



Mandatory Grant Registration Manual



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1. Purpose of this Document

The purpose of this document is to assist the Skills Development Facilitator (SDFs), MERSETA Contracted Skills Development Facilitators (ISDFs) and Secondary SDFs to complete the Mandatory Grant Forms.

2. How to access the Skills System

Step 1: Via the internet enter the following URL <http://196.4.89.14/cdas/MERSETA.asp>

Step 2: Once the SDF has received notification from the merSETA that they have been accepted as SDF for the companies that they have registered for; only then can the SDF access the system.

To access the system the user must be connected to the internet. The user must enter the following URL into the system: <http://196.4.89.14/cdas/merseta.asp>

Fill in your username and password and, select Skills – Current Year under the Logon to dropdown.



| | |
|--------------------------------------|--|
| Username : | <input type="text"/> |
| Password : | <input type="password"/> |
| Logon to : | Skills - Current Year ▾ |
| <input type="button" value="Enter"/> | <input type="button" value="Change Password"/> |
| | <input type="button" value="Forgot Password"/> |

Deloitte.

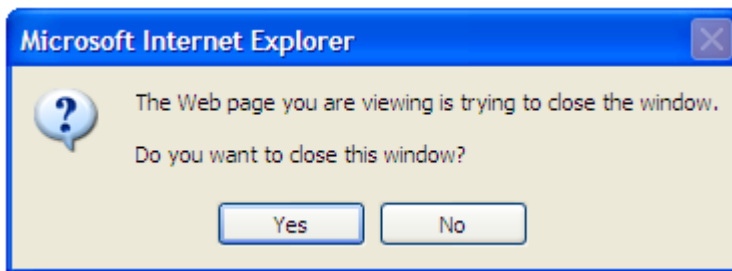
This site is best viewed in Microsoft Internet Explorer 6.0 with a Screen Resolution of 1024x 768



Click on the “Enter” button.

The following pop-up will appear: click Yes to close the screen.

Note: the user needs to make sure that their Pop-ups are turned off.



Click yes and this will take you through to the SDF dashboard

3. Home page

The Skills Development Facilitators Dashboard will appear. This screen is the home page for the SDF's.

ADMIN ADMIN

SKILLS DEVELOPMENT FACILITATOR DASHBOARD

1 April 2009 - 31 March 2010

Change

merSETA

WSP Year : 1 April 2006 - 31 March 2007

1 Planning
0 Implementation

TOOLS

IMPORTANT INFO: Please Read:

1. Register or Remove an Employer.
2. Edit Skills Development Facilitator details.

* Please note that this graph only displays Accepted WSP's and ATR's

Workplace Skills Plans for the Year 2009 (Please click on an organisation below to access their workplace skills plan)

| Organisation Name | SDL Number | Access | Plan Grant | Due Date | Imp Grant | Due Date |
|---------------------------|------------|----------|------------|------------|-----------|------------|
| Test Organisation | T000000001 | Accepted | Pending | 12/30/1899 | Pending | 12/30/1899 |
| ↳ Subs. Test Organization | T000000002 | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Page 1 of 1

< Back Next > 1 GO

The screen displays the following information:

- The yellow highlighted area in the screenshot above displays:
 - The organisations which the SDF has linked themselves too.
 - The organisation SDL number
 - Whether or not the user has access to the specific organisations details.
 - The Plan grant column displays the status of the WSP and ATR status for that specific financial year.

- The Due date- this column displays the WSP and ATR due date for that financial year.
- The Red highlighted area in the screenshot above displays:
 - Tools- this section allows the user to register a new organisation under his or her name and or to remove an organisation which was once registered under his or her name.
- The Blue highlighted area in the screenshot above displays:
 - This section is a dropdown which the user selects if they would like to view their history. Meaning all the companies linked to them at a specific time period.

REGISTER OR REMOVE AN EMPLOYER

Step 1: Click on "Register or Remove an Employer"

SKILLS DEVELOPMENT FACILITATOR DASHBOARD

ADMIN ADMIN 1 April 2010 - 31 March 2011
Change

TOOLS **IMPORTANT INFO: Please Read:**

1. Register or Remove an Employer.

2. Edit Skills Development Facilitator details.

Workplace Skills Plans for the Year 2010 **(Please click on an organisation below to access their workplace skills plan)**

| Organisation Name | SDL Number | Access | Plan Grant | Due Date | Imp Grant | Due Date |
|-------------------|------------|----------|------------|-----------|-----------|------------|
| Test Organisation | T000000001 | Rejected | Pending | 6/30/2010 | Pending | 12/30/1899 |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Step 2: To Remove an Employer click on the red cross under "Options"

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 SDF profile, click the icon.

SDL Number:

| # | Organisation Name | SDL Number | Registration Status | Options | Registration Form |
|----|-------------------|------------|---------------------|---------|-------------------|
| 1. | Test Organisation | T000000001 | Rejected | ✖ | ... |

Page 1 of 1 Records 1 to 1 of 1 Goto page 1 GO

Note: A pending login status indicated that the SETA needs to accept your registration before you are granted access to an organisations work:place skills plan.

Step 3: To Add an Employer fill in the L number in the "SDL Number" field and click on the "Add" button.

Step 4: Once you have finished adding all the organisations to your profile click on the "House" icon



EDIT SKILLS DEVELOPMENT FACILITATORS (SDF) DETAILS

Step 1: Click on "Edit Skills Development Facilitators Details"

SKILLS DEVELOPMENT FACILITATOR DASHBOARD

ADMIN ADMIN 1 April 2010 - 31 March 2011

TOOLS **IMPORTANT INFO: Please Read:**

- Register or Remove an Employer.
- Edit Skills Development Facilitator details.

Workplace Skills Plans for the Year 2010 **(Please click on an organisation below to access their workplace skills plan)**

| Organisation Name | SDL Number | Access | Plan Grant | Due Date | Imp Grant | Due Date |
|-------------------|------------|----------|------------|-----------|-----------|------------|
| Test Organisation | T000000001 | Rejected | Pending | 6/30/2010 | Pending | 12/30/1899 |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Page 1 of 1

The following screen will appear.

Personal Details:

| | | | |
|---|------------|----------|--------------------------------------|
| Surname (May only be altered by the SETA) | First Name | Initials | Title |
| Admin | Admin | t | Mr. <input type="button" value="v"/> |

Non-SA Citizen (For statistical purposes only)

| | | | |
|--|---------------------------------------|--|--------------------------|
| ID Number | Gender | Population Group (For statistical purposes only) | Disabled |
| Invalid South African ID Number 8604210340088 | Male <input type="button" value="v"/> | Indian <input type="button" value="v"/> | <input type="checkbox"/> |

Highest Level of Education: test

Job Title: test

Current Occupation: 111101 - Director (Enterprise / Organisation) (Skill Level 5)

Contact Details:

| | | | |
|------------------------------|-------------------|---|--|
| Cell Phone Number | 082 334 2222 | e.g. <input type="button" value="v"/> 082 555 5555 <input type="button" value="v"/> | |
| Telephone Number | 0115551234 | e.g. <input type="button" value="v"/> 011-555 5555 <input type="button" value="v"/> | |
| Alternative Telephone Number | | e.g. <input type="button" value="v"/> 011-555 5555 <input type="button" value="v"/> | |
| Fax Number | 0115551234 | e.g. <input type="button" value="v"/> 011-555 5555 <input type="button" value="v"/> | |
| E-Mail Address | asujee@dtss.co.za | | |

Postal Address:

| | | | |
|--|-------------|--|---|
| | City | | |
| | Postal Code | | Province <input type="button" value="v"/> |

(Tick if physical address same as postal address)

Physical Address:

| | | | |
|--|-------------|--|---|
| | City | | |
| | Postal Code | | Province <input type="button" value="v"/> |

Other:

Step 2: Change the information.

Step 3: Click on the "Enter" button at the bottom of the page.

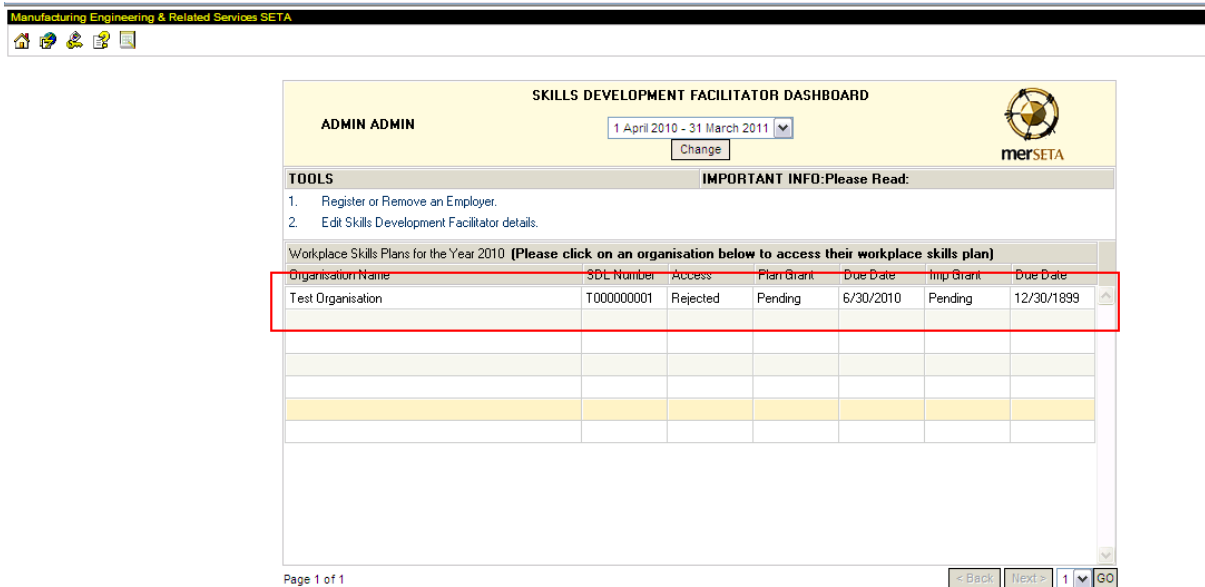


Step 4: Once you have finished adding all the organisations to your profile click on the "House" icon



4. ACCESSING ORGANISATION INFORMATION

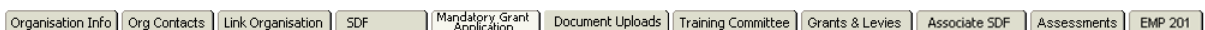
Step 1: To access the organisations details the user must place the cursor over the organisation name and click on the company that you want to access from the list of companies that are listed in your profile.



The screenshot shows the "SKILLS DEVELOPMENT FACILITATOR DASHBOARD" for a user named "ADMIN ADMIN". The dashboard includes a date range of "1 April 2010 - 31 March 2011" and a "merSETA" logo. Under the "TOOLS" section, there are instructions to "Register or Remove an Employer" and "Edit Skills Development Facilitator details". A table titled "Workplace Skills Plans for the Year 2010" is displayed, with a red box highlighting the first row: "Test Organisation" with an SDL Number of "T000000001", Access status of "Rejected", Plan Grant of "Pending", Due Date of "6/30/2010", Imp Grant of "Pending", and Due Date of "12/30/1899". The dashboard also shows "Page 1 of 1" and navigation buttons for "Back", "Next", and "GO".

Step 2: The system will open on the "Organisation Info" screen.

Step 3: There are 7 different Tabs: Organisation Info, Org Contacts, SDF, Mandatory grant Applications, Document Uploads, Training Committee, Grants & Levies, Associate SDF Assessments and EMP 201



Tabs

Organisation Info

The first tab is the “Organisation Details” tab. There are 2 sets of information on this screen. On the left is the Department of Higher Education data. We received this data from DHET and the user will not be able to change any of the information. On the Right is the “Seta Data”. If any of the information on the DHET side is incorrect or outdated, you will be able to make changes on the “Seta Data”.

The SDF has access to view both the SETA information and the DHET information.

| Organisation Info | Org Contacts | Link Organisation | SDF | WSP Plan & Report | Document Uploads | Training Committee | Grants & Levies | Associate SDF | EMP 201 |
|---|-------------------|-------------------|-----|-------------------|--|--------------------|-----------------|---------------|---------|
| This organisation is registered with an unknown SETA. | | | | | | | | | |
| DEPARTMENT OF LABOUR DATA | | | | | Manufacturing Engineering & Related Services SETA DATA | | | | |
| Organisation Name: | Test Organisation | | | | Test Organisation | | | | |
| Organisation Registration No: | T000000001 | | | | T000000001 | | | | |
| SDL Number: | T000000001 | | | | T000000001 | | | | |
| Phone Number: | | | | | 011 376 5678 e.g. (011) 555-5555 | | | | |
| Fax Number: | | | | | 011 376 5679 e.g. (011) 555-5555 | | | | |
| Email address: | | | | | mmngomezulu@dtsa.co.za | | | | |
| Current SETA Region: | | | | | [Dropdown] | | | | |
| New SETA Region: | | | | | [Dropdown] | | | | |
| Magisterial District: | | | | | [Dropdown] | | | | |
| Postal Address: | Unknown | | | | 231 great street | | | | |
| | | | | | Danville Boulevard | | | | |
| | | | | | [Dropdown] | | | | |
| | | | | | Gauteng [Dropdown] | | | | |
| | | | | | 2233 | | | | |
| Physical Address: | | | | | <input type="checkbox"/> (Tick if physical address same as postal address) | | | | |
| | | | | | 231 great street | | | | |

Org Contacts

| Organisation Info | Org Contacts | Link Organisation | SDF | WSP Plan & Report | Document Uploads | Training Committee | Grants & Levies | Associate SDF | EMP 201 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--------------|-------------------|------------|-------------------|------------------|--------------------|-----------------|---------------|---------|----------------|------------|-----------|------------|-----------------|-------------|----------|--------|---------|--------|----------------|---------|-----------------------------------|--------|----------|--------|-------|--------|-----------|--------|---------|--------|-----------|------------|--------------|--------|--|--|--------------|--------|
| ORGANISATION CONTACTS: TEST ORGANISATION - T000000001 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div style="border: 1px solid #ccc; padding: 5px;"> <div style="text-align: right; margin-bottom: 5px;"> <input type="button" value="Search Person"/> </div> <p>Add contact person:</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Title:</td> <td style="width: 25%;">[Dropdown]</td> <td style="width: 25%;">Phone No:</td> <td style="width: 25%;">[Text]</td> <td style="width: 25%;">Postal Address:</td> <td style="width: 25%;">[Text]</td> </tr> <tr> <td>Surname:</td> <td>[Text]</td> <td>Fax No:</td> <td>[Text]</td> <td></td> <td>[Text]</td> </tr> <tr> <td>First name:</td> <td>[Text]</td> <td>Cell No:</td> <td>[Text]</td> <td>City:</td> <td>[Text]</td> </tr> <tr> <td>Initials:</td> <td>[Text]</td> <td>E-Mail:</td> <td>[Text]</td> <td>Province:</td> <td>[Dropdown]</td> </tr> <tr> <td>Designation:</td> <td>[Text]</td> <td></td> <td></td> <td>Postal Code:</td> <td>[Text]</td> </tr> </table> <div style="text-align: right; margin-top: 5px;"> <input type="button" value="Enter"/> </div> </div> | | | | | | | | | | Title: | [Dropdown] | Phone No: | [Text] | Postal Address: | [Text] | Surname: | [Text] | Fax No: | [Text] | | [Text] | First name: | [Text] | Cell No: | [Text] | City: | [Text] | Initials: | [Text] | E-Mail: | [Text] | Province: | [Dropdown] | Designation: | [Text] | | | Postal Code: | [Text] |
| Title: | [Dropdown] | Phone No: | [Text] | Postal Address: | [Text] | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Surname: | [Text] | Fax No: | [Text] | | [Text] | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| First name: | [Text] | Cell No: | [Text] | City: | [Text] | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Initials: | [Text] | E-Mail: | [Text] | Province: | [Dropdown] | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Designation: | [Text] | | | Postal Code: | [Text] | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>#</th> <th>Title</th> <th>Surname</th> <th>First name</th> <th>Initials</th> <th>Designation</th> <th>Phone No</th> <th>Fax No</th> <th>Cell No</th> <th>E-Mail</th> <th>Postal Address</th> <th>Options</th> </tr> </thead> <tbody> <tr> <td colspan="12" style="text-align: center; height: 40px;">No organisation contacts found...</td> </tr> </tbody> </table> | | | | | | | | | | # | Title | Surname | First name | Initials | Designation | Phone No | Fax No | Cell No | E-Mail | Postal Address | Options | No organisation contacts found... | | | | | | | | | | | | | | | | | |
| # | Title | Surname | First name | Initials | Designation | Phone No | Fax No | Cell No | E-Mail | Postal Address | Options | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| No organisation contacts found... | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

The user needs to make sure that the important contact persons in the organisations' details are captured on this page. This will be for example the CEO, Human Resource Manager or the Financial Managers details. It is important to have these contact details should the Seta need to send out invitations or any other relevant communication.

SDF


The Skills Development Facilitator (SDF) can also edit their information on this screen. Remember to click on the "Enter" button to save changes.

You can also select the SDF type on the drop down menu to view information of the secondary SDF that is linked to your company.

Organisation Info | Org Contacts | Link Organisation | SDF | WSP Plan & Report | Document Uploads | Training Committee | Grants & Levies | Associate SDF | EMP 201

TEST ORGANISATION
T00000001

SKILLS DEVELOPMENT FACILITATOR



*** Note: To view Secondary SDF or ISDF, select from the dropdown below.**

SDF Type: SDF

Personal Details:


| | | | |
|--|---------------------------------|---------------------|--------------------------|
| Surname | First Name | Initials | Title |
| Georghiou | Margotte | M | Ms. |
| Non-SA Citizen (For statistical purposes only) | | | |
| <input type="checkbox"/> | | | |
| ID Number | (For statistical purposes only) | | |
| Valid South African ID Number | Gender | Population Group | Disabled |
| 8507260005083 | Female | White | <input type="checkbox"/> |
| Highest Level of Education | BCom Degree | | |
| Job Title | IT Systems Analyst | | |
| Current Occupation | 111201 - Group Manager | | |
| Cell Phone Number | 0835667950 | e.g. 082 555 5555 | |
| Telephone Number | 0124820007 | e.g. (011) 555 5555 | |

WSP Plan and Report

Create a new Mandatory Grant Application:

Year: Enter

MANDATORY GRANT APPLICATION
TEST ORGANISATION - T00000001



| # | Workplace Skills Plan Year | Linked | Planning Grant | | | Interim Grant | Implementation Grant | | | Options | Print Options |
|---|------------------------------|--------|----------------|------------|---------------|---------------|----------------------|--------------|---------------|---------|---------------|
| | | | Status | Due Date | Accepted Date | Status | Status | Due Date | Accepted Date | | |
| 4 | 1 April 2006 - 31 March 2007 | No | Accepted | 30/06/2006 | 03/12/2009 | | Select 05/06 | Select 06/07 | Print | | |
| 5 | 1 April 2007 - 31 March 2008 | No | Accepted | 30/06/2007 | 03/12/2009 | | Select 06/07 | Select 07/08 | Print | | |
| 6 | 1 April 2008 - 31 March 2009 | No | Accepted | 30/06/2008 | 03/12/2009 | | Select 07/08 | Select 08/09 | Print | | |
| 7 | 1 April 2009 - 31 March 2010 | No | Accepted | 30/06/2009 | 03/12/2009 | | Select 08/09 | Select 09/10 | Print | | |
| 8 | 1 April 2010 - 31 March 2011 | No | Submitted | 30/06/2010 | | 04/03/2010 | Select 09/10 | Select 10/11 | Print | | |
| 9 | 1 April 2011 - 31 March 2012 | No | Submitted | 30/06/2011 | | 11/11/2010 | Year 12 Application | | Print | | |

To create a new Mandatory Grant Application for the next financial year, you need to select the year in the dropdown box and then click on the Enter button (highlighted in Pink). It will then add the new Workplace Skills Plan at the bottom of the previously created/ submitted Mandatory grants (Highlighted in red).

On this page you will be able to see the Mandatory Grant Application that are/were already created. You will be able to view the details by clicking on the **Year 12 Application** button.


The user will also be able to view the entire WSP and ATR report in a word format



. Also displayed on this page is the status of the Mandatory Grant, the Due Date and the Accepted Date and the submission date. The SDF will only be able to view information after the due date has been reached.

To view/capture data in the different tables you need to click on the “**Year 12 Application button**” (note that the year will change on the selection button). It will then take you to the list of forms for the specific year.

5. Accessing the Mandatory Grant Application Forms

When selecting the application the following screen will appear with a  button for each form to be completed

Customise

Select the **Customise** button to customise your organisations **Skill Priorities, Occupational Categories** and **Job Titles**.

Customise

Planning Grant:- (An approved SDF is required before this status may be changed) Status: Submitted

| # | Form | Description | Due Date | Select |
|----|------|--------------------------------|-----------|---------------------------------------|
| 1. | 1 | Company Administrative Details | 30/6/2011 | <input type="button" value="Select"/> |
| 2. | 2 | Person Details | 30/6/2011 | <input type="button" value="Select"/> |
| 3. | 3 | Employment Data | 30/6/2011 | <input type="button" value="Select"/> |
| 4. | 4 | Workplace Skills Plan | 30/6/2011 | <input type="button" value="Select"/> |
| 5. | 5 | Annual Training Report | 30/6/2011 | <input type="button" value="Select"/> |
| 6. | 6 | Training Done with Other SETAs | 30/6/2011 | <input type="button" value="Select"/> |
| 7. | 7 | Experiential Training Summary | 30/6/2011 | <input type="button" value="Select"/> |
| 8. | 8 | ABET Report | 30/6/2011 | <input type="button" value="Select"/> |
| 9. | 9 | Sign Off | 30/6/2011 | <input type="button" value="Select"/> |

a. Company Administrative details

When selecting the Company Administrative Details form the following screen will appear and all fields need to be completed.

| Back to WSP | | Company Administrative Details 1 April 2011 - 31 March 2012 | | TEST ORGANISATION | |
|---------------------------------|---|--|--------------------|-------------------|--|
| Name of Company | Test Organisation | Trading As: | Test Organisation | | |
| Number of Employees | 50 | | | | |
| Physical Address | 231 great street | Postal Address | P.O Box 2000 | | |
| | Pretoria | | Pretoria | | |
| | Gauteng | | Gauteng | | |
| | 2233 | | 2233 | | |
| Telephone Number: | 011 376 5679 | Fax Number: | 011 376 5679 | | |
| Company E-mail: | asujee@dtss.co.za | | | | |
| Levy Number | T00000001 | Company Registration No: | T00000001 | | |
| SETA to which affiliated | MANUFACTURING, ENGINEERING AND RELATED SERVICES | Chamber | Plastics | | |
| Additional Levy Numbers | | | | | |
| Name of Company | | | Levy Number | | |
| Subs Test Org | | | Levy Number | T00000002 | |
| CURRENT BANK DETAILS | | | | | |
| Bank Name | | | First Rand | | |
| Account Number | | | 34566778 | | |
| Branch Number | | | 26233 | | |

| CONFIRMATION DETAILS | |
|---|-------------------------------------|
| The Administrative Details given above are correct(please confirm) | <input checked="" type="checkbox"/> |
| The Banking Details given above are correct | <input type="checkbox"/> |
| The Banking Details have changed | <input checked="" type="checkbox"/> |
| If the bank details are different, you can either upload a used company cheque below(only .docx, .doc, .pdf, .tif, .jpg and .gif files accepted) or can still fax the cancelled or used company cheque to 086 670 4881 . | |
| <input type="button" value="Upload File"/> | |
| View Uploaded Documents | |
| Test.docx | <input type="button" value="View"/> |

Go to Form

Should the banking details have changed, the SDF has the option to upload the cancelled or used cheque or fax it to the dedicated administrator's fax number

Please note that on each separate form or page the following dropdown box is available to select the next form you want to access.

Go to Form

- Company Administrative Details
- Person Details
- Employment Data
- Workplace Skills Plan
- Annual Training Report
- Training Done with Other SETAs
- Experiential Training Summary
- ABET Report
- Sign Off

b. Person Details

This is the details of the person completing the Mandatory Grant Application.

| Back to WSP | | Person Details | | TEST ORGANISATION - T000000001 |
|--|-------------------------------|----------------------------------|-------------------|--------------------------------|
| DETAILS OF PERSON COMPLETING THE FROM | | | | |
| Title | Mr | | | |
| Name | test | Surname | tester | |
| ID Number | 8410030000000 | Position in Company | Manager | |
| Telephone Number | 011 | Fax Number | 0114820024 | |
| Email | ttester@seta.org | | | |
| DETAILS OF MERSETA PERSON WHO ASSISTED IN COMPLETING THE FROM | | | | |
| Title | Mrs | | | |
| Name | Tes | Surname | Test | |
| Position in Company | Skills Manager | | | |
| Telephone Number | 011 551 2222 | Fax Number | 011 551 2224 | |
| Email | TT @merseta.co.za | | | |
| DETAILS OF SKILLS DEVELOPMENT FACILITATOR | | | | |
| SDF ID Number | 8604210340088 | | | |
| Name | Admin | Surname | Admin | |
| Phone | 0115551234 | Fax | 0115551234 | |
| Cell Number | 082 334 2222 | Email | asujee@dtss.co.za | |
| Postal Address | 1 test pla 1 0000 | | | |
| <input type="button" value="Save"/> | Go to Form | <input type="button" value="▼"/> | | |



c. Employment Data

Specialization Field

The user will be able to search for the specializations as follows:

| | | | |
|-------------------|----------------------|--------------------------|------------------------------------|
| Occupational Code | <input type="text"/> | Occupational Description | <input type="button" value="..."/> |
|-------------------|----------------------|--------------------------|------------------------------------|

When clicking on the radio button next to the "Occupational Description", the system will open a dialog box where the user can then search for the occupation.

| OFO Code Search | | |
|-----------------|--------------------------------------|---|
| OFO Code | <input type="text" value="552302"/> |  Search  Reset |
| OFO Description | <input type="text"/> | |
| Search Results | | |
| OFO Code | OFO Description | Options |
| 552302 | Insurance Consultant (Skill Level 2) | Select |

Type in the “OFO Code” or the “OFO Description” and then click on the “Search” button. The system will then return the details of the OFO code with an option to select the code. The user will then click on the “Select” option, and the system will then add it in the OFO code and OFO description boxes.

| | | | | |
|-------------------|-------------------------------------|--------------------------|---|-----|
| Occupational Code | <input type="text" value="552302"/> | Occupational Description | <input type="text" value="Insurance Consultant (Skill Level 2)"/> | ... |
|-------------------|-------------------------------------|--------------------------|---|-----|

Demographical and Employee Age Field:

| AFRICAN | | | COLOURED | | | INDIAN/ASIAN | | | WHITE | | OTHER | | | AGE GROUP | | | | |
|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|
| M | F | D | M | F | D | M | F | D | M | F | D | M | F | D | <34 | 35-49 | 50-64 | 65+ |
| <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"/> | <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text" value="0"/> |

Add the demographical information per race and per gender in the above table, as well as the disability information.

The system will only total the Male and Female information as the Disability information forms part of the Male and Female breakdown.

The system will test that the information added in the Age Group breakdowns are equal to the information added in the race, gender breakdown.

When all of the above have been populated the user needs to click on a save button and the system will save the all the information in a grid format. Each piece of information added will be saved in its own row.

Each row will have an “Edit” button should the user wish to edit the information

Each row will have a “Delete” button should the user wish to delete the information.

| Back to WSP | Employment Data | TEST ORGANISATION - T000000001 | | | | | | | | | | | | | | |
|--------------------------------|---|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|
| Occupational Code | <input type="text"/> | Occupational Description | <input type="text"/> | ... | | | | | | | | | | | | |
| EMPLOYEE AGE | AFRICAN FEMALES | | COLOURED FEMALES | | INDIAN FEMALES | | WHITE FEMALES | | AFRICAN MALES | | COLOURED MALES | | INDIAN MALES | | WHITE MALES | |
| <35 | 35-55 | 55+ | A | D | A | D | A | D | A | D | A | D | A | D | A | D |
| <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"/> | <input type="text" value="0"/> | <input type="text" value="0"/> |
| Save | Import Employment Data from Previous Year | Go to Form | <input type="text"/> | ▼ | | | | | | | | | | | | |

d. Workplace Skills Plan

IMPORT AND EXPORT FUNCTIONALITY

To import Employment Data from the previous years, select “Employment Data” by clicking on the “Select” button

| Planning Grant:- | | (An approved SDF is required before this status may be changed) | | Status: Submitted | Enter |
|------------------|------|---|-----------|-------------------|-------|
| # | Form | Description | Due Date | Select | |
| 1. | 1 | Company Administrative Details | 30/6/2011 | Select | |
| 2. | 2 | Person Details | 30/6/2011 | Select | |
| 3. | 3 | Employment Data | 30/6/2011 | Select | |
| 4. | 4 | Workplace Skills Plan | 30/6/2011 | Select | |
| 5. | 5 | Annual Training Report | 30/6/2011 | Select | |
| 6. | 6 | Training Done with Other SETAs | 30/6/2011 | Select | |
| 7. | 7 | Experiential Training Summary | 30/6/2011 | Select | |
| 8. | 8 | ABET Report | 30/6/2011 | Select | |
| 9. | 9 | Sign Off | 30/6/2011 | Select | |

Click on “Import Employment Data from Previous Year”

| EMPLOYEE AGE | | | AFRICAN FEMALES | | COLOURED FEMALES | | INDIAN FEMALES | | WHITE FEMALES | | AFRICAN MALES | | COLOURED MALES | | INDIAN MALES | | WHITE MALES | |
|--------------|-------|-----|-----------------|---|------------------|---|----------------|---|---------------|---|---------------|---|----------------|---|--------------|---|-------------|---|
| <35 | 35-55 | 55+ | A | D | A | D | A | D | A | D | A | D | A | D | A | D | A | D |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Save Import Employment Data from Previous Year Go to Form

Click on the tick box next to the employment data that you want to export.

| EMPLOYEE AGE | | | AFRICAN FEMALES | | COLOURED FEMALES | | INDIAN FEMALES | | WHITE FEMALES | | AFRICAN MALES | | COLOURED MALES | | INDIAN MALES | | WHITE MALES | |
|--------------|-------|-----|-----------------|---|------------------|---|----------------|---|---------------|---|---------------|---|----------------|---|--------------|---|-------------|---|
| <35 | 35-55 | 55+ | A | D | A | D | A | D | A | D | A | D | A | D | A | D | A | D |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Save Import Employment Data from Previous Year Go to Form

| Specialization | OFO | AFRICAN FEMALES | | COLOURED FEMALES | | INDIAN FEMALES | | WHITE FEMALES | | AFRICAN MALES | | COLOURED MALES | | INDIAN MALES | | WHITE MALES | | TOTAL | EDIT | DELETE | | |
|--|--------|-----------------|----------|------------------|----------|----------------|----------|---------------|----------|---------------|----------|----------------|----------|--------------|----------|-------------|----------|----------|----------|----------|------|--------|
| | | AfrFA | AfrFD | ColFA | ColFD | IndFA | IndFD | WhFA | WhFD | AfrMA | AfrMD | ColMA | ColMD | IndMA | IndMD | WhMA | WhMD | M | F | D | | |
| <input checked="" type="checkbox"/> Medical Superintendent (Skill Level 5) | 134201 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | Edit | Delete |
| <input checked="" type="checkbox"/> Medical Superintendent (Skill Level 5) | 134201 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | Edit | Delete |
| <input checked="" type="checkbox"/> Medical Superintendent (Skill Level 5) | 134201 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | Edit | Delete |
| Sub Total | | 0 | 0 | 0 | 0 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3 | 0 | | |
| Grand Total (M + F) | | | | | | | | | | | | | | | | | | | 3 | | | |

Page Number 1 < Back Next > Goto Page 1 GO Display records per page Export to WSP Export to ATR Delete Selected

The system will test that the information added in the Age Group breakdowns are equal to the information added in the race, gender breakdown.

ABET Levels

The total number of information added in the ABET levels should be the same as the information entered in the demographical section.

When all of the above have been populated the user needs to click on a save button and the system will save the all the information in a grid format. Each piece of information added will be saved in its own row.

Each row will have an "Edit" button should the user wish to edit the information

Each row will have a "Delete" button should the user wish to delete the information.

| | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|------------------------|-------------------------------------|-----------|---------------------------|-----------|-----------------------------|-----------|--------------------|-----------|---------------------------------|-----------|-------------------------------|----------|----------|----------|----------|------------|------------|-----------|----------|-----------|-----------|-----------|-----------|--------|--|
| Back to WSP | | Implementation Grant ABET Report | | | | | | | | | | TEST ORGANISATION - T00000001 | | | | | | | | | | | | | | |
| ABET Summary | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Abet Learning Area <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | |
| EMPLOYEE AGE | | | | | | | | | | | | | | | LEVEL | | | | | | | | | | | |
| <35 | 35-55 | 55> | AfrF | ColF | IndF | WhF | AfrM | ColM | IndM | WhM | AfrDis | ColDis | IndDis | WhDis | 1 | 2 | 3 | 4 | | | | | | | | |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | | | | | | | |
| Save Go to Form | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ABET Summary | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Training Course Type | <35 | 35-55 | 55> | AfrF | ColF | IndF | WhF | AfrM | ColM | IndM | WhM | AfrDis | ColDis | IndDis | WhDis | TOTAL | LEVEL | EDIT | DELETE | | | | | | |
| <input type="checkbox"/> | Industrial Engineering | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 1 | Edit | Delete | | | |
| <input type="checkbox"/> | Maths 1 | 80 | 20 | 0 | 30 | 20 | 10 | 0 | 20 | 10 | 10 | 0 | 0 | 0 | 0 | 0 | 40 | 60 | 0 | 40 | 20 | 20 | 20 | Edit | Delete | |
| Sub Total | | 81 | 20 | 0 | 30 | 20 | 10 | 0 | 20 | 11 | 10 | 0 | 0 | 0 | 0 | 0 | 0 | 41 | 60 | 0 | 40 | 20 | 20 | 21 | | |
| Grand Total (M + F) | | 101 | | | | | | | | | | | | | | | 101 | 101 | | | | | | | | |
| Page Number 1 | | Back | | Next > | | Goto Page 1 | | GO | | Delete Selected | | | | | | | | | | | | | | | | |

Sign Off

The sign-off on this page will constitute a submission.

| | | | | | | | | | | | | | | | | | |
|--|--|----------|--|--|--|--|--|--|--|-----------------|--|-------------------------------|--|--|--|--|--|
| Back to WSP | | Sign Off | | | | | | | | | | TEST ORGANISATION - T00000001 | | | | | |
| Please sign off once you have completed the application. The signoff will constitute a submission. | | | | | | | | | | | | | | | | | |
| The grant will be processed and if approved the first payment will be made subject to your levies being received by MERSETA. | | | | | | | | | | | | | | | | | |
| Sign Off | | | | | | | | | | | | | | | | | |
| I, the undersigned, confirm that I have been authorised by this organisation to submit their Mandatory Grant information. I declare that to the best of my knowledge the information contained herein is accurate and up to date. I recognise inaccurate information constitutes fraud and that it will be subject to the full penalty of the law. | | | | | | | | | | | | | | | | | |
| Signed off by | | | | | | | | | | | | | | | | | |
| SDF | | | | | | | | | | Date | | | | | | | |
| Ailze Groenewald | | | | | | | | | | 11/11/2010 | | | | | | | |
| Once you have signed off below, you will no longer be able to change this application. | | | | | | | | | | | | | | | | | |
| SDF Signoff | | | | | | | | | | | | | | | | | |
| The MERSETA encourages companies to consult employee representatives and to facilitate the sign off of the application by the employee representative. | | | | | | | | | | | | | | | | | |
| Employee Representative | | | | | | | | | | Position | | | | | | | |
| Tes Test | | | | | | | | | | Skills Manager | | | | | | | |
| Emp Rep Signoff | | | | | | | | | | | | | | | | | |
| Go to Form | | | | | | | | | | | | | | | | | |

Print Report Options

| # | Skills Year | Linked | Grant Status | Due Date | Accepted Date | Submission Date | Mandatory Grant Application | | Print Report Options |
|---|------------------------------|--------|--------------|------------|---------------|-----------------|-----------------------------|--------------|----------------------|
| 4 | 1 April 2006 - 31 March 2007 | No | Accepted | 30/06/2006 | 03/12/2009 | | Select 05/06 | Select 06/07 | Print |
| 5 | 1 April 2007 - 31 March 2008 | No | Accepted | 30/06/2007 | 03/12/2009 | | Select 06/07 | Select 07/08 | Print |
| 6 | 1 April 2008 - 31 March 2009 | No | Accepted | 30/06/2008 | 03/12/2009 | | Select 07/08 | Select 08/09 | Print |
| 7 | 1 April 2009 - 31 March 2010 | No | Accepted | 30/06/2009 | 03/12/2009 | | Select 08/09 | Select 09/10 | Print |
| 8 | 1 April 2010 - 31 March 2011 | No | Submitted | 30/06/2010 | | 04/03/2010 | Select 09/10 | Select 10/11 | Print |
| 9 | 1 April 2011 - 31 March 2012 | No | Submitted | 30/06/2011 | | 11/11/2010 | Year 12 Application | | Print |

When you click on the “Print” button the system will generate a report of all the information that has been captured on the mandatory grant application. You will be able to copy this document to Microsoft Word or to Print the form directly.

Documents Upload

Organisation Info | Org Contacts | Link Organisation | SDF | **Mandatory Grant Application** | Document Uploads | Training Committee | Grants & Levies | Approve SDF | Assessments | EMP 201

Test Organisation - T000000001 merSETA

Document Uploads

Please select a Levy Year from the combo box below.

Years available :

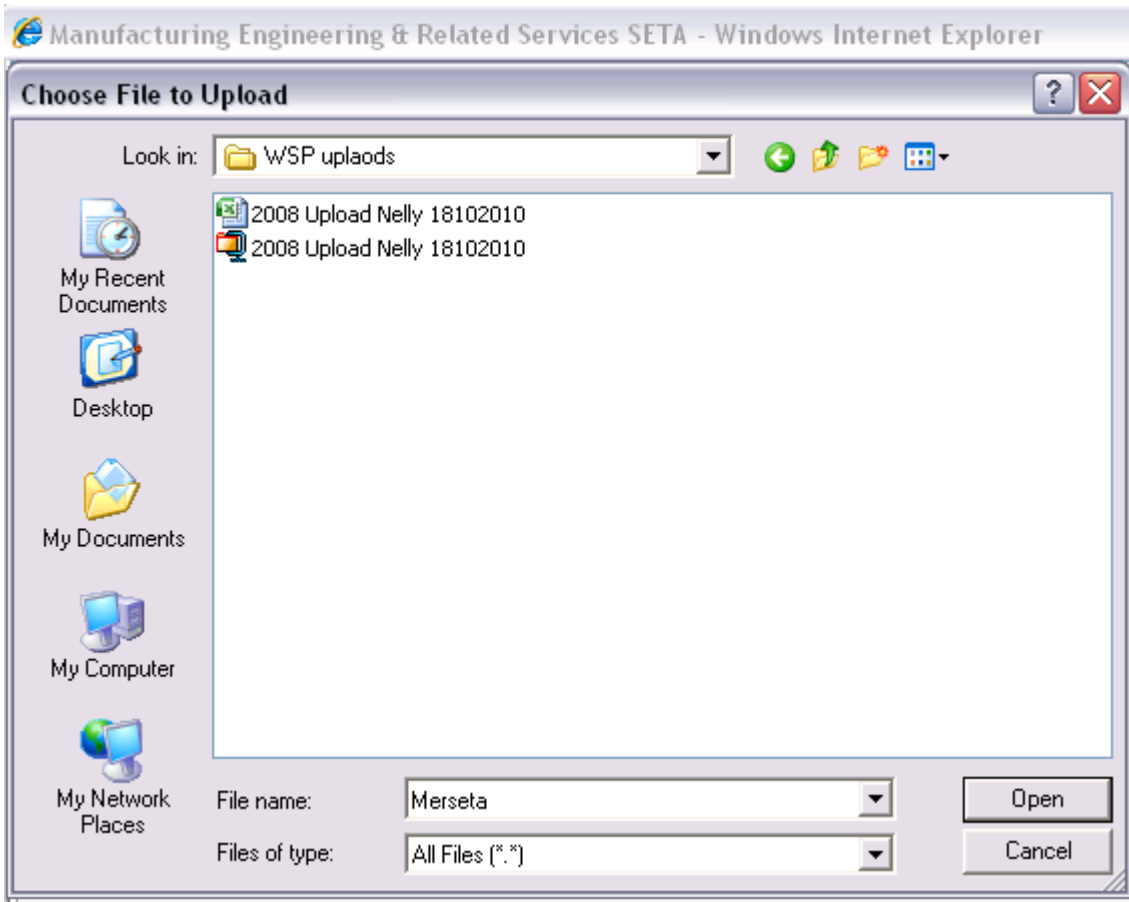
1 April 2010 - 31 March 2011

Upload Cancelled Cheque / Proof of Banking Details

| Cancelled Cheque / Proof of Banking Details | Document: | Approved | Date Uploaded | Uploaded By | Delete |
|---|-----------|--------------------------|----------------------|-------------|--------|
| error_test.docx | | <input type="checkbox"/> | 3/4/2010 11:52:26 AM | | |

The document upload tab has been created to allow the SDF to upload soft copy documentation, which the SETA needs with your submissions.

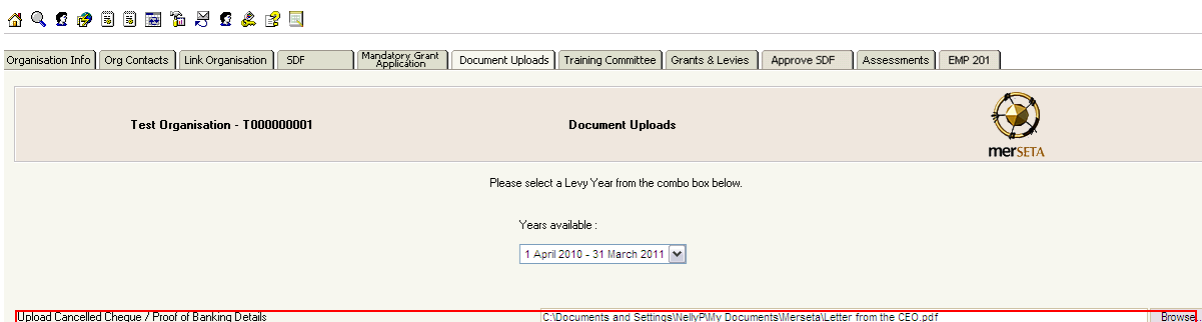
To upload a document on the form, the user will click on the browse button.



The user should then locate the specific document where the document has been saved by the user and select the file.

Once the user has selected the file, the user should click on the “Open” icon to make sure that the document saves to the browse field.

The user needs to make sure to click on the save button, for the document to be stored.



Training Committee

According to legislation when a company has more than 50 employees then there must be a training committee. You will be able to capture the details of the Training Committee Members on the screen.

Add training committee member:

Title: Designation: Fax No: *

Surname: Phone No: * E-Mail: *

First name: Cell No: *

Initials: * Optional

| # | Title | Surname | First name | Initials | Designation | Phone No | Fax No | Cell No | E-Mail | Options |
|----|-------|---------|------------|----------|-------------|-------------|--------------|--------------|-----------------|---------|
| 1. | Mr. | Jola | Tony | T | CEO | 01 334 1456 | 011 223 4455 | 088 890 7654 | mngom@hae.co.za | |

To delete a member from this list, click on the red cross. To edit information of the training committee member click on the "Edit" button



a. Grants and Levies

This screen allows the user to view the Levies the organisation has contributed to the Seta and view the grants paid back to the organisation by the Seta.

You can view the information in 2 ways.

- 1) The Levies paid on one screen and the Grants received in one statement, or,
- 2) In a Financial Statement Format with the Levies paid on the one side and the Grants received on the other side.

Organisation Info | Org Contacts | Link Organisation | SDF | Mandatory Grant Application | Document Uploads | Training Committee | **Grants & Levies** | Associate SDF | Assessments | **EMP 201**

Test Organisation - T000000001 merSETA

Financial Statement Summary Grants and Levies


Please select a Levy Year from the combo box below.

Years available:

- 1 April 2000 - 31 March 2001
- 1 April 2001 - 31 March 2002
- 1 April 2002 - 31 March 2003
- 1 April 2003 - 31 March 2004
- 1 April 2004 - 31 March 2005
- 1 April 2005 - 31 March 2006
- 1 April 2006 - 31 March 2007
- 1 April 2007 - 31 March 2008
- 1 April 2008 - 31 March 2009
- 1 April 2009 - 31 March 2010
- 1 April 2010 - 31 March 2011

To view the Levies been paid by the organisation and the Grants paid out to them, click on the "Grants & Levies" tab. The user also needs to select the financial year of the specific data needed.

On this page you can view the levies paid by the organisation and the grants received. Select the "Grants and Levies" radio button and select your year. Click on the enter button and the system will display the grants that have been paid to the organisation.













| | |
|---|---------------------|
| Test Organisation 1 April 2010 - 31 March 2011 Grant Statement | |
|  | SDL No : T000000001 |
| Phone: Fax: | |
| Sort by: <input type="radio"/> Date <input checked="" type="radio"/> Grant type | |

Associate SDF

This form is used by the SDF to change the status of the secondary SDF linked to their company to allow them to have access to the WSP/ATR information.

Please note that the Secondary SDF only has view access they cannot change any information on the WSP/ATR report.

The SDF cannot change their own status as they do not have the right to do so. Only the merSETA administrators (SDA) can accept or reject a SDF.

|  | | Approve a Skills Development Facilitator for Test Organisation - T000000001. | |  | | | | |
|---|--|--|---------------------------|---|---|--------------------------------------|--------|--|
| Register a new Secondary SDF | | | | | | | | |
| <input type="button" value="Enter"/> | | | | | | | | |
| Skills Development Facilitator | Contact Number | SDF Status | E-Mail | Date of Registration | Link Status | SDF Role | Letter | Registration Form |
| Admin, Admin |  0115551234  | Accepted | asujee@dtss.co.za | 12/17/2009 4:06:45 PM | Rejected <input type="button" value="v"/> | SDF <input type="button" value="v"/> | | <input data-bbox="1337 1317 1361 1350" type="button" value="..."/> |
| joseph, luzette |  0115515381  | Accepted | ljoseph@merseta.org.za | 3/4/2010 9:32:13 AM | Rejected <input type="button" value="v"/> | SDF <input type="button" value="v"/> | | <input data-bbox="1337 1350 1361 1384" type="button" value="..."/> |
| Ramulongo, luni |  0115515292  | Accepted | lramulongo@merseta.org.za | 3/4/2010 9:35:18 AM | Rejected <input type="button" value="v"/> | SDF <input type="button" value="v"/> | | <input data-bbox="1337 1384 1361 1417" type="button" value="..."/> |
| KLUE, KAREN |  0115515200  | Accepted | kkhue@merseta.org.za | 3/4/2010 9:35:52 AM | Rejected <input type="button" value="v"/> | SDF <input type="button" value="v"/> | | <input data-bbox="1337 1417 1361 1451" type="button" value="..."/> |
| makaba, peter |  0115515434  | Accepted | pmakaba@merseta.org.za | 3/4/2010 9:42:44 AM | Rejected <input type="button" value="v"/> | SDF <input type="button" value="v"/> | | <input data-bbox="1337 1451 1361 1485" type="button" value="..."/> |

EMP 201

Proof of payments made to SARS can be captured on this form and also attachments of the invoices or documents as proof of payments need to be uploaded under the EMP 201 tab as reflected above.

