



**CATHSSETA INTEGRATED  
MANAGEMENT SYSTEM  
(CIMS)**

UPDATING BANKING DETAILS  
USER TRAINING MANUAL

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# 1. INTRODUCCION



## 1.1 Overview of the Integrated Management System

The CATHSSETA is a public entity established in terms of the Skills Development Act 97 of 1998. CATHSSETA aims to promote economic and employment growth, social and economic development, redress inequalities in education and training and to facilitate and advance employment equity in the Culture, Arts, Tourism, Hospitality and Sports sectors.

CATHSSETA has developed the CATHSSETA Integrated Management System – **CIMS**. CIMS is based on the business processes and is designed to enable the CATHSSETA to implement the National Skills Development Plan 2030 more effectively.

CIMS has the following core functional modules:

1. **Skills:** The Skills Module gathers information and data from employers/entities about the organisation, workplace skills planning and the implementation of training. This information and data is used to process mandatory or discretionary grant applications, in line with CATHSSETA's Grants Policy. In addition, some of the data collected from employers is used in CATHSSETA's sector skills planning and research activities as well as for monitoring and evaluation.
2. **Finance:** The Finance Module focuses on mandatory grant payment, and discretionary grant disbursement in line with grants regulations that govern the payment and utilisation of levies and the CATHSSETA Grants Policy.
3. **ETQA:** The ETQA Module focuses on managing skills programme registration, qualification development, learnership registration, learning programme material management, workplace approval and mentor registration, skills development provider accreditation management, assessor and moderator registration and management, management of industry funded learners, provider monitoring, learner certification, and learner management.
4. **Projects:** The Projects Module supports the management of the CATHSSETA's funded projects.
5. **Reporting:** CIMS reporting functionality supports CATHSSETA's to decision-making as well as reporting to the DHET

## 1.2 Purpose of this User Manual

This document provides a guide on how to update banking details.

## 1.3 System Requirements

CIMS can be accessed using any browser and requires good Internet connectivity.

## 2. UPDATING BANKING DETAILS



1. Once your company has been approved on CIMS, log into your SDF profile to add/ update company banking details.

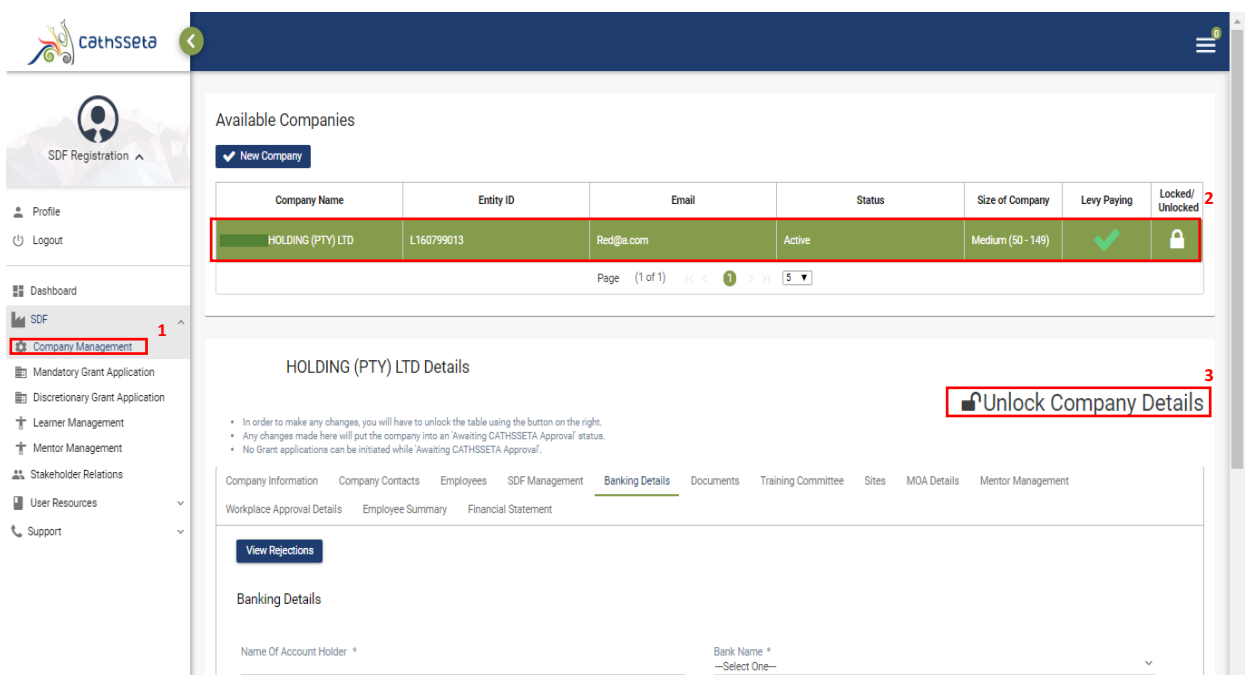


2. Once Logged in will perform the following :

Step 1: Navigate to and click on company management on the left-hand pane

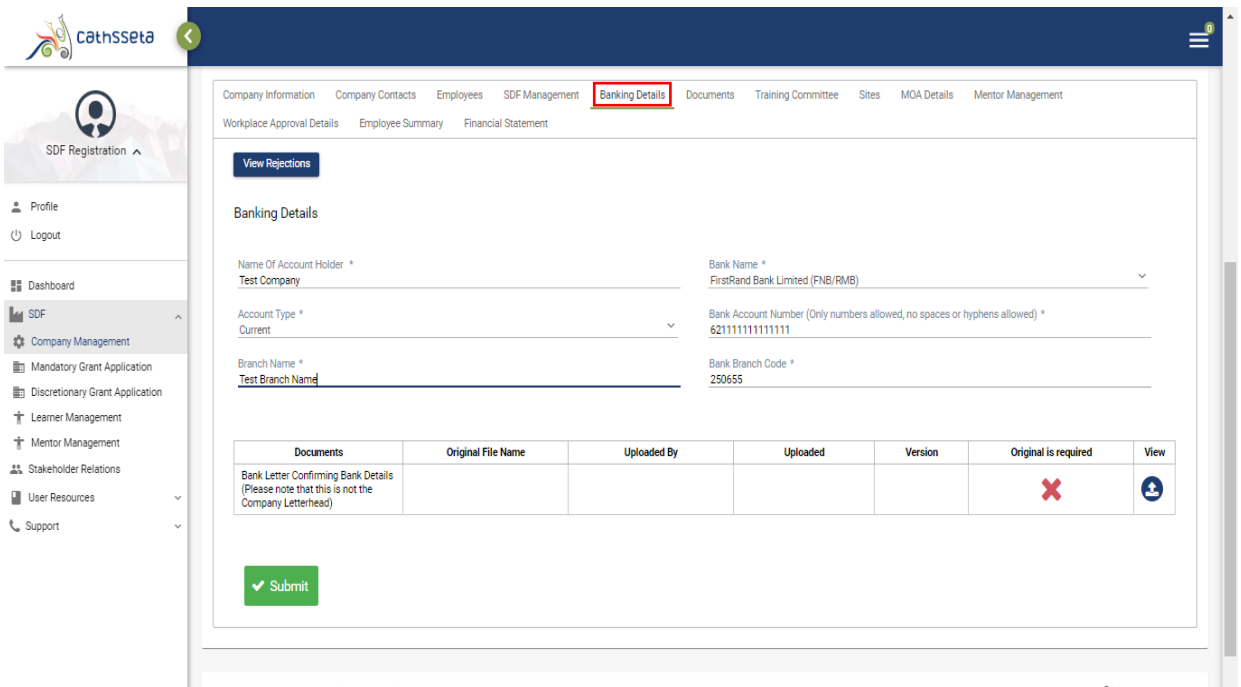
Step 2: Click to select the company you wish to add/ update banking details. The selected company will be highlighted in green.

Step 3: If company details are locked, click to unlock company details, so that you can make changes.



## 2. UPDATING BANKING DETAILS

3. Navigate to the banking details tab to add banking details.
4. You will notice that once you have selected the Bank Name, the Bank Branch Code is auto-populated.



Company Information Company Contacts Employees SDF Management **Banking Details** Documents Training Committee Sites MOA Details Mentor Management

Workplace Approval Details Employee Summary Financial Statement

**View Rejections**

**Banking Details**

Name Of Account Holder \*  
Test Company

Bank Name \*  
FirstRand Bank Limited (FNB/RMB)

Account Type \*  
Current

Bank Account Number (Only numbers allowed, no spaces or hyphens allowed) \*  
6211111111111111

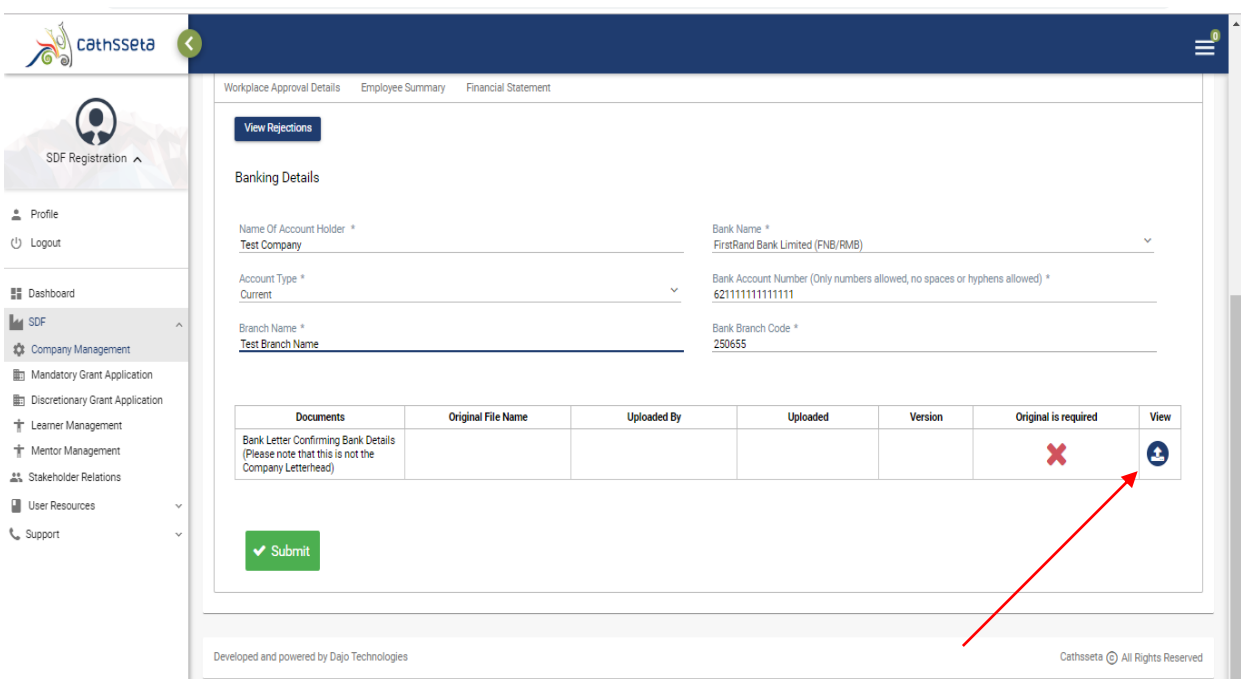
Branch Name \*  
Test Branch Name

Bank Branch Code \*  
250655

Documents	Original File Name	Uploaded By	Uploaded	Version	Original is required	View
Bank Letter Confirming Bank Details (Please note that this is not the Company Letterhead)					✗	📄

**Submit**

5. You will also be required to upload a Bank Letter Confirming Bank Details. To upload click the upload icon.



Workplace Approval Details Employee Summary Financial Statement

**View Rejections**

**Banking Details**

Name Of Account Holder \*  
Test Company

Bank Name \*  
FirstRand Bank Limited (FNB/RMB)

Account Type \*  
Current

Bank Account Number (Only numbers allowed, no spaces or hyphens allowed) \*  
6211111111111111

Branch Name \*  
Test Branch Name

Bank Branch Code \*  
250655

Documents	Original File Name	Uploaded By	Uploaded	Version	Original is required	View
Bank Letter Confirming Bank Details (Please note that this is not the Company Letterhead)					✗	📄

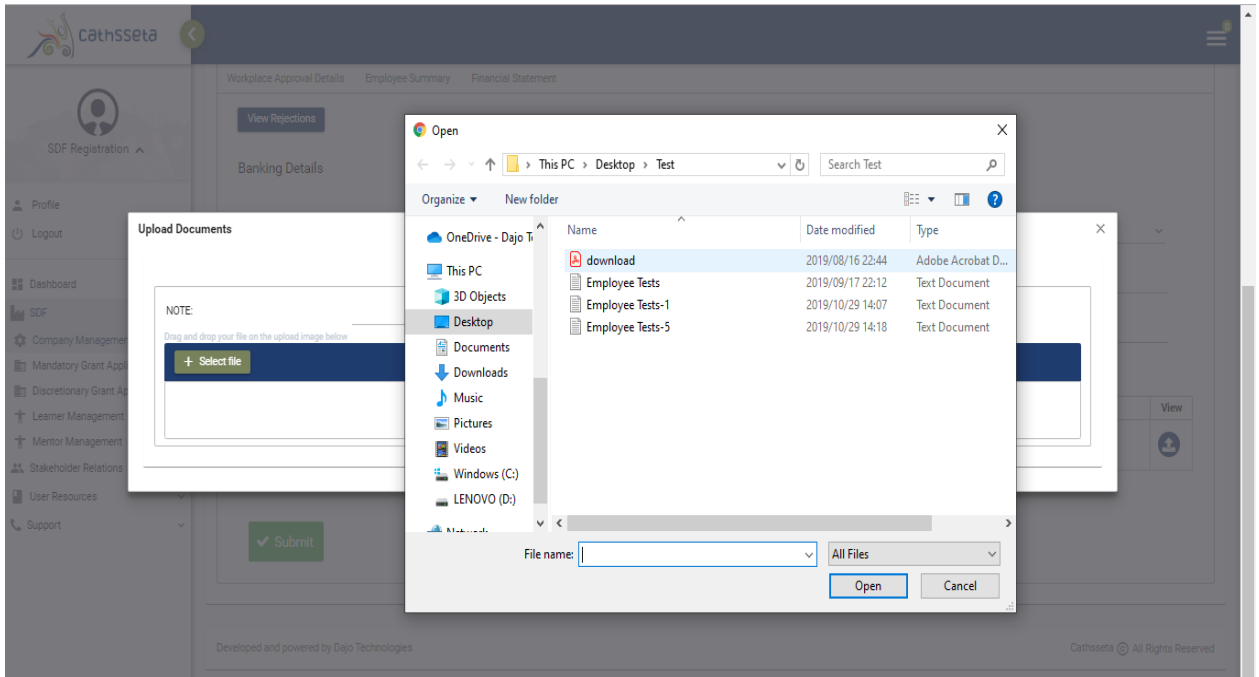
**Submit**

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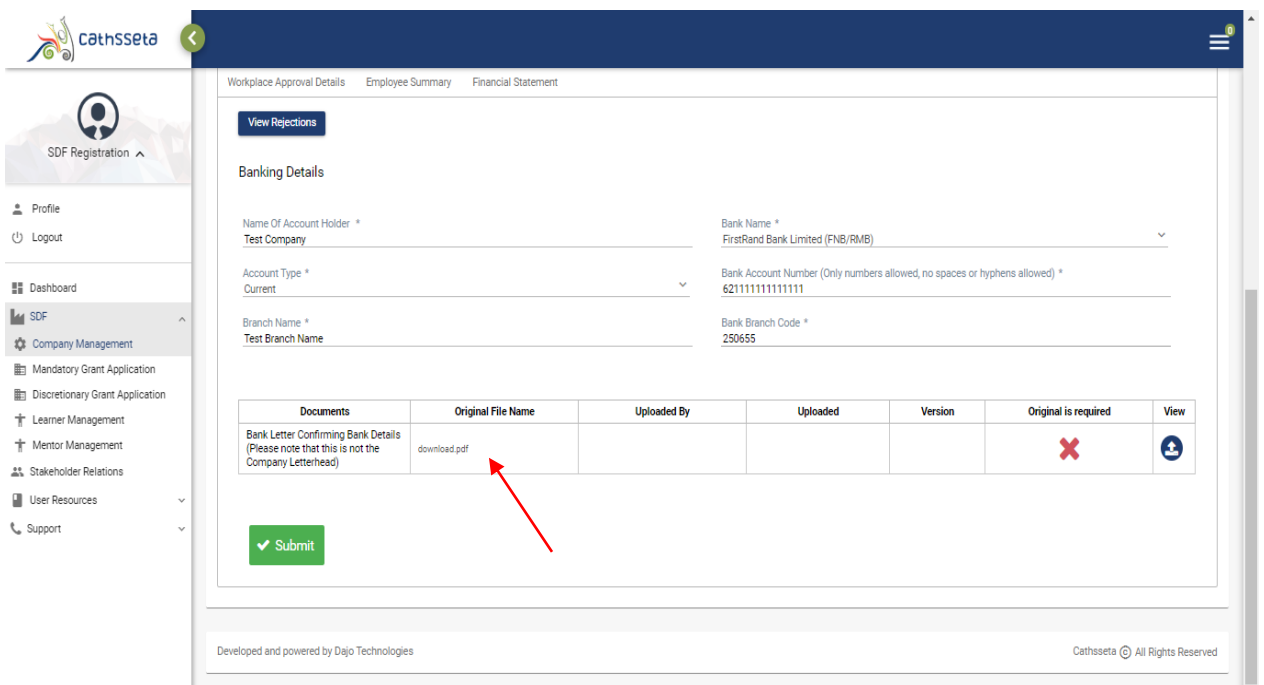
Cathsseta © All Rights Reserved

## 2. UPDATING BANKING DETAILS

7. Click select, to select the file to upload.



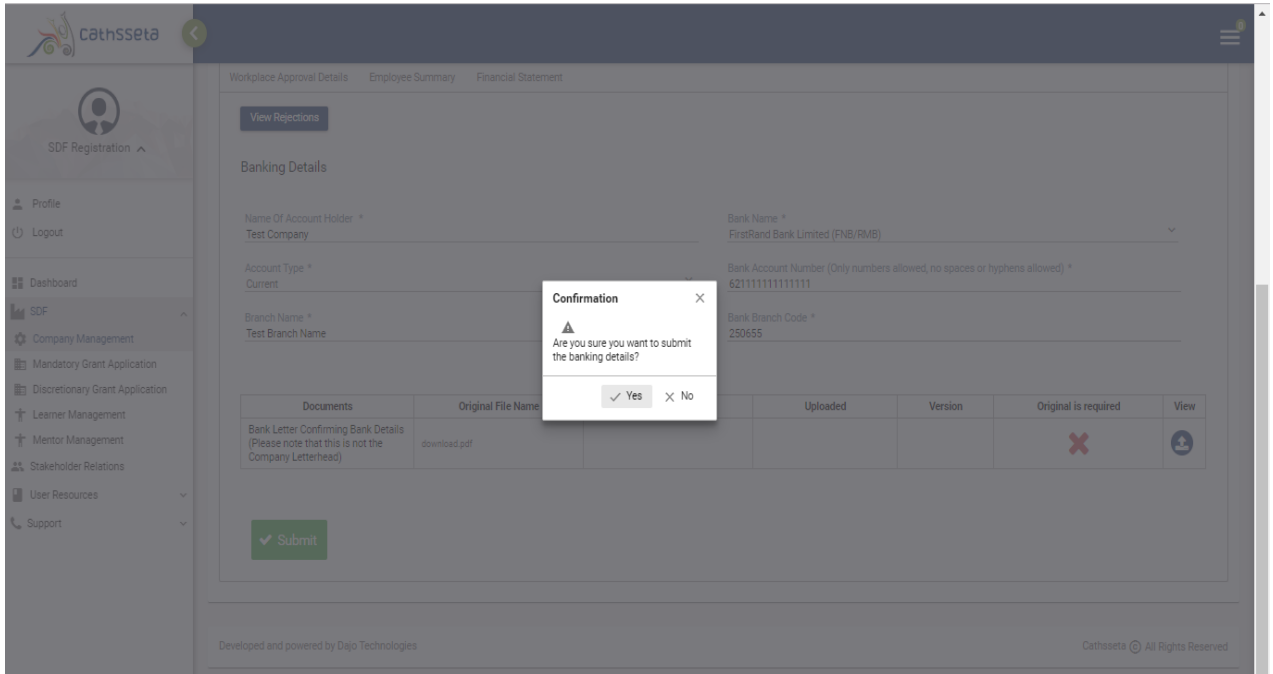
8. Once the file bank letter has been uploaded, the details will be displayed.



9. Click Submit, once all the required information has been captured.

## 2. UPDATING BANKING DETAILS

10. A confirmation will be displayed, click yes to continue.



The screenshot shows the 'Banking Details' form in the SDF Registration system. A 'Confirmation' dialog box is overlaid on the form, asking 'Are you sure you want to submit the banking details?' with 'Yes' and 'No' buttons. The form fields include:

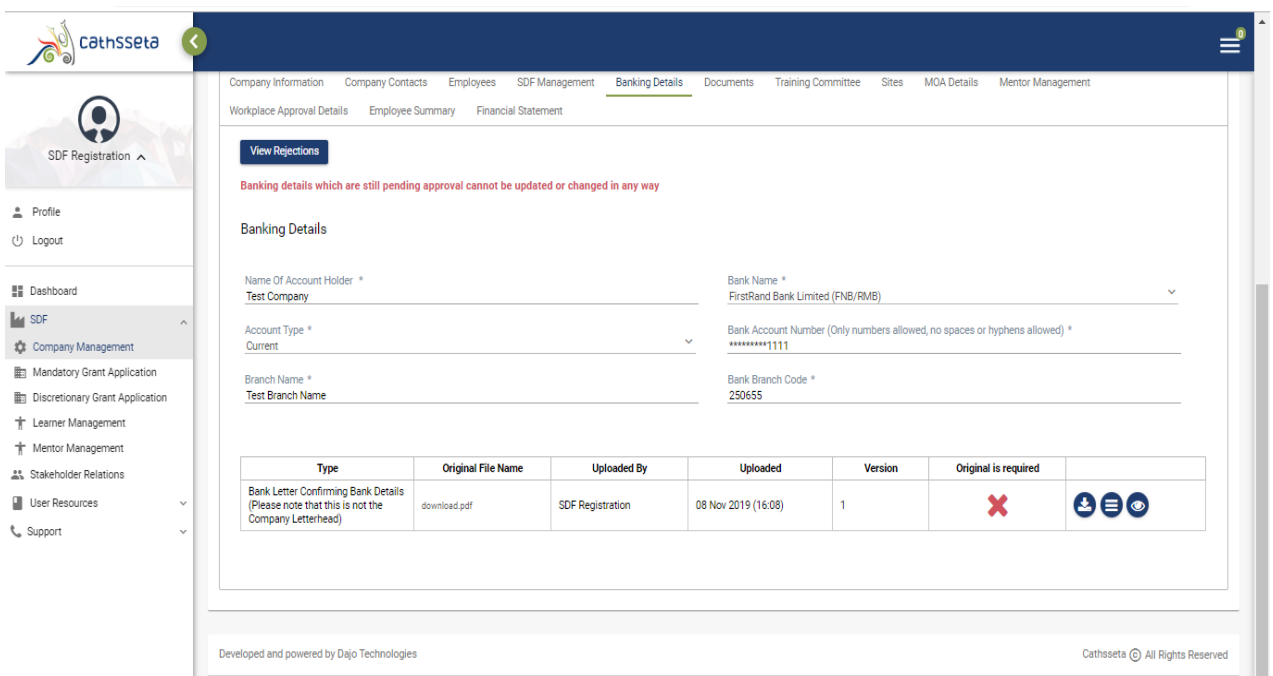
- Name Of Account Holder: Test Company
- Bank Name: FirstRand Bank Limited (FNB/RMB)
- Account Type: Current
- Bank Account Number: 6211111111111111
- Branch Name: Test Branch Name
- Bank Branch Code: 250655

Below the form is a table of documents:

Documents	Original File Name	Uploaded	Version	Original is required	View
Bank Letter Confirming Bank Details (Please note that this is not the Company Letterhead)	download.pdf			✗	📄

A green 'Submit' button is visible at the bottom of the form.

11. Once, submitted the bank details cannot be updated/ changed. Until they are approved/ rejected and sent back to the SDF



The screenshot shows the 'Banking Details' form after submission. A red warning message is displayed: 'Banking details which are still pending approval cannot be updated or changed in any way'. The form fields are the same as in the previous screenshot. The document table now shows the document as uploaded:

Type	Original File Name	Uploaded By	Uploaded	Version	Original is required	View
Bank Letter Confirming Bank Details (Please note that this is not the Company Letterhead)	download.pdf	SDF Registration	08 Nov 2019 (16:08)	1	✗	📄 🗑️ 👁️

The 'Submit' button is no longer visible, and the form is disabled.

### 3. APPROVING BANKING DETAILS BY THE COMPANY CONTACT



12. The company contact will receive an email, indicating that the banking details have been updated and require approval.



13. The company contact will login to their profile and see an outstanding task. Click the arrow to view and edit the task.

The screenshot shows the CATHSSETA dashboard for user Sally Ally. The 'Outstanding Tasks' section contains a table with the following data:

Process Name	Description	Last Action User	Status	Due Date	RAG	View / Edit
Declaration of intent non-CATHSSETA	A Declaration of Intent for TRAVEL AGENCIES PTY (L93 [redacted]) has been submitted by Sally Ally(9101040596089, sbonisile12@gmail.com). Please review the application.	Sally Ally	Underway	28 Oct 2019	Red	View / Edit
Banking Details Management	Banking details for [redacted] CATERING SERVICES CC (L64 [redacted]) have been uploaded/changed and require approval.		Not Started	31 Oct 2019	Red	View / Edit
Declaration of intent non-CATHSSETA	A Declaration of Intent for TRAVEL AGENCIES PTY (L5 [redacted] 5) has been submitted by Sally Ally(9101040596089, sbonisile12@gmail.com). Please review the application.	Sally Ally	Underway	06 Nov 2019	Red	View / Edit
Workplace Approval	A workplace approval application for Qualification: General Education and Training Certificate: Adult Basic Education and Training: Travel and Tourism has been submitted by FLYWELL TRAVEL AGENCIES PTY (L930707395). Please go to Outstanding Tasks on the Dashboard to complete the application.	Sally Ally	Underway	11 Nov 2019	Green	View / Edit
Banking Details Management	Banking details for [redacted] 1 HOLDING (PTY) LTD (L1 [redacted] 3) have been uploaded/changed and require approval.		Not Started	12 Nov 2019	Red	View Task Detail

The 'Assessor/Moderator Application' section contains a table with the following data:

Type Of Application	Application Date	Status	Registration Number	Start Date	End Date	Review Committee Date	Decision Number	View / Edit
Assessor Registration	23 September 2019	Pending Approval	N/A	N/A	N/A	N/A	N/A	View / Edit
Moderator Registration	23 September 2019	Pending Final Approval	N/A	N/A	N/A	N/A	N/A	View / Edit



### 3. APPROVING BANKING DETAILS BY THE COMPANY CONTACT



14. The company contact will be able to review the banking details.

15. To view / download the bank letter or view the document history, click on the icons

HOLDING (PTY) LTD ( L16079 ) Banking Details




Current Banking Details

Bank Name \*  
FirstRand Bank Limited (FNB/RMB)

Bank Account Number \*  
6211111111111111

Bank Branch Code \*  
250655

Name Of Account Holder \*  
Test Company

Type	Original File Name	Uploaded By	Uploaded	Version	
Bank Letter Confirming Bank Details (Please note that this is not the Company Letterhead)	download.pdf	SDF Registration	08 Nov 2019 (16:08)	1	  

Approve  Reject

Reason For Rejection \*

- Banking details captured on the system do not match the supporting documentation
- Bank letter confirming banking details not provided
- Copy of bank letter confirming banking details not clear

16. Once, reviewed click approve or select a reject reason and click reject. If banking details were not approved the SDF will receive an email to update the banking details.

17. The details will go through an internal review process by the CATHSSETA.