



inseta
INSURANCE SECTOR EDUCATION
AND TRAINING AUTHORITY

INSETA

Discretionary Grants Online Application

2019/2020

Training Manual



Contents

1	INTRODUCTION.....	3
2	Online Application: 2019/2020 Discretionary Grants Applications.....	3
2.1	Accessing the system.....	3
2.2	Starting the application	4
2.2.1	Learnerships DG Application	5
2.2.2	Internship DG Application.....	7
2.2.3	Bursary for Workers DG Application.....	11
2.2.4	Skills programmes for Workers DG Application.....	14

1 INTRODUCTION

This training manual outlines the steps to be followed for stakeholders to apply online for Discretionary Grants.

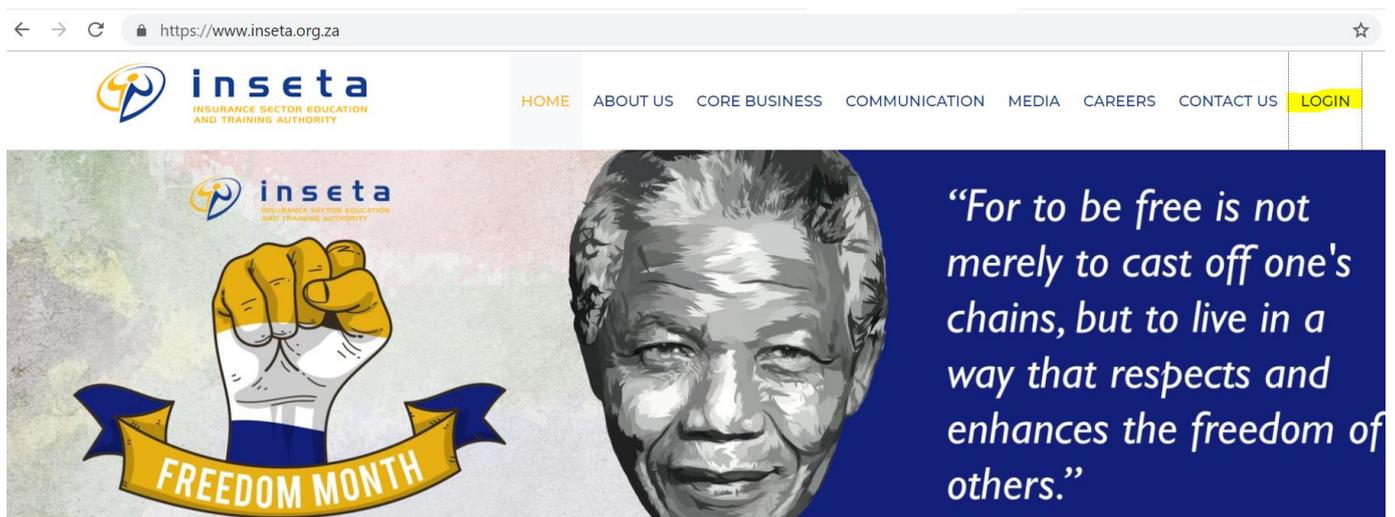
2 Online Application: 2019/2020 Discretionary Grants Applications

Preconditions

1. A user needs to be an approved primary SDF
2. SDF should be linked to an organization with a WSP that is on submitted status for the financial year
3. SDF should have internet access

2.1 Accessing the system

1. The online applications system is accessed from INSETA's website: <https://www.inseta.org.za/> on the "Login" tab.



2. Enter your username and password

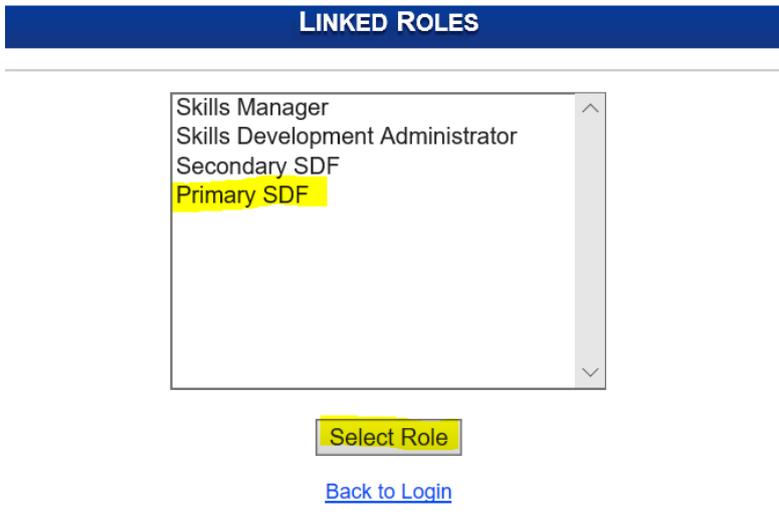
Username:

Password:

Login

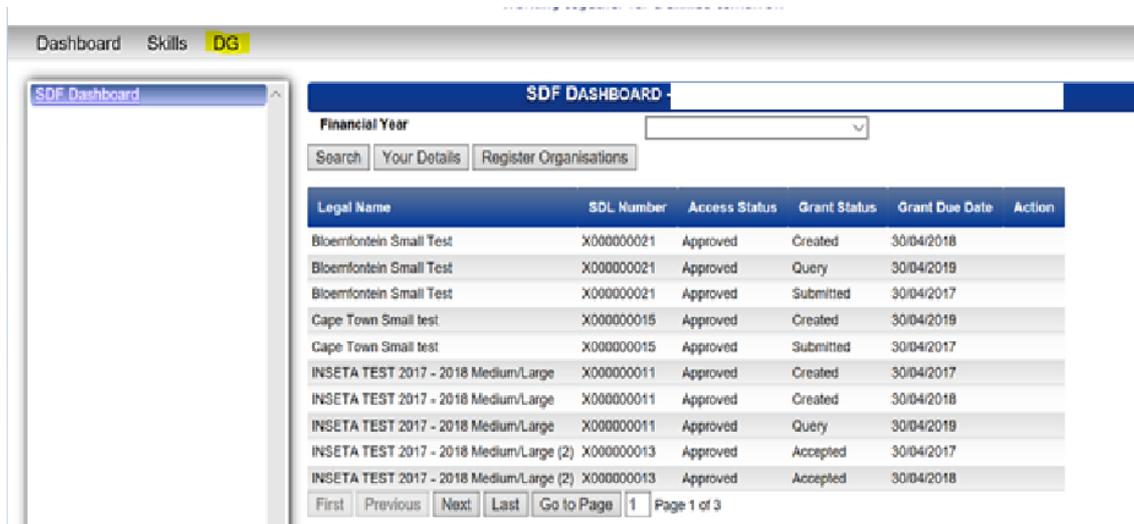
[Forgot Password](#)

3. Select "Primary SDF" from linked roles



2.2 Starting the application

1. After selecting the primary SDF role, the system will open up a SDFG dashboard, from the menu, select "DG"



2. Enter the details for the organization you are applying for, then click on "search" then "action" once the organization details get returned.

ORGANISATION						
Legal Name	<input type="text"/>					
Trade Name	<input type="text"/>					
SDL Number	X000000011					
SIC Code	<input type="text"/>					
<input type="button" value="Search"/>						
Legal Name	Trade Name	SDL Number	SIC Code	Parent SDL Number	Action	
INSETA TEST 2017 - 2018 Medium/Large	INSETA TEST 2017 - 2018 Medium/Large	X000000011			<input type="button" value="Action"/>	
<input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Last"/> <input type="button" value="Go to Page"/> <input type="text" value="1"/> <input type="button" value="Page 1 of 1"/>						

Once you have clicked the "action" icon, you will be taken to the application screen.

2.2.1 Learnerships DG Application

1. Select financial year, and grant type, then click on create

DG APPLICATION - INSETA TEST 2017 - 2018 MEDIUM/LARGE (X000000011)	
<input type="button" value="View"/>	
Financial Year: <input type="text" value="01 April 2019 – 31 March 2020"/>	Type: <input type="text" value="Learnership"/> <input type="button" value="Create"/>
No Records have been found for your search...	

2. The application shell for the selected grant type will get displayed after clicking on the create button, you will have the option to view, or delete the shell. The delete option will not be available once the application is on submitted status.

Click on the shell, then click the view button to capture the application details

DG APPLICATION - INSETA TEST 2017 - 2018 MEDIUM/LARGE (X000000011)							
<input type="button" value="View"/>							
Financial Year: <input type="text" value="01 April 2019 – 31 March 2020"/>		Type: <input type="text" value="Learnership"/>		<input type="button" value="Create"/>			
Financial Year	Submission Number	DG Type	DG Status	Due Date	Submitted Date	Approved Date	Rejected Date
01 April 2019 – 31 March 2020	DG/LRN/2019-2020/00002	Learnership	Pending	30/06/2019			
<input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Last"/> <input type="button" value="Go to Page"/> <input type="text" value="1"/> <input type="button" value="Page 1 of 1"/>							

3. The application menu will be returned after clicking on the view button; to complete or view each form, click on the select button

Main Page		DG Application Forms 01 April 2019 – 31 March 2020		INSETA TEST 2017 - 2018 MEDIUM/LARGE - X000000011	
					Submit DG Application
#	Form	Description	Due Date	Select	
1.	1	Organisation Details	30/06/2019	Select	
2.	2	Contact Person Details	30/06/2019	Select	
3.	3	Learnership Details	30/06/2019	Select	

a. Organization Details

These details read from the submitted WSP details and are therefore view only, to navigate back to the other forms, click on "Back to DG Forms Menu"

Back to DG Forms Menu	Organisation Details
SDL Number	X000000011
Company Name	INSETA TEST 2017 - 2018 Medium/Large
Company Size	Medium (50 - 149)
Company Registration Number	2001/00345678/078
SIC Code	Activities auxiliary to Financial Intermediation
Physical Code	2470
Physical Address Line 1	2223 ext 1
Physical Address Line 2	Vukuzakhe Location
Physical Address Line 3	Volksrust
Physical Suburb	Jubapark
Physical Municipality	Pixley Ka Seme
Physical Urban Rural	Urban
Physical Province	Western Cape
Postal Code	2470
Postal Address Line 1	
Postal Address Line 2	
Postal Address Line 3	
Postal Suburb	Jubapark
Postal Municipality	Pixley Ka Seme
Postal Urban Rural	Urban
Postal Province	Western Cape
Organisation Tel Number	
Organisation Email	
Organisation Website	

b. Company Contact Person

Under this section, capture the company contact person details, not those of the SDF. Once the contact details have been captured, click on the "Add" button", the captured contact details will then be saved. User can capture more than one.

To navigate back to the other forms, click on "back to DG Forms Menu"

Back to DG Forms Menu	Contact Person Details
Title	Ms
Person Name	Test
Person Surname	Contact
Person ID Number	AD12345
Person Email Address	badoro@webmail.com
Telephone Number	0113331234
Cell Number	0723453333
Add	

c. Learnership Details

The learnerships application details are captured on this form.

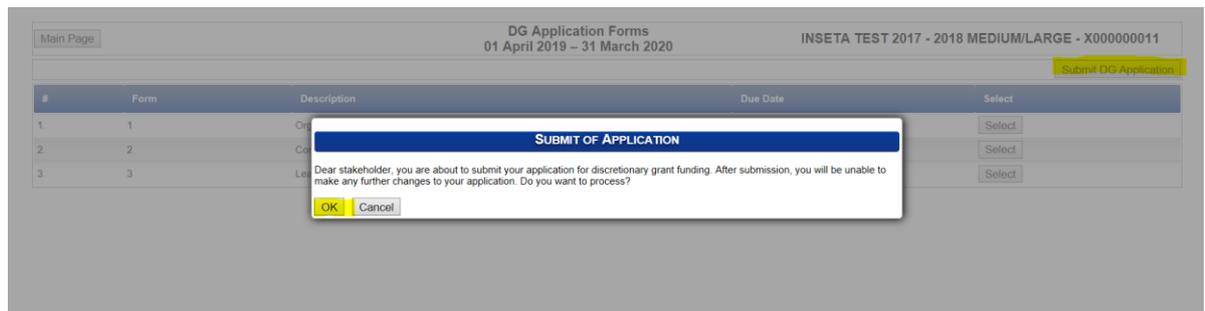
- All fields that are marked as “required” are compulsory
- A user can create more that one learnership application
- The system will not allow duplications of applications if the learnership, province, and number of learners are the same

Funding Type	<input type="text"/>	*Required
Learnership	<input type="text"/>	
Other Learnership	<input type="text"/>	
Other Learnership Code	<input type="text"/>	
Socio Economic Status	<input type="text"/>	*Required
Province	<input type="text"/>	*Required
Provider	<input type="text"/>	
Other Provider	<input type="text"/>	
Provider Scope Expiry Date	<input type="text"/>	
Commencement Date	<input type="text"/>	*Required
Completion Date	<input type="text"/>	*Required
Total Number of Learners	<input type="text" value="0"/>	
Disabled	<input type="text" value="0"/>	
First Time Applicant	<input type="text"/>	*Required

d. Submit application

To submit the application, click on “Back to DG Form Menu”, then click the “Submit DG Application” button, and confirm that the application can be sent.

- You can log out of the application and log back in at a later stage to continue with the application before submitting it.
- Once the application has been submitted, SDF will receive a notification email on the email address that is captured on the SDF profile
- An application on submitted status cannot be deleted or edited, ensure that everything has been captured before clicking the “submit application” button



2.2.2 Internship DG Application

1. Select financial year, and grant type, then click on create.
2. The application shell for the selected grant type will get displayed after clicking on the create button, you will have the option to view, or delete the shell. The delete option will not be available once the application is on submitted status.

Click on the shell, then click the view button to capture the application details

DG APPLICATION - INSETA TEST 2017 - 2018 MEDIUM/LARGE (X000000011)

View

Financial Year: Type:

Financial Year	Submission Number	DG Type	DG Status	Due Date	Submitted Date	Approved Date	Rejected Date
01 April 2019 – 31 March 2020	DG/LRN/2019-2020/00002	Learnership	Submitted	30/06/2019	03/26/2019		
01 April 2019 – 31 March 2020	DG/INT/2019-2020/00003	Internship	Pending	30/06/2019			

- The application menu will be returned after clicking on the view button; to complete or view each form, click on the select button

Main Page		DG Application Forms 01 April 2019 – 31 March 2020		INSETA TEST 2017 - 2018 MEDIUM/LARGE - X000000011	
#	Form	Description	Due Date	Select	
1.	1	Organisation Details	30/06/2019	<input type="button" value="Select"/>	
2.	2	Contact Person Details	30/08/2019	<input type="button" value="Select"/>	
3.	3	Lead Employer Details	30/06/2019	<input type="button" value="Select"/>	
4.	4	Intended Programme Details	30/06/2019	<input type="button" value="Select"/>	
5.	5	Details of the Intern or Work-based Experience Candidate/s	30/06/2019	<input type="button" value="Select"/>	
6.	6	Declaration of Lead Employer	30/08/2019	<input type="button" value="Select"/>	

a. Organization details

These details read from the submitted WSP details and are therefore view only, to navigate back to the other forms, click on "Back to DG Forms Menu"

Back to DG Forms Menu	Organisation Details
SDL Number	X000000011
Company Name	INSETA TEST 2017 - 2018 Medium/Large
Company Size	Medium (50 - 149)
Company Registration Number	2001/00345678/078
SIC Code	Activities auxiliary to Financial Intermediation
Physical Code	2470
Physical Address Line 1	2223 ext 1
Physical Address Line 2	Vukuzakhe Location
Physical Address Line 3	Valksrust
Physical Suburb	Jubapark
Physical Municipality	Pixley Ka Seme
Physical Urban Rural	Urban
Physical Province	Western Cape
Postal Code	2470
Postal Address Line 1	
Postal Address Line 2	
Postal Address Line 3	
Postal Suburb	Jubapark
Postal Municipality	Pixley Ka Seme
Postal Urban Rural	Urban
Postal Province	Western Cape
Organisation Tel Number	
Organisation Email	
Organisation Website	

b. Company Contact Person

Under this section, capture the company contact person details, not those of the SDF. Once the contact details have been captured, click on the "Add" button, the captured contact details will then be saved. User can capture more than one.

To navigate back to the other forms, click on "back to DG Forms Menu"

Back to DG Forms Menu		Contact Person Details
Title	Ms	
Person Name	Test	
Person Surname	Contact	
Person ID Number	AD12345	
Person Email Address	badoro@webmail.com	
Telephone Number	0113331234	
Cell Number	0723453333	

Add

c. Lead Employer Details

This form is view only, the details populate from the organization that the SDF is linked to except for the below fields:

- Are your company details up to date
- Company business enterprise size
- List the training providers involved

Back to DG Forms Menu		Lead Employer Details	INSETA TEST 2017 - 2018 MEDIUMLARGE - X000000011							
Legal name of Lead Employer										*Required
Trading name if different from above										*Required
Physical Address										*Required
Postal Address										*Required
SARS - SDL Number										*Required
Company/Close Corporation/Partnership/Sole Trader Registration number										*Required
Are your skills levy payments up to date										*Required
Company/business enterprise size										*Required
List the Training Providers Involved in this Internship and/or Work-based Experience, if applicable										
Details of Contact Person		Programme Co-ordinator	Tel. Number (w)	Mobile Number	Fax Number	E-mail Address				

Add

d. Intended Programme Details

The intended programme details are captured on this form. All fields marked as "required" are compulsory.

Once the required information has been captured, click the "add" button to save the details, and the "back to DG Forms Menu" to go back to the other forms

Back to DG Forms Menu Intended Programme Details INSETA TE

Name of the Programme	<input type="text"/>	*Required
Programme Proposed Commencement Date	<input type="text"/>	*Required
Programme Proposed End Date	<input type="text"/>	*Required
Duration of proposed Internship and Work-based Experience	<input type="text"/>	*Required
Source/Critical Skill	<input type="text"/>	

Add

e. Details of the Intern or Work-based Experience Candidate/s

Details of the Intern or Work-based Experience Candidate/s: Proposed Equity Targets in terms of race groups of Interns selected for this Internship or Work -based Experience are captured on this form. Once the required information has been captured, click the "add" button to save the details, and the "back to DG Forms Menu" to go back to the other forms

Back to DG Forms Menu Details of the Intern or Work-based Experience Candidate/s INSETA TEST 2017 - 2018 MEDIUM/LARGE - X000000011

What is the highest qualification of the Interns or Work-based Experience Candidates?

How many Interns/WBE candidates do you anticipate employing upon completion of this Internship and Work-based Experience?

African		Coloured				Indian/Asian				White			
M	F	M	F	M	F	M	F	M	F	M	F		
0	0	0	0	0	0	0	0	0	0	0	0	0	0

Add

Race and Gender Breakdown: Total count of records needs to be greater than 0. Record has not been added.

Edit Remove Remove All

What is the highest qualification of the Interns or Work-based Experience Candidates?	How many Interns/WBE candidates do you anticipate employing upon completion of this Internship and Work-based Experience?	African Male	African Female	African Disabled	Coloured Male	Coloured Female	Coloured Disabled	Indian Male	Indian Female	Indian Disabled	White Male	White Female	White Disabled	Total Male	Total Female	Total Disabled	Grand Total
Degree	2	1	4	0	0	0	0	0	0	0	0	1	0	1	5	0	6
Subtotal		1	4	0	0	0	0	0	0	0	0	1	0	1	5	0	6
Grand Total		1	4	0	0	0	0	0	0	0	0	1	0	1	5	0	6

First Previous Next Last Go to Page 1 Page 1 of 1

f. Declaration of Lead Employer

The declaration details are captured on this form, then a pdf document downloadable.

The downloaded declaration form should be signed, and uploaded under document uploads >> internship declaration form

Back to DG Forms Menu Declaration of Lead Employer INSETA TEST 2017 - 2018 SMALL - X000000010

*It is an offence in terms of the Skills Development Act of 1998 to provide false or misleading information in this Application
 *Your application will be rejected should false or misleading information be found in this application
 *INSETA reserves the right to verify the documented responses

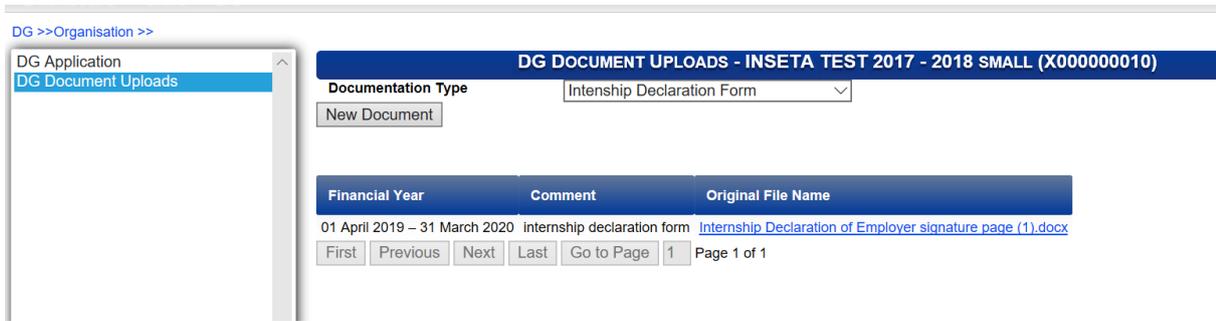
I/We declare that the information provided is correct and according to my /our knowledge, the signatories have the authority to bind the company accordingly. Furthermore I/we have satisfied myself/ourselves to the nature and regulations governing the proposed Internship and/or Work-based Experience Grants from reading the INSETA Internships/WBE Funding Policy

Should the Intern terminate the program, the Applicant must cease to pay the Intern's stipend and submit a Termination report to the INSETA, signed by the Intern and the Internship/ Work-based Experience Coord

Should the Applicant want to pay the Intern /Work-based Experience Candidate an amount in addition to the stipend paid by INSETA, they are at liberty to contract with the Intern/Work-based Experience Candidate

Please download the [Internship Declaration Form](#), sign it and upload it on the document upload section. Note, you will not be able to submit your application if the Declaration form is not uploaded.

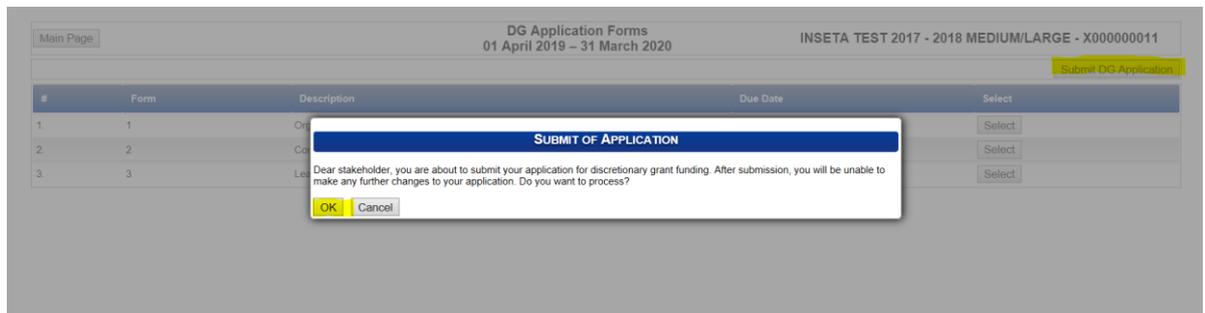
Name of Representative (Who has the authority to bind the company)	<input type="text"/>
Surname of Representative (Who has the authority to bind the company)	<input type="text"/>
Signature of Representative	<input type="checkbox"/>
Representative Date	<input type="text"/>
Witness Name	<input type="text"/>
Witness Surname	<input type="text"/>
Witness Signature	<input type="checkbox"/>
Witness Date	<input type="text"/>



g. Submit application

To submit the application, click on “Back to DG Form Menu”, then click the “Submit DG Application” button and confirm that the application can be sent.

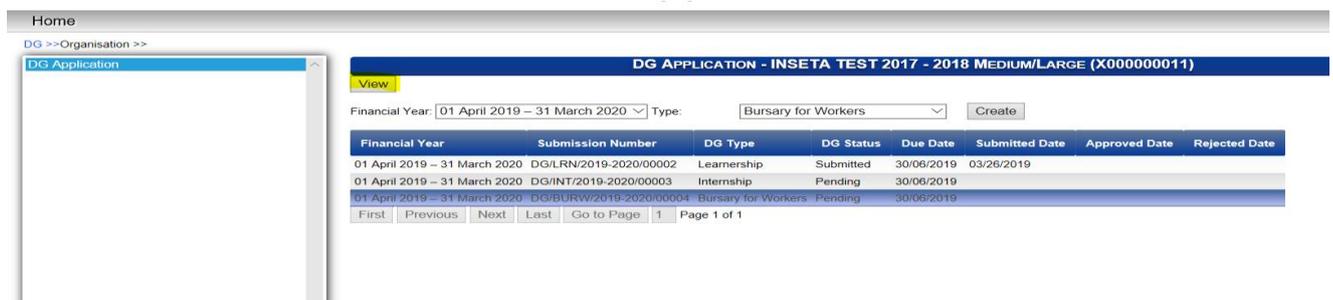
- You can log out of the application and log back in at a later stage to continue with the application before submitting it.
- Once the application has been submitted, SDF will receive a notification email on the email address that is captured on the SDF profile
- An application on submitted status cannot be deleted or edited, ensure that everything has been captured before clicking the “submit application” button



2.2.3 Bursary for Workers DG Application

1. Select financial year, and grant type, then click on create.
2. The application shell for the selected grant type will get displayed after clicking on the create button, you will have the option to view, or delete the shell. The delete option will not be available once the application is on submitted status.

Click on the shell, then click the view button to capture the application details



3. The application menu will be returned after clicking on the view button; to complete or view each form, click on the select button.

Main Page		DG Application Forms 01 April 2019 – 31 March 2020		INSETA TEST 2017 - 2018 MEDIUM/LARGE - X00000011	
					Submit DG Application
#	Form	Description	Due Date	Select	
1.	1	Organisation Details	30/06/2019	Select	
2.	2	Contact Person Details	30/06/2019	Select	
3.	3	Learner Details	30/06/2019	Select	

a. Organization details

These details read from the submitted WSP details and are therefore view only, to navigate back to the other forms, click on "Back to DG Forms Menu"

Back to DG Forms Menu	Organisation Details
SDL Number	X00000011
Company Name	INSETA TEST 2017 - 2018 Medium/Large
Company Size	Medium (50 - 149)
Company Registration Number	2001/00345678/078
SIC Code	Activities auxiliary to Financial Intermediation
Physical Code	2470
Physical Address Line 1	2223 ext 1
Physical Address Line 2	Vukuzakhe Location
Physical Address Line 3	Volkstrust
Physical Suburb	Jubapark
Physical Municipality	Pixley Ka Seme
Physical Urban Rural	Urban
Physical Province	Western Cape
Postal Code	2470
Postal Address Line 1	
Postal Address Line 2	
Postal Address Line 3	
Postal Suburb	Jubapark
Postal Municipality	Pixley Ka Seme
Postal Urban Rural	Urban
Postal Province	Western Cape
Organisation Tel Number	
Organisation Email	
Organisation Website	

b. Company Contact Person

Under this section, capture the company contact person details, not those of the SDF. Once the contact details have been captured, click on the "Add" button", the captured contact details will then be saved. User can capture more than one.

To navigate back to the other forms, click on "back to DG Forms Menu"

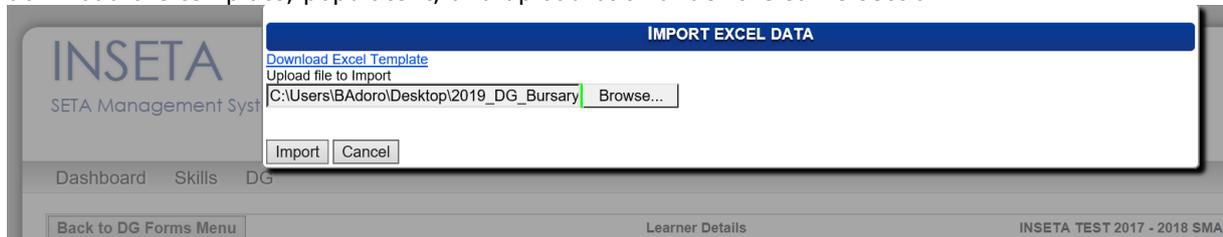
Back to DG Forms Menu		Contact Person Details
Title	Ms	
Person Name	Test	
Person Surname	Contact	
Person ID Number	AD12345	
Person Email Address	badoro@webmail.com	
Telephone Number	0113331234	
Cell Number	0723453333	

Add

c. Learner details

Learner details that are required for the application should be captured on this form and saved.

Alternatively the bulk import functionality can be used; click on the “bulk import” button, download the template, populate it, and upload back under the same section



- Once the import is completed, an import report will be returned at the bottom of the page. If all records were successfully imported, the report will be blank, else it will indicate what the errors are per record.
- Once errors on records have been rectified, the upload can be done again.

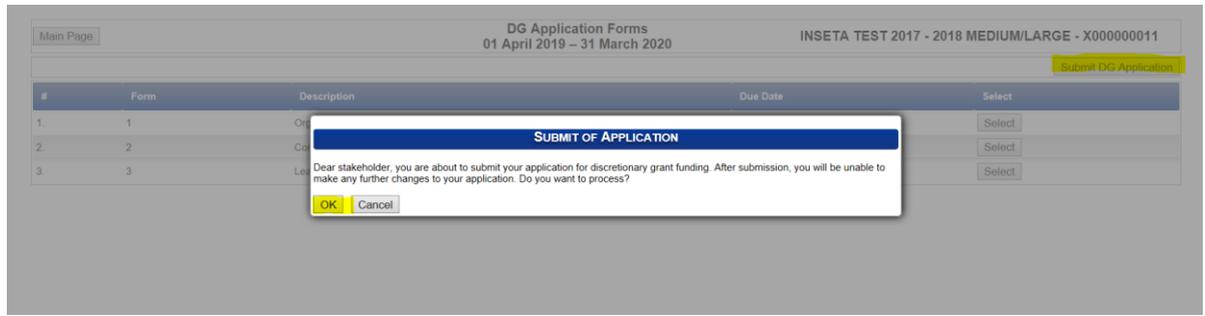
Full Qualification Title	<input type="text"/>
Skills Programme Title	<input type="text"/>
Skills Development Provider	<input type="text"/>

Add Update Cancel Bulk Import [Click here to download Bulk Import success and exception report](#)

d. Submit application

To submit the application, click on “Back to DG Form Menu”, then click the “Submit DG Application” button and confirm that the application can be sent.

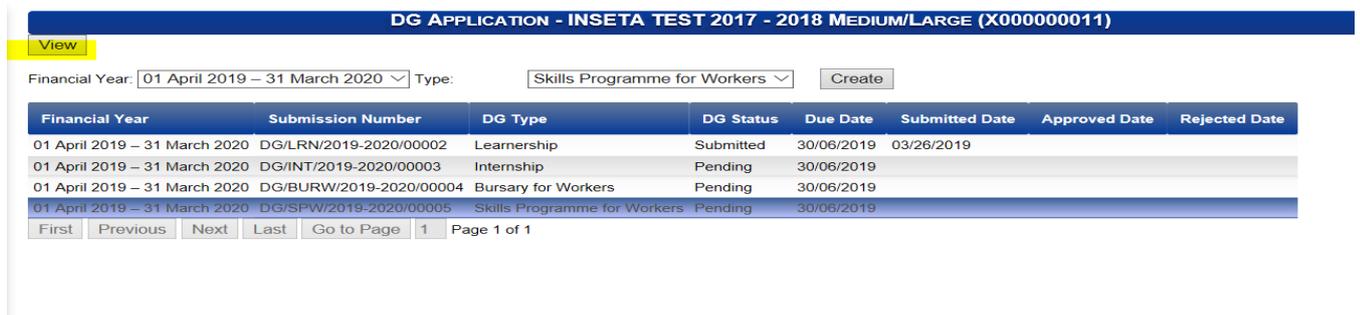
- You can log out of the application and log back in at a later stage to continue with the application before submitting it.
- Once the application has been submitted, SDF will receive a notification email on the email address that is captured on the SDF profile
- An application on submitted status cannot be deleted or edited, ensure that everything has been captured before clicking the “submit application” button



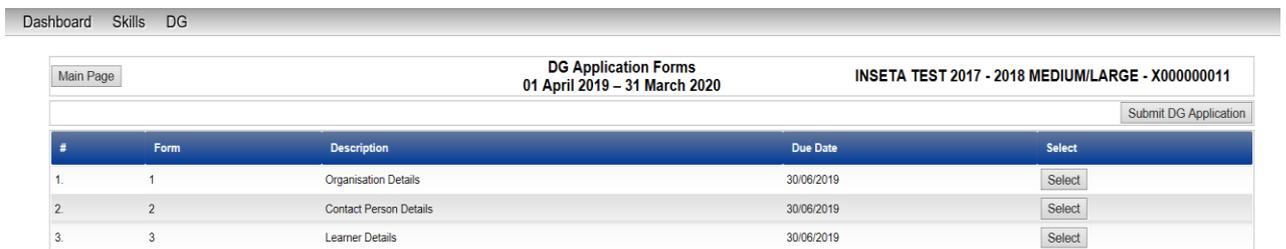
2.2.4 Skills programmes for Workers DG Application

1. Select financial year, and grant type, then click on create.
2. The application shell for the selected grant type will get displayed after clicking on the create button, you will have the option to view, or delete the shell. The delete option will not be available once the application is on submitted status.

Click on the shell, then click the view button to capture the application details



3. The application menu will be returned after clicking on the view button; to complete or view each form, click on the select button.



e. Organization details

These details read from the submitted WSP details and are therefore view only, to navigate back to the other forms, click on "Back to DG Forms Menu"

Back to DG Forms Menu	Organisation Details
SDL Number	X000000011
Company Name	INSETA TEST 2017 - 2018 Medium/Large
Company Size	Medium (50 - 149)
Company Registration Number	2001/00345678/078
SIC Code	Activities auxiliary to Financial Intermediation
Physical Code	2470
Physical Address Line 1	2223 ext 1
Physical Address Line 2	Vukuzakhe Location
Physical Address Line 3	Valksrust
Physical Suburb	Jubapark
Physical Municipality	Pixley Ka Seme
Physical Urban Rural	Urban
Physical Province	Western Cape
Postal Code	2470
Postal Address Line 1	
Postal Address Line 2	
Postal Address Line 3	
Postal Suburb	Jubapark
Postal Municipality	Pixley Ka Seme
Postal Urban Rural	Urban
Postal Province	Western Cape
Organisation Tel Number	
Organisation Email	
Organisation Website	

f. Company Contact Person

Under this section, capture the company contact person details, not those of the SDF. Once the contact details have been captured, click on the "Add" button", the captured contact details will then be saved. User can capture more than one.

To navigate back to the other forms, click on "back to DG Forms Menu"

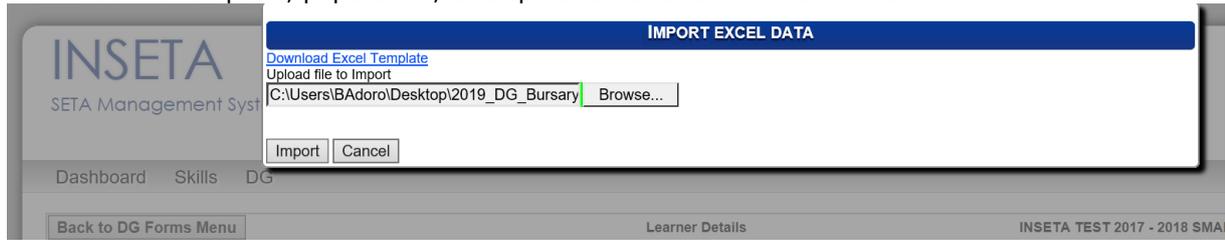
Back to DG Forms Menu	Contact Person Details
Title	Ms
Person Name	Test
Person Surname	Contact
Person ID Number	AD12345
Person Email Address	badoro@webmail.com
Telephone Number	0113331234
Cell Number	0723453333

Add

g. Learner details

Learner details that are required for the application should be captured on this form and saved.

Alternatively the bulk import functionality can be used; click on the "bulk import" button, download the template, populate it, and upload back under the same section



- Once the import is completed, an import report will be returned at the bottom of the page. If all records were successfully imported, the report will be blank, else it will indicate what the errors are per record.
- Once errors on records have been rectified, the upload can be done again.

Full Qualification Title	<input type="text"/>
Skills Programme Title	<input type="text"/>
Skills Development Provider	<input type="text"/>

[Click here to download Bulk Import success and exception report](#)

h. Submit application

To submit the application, click on "Back to DG Form Menu", then click the "Submit DG Application" button and confirm that the application can be sent.

- You can log out of the application and log back in at a later stage to continue with the application before submitting it.
- Once the application has been submitted, SDF will receive a notification email on the email address that is captured on the SDF profile
- An application on submitted status cannot be deleted or edited, ensure that everything has been captured before clicking the "submit application" button

