



## MIS IMPLEMENTATION



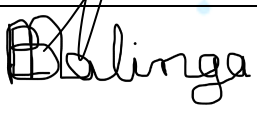

# SKILLS MODULE TRAINING GUIDE Small Organisations

*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		26 January 2022
Adeline Singh	Skills Manager		25 January 2022
London Malinga	Skills Specialist		21 January 2022
Ivy Pilane	Project Manager		
Malindi Madumo	Change Manager		20/01/2022

### 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

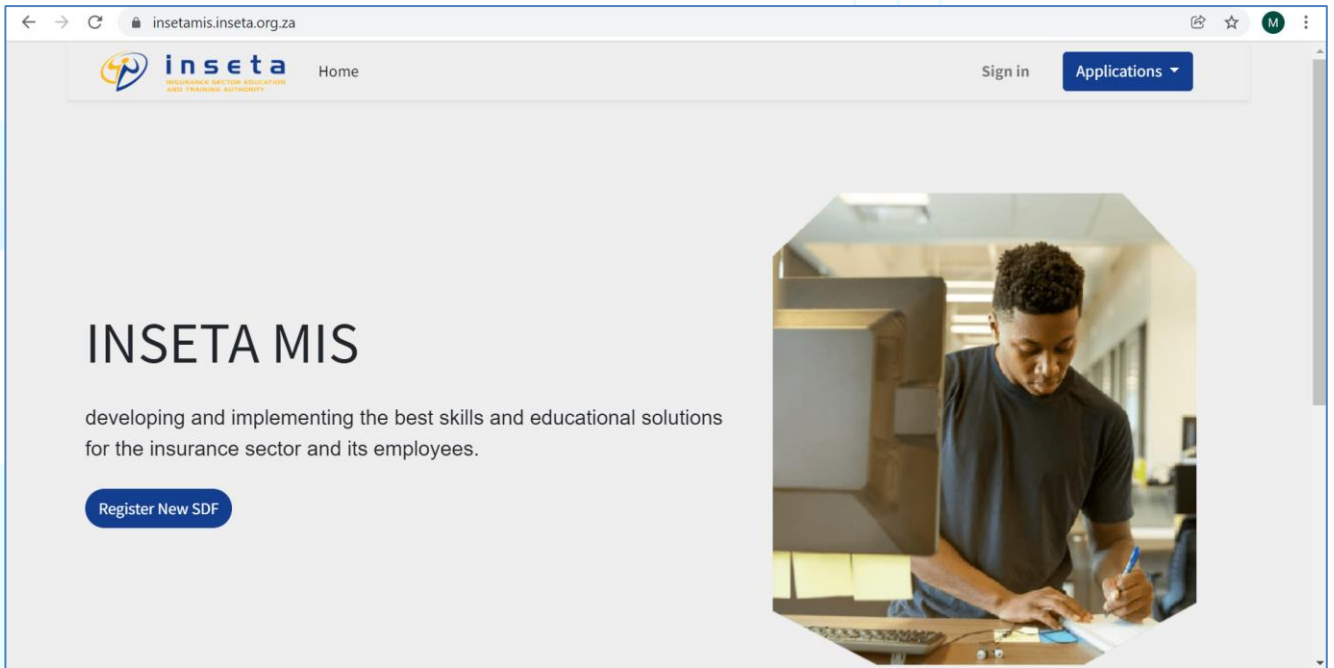
The objective of this training manual is to provide a step-by-step guide on how to execute the following processes on the system:

- 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

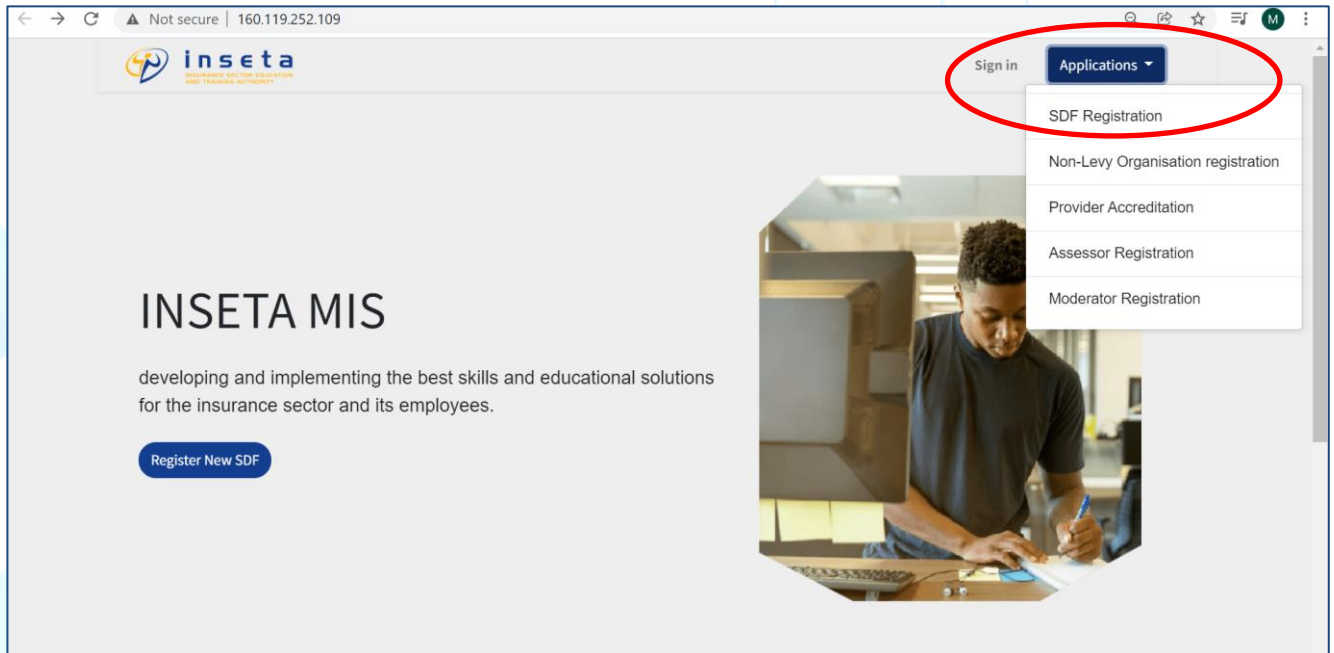
The following table includes abbreviations or notations that are used in the document and on the system.

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 1- SDF Registration

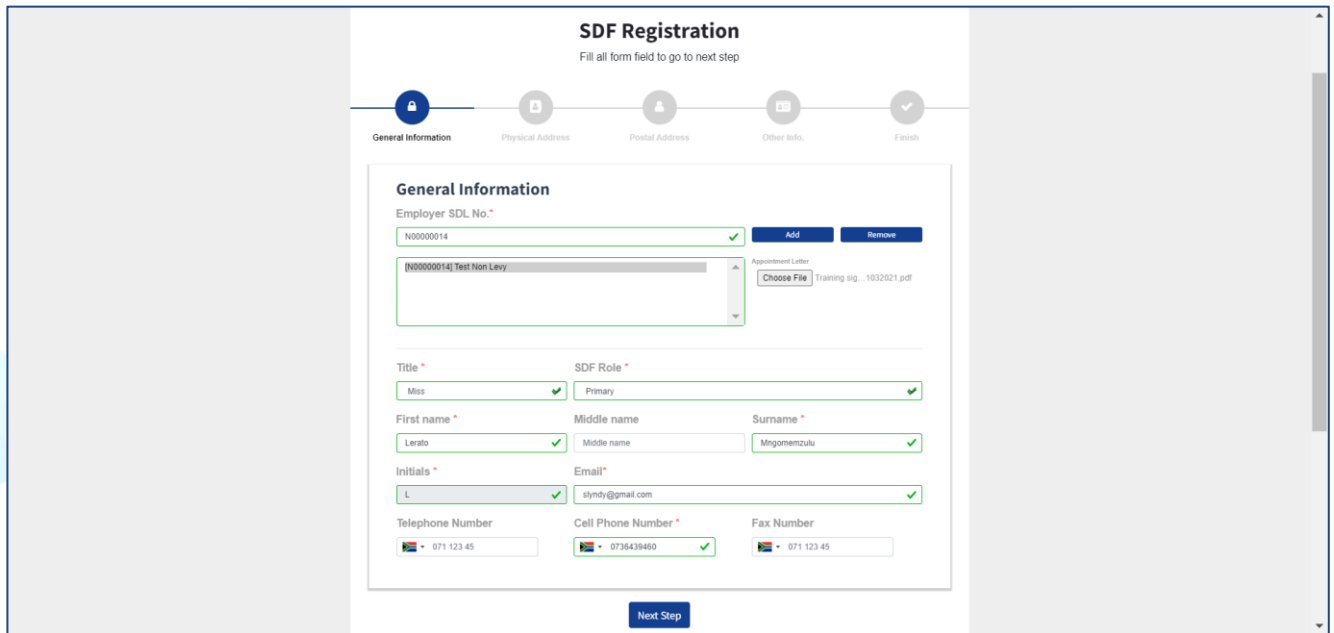





- 🖱 On the INSETA MIS landing page, Click on **Applications** to expand dropdown menu
- 🖱 Then, click on **SDF Registration**

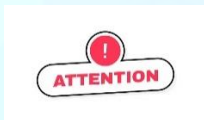
The SDF Registration form is displayed



## 4.2 STEP 2- Capture General Information

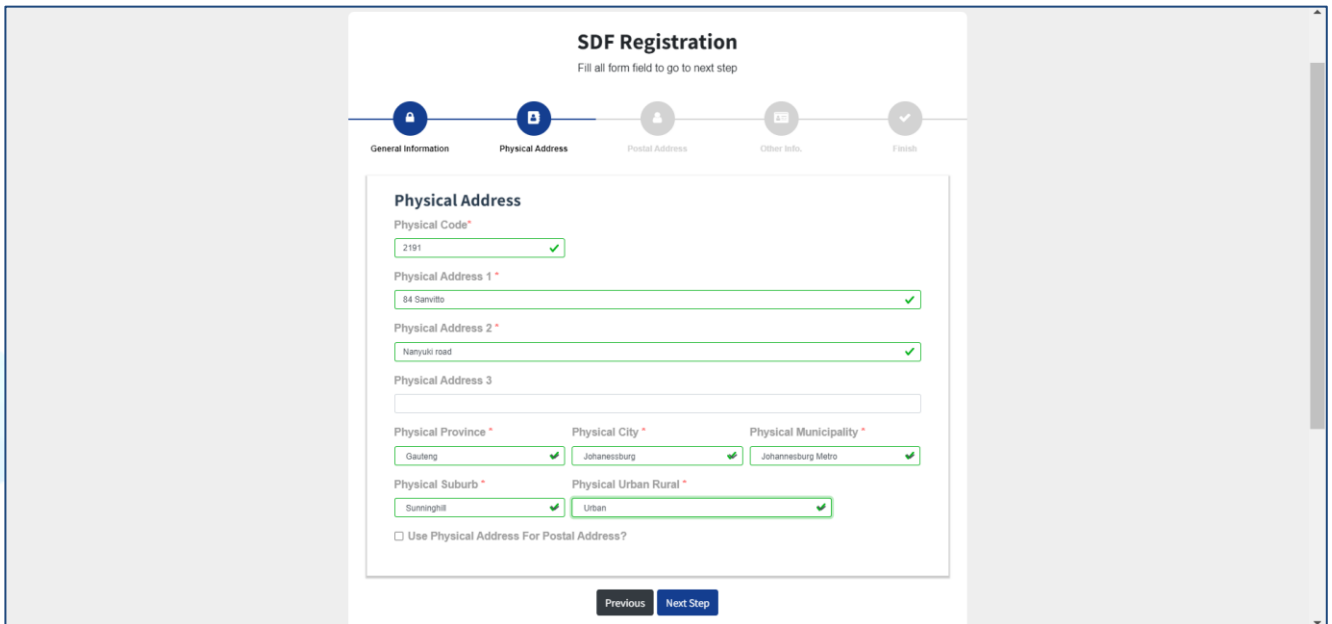


-  Capture the SDL number and click **Add**. The system allows to add multiple employers
-  Upload appointment letter
-  Then, capture all the required general information and click **Next Step**



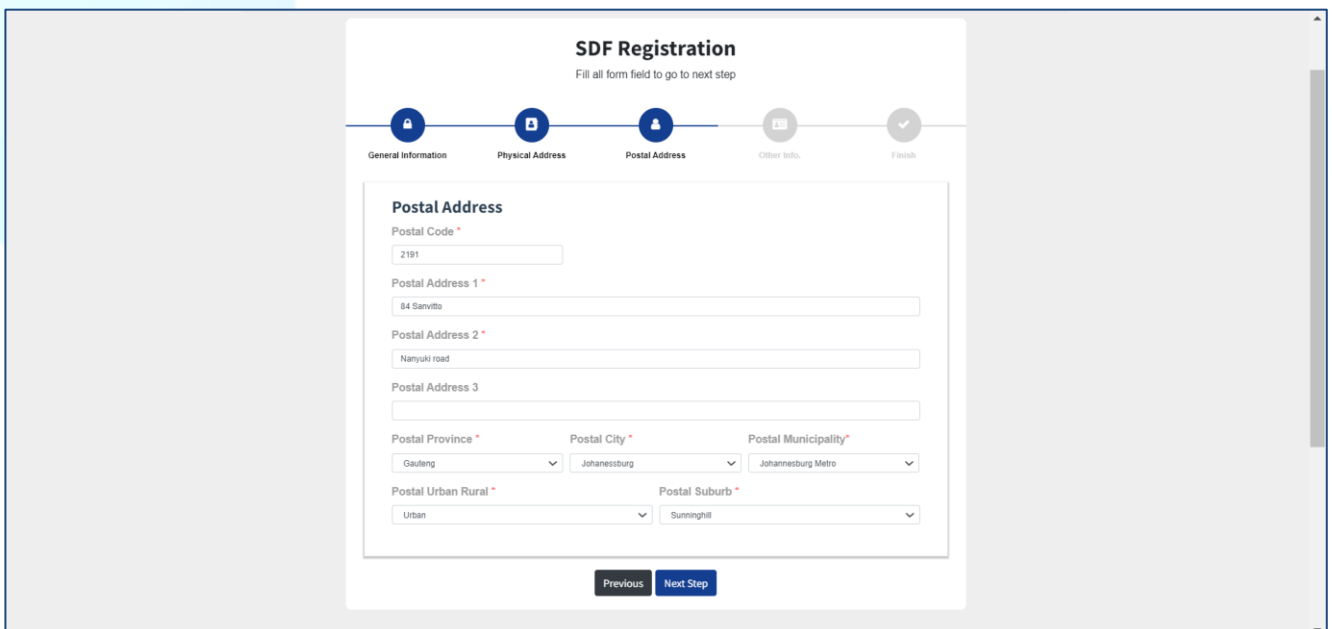
**Please note that the fields marked with an asterisk (\*) are mandatory and should be completed**

### 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

✔  ✔  ✔

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

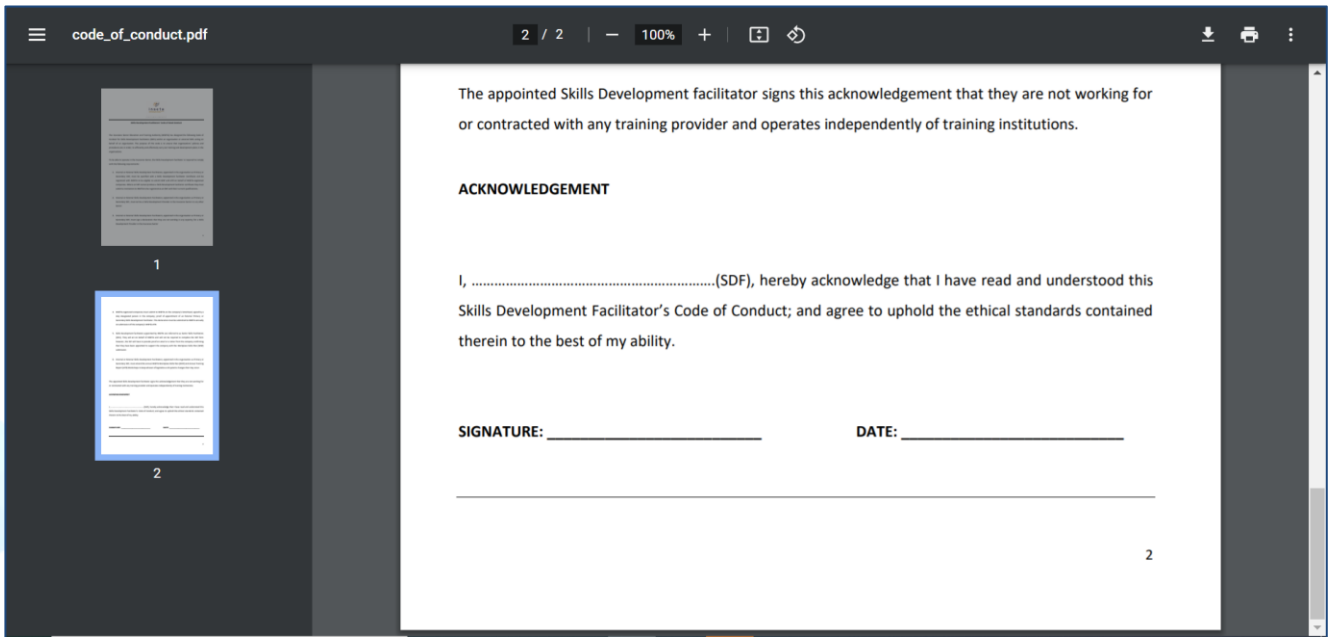
No file chosen

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

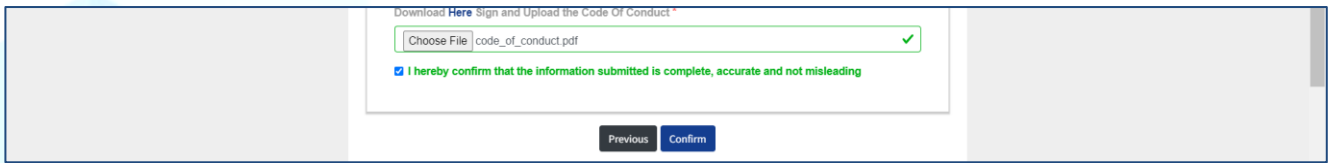
No file chosen

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

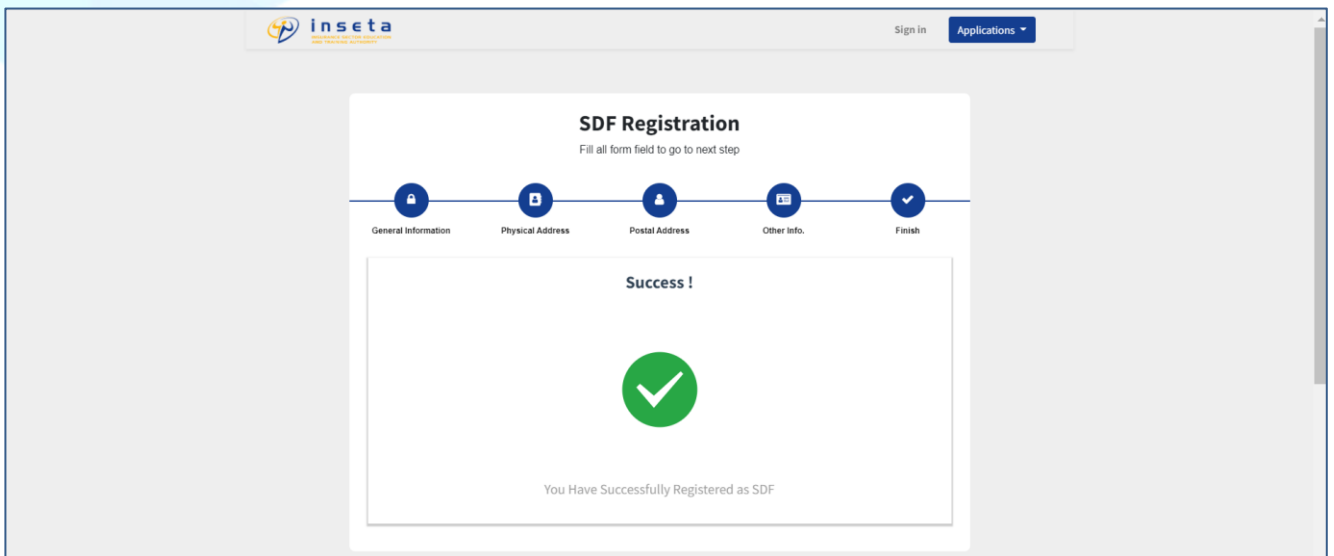
### Click on **Here** to download and sign the Code of Conduct



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.***

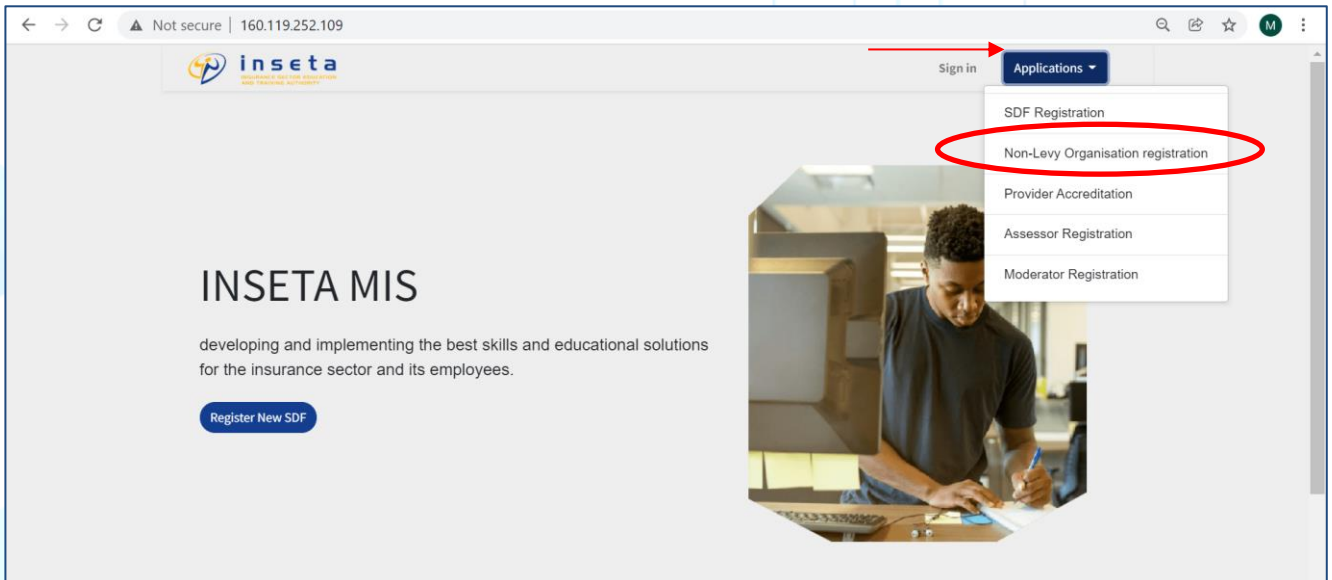
***Once application is finalised, the SDF will receive email with system Login details***

---

## 5 Non-levy Organisation Registration

### 5.1 STEP 1- Register a Non-levy organisation

This section provides a guide on how to register as a non-levy organisation on the system.

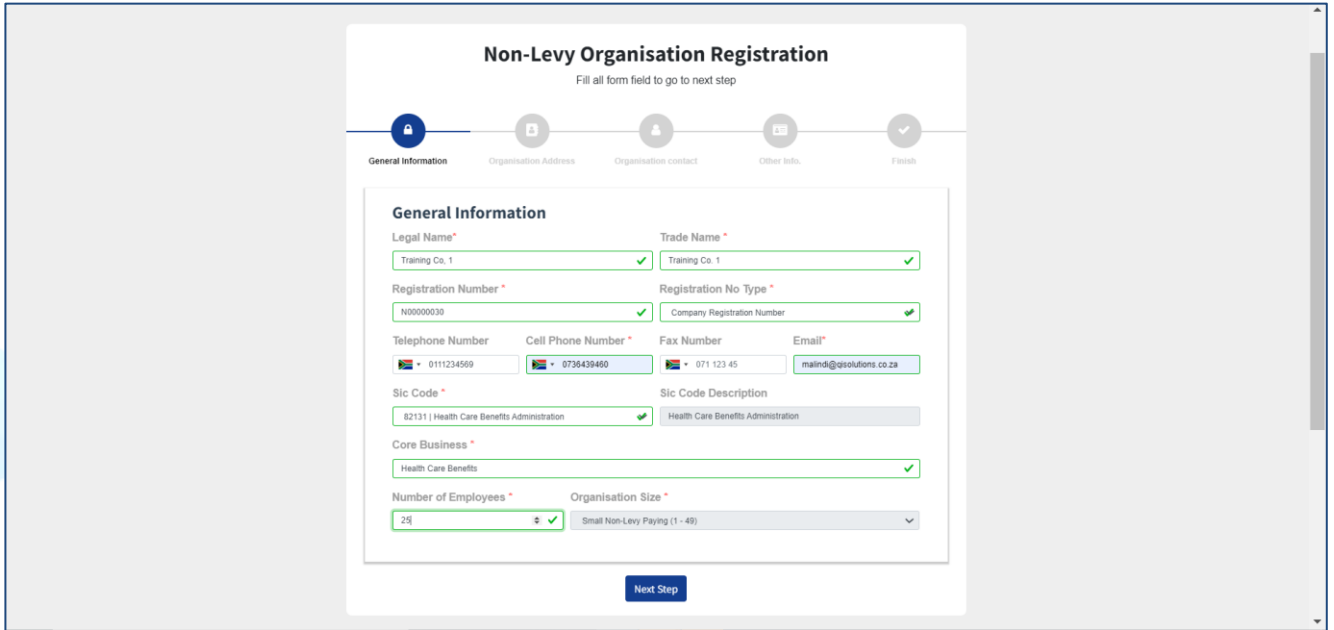



- 🔗 On the INSETA MIS landing page, Click on **Applications** to expand dropdown menu
- 🔗 Then, click on **Non-levy Organisation registration**

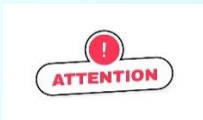


The Non-levy Organisation registration form is displayed

## 5.2 STEP 2- Fill the General Information section



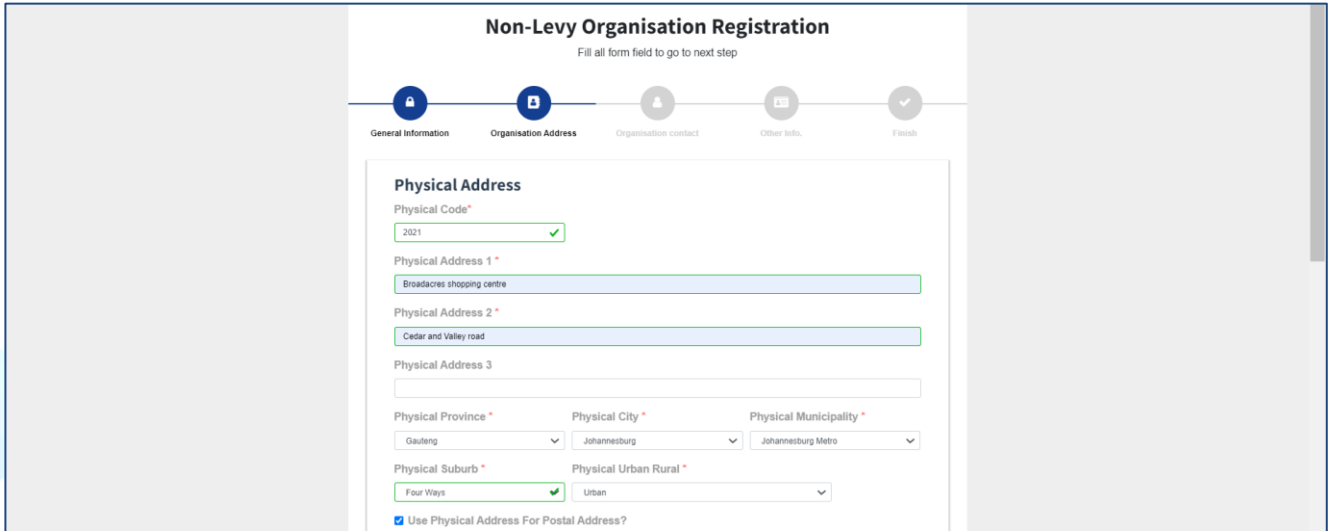
 Capture Organisation general information and then click **Next Step**



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

**The system is setup to only accept a maximum of 49 employees for non-levy paying organisations.**

### 5.3 STEP 3- Capture Organisation Address



**Non-Levy Organisation Registration**  
Fill all form field to go to next step

Progress: General Information (Completed), **Organisation Address** (Current), Organisation contact, Other info., Finish

**Physical Address**

Physical Code\*  
2021 ✓

Physical Address 1\*  
Broadacres shopping centre

Physical Address 2\*  
Cedar and Valley road

Physical Address 3  
[Empty]

Physical Province\*  
Gauteng

Physical City\*  
Johannesburg

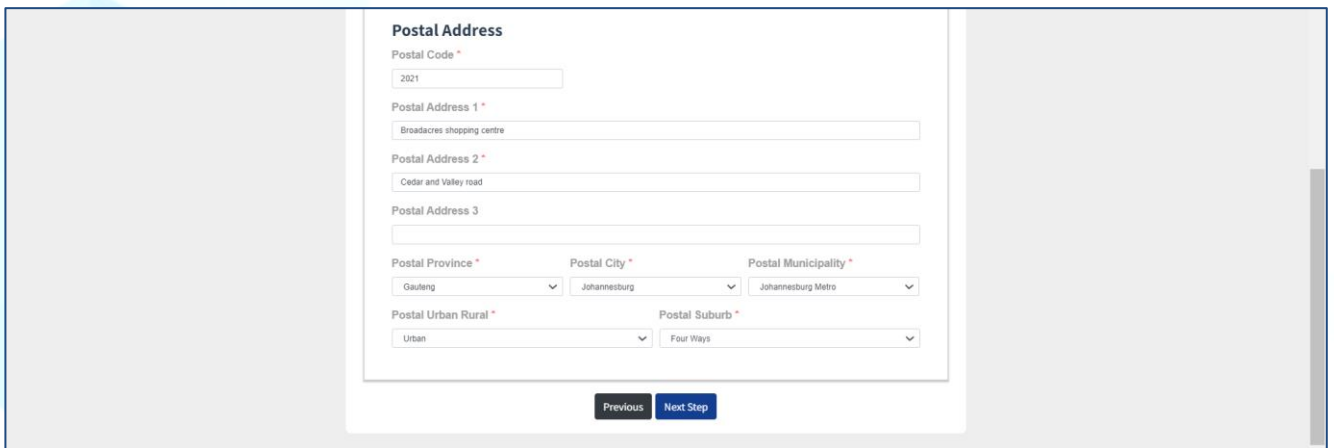
Physical Municipality\*  
Johannesburg Metro

Physical Suburb\*  
Four Ways ✓

Physical Urban Rural\*  
Urban

Use Physical Address For Postal Address?

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



**Postal Address**

Postal Code\*  
2021

Postal Address 1\*  
Broadacres shopping centre

Postal Address 2\*  
Cedar and Valley road

Postal Address 3  
[Empty]

Postal Province\*  
Gauteng

Postal City\*  
Johannesburg

Postal Municipality\*  
Johannesburg Metro

Postal Urban Rural\*  
Urban

Postal Suburb\*  
Four Ways

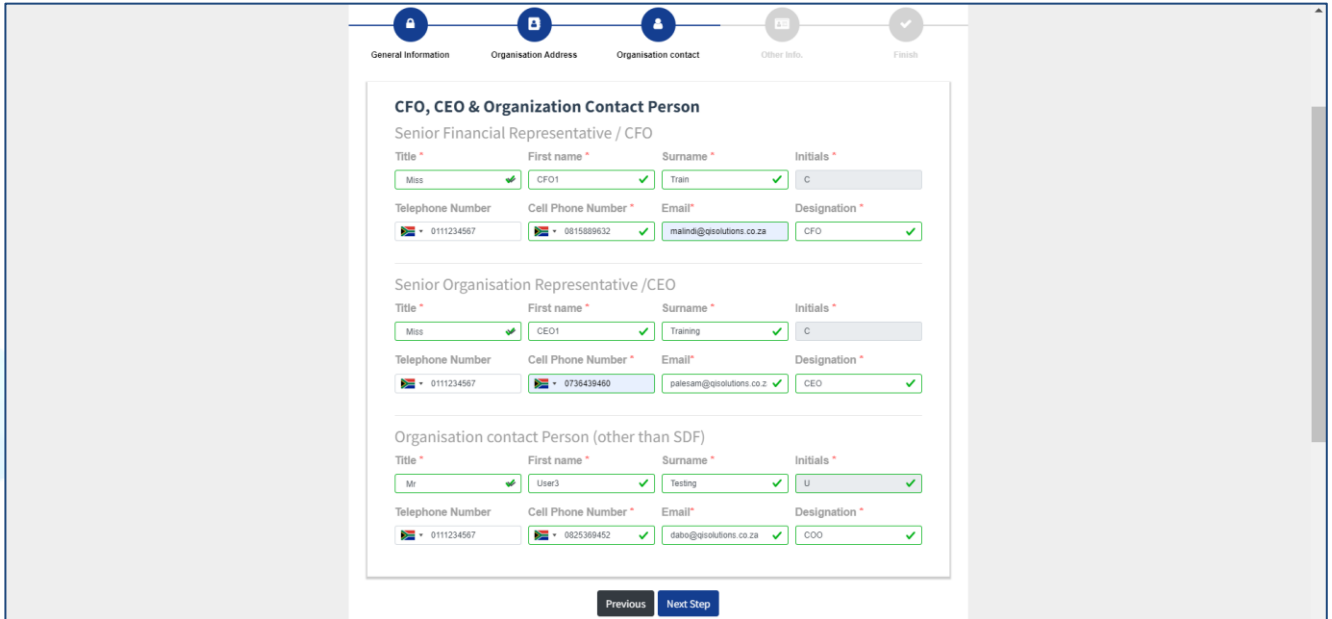
Previous Next Step

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



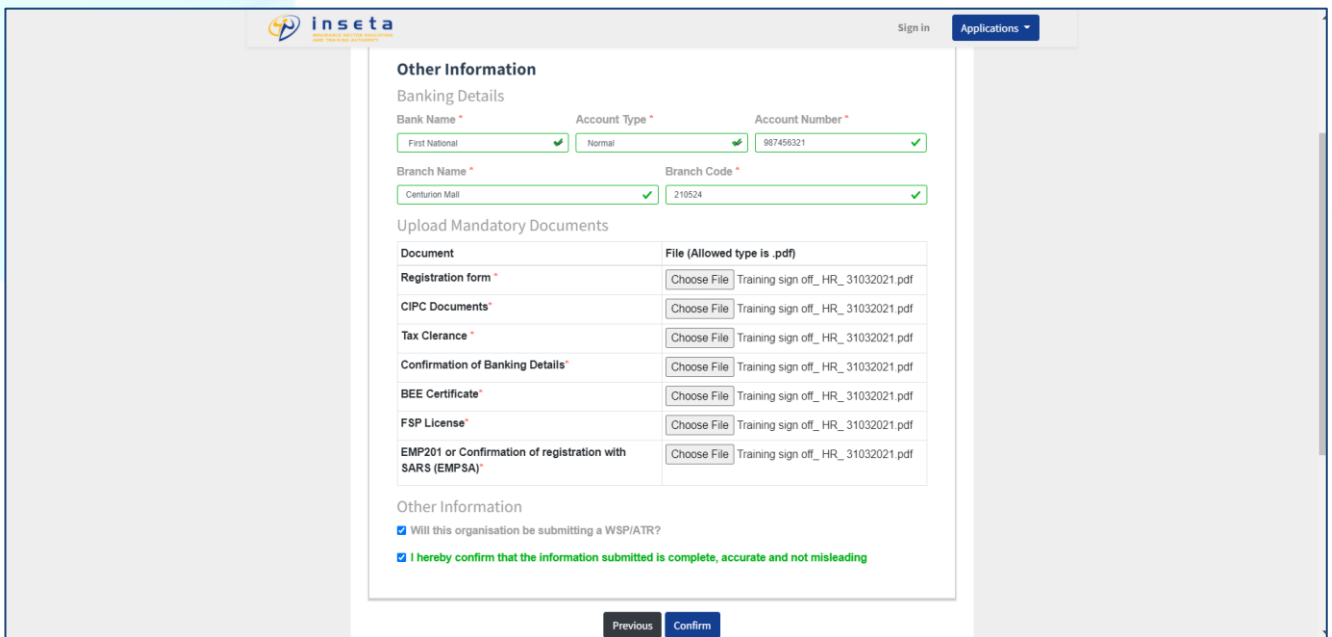


## 5.4 STEP 4- Capture Organisation contact

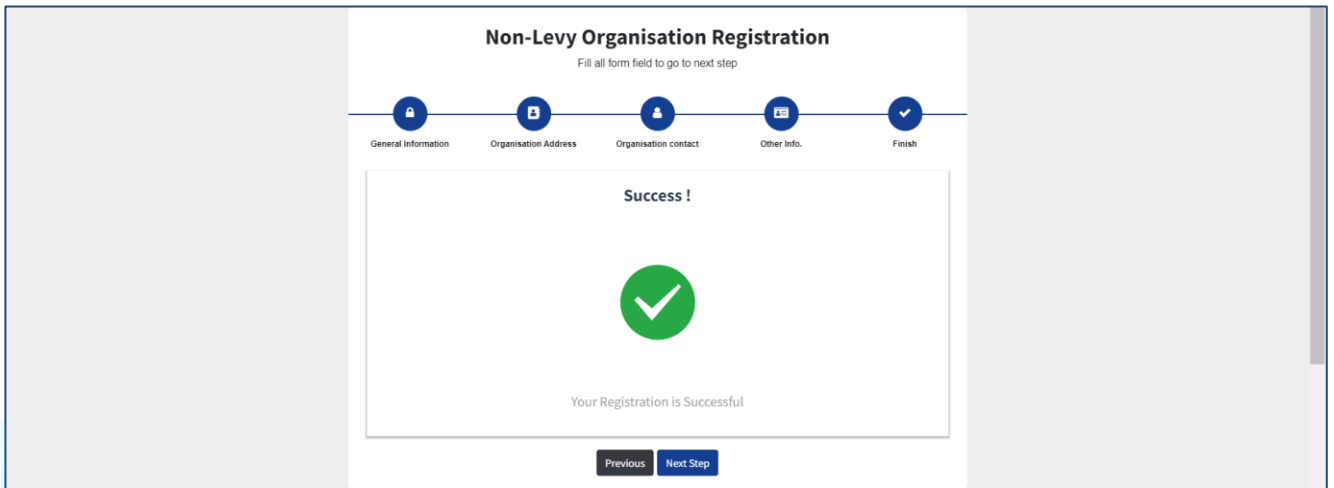


☞ Capture Organisation contact details and click **Next Step**

## 5.5 STEP 5- Fill in Other Info



- ☞ Capture Banking details
- ☞ Upload Mandatory Documents
- ☞ Click on the checkbox **Will this organisation be submitting a WSP/ATR?** If applicable
- ☞ Click on the declaration checkbox **I hereby confirm that the information is complete, accurate and not misleading**
- ☞ Then click **Confirm**



**You have successfully registered the non-levy organisation on the system. An email will then be sent to the Skills Specialist and Manger for verification and approval.**

**Once the application is finalised, the employer will receive email with system enclosing an approval letter.**



## 6 Update existing Organisation details

### 6.1 Updating Organisation Details

Sdl No	Registration No	Trade Name	Legal Name	Phone	Fax Number	Email	Organisation Size	Levy Status	Created on	Stage
N000000015	200/022115/07	Providence Consultants & Actuaries	Providence Consultants & Actuaries	0413954400			Small Non-Levy Paying (1 - 49)	Non-Levy Paying	10/11/2021 10:36:43	Approved

🖱️ Search and click on the organisation

**Edit**

**N000000015 Providence Consultants & Actuaries**

<b>Organisation Details</b>	Trade Name: Providence Consultants & Actuaries	Levy Status: Non-Levy Paying
<b>Child Organisations</b>	Legal Name: Providence Consultants & Actuaries	Phone: 0413954400
<b>Contact Person</b>	BEE Status	Fax Number
<b>Training Committee</b>	<b>Physical Address</b>	Email
<b>CFO</b>	Country: South Africa	Registration No. Type: 200/022115/07
<b>CEO</b>	Street: 37 Empire Road	Core Business: Will submit WSP - ATR?
<b>Banking Details</b>	Street2: Parktown	Is Unionized?: 0
<b>WSP Submissions</b>	Physical Address 3: 2193	Number of Employees: 10
<b>Client Relationship Management</b>	Physical Suburb: Westcliff	Number of Employees (Current FY): 10
<b>Grants &amp; Levies</b>	Physical City: Johannesburg	Organisation Size: Small Non-Levy Paying (1 - 49)
	Physical Province: Eastern Cape (ZA)	SIC Code: [82131] Health Care Benefits Administration
	Physical Urban/Rural: Urban	SIC Code Description: Health Care Benefits Administration
	Physical Municipality: Johannesburg Metro	FSP License
	Use Physical for Postal?: <input checked="" type="checkbox"/>	Other Sector
	<b>Postal Address</b>	Annual Turnover: 0.00
	Postal Address 1: 37 Empire Road	
	Postal Address 2: Parktown	
	Postal Address 3: 2193	

🖱️ Click **Edit** to enable editing Organisation details

Skills SDF Dashboard Organisation WSP/ATR Test Primary SDF

Organisations / [N000000015] Providence Consultants & Actuaries

Save Discard 1/1 < >

Organisation Details

Child Organisations

Contact Person

Training Committee

CFO

CEO

Banking Details

WSP Submissions

Client Relationship Management

Grants & Levies

Trade Name Providence Consultants & Actuaries

Legal Name Providence Consultants & Actuaries

BEE Status

Physical Address

Country South Africa

Street 37 Empire Road

Street2 Parktown

Physical Address 3 Physical Address 3

Physical Code 2193

Physical Suburb Westcliffe

Physical City Johannesburg

Physical Province Eastern Cape (ZA)

Physical Urban/Rural Urban

Physical Municipality Johannesburg Metro

Use Physical for Postal?

Postal Address

Postal Address 1 37 Empire Road

Postal Address 2 Parktown

Postal Address 3 Postal Address 3

Postal Code 2193

Postal Suburb Westcliffe

Postal City Johannesburg

Postal Province Gauteng (ZA)

Postal Urban/Rural Urban

Postal Municipality Johannesburg Metro

Levy Status Non-Levy Paying

Phone 0413954400

Fax Number

Email

Registration No. Type

Registration No 200/022115/07

Core Business

Will submit WSP - ATR?

Is Unionized?

Number of Employees 0

Number of Employees (Current FY) 10

Organisation Size Small Non-Levy Paying (1 - 49)

SIC Code [82131] Health Care Benefits Administration

SIC Code Description Health Care Benefits Administration

FSP License

Other Sector

Annual Turnover 0.00

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



*The Organisation details are successfully updated.*

## 6.2 Verify linked child companies.

Skills SDF Dashboard Organisation WSP/ATR Test Primary SDF

Organisations / [N000000015] Providence Consultants & Actuaries

Edit Action 1/1 < >

Print Approval Letter

Draft Pending Approval Approved Rejected

1 WSP/ATR Sub... 8 DG Applications

N000000015 Providence Consultants & Actuaries

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

Organisation Details

Child Organisations

Contact Person

Training Committee

CFO

CEO

Banking Details

WSP Submissions

Client Relationship Management

Grants & Levies

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

🖱️ Click **Save**

## 6.3 Update Organisation Contacts

Skills SDF Dashboard Organisation WSP/ATR Test Primary SDF

Organisations / [N000000015] Providence Consultants & Actuaries

Save Discard

Print Approval Letter

1 WSP/ATR Sub. 8 DG Applications

N000000015  
Providence Consultants & Actuaries

Title	Name	Job Position	Email	Mobile
Hon	Adeline Davids	CEO	skills@inseta.org.za	0113818900
Miss	Bongli Malinga	Skills bass	mandatory@inseta.org.za	0113818900

Add a line

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

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

Skills SDF Dashboard Organisation WSP/ATR Test Primary SDF

Organisations / [N000000015] Providence Consultants & Actuaries

Save Discard

Print Approval Letter

8 DG Applications

Open: Contact Person

Title: Hon

First Name: Adeline

Surname: Davids

Initials: A

Designation: CEO

Postal Address: 37 Empire Road, Parktown, 2193, Westcliff, Johannesburg - Gauteng (ZA), Urban, Johannesburg Metro

Phone number: 0113818900

Fax number:

Cell Number: 0113818900

Email: skills@inseta.org.za

Save Discard

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

Skills | SDF Dashboard | Organisation | WSP/ATR | Test Primary SDF

Organisations / [N000000015] Providence Consultants & Actuaries

Save | Discard | 1/1

Print Approval Letter | Draft | Pending Approval | Approved | Rejected

1 WSP/ATR Sub... | 8 DG Applications

**N000000015**  
**Providence Consultants & Actuaries**

Title	Name	Job Position	Email	Mobile
Hon	Adeline Davids	CEO	skills@inseta.org.za	0113818900
Miss	Bongl Malinga	Skills bass	mandatory@inseta.org.za	0113818900

[Add a line](#)

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

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

Skills | SDF Dashboard | Organisation | WSP/ATR | Test Primary SDF

Organisations / [N000000015] Providence Consultants & Actuaries

Save | Discard | 1/1

Print Approval Letter | Draft | Pending Approval | Approved | Rejected

8 DG Applications

**N000000015**  
**Providence Consultants & Actuaries**

**Create Contact Person**

Title:  | Phone number:

First Name:  | Fax number:

Surname:  | Cell Number:

Initials:  | Email:

Designation:

Postal Address:

Postal Address 1:

Postal Address 2:

Postal Address 3:

Postal Code:

Postal Suburb:

Physical City:  | Urban/Rural:

Postal Municipality:

Save & Close | Save & New | Discard

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



## 6.4 Update CFO details

Title	First Name	Last Name	Email	Cell Number	Fax Number	Email
Miss	Thabo	Manganyi	thabom@inseta.org.za	0113818900		thabom@inseta.org.za

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

Open: CFO




Title	Misj	Phone number	0113818900
First Name	Thabo	Fax number	
Surname	Manganyi	Cell Number	0113818900
Initials	T	Email	thabom@inseta.org.za
Designation	CFO		

Save Discard

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



## 6.5 Update CEO details

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

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





## 6.6 Update Organisation's Banking details

Skills | SDF Dashboard | Organisation | WSP/ATR | Test Primary SDF

Organisations / [N000000015] Providence Consultants & Actuaries

Save | Discard

Print Approval Letter

1 WSP/ATR Sub... | 8 DG Applications

N000000015  
Providence Consultants & Actuaries

Bank Name	Account Type	Accountnumber	Branch Name	Branch Code	Verification Status
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 **Add a line**

Skills | SDF Dashboard | Organisation | WSP/ATR | Test Primary SDF

Organisations / [N000000015] Providence Consultants & Actuaries

Save | Discard

Print Approval Letter

8 DG Applications

**Create Bank Details**

Accountnumber: \_\_\_\_\_ Bank: \_\_\_\_\_

Account Type: \_\_\_\_\_ Branch Name: \_\_\_\_\_

Account Holder: Providence Consultants & Actuaries Branch Code: \_\_\_\_\_

Verification Status: Not Verified

Last Updated by: \_\_\_\_\_

Last Updated on: \_\_\_\_\_

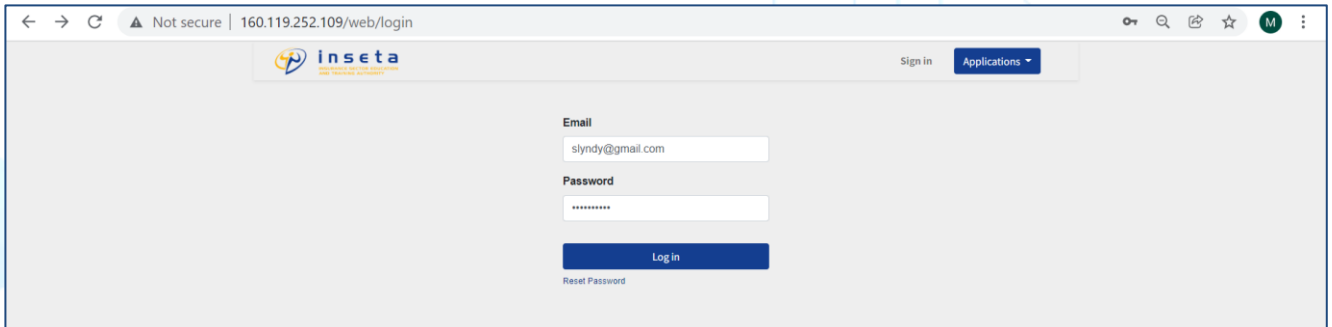
Save & Close | Save & New | Discard


- Capture Banking information
- Click **Save & Close**

## 7 WSP ATR Submission

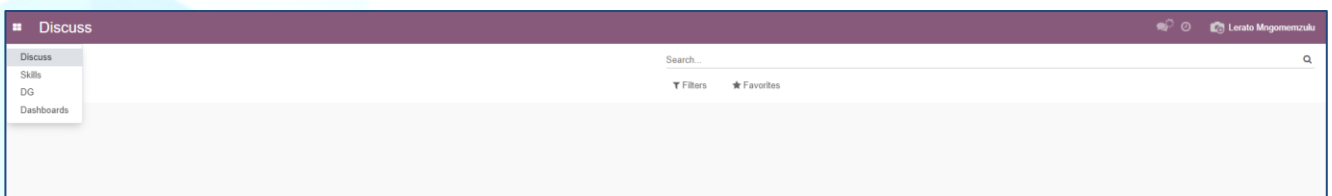
This section provides a guide on WSP & ATR submissions on the system for small organisations. This form requires employers to report on all training interventions that took place in their company in the previous financial year. The employer must report both credit and non-credit bearing interventions

### 7.1 STEP I- System Login

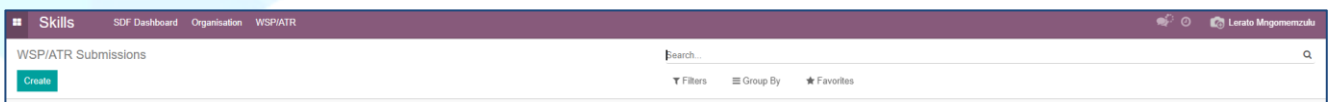


 Login as SDF once application is approved

### 7.2 STEP I- Create WSP



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



 Click **Create**

WSP/ATR Submissions / New

Save Discard

Submit

Draft Pending Validation Pending Assessment Pending Evaluation Approved Rejected

Organisation: [L050811936] CN BROKERS (PTY) LTD  
 SDL No: L050811936  
 Financial Year: 01 April 2021 - 31 March 2022  
 No. Employees: 0  
 Size: Small Levy Paying (1 - 49)  
 Form Type: Small Firms

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

Due Date: 31/12/2021

ATR 1: Implementation report  
 ATR 2: Pivotal trained beneficiaries  
 ATR 3: Hard to fill vacancies  
 ATR 4: Skills Gaps  
 WSP 1: Skills Development & Consultation  
 WSP 2: Current Employment Profile

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.

Import From Template Move To Pivotal

Move To Pivotal	Inserta Funding	Other Funding	Company Funding	AM	AF	AD	CM	CF	CD	IM	IF	ID

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

### 7.3 STEP 2- Implementation Report

Skills SDF Dashboard Organisation WSP/ATR

WSP/ATR Submissions / New

Save Discard

Due Date: 31/12/2021

ATR 1: Implementation report  
 ATR 2: Pivotal trained beneficiaries  
 ATR 3: Hard to fill vacancies  
 ATR 4: Skills Gaps  
 WSP 1: Skills Development & Consultation  
 WSP 2: Current Employment Profile  
 WSP 3: Highest Edix. Profile  
 WSP 4: Provincial Breakdown  
 WSP 5: Pivotal planned  
 WSP 6: Planned Beneficiaries of Training  
 Documents Uploads  
 WSP Submission Status  
 WSP Evaluation  
 Update Employer Contact Details

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.

Import From Template Move To Pivotal

Move To Pivotal	Inserta Funding	Other Funding	Company Funding	AM	AF	AD	CM	CF	CD	IM	IF	ID

Add a line

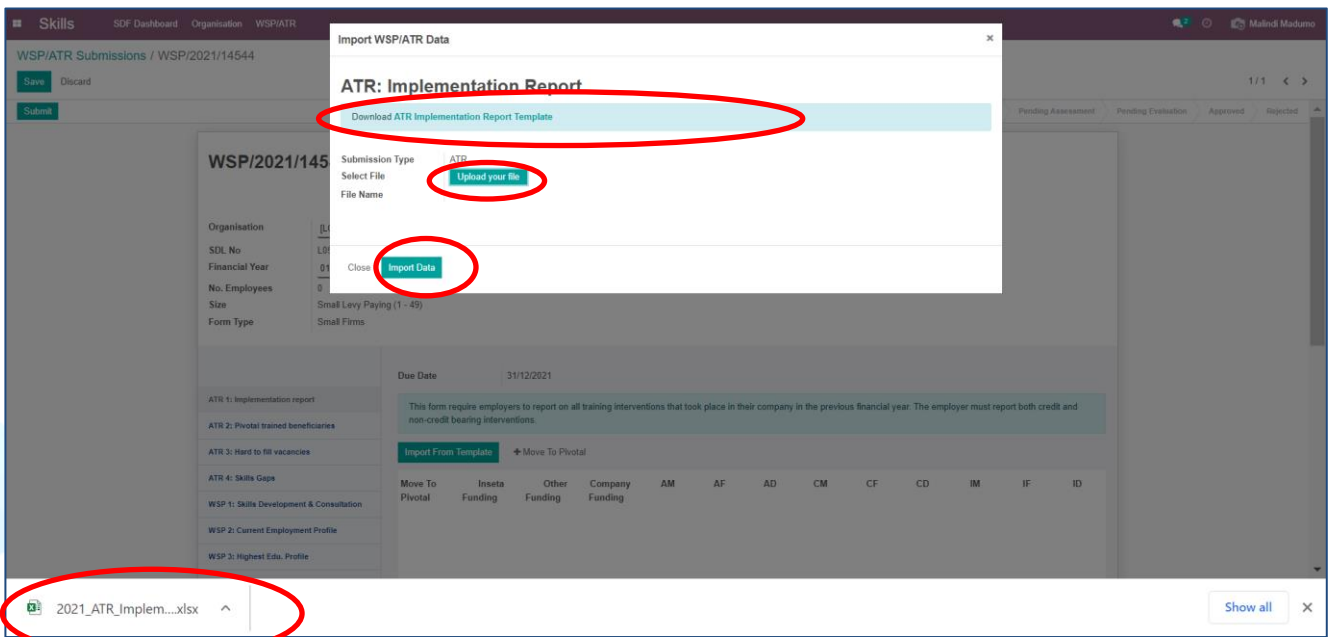
0.00	0.00	0.00	0	0	0	0	0	0	0	0	0	0
------	------	------	---	---	---	---	---	---	---	---	---	---

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

Note:

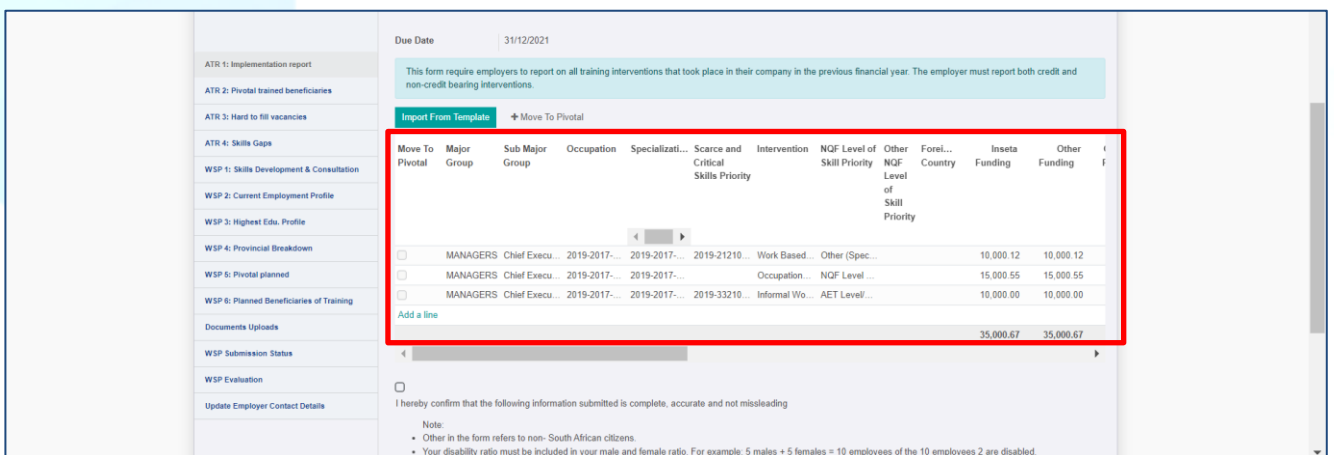
- Other in the form refers to non- South African citizens.
- Your disability ratio must be included in your male and female ratio. For example: 5 males + 5 females = 10 employees of the 10 employees 2 are disabled.
- Other option allows you to report on foreign nationals included in Race gender break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

- ☞ Click on **Implementation report**



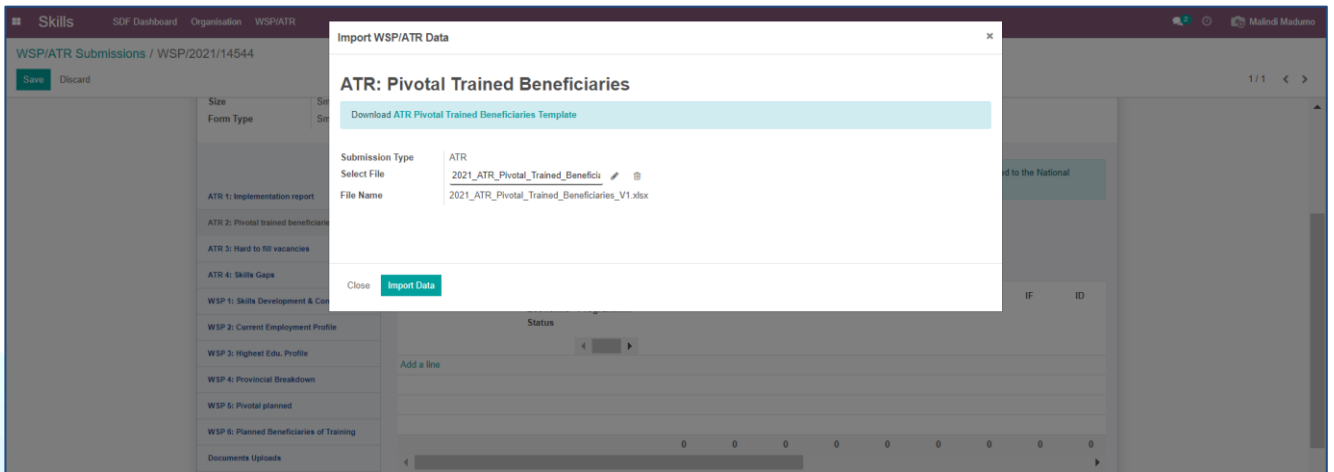
- ☞ Click **Download ATR Implementation Template**
- ☞ On the pop-up screen, Click **Download ATR Implementation Template**
- ☞ The file is downloaded on your machine
- ☞ Click on **Upload file** then browse your machine and select the saved file
- ☞ Click **Import Data**

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



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

## 7.4 STEP 3- Pivotal trained beneficiaries

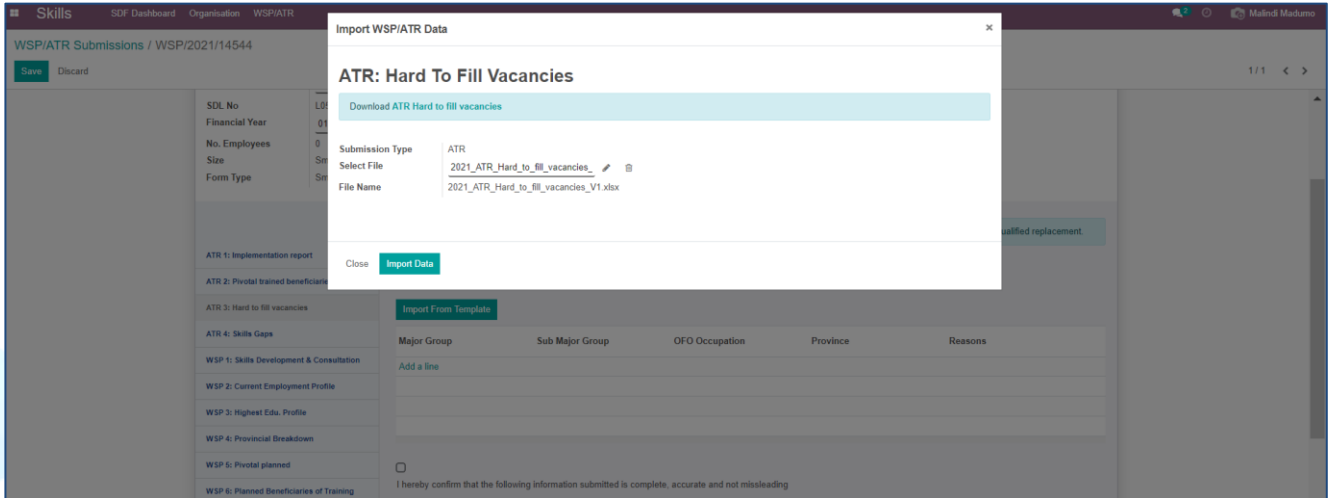


- ☞ Click Download **ATR Pivotal Trained Beneficiaries Template**
- ☞ On the pop-up screen, Click **Download ATR Pivotal Trained Beneficiaries Template** (As shown in STEP 2)
- ☞ The file is downloaded on your machine
- ☞ Click on **Upload file** then browse your machine and select the saved file
- ☞ Click **Import Data**

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

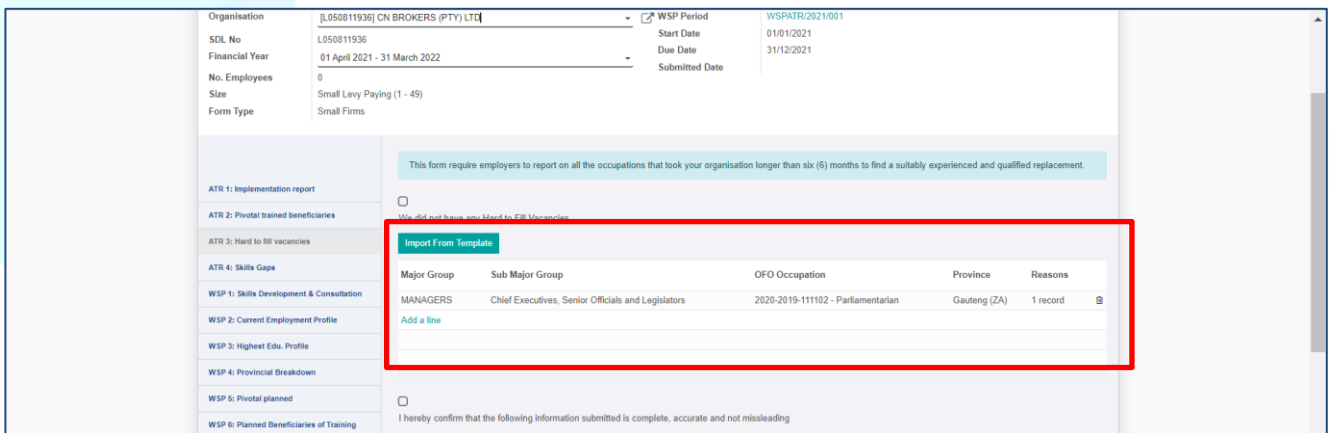
Major Group	Sub major Group	Occupation	Specializati...	Programme Level	Traini...	Pivotal Provider Programme	Socio Economic Status	Start Date	End Date	NQF Level	Municipality	Soc Ecc Sta
MANAGERS	Chief Execu...	2020-2019...	2020-2019...	Advanced	Test 3	50182 - Adv...	UnEmployed	03/01/2014	03/05/2014	Level 03	Amahlathi	Unl
MANAGERS	Chief Execu...	2020-2019...	2020-2019...	Intermediate	Test 2	78767 - Ma...	Employed	02/01/2014	02/05/2014	Level 02	Amahlathi	Em
MANAGERS	Chief Execu...	2020-2019...	2020-2019...	Entry	Test	50182 - Adv...	UnEmployed	01/01/2014	01/05/2014	Level 01	Albert Lut...	Unl

## 7.5 STEP 4- Hard to fill vacancies



- 🖱️ Click **ATR Hard to fill vacancies**
- 🖱️ On the pop-up screen, Click **Download ATR Hard to fill vacancies** (As shown in STEP 2)
- 🖱️ 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



## 7.6 STEP 5- Skills Gap

### Scenario 1

Organisation	[L050811936] CN BROKERS (PTY) LTD	WSP Period	WSPATR/2021/001
SDL No	L050811936	Start Date	01/01/2021
Financial Year	01 April 2021 - 31 March 2022	Due Date	31/12/2021
No. Employees	0	Submitted Date	
Size	Small Levy Paying (1 - 49)		
Form Type	Small Firms		

ATR 1: Implementation report	<input checked="" type="checkbox"/>	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".
ATR 2: Pivotal trained beneficiaries	<input checked="" type="checkbox"/>	We did not have any Hard to Fill Vacancies
ATR 3: Hard to fill vacancies	<input type="checkbox"/>	
ATR 4: Skills Gaps	<input type="checkbox"/>	I hereby confirm that the following information submitted is complete, accurate and not misleading
WSP 1: Skills Development & Consultation		
WSP 2: Current Employment Profile		
WSP 3: Highest Edu. Profile		
WSP 4: Provincial Breakdown		
WSP 5: Pivotal planned		
WSP 6: Planned Beneficiaries of Training		

🖱️ 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

Organisation	[L050811936] CN BROKERS (PTY) LTD	WSP Period	WSPATR/2021/001
SDL No	L050811936	Start Date	01/01/2021
Financial Year	01 April 2021 - 31 March 2022	Due Date	31/12/2021
No. Employees	0	Submitted Date	
Size	Small Levy Paying (1 - 49)		
Form Type	Small Firms		

ATR 1: Implementation report	<input type="checkbox"/>	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".																								
ATR 2: Pivotal trained beneficiaries	<input type="checkbox"/>	We did not have any Hard to Fill Vacancies																								
ATR 3: Hard to fill vacancies	<input type="checkbox"/>																									
ATR 4: Skills Gaps	<input type="checkbox"/>	<table border="1"> <thead> <tr> <th>Manager Gap 1</th> <th>Manager Gap 2</th> <th>Manager Gap 3</th> <th>Professionals Gap 1</th> <th>Professionals Gap 2</th> <th>Professionals Gap 3</th> </tr> </thead> <tbody> <tr> <td colspan="6">Add a line</td> </tr> <tr> <td colspan="6"> </td> </tr> <tr> <td colspan="6"> </td> </tr> </tbody> </table>	Manager Gap 1	Manager Gap 2	Manager Gap 3	Professionals Gap 1	Professionals Gap 2	Professionals Gap 3	Add a line																	
Manager Gap 1	Manager Gap 2	Manager Gap 3	Professionals Gap 1	Professionals Gap 2	Professionals Gap 3																					
Add a line																										
WSP 1: Skills Development & Consultation																										
WSP 2: Current Employment Profile																										
WSP 3: Highest Edu. Profile																										
WSP 4: Provincial Breakdown																										
WSP 5: Pivotal planned																										
WSP 6: Planned Beneficiaries of Training																										

🖱️ Untick the Checkbox

🖱️ Click on **Add a line** to edit data

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	Supervisory	New Technology
	3	Production	New policy
Professionals	1		
	2		
	3	Project Management	New work processes
Technicians and Associate Professionals	1		
	2		
	3		
Clerical Support	1	Problem-solving	Lack of relevant experience
	2		
	3	Office Administration	New work processes
Service and Sales Workers	1		
	2		
	3		
Skilled Agriculture, Forestry, Fishery, Craft and Related Trades Workers	1		
	2		
	3		

- Capture Skills Gap
- Click **Save & Close**

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

WSP/ATR Submissions / WSP/2021/14544

Save Discard

Organisation: [L050811936] CN BROKERS (PTY) LTD | WSP Period: WSPATR/2021/001

SDL No: L050811936 | Start Date: 01/01/2021

Financial Year: 01 April 2021 - 31 March 2022 | Due Date: 31/12/2021

No. Employees: 0 | Submitted Date: [ ]

Size: Small Levy Paying (1 - 49)

Form Type: Small Firms

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...	Supervisory	Production		Project Management	

Add a line

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



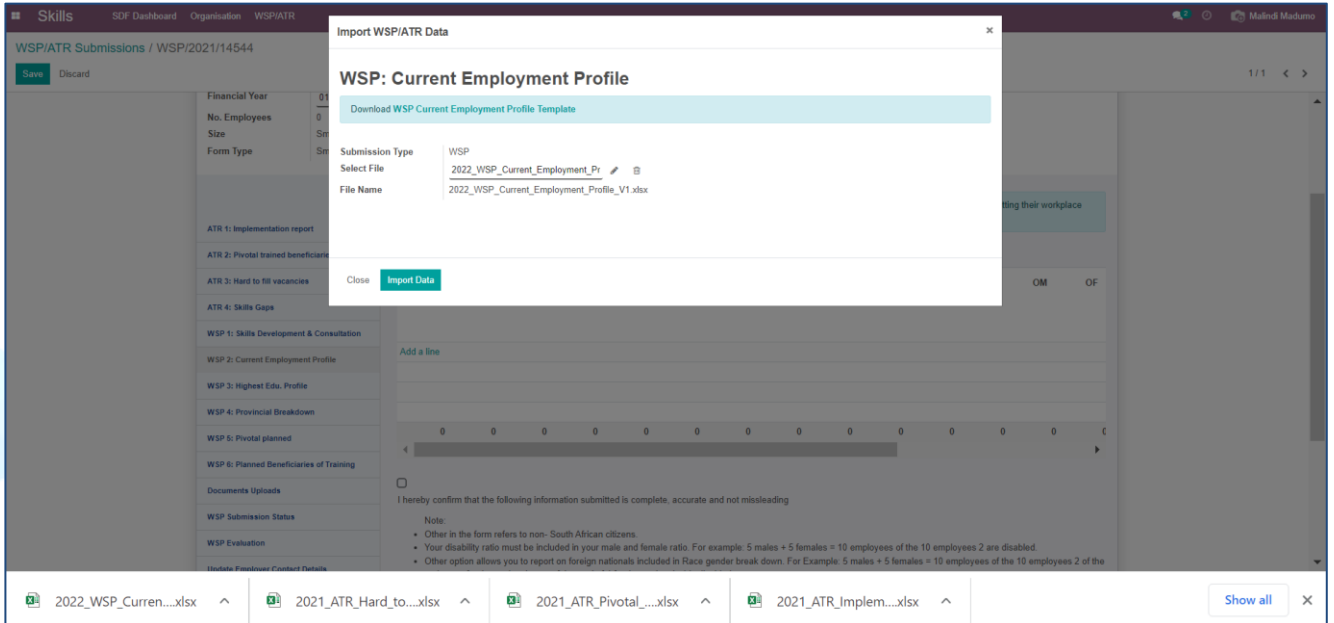
## 7.7 STEP 6- Skills Development & Consultation

- 🖱️ 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

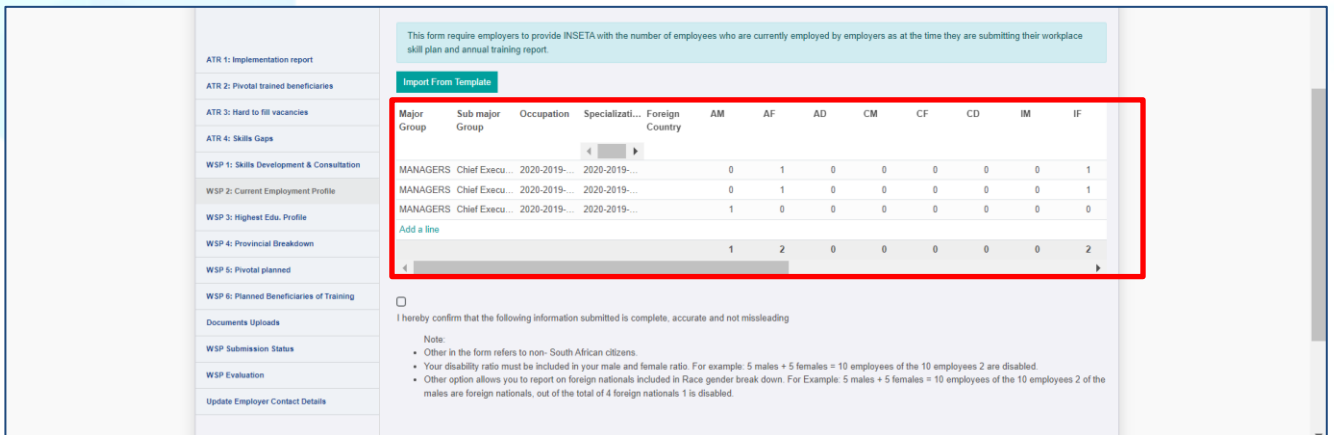
- 🖱️ Check the declaration tick-box

## 7.8 STEP 7- Current Employment Profile

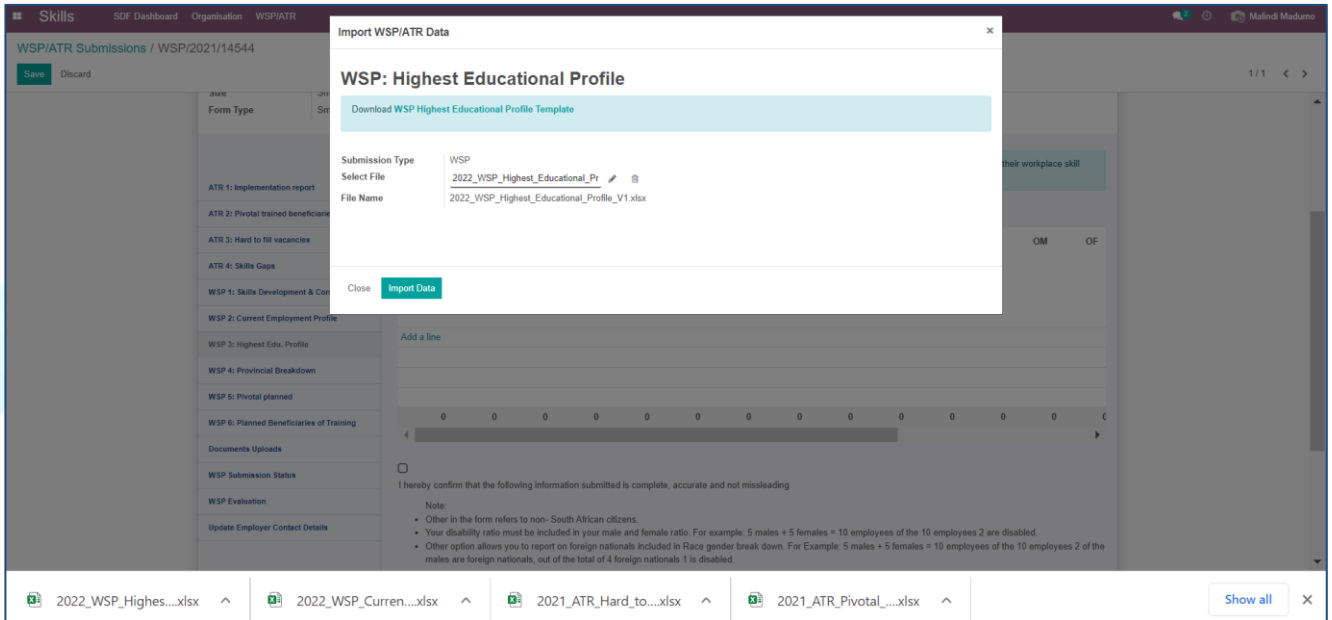


- 🖱️ Click **Current Employment Profile**
- 🖱️ On the pop-up screen, Click **Download Current Employment Profile** (As shown in STEP 2)
- 🖱️ The file is downloaded on your machine
- 🖱️ Click on **Upload file** then browse your machine and select the saved file
- 🖱️ Click **Import Data**

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



## 7.9 STEP 8- Highest Educational Profile



- 🖱️ Click **Highest Educational Profile**
- 🖱️ On the pop-up screen, Click **Download Highest Educational Profile** (As shown in STEP 2)
- 🖱️ 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



## 7.10 STEP 9- Provincial Background

🖱️ Click **Provincial Background**

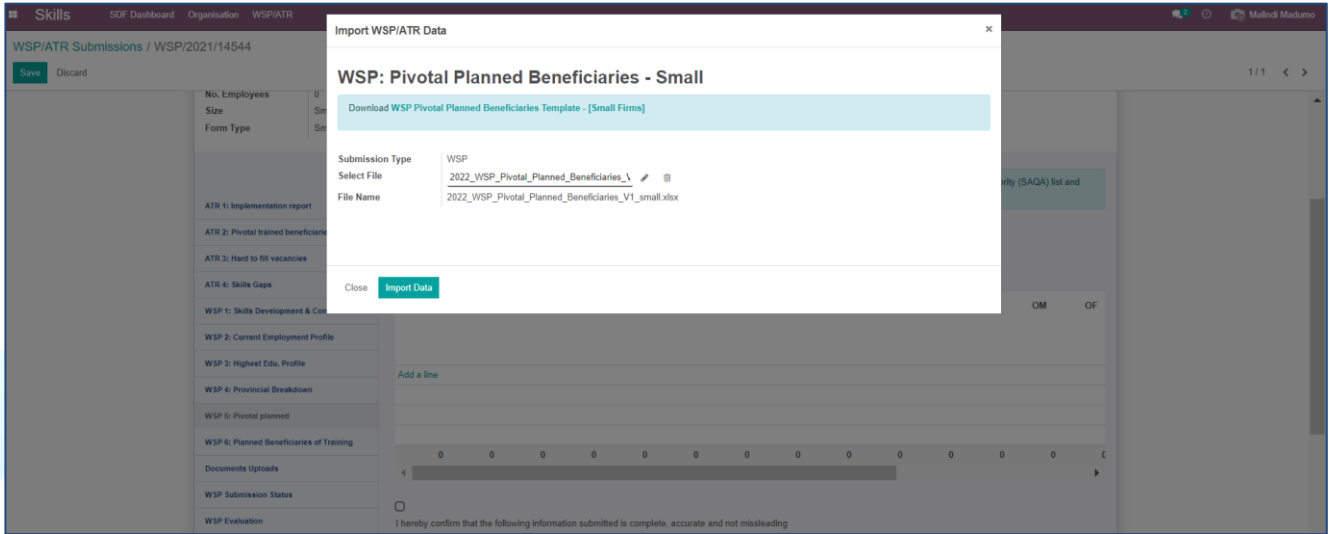
The file system autopopulates this section based on the company information provided

To validate the information,

🖱️ Click on **the populated line item to edit**

🖱️ Validate the data and then Click Save

## 7.11 STEP 10- Pivotal Planned



- 🖱️ Click **Pivotal Planned**
- 🖱️ On the pop-up screen, Click **Download Pivotal Planned** (As shown in STEP 2)
- 🖱️ 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 provide INSETA with a plan on all planned training interventions that are listed on the South African Qualifications Authority (SAQA) list and are aligned to the National Qualification Framework (NQF) for the current financial year.

We did not host any PIVOTAL programmes

**Import From Template**

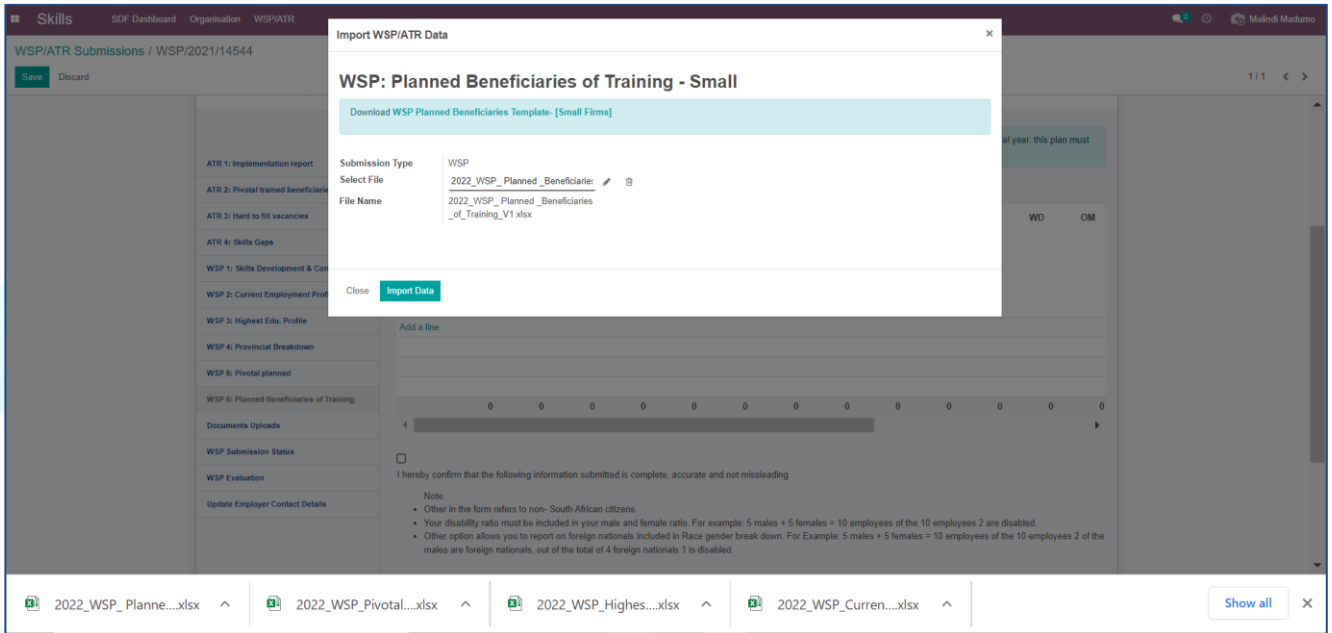
Major Group	Sub major Group	Occupation	Specializati...	Municipality	Pivotal Programme	Socio Economic Status	Foreign Country	AM	AF	AD	CM	CF
MANAGERS	Chief Execu...	2020-2019-...	2020-2019-...	Amahlathi	50182 - Adv...	UnEmployed		0	1	0	0	0
MANAGERS	Chief Execu...	2020-2019-...	2020-2019-...	Amahlathi	78767 - Ma...	Employed		0	1	0	0	0
MANAGERS	Chief Execu...	2020-2019-...	2020-2019-...	Albert Luthuli	50182 - Adv...	UnEmployed		1	0	0	0	0
								1	2	0	0	0

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

Note:

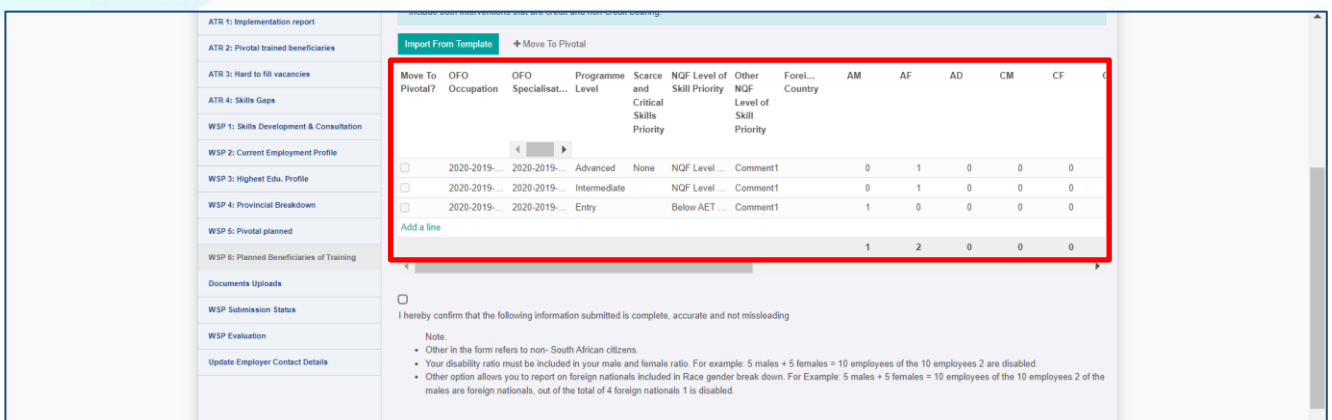
- Other in the form refers to non- South African citizens.
- Your disability ratio must be included in your male and female ratio. For example: 5 males + 5 females = 10 employees of the 10 employees 2 are disabled
- Other option allows you to report on foreign nationals included in Race gender break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

## 7.12 STEP 11- Planned Beneficiaries of Training



- 🖱️ Click **Planned Beneficiaries of Training**
- 🖱️ On the pop-up screen, Click **Download Planned Beneficiaries of Training** (As shown in STEP 2)
- 🖱️ 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?	OFO Occupation	OFO Specialisat...	Programme Level	Scarce and Critical Skills Priority	NQF Level of Skill Priority	Other NQF Level of Skill Priority	Fore... Country	AM	AF	AD	CM	CF
<input type="checkbox"/>	2020-2019-...	2020-2019-...	Advanced	None	NQF Level ...	Comment1		0	1	0	0	0
<input type="checkbox"/>	2020-2019-...	2020-2019-...	Intermediate		NQF Level ...	Comment1		0	1	0	0	0
<input type="checkbox"/>	2020-2019-...	2020-2019-...	Entry	Below AET ...	Comment1			1	0	0	0	0
Add a line								1	2	0	0	0

## 7.13 STEP 12- 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**

Financial Year: 01 April 2021 - 31 March 2022

Document Type: Authorisation Page

Select File: code\_of\_conduct.pdf

File Name: code\_of\_conduct.pdf

Comment:

Buttons: Save & Close, Save & New, Discard

- 🖱️ Click Add line to upload required documents
- 🖱️ Select Document Type
- 🖱️ Select and Upload File
- 🖱️ Click Save & Close

The required documents are successfully uploaded

The following documents are mandatory and MUST be uploaded:

- Authorisation Page
- Banking Details
- FSP License

Document Relates to	Financial Year	File Name
Authorisation Page	01 April 2021 - 31 March 2022	code_of_conduct.pdf
Banking Details	01 April 2021 - 31 March 2022	code_of_conduct.pdf
FSP License	01 April 2021 - 31 March 2022	code_of_conduct.pdf
Add a line		

## 7.14 STEP 13- 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...	[N00007710] Nali Test Org 2	N00007710	Small Firms	01 April 2022 - 31 March 2023	WSPATR/2021/001	01/31/2022				01/06/2022 12:56:59	Nali Bophela	Draft
WSP/2021/146...	[N000000015] Providence Consultants & Actuaries	N000000015	Small Firms	01 April 2022 - 31 March 2023	WSPATR/2021/001	01/31/2022	12/07/2021 02:00:00			12/07/2021 14:01:45	TEST PRIMARY SDF	Approved
WSP/2021/146...	[N00007708] GAUTENG TEST	N00007708	Small Firms	01 April 2022 - 31 March 2023	WSPATR/2021/001	01/31/2022	12/06/2021 02:00:00			12/03/2021 14:31:34	TEST PRIMARY S...	Pending Assessment
WSP/2021/146...	[N130015030] INSETA Test	N130015030	Small Firms	01 April 2021 - 31 March 2022		04/30/2021	01/27/2021 02:00:00			11/10/2021 17:08:25	Administrator	Draft
WSP/2021/146...	[N130014977] Cape Town Test 2018 Med and Lar	N130014977	Large/Medi...	01 April 2021 - 31 March 2022		04/30/2021	01/27/2021 02:00:00			11/10/2021 17:08:25	Administrator	Draft
WSP/2020/146...	[N130014977] Cape Town Test 2018 Med and Lar	N130014977	Large/Medi...	01 April 2016 - 31 March 2017		04/30/2016				11/10/2021 17:08:25	Administrator	Draft

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

WSP/ATR Submissions / WSP/2021/14692

Print

Authorization Page  
ATR Report  
WSP Report  
WSP & ATR Report

WSP/2021/14692

Organisation: [N000000015] Providence Consultants & Actuaries  
 SDL No: N000000015  
 Financial Year: 01 April 2022 - 31 March 2023  
 No. Employees: 0  
 Size: Small Non-Levy Paying (1 - 49)  
 Form Type: Small Firms

WSP Period: WSPATR/2021/001  
 Start Date: 12/01/2021  
 Due Date: 01/31/2022  
 Submitted Date: 12/07/2021 02:00:00

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

WSP/ATR Submissions / WSP/2021/14692

Print

Authorization Page  
ATR Report  
WSP Report  
WSP & ATR Report

WSP/2021/14692

Organisation: [N000000015] Providence Consultants & Actuaries  
 SDL No: N000000015  
 Financial Year: 01 April 2022 - 31 March 2023  
 No. Employees: 0  
 Size: Small Non-Levy Paying (1 - 49)  
 Form Type: Small Firms

Due Date: 01/31/2022

ATR 1: Implementation report  
 ATR 2: Pivotal trained beneficiaries  
 ATR 3: Hard to fill vacancies  
 ATR 4: Skills Gaps

WSP 1: Skills Development & Consultation  
 WSP 2: Current Employment Profile  
 WSP 3: Highest Edu. Profile

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.

Import From Template + Move To Pivotal

Move To Pivotal	Major Group	Sub Major Group	Occupation	Specializati...	Scarce and Critical Skills Priority	Intervention	NQF Level of Skill Priority	Other NQF Level of Skill Priority	Forei... Country	Inseta Funding	Other Funding

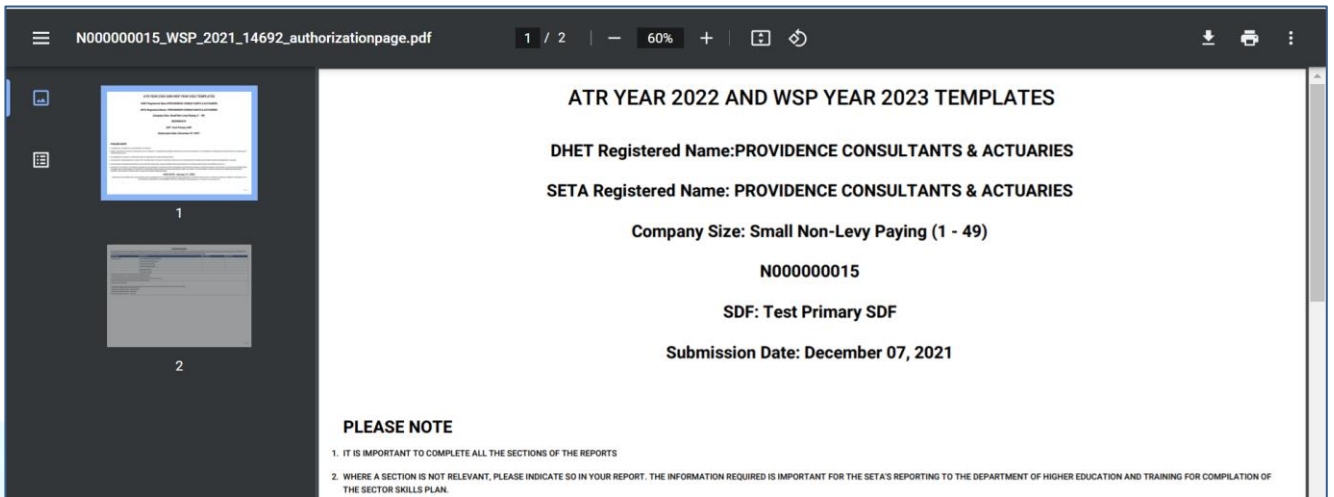
N000000015\_WSP...pdf

Show all

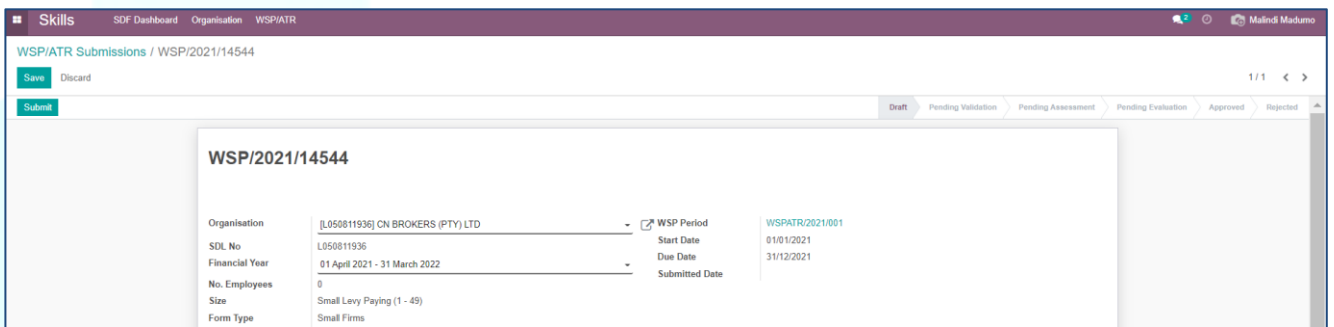
The Authorisation page is downloaded on the local machine

- Double click on document to open

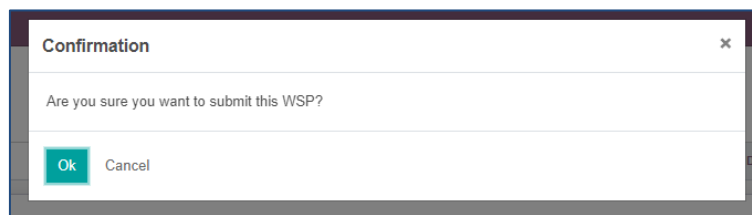




## 7.15 STEP 14- WSP Submission

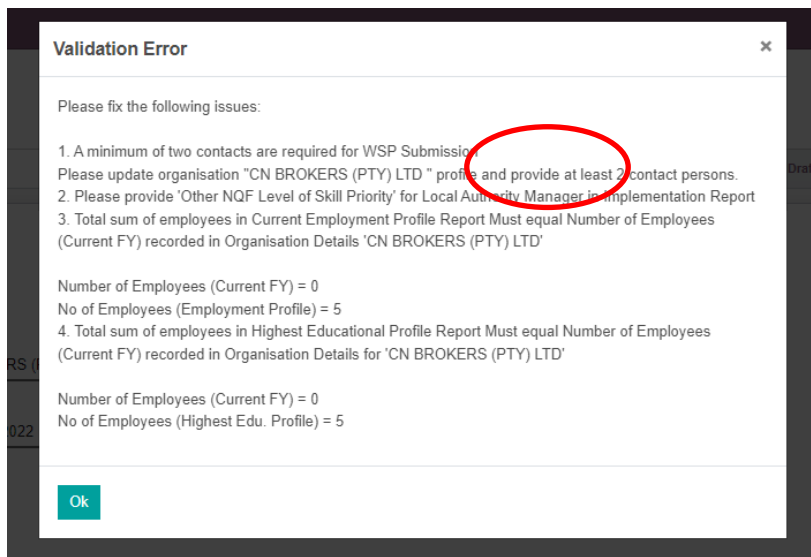


☞ Once all data is capture and documents are uploaded, Click on **Submit**

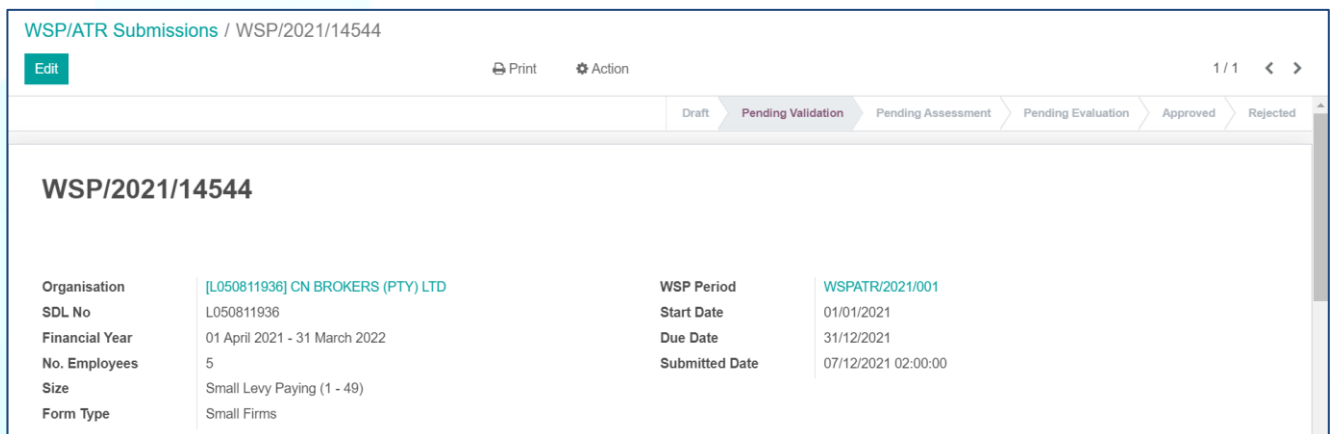


☞ Click **Ok** on the pop-up screen to confirm

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



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



☞ 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**