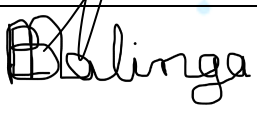**MIS IMPLEMENTATION**

SKILLS MODULE TRAINING GUIDE
Small Organisations

Version 2.0

1 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

Table of Contents

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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.
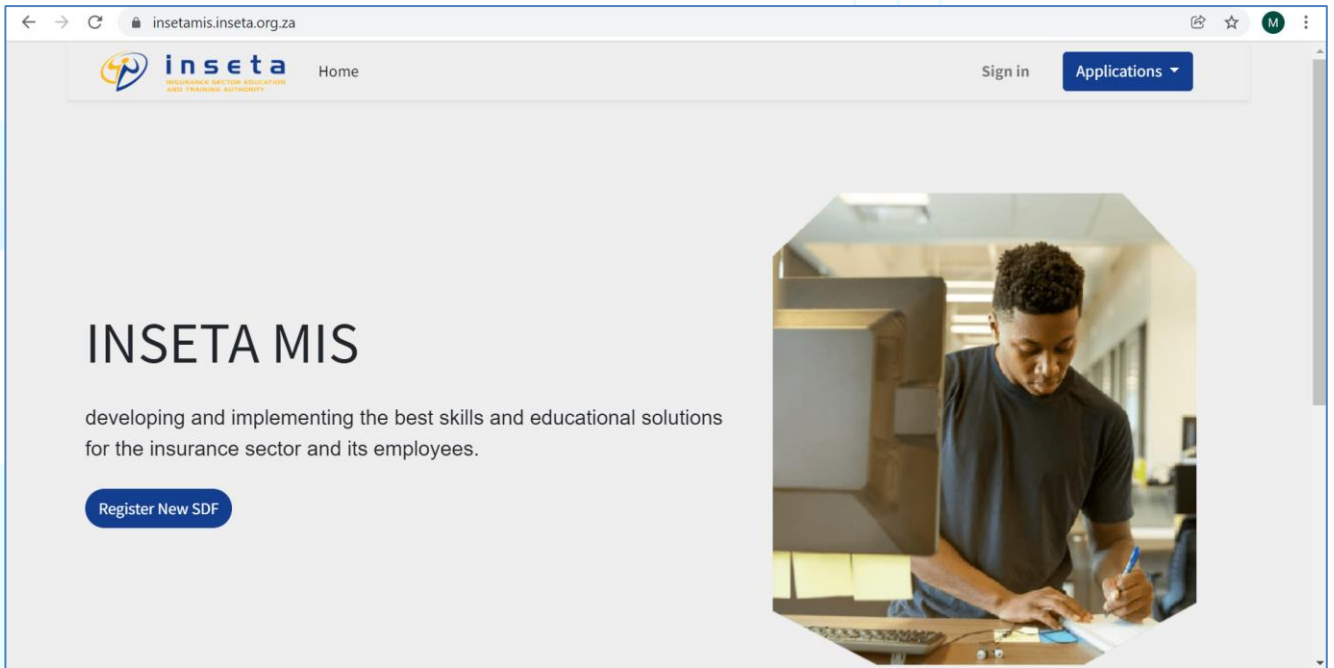
2.1   Objective

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

5

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
ATTENTION	This icon alerts the user to take note of the important message
(i)	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

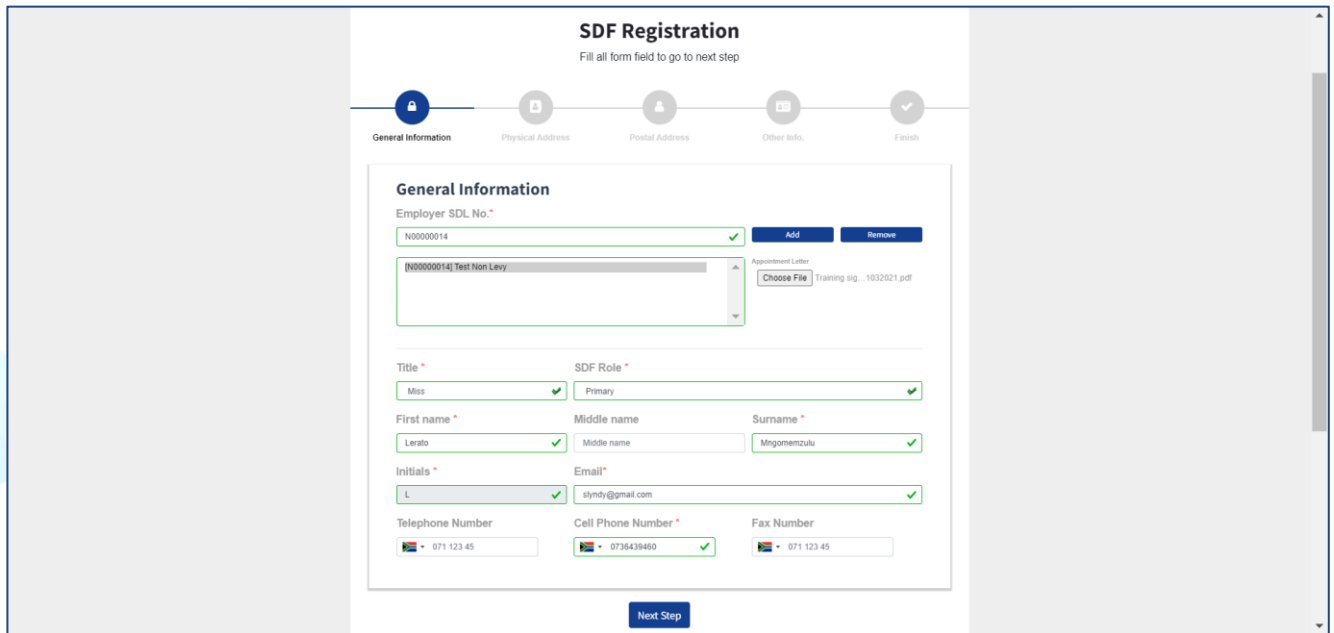This section provides a guide on how to register as a SDF on the system.

4.1   STEP 1- SDF Registration
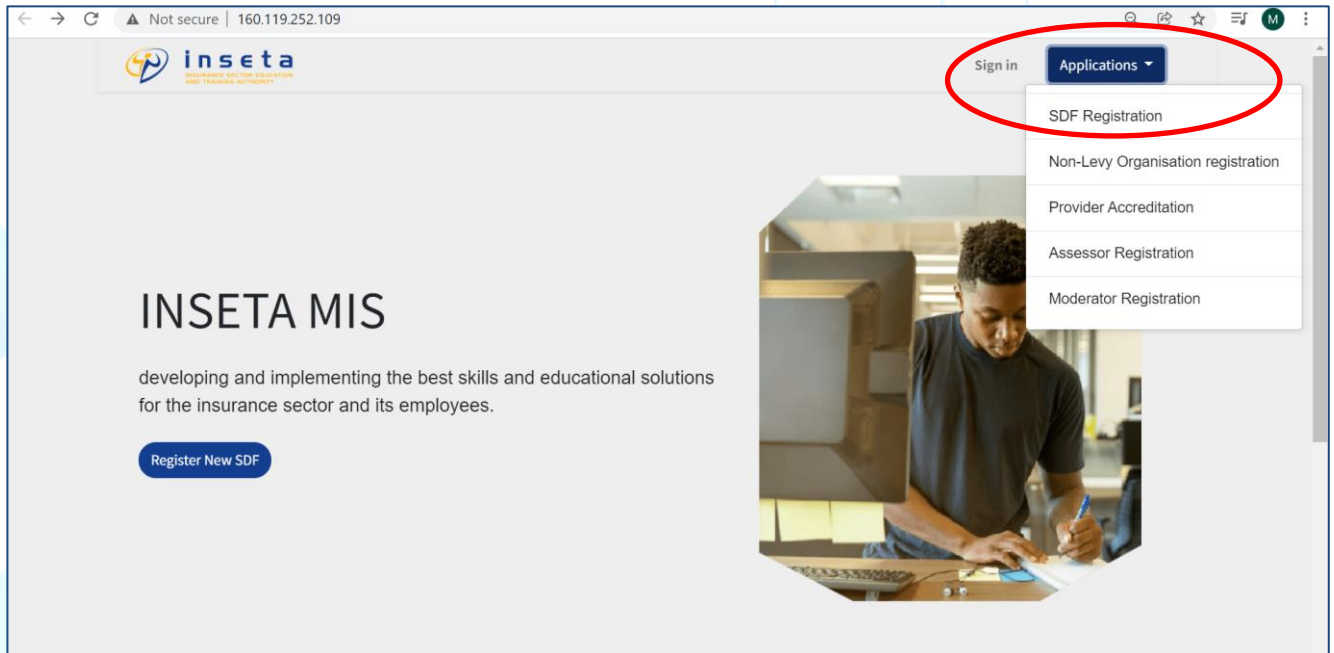
- On the INSETA MIS landing page, Click on **Applications** to expand dropdown menu
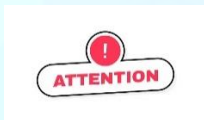- Then, click on **SDF Registration**
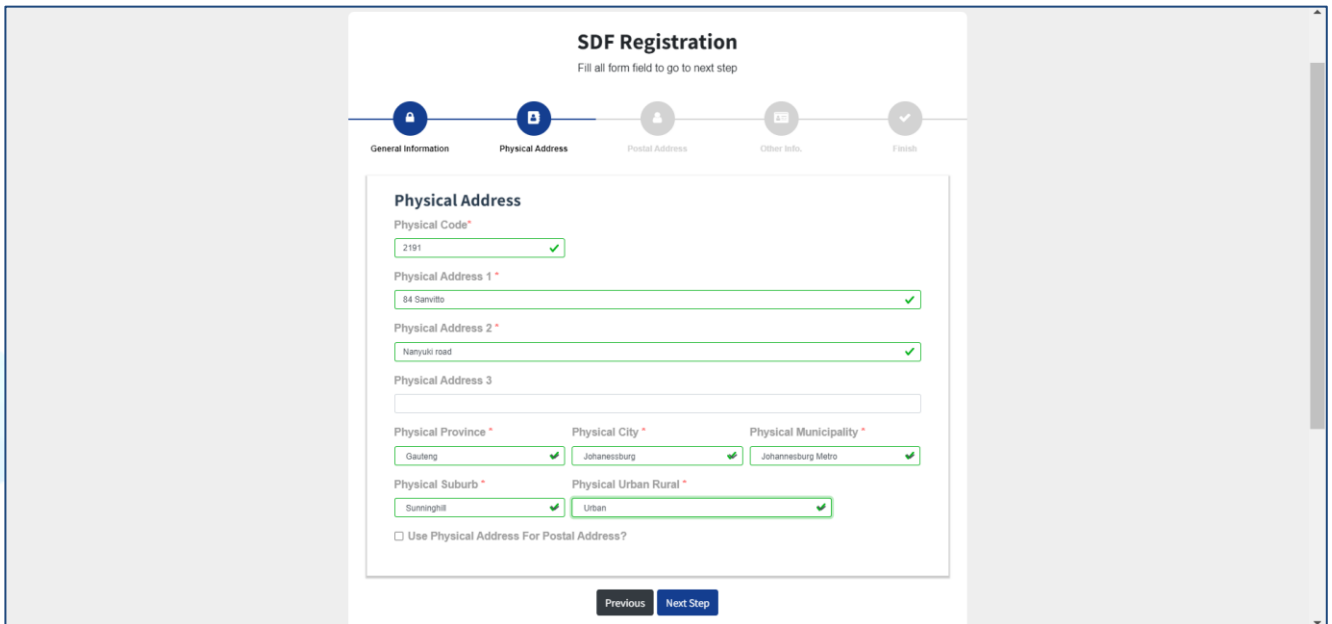
The SDF Registration form is displayed

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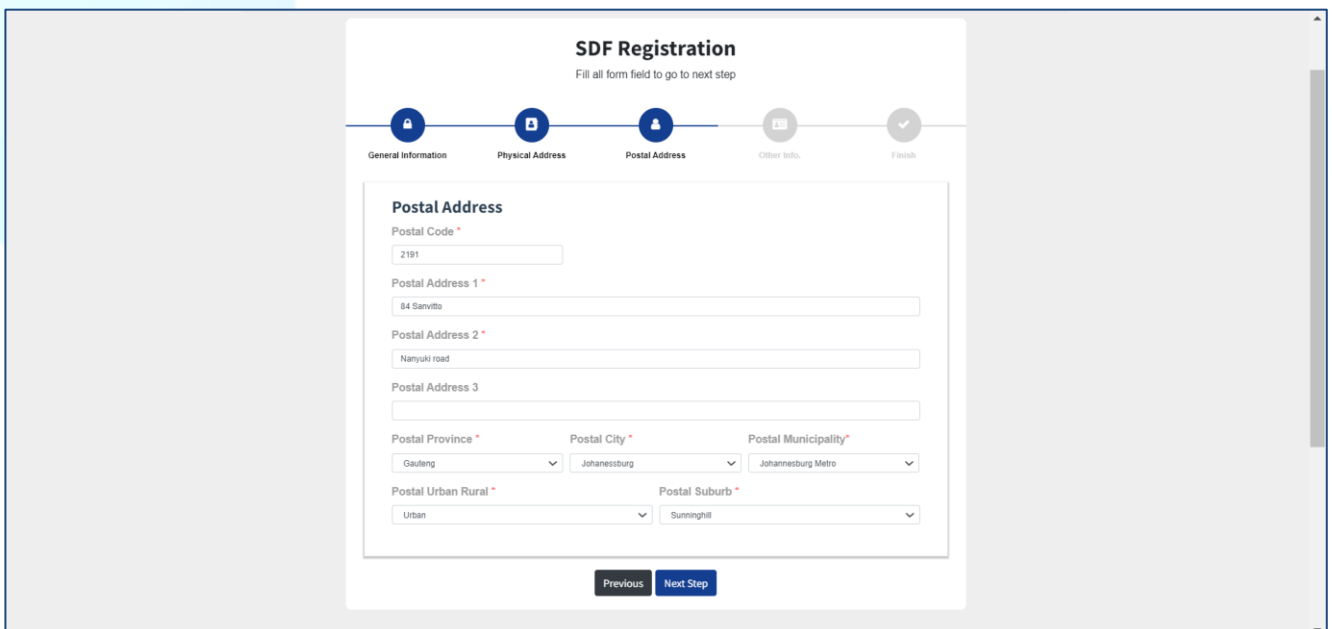- Then, capture all the required general information and click **Next Step**

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**

🖱 Capture Other information

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

The appointed Skills Development facilitator signs this acknowledgement that they are not working for or contracted with any training provider and operates independently of training institutions.

ACKNOWLEDGEMENT

I, ...(SDF), hereby acknowledge that I have read and understood this Skills Development Facilitator's Code of Conduct; and agree to uphold the ethical standards contained therein to the best of my ability.

SIGNATURE: _____   DATE: _____

2

🖰 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**

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12
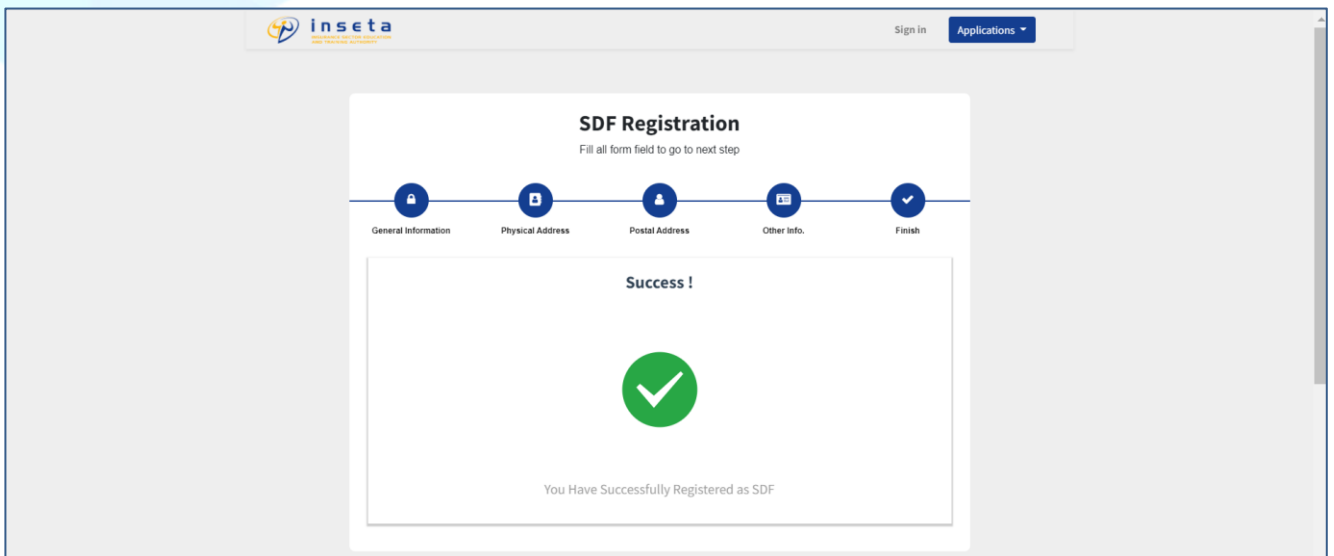
You have successfully registered as SDF on the system. An email will then be sent to the Skills Specialist and Manger for verification and approval.

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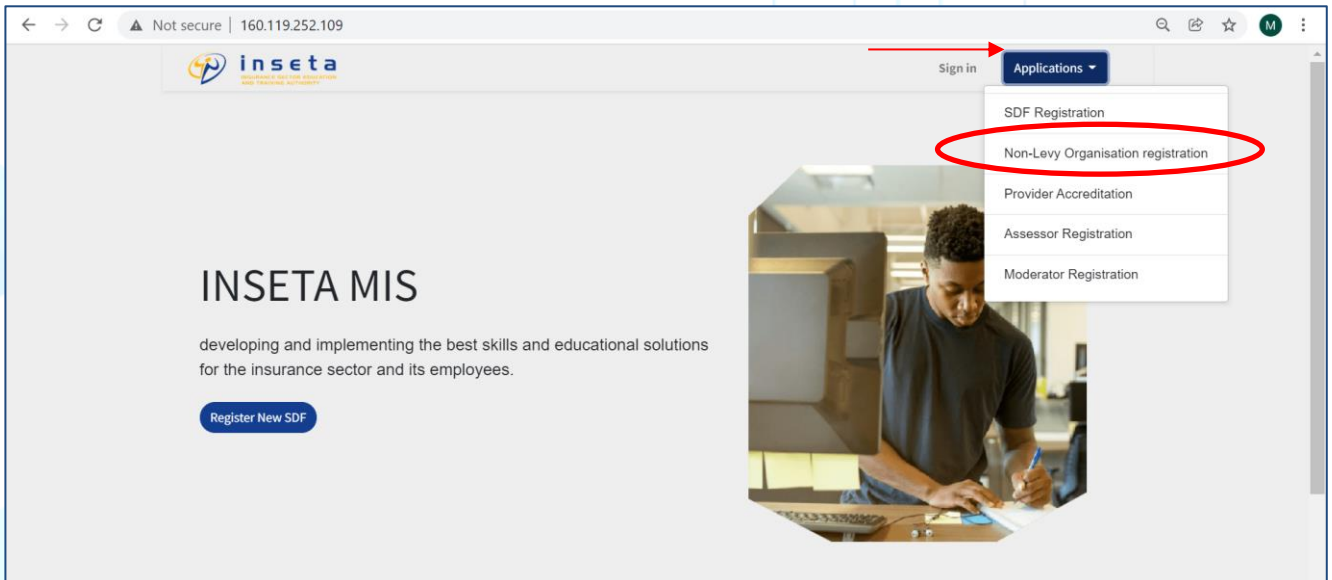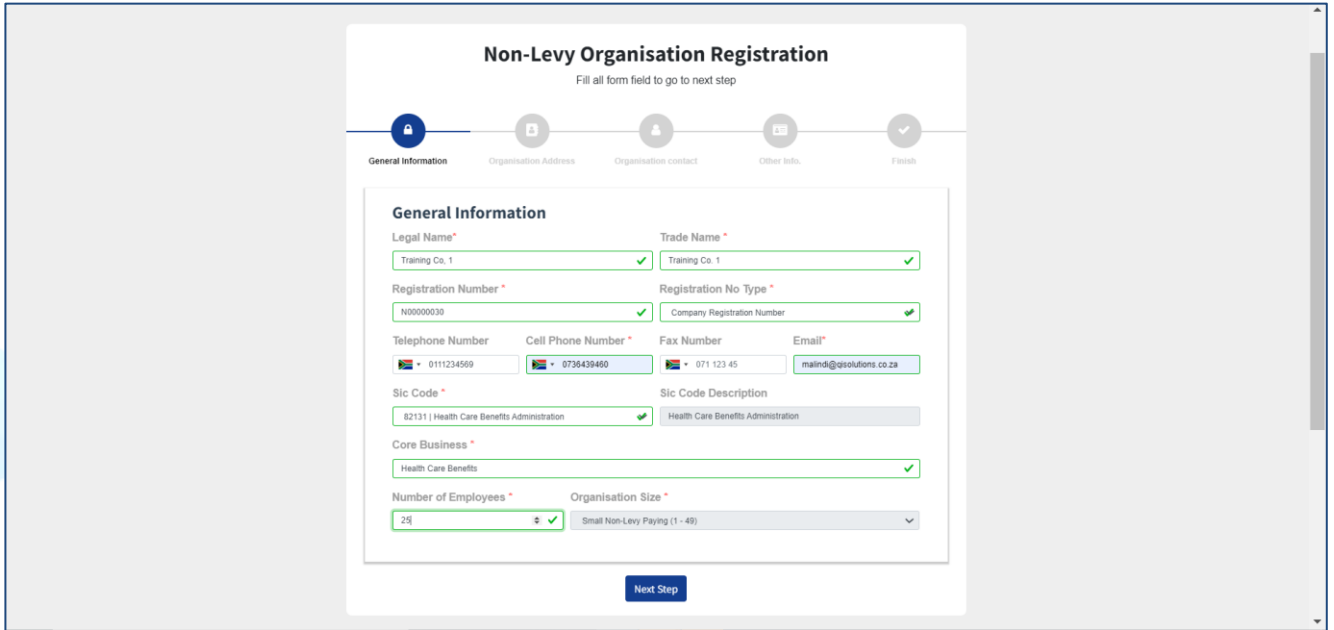
- 🖰   On the INSETA MIS landing page, Click on **Applications** to expand dropdown menu
- 🖰   Then, click on **Non-levy Organisation registration**

ⓘ   The Non-levy Organisation registration form is displayed
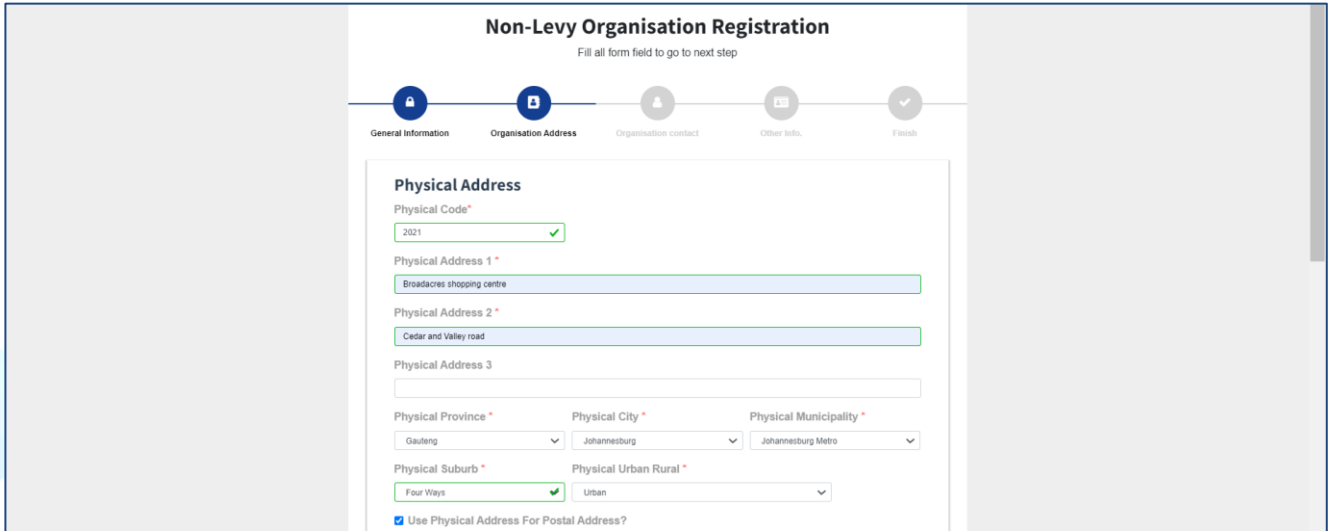
🖱 Capture Organisation general information and then click **Next Step**

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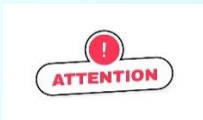
Please note that the fields marked with an asterisk (*) are mandatory and should be completed

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

5.3 STEP 3- Capture Organisation Address

🖱 Capture Physical Address details

🖱 Click on the **Use Physical Address for Postal Address** check box if applicable for the next step

🖱 Capture Postal Address details, and then click **Next Step**
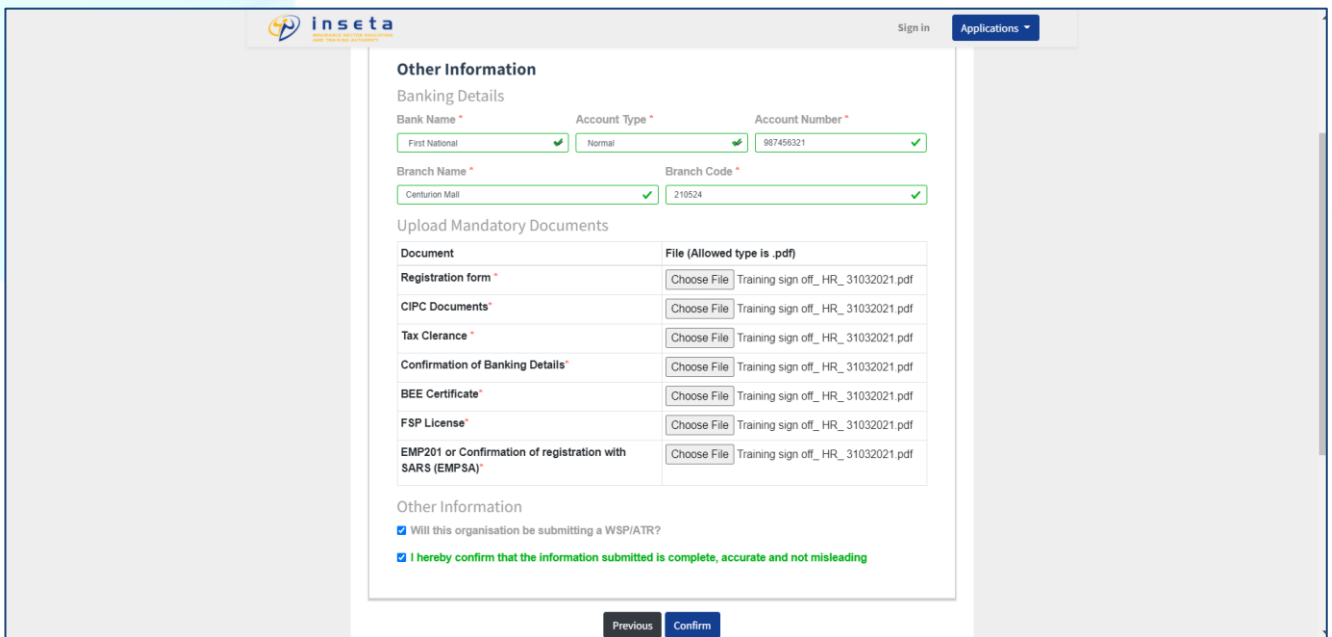
5.4   STEP 4- Capture Organisation contact

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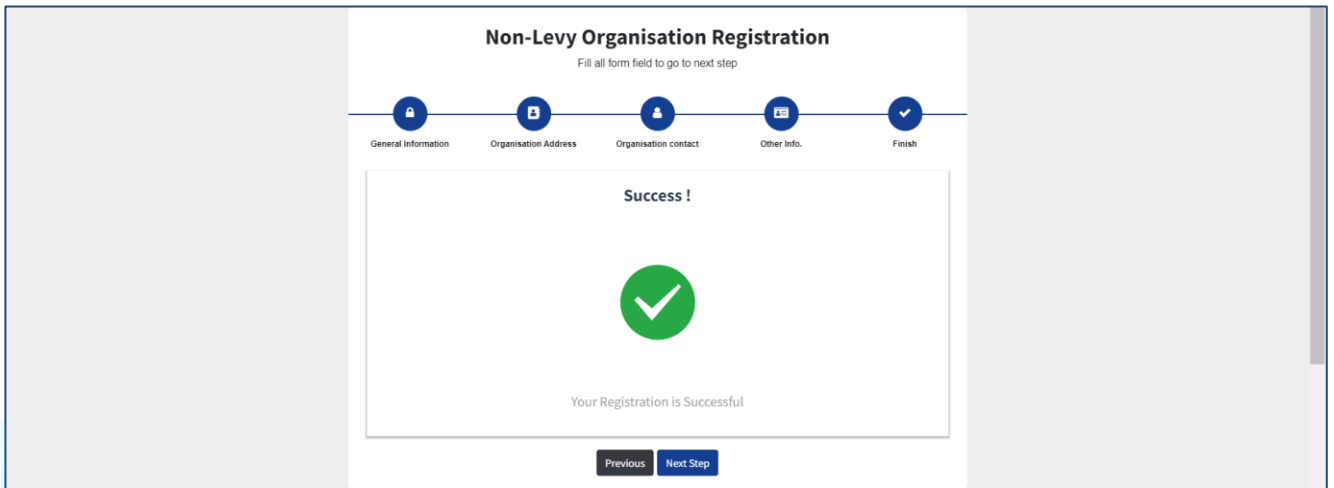
You have successfully registered the non-levy organisation on the system. An email will then be sent to the Skills Specialist and Manger for verification and approval.

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

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inseta
INSURANCE SECTOR EDUCATION AND TRAINING AUTHORITY

INSETA
37 Empire road
Parktown
Gauteng 2193
South Africa
Johannesburg,Gauteng

December 06, 2021

Dear Training Co.1,

EMPLOYER REGISTERATION APPROVAL

Following the satisfactory evaluation of your organisation details, we offer you this letter of approval.

You may now access the system using the following link https://InSETAMIS.inseta.org.za/web/login

For any queries please contact the INSETA Call Centre on 086 113 0013.

Yours in Skills Development

Adeline Odette Singh

6 Update existing Organisation details

6.1 Updating Organisation Details

🖰 Search and click on the organisation

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

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

> ℹ️ *The Organisation details are successfully updated.*

6.2   Verify linked child companies.

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

🖰 Click **Save**

6.3   Update Organisation Contacts

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

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

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

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

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

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

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

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

- 🖱 Click on **CEO** tab
- 🖱 Click **Edit** to enable editing
- 🖱 Click **Add a line**
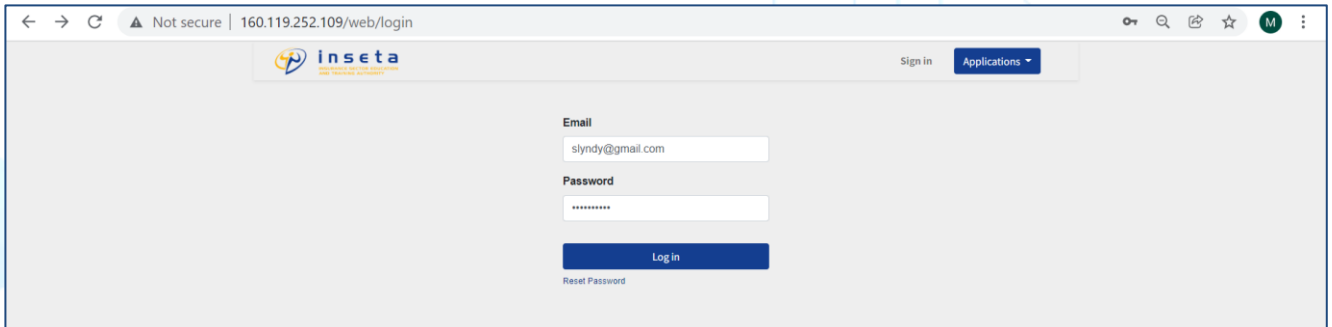
- 🖱 Capture Banking information
- 🖱 Click **Save & Close**

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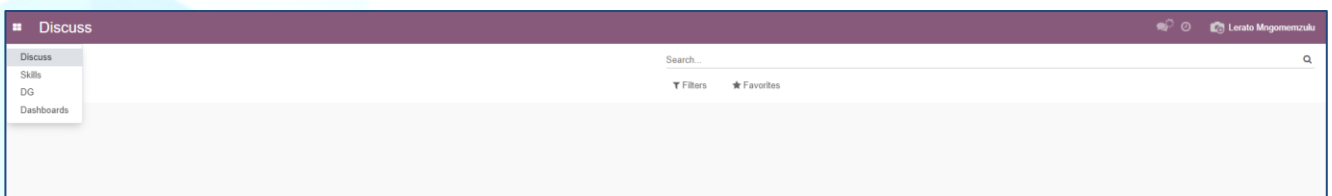
This section provides a guide on WSP & ATR submissions on the system for small organisations. This form requires employers to report on all training interventions that took place in their company in the previous financial year. The employer must report both credit and non-credit bearing interventions

7.1   STEP 1- System Login
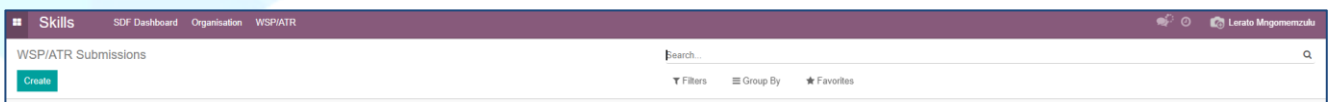
🖱 Login as SDF once application is approved

7.2   STEP 1- Create WSP

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

🖱 Click **Create**

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

7.3 STEP 2- Implementation Report

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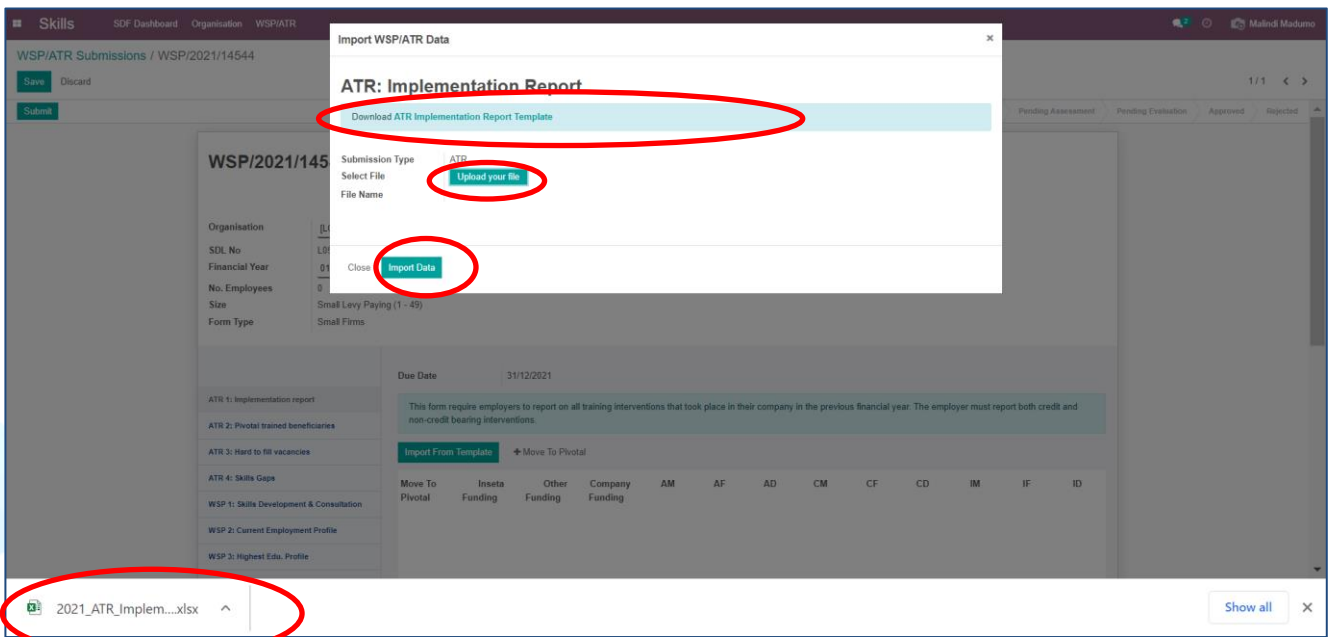
- 🖱 Click **Download ATR Implementation Template**
- 🖱 On the pop-up screen, Click **Download ATR Implementation Template**
- 🖱 The file is downloaded on your machine
- 🖱 Click on **Upload file** then browse your machine and select the saved file
- 🖱 Click **Import Data**

The Data is imported and populates on the system as shown below
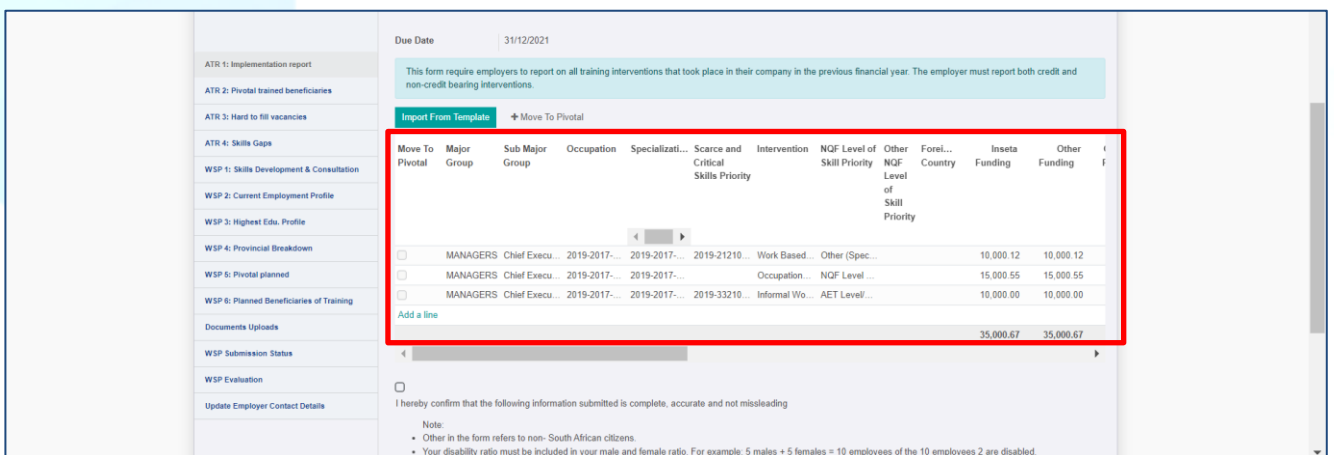
Always remember to tick the declaration checkbox "I Hereby confirm that the following information submitted is complete, accurate and not misleading"
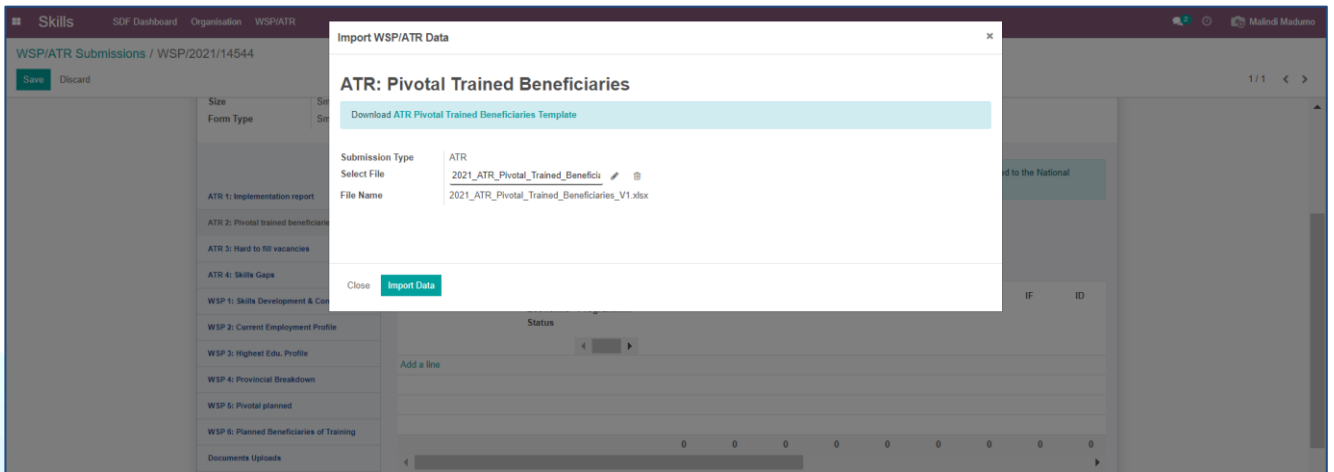
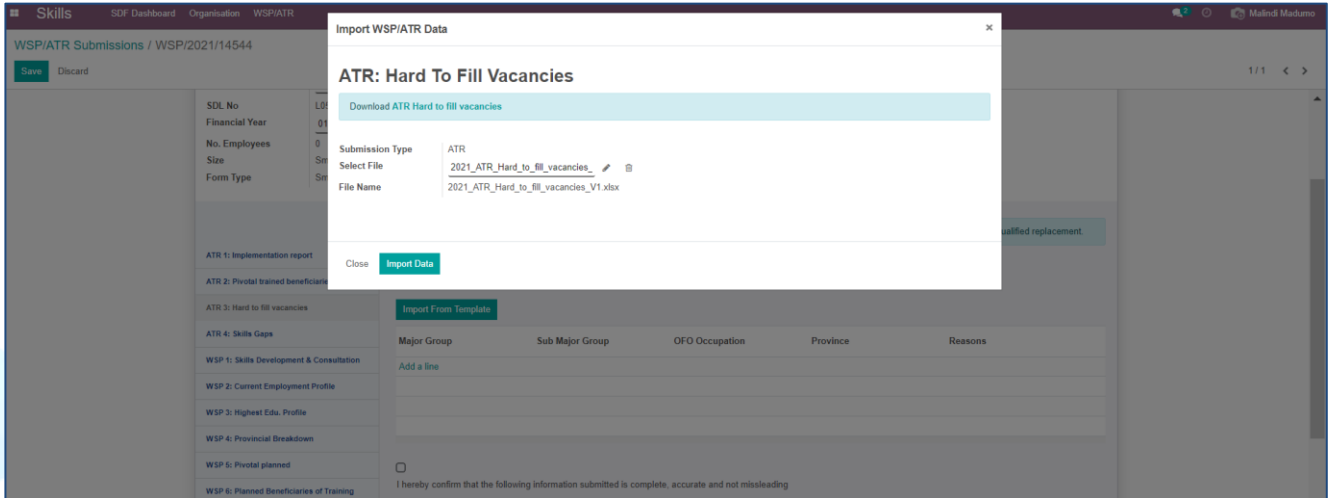## 7.4 STEP 3- Pivotal trained beneficiaries

⍟ 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**

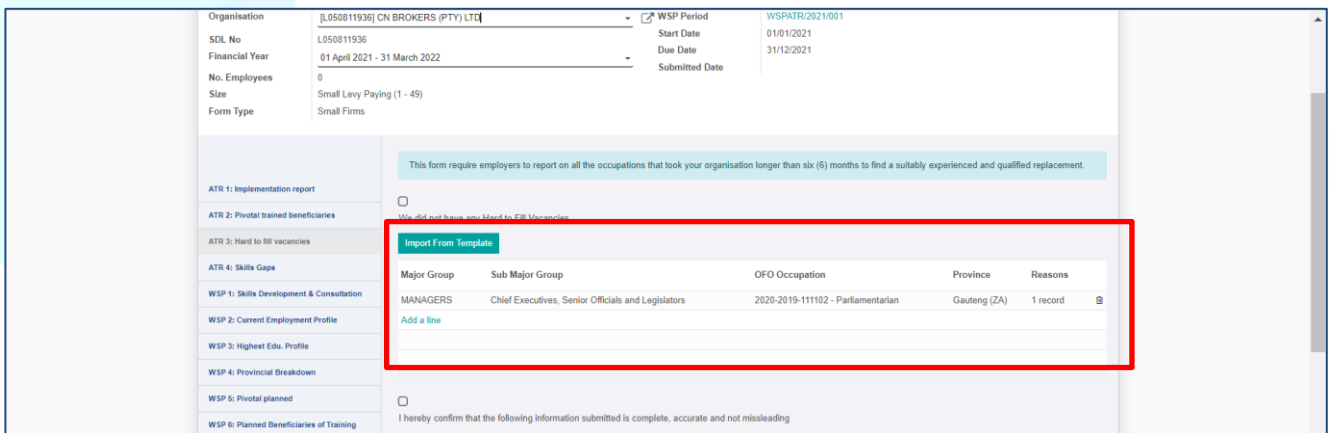The Data is imported and populates on the system as shown below

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

🖱 Click **Skills Gap**

![ATTENTION] **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

🖱 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

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- 🖱 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
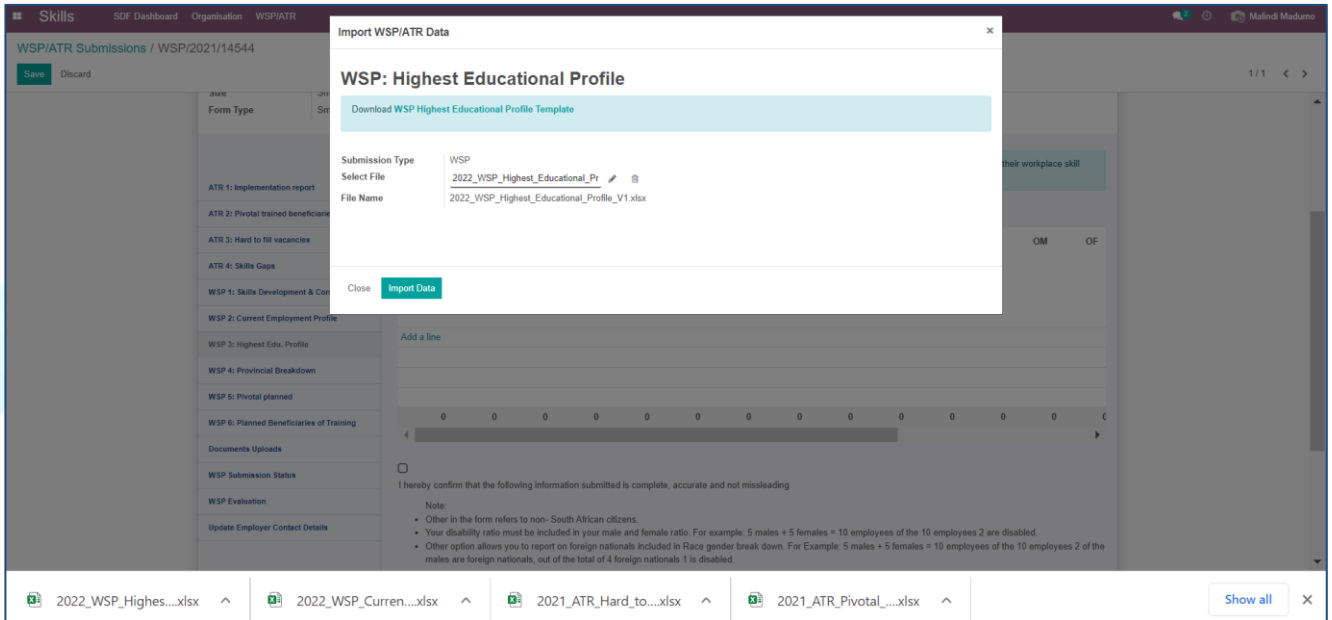

- 🖱 Check the declaration tick-box
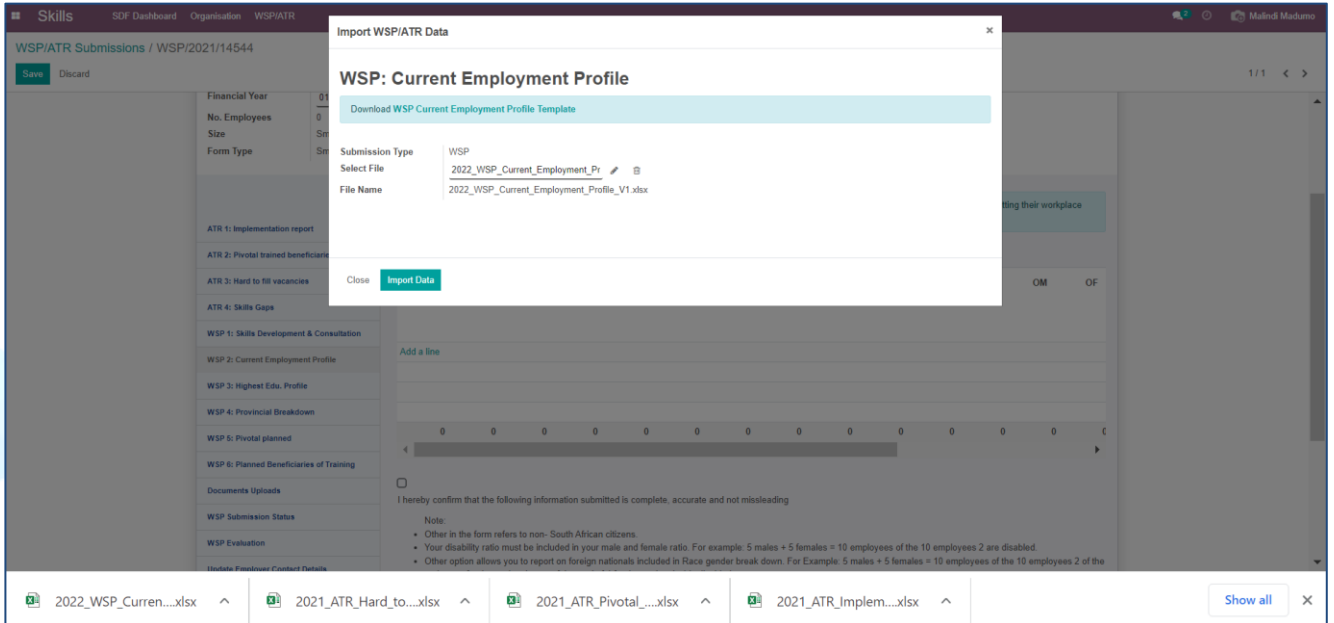
- Click **Current Employment Profile**
- On the pop-up screen, Click Download **Current Employment Profile** (As shown in STEP 2)
- The file is downloaded on your machine
- Click on **Upload file** then browse your machine and select the saved file
- Click **Import Data**

The Data is imported and populates on the system as shown below
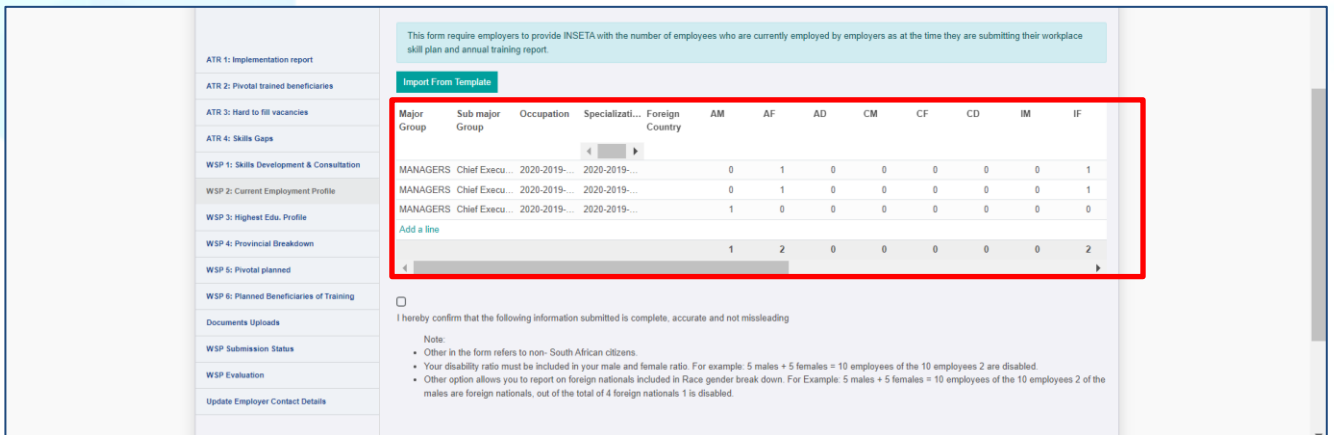
- Click **Highest Educational Profile**
- On the pop-up screen, Click Download **Highest Educational Profile** (As shown in STEP 2)
- The file is downloaded on your machine
- Click on **Upload file** then browse your machine and select the saved file
- Click **Import Data**

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

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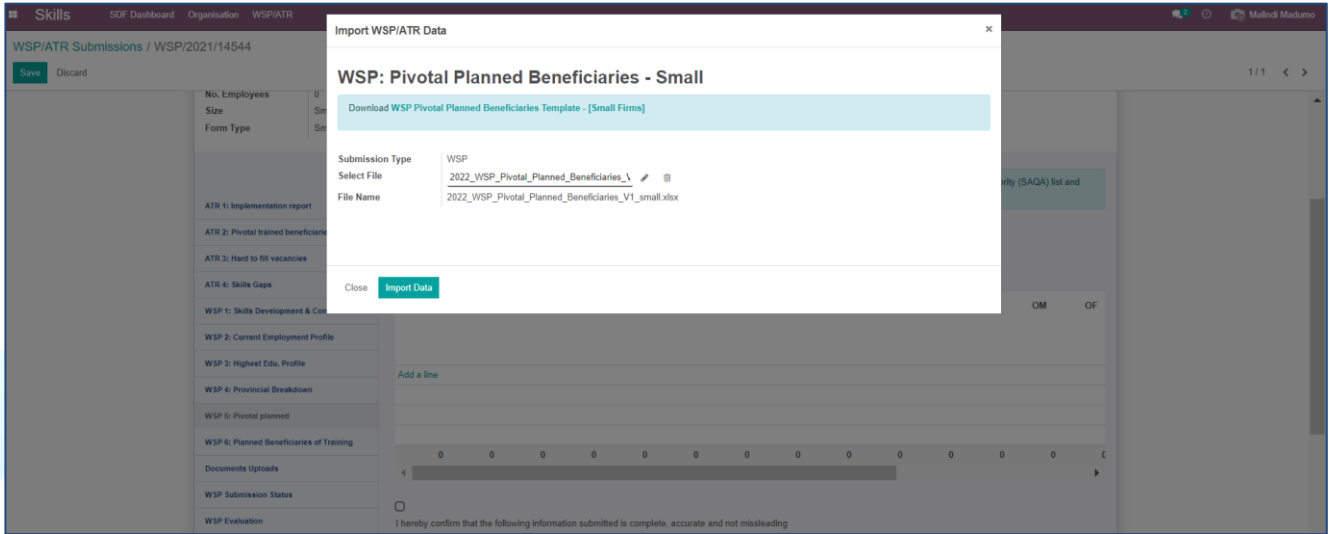
🖱 Click **Provincial Background**

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

- 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

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

👆 Click **Documents Upload**

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

The required documents are successfully uploaded

7.14 STEP 13- Download Authorisation Page

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

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

The Authorisation page is downloaded on the local machine

- 🖱 Double click on document to open

ATR YEAR 2022 AND WSP YEAR 2023 TEMPLATES

DHET Registered Name:PROVIDENCE CONSULTANTS & ACTUARIES

SETA Registered Name: PROVIDENCE CONSULTANTS & ACTUARIES

Company Size: Small Non-Levy Paying (1 - 49)

N000000015

SDF: Test Primary SDF

Submission Date: December 07, 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.
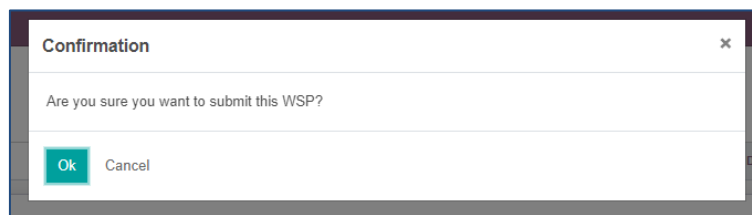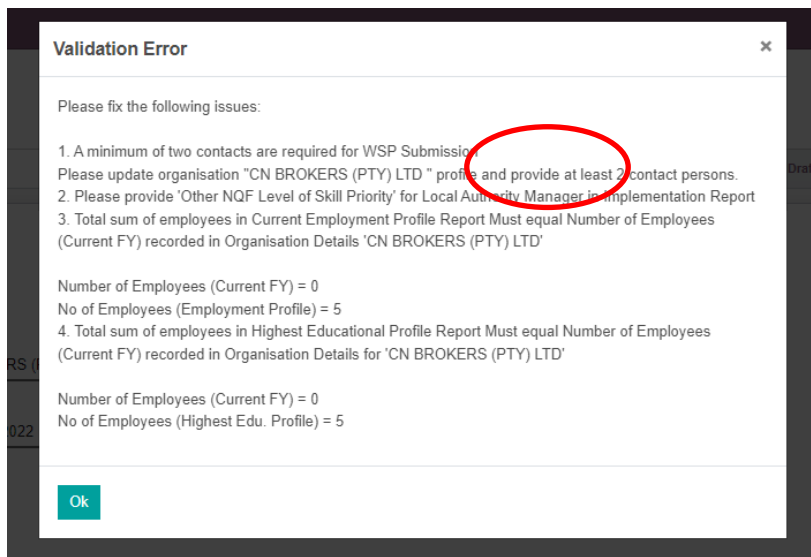
7.15   STEP 14- WSP Submission
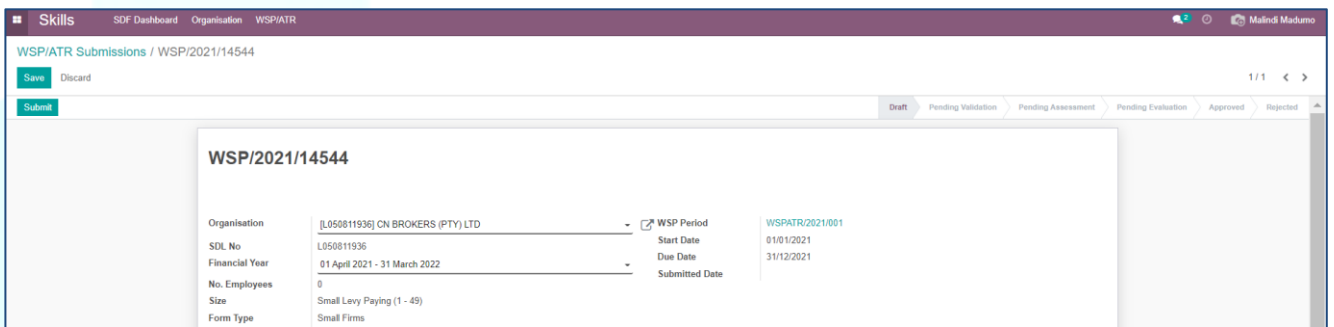
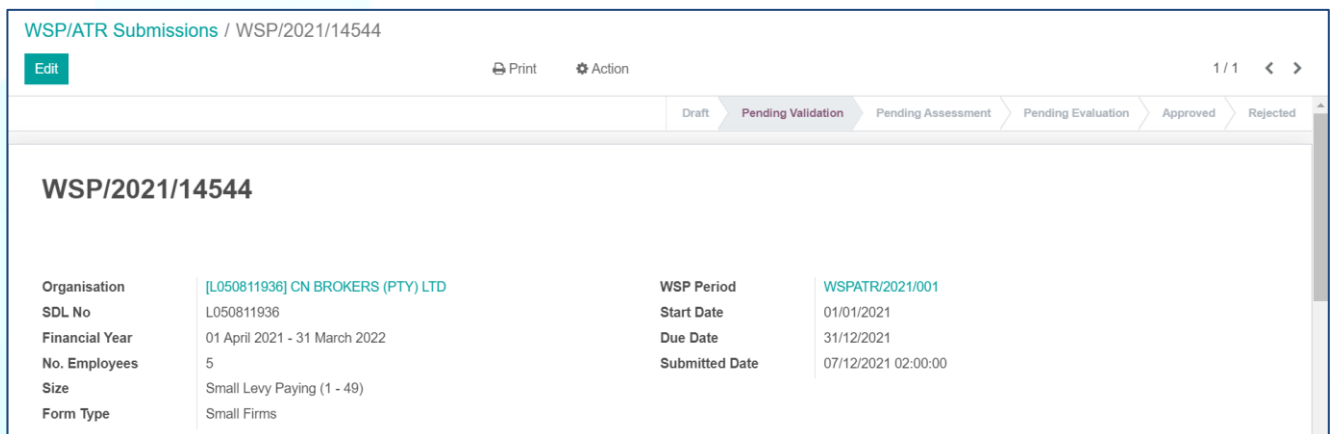🖱   Once all data is capture and documents are uploaded, Click on **Submit**

🖱   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*