



Cathsseta Integrated Management System (CIMS)

Mandatory Grants User Requirements

MG Process

1. Only Cathsseta Employers (entities with a L number) should have the ability to apply for a MG
2. MG window is open from 15 February each year to 30 April each year
3. Companies must apply for an extension online and it must be done at least 15 days before the 30 April. System must not allow extension applications after the 15 days before 30 April
4. Company must be able to view prior MG applications
5. Company can initiate a grant application once Company Details and banking details have been updated and they have confirmed
6. The financial year should default to the current financial year
7. Due date will automatically populate with 30 April of the current year, or alternatively a date supplied by the SETA in the event of the SETA providing extension.
8. At any stage during the capturing or approval process, the print report option will be available with current information. The report will be printed with current date until submitted at which point the submitted day will be displayed.
9. The first date of submission is to be saved so that it can print on the report when that option is selected. If there are multiple submissions with the SETA opening the forms up for the SDF, the original submission date is still to be retained (we use the latest details).
10. The following Sections must be displayed for All company sizes (small 1 – 49; medium – 50 – 149; large 150+)
 - a. Contact Details
 - b. Company User
 - c. Training Committee
 - d. Sites
 - e. Skills Requirements
 - f. Skills Gap
 - i. **Definition** (Skills Gaps refers to skills deficiencies in employees or lack of specific competencies by employees to undertake job tasks successfully to require industry standards. The term "top up" skills refers to skills gap and usually requires a short training intervention. Example, chef (occupation), training in communication (skills gap).
 - ii. **Add province field (drop-down list) in section 1 whether the answer to: Do you keep track of skills gaps in your organisation? Is Yes/No**
 - iii. **Section 2: Top 3 reasons for skills gaps per occupational category**
 1. Remove- Lack of relevant qualification
 2. Add these reasons:
 - a. Lack of Training
 - b. New job tasks
 3. Change- New Technology to Technological Changes
 - g. **Employee Profile** (All information in this section (employment data) needs to be linked to the province & sub sector & the SDL Number.)
 - h. **Employee Equity Profile**
 - i. **Hard to Vacancies**
 - i. **OFO Code change to OFO Code Occupation**

- ii. Additional Questions/ Requirements if selected **yes** to the question: Did you have any hard to fill vacancies in the past year?
 - 1. Add province field (drop-down list)
 - 2. Are these vacancies linked to transformation and employment equity within the company (Yes/ No)
 - a. If Yes complete information for Entry level/ Intermediate Level and Advanced Level
 - 3. Reason for difficulty experienced to fill vacancy
 - a. Change the option Positions does not pay a lot to alary salary considerations
 - b. Add: **Qualification Required** as an option
 - 4. Add Question: Is this Hard to fill Vacancy Skills Related / Non-skills Related
 - a. Once Reason for Hard to fill Vacancy has been selected, system must auto-populate (Skills Related/ Non-Skills Related)
 - 5. Period of vacancy
 - a. Remove less than 3 months and also remove 3 to 6 months and start as follows:
 - i. 6 Months to 1 year
 - ii. Over a year
 - j. Annual Training Report (Number of Beneficiaries who completed the Training interventions)
 - k. Impact Assessment
 - l. PIVOTAL Training Report - Number Trained
 - m. Planning Training (Unemployed and Employed)
 - n. Summary
 - i. Employment Summary
 - 1. Add column for Rural/ Urban and Province in Employee Profile/ Employee Equity Profile and Employee Status Profile
 - ii. Educational Profile
 - 1. Add summary table for Educational Profile (Description and Number of Employees)
 - o. PIVOTAL Plan Summary (Planned Training – Employed and Unemployed)
 - p. ATR Report Summary (Number of Beneficiaries who completed the Training interventions)
 - q. Planning Report Summary (Planned Training – Employed and Unemployed)
 - r. Only gets completed if you answer No to the question: Is what you have reported in line with what you've planned the year before
 - s. General Comments
 - i. The above general comments section is free text, no rules linked to its Just a text box which will allow the SDFs to capture their general comments in. Allow for 10 000 characters
 - t. Grant Application Signoff (Authorization page)
11. When submission, system to send out Acknowledgement emails to the following
- a. SDF

- b. Cathsseta Coordinator: MG Grants

Workflow

Step 1:

- 12. Task to be sent to designated persons – **Administrators** to do Validation (first)
 - a. Refer to 7. Evaluation of Mandatory Grant Application Form
 - b. If small:
 - i. If first time submission – then need to score 75% for evaluation
 - 1. So system must check historical MG application
 - ii. If second time or more – then need to score 100% for evaluation to take place
 - c. If medium/large
 - i. If first time submission – then need to score 75% for evaluation
 - 1. So system must check historical MG application
 - ii. If second time or more – then need to score 100% for evaluation to take place

Rules for evaluation:

- 1. If the organisation has 50 or more employees – then this becomes compulsory
- 2. Only where a company has submitted the Mandatory Grant Application Form will the evaluation for the year be available, if not submitted no evaluation form will be available. This form to be printed or copied to a word document
- 3. Has the training committee information been captured
 - 1. The system to test from the training committee tab that at least two entry has been completed and then automatically tick yes
 - 2. If no entry the system to automatically tick no
- 4. Total personnel budget been clearly reflected
 - 1. The system to test from the (Total personal Budget for the current financial year) form and automatically tick yes if added or no if no information
 - 2. 1% minimum training budget The system to test from the (Total personal Budget for the current financial year) form and automatically tick yes if added or no if no information.
- 5. Allocations for training interventions reflected on the budget.
 - 1. The system to test from the B form and automatically tick yes if added or no if no information
- 6. Is the ATR for the previous year reflected?
 - 1. The system to automatically tick yes if added or no if no information
- 7. The system to automatically tick yes if added or no if no information.
 - 1. (Scarce Skills Mandatory Grant Application Form)
- 8. Evaluated by Name of person evaluating to be entered – system generated
- 9. Date evaluated – system generated
- 10. Status.
- 11. All selection buttons to default to No
- 12. Tabs to all form should be available so that the evaluate can go back to the form at any given time

13. Add Final comment box at the bottom of the page to do final scoring all for 10 000

Step 2:

1. Task to be sent Administrator to **complete** Evaluation section
 1. Evaluation form for Small Companies
 2. Evaluation form for medium and large companies
 3. If approved task sent for validation, if rejected task is sent to holding room awaiting board decision
2. Task to be sent Validation Coordinator to **Approve/Reject** Evaluation (must see both Validation and Evaluation sections)
 1. Evaluation form for Small Companies
 2. Evaluation form for medium and large companies
 3. If approved proceed task sent to Manager awaiting final approval, if rejected task is sent to holding room awaiting board decision
3. System must generate report showing approvals/rejections

Step 3

4. System to generate list for approval and not approval (Every application in the holding room) and Coordinator: MG to upload documents that were signed off by
 1. BEC
 2. BAC
 3. EXCO
 4. Strat & Governance Committee
 5. Board

Step 4

5. Task must go to Manager to do **Final Batch** Approval/Reject
6. System sends final letter
 1. Approval
 2. Rejection

Step 5

7. If grant not approved, task to be sent to SDF to accept outcome or appeal and appeal must be done within 5 working days from date receiving letter (see email contents included as part of email)
 1. SDF must upload appeal letter on signed letter head
 2. SDF submits
 3. System to send reminder 1 day before due date to do submission
 4. If not done, system to close task and send same email sent out when application was not approved

Step 6

8. Task to go to Coordinator: MG Grants to review
 1. Approve, go to Step 6
 2. Reject, goes back to SDF and must be submitted within 5 working days

Step 7

9. Task to go Administrator and evaluation must be re-opened and re-assessed (means we will need to keep history of first submission)

Step 8

10. Validation Coordinator to do approval/reject
11. System must generate report showing approvals/rejections (we have this report already, but we will modify it)

Step 9

1. Validation Coordinator to do final approval/reject
2. System to send out final letter
 1. Appeal emails and letters (included in this email)

MANDATORY GRANT APPEAL OUTCOME EMAIL NOTIFICATION

Dear #Title# #First Name# #Surname#,

MANDATORY GRANT APPEAL OUTCOME FOR #COMPANY# - #ENTITY ID#

Kindly be advised that your Mandatory Grant Application has been re-evaluated on the basis of your appeal that was submitted on #appeal submission date#. The outcome of your appeal is contained in the attached letter.

For further information and any other queries please contact your respective Provincial Manager.

Regards,

#Name and Surname# (#Ms#)

Executive Manager: Skills Development

Evaluation

Please see attached the different forms that must appear on Evaluation form.

- Depending on the size of the company a form specific to the company size must appear.
- Grand total must appear calculating all the points
- If it's the 1st time submitting and if its less then 100% the second form must not open.
- If the second form is a minimum of 50% you get rejected.
- Add a new column Named Evidence Required. Which will contain documents that is related to the Criteria- (Please see Evidence Required Document)

Sign Off

- Training Committees member must be given the right to sign off on MG Applications
This can be added at the company registration process under Training committee.
- SDF, CEO & Training Committee member must have access to sign off on MG Application (Compulsory)
- CFO & Managing director must be given access to sign of the MG (Not Compulsory)
in the event that the CEO is not available
- A notification email must be sent to the CEO to constantly remind the person to sign off if they can't sign off then CFO and Managing Director will then be given the right to sign off.
- Amend current rejection letter that was sent to us. The rejection reason must pull through from the Evaluation section (rejection appeal letter)