



## **MIS IMPLEMENTATION**



# **SKILLS MODULE TRAINING GUIDE** **Medium and Large Organisations**

***Version 2.0***

## I Document Review

The document described herein is agreed to by key team members and by signing this document;

The project members confirm their support of the Training guide content.

Name	Title	Signature	Date
Tshembani Maluleka	IT Manager		
Adeline Singh	Skills Manager		28/01/2022
London Malinga	Skills Specialist		28/01/2022
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Malindi Madumo	Change Manager		

## Version Control

Date	Version	Summary of changes	Amended by
03 December 2021	1.0	Draft	Malindi Madumo
19 January 2021	2.0	Added section 5: Updating Existing Organisation details	Malindi Madumo

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## 2 Introduction

This is a Training manual for the new MIS System for the Insurance Sector Education and Training Authority (INSETA). The system provides the organisation with an easy and timeous process to process registrations and WSP and ATR submissions.

### 2.1 Objective

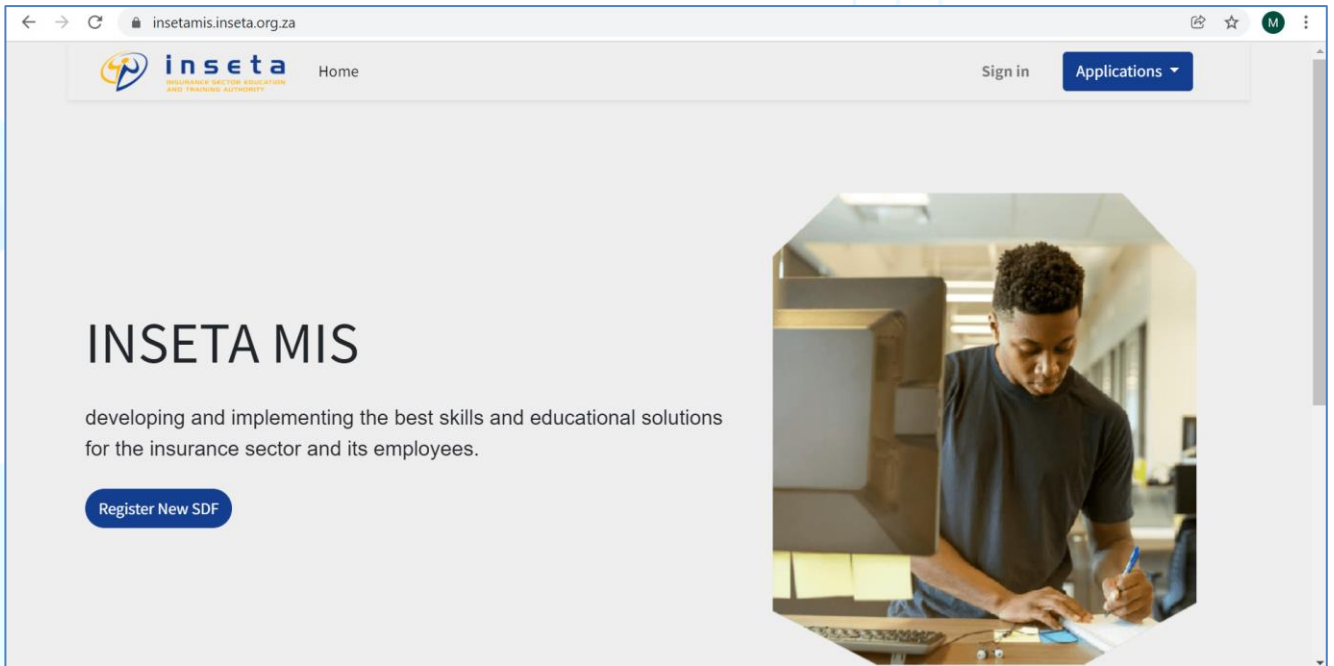
The objective of this training manual is to provide a step-by-step guide on how to execute the following processes on the system:

- Register SDF
- Register Non-Levy Organization
- Update Employer Details
- Submit WSP and ATR

### 3 Navigation



#### 3.1 System Access

To access the MIS Skills Module, follow the link <https://insetamis.inseta.org.za/>



#### 3.2 Icons and terminology

The following are icons used on the manual and their meaning

Icon	Meaning
	This icon alerts the user to take note of the important message
	This icon displays information the result that come about when a process is completed

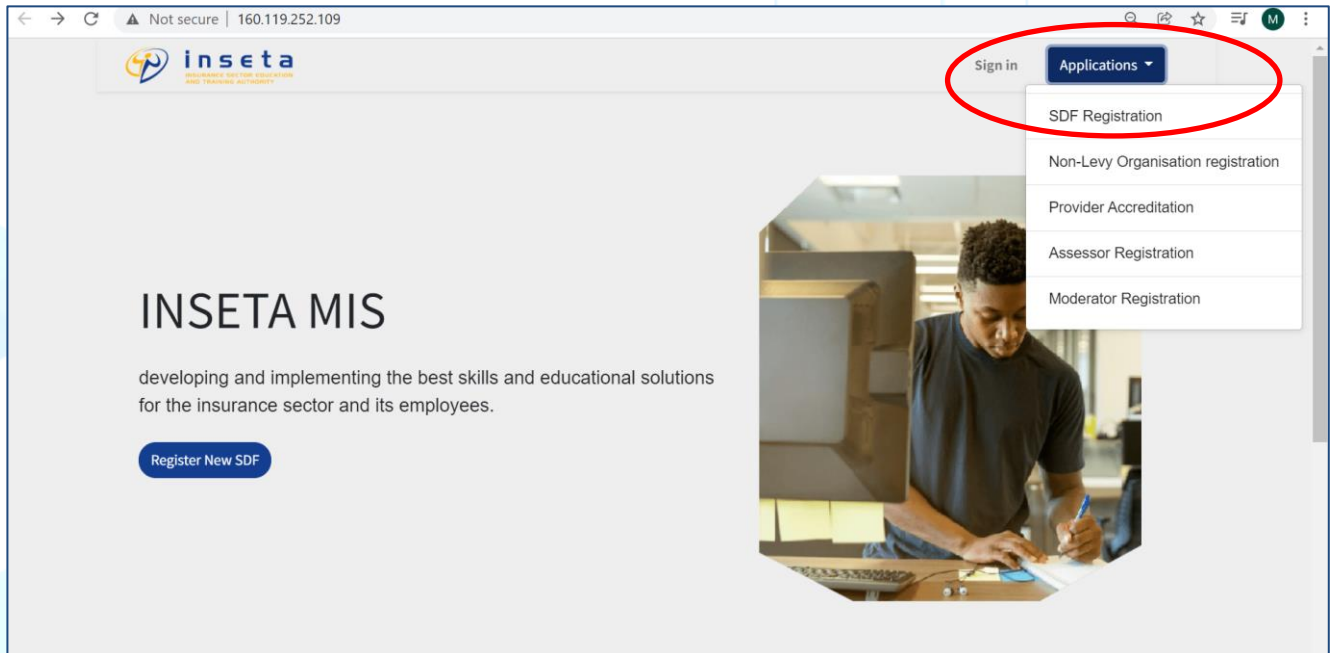
The following table includes abbreviations or notations that are used in the document and on the system.

Term/Acronym	Definition
WSP	Workplace Skills Plan
SDF	Skills Development Facilitator
ATR	Annual Training Reports
SDL	Skills Development Levy
MIS	Management Information system
DHET	Department of Higher Education and Training

## 4 SDF Registration

This section provides a guide on how to register as a SDF on the system.

### 4.1 STEP I- SDF Registration



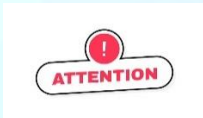
- 🖱 On the INSETA MIS landing page, Click on **Applications** to expand dropdown menu
- 🖱 Then, click on **SDF Registration**

The SDF Registration form is displayed



## 4.2 STEP 2- Capture General Information

- 🔒 Capture the SDL number and click **Add**. The system allows to add multiple employers
- 🔒 Upload appointment letter
- 🔒 Then, capture all the required general information and click **Next Step**



**Please note that the fields marked with an asterisk (\*) are mandatory and should be completed**

### 4.3 STEP 3- Complete Physical Address

- Capture Physical Address details
- Click on the **Use Physical Address for Postal Address** check box if applicable for the next step

### 4.4 STEP 4- Complete Postal Address

- Capture Postal Address details and then click **Next Step**

## 4.5 STEP 5- Capture Other Info

### SDF Registration

Fill all form field to go to next step

General Information
Physical Address
Postal Address
Other Info.
Finish

#### Other Info.

##### Citizenship Information

Alternate ID Type Equity \*

✔

Citizen Residential Status \* Nationality Home Language

✔  seSotho

R.S.A Identification No \* Date of Birth \* Gender \*

✔  ✔  ✔

##### Status

Socio Economic Status \* Disability Status \*

✔  ✔

Highest Education \* Highest Education Description

✔

Current Occupation \* Years In Occupation \*

✔  ✔

Experience \*

✔

### 🖱️ Capture Other information

Sign in
Applications ▾

General Comments

Have you completed a SDF Training Programme provided by an accredited training provider?

Name of Accredited Training Provider

✔

I do not have an SDF Certificate and would like to attend an INSETA funded SDF Training?

✔

Registration Date

SDF Certificate: Select upload

No file chosen

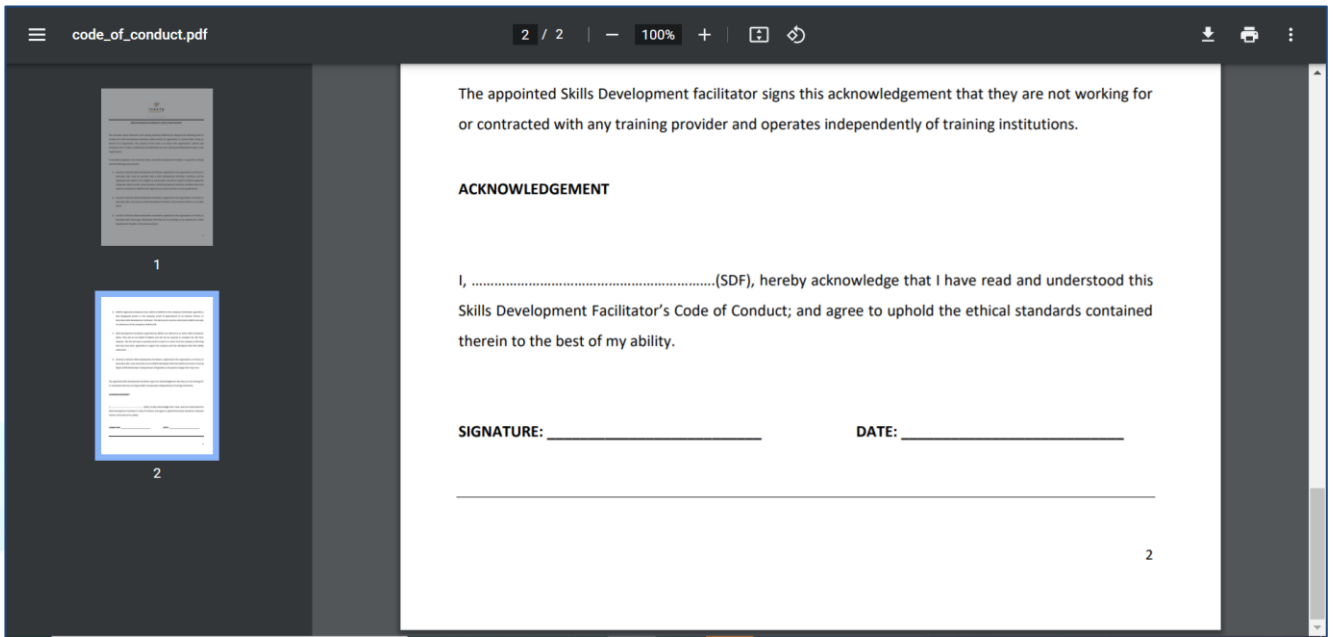
Download [Here](#) Sign and Upload the Code Of Conduct \*

No file chosen

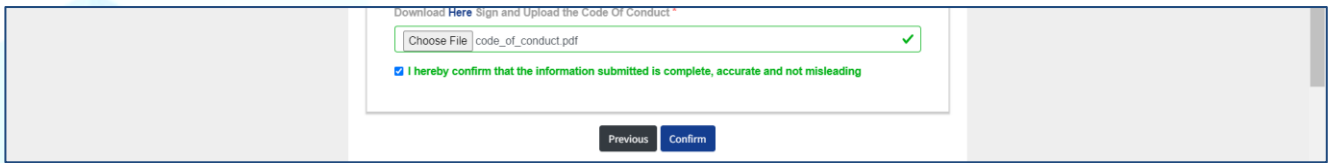
I hereby confirm that the information submitted is complete, accurate and not misleading

Previous
Confirm

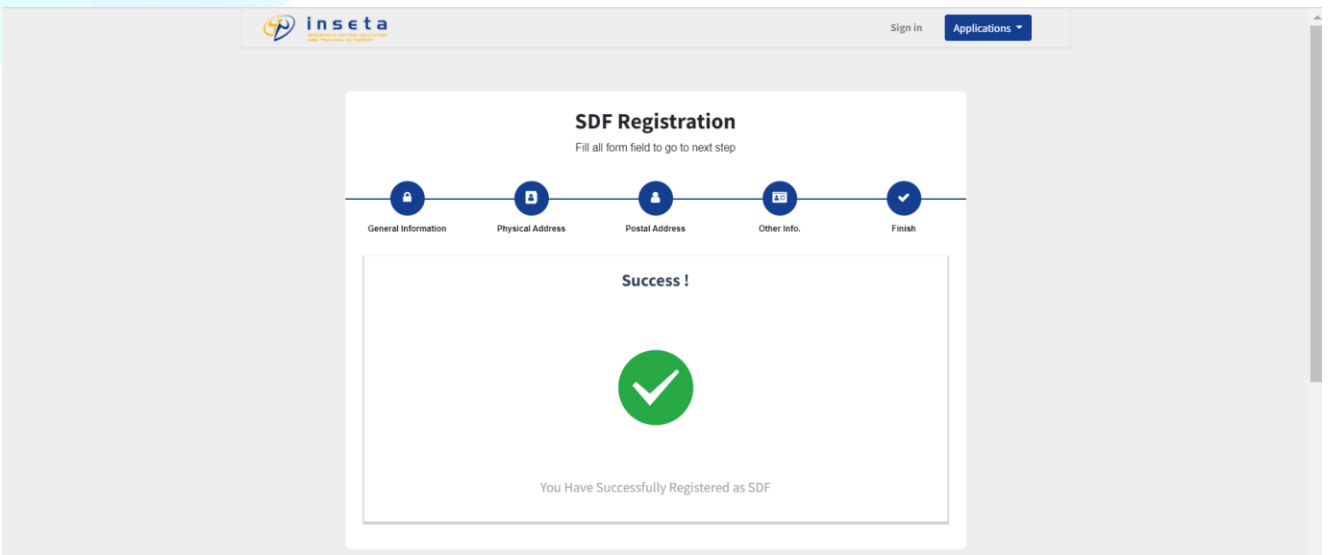
### 🖱️ Click on **Here** to download and sign the Code of Conduct



 Sign the Code of Conduct



-  Upload the signed Code of Conduct
-  Click on the declaration checkbox **I hereby confirm that the information is complete, accurate and not misleading**
-  Click **Confirm**





***You have successfully registered as SDF on the system. An email will then be sent to the Skills Specialist and Manger for verification and approval.***

***Once application is finalised, the SDF will receive email with system Login details***

---

## 5 Update existing Organisation details

### 5.1 Updating Organisation Details

Sdl No	Registration No	Trade Name	Legal Name	Phone	Fax Number	Email	Organisation Size	Levy Status	Created on	Stage
XD000testingAnnie	xxxx	Test07Feb2020	Test07Feb2020	00000			Small Non-Levy Paying (1 - 49)		11/10/2021 10:36:43	Approved
L000000000000	99/1234567/06	TestCompany	test	011 544 2000		skills@inseta.org.za	Medium (50 - 149)	Levy Paying	11/10/2021 10:36:43	Approved
N000000015	200/022115/07	Test - Providence Consultants & Actuaries	Providence Consultants & Actuaries	0413954400		skills@inseta.org.za	Small Non-Levy Paying (1 - 49)	Non-Levy Paying	11/10/2021 10:36:43	Approved

Search and click on the organisation

**TestCompany**

<b>Organisation Details</b>	<b>Trade Name</b>	TestCompany	<b>Levy Status</b>	Levy Paying
<b>Child Organisations</b>	<b>Legal Name</b>	test	<b>Phone</b>	011 544 2000
<b>Contact Person</b>	<b>BEE Status</b>	Exempted	<b>Fax Number</b>	
<b>Training Committee</b>	<b>Physical Address</b>		<b>Email</b>	skills@inseta.org.za
<b>CFO</b>	<b>Country</b>	South Africa	<b>Registration No. Type</b>	Company Registration Number
<b>CEO</b>	<b>Street</b>	37 Empire road	<b>Registration No</b>	99/1234567/06
<b>Banking Details</b>	<b>Street2</b>	Parktown	<b>Core Business</b>	Yes
<b>WSP Submissions</b>	<b>Physical Address 3</b>	2193	<b>Will submit WSP - ATR?</b>	Yes
<b>Client Relationship Management</b>	<b>Physical Code</b>	Westcliffe	<b>Is Unionized?</b>	Yes
<b>Grants &amp; Levies</b>	<b>Physical Suburb</b>	Johannesburg	<b>Number of Employees</b>	84
	<b>Physical City</b>	Gasteng (ZA)	<b>Number of Employees (Current FY)</b>	1
	<b>Physical Province</b>	Urban	<b>Organisation Size</b>	Medium (50 - 149)
	<b>Physical Urban/Rural</b>	Johannesburg Metro	<b>SIC Code</b>	[82110] Life Insurance
	<b>Physical Municipality</b>		<b>SIC Code Description</b>	Life Insurance
	<b>Use Physical for Postal?</b>	<input checked="" type="checkbox"/>	<b>FSP License</b>	0000
	<b>Postal Address</b>		<b>Other Sector</b>	None

Click **Edit** to enable editing Organisation details

Organisations / [L000000000000] TestCompany

Save Discard 2 / 3 < >

### TestCompany

Organisation Details	Trade Name	TestCompany	Levy Status	Levy Paying
Child Organisations	Legal Name	test	Phone	011 544 2000
Contact Person	BEE Status	Exempted	Fax Number	
Training Committee	<b>Physical Address</b>		Email	skills@inseta.org.za
CFO	Country	South Africa	Registration No. Type	Company Registration Number
CEO	Street	37 Empire road	Registration No	99/1234567/06
Banking Details	Street2	Parktown	Core Business	
WSP Submissions	Physical Address 3	Physical Address Line 3	Will submit WSP - ATR?	Yes
Client Relationship Management	Physical Code	2193	Is Unionized?	Yes
Grants & Levies	Physical Suburb	Westcliffe	Number of Employees	84
	Physical City	Johannesburg	Number of Employees (Current FY)	1
	Physical Province	Gauteng (ZA)	Organisation Size	Medium (50 - 149)
	Physical Urban/Rural	Urban	SIC Code	[82110] Life Insurance
	Physical Municipality	Johannesburg Metro	SIC Code Description	Life Insurance
	Use Physical for Postal?	<input checked="" type="checkbox"/>	FSP License	0000
	<b>Postal Address</b>		Other Sector	None
	Postal Address 1	37 Empire road		
	Postal Address 2	Parktown		

- 🖱️ Capture changes and confirm details
- 🖱️ Click **Save**



*The Organisation details are successfully updated.*

## 5.2 Verify linked child companies.

Skills SDF Dashboard Organisation WSP/ATR Test Test2

Organisations / [L000000000000] TestCompany

Save Discard 2 / 3 < >

Print Approval Letter Draft Pending Approval Approved Rejected

1 WSP/ATR Sub... 0 DG Applications




L000000000000  
TestCompany



Legal Name	Trade Name	Sdl No	Link Start Date	Link End Date	File Name	State

- 🖱️ Navigate and click on **Child Organisations** tab
- 🖱️ Verify by checking the listed organisations
- 🖱️ Click **Save**

## 5.3 Update Organisation Contacts

Title	Name	Job Position	Email	Mobile
Hon	Bonginkosi Malinga	Sales Director	me@inseta.org.za	0113818900
Mr	DevTest DevTest	1	matthew@crimzone.com	1

-  Click on **Contact Persons** tab
-  Click **Edit** to enable editing
-  Click on the Contact line item

-  Capture changes and confirm details
-  Click **Save**

Title	Name	Job Position	Email	Mobile
Hon	Bonginkosi Malinga	Sales Director	me@inseta.org.za	0113818900
Mr	DevTest DevTest	1	matthew@crimzone.com	1



☞ To add a contact, click **Add a line**

☞ Capture required details and then click **Save & Close**

## 5.4 Update Training Committee

Title	First Name	Last Name	Initials	SDF Role	Designation	Designation Description
Hon	Bonginkosi	Malinga	B	Primary SDF	CEO	CEO
Miss	Adeline	Singh	A	Other	HR Manager	Skills Manager

[Add a line](#)

I hereby confirm that the following information submitted is complete, accurate and not misleading

☞ Click on the **Training Committee** tab

☞ Click on the Training Committee line item to verify or update

**Open: Training Committee**

Title: Hon | SDF Role: Primary SDF

First Name: Bonginkosi | Designation: CEO

Last Name: Malinga | Designation Description: CEO

Initials: B | Name Of Union: None

Phone Number: 0113818900 | Position In Union:

Fax Number:

Cell Number: 0113818900

Email: malingab@inseta.org.za

Buttons: Save, Discard

🖱️ Update Information and click **Save**

**TestCompany**

Title	First Name	Last Name	Initials	SDF Role	Designation	Designation Description
Hon	Bonginkosi	Malinga	B	Primary SDF	CEO	CEO
Miss	Adeline	Singh	A	Other	HR Manager	Skills Manager

[Add a line](#)

I hereby confirm that the following information submitted is complete, accurate and not misleading

🖱️ Click **Add a line** to add a Training Committee member

**Create Training Committee**

Title: | SDF Role: |

First Name: | Designation: |

Last Name: | Designation Description: |

Initials: | Name Of Union: |

Phone Number: | Position In Union: |

Fax Number: |

Cell Number: |

Email: |

Buttons: Save & Close, Save & New, Discard

🖱️ Capture required details and click **Save**

## 5.5 Update CFO details

Organisations / [L000000000000] TestCompany

Save Discard

Print Approval Letter

2 / 3 < >

Draft Pending Approval Approved Rejected

1 WSP/IATR Sub... 0 DG Applications

L000000000000  
TestCompany

Title	First Name	Last Name	Email	Cell Number	Fax Number	Email
Mr	Martin	Kolele	martink@inseta.org.za	0113818900	0113818900	martink@inseta.org.za

Add a line

I hereby confirm that the following information submitted is complete, accurate and not misleading

- Click on **CFO** tab
- Click **Edit** to enable editing
- Click on the Contact line item

Skills SDF Dashboard Organisation

Organisations / [L000000000000] TestCompany

Save Discard

Print Approval Letter

L000000000000  
TestCompany

Organisation Details

Child Organisations

Add a line

Open: CFO

Title: Mr

First Name: Martin

Surname: Kolele

Initials: M

Designation: CFO

Phone number: 0113818900

Fax number: 0113818900

Cell Number: 0113818900

Email: martink@inseta.org.za

Save Discard

2 / 3 < >

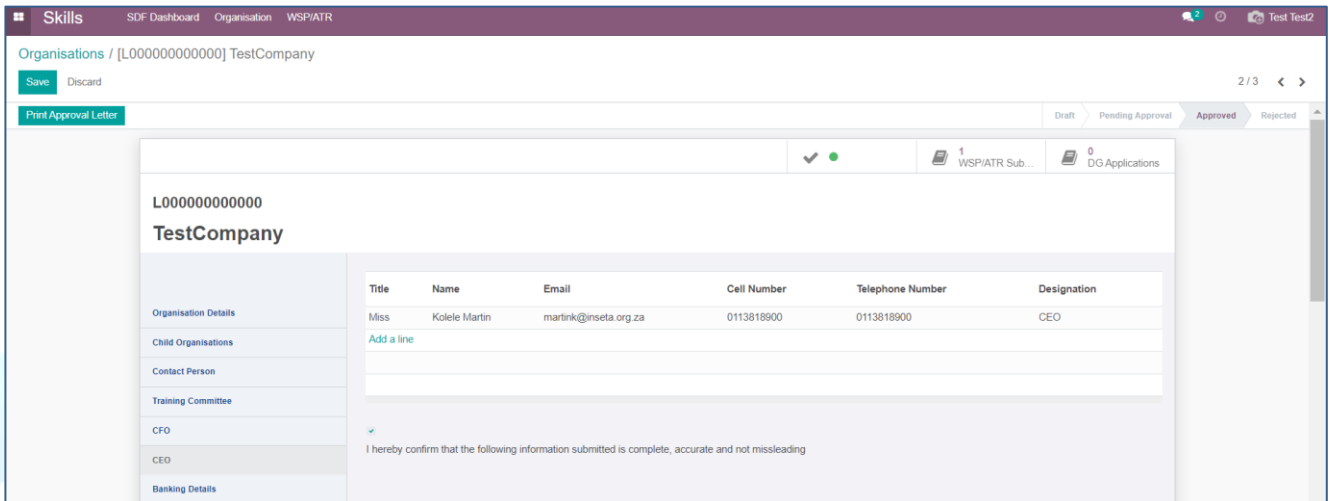
Draft Pending Approval Approved Rejected

0 DG Applications

inseta.org.za

- Change or confirm details
- Click **Save**

## 5.6 Update CEO details



Skills SDF Dashboard Organisation WSP/ATR Test Test2

Organisations / [L000000000000] TestCompany

Save Discard 2 / 3 < >

Print Approval Letter Draft Pending Approval Approved Rejected

1 WSP/ATR Sub... 0 DG Applications

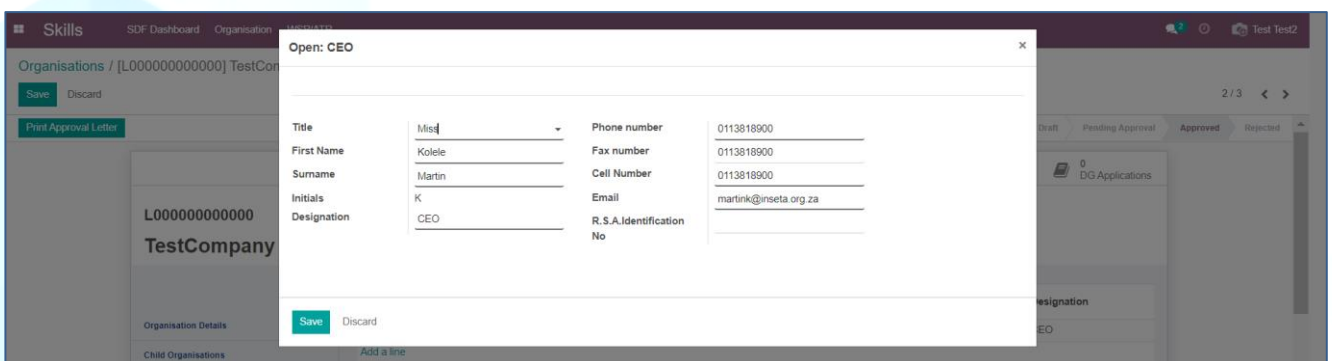
L000000000000  
TestCompany

Title	Name	Email	Cell Number	Telephone Number	Designation
Miss	Kolele Martin	martink@inseta.org.za	0113818900	0113818900	CEO

Add a line

I hereby confirm that the following information submitted is complete, accurate and not misleading

- 🖱️ Click on **CEO** tab
- 🖱️ Click **Edit** to enable editing
- 🖱️ Click on the Contact line item



Skills SDF Dashboard Organisation WSP/ATR Test Test2

Organisations / [L000000000000] TestCompany

Save Discard 2 / 3 < >

Print Approval Letter Draft Pending Approval Approved Rejected

0 DG Applications

Open: CEO

Title Miss Phone number 0113818900

First Name Kolele Fax number 0113818900

Surname Martin Cell Number 0113818900

Initials K Email martink@inseta.org.za

Designation CEO R.S.A. Identification No

Save Discard

Add a line

- 🖱️ Change or confirm details
- 🖱️ Click **Save**

## 5.7 Update Organisation's Banking details

Organisations / [L000000000000] TestCompany

Save Discard 2 / 3 < >

Print Approval Letter Draft Pending Approval Approved Rejected

1 WSP/ATR Sub... 0 DG Applications

L000000000000  
TestCompany

Bank Name	Account Type	Accountnumber	Branch Name	Branch Code	Verification Status
Standard Bank	Transmission	0000000000	Johannesburg south	2022	Not Verified
Add a line					

I hereby confirm that the following information submitted is complete, accurate and not misleading

- Click on **Banking details** tab
- Click on the banking details line item

Skills SOF Dashboard Organisation Administration Test Test2

Organisations / [L000000000000] TestCompany

Save Discard 2 / 3 < >

Print Approval Letter Draft Pending Approval Approved Rejected

0 DG Applications

Open: Bank Details

Accountnumber: 0000000000 Bank: Standard Bank

Account Type: Transmission Branch Name: Johannesburg south

Account Holder: TestCompany Branch Code: 2022

Verification Status: Not Verified

Last Updated by: Test Test2

Last Updated on: 01/19/2022 10:57:15

Save Discard

- Update Banking information
- Click **Save**

## 6 WSP ATR Submission

This section provides a guide on WSP & ATR submissions on the system for medium and large organisations. This form requires employers to report on all training interventions that took place in their company in the previous financial year. The employer must report both credit and non-credit bearing interventions

### 6.1 STEP I- System Login

🖱️ Login as SDF once application is approved

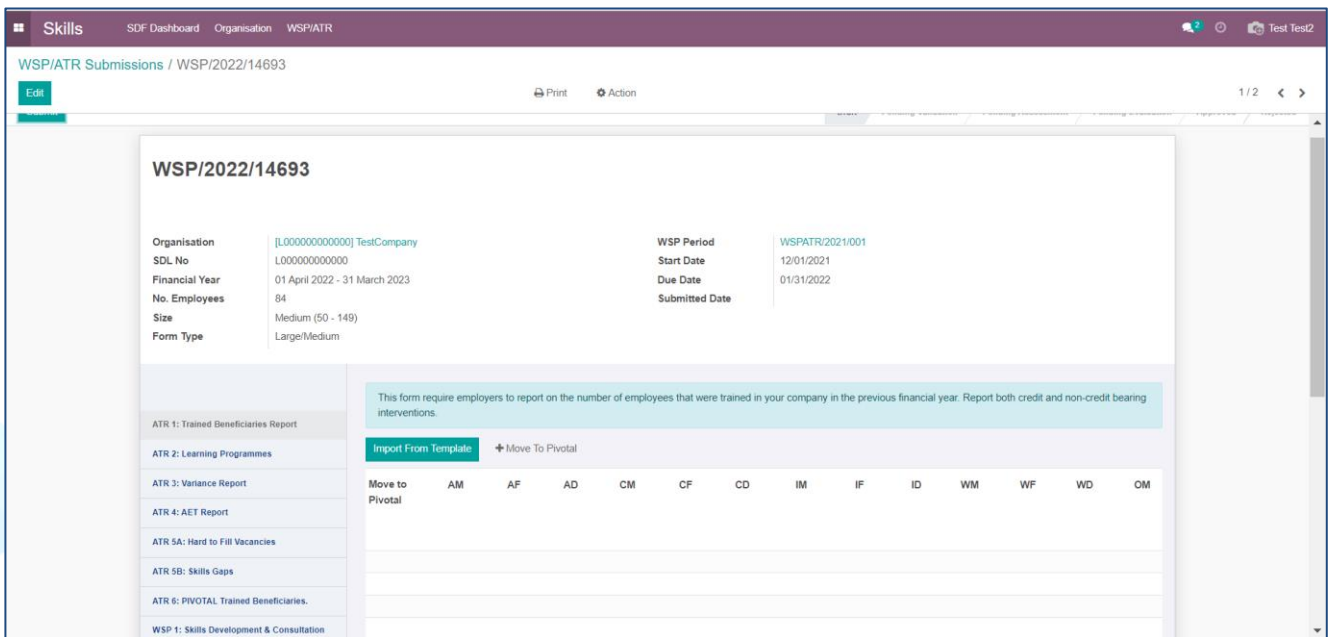
### 6.2 STEP I- Create WSP

🖱️ Click on the menu icon , then click on **Skills**

Reference Number	Organisation	SDL No	Form Type	Financial Year	WSP Period	Due Date	Submitted Date	Approved Date	Rejected Date	Created on	Created by	State
WSP/2022/146...	[L000000000000] TestCompany	L0000000000...	Large/Medium	01 April 2022 - 31 March 2023	WSP/ATR/2021/0...	01/31/2022				01/19/2022 10:59:08	Test Test2	Draft
WSP/2021/146...	[N0000000015] Test - Providenc...	N000000015	Small Firms	01 April 2022 - 31 March 2023	WSP/ATR/2021/0...	01/31/2022	12/07/2021 02:00:00			12/07/2021 14:01:45	Test Test2	Pending Validation

🖱️ Click **WSP/ ATR** and then **WSP/ATR Submission**

🖱️ Click **Create**



**WSP/2022/14693**

Organisation: [000000000000] TestCompany  
 SDL No: L000000000000  
 Financial Year: 01 April 2022 - 31 March 2023  
 No. Employees: 84  
 Size: Medium (50 - 149)  
 Form Type: Large/Medium

WSP Period: WSPATR/2021/001  
 Start Date: 12/01/2021  
 Due Date: 01/31/2022  
 Submitted Date:

ATR 1: Trained Beneficiaries Report  
 ATR 2: Learning Programmes  
 ATR 3: Variance Report  
 ATR 4: AET Report  
 ATR 5A: Hard to Fill Vacancies  
 ATR 5B: Skills Gaps  
 ATR 6: PIVOTAL Trained Beneficiaries  
 WSP 1: Skills Development & Consultation

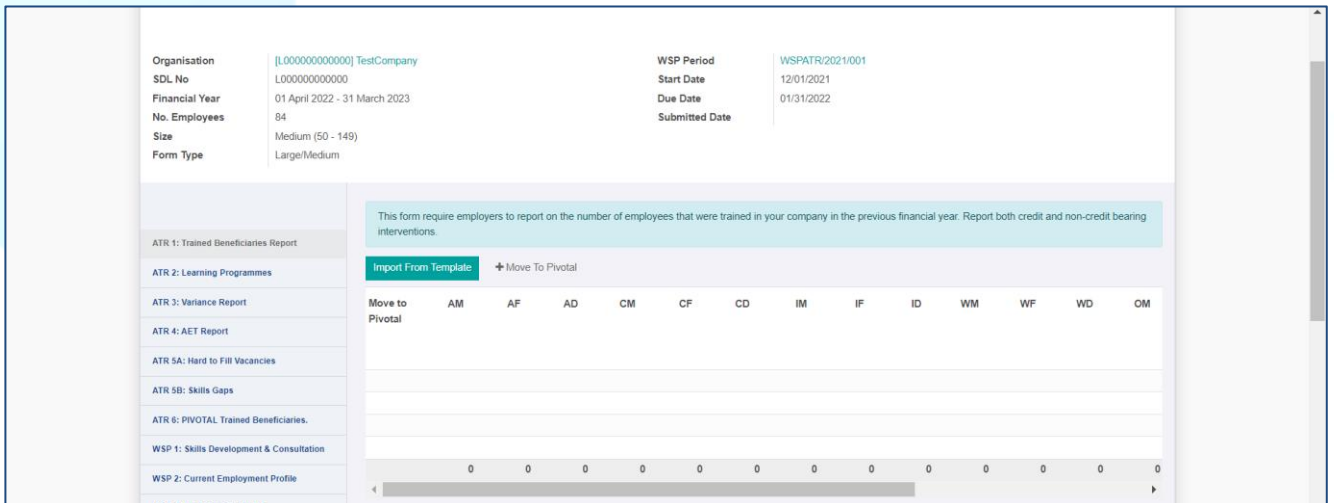
This form require employers to report on the number of employees that were trained in your company in the previous financial year. Report both credit and non-credit bearing interventions.

Import From Template + Move To Pivotal

Move to Pivotal	AM	AF	AD	CM	CF	CD	IM	IF	ID	WM	WF	WD	OM

- ☞ Select employer on the organisation dropdown
- ☞ Select Financial year
- ☞ The system auto populates other information

### 6.3 STEP 2- Trained Beneficiaries Report



Organisation: [000000000000] TestCompany  
 SDL No: L000000000000  
 Financial Year: 01 April 2022 - 31 March 2023  
 No. Employees: 84  
 Size: Medium (50 - 149)  
 Form Type: Large/Medium

WSP Period: WSPATR/2021/001  
 Start Date: 12/01/2021  
 Due Date: 01/31/2022  
 Submitted Date:

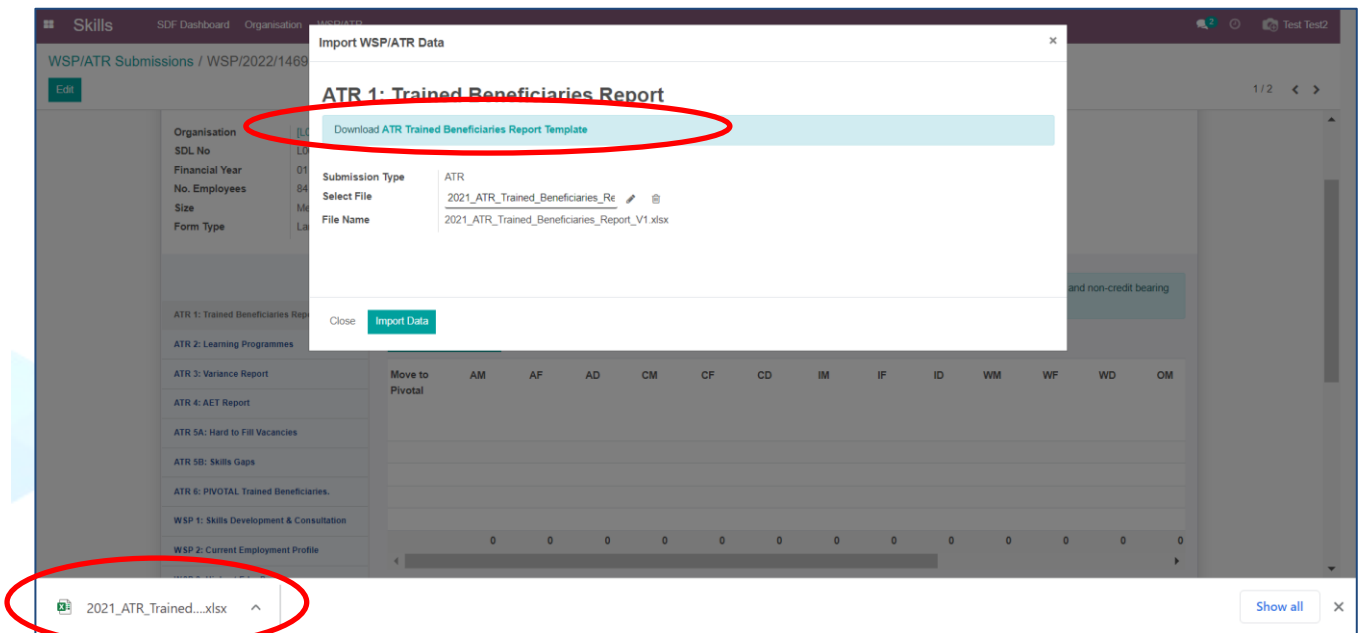
ATR 1: Trained Beneficiaries Report  
 ATR 2: Learning Programmes  
 ATR 3: Variance Report  
 ATR 4: AET Report  
 ATR 5A: Hard to Fill Vacancies  
 ATR 5B: Skills Gaps  
 ATR 6: PIVOTAL Trained Beneficiaries  
 WSP 1: Skills Development & Consultation  
 WSP 2: Current Employment Profile

This form require employers to report on the number of employees that were trained in your company in the previous financial year. Report both credit and non-credit bearing interventions.

Import From Template + Move To Pivotal

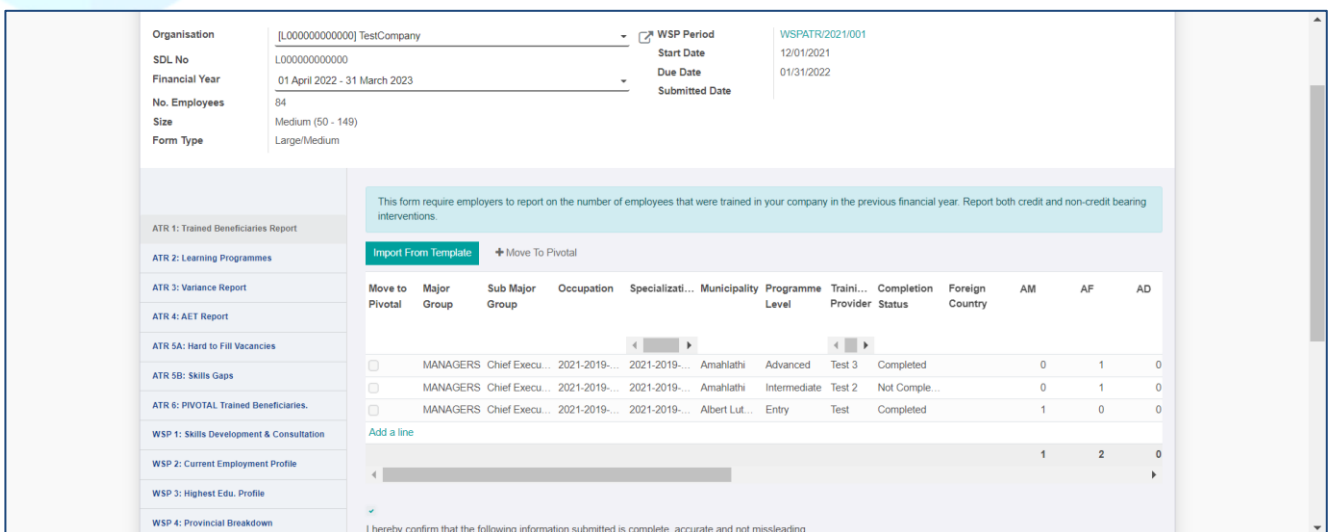
Move to Pivotal	AM	AF	AD	CM	CF	CD	IM	IF	ID	WM	WF	WD	OM
	0	0	0	0	0	0	0	0	0	0	0	0	0

- ☞ Click on **Trained Beneficiaries Report**
- ☞ Click **Import from Template**



- 🖱️ Click **Download ATR Trained Beneficiaries Template**
- 🖱️ On the pop-up screen, Click **Download ATR Trained Beneficiaries Template**
- 🖱️ The file is downloaded on the local machine
- 🖱️ Click on **Upload file** then browse your machine and select the saved file
- 🖱️ Click **Import Data**

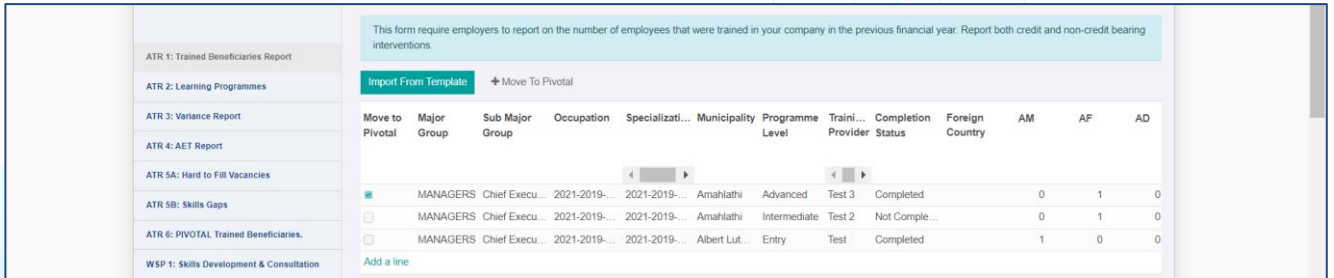
The Data is imported and populates on the system as shown below







**Always remember to tick the declaration checkbox "I Hereby confirm that the following information submitted is complete, accurate and not misleading"**



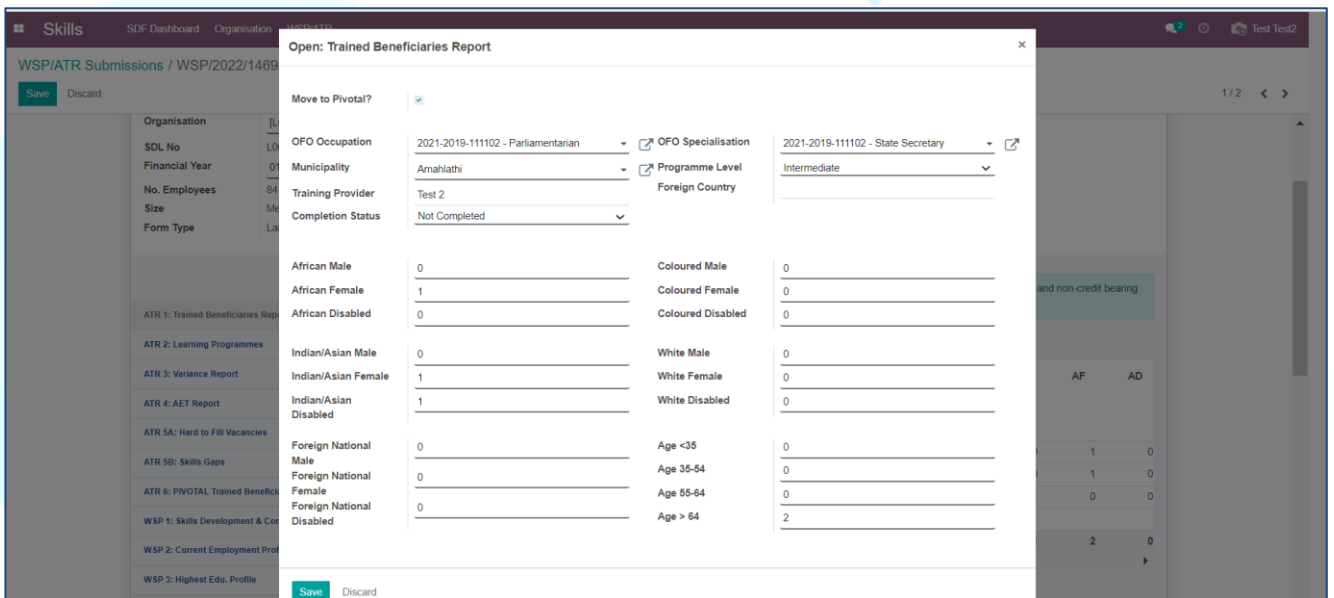
This form requires employers to report on the number of employees that were trained in your company in the previous financial year. Report both credit and non-credit bearing interventions.

Import From Template + Move To Pivotal

Move to Pivotal	Major Group	Sub Major Group	Occupation	Specialization	Municipality	Programme Level	Training Provider	Completion Status	Foreign Country	AM	AF	AD
<input checked="" type="checkbox"/>	MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Amahlathi	Advanced	Test 3	Completed		0	1	0
<input type="checkbox"/>	MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Amahlathi	Intermediate	Test 2	Not Comple...		0	1	0
<input type="checkbox"/>	MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Albert Lut...	Entry	Test	Completed		1	0	0

Add a line

Select line item to copy data to Pivotal trained beneficiaries



Open: Trained Beneficiaries Report

Move to Pivotal?

OFO Occupation: 2021-2019-11102 - Parliamentarian

Municipality: Amahlathi

Training Provider: Test 2

Completion Status: Not Completed

OFO Specialisation: 2021-2019-11102 - State Secretary

Programme Level: Intermediate

Foreign Country: [Empty]

African Male: 0

African Female: 1

African Disabled: 0

Indian/Asian Male: 0

Indian/Asian Female: 1

Indian/Asian Disabled: 1

Foreign National Male: 0

Foreign National Female: 0

Foreign National Disabled: 0

Coloured Male: 0

Coloured Female: 0

Coloured Disabled: 0

White Male: 0

White Female: 0

White Disabled: 0

Age <35: 0

Age 35-54: 0

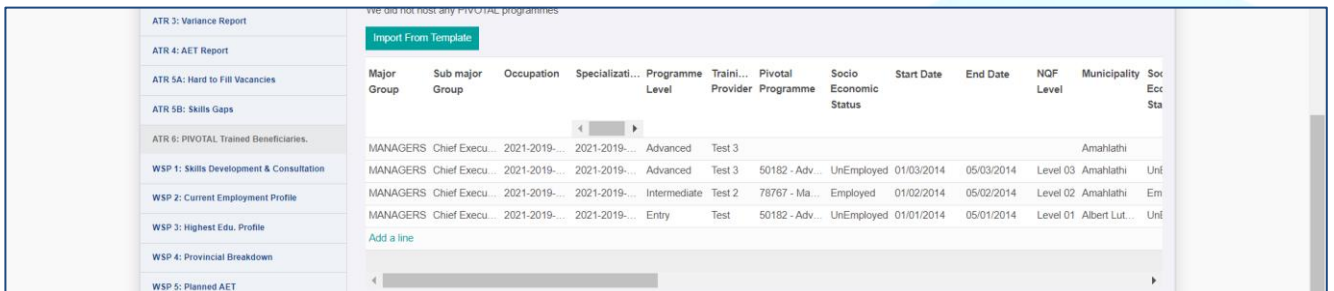
Age 55-64: 0

Age > 64: 2

Save Discard

Check the Move to Pivotal tick-box

Click **Save**



We did not find any PIVOTAL programmes

Import From Template

Major Group	Sub major Group	Occupation	Specialization	Programme Level	Training Provider	Pivotal Programme	Socio Economic Status	Start Date	End Date	NQF Level	Municipality	Soc Ecc Sta
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Advanced	Test 3						Amahlathi	
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Advanced	Test 3	50182 - Adv...	UnEmployed	01/03/2014	05/03/2014	Level 03	Amahlathi	Unf
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Intermediate	Test 2	78767 - Ma...	Employed	01/02/2014	05/02/2014	Level 02	Amahlathi	Em
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Entry	Test	50182 - Adv...	UnEmployed	01/01/2014	05/01/2014	Level 01	Albert Lut...	Unf

Add a line

The data is successfully moved to Pivotal Trained Beneficiaries

## 6.4 STEP 3- Learning Programmes

- 🖱️ Click **Download ATR Learning Programmes Template**
- 🖱️ On the pop-up screen, Click **Download ATR Learning Programmes Template**
- 🖱️ The file is downloaded on the local machine
- 🖱️ Click on **Upload file** then browse your machine and select the saved file
- 🖱️ Click **Import Data**

The Data is imported and populates on the system as shown below

Occupational Group	Learning Programme	Which scarce and critical occupation is the training linked to?	Inseta Funding	Other Funding	Company Funding	Training Provider	Credit Bearing	NQF Level	No Of Employees
Professionals	.NET Programmin...		10000.12	10000.12	10000.12		Credit-Bearing	Level 05	5
Technicians and Ass...	Reinsurance	2019-212101 - Actuary	15000.55	15000.55	15000.55		Non Credit-Bear...	Level 02	4
Managers	Insurance 101	2019-332101 - Insur...	10000.00	10000.00	10000.00		Credit-Bearing	Level 01	23
Add a line									
			35000.67	35000.67	35000.67				32

I hereby confirm that the following information submitted is complete, accurate and not misleading

- 🖱️ Check on the declaration tick-box

## 6.5 STEP 4- Variance Report

This form compare the planned beneficiaries plan for the previous year's submission against the trained beneficiaries report for the current year's submission. Employers are only required to state reasons provided they have trained less than what was planned for.

- A Negative variance means that **planned beneficiaries is greater than trained beneficiaries**
- A positive Variance means that **planned beneficiaries is less than trained beneficiaries**

Major Occupation	Planned	Trained	% Variance	Reason	other Reason

I hereby confirm that the following information submitted is complete, accurate and not misleading

- 🔒 This is a view only section
- 🔒 Check on the declaration tick-box

## 6.6 STEP 5- AET Report

WSP/ATR Submissions / WSP/2022/1469

Save Discard

Import WSP/ATR Data

ATR: Trained AET

Download ATR Trained AET Template

Submission Type: ATR

Select File: 2021\_ATR\_Adult\_Education\_And\_Trai

File Name: 2021\_ATR\_Adult\_Education\_And\_Training\_V1.xlsx

Close Import Data

2021\_ATR\_Adult\_E...xlsx 2021\_ATR\_Learnin...xlsx Show all

- 🔒 Click Download **ATR Trained AET Template**
- 🔒 On the pop-up screen, Click **Download ATR Trained AET Template**
- 🔒 The file is downloaded on the local machine
- 🔒 Click on **Upload file** then browse your machine and select the saved file
- 🔒 Click **Import Data**

The Data is imported and populates on the system as shown below

WSP/ATR Submissions / WSP/2022/14693

Save Discard

1/2 < >

No. Employees: 84  
Size: Medium (50 - 149)  
Form Type: Large/Medium

ATR 1: Trained Beneficiaries Report  
ATR 2: Learning Programmes  
ATR 3: Variance Report  
ATR 4: AET Report  
ATR 5A: Hard to Fill Vacancies  
ATR 5B: Skills Gaps  
ATR 6: PIVOTAL Trained Beneficiaries.  
WSP 1: Skills Development & Consultation  
WSP 2: Current Employment Profile  
WSP 3: Highest Edu. Profile  
WSP 4: Provincial Breakdown  
WSP 5: Planned AET

This form require the employer to report on the training interventions conducted to assist employees who hold a qualification that is below NQF level 4 (Grade 12) to attain a qualification that is at NQF level 4.

Import From Template

Major Group	Sub major Group	Occupation	Specializati...	Municipal...	First Name	Surname	Id No	Population Group	Gen...	Disability Status	Aet Start Date
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...		FirstNameT...	Surnam...	890625510...	White	Female	Intellectual (...)	01/03/2014
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...		FirstNameT...	Surnam...	890625510...	Black: India...	Female	Communica...	01/01/2014

Add a line

I hereby confirm that the following information submitted is complete, accurate and not misleading

☞ Check on the declaration tick-box

## 6.7 STEP 6- Hard to fill vacancies

insetamis.inseta.org.za/web#id=14696&action=300&model=inseta.wspatr&view\_type=form&cids=&menu\_id=185

Skills SDF Dashboard Organisation

WSP/ATR Submissions / WSP/2022/14693

Save Discard

1/2 < >

Import WSP/ATR Data

ATR: Hard To Fill Vacancies

Download ATR Hard to fill vacancies

Submission Type: ATR  
Select File: 2021\_ATR\_Hard\_to\_fill\_vacancies\_...  
File Name: 2021\_ATR\_Hard\_to\_fill\_vacancies\_V1 (1).xlsx

Close Import Data

Major Group	Sub Major Group	OFO Occupation	Province	Reasons
Add a line				

I hereby confirm that the following information submitted is complete, accurate and not misleading

2021\_ATR\_Hard\_to\_...xlsx 2021\_ATR\_Adult\_E...xlsx 2021\_ATR\_Learnin...xlsx Show all

- ☞ Click **ATR Hard to fill vacancies**
- ☞ On the pop-up screen, Click **Download ATR Hard to fill vacancies**
- ☞ The file is downloaded on your machine
- ☞ Click on **Upload file** then browse your machine and select the saved file
- ☞ Click **Import Data**

The Data is imported and populates on the system as shown below

This form require employers to report on all the occupations that took your organisation longer than six (6) months to find a suitably experienced and qualified replacement.

We did not have any Hard to Fill Vacancies

**Import From Template:**

Major Group	Sub Major Group	OFO Occupation	Province	Reasons
MANAGERS	Chief Executives, Senior Officials and Legislators	2021-2019-111102 - Parliamentarian	Gauteng (ZA)	1 record
<a href="#">Add a line</a>				

I hereby confirm that the following information submitted is complete, accurate and not misleading

- 🖱️ Check on the declaration tick-box
- 🖱️ If there were no Hard to fill check the tick-box and skip last step

## 6.8 STEP 7- Skills Gap

### Scenario I

This form require employers to report all the skills that are needed by an employee to carry out job tasks competently. It is also referred to as "Top-up Skills".

We did not have any Hard to Fill Vacancies

Manager Gap 1	Manager Gap 2	Manager Gap 3	Professionals Gap 1	Professionals Gap 2	Professionals Gap 3
<a href="#">Add a line</a>					

I hereby confirm that the following information submitted is complete, accurate and not misleading

- 🖱️ Click **Skills Gap**



**If you tick the checkbox, "We did not have any Hard to fill vacancies", you not required to fill the Skills gap section. If this is not checked the system will not allow for submission.**

## Scenario 2

Major Occupation	No Gaps	List the top 3 common Skills	Identify up to maximum of 3 reasons per skills page
Manager	1	Management and Leadership	Lack of relevant qualifications
	2		
	3		
Professionals	1		
	2		
	3		
Technicians and Associate Professionals	1	Supervisory	New Technology
	2		
	3		
Clerical Support	1		
	2		
	3		
Service and Sales Workers	1		
	2		
	3		

- Untick the Checkbox
- Click on **Add a line** to edit data
- Capture Skills Gap
- Click **Save & Close**

The Data is Captured and populates on the system as shown below

This form require employers to report all the skills that are needed by an employee to carry out job tasks competently. It is also referred to as "Top-up Skills".

We did not have any Hard to Fill Vacancies

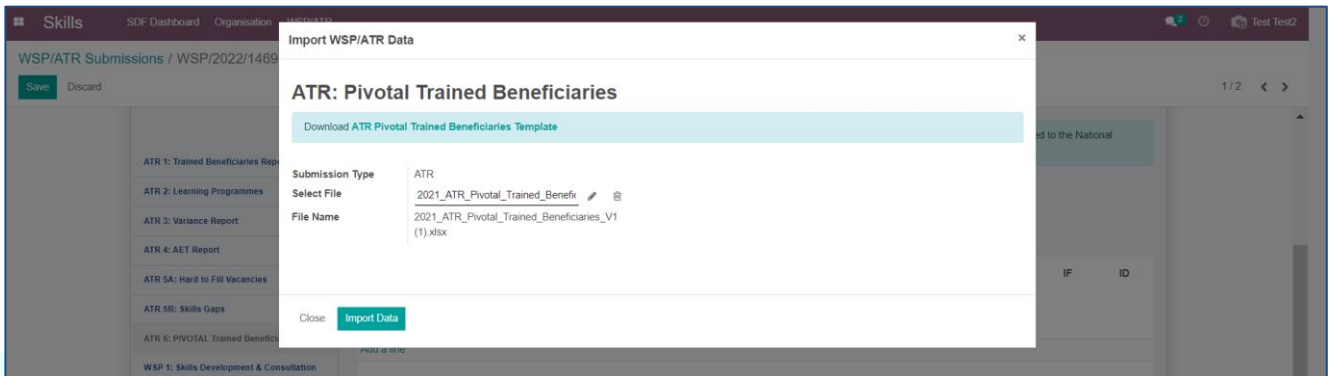
Manager Gap 1	Manager Gap 2	Manager Gap 3	Professionals Gap 1	Professionals Gap 2	Professionals Gap 3
Management and Leade...					

[Add a line](#)

I hereby confirm that the following information submitted is complete, accurate and not misleading

- Check on the declaration tick-box

## 6.9 STEP 8- Pivotal Trained Beneficiaries



- ☞ Click **ATR Pivotal Trained beneficiaries Template**
- ☞ On the pop-up screen, Click **Download ATR Pivotal Trained beneficiaries Template**
- ☞ The file is downloaded on your machine
- ☞ Click on **Upload file** then browse your machine and select the saved file
- ☞ Click **Import Data**

The Data is imported and populates on the system as shown below

Major Group	Sub major Group	Occupation	Specializati...	Programme Level	Traini... Provider	Pivotal Programme	Socio Economic Status	Start Date	End Date	NQF Level	Municipality	Soc Ecc Sta
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Advanced	Test 3	50182 - Adv...	UnEmployed	01/03/2014	05/03/2014	Level 03	Amahlaithi	Unt
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Intermediate	Test 2	78767 - Ma ...	Employed	01/02/2014	05/02/2014	Level 02	Amahlaithi	Em
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Entry	Test	50182 - Adv...	UnEmployed	01/01/2014	05/01/2014	Level 01	Albert Lut...	Unt

Add a line

I hereby confirm that the following information submitted is complete, accurate and not misleading

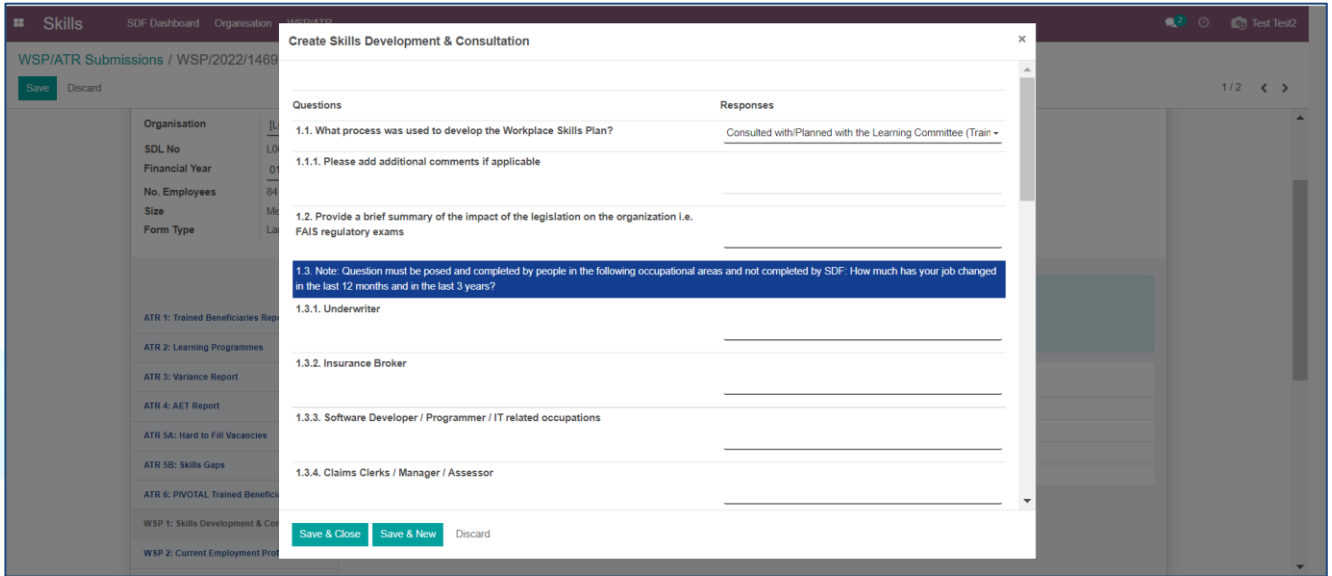
Note:



- Other in the form refers to non-South African citizens.
- Your disability ratio must be included in your male and female ratio. For example: 5 males + 5 females = 10 employees of the 10 employees 2 are disabled.
- Other option allows you to report on foreign nationals included in Race gender break down. For Example: 5 males + 5 females = 10 employees of the 10 employees 2 of the males are foreign nationals, out of the total of 4 foreign nationals 1 is disabled.

- ☞ Check on the declaration tick-box

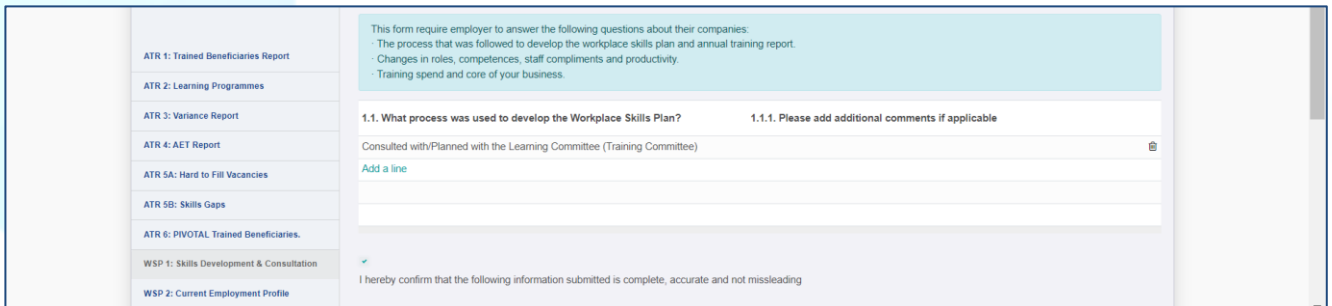


## 6.10 STEP 9- Skills Development & Consultation



-  Click **Skills Development & Consultation**
-  Click on **Add a line** to edit data
-  Complete form and click **Save & Close**

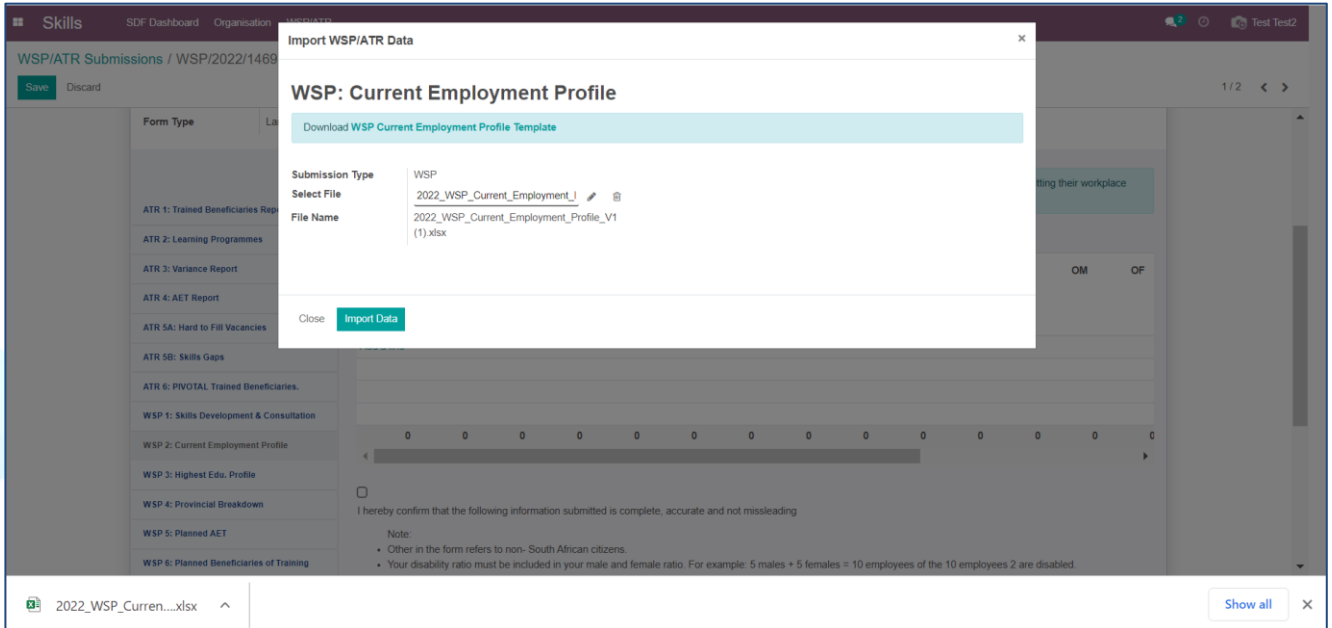
The Data is Captured and populates on the system as shown below



-  Check the declaration tick-box

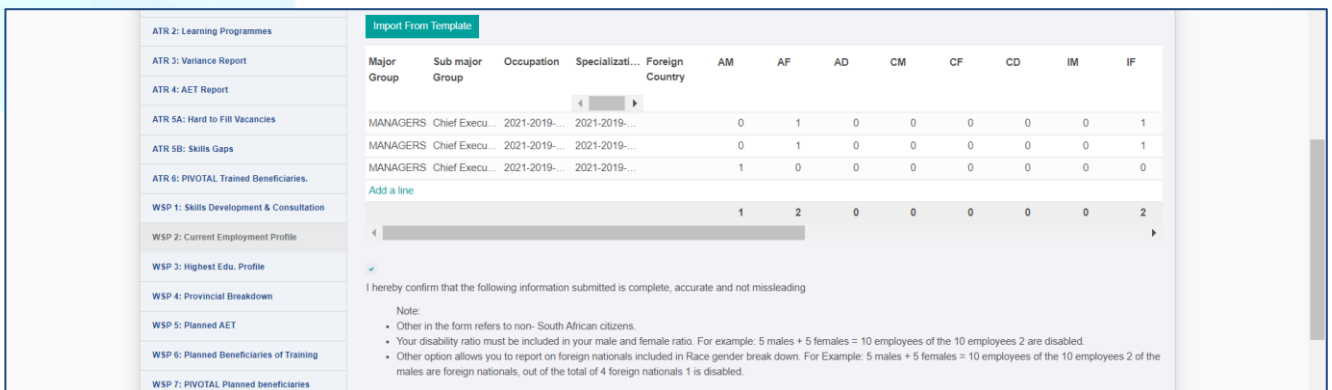


## 6.1 | STEP 10- Current Employment Profile



- 🖱️ Click **Current Employment Profile**
- 🖱️ On the pop-up screen, Click **Download Current Employment Profile**
- 🖱️ The file is downloaded on your machine
- 🖱️ Click on **Upload file** then browse your machine and select the saved file
- 🖱️ Click **Import Data**

The Data is imported and populates on the system as shown below



- 🖱️ Check the declaration tick-box

## 6.12 STEP 11 - Highest Educational Profile

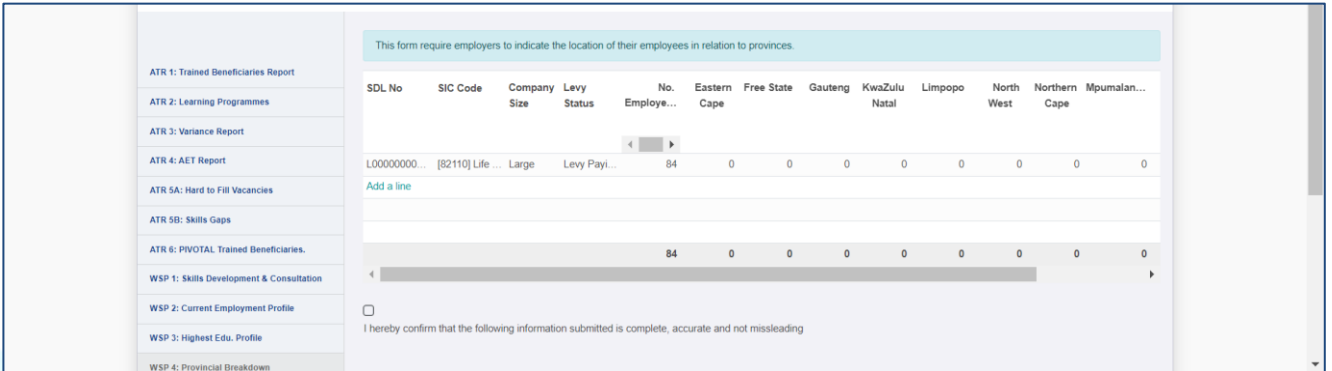
- ☞ Click **Highest Educational Profile**
- ☞ On the pop-up screen, Click **Download Highest Educational Profile**
- ☞ The file is downloaded on your machine
- ☞ Click on **Upload file** then browse your machine and select the saved file
- ☞ Click **Import Data**

The Data is imported and populates on the system as shown below

NQF Level Of Skill Priority	AM	AF	AD	CM	CF	CD	IM	IF	ID	WM	WF	WD	O
NQF Level ...	0	1	0	0	0	0	0	1	1	0	0	0	
NQF Level ...	0	1	0	0	0	0	0	1	1	0	0	0	
NQF Level ...	1	0	0	0	0	0	0	0	0	0	0	0	
<b>Add a line</b>	<b>1</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	

- ☞ Check the declaration tick-box

## 6.13 STEP 12- Provincial Background



This form requires employers to indicate the location of their employees in relation to provinces.

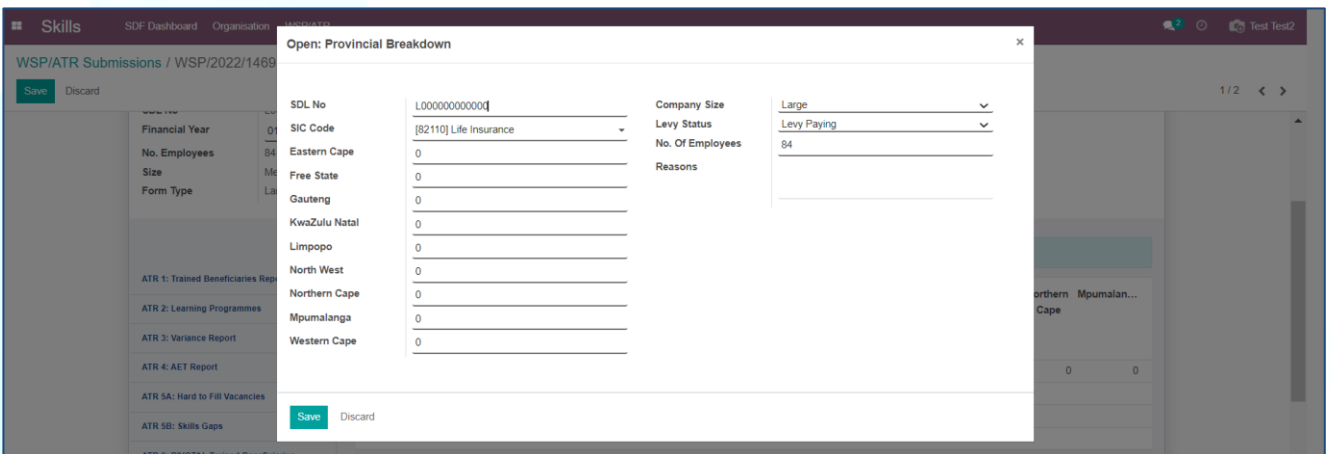
SDL No	SIC Code	Company Size	Levy Status	No. of Employees	Eastern Cape	Free State	Gauteng	KwaZulu Natal	Limpopo	North West	Northern Cape	Mpumalanga
L00000000...	[82110] Life Insurance	Large	Levy Paying	84	0	0	0	0	0	0	0	0
					84	0	0	0	0	0	0	0

I hereby confirm that the following information submitted is complete, accurate and not misleading

Click **Provincial Background**

The file system autopopulates this section based on the company information provided

To validate the information,



Open: Provincial Breakdown

SDL No: L000000000000

SIC Code: [82110] Life Insurance

Company Size: Large

Levy Status: Levy Paying

No. of Employees: 84

Reasons:

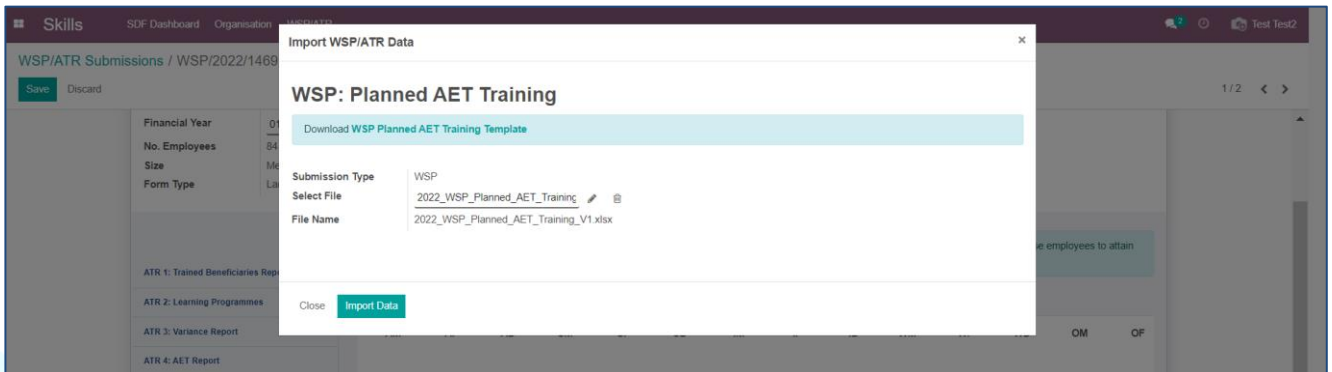
Eastern Cape	0
Free State	0
Gauteng	0
KwaZulu Natal	0
Limpopo	0
North West	0
Northern Cape	0
Mpumalanga	0
Western Cape	0

Save Discard

Click on the populated line item to edit

Validate the data and then Click **Save**

## 6.14 STEP 13- Planned AET



- ☞ Click **Planned AET**
- ☞ On the pop-up screen, Click **Download WSP Planned AET Training Template**
- ☞ The file is downloaded on your machine
- ☞ Click on **Upload file** then browse your machine and select the saved file
- ☞ Click **Import Data**

The Data is imported and populates on the system as shown below

Major Group	Sub major Group	Occupation	Specializati...	Foreign Country	AM	AF	AD	CM	CF	CD	IM	IF
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...		0	1	0	0	0	0	0	1
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...		0	1	0	0	0	0	0	1
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...		1	0	0	0	0	0	0	0
Add a line					1	2	0	0	0	0	0	2

I hereby confirm that the following information submitted is complete, accurate and not misleading

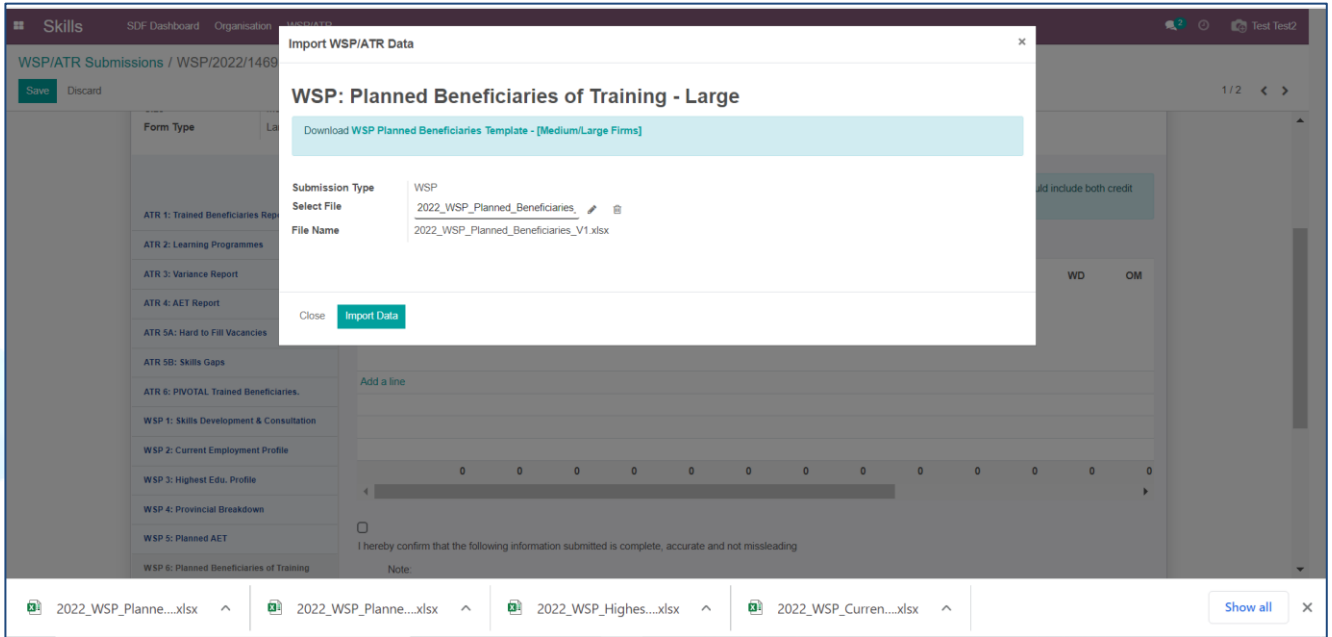
Note:

- Other in the form refers to non- South African citizens.
- Your disability ratio must be included in your male and female ratio. For example: 5 males + 5 females = 10 employees of the 10 employees 2 are disabled.
- Other option allows you to report on foreign nationals included in Race gender break down. For Example: 5 males + 5 females = 10 employees of the 10 employees 2 of the males are foreign nationals, out of the total of 4 foreign nationals 1 is disabled.

- ☞ Check the declaration tick-box



## 6.15 STEP 14- Planned Beneficiaries of Training



- ☞ Click **Planned Beneficiaries of Training**
- ☞ On the pop-up screen, Click **Download Planned Beneficiaries of Training**
- ☞ The file is downloaded on your machine
- ☞ Click on **Upload file** then browse your machine and select the saved file
- ☞ Click **Import Data**

The Data is imported and populates on the system as shown below

Move to Pivotal?	Major Group	Sub major Group	Occupation	Specializati...	Programme Level	Municipality	Scarce and Critical Skills Priority	Foreign Country	AM	AF	AD	CM
<input type="checkbox"/>	MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Advanced	Amahlathi	None		0	1	0	
<input type="checkbox"/>	MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Intermediate	Amahlathi			0	1	0	
<input type="checkbox"/>	MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Entry	Albert Lut...	2019-33210...		1	0	0	
									1	2	0	

I hereby confirm that the following information submitted is complete, accurate and not misleading

Note:

- Other in the form refers to non- South African citizens.
- Your disability ratio must be included in your male and female ratio. For example: 5 males + 5 females = 10 employees of the 10 employees 2 are disabled.
- Other option allows you to report on foreign nationals included in Race gender break down. For Example: 5 males + 5 females = 10 employees of the 10 employees 2 of the males are foreign nationals, out of the total of 4 foreign nationals 1 is disabled.

- ☞ Check the declaration tick-box
- ☞ Select line item to copy data to Pivotal Planned beneficiaries

**Open: Planned Beneficiaries**

Move to Pivotal?

OFO Occupation: 2021-2019-111102 - Parliamentarian | OFO Specialisation: 2021-2019-111102 - State Secretary

Municipality: Amahlathi | Programme Level: Advanced

Scarce and Critical Skills Priority: None | Foreign Country: [Empty]

African Male: 0 | Coloured Male: 0

African Female: 1 | Coloured Female: 0

African Disabled: 0 | Coloured Disabled: 0

Indian/Asian Male: 0 | White Male: 0

Indian/Asian Female: 1 | White Female: 0

Indian/Asian Disabled: 1 | White Disabled: 0

Foreign National Male: 0 | Age <35: 0

Foreign National Female: 0 | Age 35-54: 0

Foreign National Disabled: 0 | Age 55-64: 0

Age > 64: 2

Buttons: Save, Discard

- Check the Move to Pivotal tick-box
- Click **Save**

Major Group	Sub major Group	Occupation	Specializati...	Programme Level	Traini... Provider	Municipality	Pivotal Programme	Socio Economic Status	Start Date	End Date	Forei... Country
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Advanced	Test 3	Amahlathi	50182 - Adv...	UnEmployed	01/03/2014	05/03/2014	
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Intermediate	Test 2	Amahlathi	78767 - Ma...	Employed	01/02/2014	05/02/2014	

Add a line

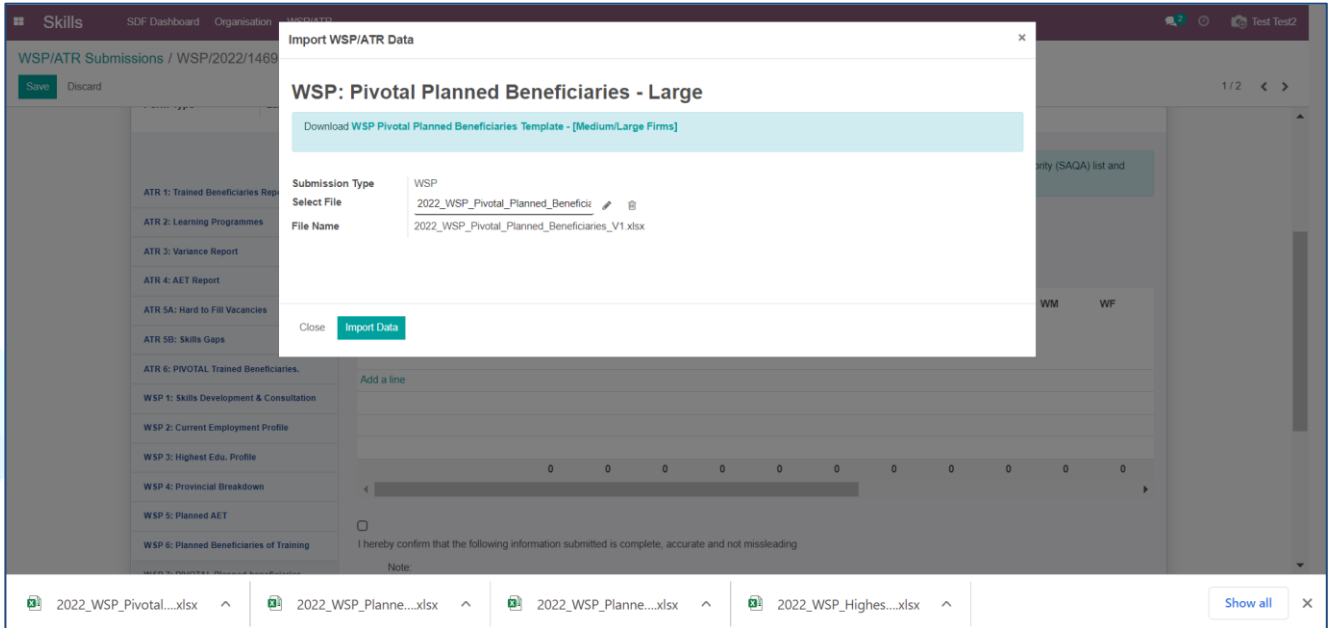
I hereby confirm that the following information submitted is complete, accurate and not misleading

Note:

- Other in the form refers to non- South African citizens.
- Your disability ratio must be included in your male and female ratio. For example: 5 males + 5 females = 10 employees of the 10 employees 2 are disabled.
- Other option allows you to report on foreign nationals included in Race gender break down. For Example: 5 males + 5 females = 10 employees of the 10 employees 2 of the males are foreign nationals, out of the total of 4 foreign nationals 1 is disabled.

The data is successfully moved to Pivotal Planned Beneficiaries

## 6.16 STEP 15- Pivotal Planned Beneficiaries- Large



- 🖱️ Click **Pivotal Planned Beneficiaries**
- 🖱️ On the pop-up screen, Click **Download WSP Pivotal Planned Beneficiaries Template**
- 🖱️ The file is downloaded on your machine
- 🖱️ Click on **Upload file** then browse your machine and select the saved file
- 🖱️ Click **Import Data**

The Data is imported and populates on the system as shown below

Major Group	Sub major Group	Occupation	Specializati...	Programme Level	Traini...	Municipality Provider	Pivotal Programme	Socio Economic Status	Start Date	End Date	Forei... Country
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Advanced	Test 3	Amahlathi	50182 - Adv...	UnEmployed	01/03/2014	05/03/2014	
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Intermediate	Test 2	Amahlathi	78767 - Ma...	Employed	01/02/2014	05/02/2014	
MANAGERS	Chief Execu...	2021-2019-...	2021-2019-...	Entry	Test	Albert Lut...	50182 - Adv...	UnEmployed	12/30/2013	05/01/2014	

I hereby confirm that the following information submitted is complete, accurate and not misleading

Note:

- Other in the form refers to non- South African citizens.
- Your disability ratio must be included in your male and female ratio. For example: 5 males + 5 females = 10 employees 2 are disabled.
- Other option allows you to report on foreign nationals included in Race gender break down. For Example: 5 males + 5 females = 10 employees of the 10 employees 2 of the males are foreign nationals, out of the total of 4 foreign nationals 1 is disabled.

- 🖱️ Check the declaration tick-box

## 6.17 STEP 16- Documents Upload

The following documents are mandatory and MUST be uploaded:

- Authorisation Page
- Banking Details
- FSP License

Document Relates to	Financial Year	File Name
Add a line		

- Click **Documents Upload**
- Click **Add a line**

Financial Year: 01 April 2022 - 31 March 2023

Document Type: Authorisation Page

Select File: N000000015\_WSP\_2021\_14692\_authoriz...

File Name: N000000015\_WSP\_2021\_14692\_authorizationpage.pdf

Comment:

Buttons: Save & Close, Save & New, Discard

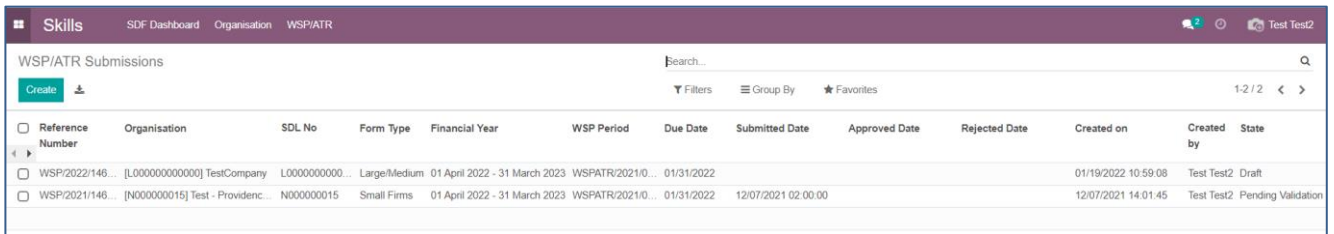
- Select Document Type
- Select and Upload File
- Click **Save & Close**

The required documents are successfully uploaded

Document Relates to	Financial Year	File Name
Authorisation Page	01 April 2022 - 31 March 2023	N000000015_WSP_2021_14692_authorizationpage.pdf
Banking Details	01 April 2022 - 31 March 2023	N000000015_WSP_2021_14692_authorizationpage.pdf
FSP License	01 April 2022 - 31 March 2023	N000000015_WSP_2021_14692_authorizationpage.pdf
Add a line		

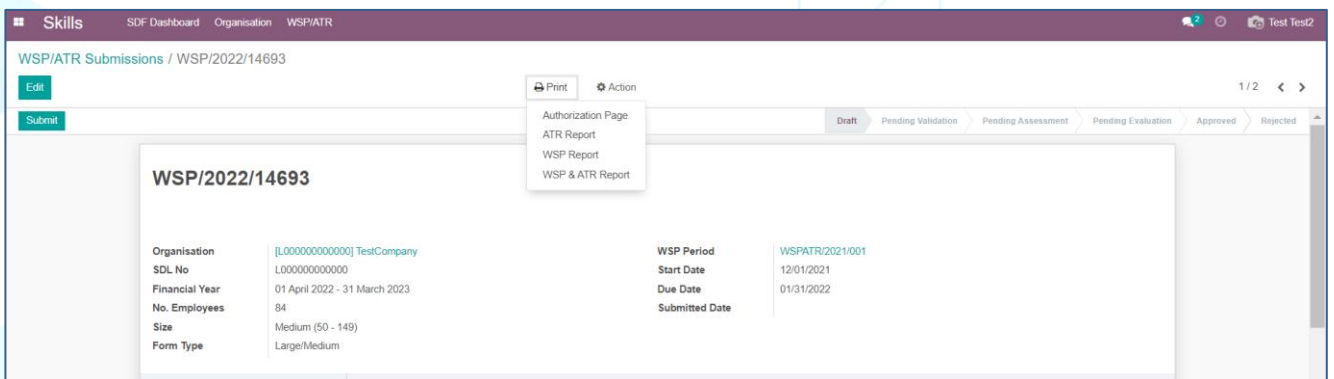


## 6.18 STEP 17- Download Authorisation Page



Reference Number	Organisation	SDL No	Form Type	Financial Year	WSP Period	Due Date	Submitted Date	Approved Date	Rejected Date	Created on	Created by	State
WSP/2022/146...	[L000000000000] TestCompany	L000000000000	Large/Medium	01 April 2022 - 31 March 2023	WSPATR/2021/0...	01/31/2022				01/19/2022 10:59:08	Test Test2	Draft
WSP/2021/146...	[N0000000015] Test - Providenc...	N0000000015	Small Firms	01 April 2022 - 31 March 2023	WSPATR/2021/0...	01/31/2022	12/07/2021 02:00:00			12/07/2021 14:01:45	Test Test2	Pending Validation

- 🖱️ Click **WSP/ATR**, then **WSP/ATR Submission**
- 🖱️ Search and select the draft



**WSP/2022/14693**

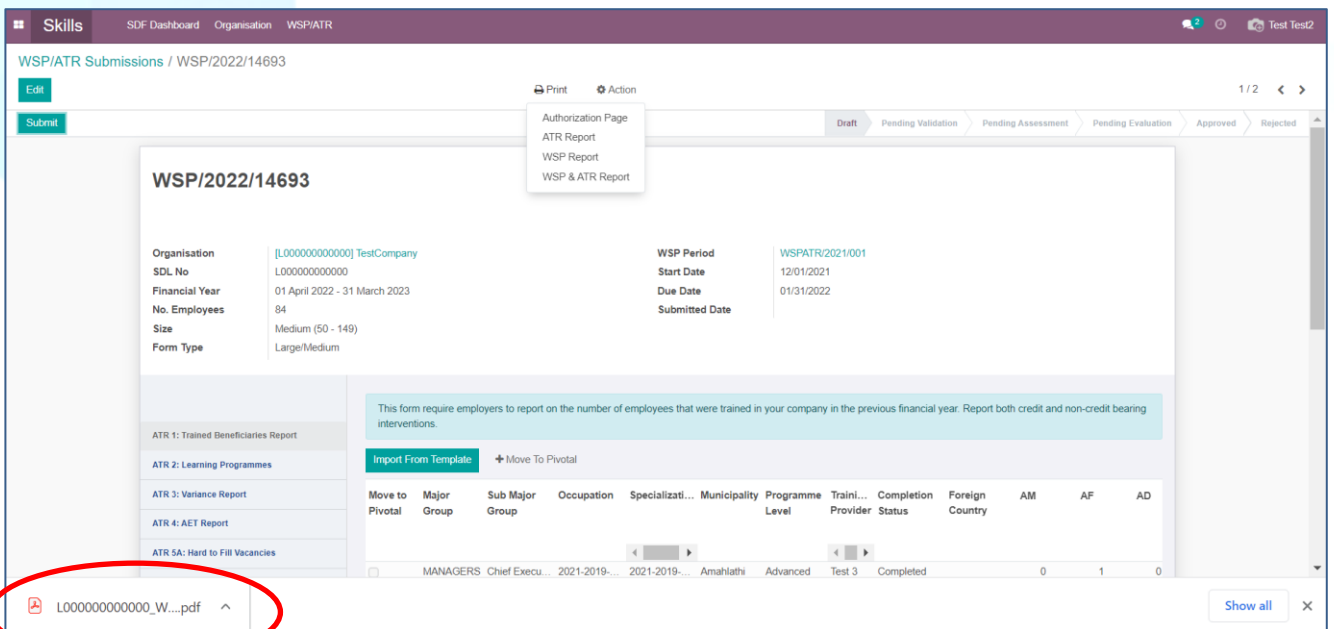
Organisation: [L000000000000] TestCompany  
 SDL No: L000000000000  
 Financial Year: 01 April 2022 - 31 March 2023  
 No. Employees: 84  
 Size: Medium (50 - 149)  
 Form Type: Large/Medium

WSP Period: WSPATR/2021/001  
 Start Date: 12/01/2021  
 Due Date: 01/31/2022  
 Submitted Date:

Buttons: Print, Action (Dropdown: Authorization Page, ATR Report, WSP Report, WSP & ATR Report)

Progress: Draft → Pending Validation → Pending Assessment → Pending Evaluation → Approved → Rejected

- 🖱️ Click **Print**
- 🖱️ Click **Authorisation Page**



**WSP/2022/14693**

Organisation: [L000000000000] TestCompany  
 SDL No: L000000000000  
 Financial Year: 01 April 2022 - 31 March 2023  
 No. Employees: 84  
 Size: Medium (50 - 149)  
 Form Type: Large/Medium

WSP Period: WSPATR/2021/001  
 Start Date: 12/01/2021  
 Due Date: 01/31/2022  
 Submitted Date:

Buttons: Print, Action (Dropdown: Authorization Page, ATR Report, WSP Report, WSP & ATR Report)

Progress: Draft → Pending Validation → Pending Assessment → Pending Evaluation → Approved → Rejected

Form Description: This form require employers to report on the number of employees that were trained in your company in the previous financial year. Report both credit and non-credit bearing interventions.

Table Headers: Move to Pivotal, Major Group, Sub Major Group, Occupation, Specializati..., Municipality, Programme Level, Traini..., Completion Provider Status, Foreign Country, AM, AF, AD

Table Row: MANAGERS Chief Execu... 2021-2019-... 2021-2019-... Amahlathi Advanced Test 3 Completed 0 1 0

Downloaded File: L000000000000\_W....pdf (highlighted with a red circle)

Buttons: Show all, X

The Authorisation page is downloaded on the local machine

- 🖱️ Double click on document to open

L000000000000\_WSP\_2022\_14693\_authorizationpage (1).pdf | 1 / 2 | 60%

### ATR YEAR 2022 AND WSP YEAR 2023 TEMPLATES

**DHET Registered Name: TESTCOMPANY**  
**SETA Registered Name: TESTCOMPANY**  
**Company Size: Medium (50 - 149)**  
**L000000000000**  
**SDF: Test Test2**  
**Submission Date:**

**PLEASE NOTE**

1. IT IS IMPORTANT TO COMPLETE ALL THE SECTIONS OF THE REPORTS
2. WHERE A SECTION IS NOT RELEVANT, PLEASE INDICATE SO IN YOUR REPORT. THE INFORMATION REQUIRED IS IMPORTANT FOR THE SETA'S REPORTING TO THE DEPARTMENT OF HIGHER EDUCATION AND TRAINING FOR COMPILATION OF THE SECTOR SKILLS PLAN.

## 6.19 STEP 18- WSP Submission

Skills SDF Dashboard Organisation WSP/ATR

WSP/ATR Submissions / WSP/2022/14693

Edit Print Action

1 / 2 < >

Submit Draft Pending Validation Pending Assessment Pending Evaluation Approved Rejected

**WSP/2022/14693**

Organisation	[L000000000000] TestCompany	WSP Period	WSPATR/2021/001
SDL No	L000000000000	Start Date	12/01/2021
Financial Year	01 April 2022 - 31 March 2023	Due Date	01/31/2022
No. Employees	84	Submitted Date	
Size	Medium (50 - 149)		
Form Type	Large/Medium		

Once all data is capture and documents are uploaded, Click on **Submit**

Confirmation

Are you sure you want to submit this WSP?

Ok Cancel

Click **Ok** on the pop-up screen to confirm

If there are errors, the system will display all information that needs correction

Skills SDF Dashboard Organisation WSP/ATR

WSP/ATR Submissions / WSP/2022/14693

Edit Print Action

1 / 2 < >

Submit Draft Pending Validation Pending Assessment Pending Evaluation Approved Rejected

**WSP/2022/14693**

Organisation	[L000000000000] TestCompany	WSP Period	WSPATR/2021/001
SDL No	L000000000000	Start Date	12/01/2021

Validation Error

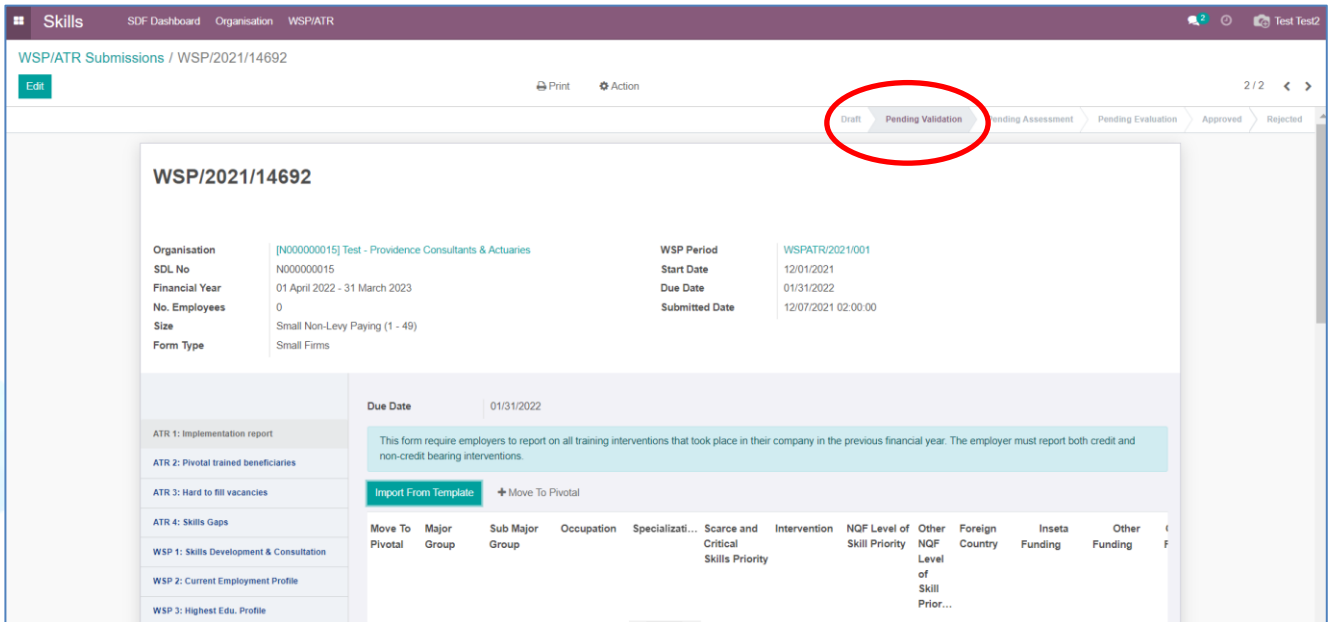
Please fix the following issues:

1. Total sum of employees in all Provinces ( Provincial Breakdown Report) Must equal Number of Employees (Current FY) recorded in Organisation Details for "TestCompany"

Number of Employees (Current FY) = 5  
No of Employees (Provincial Breakdown) = 0

Ok

Take note of these and fix by manually correcting the forms as suggested by the system



Skills SDF Dashboard Organisation WSP/ATR Test Test2

WSP/ATR Submissions / WSP/2021/14692

Edit Print Action 2 / 2 < >

Draft **Pending Validation** Pending Assessment Pending Evaluation Approved Rejected

**WSP/2021/14692**

Organisation [N000000015] Test - Providence Consultants & Actuaries WSP Period WSPATR/2021/001  
 SDL No N000000015 Start Date 12/01/2021  
 Financial Year 01 April 2022 - 31 March 2023 Due Date 01/31/2022  
 No. Employees 0 Submitted Date 12/07/2021 02:00:00  
 Size Small Non-Levy Paying (1 - 49)  
 Form Type Small Firms

Due Date 01/31/2022

ATR 1: Implementation report This form require employers to report on all training interventions that took place in their company in the previous financial year. The employer must report both credit and non-credit bearing interventions.  
 ATR 2: Pivotal trained beneficiaries  
 ATR 3: Hard to fill vacancies Import From Template + Move To Pivotal  
 ATR 4: Skills Gaps  
 WSP 1: Skills Development & Consultation  
 WSP 2: Current Employment Profile  
 WSP 3: Highest Edu. Profile

Move To Pivotal	Major Group	Sub Major Group	Occupation	Specialization	Scarce and Critical Skills Priority	Intervention	NQF Level of Skill Priority	Other NQF Level of Skill Prior...	Foreign Country	Inseta Funding	Other Funding
-----------------	-------------	-----------------	------------	----------------	-------------------------------------	--------------	-----------------------------	-----------------------------------	-----------------	----------------	---------------

🖱️ Once all errors are fixed, Click **Submit**

The status of the submission shows as Pending Validation



**You have successfully completed the WSP ATR Submission on the system. An email will then be sent to the Skills department for verification and approval.**

**Once the application is finalised, the WSP will receive email**