



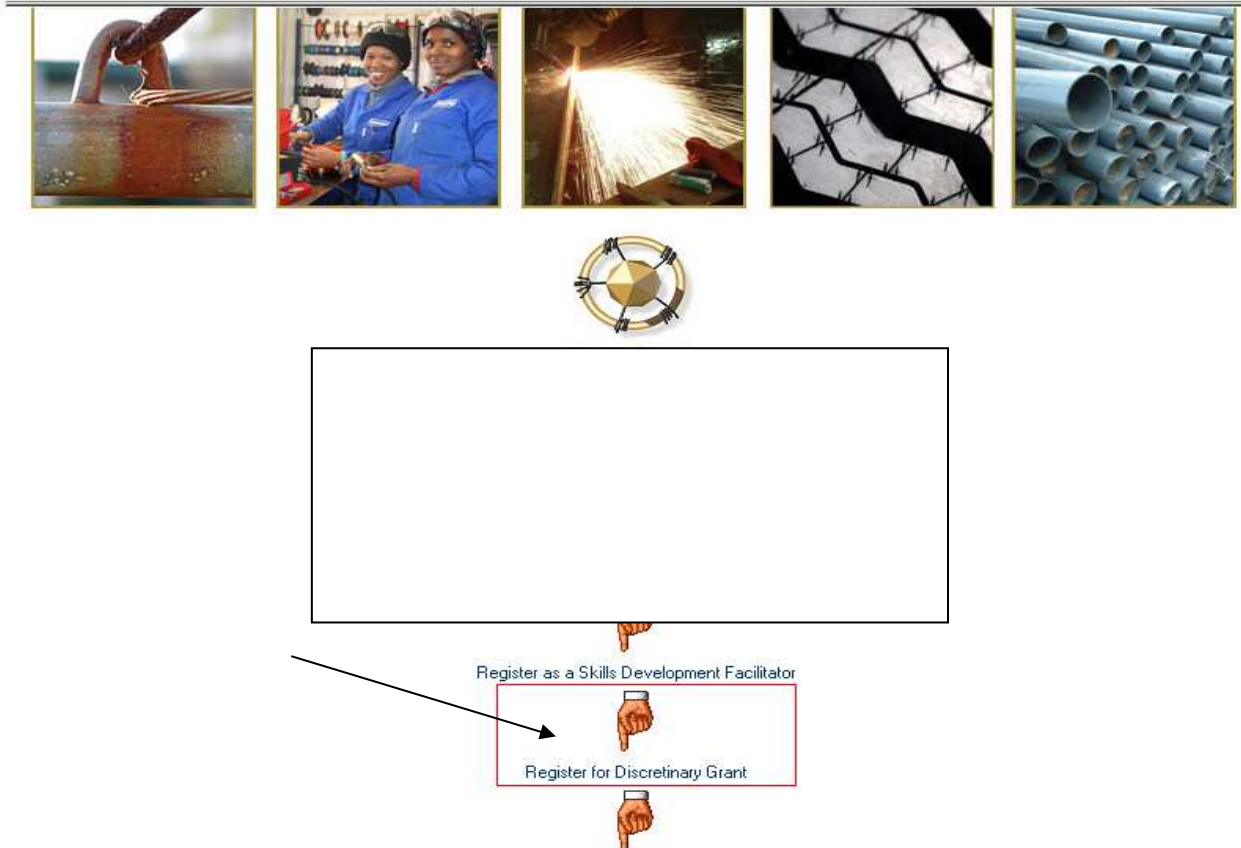
merSETA

**Discretionary Grants
Application
User Manual**

I. Logon to the system

To logon to the system follow the link on the merSETA website or go to the following website address: <http://196.4.89.14/cdas/merseta.asp>

The following screen will appear.




NOTE:

- If not already registered on the system, please follow the outlined steps in Section 1.
- If you are registered, please follow section2.

SECTION 1

Click on Register for Discretionary Grant as shown above.

The personal details form will open up where the users will capture and save their details

**Registration of a Discretionary Grants User**

Personal Details:

Surname	First Name	Initials	Title
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="v"/>
ID Number	(For statistical purposes only)		
<input type="text"/>	Gender	Population Group	Disabled
	<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="checkbox"/>
Highest Level of Education	<input type="text"/>		
Current Occupation	<input type="text"/>		
Contact Details	Cell Phone Number	<input type="text"/>	e.g. 082 555 5555
	Telephone Number	<input type="text"/>	e.g. (011) 555 5555
	Fax Number	<input type="text"/>	e.g. (011) 555 5555
	E-Mail Address	<input type="text"/>	
Postal Address	<input type="text"/>	City	<input type="text"/>
	<input type="text"/>	Postal Code	<input type="text"/>
		Province	<input type="text" value="v"/>
Physical Address	<input type="checkbox"/> (Tick if physical address same as postal address)		
	<input type="text"/>	City	<input type="text"/>
	<input type="text"/>	Postal Code	<input type="text"/>
		Province	<input type="text" value="v"/>
Other:			
General Comments	<input type="text"/>		
Username	<input type="text"/> (Minimum of 5 Characters)		
Password	<input type="text"/> (Minimum of 5 Characters)		
Confirm Password	<input type="text"/>		
User Group	<input type="text" value="Stakeholder Applicant"/>		

Please capture all the required information then click on the “Enter” button to save captured information.

The registration message will appear after clicking on the enter button confirming that the user account registration was successful.



User registration was successful ...

Details:

User Name: Ms. test Motsatsi
ID Number: 8410220000000
Gender: Female
Population Group: African
Username: tester
Password: abc123
SETA: MERSETA

Please store your username and password in a safe place, as you will be required to use them when you logon to the system.

Click on the Register an organisation tab at the bottom of the page to proceed with the registration.

The person details for this user already exists and is displayed on the screen for information purposes.

Register an Organisation

The system will open up the page where the user will “Add” the organisation to register against their profile.



ADD / REMOVE AN ORGANISATION

Instructions:

1. Add an organisation to the list by entering the organisations SDL Number and select the ADD button.
2. You may remove any organisation from the list by selecting the REMOVE icon.
3. Once you have finished adding all the organisations to your profile, click the finished button.

SDL Number:

Add NLP Organisation

Add Org in InterSETA Transfer

If the organisation is not in the system the user can still add an organisation to the system by selecting whether it is:

- A Non Levy Paying Organisation (NLP) / **Exempted within merSETA sector** or Organisation in process of an InterSETA Transfer

The system will return the screen below.



Registration of a Discretionary Grants User

ADD / REMOVE AN ORGANISATION

Instructions:

1. Add an organisation to the list by entering the organisations SDL Number and select the ADD button.
2. You may remove any organisation from the list by selecting the REMOVE icon.
3. Once you have finished adding all the organisations to your profile, click the finished button.

SDL Number:

ADD

Add NLP Organisation

Add Org in InterSETA Transfer

OR



Registration of a Discretionary Grants User

ADD / REMOVE AN ORGANISATION

Instructions:

1. Add an organisation to the list by entering the organisations SDL Number and select the ADD button.
2. You may remove any organisation from the list by selecting the REMOVE icon.
3. Once you have finished adding all the organisations to your profile, click the finished button.

SDL Number:

T000000001

ADD

Add NLP Organisation

Add Org in InterSETA Transfer

After clicking on either one of the organisations a popup shown below will appear. Please click on the "Enter" button to add a new organisation.



ADD ORGANISATION

The following organisation will be added to your profile Test Organisation

Click the enter button to add the organisation.

Back Enter

The organisation details form will open up, please capture the required information and click on the "Enter" button to save captured information.



Create a new organisation

Type of Organisation:	<input type="text" value="NLP"/>
Organisation Name:	<input type="text" value="Motsatsi & Associates"/>
Organisation Registration No:	<input type="text" value="201106056754"/>
SDL Number Type:	<input checked="" type="radio"/> System Generated
SDL Number:	<input type="text" value="N000009890"/>
Phone Number:	<input type="text" value="(011) 555-555"/> e.g. (011) 555-5555
Fax Number:	<input type="text"/> e.g. (011) 555-5555
Postal Address:	<input type="text" value="P O Box 184"/> <input type="text" value="Melville"/> <input type="text" value="Johannesburg"/> <input type="text" value="Gauteng South"/> <input type="text" value="2000"/>
Physical Address:	<input type="text" value="965 vaele street"/> <input type="text" value="Melville"/> <input type="text" value="Johannesburg"/> <input type="text" value="Gauteng South"/> <input type="text" value="2000"/>
Municipality:	<input type="text" value="Johannesburg Metro"/> <input type="button" value="..."/>

After saving the Organisation you have captured, the system will list all the Organisations the user is linked to under their profile as shown on the screen below.

You are required to submit a letter, signed by an authorised senior representative from the company, on a company letterhead confirming that the user has been authorised to submit the discretionary grant application on behalf of the company. Please upload the authorisation letter as outlined in Section 3.

The registration status of the organisation to your profile will be on "Pending" status until the merSETA has approved the application to register.

Once the status changes to approved, the user will be able to follow Section 2 to continue with the grant application.,

SECTION 2

How to access the Discretionary Grants application forms

The User will type in the Logon details , select “Merseta Grant Application” from the “Logon To” dropdown, then click on the Enter button to access the system as shown below





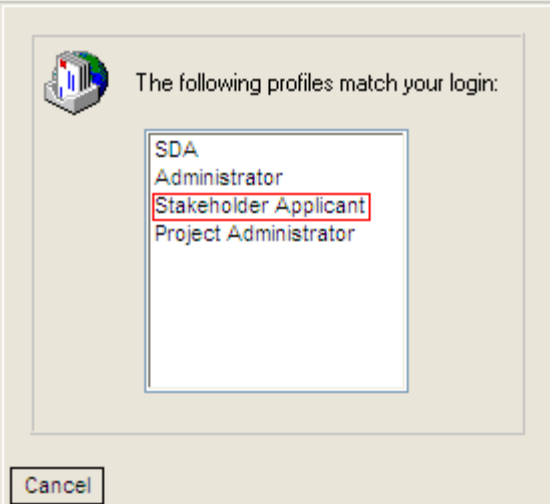
Username :
Password :
Logon to :

- Skills - Current Year
- Skills - Current Year
- MERSETA Grant Application**
- ETQA & LShips
- Project Management Facility


Register as a Skills Development Facilitator


Register for Discretionary Grant

Please select the “Stakeholder Applicant” if you are linked to more than one Profile



The following profiles match your login:

- SDA Administrator
- Stakeholder Applicant**
- Project Administrator

The user will be able to see all the organisations linked to their profile on approved or pending status.

Click on the organisation that are on Approved Status.

ADMIN ADMIN		STAKEHOLDER APPLICANT DASHBOARD	
Register or Remove an Employer.			
Discretionary Grant Funding (Please click on an organisation below to access their Discretionary Grant Funding)			
Organisation Name	SDL Number	Registration Status	Sites
Test Organisation	T000000001	Approved	Link Sites
NLP DG 1	N000009885	Pending	Link Sites
NLP DG 2	N000009886	Pending	Link Sites

The system will open up the Discretionary Grants system. Please select the year from the dropdown, then click on the Enter button.

The screenshot shows the 'Discretionary Grant Funding' interface for 'Test Organisation - T000000001'. The page title is 'Manufacturing Engineering & Related Services SETA'. There are three tabs: 'Discretionary Grant' (selected), 'Document Uploads', and 'Grants & Levies'. The main content area displays 'Test Organisation - T000000001' and 'Discretionary Grant Funding'. Below this, there is a prompt: 'Please select a Levy Year from the combo box below.' Underneath the prompt, it says 'Years available:' followed by a dropdown menu showing '1 April 2011 - 31 March 2012'. At the bottom, there is an 'Enter' button.

Please select the discretionary Grants on the dropdown then click on the enter button to activate the application forms.

Discretionary Grant | Document Uploads | Grants & Levies

Create a new Discretionary Grant Funding Submission

Discretionary Grant Funding
Test Organisation - T00000001
1 April 2011 - 31 March 2012



Submission No	Discretionary Grant Description	Grant Status	Application Status	From Date	To Date	Options	Print Report Options
DG April 2011_0001	DG6 TEST	Open	Pending	01/04/2011	31/03/2012	Submit	Print
DG April 2011_0002	DG6 TEST	Open	Pending	01/04/2011	31/03/2012	Submit	Print
DG April 2011_0003	DG6 TEST	Open	Application Submitted	01/04/2011	31/03/2012	Submit	Print


The form below will open up, please tick the relevant interventions in line with the DG criteria document, then click on the "Save" button.

Please select the interventions for the application.	
Intervention	
<input type="checkbox"/>	Atrami Apprenticeship application funding
<input type="checkbox"/>	CBMT Apprenticeship application funding
<input type="checkbox"/>	AATP Apprenticeship application funding
<input type="checkbox"/>	Motor time based Apprenticeship application funding
<input type="checkbox"/>	Metal and Plastics Apprenticeship application funding
<input type="checkbox"/>	Auto time based Apprenticeship application funding
<input type="checkbox"/>	Auto Apprenticeship application funding
<input type="checkbox"/>	Learnerships 18.1 application funding
<input type="checkbox"/>	Learnerships 18.2 application funding
<input type="checkbox"/>	Skills Programmes
<input type="checkbox"/>	ABET
<input type="checkbox"/>	Training specialists Assessors
<input type="checkbox"/>	Training specialists Skills development facilitators
<input type="checkbox"/>	Training specialists Moderators
<input type="checkbox"/>	Training specialists Mentors
Save	Cancel

The system will prompt you to confirm your selection.

The Discretionary Grants application main page will open as shown below. Please click on the select button to access the contact details.

Discretionary Grant | Document Uploads | Grants & Levies

TEST ORGANISATION - T000000001 Discretionary Grant Forms - Submission DG April 2010_0001
1 April 2010 - 31 March 2011 

[Main Page](#)

Discretionary Grant:- Status: Submitted [Submit](#)

#	Form	Description	Select
1.	1	Contact Details	Select
2.	2		
3.	3	Application Details	Select

Please complete the form with the details of the stakeholder and contact person, then click on the save button to save captured information.

Discretionary Grant | Document Uploads | Grants & Levies

Levy Number	T000000001
Address Physical	
Address Postal	
SDF	Admin Admin
SDF Telephone	0115551234
SDF Cellphone	082 334 2222
SDF Fax	0115551234
SDF Email	nperman@dts.co.za
Stakeholder Applicant	Test
Stakeholder Applicant Telephone	<input type="text" value="(011) 111-1111"/> e.g. (011) 555-5555
Stakeholder Applicant Cellphone	<input type="text" value="082 555 5555"/> e.g. 082 555 5555
Stakeholder Applicant Fax	<input type="text" value="(011) 111-4111"/> e.g. (011) 555-5555
Stakeholder Applicant Email address:	<input type="text" value="asujee@gmail.com"/>
Name of Contact	<input type="text" value="Nelly"/>
Surname of Contact	<input type="text" value="Perman"/>
Telephone	<input type="text" value="(011) 555-5555"/> e.g. (011) 555-5555
Cellphone	<input type="text" value="082 555 5555"/> e.g. 082 555 5555
Fax	<input type="text" value="(011) 555-5555"/> e.g. (011) 555-5555
Email address:	<input type="text" value="nperman@dts.co.za"/>
<input type="button" value="Save"/> <input type="button" value="Go to Next Form"/>	

Please click on the Discretionary tab to go back to the main page the click on the submit button to submit the Application.

The user is required to click on the “Application details” where the user will capture the relevant details against each intervention identified, by selecting the intervention on the drop down box. Select the site name against the intended intervention.

Please click on the save button to save the information captured.

Discretionary Grant | Document Uploads | Grants & Levies

SDF Tel Number	(010) 219-3000 <small>e.g. (011) 555-5555</small>
SDF Email Address:	lperman@dts.co.za
Chamber	Metal
CLO	L Joseph
Seta Region	
SDL #	T00000001
Company Name	Test Organisation
Sites	T00000002 - Subs T
No of Learners	2
Company Category	Established
Levies Contributed	R 3,000.00
Levy Status	
Intervention	CBMT Apprenticeship
Grant Amount	2000

Save

Disclaimer

Created By : Admin Admin
Date Created On : 25/07/2011


Application Details

Reference #	No of Learners	SDL #	Sites	Company Category	Intervention	Progression	Amount	CR #
DG April 2011_0001	20	T00000001	T00000001 - Test Organisation	Developmental	Leaverships 18.1 application funding	15	2000	1
DG April 2011_0001	10	T00000001	T00000001 - Test Organisation	Developmental	Leaverships 18.2 application funding	10	2000	0
DG April 2011_0001	10	T00000001	T00000001 - Test Organisation	Developmental	CBMT Apprenticeship application funding	0	2000	0

When the user clicks on the back to Discretionary grant button, the User is required to click the submit button as indicated below to submit the discretionary grant application.

TEST ORGANISATION - T000000001

Discretionary Grant Forms - Submission DG April 2011_0002
1 April 2011 - 31 March 2012



[Main Page](#)

Discretionary Grant: - Status: Application Submitted [Submit](#)

#	Form	Description	Select
1.	1	Contact Details	Select
3.	3	Application Details	Select

The grant application will then change to “Application Submitted” as highlighted below.


Submission No	Discretionary Grant Description	Grant Status	Application Status	From Date	To Date	Options	Print Report Options
DG April 2011_0001	DG6 TEST	Open	Pending	01/04/2011	31/03/2012	Submit	Print
DG April 2011_0002	DG6 TEST	Open	Application Submitted	01/04/2011	31/03/2012	Submit	Print
DG April 2011_0003	DG6 TEST	Open	Application Submitted	01/04/2011	31/03/2012	Submit	Print

SECTION 3

How to upload documents

Please click on the documents tab to upload documents.

Discretionary Grant | **Document Uploads** | Grants & Levies

Test Organisation - T000000001 Document Upload 

Supporting Document

Document:	Date Created:	User:	Delete
MerSETA05 FS SDF Workflowv1 1 13 January 2011Nelly Input.docx	26/7/2011	Admin Admin	<input type="button" value="Delete"/>
SKMBT_C22011052411410.pdf	26/7/2011	Admin Admin	<input type="button" value="Delete"/>
employer_data_template.xls	26/7/2011	Admin Admin	<input type="button" value="Delete"/>
Access to SMS.docx	28/7/2011	Admin Admin	<input type="button" value="Delete"/>

Training Committee Minutes(meeting must have taken place within the last 6 months of the application)

Document

Document:	Date Created:	User:	Delete
Employer errors.docx	25/7/2011	Admin Admin	<input type="button" value="Delete"/>
T000000013-Testing_Mandatory_Grants20110722_142450.pdf	28/7/2011	Admin Admin	<input type="button" value="Delete"/>

The user has an option to upload supporting documents or Training committee minutes.

Please click on the Browse button highlighted in red and a popup will appear giving the user an option to select the document from the saved destination on the user's computer, then click on the save button to save the uploaded document which will be listed underneath every option selected.

TIP: The authorisation letter can be scanned to the user's computer and uploaded on the system.

Once you have completed this process, the user can exit the system.