



**inseta**

INSURANCE SECTOR EDUCATION  
AND TRAINING AUTHORITY

Working together for a skilled tomorrow

# Mandatory Grants Applications Compliance

EMPOWERED TO *INFLUENCE* AND *INSPIRE*.

# SKILLS TEAM

## SKILLS PLANNING & RESEARCH TEAM

**Zakariyah Desai**  
Research Specialist

**Ernest Kaplan**  
Research Specialist



**Thalia Naidoo - Graduate Intern: Research**

**Bongi Malinga**  
Skills Development  
Specialist



**Adeline Singh**  
Skills Planning &  
Research  
Manager

**Tasmin Davids**  
Skills Development  
Specialist



**Martin Kolele**  
Administrator



**Aubrey Manganyi**  
Administrator



**SECTOR SKILLS FACILITATORS - 2 GAUTENG, 1 KZN, 1 WC, 1 EC**

# Compliance Framework – Divisional Adherence

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- PFMA
- Skills Development Levies Act
- Skills Development Act
  - \* Regulations on Monies received by SETAs and related matters
  - \* DHET guidelines framework for SETAs quarterly performance reports
  - \* DHET Standard operating procedure (SOP) on Inter-SETA transfers

# Enquiries

Employers are requested to always quote their skills development levy numbers on their email subject line for ease of reference.

INSETA will be using N and L numbers.

N for Non-Levy paying.

L for Levy-paying.

# Employer Registration

## Standard Industrial Code

Code	Description
82191	Short-Term Insurance
82110	Life Insurance
82120	Pension Funding
82100	Insurance & Pension Funding
81902	Risk Management
82131	Health Care Benefits Administration
81901	Unit Trusts
82192	Funeral Insurance
82193	Reinsurance
83000	Activities auxiliary to Financial Intermediation (e.g. Brokerages)

# Employer registration

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## Levy payer

- Annual payroll.
  - R500 000.00 and above.
- Registration is done through SARS.
  - EMP 201.
- Allocated an Skills Development Levy number:
  - L120345678.

# Employers registration

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## Non-Levy payers

- Annual payroll.
  - Less than R500 000.00.
- Registration is done through INSETA:
  - Application form.
  - CIPC documentation (Company registration).
  - License to operate ( FSCA formally known as FSB).
  - Statement of registration from SARS (EMPSA).
  - Letter from an accountant stating the company's annual payroll is below R500 000.00.
- Allocate an N number.
  - N120345678 – ( N )

# Employers registration

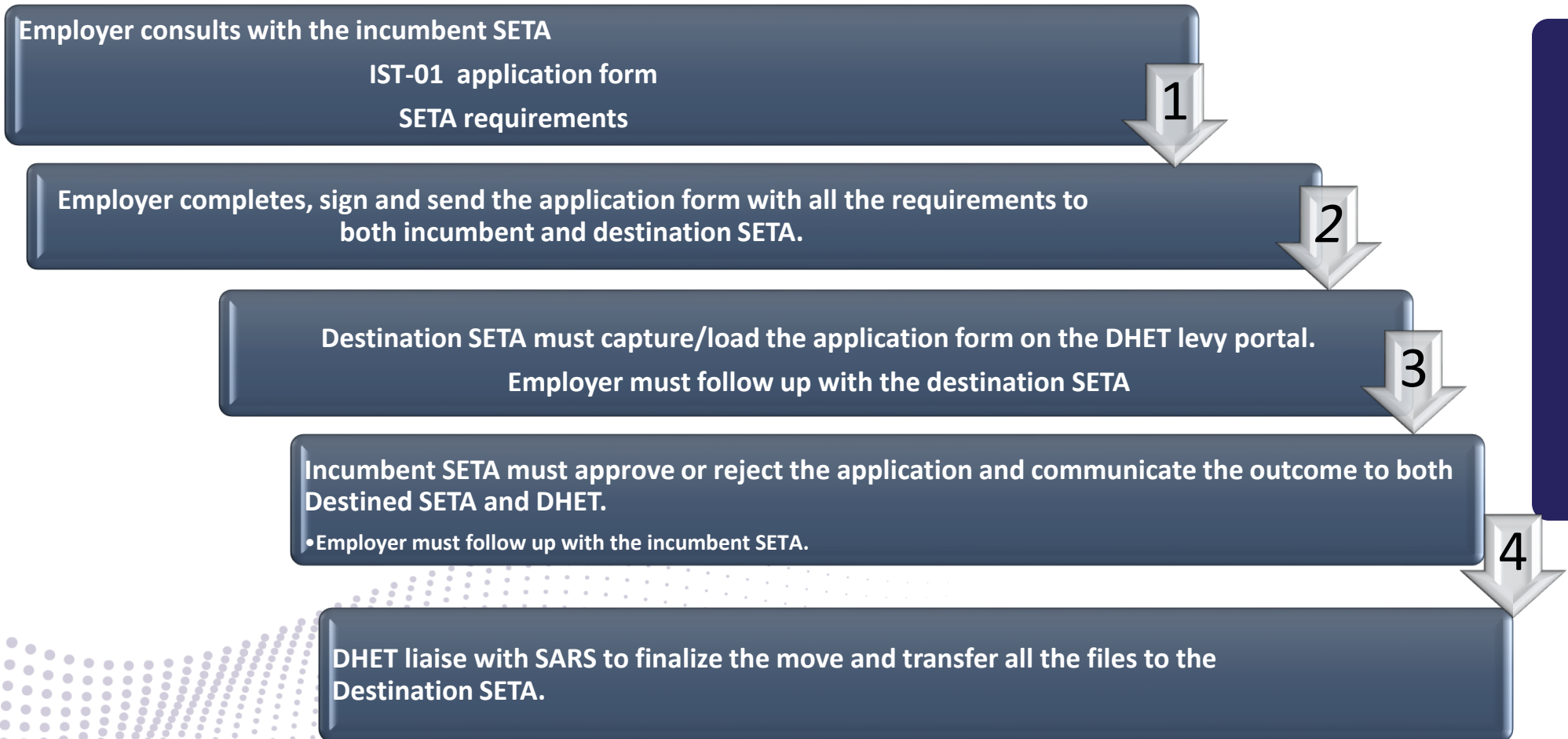
## Co-operatives, Burial societies, NPOs and Funeral Parlours

Documentation Required for INSETA registration	Co-Operatives	Funeral Parlour	Burial Society
Banking details	X	X	X
CIPC/DTI/SARB Registration	X	X	X
Tax Certificate that you are in good financial standing	x	x	X
Constitution	X		X
Contract with an Insurer	optional		optional
FSP Licence		X	
Motivation-relationships with Insurance sector (Review committee approval)	optional	optional	optional



# Employer registration

Inter-seta transfer refers to the process of moving one employer from one seta to another seta.



# Skills Development Facilitator Registration

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- All SDF access will NO LONGER be deactivated by 30 June each year.
- All SDF registrations will be done on-line.
- Manual SDF applications will no longer be accepted.
- SDFs will need to upload the following to registering:
  - Signed appointment letter.
  - Signed SDF code of conduct to be downloaded on our system

# Skills Development Registration

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## How to register online

- Visit our website: [www.inseta.org.za](http://www.inseta.org.za)
- Click on **LOG IN**
- Click on **REGISTER** on the right hand top corner
- Select
  - **SDF REGISTRATION** (for first timer SDFs)
  - **SDF RE-REGISTRATION** ( for returning SDFs)
- Complete or Update SDF details and click **SAVE and PROCEED**
- Download, sign and upload the code of conduct. click **SAVE and PROCEED**
- Upload the signed appointment letter, then click **FINALIZE APPLICATION**

# Mandatory Grants Applications notices

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- Deadline date:
  - **30<sup>th</sup> April 2021 (Midnight).**
- Organizing Framework for Occupations (OFO codes)
  - WSP = OFO code Version 19
  - ATR = OFO codes Version 19
- Reporting periods
  - WSP = 1 January 2021 – 31 December 2021
  - ATR = 1 January 2020 – 31 December 2020
- INSETA's financial year
  - 1 April 2021 – 31 March 2022 ( don't confuse with reporting period)

# Supporting Documents

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- Authorization Page:
  - Must be signed, dated, name of signatories
- Bank details:
  - Provide INSETA with a stamped confirmation letter which is not older than 6 months.
- BEE certificate
  - Provide INSETA with an updated copy
- FSCA license
  - Provide INSETA with an updated copy
- Financial Statements
  - Provide audited financial statements to support your annual turnover.

# Authorisation Page for small firms

## ATR YEAR 2021 AND WSP YEAR 2022 TEMPLATES

DHET Registered Name: Test 2016

SETA Registered Name: INSETATest

Company Size : Small Levy Paying (1 - 49)

**NT30015030**

SDF: Bonginkosi Malinga

Submission Date: 27 January 2021

### 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.
3. FOR SUBMISSION TO THE INSETA, THESE REPORTS MUST BE COMPLETED ON THE INSETA INDICIUM SYSTEM.
4. THE PURPOSE OF THESE GUIDELINES IS TO ASSIST WITH THE COMPLETION OF THE WSP & ATR REPORTS. PLEASE NOTE THAT NO REPORTS MUST BE COMPLETED ON THESE GUIDELINES FOR SUBMISSION TO THE INSETA.
5. AFTER OBTAINING THE REQUIRED SIGNATURES ,THE AUTHORISATION FORM AS WELL AS BANK DOCUMENTS SHOULD BE UPLOADED ON THE SYSTEM UNDER THE WSP/ATR DOCUMENTS UPLOAD TAB.
6. PLEASE NOTE: IF THE NAME OF THE COMPANY APPEARING ON THE DEPARTMENT OF HIGHER EDUCATION AND TRAINING SIDE DIFFERS FROM THE NAME ON THE BANK DOCUMENTS, THEN YOU NEED TO UPLOAD BOTH DOCUMENTS (BANK DOCUMENTS AND CIPRO DOCUMENTS) TO SHOW PROOF OF REGISTERED COMPANY NAME AND TRADING NAME BEFORE PAYMENT CAN BE MADE. IF THE DEPARTMENT OF HIGHER EDUCATION AND TRAINING REGISTERED NAME IS INCORRECT THEN YOU NEED TO CONTACT SARS TO CHANGE THE COMPANY'S REGISTERED NAME.

**DUE DATE: 30 April 2021**

PLEASE NOTE THAT EXTENSIONS WILL ONLY BE GRANTED FOR THE SUBMISSION OF THE ATR AND WSP REPORTS ON WRITTEN REQUEST TO THE INSETA COUNCIL AND AT THE COUNCIL'S DISCRETION - REQUESTS TO BE HANDED TO THE SKILLS DIVISION. PLEASE REFER TO THE GOVERNMENT GAZETTE No. 29583 REGULATIONS (Regulation No. 713, Section 5.2 (a, b) & Section 5.5).

### Authorisation

We, the undersigned, submit this information in fulfillment of this entity's legal obligation in terms of the skills development legislation and regulations. We declare that, to the best of our knowledge, the information contained in this WSP /ATR /Pivotal Report is accurate and up to date. We recognise that any inaccurate statement in this document may constitute fraud and be subject to the full penalty of the law.

NAME	DESIGNATION	DATE SIGNED	SIGNATURE
Bonginkosi Malinga	Primary Skills Development Facilitator*	27/01/2021	[Signature]
bonginkosi malinga	CEO/Managing/Finance/HR Director*	27/01/2021	[Signature]
	Other (Please specify)		

\* Compulsory to fill in the full names of the persons signing this report.  
 \* Compulsory signatures i.e. these persons must authorize this Report.  
 \* Primary SDF.  
 \* CEO/Managing/Finance/HR Director.

After Successful Submission:

- The INSETA intends sending Approval Letters for all fully completed, duly signed, correct submissions within the month of July 2021
- Beginning of 1st Disbursement - September 2021
- Beginning of 2nd Disbursement - December 2021
- Beginning of 3rd Disbursement - March 2022
- Beginning of 4th Disbursement - June 2022

# Authorisation page for medium and large firms

## ATR YEAR 2021 AND WSP YEAR 2022 TEMPLATES

DHET Registered Name: TEST Legal (Pty) Ltd

SETA Registered Name: Cape Town Test 2018 Med and Lar

Company Size : Medium (50 - 149)

**N130014977**

SDF: Bonginkosi Malinga

Submission Date: 27 January 2021

### PLEASE NOTE:

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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.
3. FOR SUBMISSION TO THE INSETA, THESE REPORTS MUST BE COMPLETED ON THE INSETA INDICIUM SYSTEM.
4. THE PURPOSE OF THESE GUIDELINES IS TO ASSIST WITH THE COMPLETION OF THE WSP & ATR REPORTS. PLEASE NOTE THAT NO REPORTS MUST BE COMPLETED ON THESE GUIDELINES FOR SUBMISSION TO THE INSETA.
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6. PLEASE NOTE: IF THE NAME OF THE COMPANY APPEARING ON THE DEPARTMENT OF HIGHER EDUCATION AND TRAINING SIDE DIFFERS FROM THE NAME ON THE BANK DOCUMENTS, THEN YOU NEED TO UPLOAD BOTH DOCUMENTS (BANK DOCUMENTS AND CIPRO DOCUMENTS) TO SHOW PROOF OF REGISTERED COMPANY NAME AND TRADING NAME BEFORE PAYMENT CAN BE MADE. IF THE DEPARTMENT OF HIGHER EDUCATION AND TRAINING REGISTERED NAME IS INCORRECT THEN YOU NEED TO CONTACT SARS TO CHANGE THE COMPANY'S REGISTERED NAME.

**DUE DATE: 30 April 2021**

PLEASE NOTE THAT EXTENSIONS WILL ONLY BE GRANTED FOR THE SUBMISSION OF THE ATR AND WSP REPORTS ON WRITTEN REQUEST TO THE INSETA COUNCIL AND AT THE COUNCIL'S DISCRETION - REQUESTS TO BE HANDED TO THE SKILLS DIVISION. PLEASE REFER TO THE GOVERNMENT GAZETTE No. 29583 REGULATIONS (Regulation No. 713, Section 5.2 (a, b) & Section 5.5).

# Authorisation page for medium and large firms

## Authorisation

We, the undersigned, submit this information in fulfillment of this entity's legal obligation in terms of the skills development legislation and regulations. We declare that, to the best of our knowledge, the information contained in this WSP/ATR/Pivotal Report is accurate and up to date. We recognise that any inaccurate statement in this document may constitute fraud and be subject to the full penalty of the law.

FULL NAME	DESIGNATION	DATE SIGNED	SIGNATURE
Bonginkosi Malinga	Primary Skills Development Facilitator*	03/07/2021	[Redacted Signature]
[Redacted Name]	Training Committee Chairperson*	03/07/2021	[Redacted Signature]
Lucia ABC	CEO/Managing/Finance/HR Director*	03/07/2021	[Redacted Signature]
	Other (Please specify)		

\* Compulsory to fill in the full names of the persons signing this report.

\* Compulsory signatures i.e. these persons must authorize this Report.

\* It is imperative for companies with more than 50 employees to have a Training Committee.

After Successful Submission:

- The INSETA intends sending Approval Letters for all fully completed, duly signed, correct submissions within the month of July 2021
- Beginning of 1st Disbursement - September 2021
- Beginning of 2nd Disbursement - December 2021
- Beginning of 3rd Disbursement - March 2022
- Beginning of 4th Disbursement - June 2022



# Top 10 Occupations in Demand 2021/22

PERIOD	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	THE INTERVENTION PLANNED BY THE SETA
2021 - 2022	2019-332101	Insurance Agent	Insurance Client Services Agent Commercial Underwriter	Training on Commercial and Personal Lines insurance as well as Technical & Medical Underwriting. Focus on Fit & Proper Requirements, <u>in order to</u> conduct effective insurance sales
2021 - 2022	2019-212101	Actuary	Actuary Manager Average Adjuster	Training of Actuaries to undertake Moses testing, VBA & C++ programming & Risk Calculations. Training of qualified actuaries to obtain long-term business experience.
2021 - 2022	2019-251201	Software Developer	Software Architect Software Designer	Training on designing and developing computer software systems. <u>Also</u> on evaluating the requirements for these systems.
2021 - 2022	2019-332102	Insurance Broker	Short Term Insurance Consultant	Advanced training in new aspects of the 3 major categories of insurance, viz. short and long <u>term</u> and collective investments. Training in new facets of insurance and risk coverage and premium calculation.
2021-2022	2019-251203	Developer Programmer	ICT Programmer Applications Developer	Training to develop high-level system developers, such as analyst, architect & technical developers.

# Top 10 Occupations in Demand 2021/22

PERIOD	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	THE INTERVENTION PLANNED BY THE SETA
2021 - 2022	2019- 331503	Insurance Loss Adjuster	Accident Claims Officer Insurance Loss Assessor	Training candidates in credit management, analytical, and administrative skills. Learning how to undertake a claims investigation
2021- 2022	2019- 431204	Insurance Claims Administrator	Insurance Claims Clerk Claims Analyst	Advanced training programmes on liability and audit insurance settlements. Acquiring further knowledge in the areas of statistical or actuarial data, bonds and shares.
2021- 2022	2019- 242207	Compliance Officer	Financial Markets Compliance Officer Compliance Officer (Financial Sector)	Intermediate training in compliance services in order to comply with applicable regulatory requirements.
2021- 2022	2019- 241301	Financial Investment Advisor	Financial Planner Financial Advisor Financial Analyst	Develops and implements financial plans for individuals and organisations, and advises on investment strategies and their taxation implications, securities, insurance, pension plans and real estate
2021 2022	2019- 122101	Sales and Marketing Manager	Insurance Sales and Marketing Manager Key Account Manager	Advanced training in budgets, sales methods, expenditure control and allocation of resources

# Contact Details for INSETA Skills Team and other Divisions at INSETA



Please visit



[www.inseta.org.za](http://www.inseta.org.za)



GO to.. About US..OUR  
PEOPLE



END OF PRESENTATION

<https://www.linkedin.com/company/70400013/admin/>

<https://www.instagram.com/insuranceseta/>

<https://web.facebook.com/INSETA-103512076350264>

The End



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