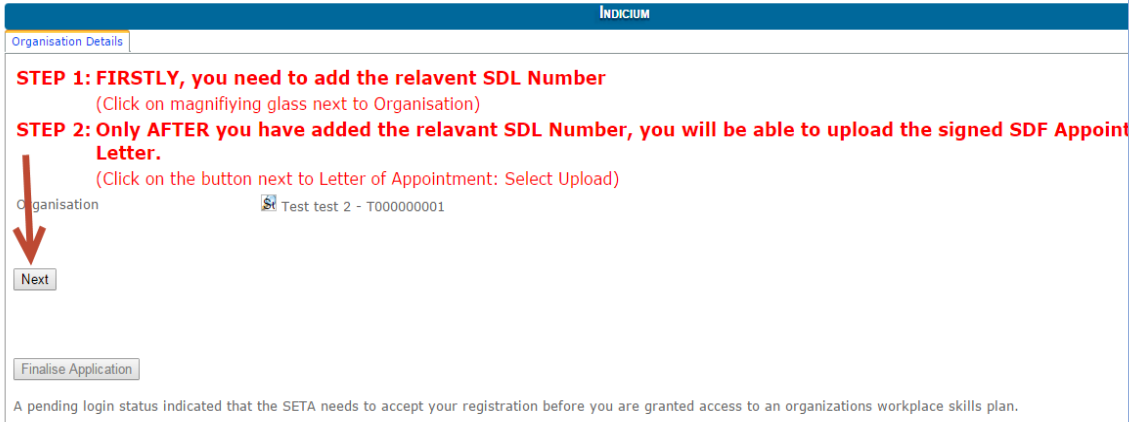

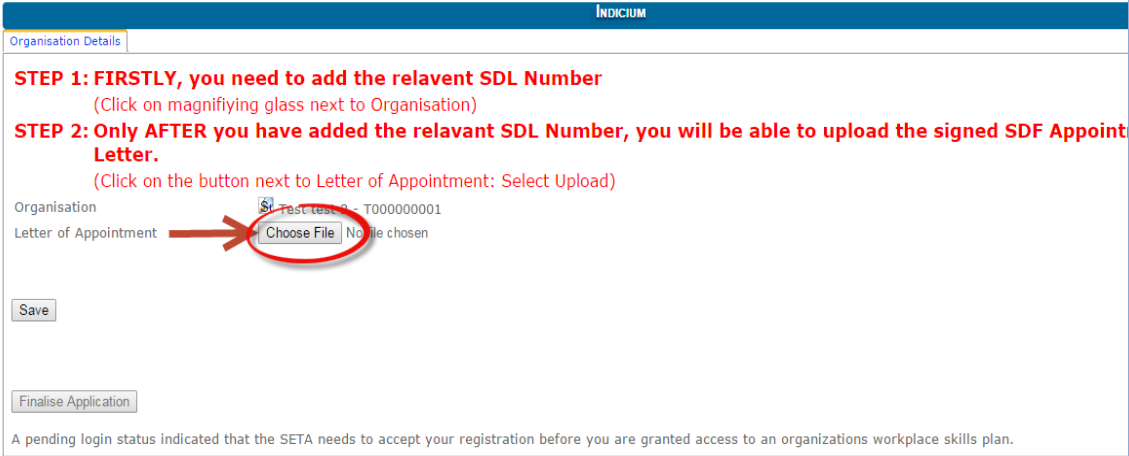


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Step	Action / Screenshot
	
7	<p>Step 1 – The SDF needs to link themselves to an SDL number.</p> <p>Click on the Magnifying glass next to the Organisation.</p> 
8	The following screen will display:

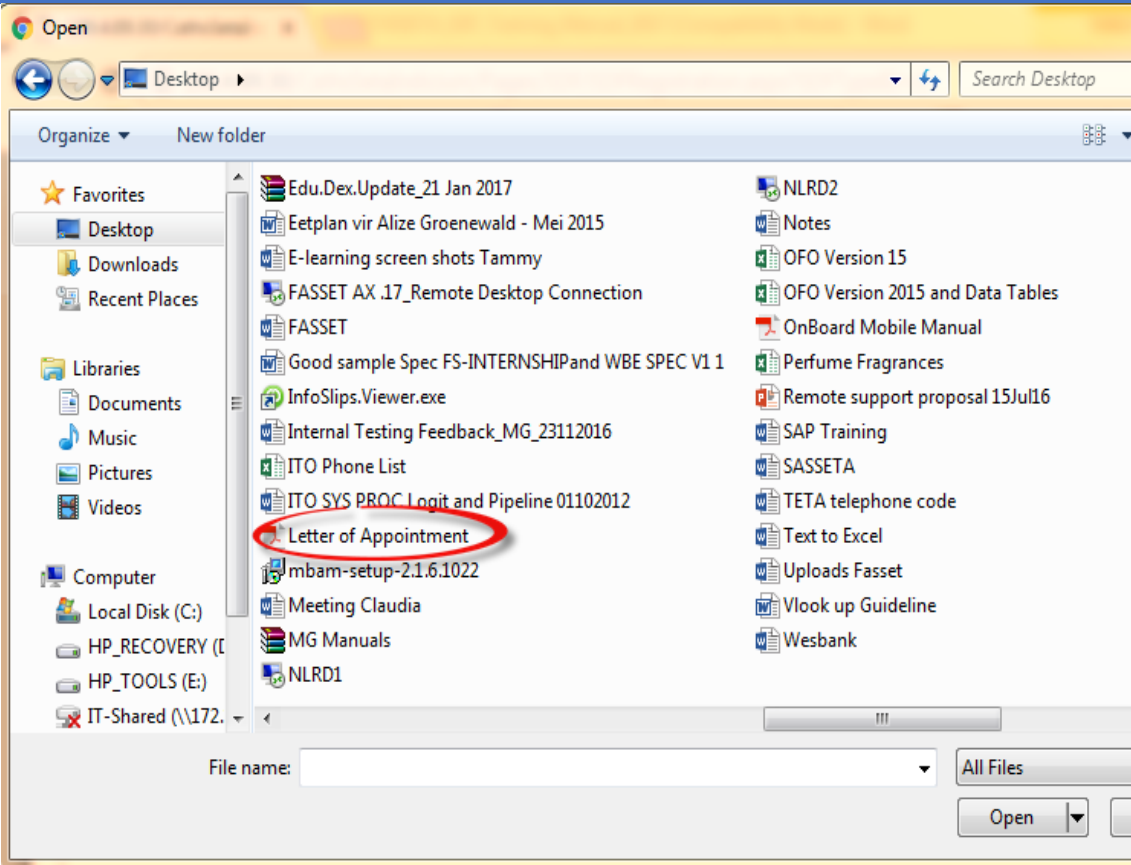
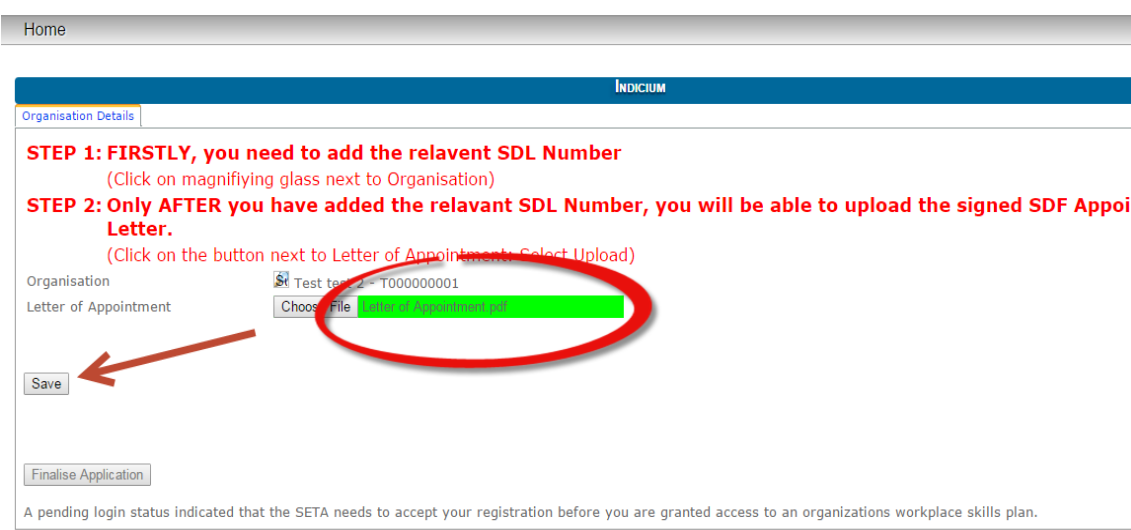
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Step	Action / Screenshot
	
9	Type in the Search Criteria for Legal Name OR Trade Name OR SDL number. Thereafter click on search.
10	The system will return all Entity's with the search criteria.
11	<p>To select the correct company, please click anywhere in the row – The row will turn Green in color once selected. Then click on select.</p> 
12	Once the company is linked to the SDF – Click on Next

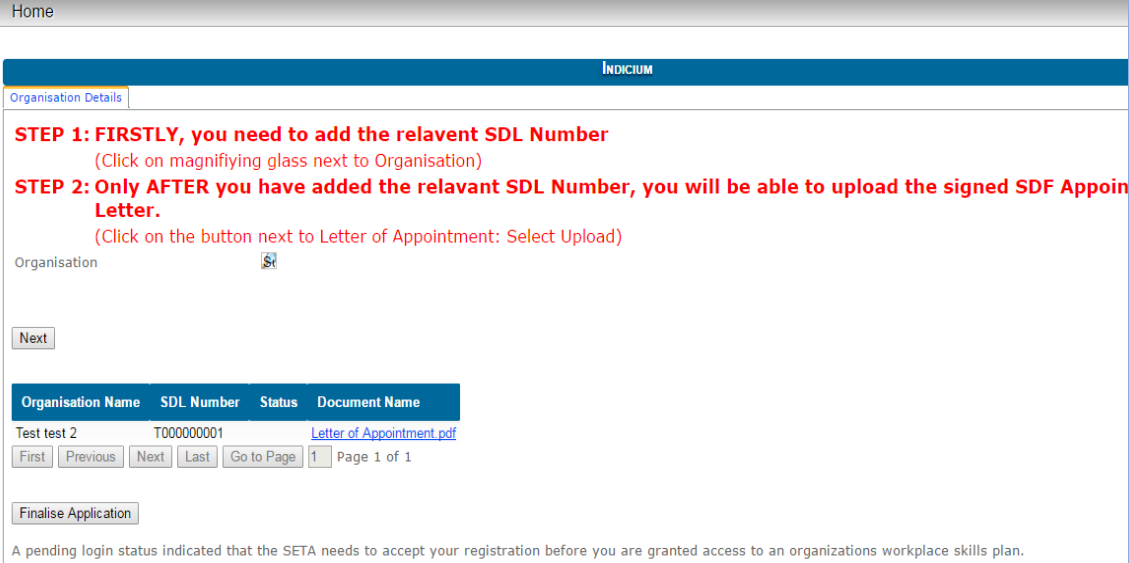
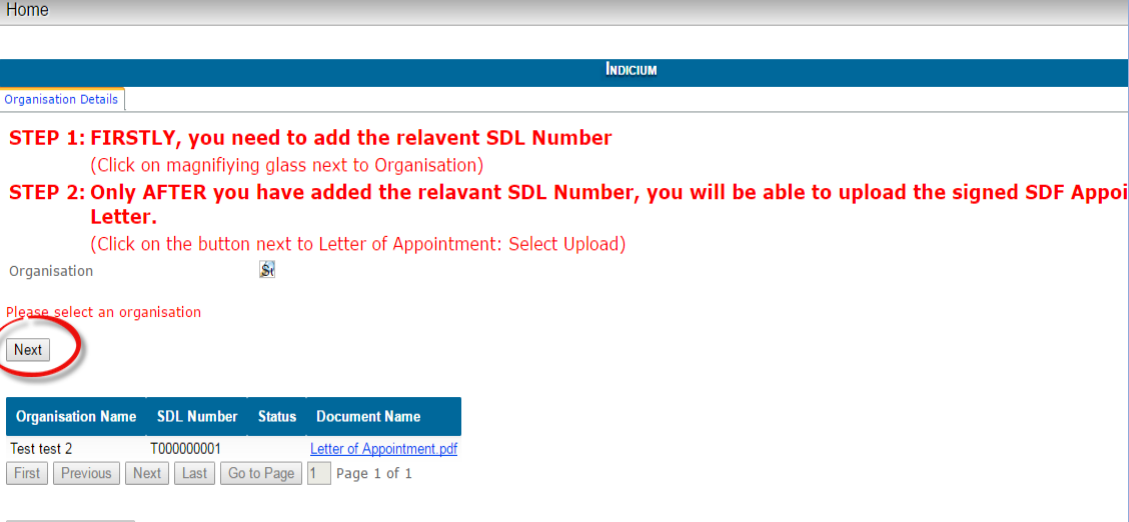
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Step	Action / Screenshot
	<p>Home</p>  <p>STEP 1: FIRSTLY, you need to add the relavent SDL Number (Click on magnifying glass next to Organisation)</p> <p>STEP 2: Only AFTER you have added the relavant SDL Number, you will be able to upload the signed SDF Appoint Letter. (Click on the button next to Letter of Appointment: Select Upload)</p> <p>Organisation  Test test 2 - T000000001</p> <p>Next</p> <p>Finalise Application</p> <p>A pending login status indicated that the SETA needs to accept your registration before you are granted access to an organizations workplace skills plan.</p>
13	<p>Step 2 – Upload Letter of Appointment. Click on the Choose File Button</p> <p>Home</p>  <p>STEP 1: FIRSTLY, you need to add the relavent SDL Number (Click on magnifying glass next to Organisation)</p> <p>STEP 2: Only AFTER you have added the relavant SDL Number, you will be able to upload the signed SDF Appoint Letter. (Click on the button next to Letter of Appointment: Select Upload)</p> <p>Organisation  Test test 2 - T000000001</p> <p>Letter of Appointment  No file chosen</p> <p>Save</p> <p>Finalise Application</p> <p>A pending login status indicated that the SETA needs to accept your registration before you are granted access to an organizations workplace skills plan.</p>
14	Direct to the uploaded PDF in your directory and then click on Open.

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

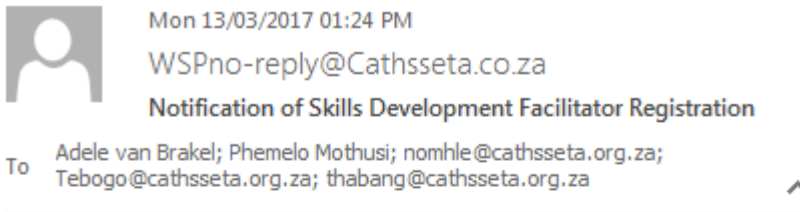
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Step	Action / Screenshot
	<p>Home</p> 
17	<p>If the SDF wants to link themselves to another Company click on the Next Button.</p> 
18	Follow the same steps as per point 7 to link to another company.
19	If the SDF requires to be linked to only one company,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

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Step	Action / Screenshot								
	<div><div>INDICIUM</div><div>Organisation Details</div><div><div><div><div>STEP 1: FIRSTLY, you need to add the relevant SDL Number</div><div>(Click on magnifying glass next to Organisation)</div></div><div><div>STEP 2: Only AFTER you have added the relevant SDL Number, you will be able to upload the signed SDF Appointment Letter.</div><div>(Click on the button next to Letter of Appointment: Select Upload)</div></div></div><div><div>Organisation</div><div></div></div><div>Please select an organisation</div><div><div>Next</div></div><div><table><thead><tr><th>Organisation Name</th><th>SDL Number</th><th>Status</th><th>Document Name</th></tr></thead><tbody><tr><td>Test test 2</td><td>T000000001</td><td></td><td>Letter of Appointment.pdf</td></tr></tbody></table><div><div>First</div><div>Previous</div><div>Next</div><div>Last</div><div>Go to Page</div><div>1</div><div>Page 1 of 1</div></div><div><div>Finalise Application</div></div><div>A pending login status indicated that the SETA needs to accept your registration before you are granted access to an organizations workplace skills plan.</div></div></div></div>	Organisation Name	SDL Number	Status	Document Name	Test test 2	T000000001		Letter of Appointment.pdf
Organisation Name	SDL Number	Status	Document Name						
Test test 2	T000000001		Letter of Appointment.pdf						
20	<p>Please note:</p> <p>A pending login status indicated that the SETA needs to accept your registration before you are granted access to an organizations workplace skills plan</p>								
21	<p>Once the application is finalised the SF will be directed back to the login page.</p>								
22	<p>An automated e-mail will be sent to the SDF</p> <div><div></div><div><div>Mon 13/03/2017 01:24 PM</div><div>WSPno-reply@Cathsseta.co.za</div><div>Acknowledgment of Skills Development Facilitator Registration</div></div></div> <div><div>To</div><div>Adele van Brakel</div></div> <div>13/03/2017</div> <div>SDF Registration for Adele van Brakel</div> <div>ID:7612190767082</div> <div>SDF Role:Primary</div> <div>Dear Adele van Brakel</div> <div>Company Name: Test test 2</div> <div>SDL No: T000000001</div> <div>Herewith confirmation that we have received your SDF registration for the above mentioned organization. We will attend to this request shortly.</div> <div>Your username and password is:</div> <div>Username: 7612190767082</div> <div>Password: van Brakel</div> <div>Kindly note that you will be required to change your password once logged in.</div>								
23	<p>An automated e-mail will also be sent to Cathsseta to evaluate the application.</p>								

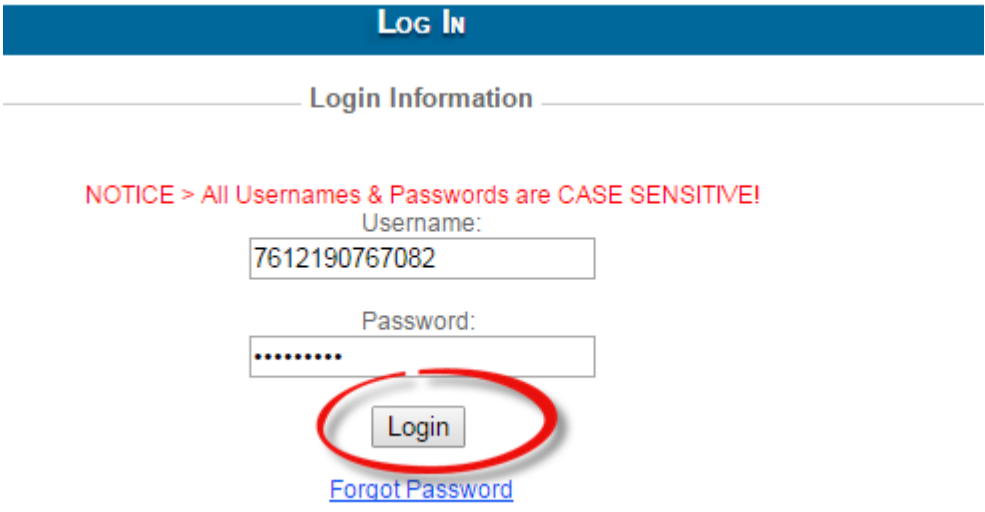
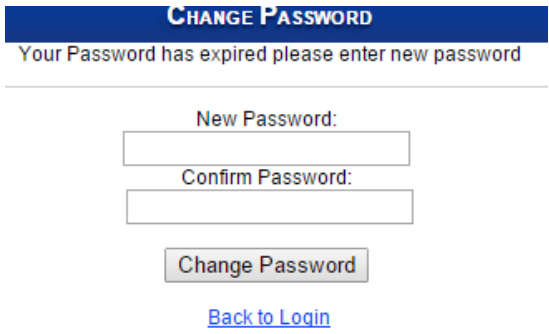
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Step	Action / Screenshot
	 <p>Mon 13/03/2017 01:24 PM WSPno-reply@Cathsseta.co.za Notification of Skills Development Facilitator Registration</p> <p>To Adele van Brakel; Phemelo Mothusi; nomhle@cathsseta.org.za; Tebogo@cathsseta.org.za; thabang@cathsseta.org.za</p> <hr/> <p>Please be advised that an SDF application has been submitted and awaits evaluation.</p> <p>Adele van Brakel</p> <p>7612190767082</p> <p>Test test 2</p> <p>T0000000001</p>
22	Upon successful evaluation the SDF will be informed via e-mail of the application.
23	If the status of the application is still not evaluated, please follow-up with Nomhle Shabangu from CATHSSETA.

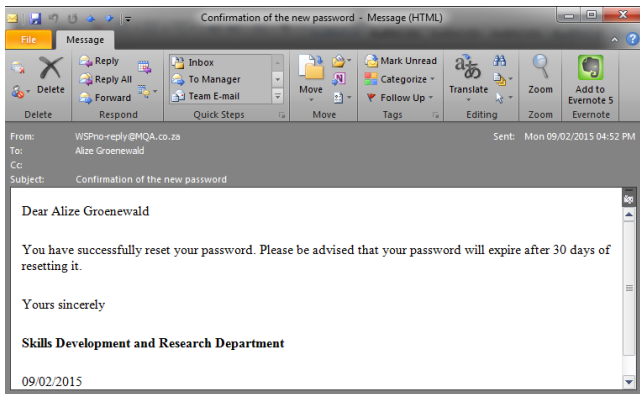
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3.1 SDF First Login

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	<p>The SDF enters the username and password that is sent in the acknowledgement and skills development facilitator email, received upon the submission of registration.</p> <p style="text-align: center;">Your username and password is:</p> <p style="text-align: center;">Username: 7612190767082 Password: van Brakel</p> <p>Note the username will remain the same but the SDF will need to change his/her password after a period of time.</p>
3	<p>The Indicium usernames and passwords are case sensitive!</p> 
4	<p>The SDF needs to click on the Login button once the Username and Password is entered.</p> <p>The SDF needs to enter a NEW Password, and CONFIRM the password.</p> 

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Step	Action / Screenshot												
	<p>Please note the following rules for creating passwords:</p> <table border="1"> <thead> <tr> <th>#</th><th>Rule</th></tr> </thead> <tbody> <tr> <td>1</td><td>The length of the password must be at least 8 characters long</td></tr> <tr> <td>2</td><td>Your password must contain one capital/upper case letter</td></tr> <tr> <td>3</td><td>Your password must at least contain one digit number</td></tr> <tr> <td>4</td><td>Your password must at least contain a symbol "{*&%\$#@</td></tr> <tr> <td>5</td><td>The password expires after 30 days, and the SDF will be required to enter a new password – each 30 days.</td></tr> </tbody> </table> <p>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.</p> <p style="text-align: center;">Change Password</p>	#	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.
#	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.												
5	<p>Indicium will send the SDF an e-mail notification upon successful changing of passwords.</p> 												



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.


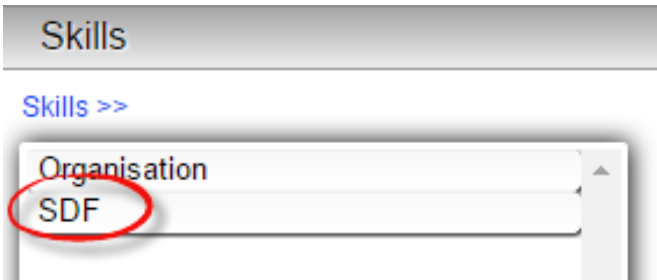
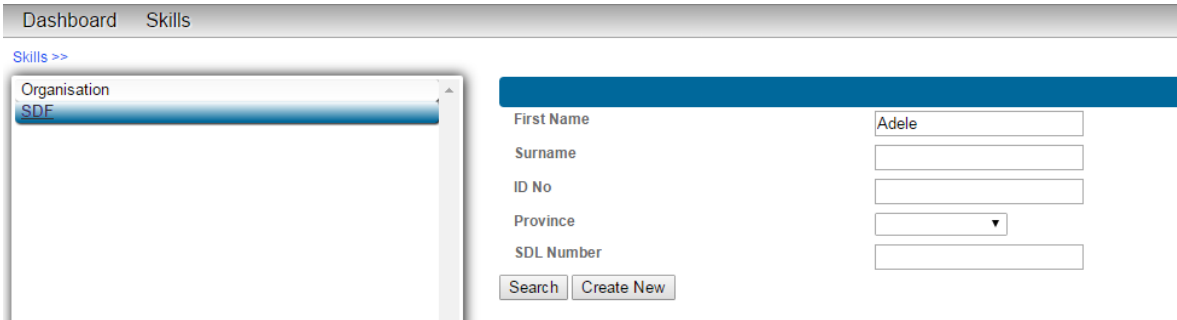
Note: The below steps can be followed in order to link all the required organisations to the SDF's profile

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

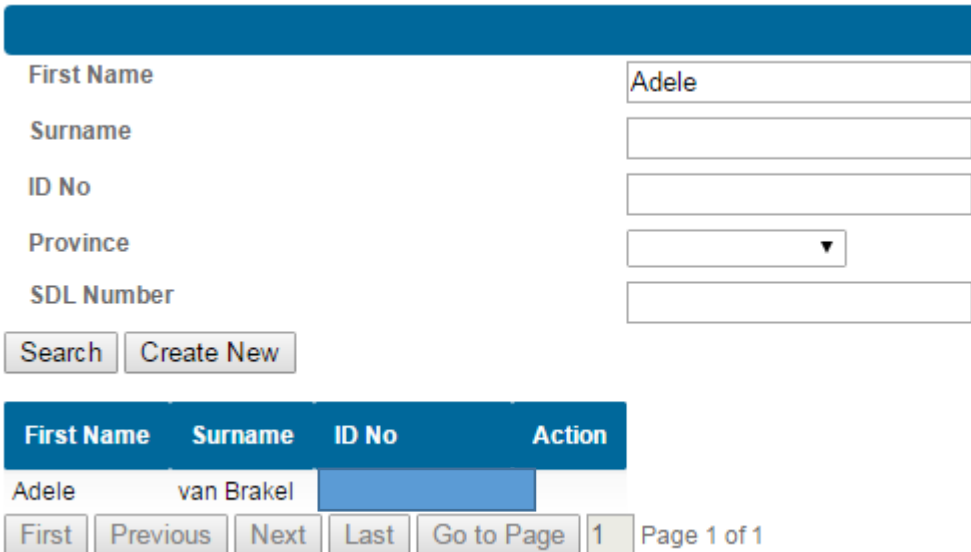
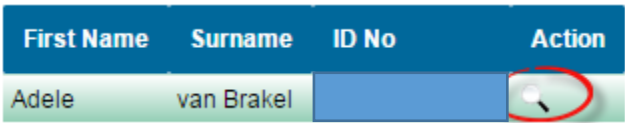
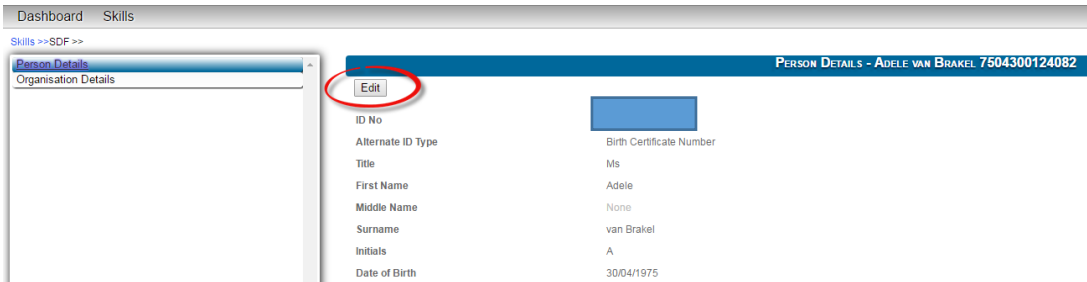
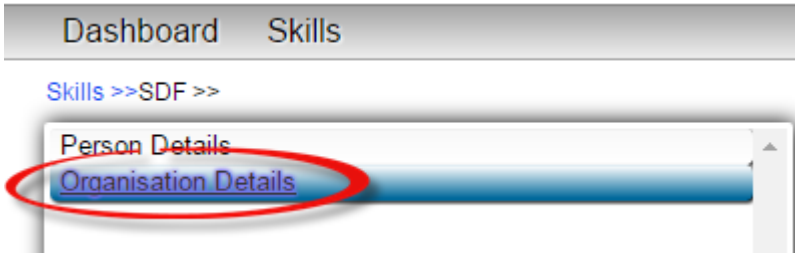
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Step	Action / Screenshot																					
	<div><div>SETA Management System</div><div>Switch Profile</div><div></div><div>Dashboard Skills</div><div><div>SDF Dashboard</div><div><div>SDF DASHBOARD - ADELE VAN BRAKEL 7504300124082</div><div>Financial Year</div><div><div>Your Details</div><div>Add Organisations</div></div><div>Click on any row below to access that specific organisations file</div><table><thead><tr><th>No.</th><th>Legal Name</th><th>SDL Number</th><th>SDF Access</th><th>Mandatory Grant Status</th><th>WSP Due Date</th><th>Action</th></tr></thead><tbody><tr><td>1</td><td>Sun international</td><td>A000000003</td><td>Approved</td><td>Created</td><td>30/04/2017</td><td></td></tr><tr><td>2</td><td>Sun International Management Ltd</td><td>V000000002</td><td>Rejected</td><td>Created</td><td>30/04/2017</td><td></td></tr></tbody></table><div><div>First</div><div>Previous</div><div>Next</div><div>Last</div><div>Go to Page</div><div>1</div><div>Page 1 of 1</div></div><div>IMPORTANT DOCUMENTATION</div></div></div></div>	No.	Legal Name	SDL Number	SDF Access	Mandatory Grant Status	WSP Due Date	Action	1	Sun international	A000000003	Approved	Created	30/04/2017		2	Sun International Management Ltd	V000000002	Rejected	Created	30/04/2017	
No.	Legal Name	SDL Number	SDF Access	Mandatory Grant Status	WSP Due Date	Action																
1	Sun international	A000000003	Approved	Created	30/04/2017																	
2	Sun International Management Ltd	V000000002	Rejected	Created	30/04/2017																	
4	<div>The SDF clicks on the Skills menu option.</div> <div><div><div>Indicium</div><div>SETA Management System</div></div><div>Welcome, Adele - Primary SDF</div><div>Log out</div><div>Switch Profile</div><div></div><div>Dashboard Skills</div><div><div>SDF Dashboard</div><div><div>SDF DASHBOARD - ADELE VAN BRAKEL</div><div>Financial Year</div><div><div>Your Details</div><div>Add Organisations</div></div><div>Click on any row below to access that specific organisations file</div><table><thead><tr><th>No.</th><th>Legal Name</th><th>SDL Number</th><th>SDF Access</th><th>Mandatory Grant Status</th><th>WSP Due Date</th><th>Action</th></tr></thead><tbody><tr><td>1</td><td>Sun international</td><td>A000000003</td><td>Approved</td><td>Created</td><td>30/04/2017</td><td></td></tr><tr><td>2</td><td>Sun International Management Ltd</td><td>V000000002</td><td>Rejected</td><td>Created</td><td>30/04/2017</td><td></td></tr></tbody></table><div><div>First</div><div>Previous</div><div>Next</div><div>Last</div><div>Go to Page</div><div>1</div><div>Page 1 of 1</div></div><div>IMPORTANT DOCUMENTATION</div></div></div></div>	No.	Legal Name	SDL Number	SDF Access	Mandatory Grant Status	WSP Due Date	Action	1	Sun international	A000000003	Approved	Created	30/04/2017		2	Sun International Management Ltd	V000000002	Rejected	Created	30/04/2017	
No.	Legal Name	SDL Number	SDF Access	Mandatory Grant Status	WSP Due Date	Action																
1	Sun international	A000000003	Approved	Created	30/04/2017																	
2	Sun International Management Ltd	V000000002	Rejected	Created	30/04/2017																	
5	<div>Indicium opens the page with two options:</div> <div><ul style="list-style-type: none">• Organisation• SDF</div> <div>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.</div>																					

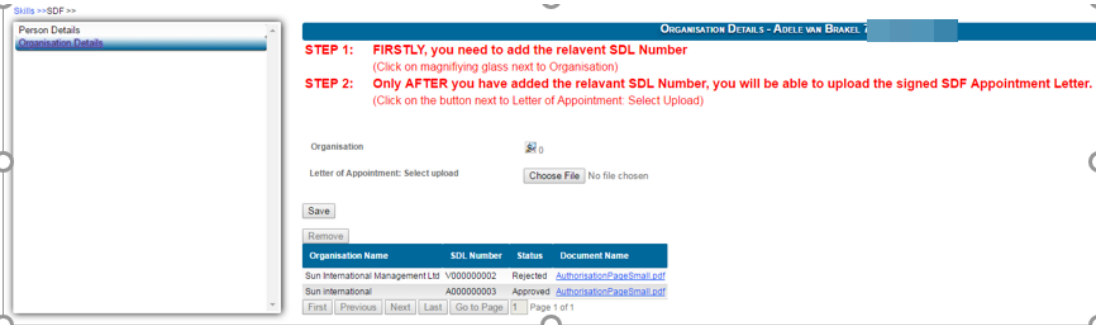
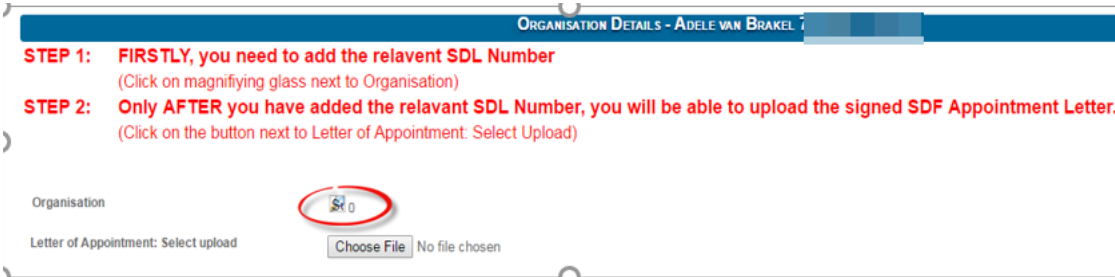
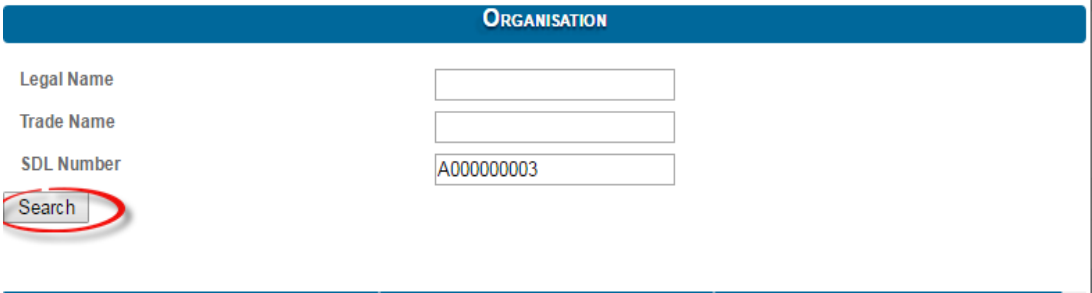
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Step	Action / Screenshot
	
6	<p>The SDF must click on the SDF menu option.</p> 
7	<p>Search for the SDF details by completing one of the filters on the page which opens on the right side of the screen. Once a filter is completed, click on the Search button</p> 
8	<p>Indicium will return the SDF details.</p>

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Step	Action / Screenshot
	 <p>The screenshot shows a search form with fields for First Name (Adele), Surname, ID No, Province, and SDL Number. Below the form are 'Search' and 'Create New' buttons. A table below the form displays search results with columns: First Name, Surname, ID No, and Action. The first row shows 'Adele van Brakel' with a blue 'Action' button. Navigation buttons (First, Previous, Next, Last, Go to Page 1) and 'Page 1 of 1' are at the bottom.</p>
9	<p>To access the SDF, select the row and then click on the Action button.</p>  <p>The screenshot shows the same table as above, but the 'Action' button for the first row is circled in red.</p>
10	<p>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.</p>  <p>The screenshot shows the 'PERSON DETAILS - ADELE VAN BRAKEL 7504300124082' page. On the left is a menu with 'Person Details' and 'Organisation Details'. The 'Edit' button next to the menu is circled in red. The main area shows personal details like ID No, Title, First Name, Middle Name, Surname, Initials, and Date of Birth.</p>
11	<p>The SDF must select the Organisation Details option from the menu.</p>  <p>The screenshot shows the same menu as above, but 'Organisation Details' is circled in red.</p>

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Step	Action / Screenshot
12	<p>Indicium will open a page on the right hand side allowing the SDF to search for the organisations required.</p> 
13	<p>The SDF clicks on the magnifying glass to open the Organisation search screen.</p>  <p>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.</p> 
14	Indicium returns the results for the criteria used.

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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

The SDF will select the organisation by clicking once on the name.

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

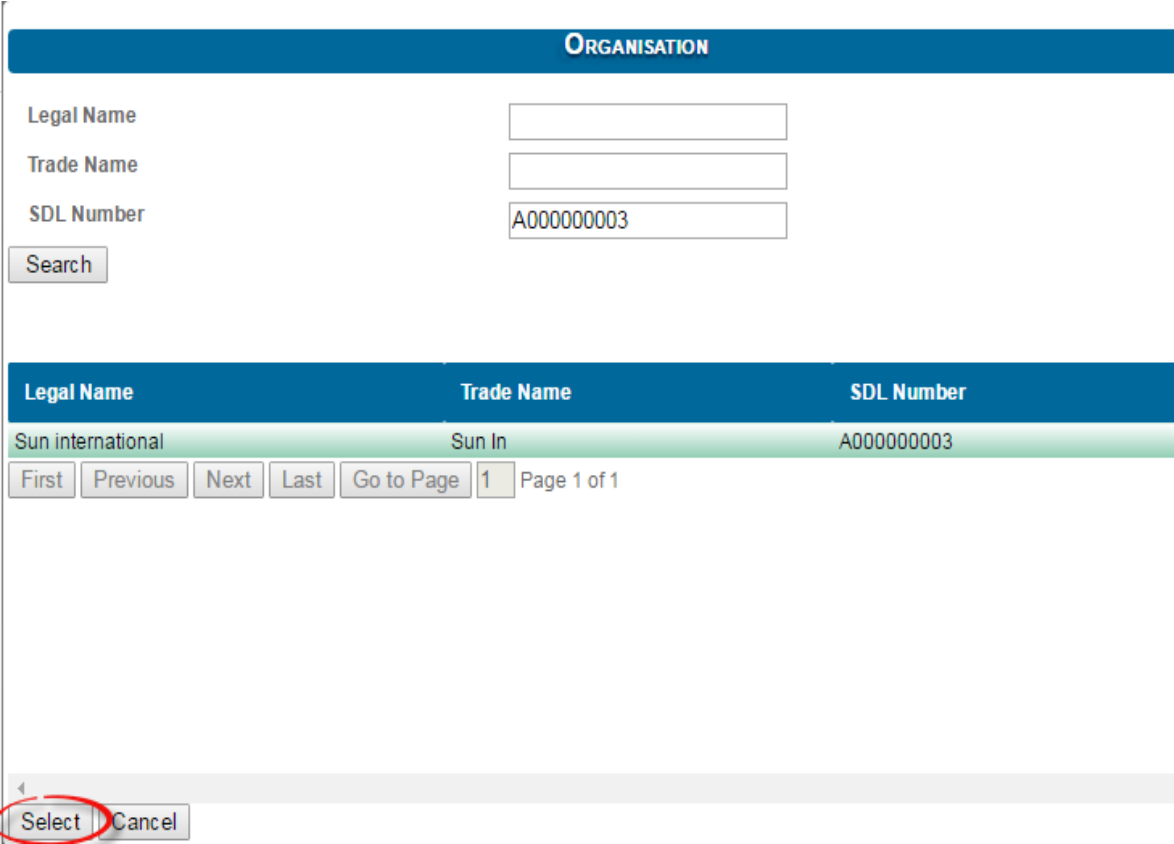
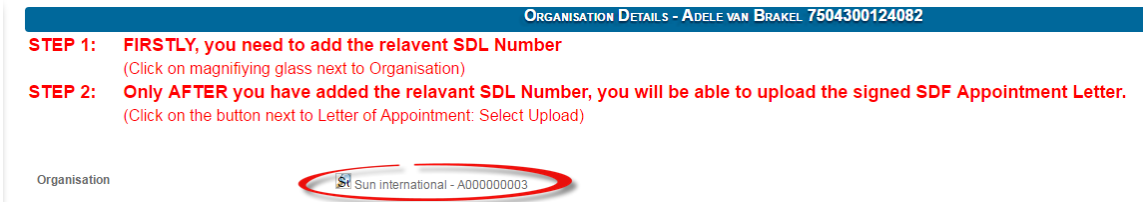
1

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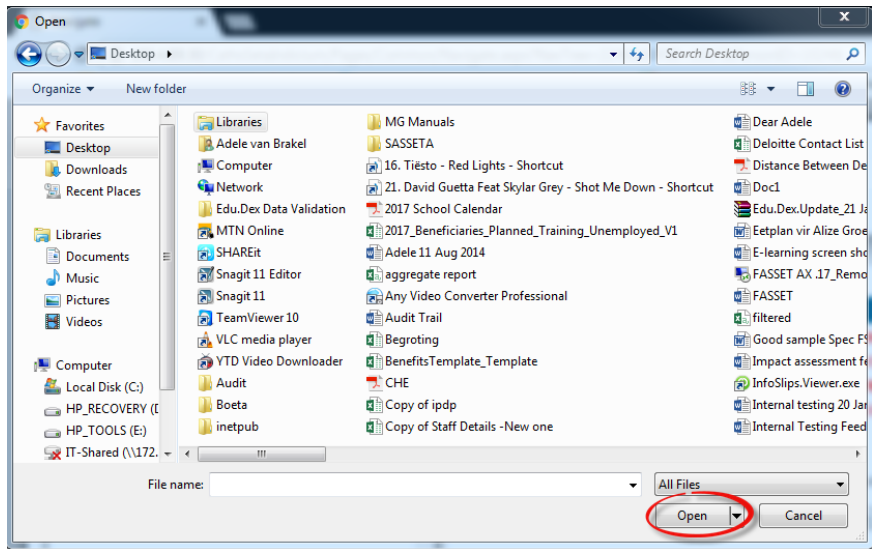
Select

Cancel

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Step	Action / Screenshot
	<p>(Indicium will highlight the organisation in green). Once the row has turned green, click on the Select button.</p> 
15	<p>Indicium adds the details of the organisation in the Organisation field.</p> 
16	<p>The SDF needs to upload the Letter of Appointment by clicking on the Choose File button.</p>

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Step	Action / Screenshot												
	<div><div>ORGANISATION DETAILS - ADELE VAN BRAKEL 7504300124082</div><div><div>STEP 1: FIRSTLY, you need to add the relavant SDL Number (Click on magnifying glass next to Organisation)</div><div>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)</div></div><div><div>Organisation</div><div>Sun international - A000000003</div><div>Letter of Appointment: Select upload</div><div>Choose FileNo file chosen</div></div></div> <div>17</div> <div><p>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.</p><div></div></div> <div>18</div> <div><p>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.</p><div><div>Organisation</div><div>Sun international - A000000003</div><div>Letter of Appointment: Select upload</div><div>Choose File2017 School Calendar.pdf</div><div>Save</div></div></div> <div>19</div> <div><p>Indicium will link the organisation to the SDF, displaying the details as follows:</p><table><thead><tr><th>Organisation Name</th><th>SDL Number</th><th>Status</th><th>Document Name</th></tr></thead><tbody><tr><td>Sun International Management Ltd</td><td>V000000002</td><td>Rejected</td><td>AuthorisationPageSmall.pdf</td></tr><tr><td>Sun international</td><td>A000000003</td><td>Approved</td><td>AuthorisationPageSmall.pdf</td></tr></tbody></table></div>	Organisation Name	SDL Number	Status	Document Name	Sun International Management Ltd	V000000002	Rejected	AuthorisationPageSmall.pdf	Sun international	A000000003	Approved	AuthorisationPageSmall.pdf
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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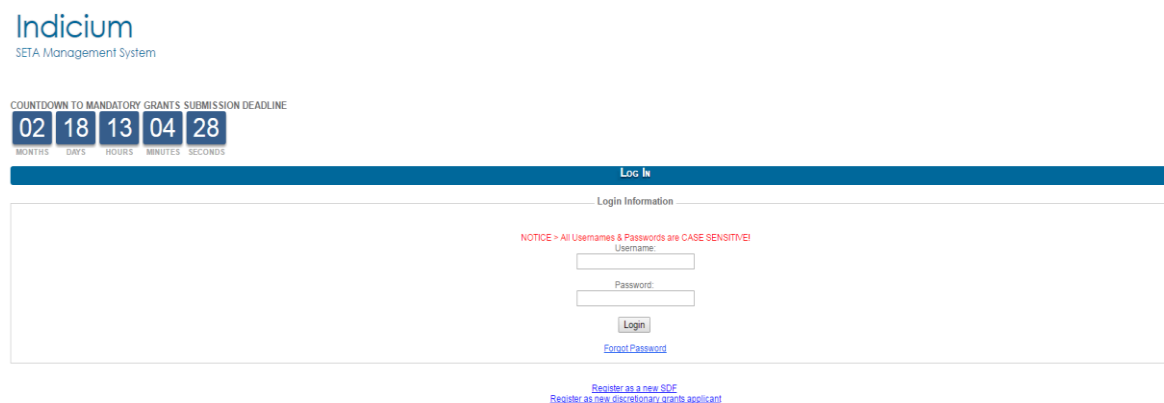
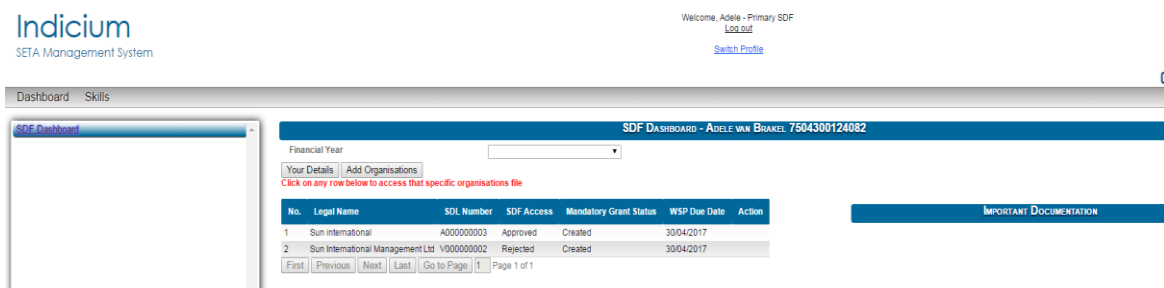
Step	Action / Screenshot										
20	<p>The Status of the SDF for the organisations linked, will show Pending until the SDF has completed the updates on the organisation and uploads the letter of Appointment. This will be discussed further in this document.</p> <table><tr><th>Organisation Name</th><th>SDL Number</th><th>Status</th><th>Role</th><th>Document Name</th></tr><tr><td>AMPLATS MANAGEMENT SERVICES</td><td>L350733343</td><td>Pending</td><td>Primary SDF</td><td>Testing.docx</td></tr></table>	Organisation Name	SDL Number	Status	Role	Document Name	AMPLATS MANAGEMENT SERVICES	L350733343	Pending	Primary SDF	Testing.docx
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


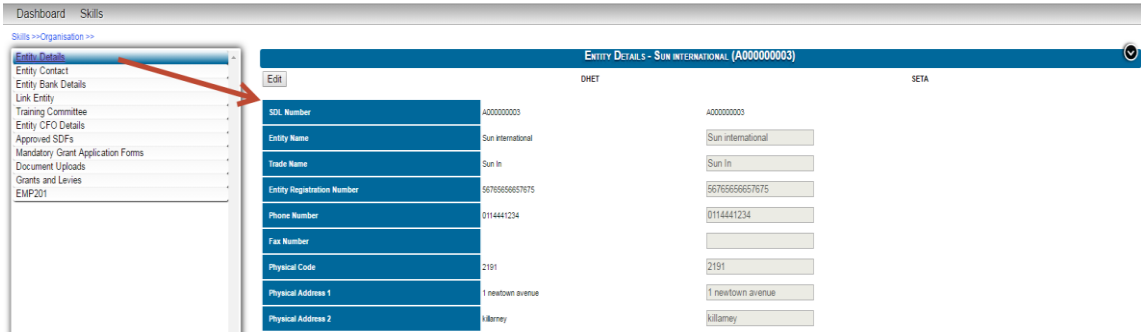
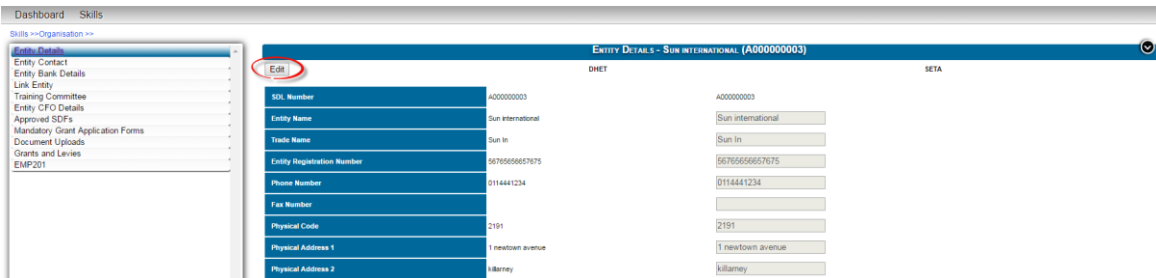
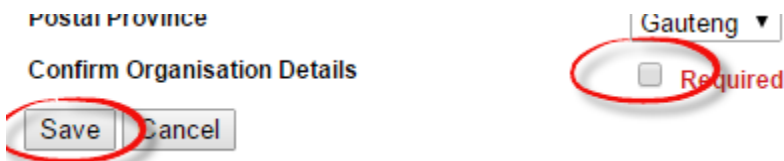
The SDF needs to ensure and confirm that the Organisation details are up to date.

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

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Step	Action / Screenshot
	<div><div><div>Indicium</div><div>SETA Management System</div></div><div><div>Welcome, Adele - Primary SD</div><div>Log out</div><div>Switch Profile</div></div></div> <div><div><div>Dashboard</div><div>Skills</div></div><div><div>Skills >></div><div><div>Organisation</div><div>SDF</div></div></div><div>SETA MANAGEMENT SYSTEM</div></div>
4	<p>The SDF must click on the Organisation menu option.</p> <div><div>Skills</div><div><div>Skills >></div><div><div>Organisation</div><div>SDF</div></div></div></div>
5	<p>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</p> <div><div><div>Dashboard</div><div>Skills</div></div><div><div>Skills >></div><div><div>Organisation</div><div>SDF</div></div></div><div><div>Legal Name</div><div>Trade Name</div><div>SDL Number</div><div>SIC Code</div><div>SDF Name</div><div>Search</div></div><div><div>ORGANISATION</div><div><div></div><div></div><div></div><div></div><div></div></div></div></div>
6	<p>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.</p> <div><div><div>Legal Name</div><div>Trade Name</div><div>SDL Number</div><div>SIC Code</div><div>SDF Name</div><div>Search</div></div><div><div>sun international</div><div></div><div></div><div></div><div></div></div><div><div>Legal Name</div><div>Trade Name</div><div>SDL Number</div><div>SIC Code</div><div>Parent SDL Number</div><div>Action</div></div><div><div>Sun international</div><div>Sun In</div><div>A000000003</div><div>Activities of Artists and Entertainers</div><div></div><div></div></div><div><div>First</div><div>Previous</div><div>Next</div><div>Last</div><div>Go to Page</div><div>1</div><div>Page 1 of 1</div></div></div>
7	<p>To access the organisation details, select or highlight by clicking on the organisation name and then click on the Action button.</p>

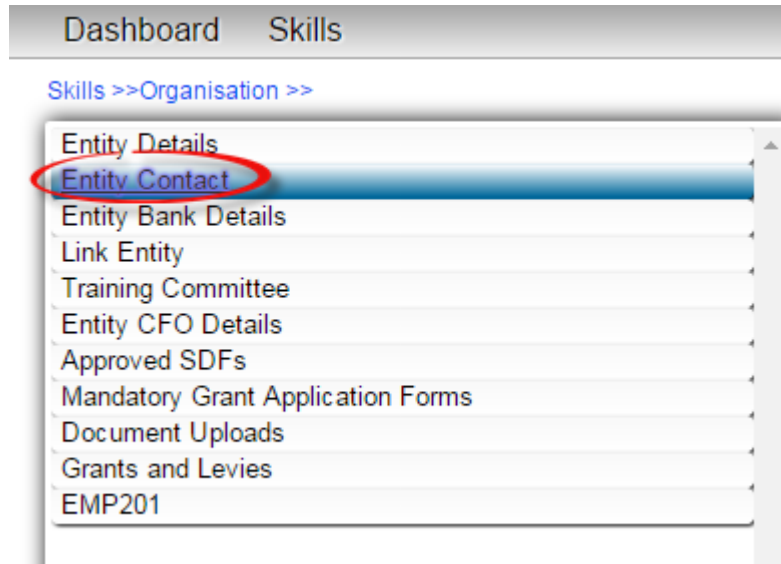
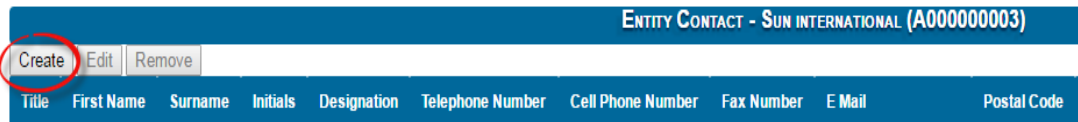
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Step	Action / Screenshot
	
8	<p>Indicium opens the Entity profile, on the Entity Details screen.</p> 
9	<p>To edit or update the entity details the SDF will click the Edit button for Indicium to enable the fields for editing.</p> 
10	<p>The SDF must 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.</p> 

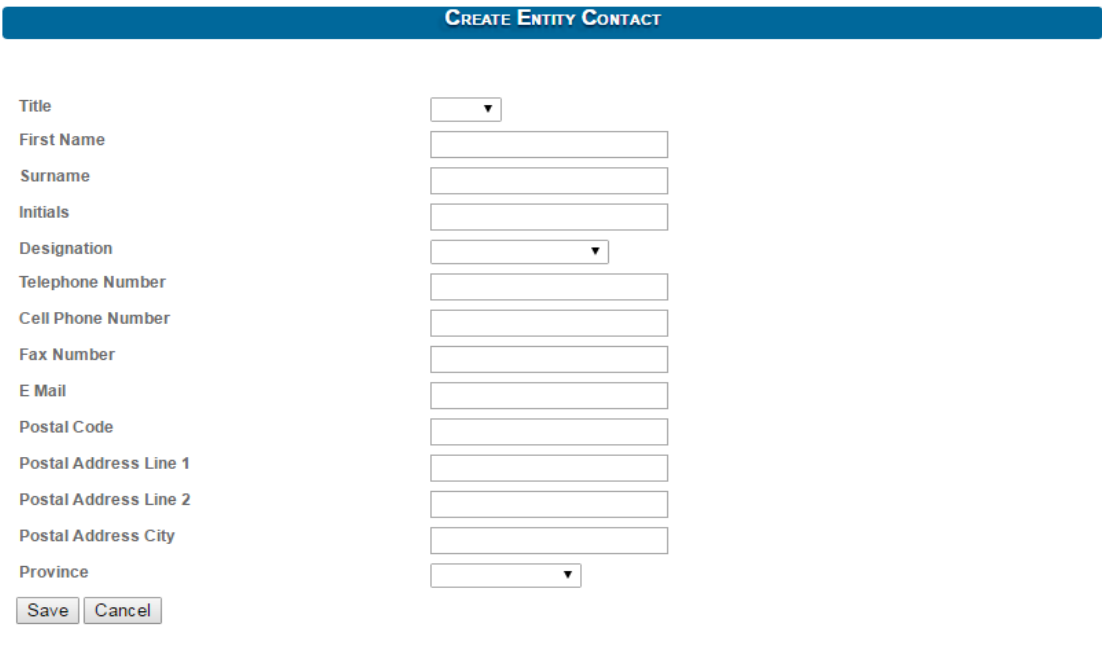



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3.3.2 Organisation Contact Person Details

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	<p>To add or edit or remove the Entity Contact, the SDF will click on the Entity Contact menu option.</p> 
3	<p>To Create a new contact, the SDF will click on the Create button.</p> 
4	<p>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.</p>

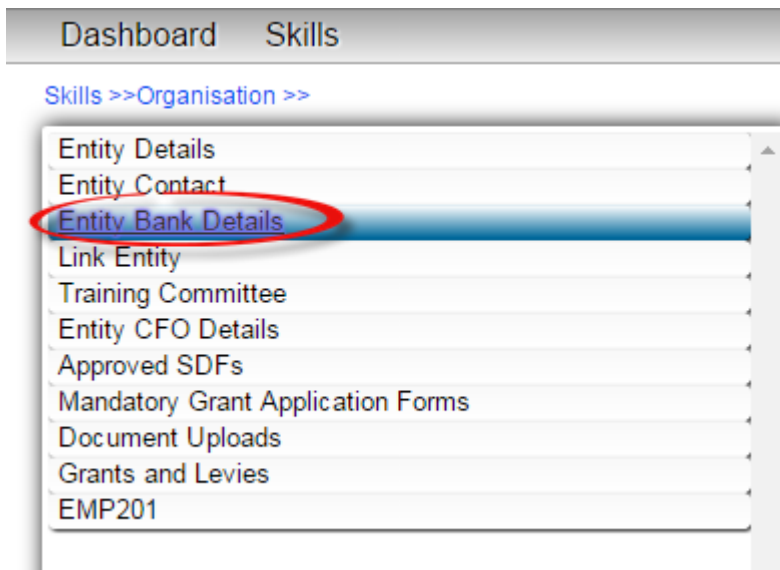
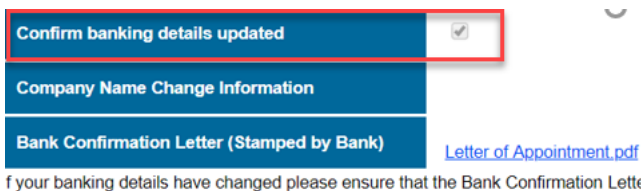
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Step	Action / Screenshot
	
5	<p>Indicium saves the information on the Entity Contact screen.</p> 
6	<p>To Edit the specific contact details, select the contact from the list and click on the Edit button to open the contact details page. Update the details required and click on the Save button.</p> 
7	<p>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.</p> 

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3.3.3 Entity Bank Details

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

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

3.3.4 Linking Child Entity




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

Step	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								
	<div><div>DashboardSkills</div><div>Skills >>Organisation >></div><div><div>Entity Details</div><div>Entity Contact</div><div>Entity Bank Details</div><div>Link Entity</div><div>Training Committee</div><div>Entity CFO Details</div><div>Approved SDFs</div><div>Mandatory Grant Application Forms</div><div>Document Uploads</div><div>Grants and Levies</div><div>EMP201</div></div></div>								
3	<p>Indiciu 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 Indiciu to return the information.</p> <div><div></div><div><div>Legal Name</div><div>Trade Name</div><div>SDL Number</div><div>Search</div></div><div><div></div><div></div><div>L210740595</div></div></div>								
4	<p>Indiciu 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.</p> <div><div></div><div><div>Legal Name</div><div>Trade Name</div><div>SDL Number</div><div>Search</div></div><div><div>L210740595</div></div><div><table><thead><tr><th>Select</th><th>Legal Name</th><th>Trade Name</th><th>SDL Number</th></tr></thead><tbody><tr><td><input checked="" type="checkbox"/></td><td>HYDROSOL PLATINUM TECHNOLOGIES</td><td>HYDROSOL PLATINUM TECHNOLOGIES</td><td>L210740595</td></tr></tbody></table><div><div>Link Child Organisations</div><div>Cancel</div></div></div></div>	Select	Legal Name	Trade Name	SDL Number	<input checked="" type="checkbox"/>	HYDROSOL PLATINUM TECHNOLOGIES	HYDROSOL PLATINUM TECHNOLOGIES	L210740595
Select	Legal Name	Trade Name	SDL Number						
<input checked="" type="checkbox"/>	HYDROSOL PLATINUM TECHNOLOGIES	HYDROSOL PLATINUM TECHNOLOGIES	L210740595						
6	<p>Indiciu will link the organisation selected in step 5 to the Main (Parent) Organisation.</p>								

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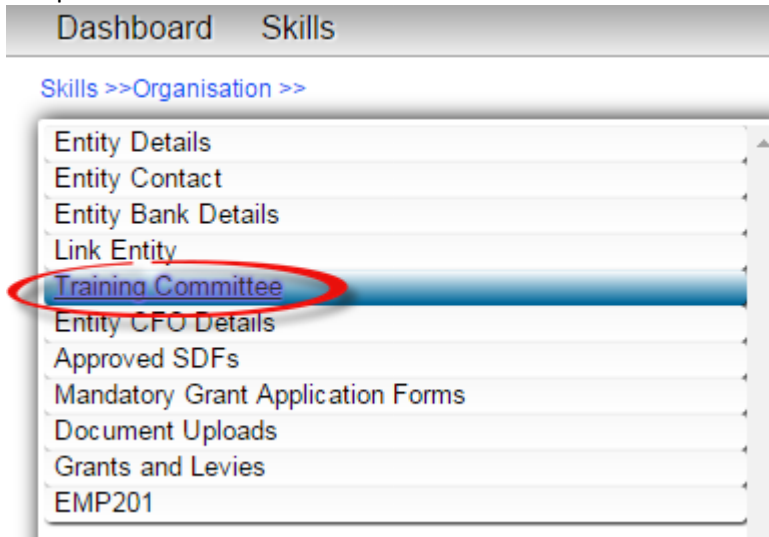
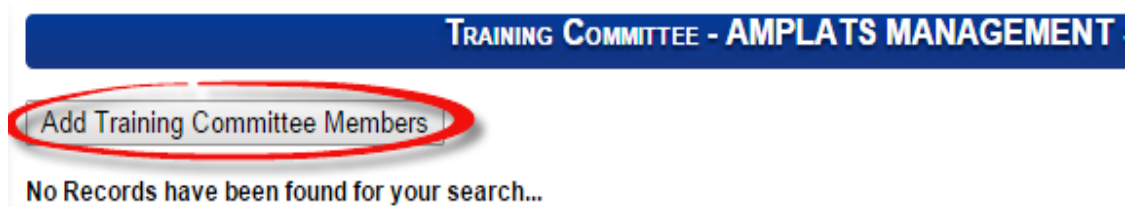
Step	Action / Screenshot
	
7	<p>To View the specific child organisation, select the organisation from the list and click on the View Child button to open the organisation details page of the child organisation.</p> 
8	<p>To Remove the specific child organisation if incorrectly linked, select the organisation from the list and click on the Remove button.</p> 

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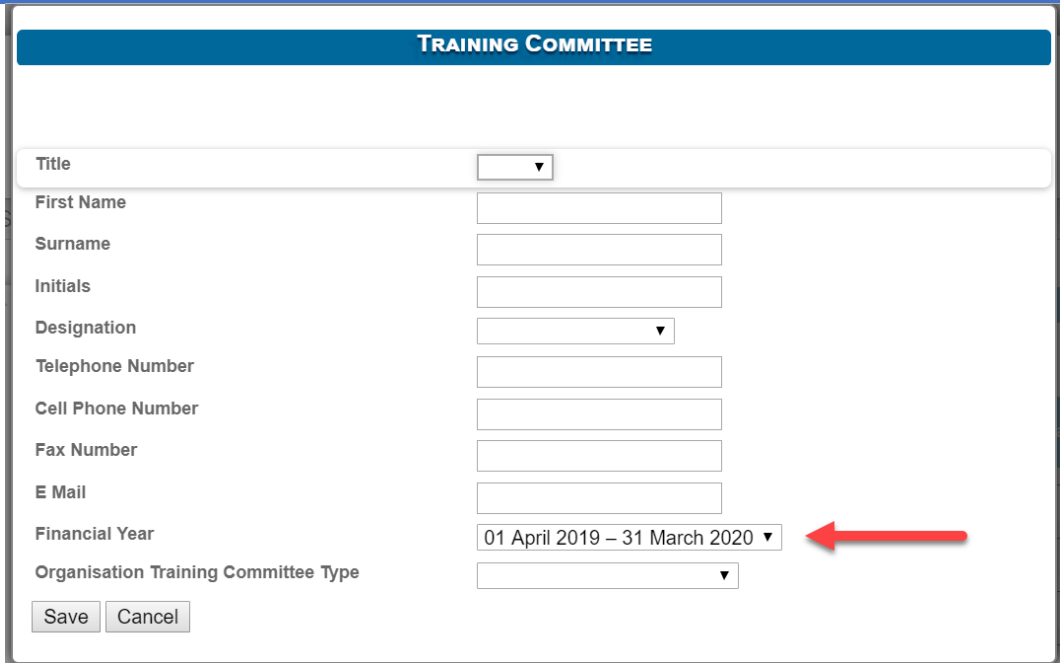

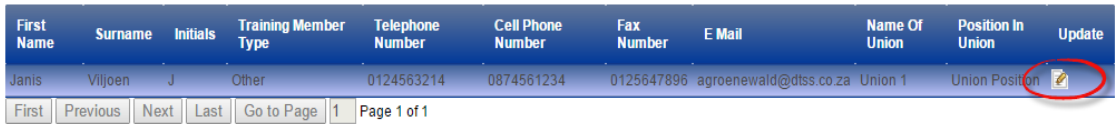
3.3.5 Training Committee

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.

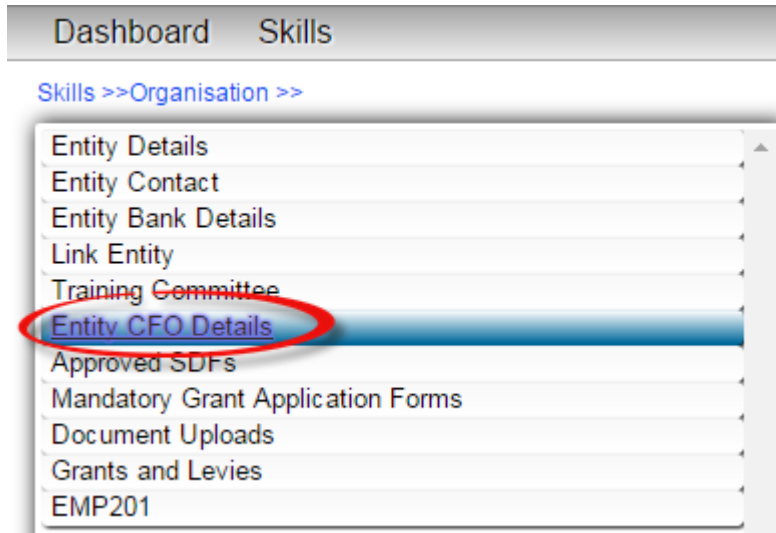
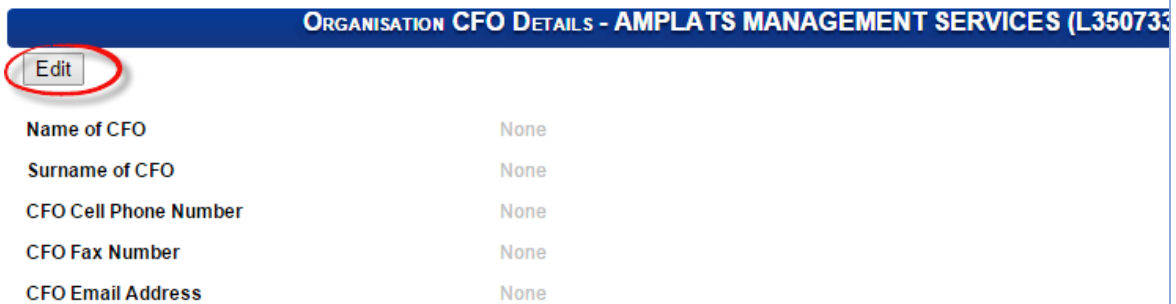

Step	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	<p>To add Training Committee Members to the organisation, the SDF will click on the Training Committee menu option.</p> 
3	<p>The SDF will click on the Add Training Committee Members button to open the Training Committee window.</p> 
4	<p>Indicium 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. Note: Indicium will default to the current Financial Year.</p>

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Step	Action / Screenshot
	
5	<p>Indicium will save the training committee member on the Training Committee page.</p> 
6	<p>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.</p> 

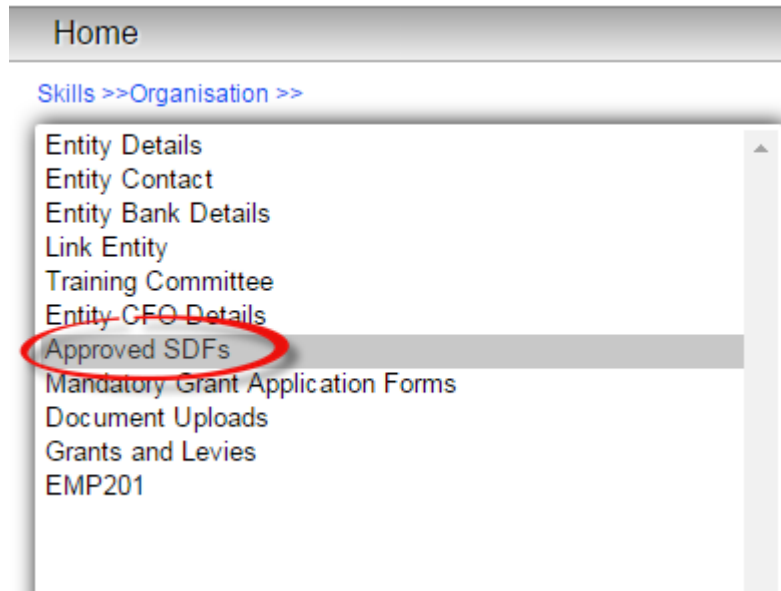
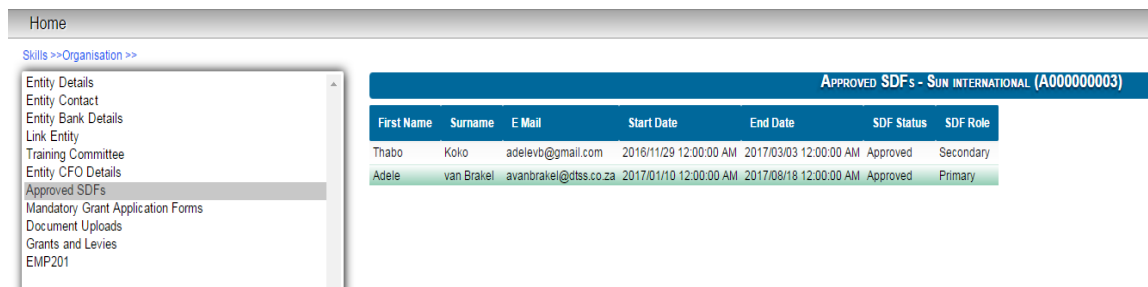
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3.3.1 Entity CFO Details

Step	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	<p>To add CFO Details to the organisation the SDF will click on the Organisation CFO Details menu option.</p> 
3	<p>The SDF will click on the Edit button to enable the fields for editing.</p> 
4	<p>The SDF must click on the Save button to save the details.</p> 

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3.3.1 Approved SDF's

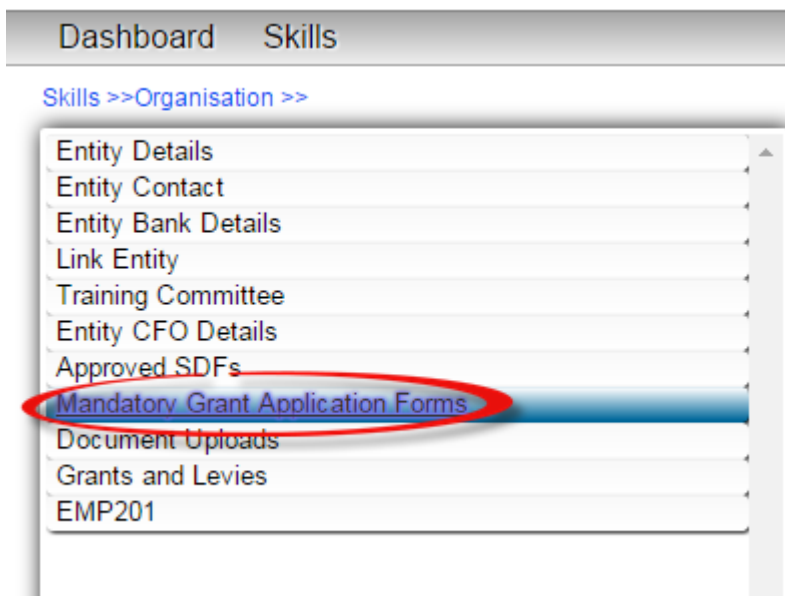
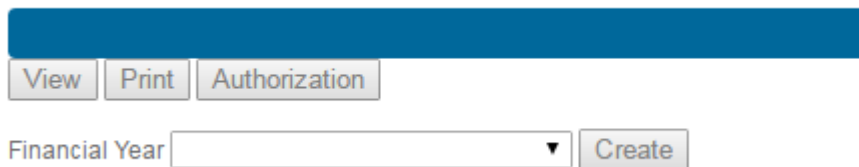
Step	Action / Screenshot																					
1	Follow steps 1 – 7 in section 7.1																					
2	<p>To view the Approved SDF’s click on Approved SDF’s</p>  <p>The screenshot shows a web application interface. At the top is a 'Home' button. Below it is a breadcrumb trail 'Skills >> Organisation >>'. A dropdown menu is open, listing various options: Entity Details, Entity Contact, Entity Bank Details, Link Entity, Training Committee, Entity CFO Details, Approved SDFs (highlighted with a red circle), Mandatory Grant Application Forms, Document Uploads, Grants and Levies, and EMP201.</p>																					
3	<p>The SDF will be able to view the Approved SDF’s link to this company.</p>  <p>The screenshot shows the 'Approved SDFs' page. It has a 'Home' button and a breadcrumb trail 'Skills >> Organisation >>'. On the left is a dropdown menu with 'Approved SDFs' selected. The main content area displays a table titled 'APPROVED SDFs - SUN INTERNATIONAL (A000000003)'. The table has columns for First Name, Surname, E Mail, Start Date, End Date, SDF Status, and SDF Role. Two rows are visible: Thabo Koko and Adele van Brakel.</p> <table><thead><tr><th>First Name</th><th>Surname</th><th>E Mail</th><th>Start Date</th><th>End Date</th><th>SDF Status</th><th>SDF Role</th></tr></thead><tbody><tr><td>Thabo</td><td>Koko</td><td>adelevb@gmail.com</td><td>2016/11/29 12:00:00 AM</td><td>2017/03/03 12:00:00 AM</td><td>Approved</td><td>Secondary</td></tr><tr><td>Adele</td><td>van Brakel</td><td>avanbrakel@dtss.co.za</td><td>2017/01/10 12:00:00 AM</td><td>2017/08/18 12:00:00 AM</td><td>Approved</td><td>Primary</td></tr></tbody></table>	First Name	Surname	E Mail	Start Date	End Date	SDF Status	SDF Role	Thabo	Koko	adelevb@gmail.com	2016/11/29 12:00:00 AM	2017/03/03 12:00:00 AM	Approved	Secondary	Adele	van Brakel	avanbrakel@dtss.co.za	2017/01/10 12:00:00 AM	2017/08/18 12:00:00 AM	Approved	Primary
First Name	Surname	E Mail	Start Date	End Date	SDF Status	SDF Role																
Thabo	Koko	adelevb@gmail.com	2016/11/29 12:00:00 AM	2017/03/03 12:00:00 AM	Approved	Secondary																
Adele	van Brakel	avanbrakel@dtss.co.za	2017/01/10 12:00:00 AM	2017/08/18 12:00:00 AM	Approved	Primary																

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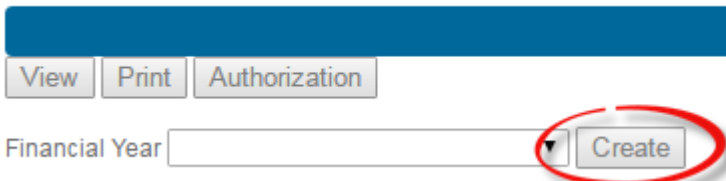
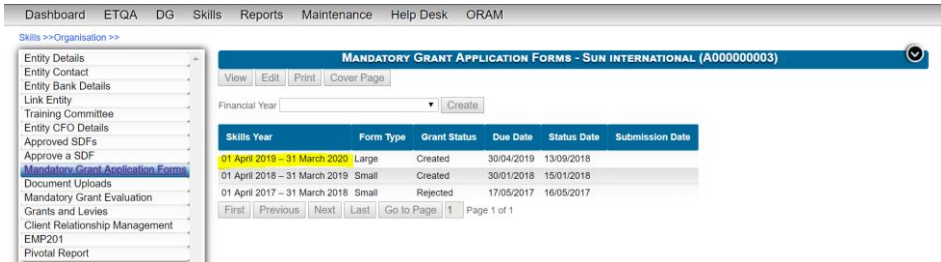
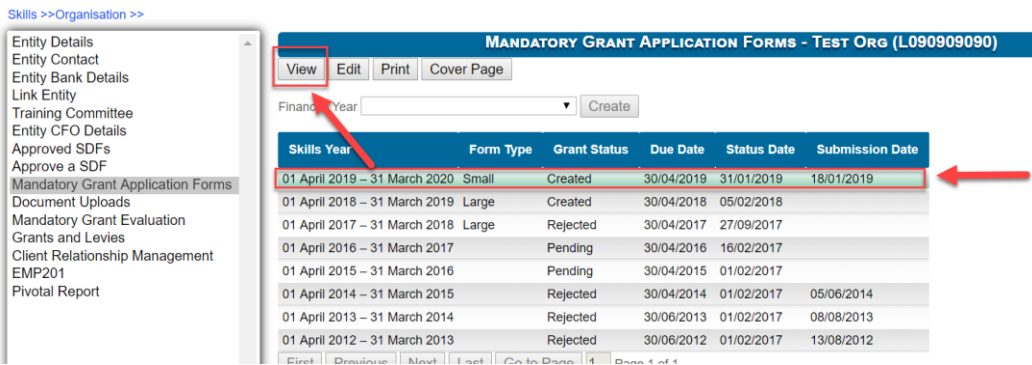

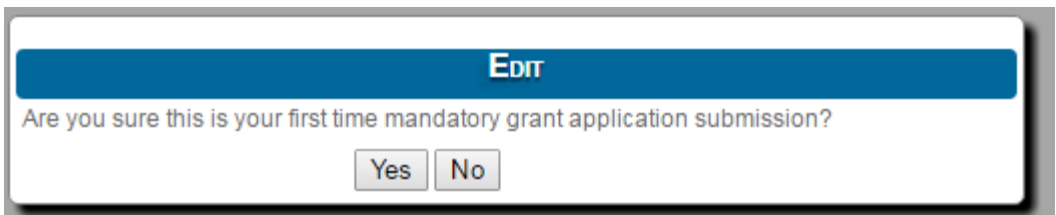
4 Mandatory Grant Online Application Functionality

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	<p>Select the Mandatory Grant Application Forms</p> 
3	<p>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.</p>
4	<p>Select the Financial Year from the dropdown 1 April 2019 to 31 March 2020</p> 
5	Then click on the Create button

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Step	Action / Screenshot
	
6	<p>A new row will be added for the new financial year.</p> 
7	<p>To access the forms select the current financial year and click on view button:</p> 
8	<p>The following question will display:</p> 
9	<p>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.</p> 

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Step	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 <table><tr><th>#</th><th>Form</th><th>Description</th><th>Due Date</th><th>Select</th></tr><tr><td></td><td></td><td>Planning</td><td></td><td>Select</td></tr><tr><td>1.</td><td>A</td><td>Employment Summary</td><td>30/04/2019</td><td>Select</td></tr><tr><td>2.</td><td>B</td><td>Educational Profile</td><td>30/04/2019</td><td>Select</td></tr><tr><td>3.</td><td>C1</td><td>Planned Beneficiaries of Training Summary</td><td>30/04/2019</td><td>Select</td></tr><tr><td>4.</td><td>C2</td><td>Planned Training- Unemployed</td><td>30/04/2019</td><td>Select</td></tr><tr><td>5.</td><td>C3</td><td>Planned Training- Employed</td><td>30/04/2019</td><td>Select</td></tr><tr><td>6.</td><td>C5</td><td>List of Vacancies that are difficult to fill</td><td>30/04/2019</td><td>Select</td></tr><tr><td></td><td></td><td>Reporting</td><td></td><td>Select</td></tr><tr><td>7.</td><td>D1</td><td>Number of Actual Beneficiaries of Training</td><td>30/04/2019</td><td>Select</td></tr><tr><td>8.</td><td>D2</td><td>Number of Beneficiaries who completed the Training interventions</td><td>30/04/2019</td><td>Select</td></tr><tr><td>9.</td><td>D3</td><td>Total number of beneficiaries who completed AET programmes</td><td>30/04/2019</td><td>Select</td></tr><tr><td>10.</td><td>D4</td><td>Impact Assessment</td><td>30/04/2019</td><td>Select</td></tr><tr><td></td><td></td><td>Planning Pivotal</td><td></td><td>Select</td></tr><tr><td>11.</td><td>E1</td><td>Pivotal plan- Planned beneficiaries of Training Summaries</td><td>30/04/2019</td><td>Select</td></tr><tr><td></td><td></td><td>Reporting Pivotal</td><td></td><td>Select</td></tr><tr><td>12.</td><td>F1</td><td>Pivotal Report Trained Beneficiaries - Summary</td><td>30/04/2019</td><td>Select</td></tr></table>	#	Form	Description	Due Date	Select			Planning		Select	1.	A	Employment Summary	30/04/2019	Select	2.	B	Educational Profile	30/04/2019	Select	3.	C1	Planned Beneficiaries of Training Summary	30/04/2019	Select	4.	C2	Planned Training- Unemployed	30/04/2019	Select	5.	C3	Planned Training- Employed	30/04/2019	Select	6.	C5	List of Vacancies that are difficult to fill	30/04/2019	Select			Reporting		Select	7.	D1	Number of Actual Beneficiaries of Training	30/04/2019	Select	8.	D2	Number of Beneficiaries who completed the Training interventions	30/04/2019	Select	9.	D3	Total number of beneficiaries who completed AET programmes	30/04/2019	Select	10.	D4	Impact Assessment	30/04/2019	Select			Planning Pivotal		Select	11.	E1	Pivotal plan- Planned beneficiaries of Training Summaries	30/04/2019	Select			Reporting Pivotal		Select	12.	F1	Pivotal Report Trained Beneficiaries - Summary	30/04/2019	Select
#	Form	Description	Due Date	Select																																																																																		
		Planning		Select																																																																																		
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		Reporting Pivotal		Select																																																																																		
12.	F1	Pivotal Report Trained Beneficiaries - Summary	30/04/2019	Select																																																																																		

4.2 Planning

4.2.1 Form A – Employment Summary


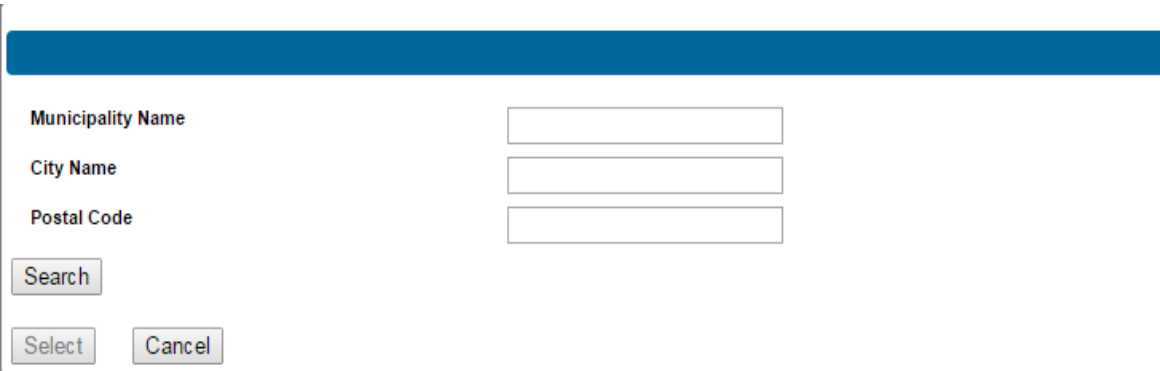
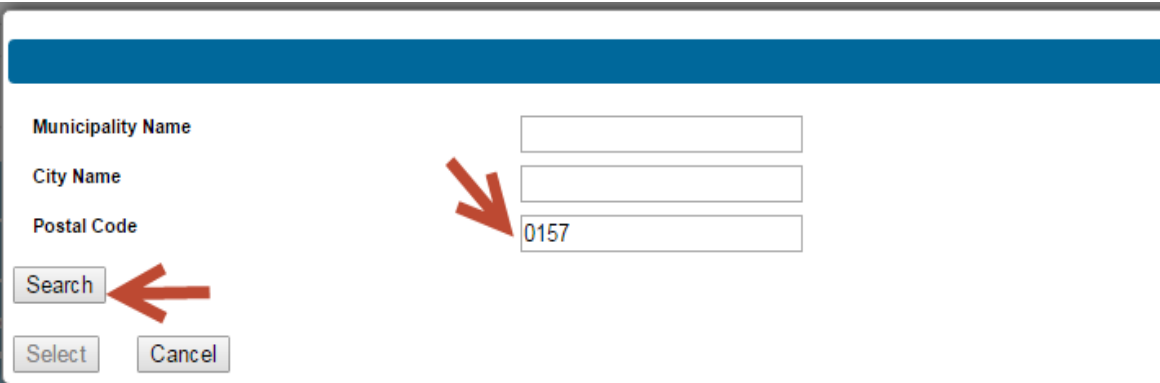
Step	Functionality
1	All fields indicated as a Lookup field, are fields with a lookup with specific values to use. The SDF cannot change these, or use values other than what is in the list of lookup values.
2	The OFO Occupation Code field has a built in search functionality. When you click in this field, a page will open that looks as follows (please see below):

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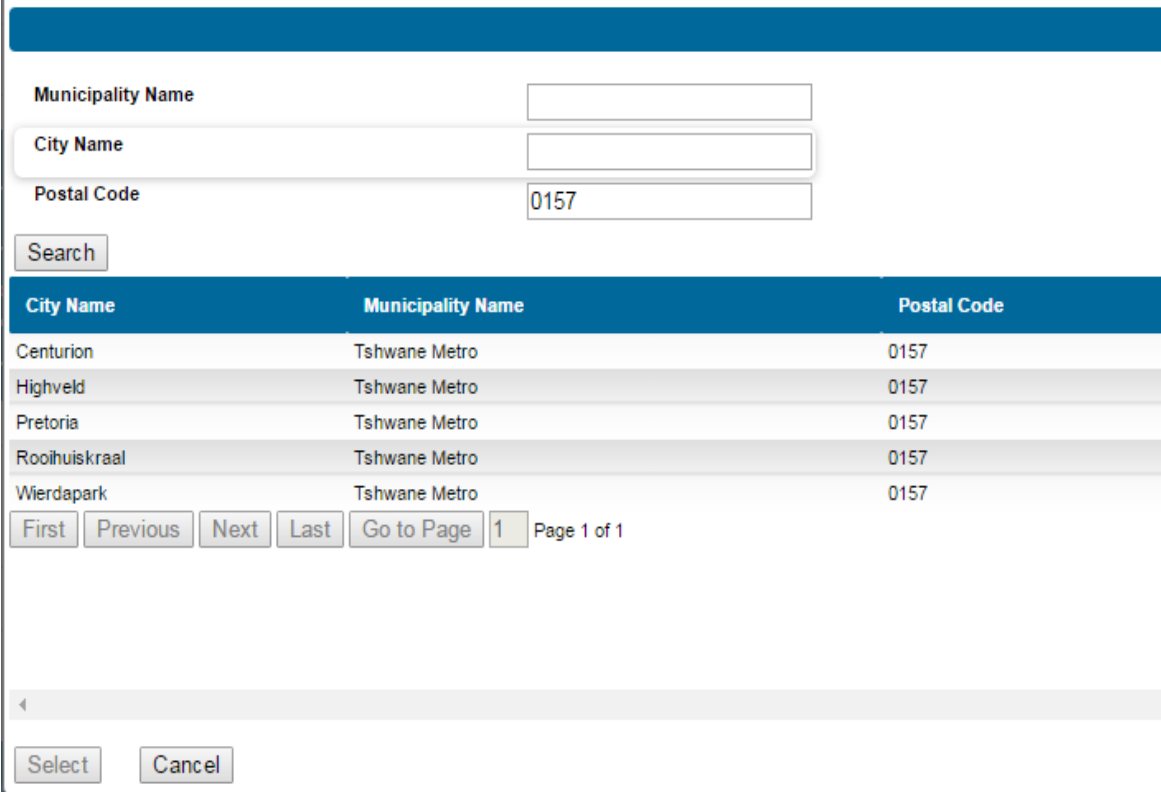
Step	Functionality																																														
	<div> <div> Dashboard Skills </div> <div> <div>Back to MGA Forms</div> <div>Employment Summary</div> <div>SUN INTERNATIONAL - A000000003</div> <div>1 January 2017 - 31 December 2017</div> </div> <div> <div>OFO Occupation</div> <div>Geography</div> </div> <div> <div> If you would like to use the physical address on the Organisation Details page, please tick this box. </div> <table border="1"> <thead> <tr> <th colspan="3">African</th> <th colspan="3">Coloured</th> <th colspan="3">Indian/Asian</th> <th colspan="3">White</th> <th colspan="2">Age Group</th> </tr> <tr> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> <th>M</th><th>F</th><th>D</th> <th>< 35</th><th>35 - 55</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td> <td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td> <td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td> <td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td> <td><input type="text"/></td><td><input type="text"/></td> </tr> </tbody> </table> <div>Add Bulk Import</div> </div> </div> <p>The SDF can search for the occupation by adding search criteria and clicking on the Search button.</p> <div> <div> <div>OFO Code</div> <div>OFO Description</div> <div>Search</div> </div> <div> <table border="1"> <thead> <tr> <th>OFO Code</th> <th>OFO Description</th> </tr> </thead> <tbody> <tr> <td>2015-422102</td> <td>Travel Consultant</td> </tr> </tbody> </table> <div> <div>First</div> <div>Previous</div> <div>Next</div> <div>Last</div> <div>Go to Page</div> <div>1</div> <div>Page 1 of 1</div> </div> </div> <div> <div>Select</div> <div>Cancel</div> </div> </div> <p>The SDF will click anywhere on the line as example below to select the line.</p>	African			Coloured			Indian/Asian			White			Age Group		M	F	D	M	F	D	M	F	D	M	F	D	< 35	35 - 55	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	OFO Code	OFO Description	2015-422102	Travel Consultant
African			Coloured			Indian/Asian			White			Age Group																																			
M	F	D	M	F	D	M	F	D	M	F	D	< 35	35 - 55																																		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																																		
OFO Code	OFO Description																																														
2015-422102	Travel Consultant																																														

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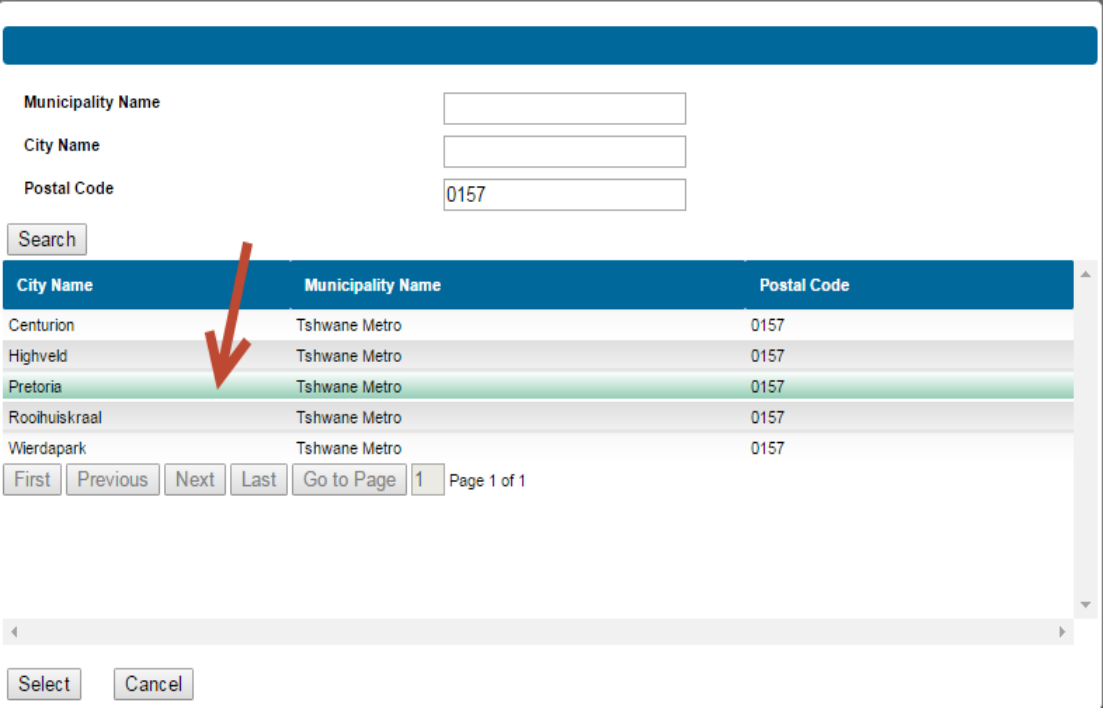
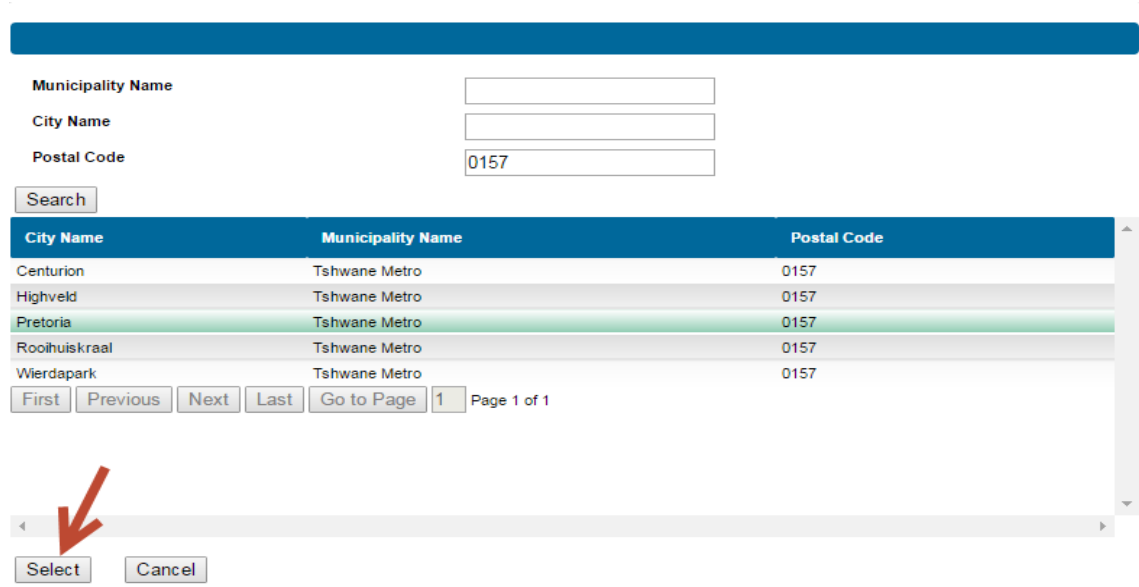

Step	Functionality				
	<div> <div>OFO Code</div> <div>OFO Description</div> <div>Search</div> </div> <table border="1"> <thead> <tr> <th>OFO Code</th> <th>OFO Description</th> </tr> </thead> <tbody> <tr> <td>2015-422102</td> <td>Travel Consultant</td> </tr> </tbody> </table> <div> <div>First</div> <div>Previous</div> <div>Next</div> <div>Last</div> <div>Go to Page</div> <div>1</div> <div>Page 1 of 1</div> </div>	OFO Code	OFO Description	2015-422102	Travel Consultant
OFO Code	OFO Description				
2015-422102	Travel Consultant				
	<div> <div>Select</div> <div>Cancel</div> </div> <p>The selected line will turn Green and then click on the Select button at the bottom of the screen.</p>				
	<div> <div>OFO Code</div> <div>OFO Description</div> <div>Search</div> </div> <table border="1"> <thead> <tr> <th>OFO Code</th> <th>OFO Description</th> </tr> </thead> <tbody> <tr> <td>2015-422102</td> <td>Travel Consultant</td> </tr> </tbody> </table> <div> <div>First</div> <div>Previous</div> <div>Next</div> <div>Last</div> <div>Go to Page</div> <div>1</div> <div>Page 1 of 1</div> </div>	OFO Code	OFO Description	2015-422102	Travel Consultant
OFO Code	OFO Description				
2015-422102	Travel Consultant				
	<div> <div>Select</div> <div>Cancel</div> </div> <p>The selected OFO code and Occupation will display</p>				
	<div> <div>OFO Occupation</div> <div>2015-422102 - Travel Consultant</div> </div>				

Step	Functionality
3	<p>Click on the magnifying class next to Geography</p> 
4	<p>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.</p>
5	<p>The following screen will display:</p> 
6	<p>Type in the municipality Name OR City Name OR Postal Code and click on Search</p> 
7	<p>The system will return all values as per criteria searched</p>

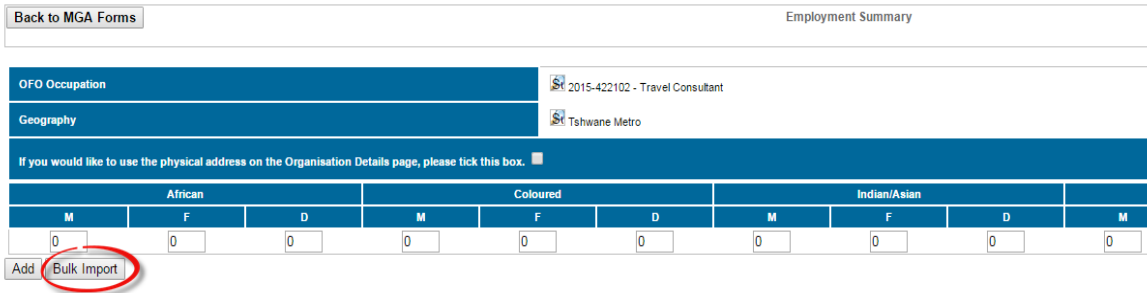

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Step	Functionality
	
8	<p>Select the applicable line by clicking anywhere in the row as screenshot below:</p> <p>The row selected will turn Green</p>

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Step	Functionality
	 <p>Then click on the Select Button</p>  <p>The Geography selection will be added to the section</p> 
9	Male and Females must include disability. Disability must be specified separately: e.g. 3 Male, 2 Female, of which 2 are disabled.

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Step	Functionality
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	<p>If you want to upload data using the excel spreadsheet , click on Bulk import button:</p>  <p>The screenshot shows the 'Employment Summary' form. At the top, there are buttons for 'Back to MGA Forms' and 'Employment Summary'. Below these are fields for 'OFO Occupation' (2015-422102 - Travel Consultant) and 'Geography' (Tshwane Metro). A checkbox for 'If you would like to use the physical address on the Organisation Details page, please tick this box.' is present. Below this is a table with columns for 'African', 'Coloured', and 'Indian/Asian', each with sub-columns for 'M', 'F', and 'D'. The 'Bulk Import' button is circled in red at the bottom left of the form.</p>
13	<p>Download the Excel template and complete all fields</p>  <p>The screenshot shows a dialog box titled 'IMPORT EXCEL DATA'. It contains a link 'Download Excel Template' which is circled in red. Below the link are buttons for 'Choose File' (labeled 'No file chosen') and 'Import' (labeled 'Cancel').</p> <p>The file will be displayed at the bottom left of the screen</p>

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Step

Functionality

IndiciuM
SETA Management System

Dashboard Skills

Back to MGA Forms Employment Summary

OFO Occupation 2015-422102 - Travel Consultant

Geography Tshwane Metro

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

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

Add Bulk Import

Confirm ☐

Save

Edit Remove Remove All

Major Group	OFO Occupation	Geography	African Male	African Female	African Disabled	Coloured Male	Coloured Female	Coloured Disabled	Indian/Asian Male	Indian/Asian Female	Indian/Asian Disabled	White Male	White Female	White Disabled
MANAGERS	2015-111204 - Senior Government Official	Johannesburg Metro	3	0	0	0	0	0	0	2	1	0	0	0
MANAGERS	2015-111101 - Local or Provincial Government Legislator	Abaqulusi	3	0	0	0	0	0	0	0	0	0	0	0
MANAGERS	2015-111101 - Local or Provincial Government Legislator	Tshwane Metro	2	0	0	0	0	0	0	0	0	0	0	0

2017_Employment...xlsx

The Excel Template will display, Click on Enable Editing

2017_Employment_Summary_V1 [Protected View] - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

A4 : 2015-111101 - Local or Provincial Government Legislator

	A	B	C	D	E	F	G	H	I	J
	OFO Occupation	Municipality	African Male	African Female	African Disabled	Coloured Male	Coloured Female	Coloured Disabled	Indian/Asian Male	Indian/Asian Female
2	2015-111101 - Local or Provincial Government Legislator	Bert Luthuli	1	0	0	0	0	0	0	0
4	2015-111205 - Senior Police Officer	Amahlathi	0	1	0	0	0	0	0	1
6	2015-111102 - Member of Parliament / Parliamentarian	Mkhomazi Wilderness Area	0	1	0	0	0	0	0	1

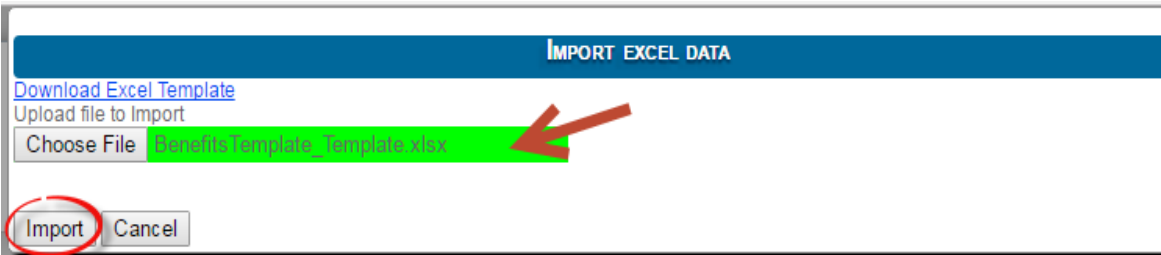

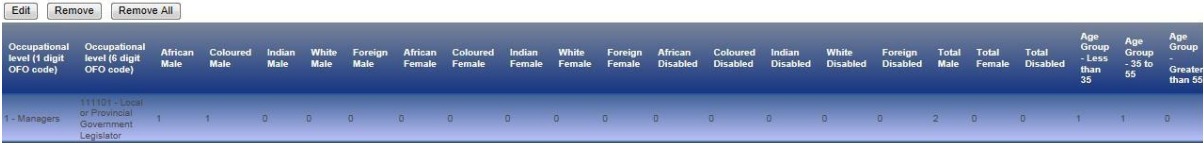
Please ensure data is added to the template without any formulae or links.

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 uploaded using

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Step	Functionality
	<p>the 'Browse' functionality to locate the file.</p> <p>Once the file has been uploaded (it will turn green) click 'Import'.</p>  <p>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.</p>  <p>Each line added is displayed and can be edited by clicking on the line and clicking the 'Edit' button.</p> <p>A line can be removed by clicking on the specific line and clicking on the 'Remove' button.</p> <p>All records in the forms can be removed by clicking on the 'Remove All' button.</p> 
15	<p>The added data will be displayed as the below screenshot:</p>

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Step

Functionality

Dashboard Skills

[Back to MGA Forms](#) Employment Summary SUN INTERNATIONAL - A000000003
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OFO Occupation 2015-422102 - Travel Consultant

Geography Tshwane Metro

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

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](#)

Confirm ☐

[Save](#)

[Edit](#) [Remove](#) [Remove All](#)

Major Group	OFO Occupation	Geography	African Male	African Female	African Disabled	Coloured Male	Coloured Female	Coloured Disabled	Indian/Asian Male	Indian/Asian Female	Indian/Asian Disabled	White Male	White Female	White Disabled	Total Male	Total Female	Total Disabled	Age Group - Less than 35	Age Group - 35 to 55	Age Group - Greater than 55
MANAGERS	2015-111204 - Senior Government Official	Johannesburg Metro	3	0	0	0	0	0	0	2	1	0	0	0	3	2	1	2	3	0
MANAGERS	2015-111101 - Local or Provincial Government Legislator	Abaqulusi	3	0	0	0	0	0	0	0	0	0	0	0	3	0	0	0	3	0
MANAGERS	2015-111101 - Local or Provincial Government Legislator	Tshwane Metro	2	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0	2	0
Sub Total			8	0	0	0	0	0	0	2	1	0	0	0	8	2	1	2	8	0
Grand Total															10			10		

16

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

Dashboard Skills

[Back to MGA Forms](#) Employment Summary SUN INTERNATIONAL - A000000003
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OFO Occupation 2015-422102 - Travel Consultant

Geography Tshwane Metro

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

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](#)

Confirm ☐

[Save](#)

[Edit](#) [Remove](#) [Remove All](#)

Major Group	OFO Occupation	Geography	African Male	African Female	African Disabled	Coloured Male	Coloured Female	Coloured Disabled	Indian/Asian Male	Indian/Asian Female	Indian/Asian Disabled	White Male	White Female	White Disabled	Total Male	Total Female	Total Disabled	Age Group - Less than 35	Age Group - 35 to 55	Age Group - Greater than 55
MANAGERS	2015-111204 - Senior Government Official	Johannesburg Metro	3	0	0	0	0	0	0	2	1	0	0	0	3	2	1	2	3	0
MANAGERS	2015-111101 - Local or Provincial Government Legislator	Abaqulusi	3	0	0	0	0	0	0	0	0	0	0	0	3	0	0	0	3	0
MANAGERS	2015-111101 - Local or Provincial Government Legislator	Tshwane Metro	2	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0	2	0
Sub Total			8	0	0	0	0	0	0	2	1	0	0	0	8	2	1	2	8	0
Grand Total															10			10		

17

Important Notes:

Bulk Imprt is only avaiable 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 Indicum

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Step

Functionality

	A	B	C	D	E	F	G
1	Occupational Code	Specialization / Alternate Title	Employed / Unemployed	Municipality			
2	2015-11101 - Local or Provincial Government Legislator	2015-11101 - Community Board Member	Employed	Abuquias			
3	2015-11102 - Member of Parliament / Parliamentarian	2015-11101 - Councillor	Unemployed	Aberdeen Plain			
4	2015-11101 - Defence Force Senior Officer	2015-11101 - Mayor		Aganang			
5	2015-11101 - General Manager Public Service	2015-11101 - Member of Executive Council (MEC)		Albert Luthuli			
6	2015-11103 - Local Authority Manager	2015-11101 - Member of Mayoral Committee		Amahashi			
7	2015-11104 - Senior Government Official	2015-11101 - Member of The Council of Provinces		Ba-Phalaborwa			
8	2015-11105 - Senior Police Officer	2015-11101 - Premier		Barlana			
9	2015-11106 - Ombudsperson	2015-11101 - Speaker (Local or Provincial Government)		Beaufort West			
10	2015-11107 - Senior Government Manager	2015-11101 - Ward Committee Member		Bela-Bela			
11	2015-11101 - Traditional Leader	2015-11102 - Cabinet Minister		Benedict Orange			
12	2015-111401 - Elected Official	2015-11102 - Chief Whip		Bergvliet			
13	2015-111402 - Trade Union Representative	2015-11102 - Deputy President		Birou			
14	2015-12101 - Director (Enterprise / Organisation)	2015-11102 - Government Minister		Brouberg			
15	2015-12101 - Finance Manager	2015-11102 - Member of Cabinet		Blue Crane Route			
16	2015-12102 - Payroll Manager	2015-11102 - President		Breede River			
17	2015-12103 - Credit Manager	2015-11102 - Speaker (Parliament)		Breede River/Wirrelsands			
18	2015-12104 - Internal Audit Manager	2015-11102 - State Secretary		Breede Valley			
19	2015-12101 - Personnel / Human Resource Manager	2015-11101 - Defence Force Senior Officer		Buffalo City			
20	2015-12102 - Business Training Manager	2015-11102 - Diplomatic Mission Administrator		Bushbuckridge			
21	2015-12103 - Compensation and Benefits Manager	2015-11102 - Labour Inspectorate Manager		Camdeboo			
22	2015-12104 - Recruitment Manager	2015-11103 - City Administrator		Cape Agulhas			
23	2015-12105 - Employee Wellness Manager	2015-11103 - City Treasurer		Cape Town Metro			
24	2015-12106 - Health and Safety Manager	2015-11103 - General Manager Local Authority		Cederberg			
25	2015-12101 - Policy and Planning Manager	2015-11103 - Municipal Manager		Central Karoo			
26	2015-12102 - Corporate General Manager	2015-11103 - Town Clerk		Dannhauser			
27	2015-12102 - Corporate Services Manager	2015-11104 - Administrative Attaché		Delmas			
28	2015-12103 - Physical Asset Manager	2015-11104 - Attaché		Diamondfields			
29	2015-12104 - Contract Manager	2015-11104 - Chief Electoral Officer		Dikhaing			
30	2015-12105 - Programme or Project Manager	2015-11104 - Chief of Staff		Dikgatong			
31	2015-12106 - Franchise Manager	2015-11104 - Chief Operating Officer (Government Department)		Dipaiseng			
32	2015-12107 - Labour Recruitment Manager	2015-11104 - Commissioner		Ditsofotla			
33	2015-12108 - Quality Systems Manager	2015-11104 - Consular Officer		Dr JS Moroka			
34	2015-12109 - Sustainability Manager	2015-11104 - Plenipotentiary		Drakenstein			
35	2015-12101 - Sales and Marketing Manager	2015-11104 - Registrar (Including Legal / Court etc. But Excluding Tertiary Institutions)		eDumbe			
36	2015-12102 - Sales Manager	2015-11104 - Secretary (Government Department)		Ekurhuleni Metro			
37	2015-12103 - Director of Marketing	2015-11104 - Spokesperson		Etundini			
38	2015-12104 - Interactive and Direct Marketing Strategist	2015-11104 - Trade Commissioner Attaché		Enslatheni EC			

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Ensure that the race, age and gender breakdowns correspond

	A	B
2	Occupational Code	Specialization / Alternate Title
4	2015-11101 - Local or Provincial Government Legislator	2015-11101 - Community Board Member
5		
6		
7		
8		

19

Please remove all formulas on the spreadsheet as the system will not upload the data if the spreadsheet contains formula's.

4.2.2 Form B – Educational Profile

Action / Screenshot

Follow steps 1 – 7 in section 7.1

The Educational Profile needs to be completed.

Dashboard Skills

[Back to MGA Forms](#)

Educational Profile

SUN INTERNATIONAL - A000000003
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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 RANK DESCRIPTOR](#)

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Action / Screenshot

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

The screenshot shows a web form titled 'Educational Profile'. At the top left is a button labeled 'Back to MGA Forms'. Below this are three buttons: 'Confirm' (highlighted in blue), 'Save', and 'Edit'. Below the buttons is a table with two columns: 'Description' and 'Number Of Employees'. The table contains the following data:

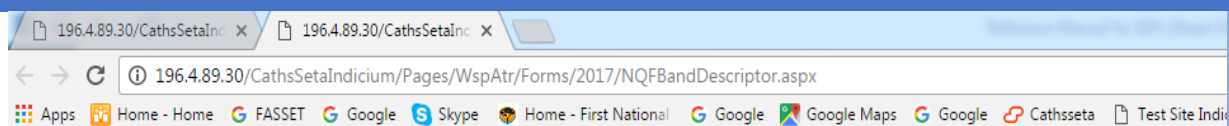
Description	Number Of Employees
AET	0
NQF Level 1,2	0
NQF Level 3,4,5,6	0
NQF Level 7,8,9,10	0
Grand Total	0

Below the table, there is a hyperlink labeled 'NQF BAND DESCRIPTOR' which is circled in red.

The following template will display.

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Action / Screenshot



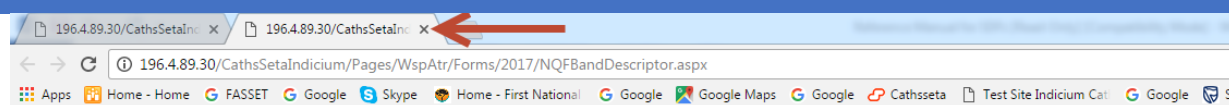
NQF BAND DESCRIPTOR

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 tertiary level – includes workplace learning -		
2		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.

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Action / Screenshot



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 tertiary level – includes workplace learning -		
2		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)		

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

Home

[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](#)

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

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Action / Screenshot

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AET

Number Of Employees 0

Update Cancel

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](#)

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

Back to MGA Forms Educational Profile SUN INTERNATIONAL - A000000003 1 January 2017 - 31 December 2017

AET

Number Of Employees 0

Update Cancel

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](#)

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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Action / Screenshot

Follow steps 1 – 7 in section 7.1

The Planned Training Unemployed needs to be completed.

Back to MGA Forms Planned Training- Unemployed TEST ORG - L090909090
1 January 2019 - 31 December 2019

Planned Training- Unemployed

OFO Occupation

Municipality

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

Type Of Learning Programme

Number to be Trained at:

Entry Level

Intermediate Level

Advanced Level

African			Coloured			Indian/Asian			White			Age Group		
M	F	D	M	F	D	M	F	D	M	F	D	< 35	35 - 65	> 65
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Add

Once data has been captured it will display as follows:

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 Area	Type 3	3	9	3	0	3	0	0	0	0

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

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Action / Screenshot

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
MANAGERS	2015-111101 - Local or Provincial Government Legislator	Johannesburg Metro	test	1	1	0	1	0	0	0	0
MANAGERS	2015-111101 - Local or Provincial Government Legislator	Albert Luthuli	Type 1	12	3	12	3	0	0	9	0
MANAGERS	2015-111102 - Member of Parliament / Parliamentarian	Amahlathi	Type 2	3	8	3	0	3	0	0	0
MANAGERS	2015-111102 - Member of Parliament / Parliamentarian	Mkhomazi Wilderness Area	Type 3	3	9	3	0	3	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
MANAGERS	2015-111301 - Traditional Leader	Johannesburg Metro	test	2	24	0	24	0	10	0	0
MANAGERS	2015-111101 - Local or Provincial Government Legislator	Johannesburg Metro	test	1	1	0	1	0	0	0	0
MANAGERS	2015-111101 - Local or Provincial Government Legislator	Albert Luthuli	Type 1	12	3	12	3	0	0	9	0
MANAGERS	2015-111102 - Member of Parliament / Parliamentarian	Amahlathi	Type 2	3	8	3	0	3	0	0	0
MANAGERS	2015-111102 - Member of Parliament / Parliamentarian	Mkhomazi Wilderness	Type 3	3	9	3	0	3	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.

Back to MGA Forms Planned Training- Employed TEST ORG - L090909090
1 January 2019 - 31 December 2019

Planned Training- Employed

OFO Occupation

Municipality

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

Type Of Learning Programme

Number to be Trained at:

Entry Level

Intermediate Level

Advanced Level

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

Edit Remove Remove All

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 from the dropdown.
Then Click on the Save button

Please select from the dropdown if your company does not conduct AET training.

Yes ▼

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

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Action / Screenshot

Click on relevant AET level to edit & complete the info

Please select from the dropdown if your company does not conduct AET training.

Yes ▼

Save

Edit

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
Grand Total		0	0	0	0	0	0	0	0	0	0	0	0

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.

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

Comments

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 system rejecting your submission.

Nothing to Report ☐

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

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Action / Screenshot

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 system rejecting your submission.

Nothing to Report ☒

Save

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

Skills Gaps:

Refers to lack of specific competencies by employees to undertake job tasks successfully to required industry standards. Skills Gaps may arise due to lack of training, new job tasks, technological changes, or new production processes to list a few. Skills Gaps are also referred to as "top-up-skills".

Please note that identified skills gaps will assist CATHSSETA in planning for training interventions to be supported.

Major Occupation	No	List the Top 3 Most common Skills Gap
Managers	1	1
	2	0
	3	0
Professionals	1	0
	2	0
	3	0
Technicians and Associate Professionals	1	0
	2	0
	3	0
Clerical Support Worker	1	0
	2	0
	3	0
Service and Sales Workers	1	0
	2	0
	3	0
Skilled Agricultural, Forestry, Fishery, Craft and Related Trades Workers	1	0
	2	0
	3	0
	1	0

Please ensure that all the fields are captured and cannot be left blank.

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.

Document:	SDF Training Manual	
Client:	CATHSSETA	
Date:	February 2019	Page 61

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

Back to MGA Forms	Number of Actual Beneficiaries of Training	TEST ORG - L090909090 1 January 2018 - 31 December 2018
-----------------------------------	--	--

Number of Beneficiaries per Population Group															
OFO Occupation															
Geography															
If you would like to use the physical address on the entity details page, please tick this box <input type="checkbox"/>															
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](#)

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 system rejecting your submission. This forms is for previous financial year – 01 January 2018 to 31 December 2018.

[Edit](#) [Remove](#) [Remove All](#)

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

The below form needs to be completed:

Dashboard	ETQA	DG	Skills	Reports	Maintenance	Help Desk	ORAM
---------------------------	----------------------	--------------------	------------------------	-------------------------	-----------------------------	---------------------------	----------------------

Back to MGA Forms	Number of Beneficiaries who completed the Training interventions	TEST ORG - L090909090 1 January 2018 - 31 December 2018
-----------------------------------	--	--

Number of Beneficiaries who completed the Training interventions															
OFO Occupation															
Educational Institution															
Course Completed															
Number to be Trained at:															
Entry Level															
Intermediate Level															
Advanced Level															
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](#)

Document:	SDF Training Manual	
Client:	CATHSSETA	
Date:	February 2019	Page 62

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

The below question needs to be completed:

Please tick the checkbox if your company does not conduct AET training:

☐

Save

The below form needs to be completed:

Dashboard

ETQA

DG

Skills

Reports

Maintenance

Help Desk

ORAM

Back to MGA Forms

Total number of beneficiaries who completed AET programmes

TEST ORG - L090909090
1 January 2018 - 31 December 2018

Click on relevant AET level to edit & complete the info

Please tick the checkbox if your company does not conduct AET training:

☒

Save

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
Grand Total		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:

Back to MGA Forms

Impact Assessment

TEST ORG - L090909090
1 January 2018 - 31 December 2018

Impact Assessment

Is what you have reported in line with you have planned the year before?

Save Cancel

Document:	SDF Training Manual	
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Date:	February 2019	Page 63

If Yes is selected Click on the Save button

[Dashboard](#) [Skills](#)

[Back to MGA Forms](#) Impact Assessment SUN INTERNATIONAL - A000000003
1 January 2016 - 31 December 2016

Impact Assessment

Does what you have reported is in line with what you've planned the year before? Yes ▼

Save Cancel

If No is selected complete the below information:

Impact Assessment

Does what you have reported is in line with what you've planned the year before? No ▼

Budget Constraints

Cashflow

Operation Requirements

Provider Availability Or Inadequacy

Restructuring

Occupational Description

MANAGERS

Type Of Learning Programme

Training Level Entry Level ▼

Number

PROFESSIONALS

Type Of Learning Programme

Training Level Entry Level ▼

Number


TECHNICIANS AND ASSOCIATE PROFESSIONALS

Type Of Learning Programme

Then click on Save to Save the information

Document:	SDF Training Manual		
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PLANT AND MACHINE OPERATORS AND ASSEMBLERS	
Type Of Learning Programme	t
Training Level	Entry Level ▼
Number	0
ELEMENTARY OCCUPATIONS	
Type Of Learning Programme	t
Training Level	Entry Level ▼
Number	0



6 Planning Pivotal

6.1 Form E1 – Summary of Form E2 and E3

6.2 Form E2 – Pivotal Plan – Planned Training – Unemployed

The below form needs to be completed:

Document:	SDF Training Manual		
Client:	CATHSSETA		
Date:	February 2019		Page 65

Pivotal Plan – Planned Training - Unemployed

OFO Occupation



Geography


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.

Document:	SDF Training Manual		
Client:	CATHSSETA		
Date:	February 2019		Page 66

Pivotal Plan – Planned Training - Unemployed

OFO Occupation 

Geography 

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**

M	F	D	M	F
0	0	0	0	0

Add **Bulk Import**

March, 2017

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today: March 23, 2017

6.3 Form E3 – Pivotal Plan – Planned training – Employed

The below form needs to be completed:

Document:	SDF Training Manual	
Client:	CATHSSETA	
Date:	February 2019	Page 67

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



Geography


 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
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

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

Document:	SDF Training Manual		
Client:	CATHSSETA		
Date:	February 2019		Page 68

Pivotal Plan – Planned Training - Unemployed

OFO Occupation 

Geography 

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**

M	F	D	M	F
0	0	0	0	0

Add **Bulk Import**

March, 2017

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today: March 23, 2017

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:

Document:	SDF Training Manual		
Client:	CATHSSETA		
Date:	February 2019		Page 69

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



Geography



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:

Document:	SDF Training Manual		
Client:	CATHSSETA		
Date:	February 2019		Page 70

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PIVOTAL Report – Number Trained – Employed

SUN INTERNATIONAL - A000000003

1 January 2016 - 31 December 2016

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



Geography

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
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Add](#) [Bulk Import](#)

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.

[Back to MGA Forms](#)

PIVOTAL Report – Impact Assessment

SUN INTERNATIONAL - A000000003

1 January 2016 - 31 December 2016

Impact Assessment

Does what you have reported is in line with what you've planned the year before?

[Save](#)[Cancel](#)

The Record has been saved successfully

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

Document:	SDF Training Manual		
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Date:	February 2019		Page 71

Impact Assessment	
Does what you have reported is in line with what you've planned the year before? No ▼	
Budget Constraints	<input type="text"/> *Required
Cashflow	<input type="text"/> *Required
Operation Requirements	<input type="text"/> *Required
Provider Availability Or Inadequacy	<input type="text"/> *Required
Restructuring	<input type="text"/> *Required
Occupational Description	
MANAGERS	
Type Of Learning Programme	<input type="text"/> *Required
Training Level	<input type="text"/> ▼ *Required
Number	<input type="text"/> *Required
PROFESSIONALS	
Type Of Learning Programme	<input type="text"/> *Required
Training Level	<input type="text"/> ▼ *Required
Number	<input type="text"/> *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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Date:	February 2019	Page 72

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General Comments

SUN INTERNATIONAL - A000000003

1 January 2017 - 31 December 2017

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 SUF

[Log out](#)

[Switch Profile](#)



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


Document:	SDF Training Manual	
Client:	CATHSSETA	
Date:	February 2019	Page 73

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:

Indicium
SETA Management System

Welcome, Adele - Primary SDF
[Log out](#)
[Switch Profile](#)



Home

Main Page

Mandatory Grant Application Forms
01 January 2017 - 31 December 2017

SUN INTERNATIONAL - A000000003

Update First Time Submission Status

Unable to submit. Section D3: Total number of beneficiaries who completed AET programmes is compulsory. [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

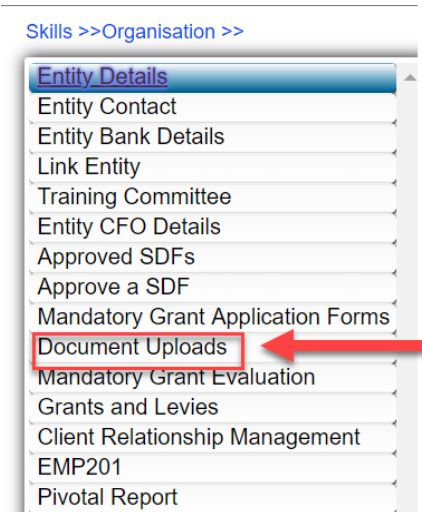
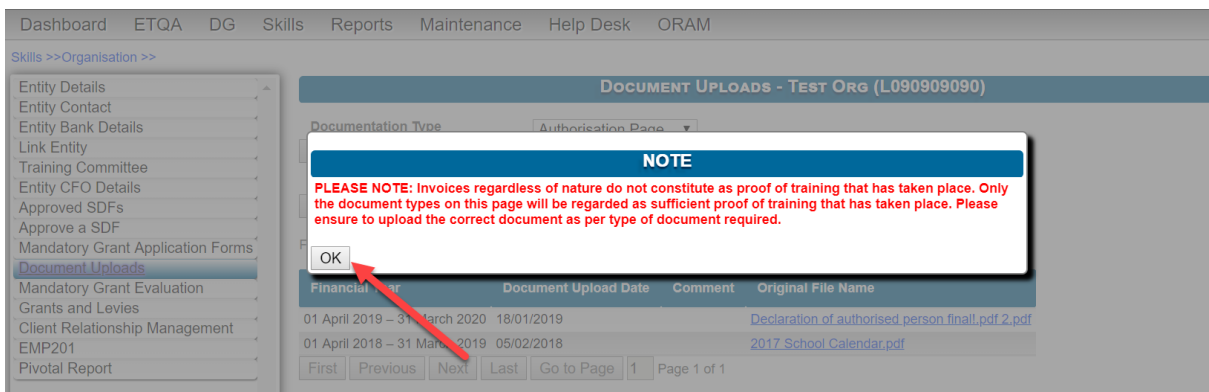
Go to the Form specified in the message and complete the form.

Remember to click on the Save button on each form.

Document:	SDF Training Manual		
Client:	CATHSSETA		
Date:	February 2019		Page 74

10 Uploading of Documents

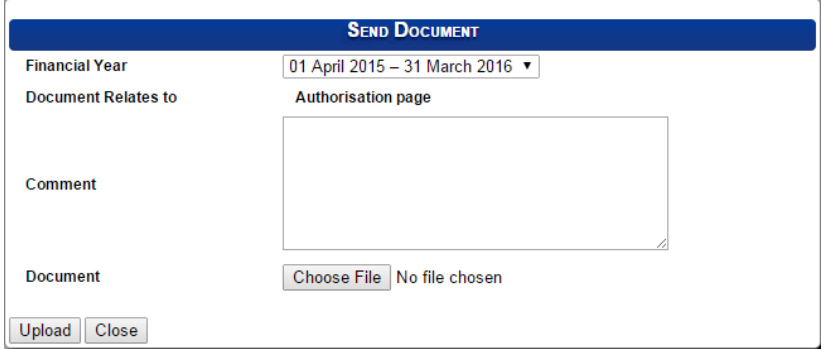
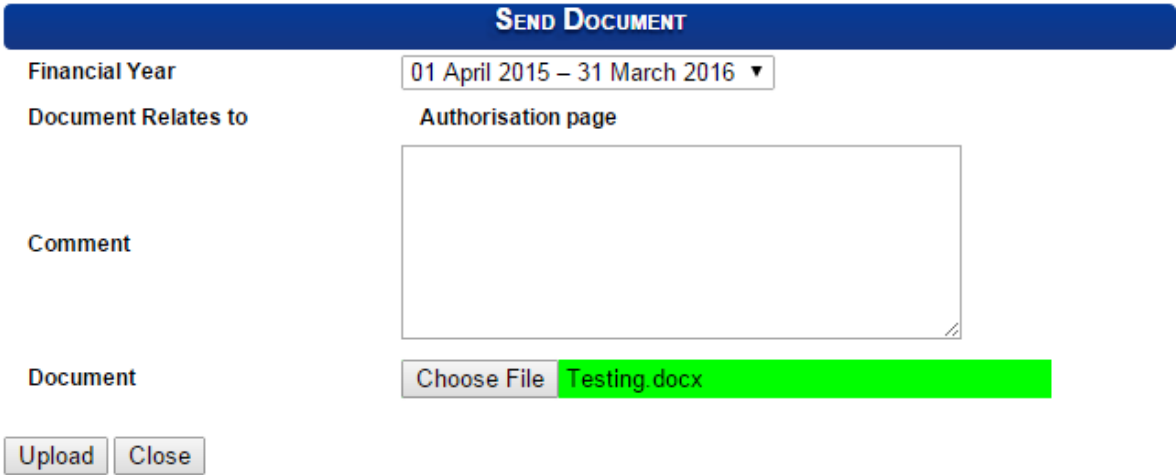
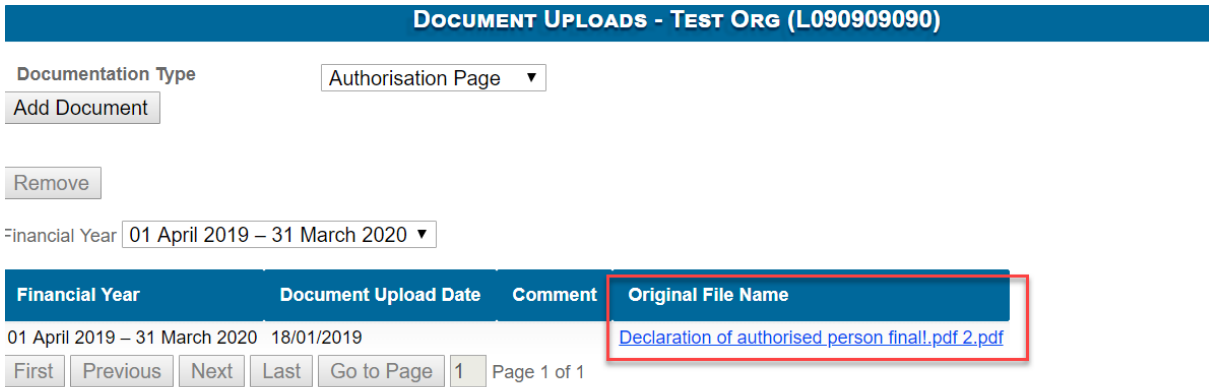
The summary report with the signatures authorising the submission must be uploaded by following the next steps:

Step	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	<p>To upload documents click on the Document Uploads section.</p> 
3	<p>The SDF must select the type of document to upload from the Documentation Type lookup field.</p> <p>The below note will display</p>  <p>Please click on the OK Button after reading the message.</p> <p>Please select the type of document to Upload</p>

Document:	SDF Training Manual	
Client:	CATHSSETA	
Date:	February 2019	Page 75

Step	Action / Screenshot												
	<div><div>DashboardETQADGSkillsReportsMaintenanceHelp DeskORAM</div><div>Skills >> Organisation >></div><div><div><div>Entity Details</div><div>Entity Contact</div><div>Entity Bank Details</div><div>Link Entity</div><div>Training Committee</div><div>Entity CFO Details</div><div>Approved SDFs</div><div>Approve a SDF</div><div>Mandatory Grant Application Forms</div><div>Document Uploads</div><div>Mandatory Grant Evaluation</div><div>Grants and Levies</div><div>Client Relationship Management</div><div>EMP201</div><div>Pivotal Report</div></div><div><div>DOCUMENT UPLOADS - TEST ORG (L090909090)</div><div><div>Documentation Type</div><div>Add Document</div><div>Remove</div><div>Financial Year</div></div><div><div>Authorisation Page</div><div>Authorisation Page</div><div>Certificates</div><div>Attendance Register</div><div>Statement of Results</div></div><div><table><thead><tr><th>Financial Year</th><th>Document Upload Date</th><th>Comment</th><th>Original File Name</th></tr></thead><tbody><tr><td>01 April 2019 – 31 March 2020</td><td>18/01/2019</td><td></td><td>Declaration of authorised person final.pdf 2.pdf</td></tr><tr><td>01 April 2018 – 31 March 2019</td><td>05/02/2018</td><td></td><td>2017 School Calendar.pdf</td></tr></tbody></table><div><div>First</div><div>Previous</div><div>Next</div><div>Last</div><div>Go to Page</div><div>1</div><div>Page 1 of 1</div></div></div></div></div><p>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.</p><p>Please also ensure that you select the current Financial year</p><div><div>DOCUMENT UPLOADS - TEST ORG (L090909090)</div><div><div>Documentation Type</div><div>Add Document</div><div>Remove</div><div>Financial Year</div></div><div><div>Certificates</div></div><div><div>01 April 2019 – 31 March 2020</div></div></div><div><div>4</div><div><p>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.</p><div><div>DOCUMENT UPLOADS - AMPLATS MANAGEMENT SERVICES (L350733343)</div><div><div>Documentation Type</div><div>New Document</div><div>Remove</div></div></div></div><div><div>5</div><div><p>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.</p></div></div></div></div>	Financial Year	Document Upload Date	Comment	Original File Name	01 April 2019 – 31 March 2020	18/01/2019		Declaration of authorised person final.pdf 2.pdf	01 April 2018 – 31 March 2019	05/02/2018		2017 School Calendar.pdf
Financial Year	Document Upload Date	Comment	Original File Name										
01 April 2019 – 31 March 2020	18/01/2019		Declaration of authorised person final.pdf 2.pdf										
01 April 2018 – 31 March 2019	05/02/2018		2017 School Calendar.pdf										

Document:	SDF Training Manual		
Client:	CATHSSETA		
Date:	February 2019		Page 76

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

Document:	SDF Training Manual	
Client:	CATHSSETA	
Date:	February 2019	Page 77

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.

Good luck with the Submission for 2019_2020

For any enquiries please feel free to call CATHSSETA

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