



## **MIS IMPLEMENTATION**


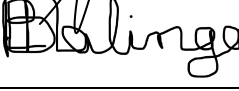

# **SKILLS MODULE TRAINING GUIDE** **Small Organisations**

***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		
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

<b>1 Document Review</b>	<b>2</b>
Version Control	2
<b>2 Introduction</b>	<b>5</b>
2.1 Objective	5
<b>3 Navigation</b>	<b>6</b>
3.1 System Access	6
3.2 Icons and terminology	6
<b>4 SDF Registration</b>	<b>8</b>
4.1 STEP 1- SDF Registration	8
4.2 STEP 2- Capture General Information	9
4.3 STEP 3- Complete Physical Address	10
4.4 STEP 4- Complete Postal Address	10
4.5 STEP 5- Capture Other Info	11
<b>5 Non-levy Organisation Registration</b>	<b>14</b>
5.1 STEP 1- Register a Non-levy organisation	14
5.2 STEP 2- Fill the General Information section	15
5.3 STEP 3- Capture Organisation Address	16
5.4 STEP 4- Capture Organisation contact	17
5.5 STEP 5- Fill in Other Info	17
<b>6 Update existing Organisation details</b>	<b>19</b>
6.1 Updating Organisation Details	19
6.2 Verify linked child companies	20
6.3 Update Organisation Contacts	21
6.4 Update CFO details	23
6.5 Update CEO details	24
6.6 Update Organisation's Banking details	25
<b>7 WSP ATR Submission</b>	<b>26</b>
7.1 STEP 1- System Login	26
7.2 STEP 1- Create WSP	26
7.3 STEP 2- Implementation Report	27
7.4 STEP 3- Pivotal trained beneficiaries	29
7.5 STEP 4- Hard to fill vacancies	30
7.6 STEP 5- Skills Gap	31
7.7 STEP 6- Skills Development & Consultation	33
7.8 STEP 7- Current Employment Profile	34

7.9	STEP 8- Highest Educational Profile .....	35
7.10	STEP 9- Provincial Background .....	36
7.11	STEP 10- Pivotal Planned .....	37
7.12	STEP 11- Planned Beneficiaries of Training.....	38
7.13	STEP 12- Documents Upload .....	39
7.14	STEP 13- Download Authorisation Page.....	40
7.15	STEP 14- WSP Submission .....	41

## 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

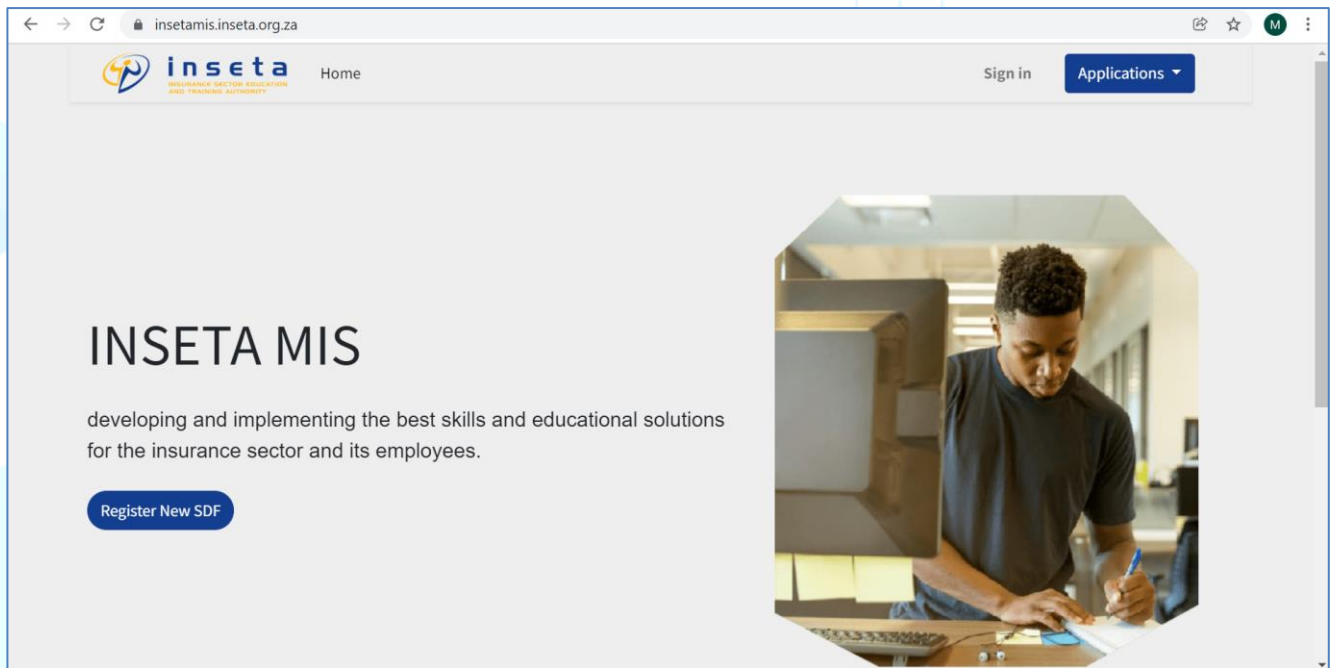
The objective of this training manual is to provide a step-by-step guide on how to execute the following processes on the system:

- 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

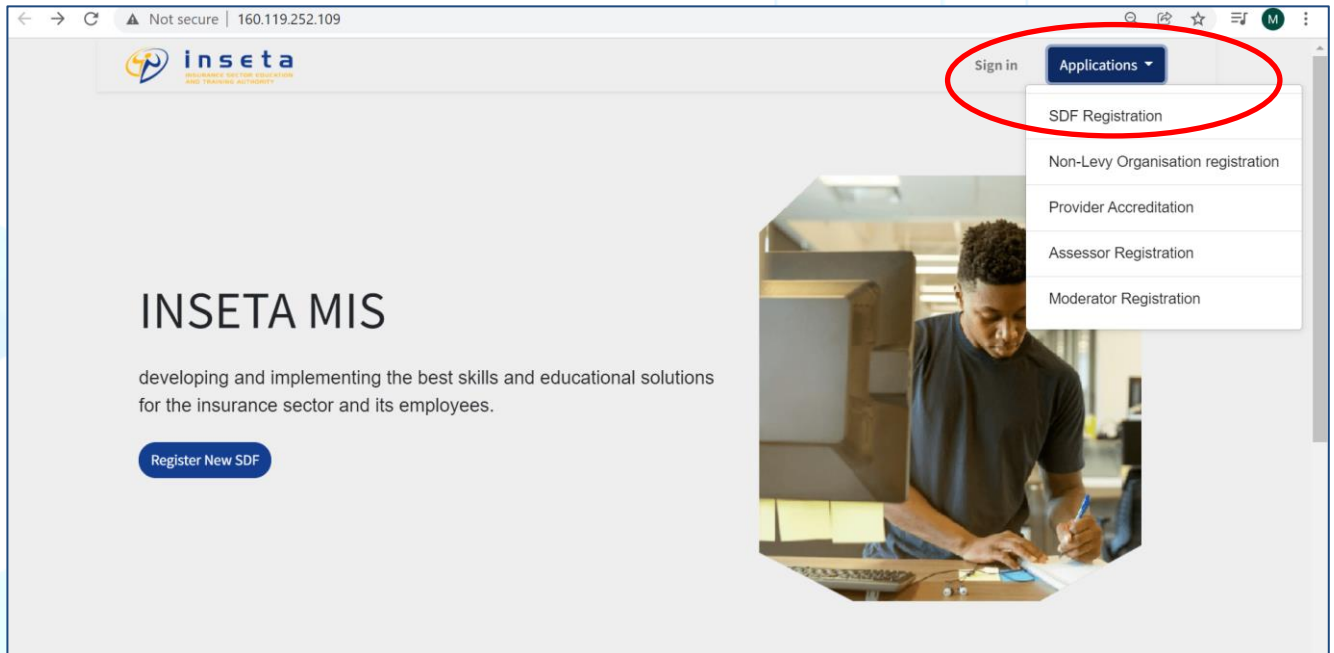
The following table includes abbreviations or notations that are used in the document and on the system.

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

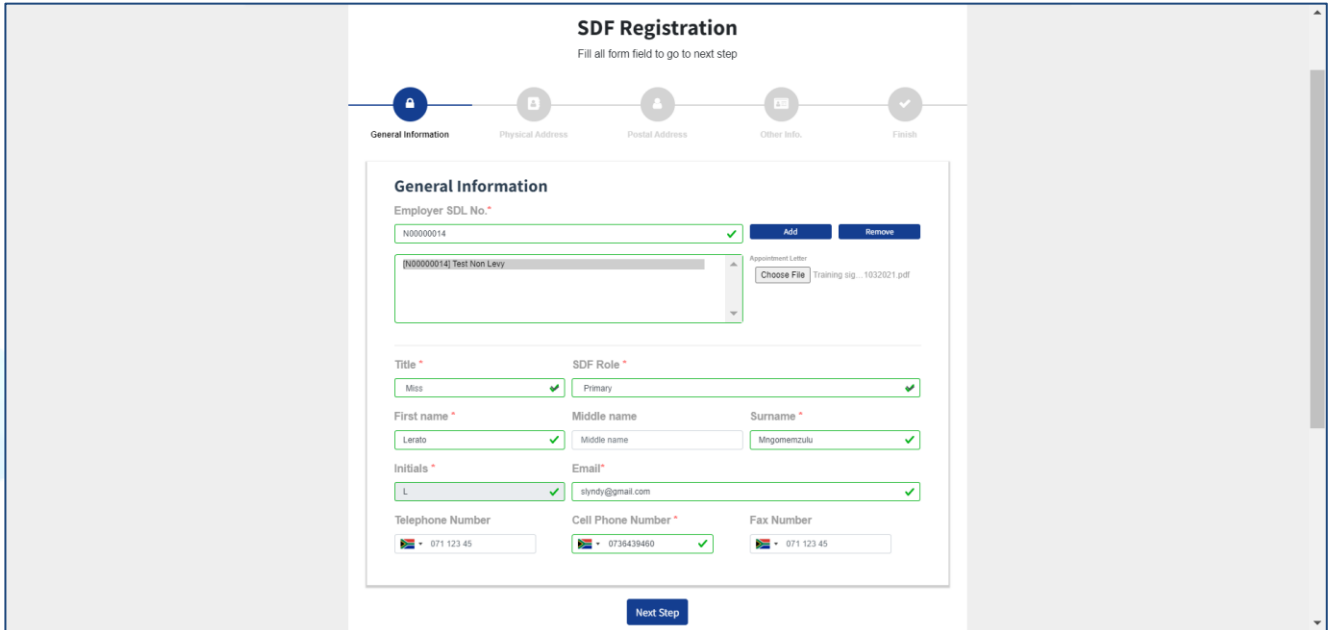


- ☞ On the INSETA MIS landing page, Click on **Applications** to expand dropdown menu
- ☞ Then, click on **SDF Registration**

The SDF Registration form is displayed



## 4.2 STEP 2- Capture General Information



**SDF Registration**  
Fill all form field to go to next step

General Information   Physical Address   Postal Address   Other Info.   Finish

**General Information**

Employer SDL No.\*  
N00000014 ☐ Add




Appointment Letter  
[N00000014] Test Non Levy  Training sig... 1032021.pdf

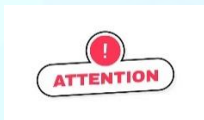
Title \*   SDF Role \*  
Miss ☐ Primary ☐

First name \*   Middle name   Surname \*  
Lerato ☐ Middle name   Mngomemzulu ☐

Initials \*   Email\*  
L ☐ stndy@gmail.com ☐

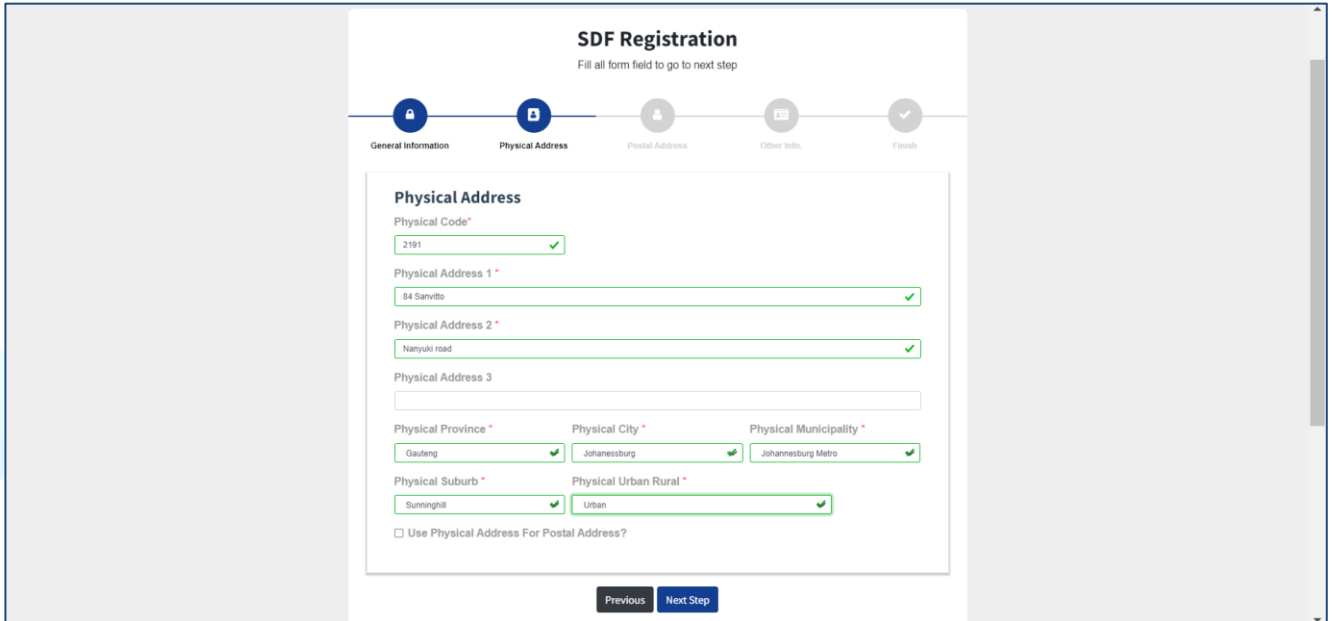
Telephone Number   Cell Phone Number \*   Fax Number  
+ 071 123 45   + 0738439480 ☐   + 071 123 45

-  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



**SDF Registration**  
Fill all form field to go to next step

General Information Physical Address Postal Address Other Info. Finish

**Physical Address**

Physical Code\*  
2191 ✓

Physical Address 1\*  
84 Sanvito ✓

Physical Address 2\*  
Nanyuki road ✓

Physical Address 3

Physical Province\* Gauteng ✓ Physical City\* Johannesburg ✓ Physical Municipality\* Johannesburg Metro ✓

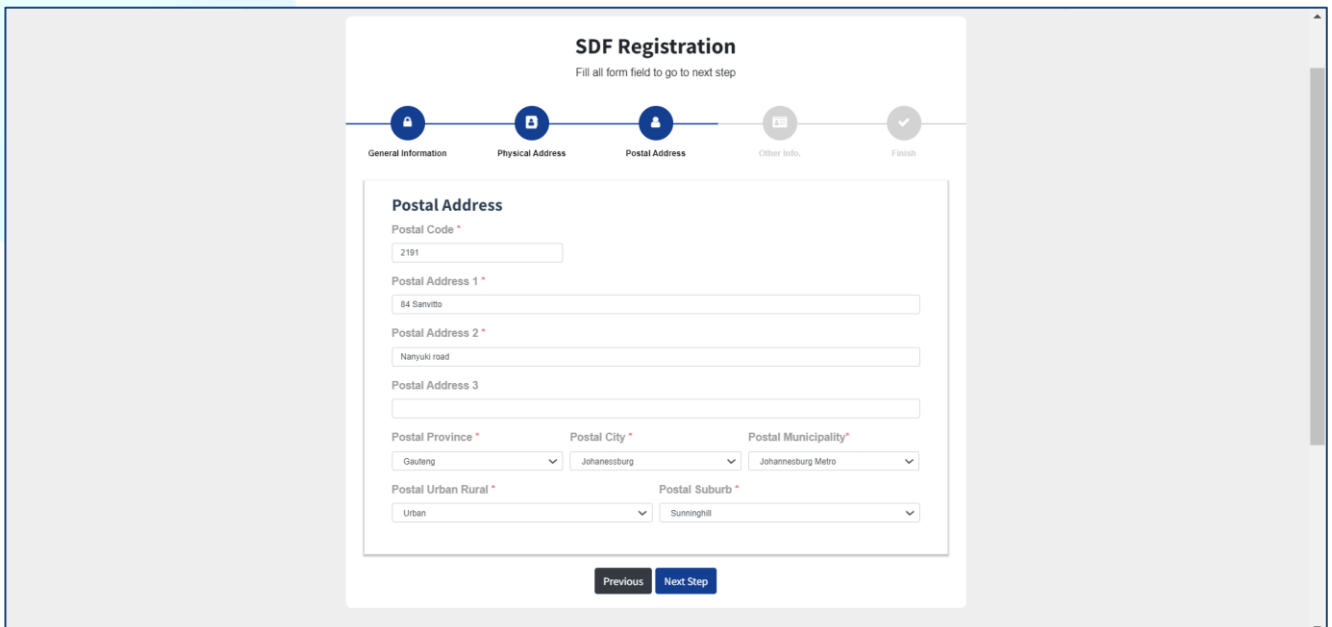
Physical Suburb\* Sunninghill ✓ Physical Urban Rural\* Urban ✓

☐ Use Physical Address For Postal Address?

Previous Next Step

- ☞ 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



**SDF Registration**  
Fill all form field to go to next step

General Information Physical Address Postal Address Other Info. Finish

**Postal Address**

Postal Code\*  
2191

Postal Address 1\*  
84 Sanvito

Postal Address 2\*  
Nanyuki road

Postal Address 3

Postal Province\* Gauteng Postal City\* Johannesburg Postal Municipality\* Johannesburg Metro

Postal Urban Rural\* Urban Postal Suburb\* Sunninghill

Previous Next Step

- ☞ 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 \*

South Africa   Black African ✓

Citizen Residential Status \*   Nationality   Home Language

South Africa ✓     seSotho ✓

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

8902070288088 ✓   07/02/1989 ✓   Female ✓

**Status**

Socio Economic Status \*   Disability Status \*

Employed ✓   None ✓

Highest Education \*   Highest Education Description

Diploma ✓   Diploma in Financial Administration

Current Occupation \*   Years In Occupation \*

Supervisor ✓   5 ✓

Experience \*

Training and coaching ✓

🖱️ Capture Other information

**inseta**   Sign in   Applications ▾

General Comments

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

Name of Accredited Training Provider

Milpark Business School ✓

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

Yes ✓

Registration Date

2021-12-06

SDF Certificate: Select upload

[Choose File](#) No file chosen

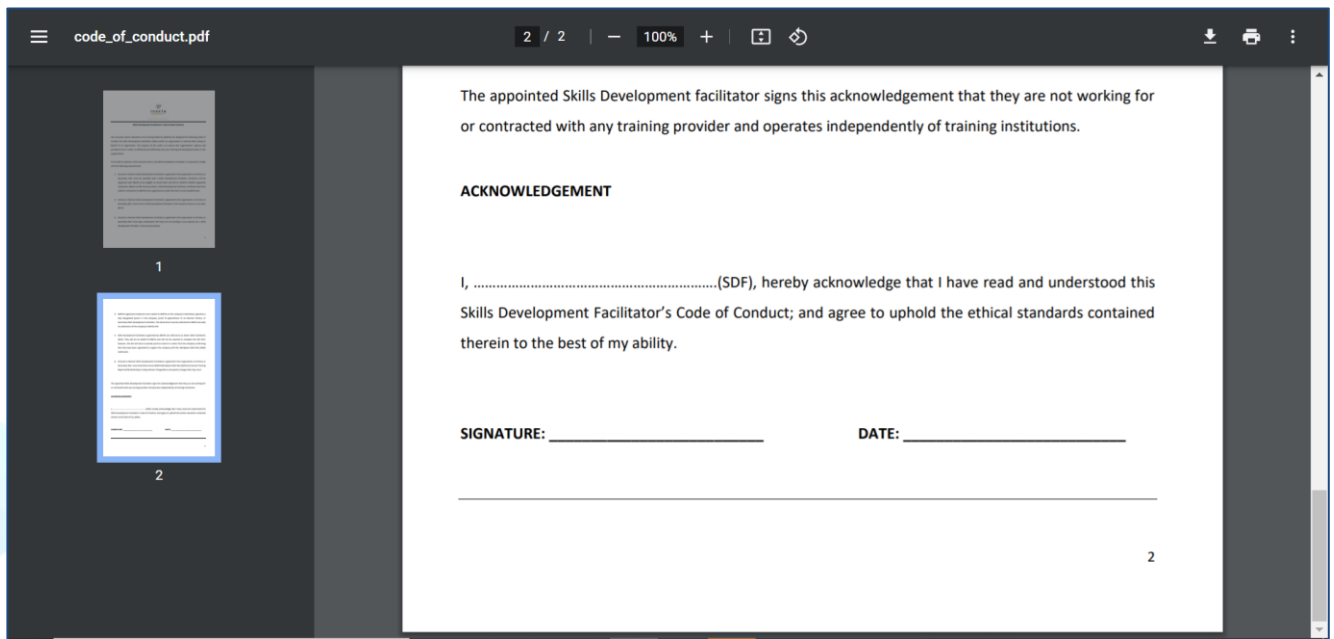
Download [Here](#) Sign and Upload the Code Of Conduct \*

[Choose File](#) No file chosen

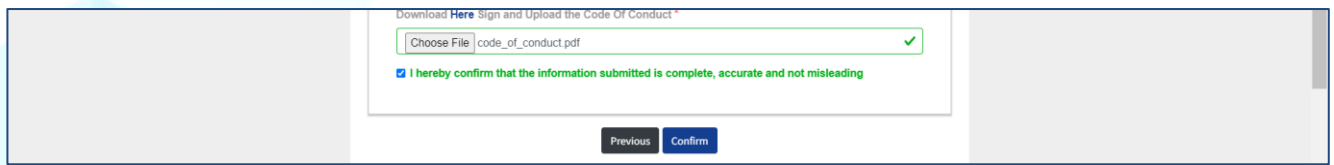
☐ I hereby confirm that the information submitted is complete, accurate and not misleading

[Previous](#) [Confirm](#)

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



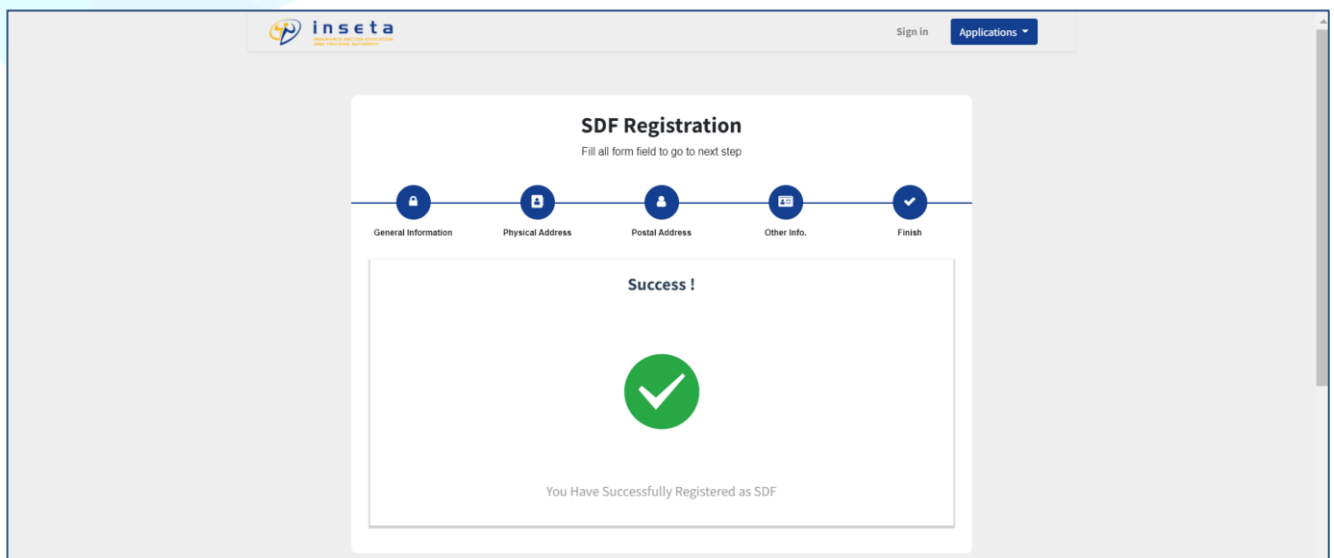
 Sign the Code of Conduct



 Upload the signed Code of Conduct

 Click on the declaration checkbox **I hereby confirm that the information is complete, accurate and not misleading**

 Click **Confirm**





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

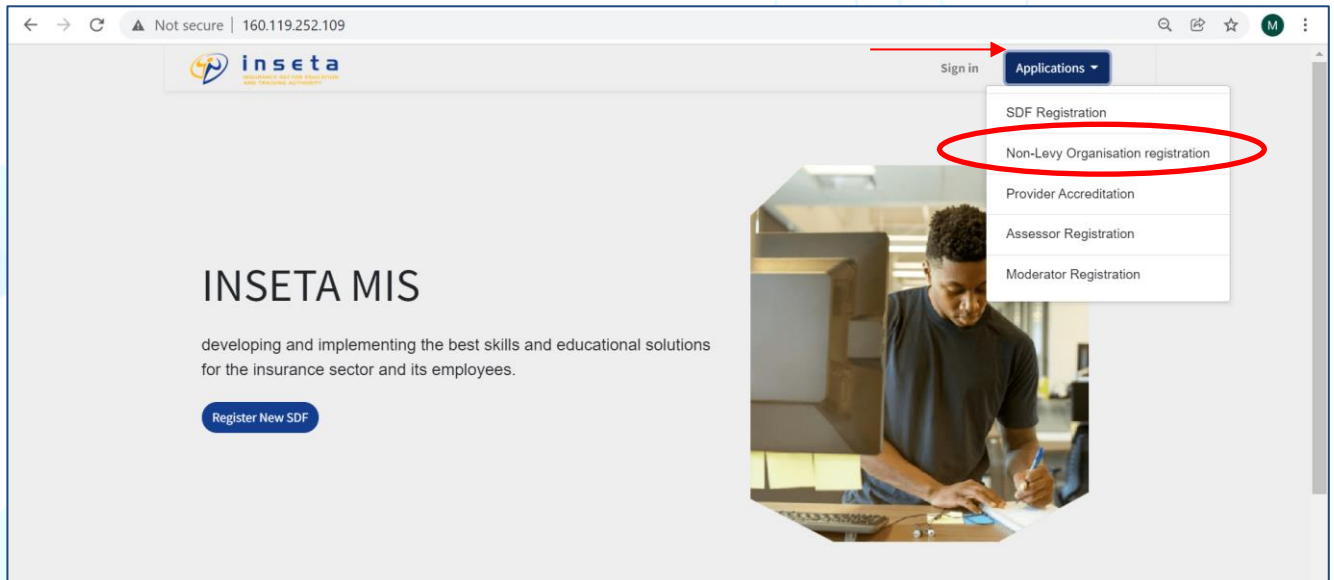
***Once application is finalised, the SDF will receive email with system Login details***

---

## 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.

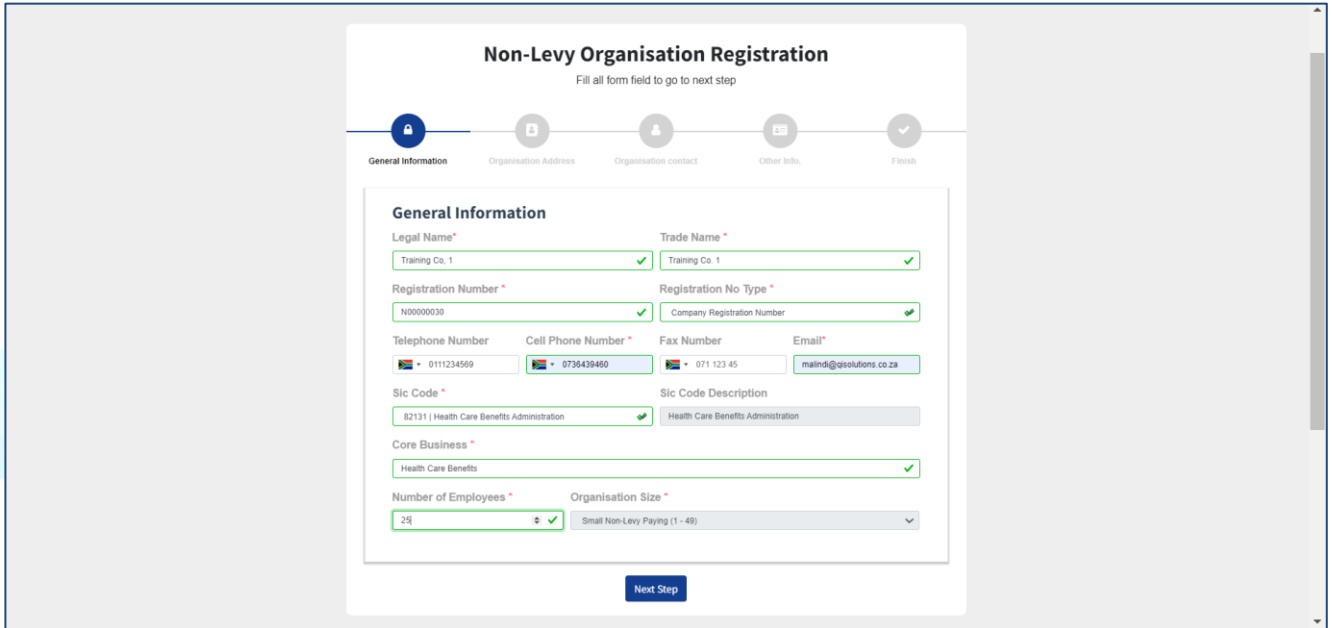



- 🔗 On the INSETA MIS landing page, Click on **Applications** to expand dropdown menu
- 🔗 Then, click on **Non-levy Organisation registration**

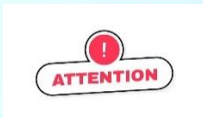


The Non-levy Organisation registration form is displayed

## 5.2 STEP 2- Fill the General Information section



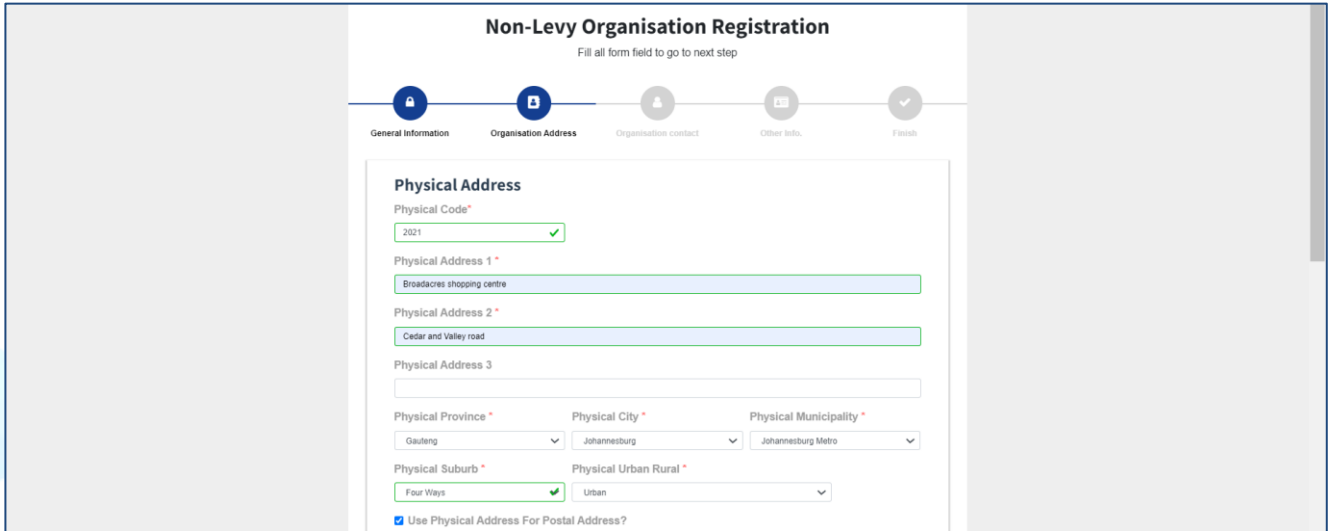
 Capture Organisation general information and then click **Next Step**



**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

General Information Organisation Address Organisation contact Other Info. Finish

**Physical Address**

Physical Code \*  
2021 ✓

Physical Address 1 \*  
Broadacres shopping centre

Physical Address 2 \*  
Cedar and Valley road

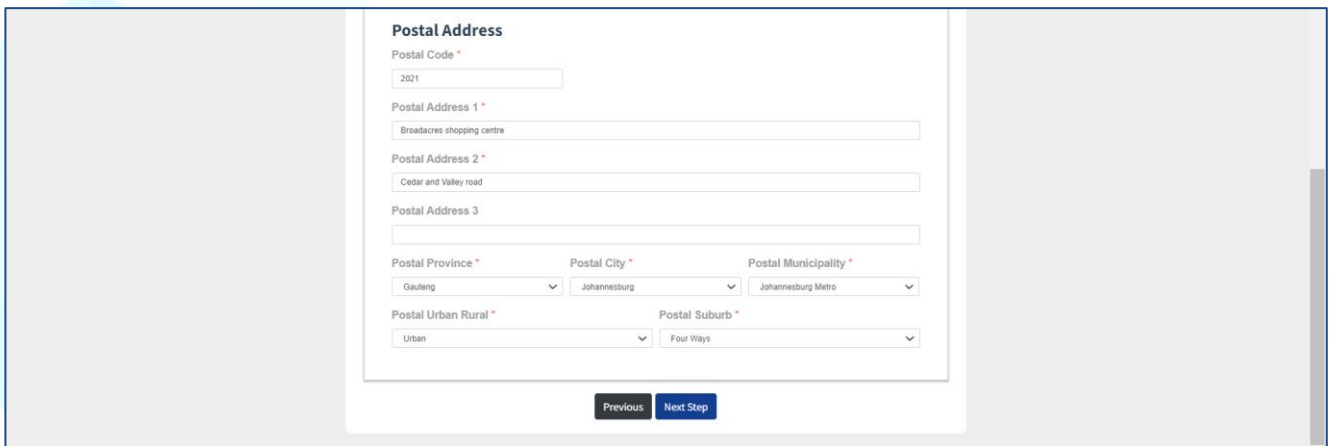
Physical Address 3

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

Postal Province \* Gauteng  
Postal City \* Johannesburg  
Postal Municipality \* Johannesburg Metro

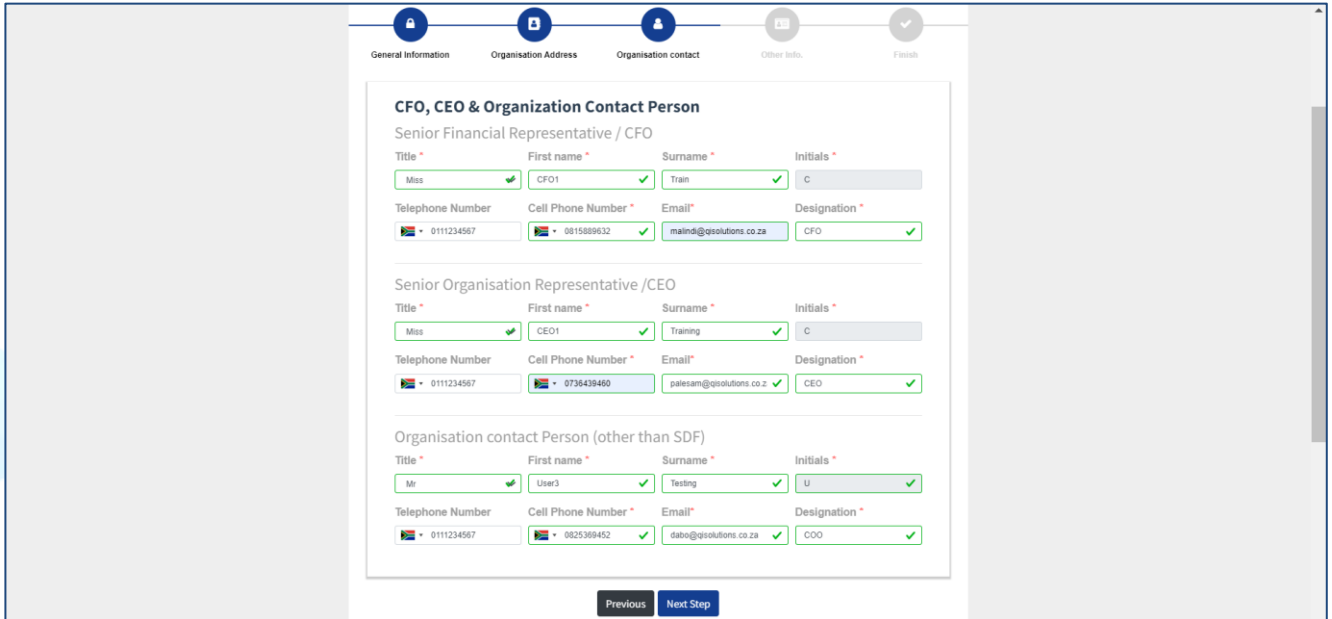
Postal Urban Rural \* Urban  
Postal Suburb \* Four Ways

Previous Next Step

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



## 5.4 STEP 4- Capture Organisation contact



**CFO, CEO & Organization Contact Person**

Senior Financial Representative / CFO

Title \* First name \* Surname \* Initials \*

Miss ✓ CFO1 ✓ Train ✓ C

Telephone Number Cell Phone Number \* Email \* Designation \*

0111234567 0815889632 mailind@qisolutions.co.za CFO ✓

Senior Organisation Representative /CEO

Title \* First name \* Surname \* Initials \*

Miss ✓ CEO1 ✓ Training ✓ C

Telephone Number Cell Phone Number \* Email \* Designation \*

0111234567 0736439460 palesam@qisolutions.co.za CEO ✓

Organisation contact Person (other than SDF)

Title \* First name \* Surname \* Initials \*

Mr ✓ User3 ✓ Testing ✓ U ✓

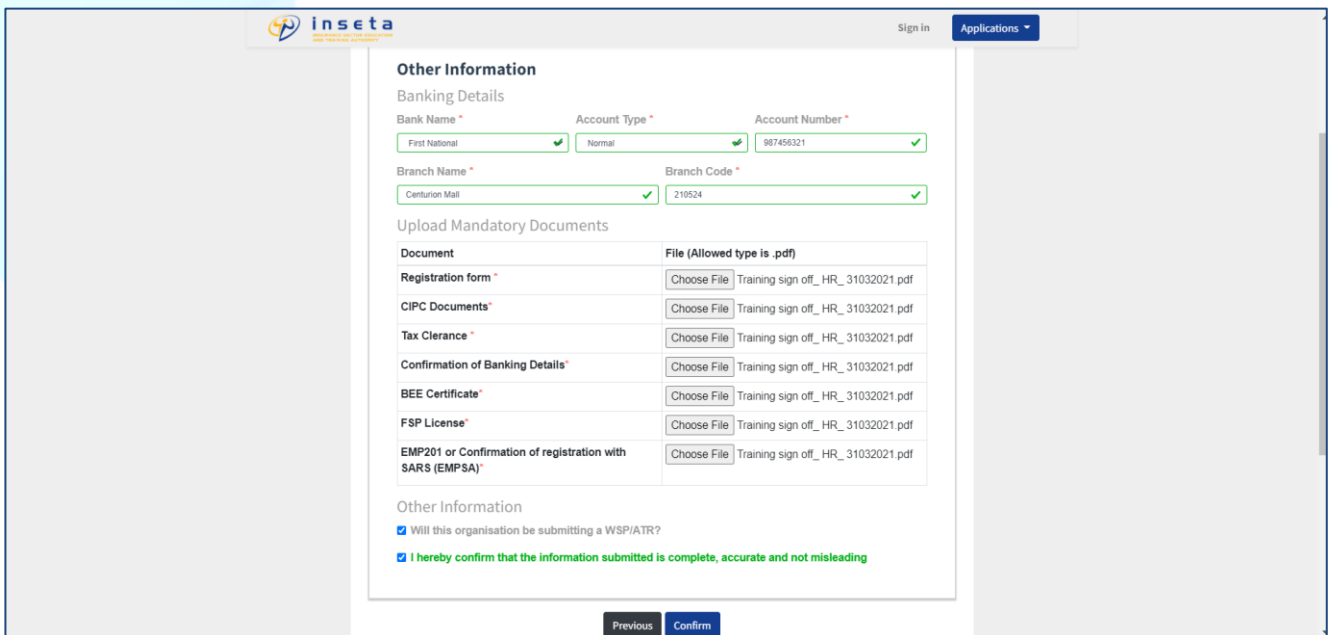
Telephone Number Cell Phone Number \* Email \* Designation \*

0111234567 0825369452 daboo@qisolutions.co.za COO ✓

Previous Next Step

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

## 5.5 STEP 5- Fill in Other Info



**Other Information**

Banking Details

Bank Name \* Account Type \* Account Number \*

First National ✓ Normal ✓ 987456321 ✓

Branch Name \* Branch Code \*

Centurion Mail ✓ 219524 ✓

Upload Mandatory Documents

Document	File (Allowed type is .pdf)
Registration form *	Choose File Training sign off_ HR_ 31032021.pdf
CIPC Documents *	Choose File Training sign off_ HR_ 31032021.pdf
Tax Clearance *	Choose File Training sign off_ HR_ 31032021.pdf
Confirmation of Banking Details *	Choose File Training sign off_ HR_ 31032021.pdf
BEE Certificate *	Choose File Training sign off_ HR_ 31032021.pdf
FSP License *	Choose File Training sign off_ HR_ 31032021.pdf
EMP201 or Confirmation of registration with SARS (EMPISA) *	Choose File Training sign off_ HR_ 31032021.pdf

Other Information

☒ Will this organisation be submitting a WSP/ATR?

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

Previous Confirm


- ☞ 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**

### Non-Levy Organisation Registration

Fill all form field to go to next step

General Information
Organisation Address
Organisation contact
Other Info.
Finish

Success !



Your Registration is Successful

Previous
Next Step



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

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



**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 REGISTRATION 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.

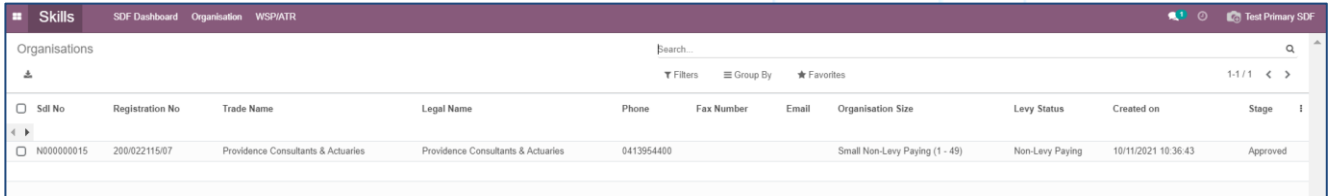
Yours in Skills Development

**Adeline Odette Singh**



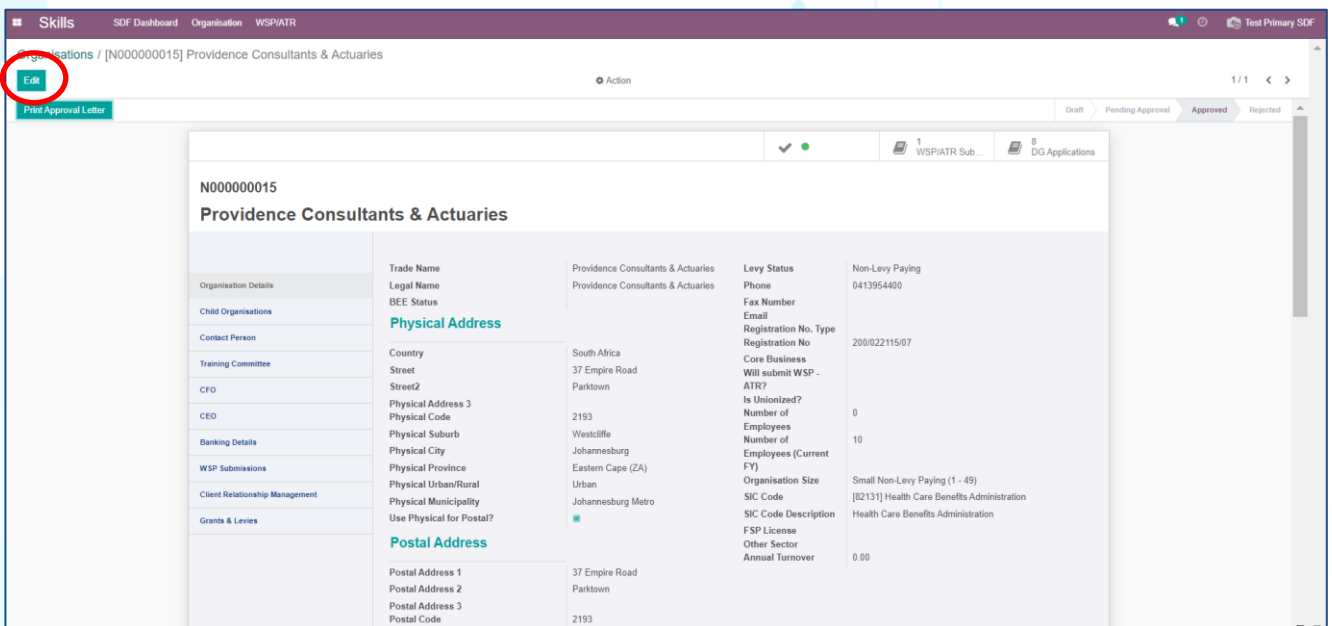
## 6 Update existing Organisation details

### 6.1 Updating Organisation Details



Sell 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



Organisations / [N000000015] Providence Consultants & Actuaries

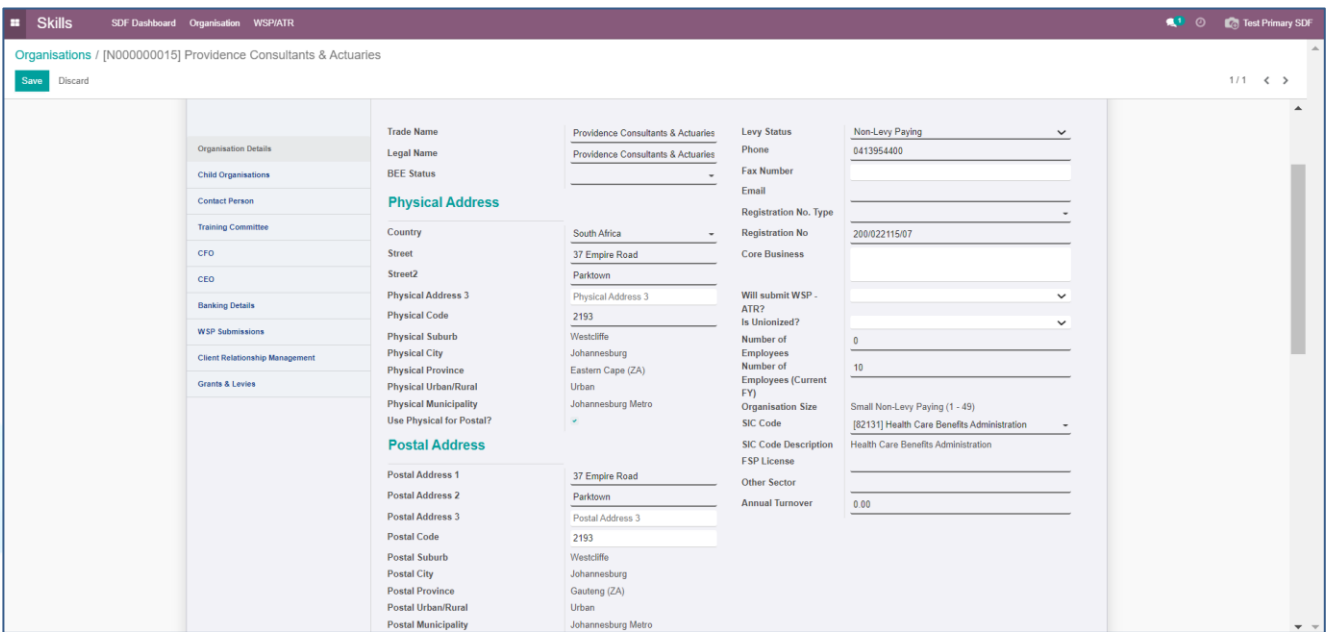
**Edit** Action



1 WSP/ATR Sub... 8 DG Applications

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

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

Click **Edit** to enable editing Organisation details

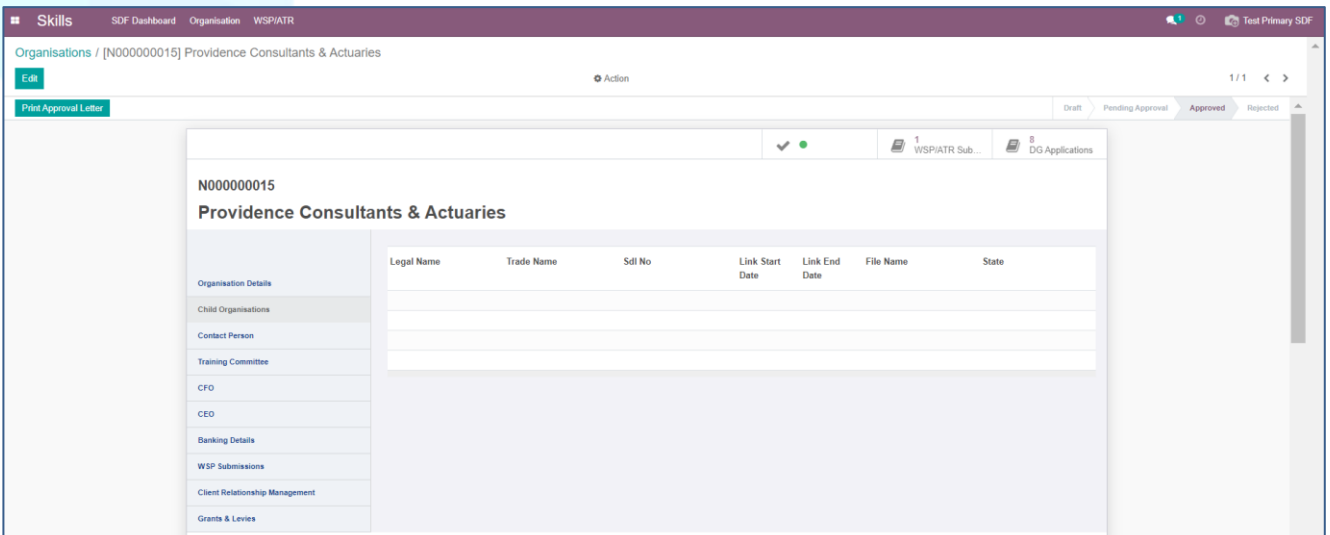




-  Capture changes and confirm details
-  Click **Save**



*The Organisation details are successfully updated.*

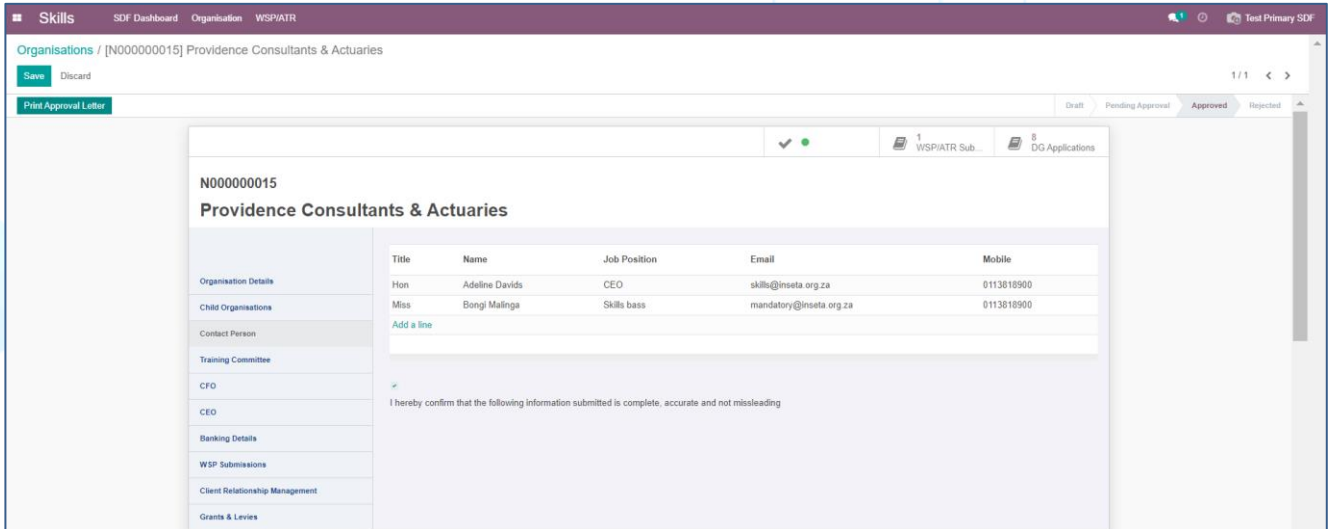
## 6.2 Verify linked child companies.



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

Click **Save**

## 6.3 Update Organisation Contacts



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

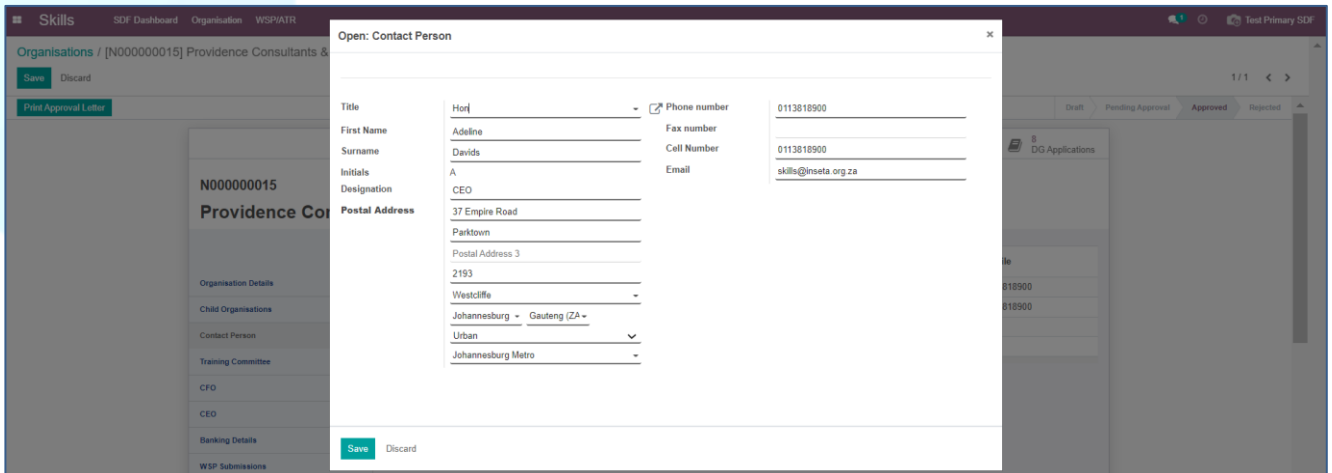
N000000015  
Providence Consultants & Actuaries

Title	Name	Job Position	Email	Mobile
Hon	Adeline Davids	CEO	skills@inseta.org.za	0113818900
Miss	Bongi 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

N000000015  
Providence Consultants & Actuaries

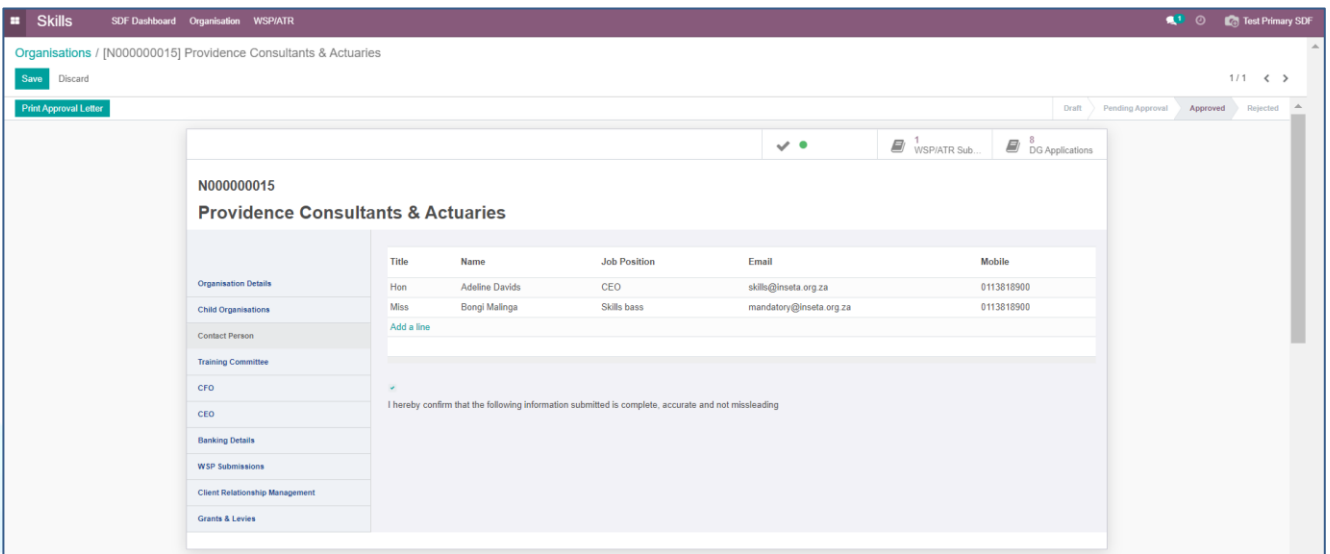
Open: Contact Person

Title: Hon | First Name: Adeline | Surname: Davids | Initials: A | Designation: CEO | Phone number: 0113818900 | Fax number: 0113818900 | Cell Number: 0113818900 | Email: skills@inseta.org.za

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

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

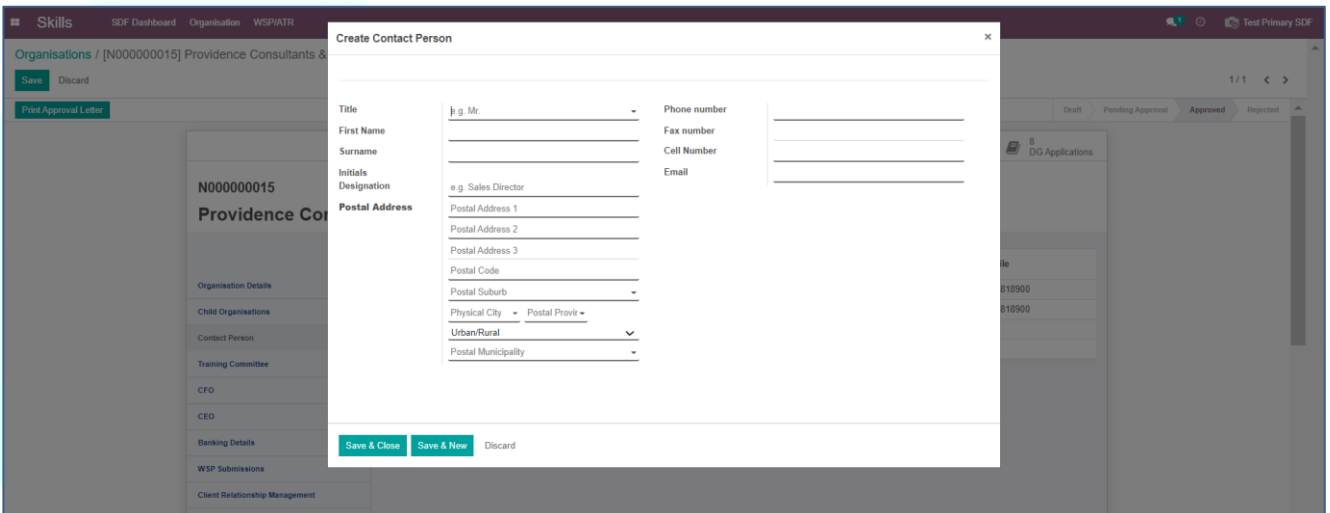
**N000000015**  
**Providence Consultants & Actuaries**

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**

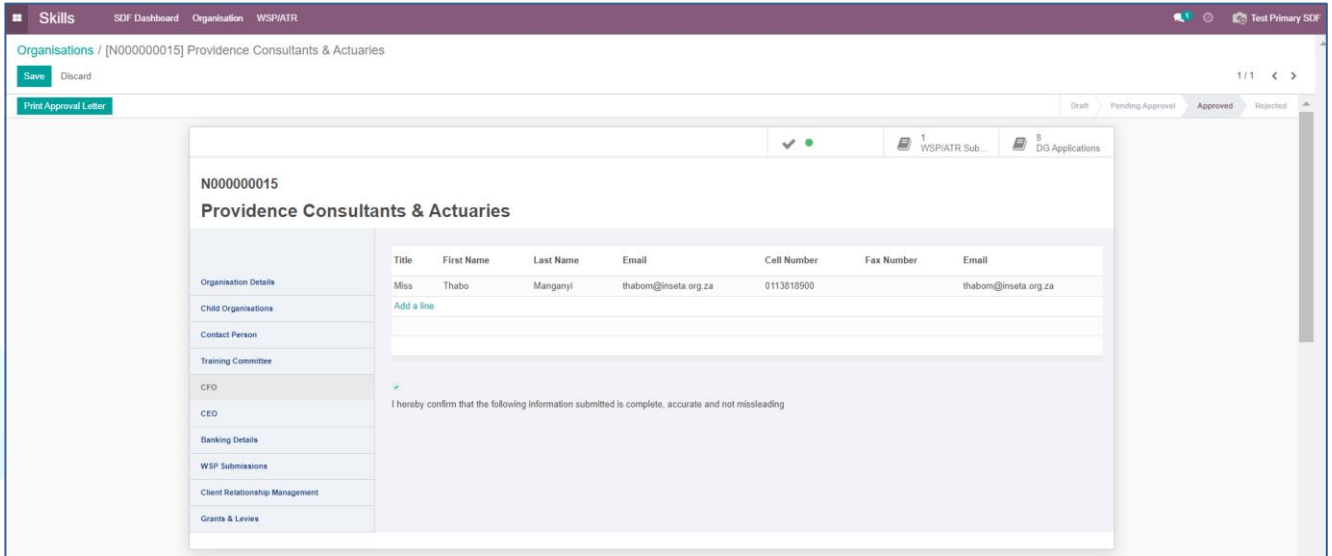
**Create Contact Person**

Title:  Phone number:   
 First Name:  Fax number:   
 Surname:  Cell Number:   
 Initials:  Email:   
 Designation:   
 Postal Address:

Save & Close | Save & New | Discard

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

## 6.4 Update CFO details

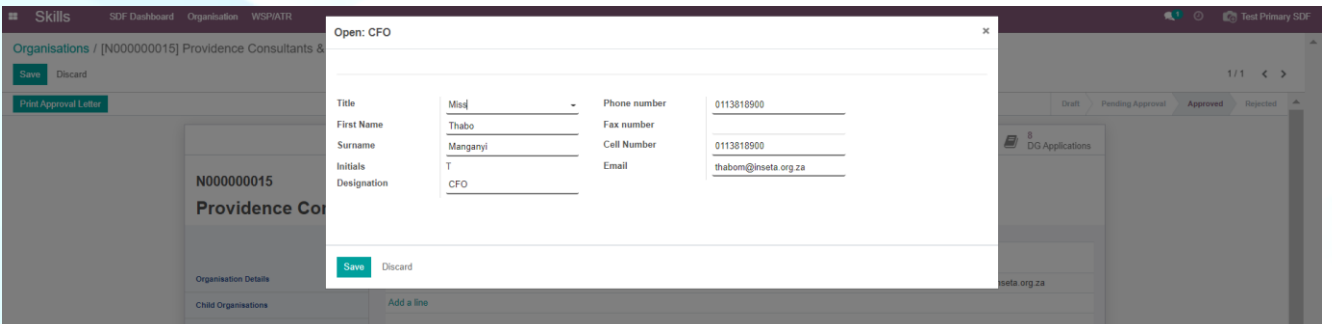


The screenshot shows the 'CFO' tab selected in the left-hand menu. The main area displays a table with the following data:

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

Below the table, there is a confirmation statement: "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



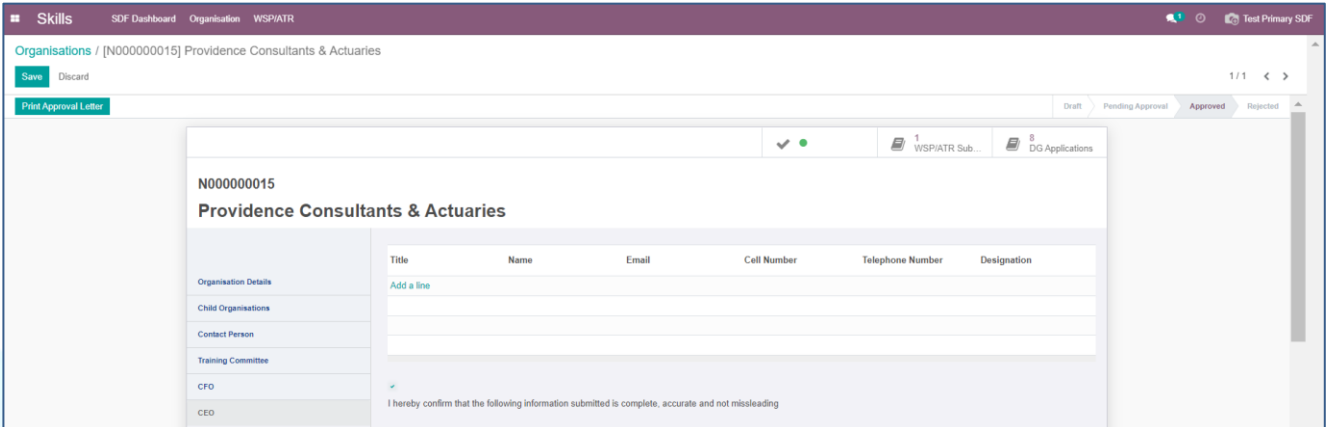
The screenshot shows the 'Open: CFO' dialog box. The fields are as follows:

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

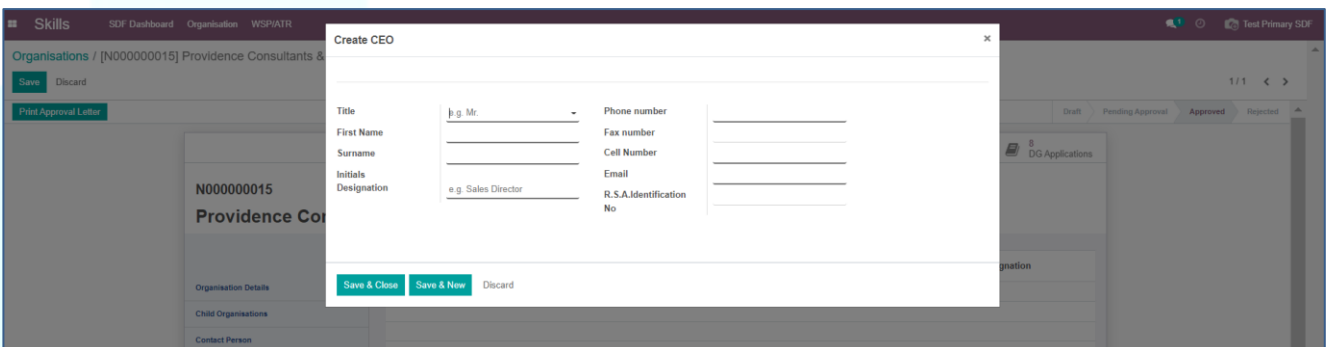
At the bottom of the dialog box, there are 'Save' and 'Discard' buttons.

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

## 6.5 Update CEO details



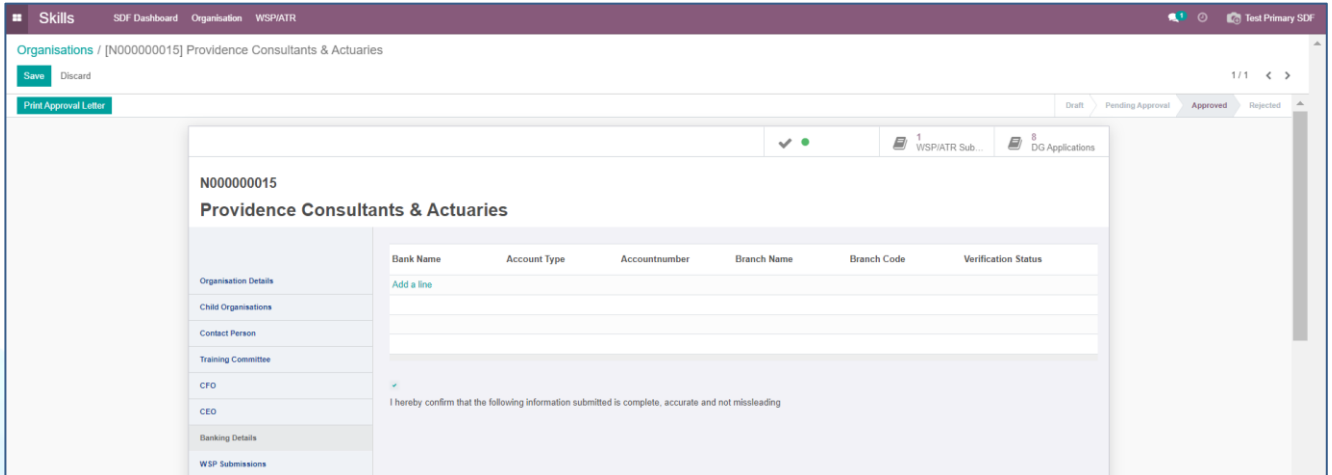
- ☞ Click on **CEO** tab
- ☞ Click **Edit** to enable editing
- ☞ Click on the Contact line item



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

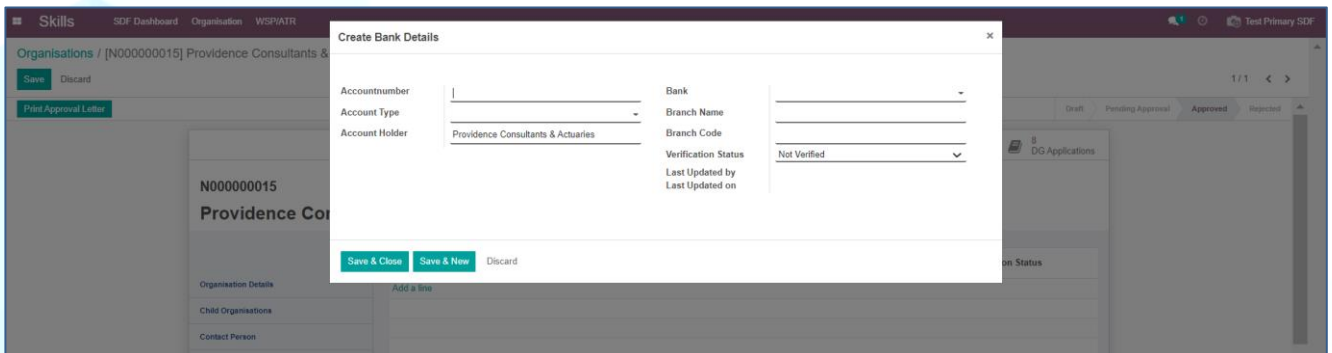


## 6.6 Update Organisation's Banking details



The screenshot shows the 'Banking Details' tab selected in the left sidebar. The main area displays a table with columns: Bank Name, Account Type, Accountnumber, Branch Name, Branch Code, and Verification Status. There is an 'Add a line' link below the table. A confirmation message at the bottom states: '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**



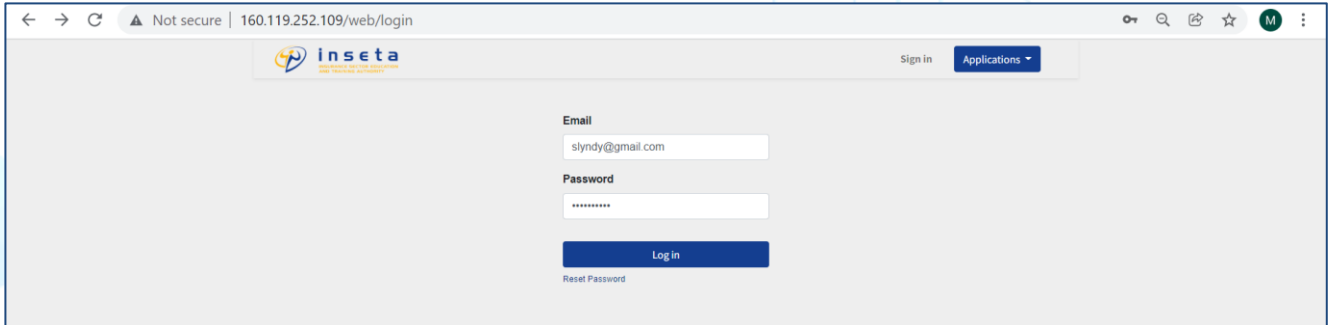
The 'Create Bank Details' modal form is open, showing fields for: Accountnumber, Account Type, Account Holder, Bank, Branch Name, Branch Code, Verification Status, Last Updated by, and Last Updated on. The 'Save & Close' button is highlighted.

- ☞ 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

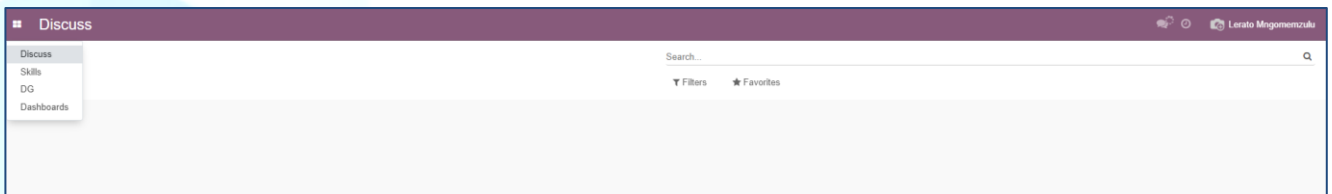
### 7.1 STEP I- System Login



The screenshot shows a web browser window with the URL 160.119.252.109/web/login. The page features the Inseta logo and a login form with fields for Email (slyndy@gmail.com) and Password (masked with asterisks). A 'Log in' button is present, along with a 'Reset Password' link. The browser's address bar shows 'Not secure' and the page has a 'Sign in' button and an 'Applications' dropdown menu.

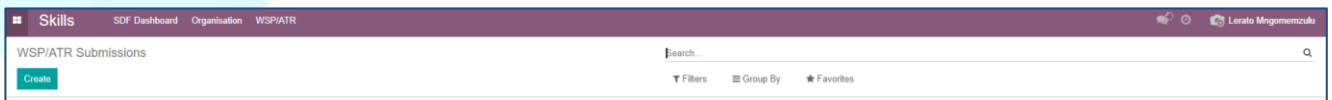
🖱️ Login as SDF once application is approved

### 7.2 STEP I- Create WSP



The screenshot shows the 'Skills' menu in the Inseta system. The menu is open, displaying options: Discuss, Skills, DG, and Dashboards. The 'Skills' option is highlighted. The top navigation bar includes a search bar and the user's name, Lerato Mngomezulu.

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



The screenshot shows the 'Skills' dashboard in the Inseta system. The dashboard has a header with 'Skills' and 'WSP/ATR Submissions'. A 'Create' button is visible in the top left corner. The dashboard also includes a search bar and options for 'Filters', 'Group By', and 'Favorites'.

🖱️ Click **Create**

WSP/ATR Submissions / New

[Save](#) [Discard](#)

[Submit](#)

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

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

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 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 Inseta 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 Edits 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 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 Inseta Funding Other Funding Company Funding AM AF AD CM CF CD IM IF ID

Add a line

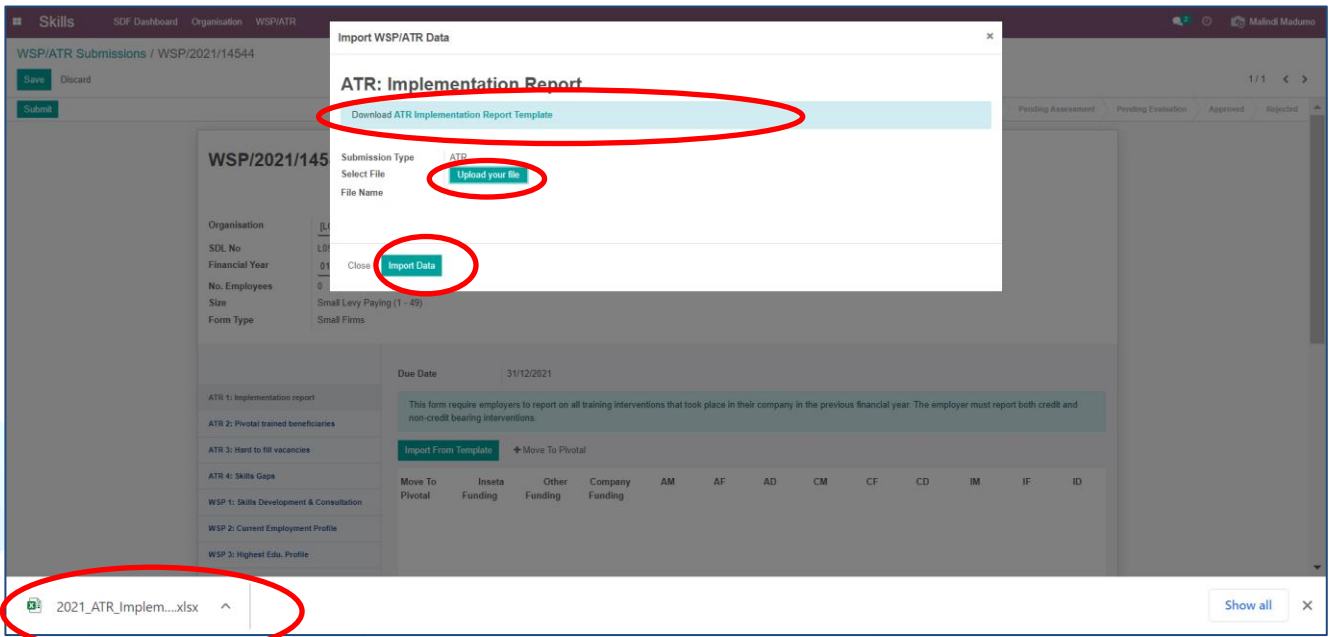
0.00 0.00 0.00 0 0 0 0 0 0 0 0 0 0

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

Note:

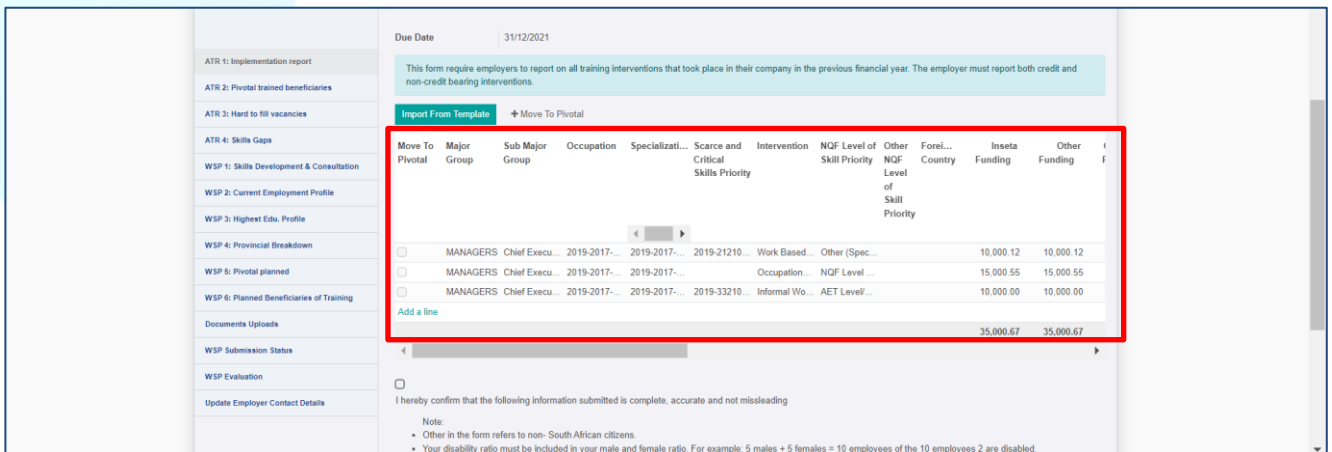
- Other in the form refers to non- South African citizens.
- Your disability ratio must be included in your male and female ratio. For example: 5 males + 5 females = 10 employees of the 10 employees 2 are disabled.
- Other option allows you to report on foreign nationals included in Race gender break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

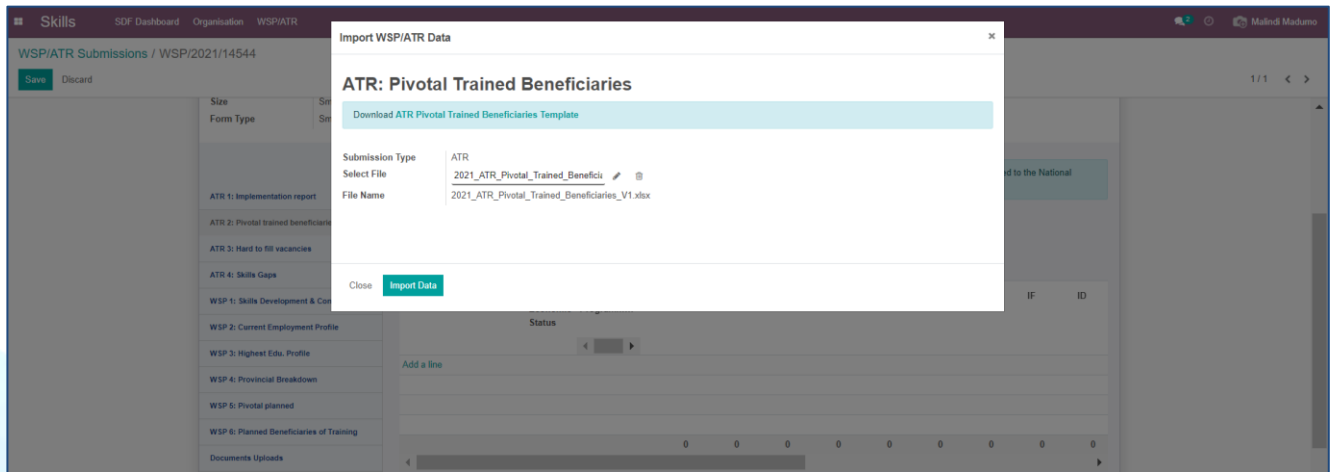


Move To Pivotal	Major Group	Sub-Major Group	Occupation	Specialization	Intervention	NQF Level of Skill Priority	Other NQF Level of Skill Priority	Fore... Country	Inseta Funding	Other Funding
<input type="checkbox"/>	MANAGERS	Chief Execu...	2019-2017...	2019-2017...	2019-21210...	Work Based...	Other (Spec...		10,000.12	10,000.12
<input type="checkbox"/>	MANAGERS	Chief Execu...	2019-2017...	2019-2017...		Occupation...	NQF Level...		15,000.55	15,000.55
<input type="checkbox"/>	MANAGERS	Chief Execu...	2019-2017...	2019-2017...	2019-33210...	Informal Wo...	AET Level...		10,000.00	10,000.00
									35,000.67	35,000.67



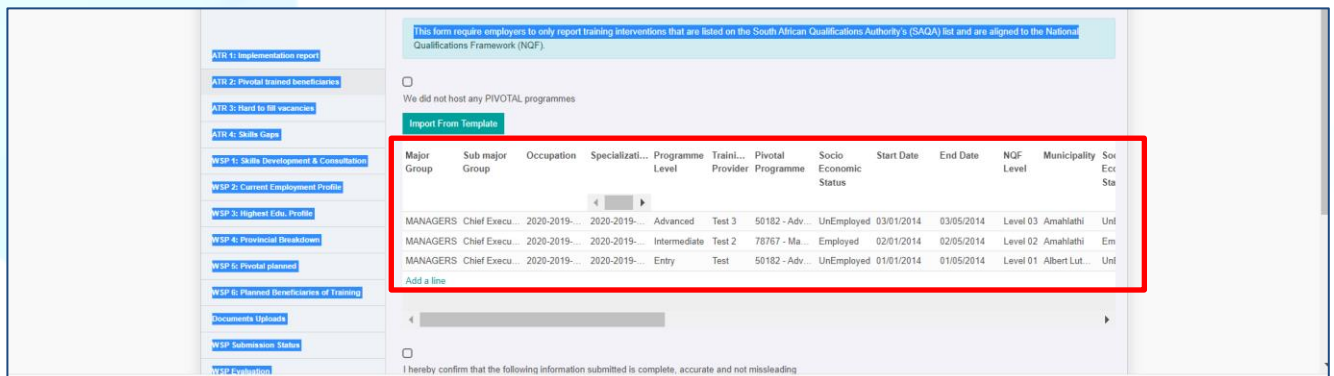
**Always remember to tick the declaration checkbox "I Hereby confirm that the following information submitted is complete, accurate and not misleading"**

## 7.4 STEP 3- Pivotal trained beneficiaries

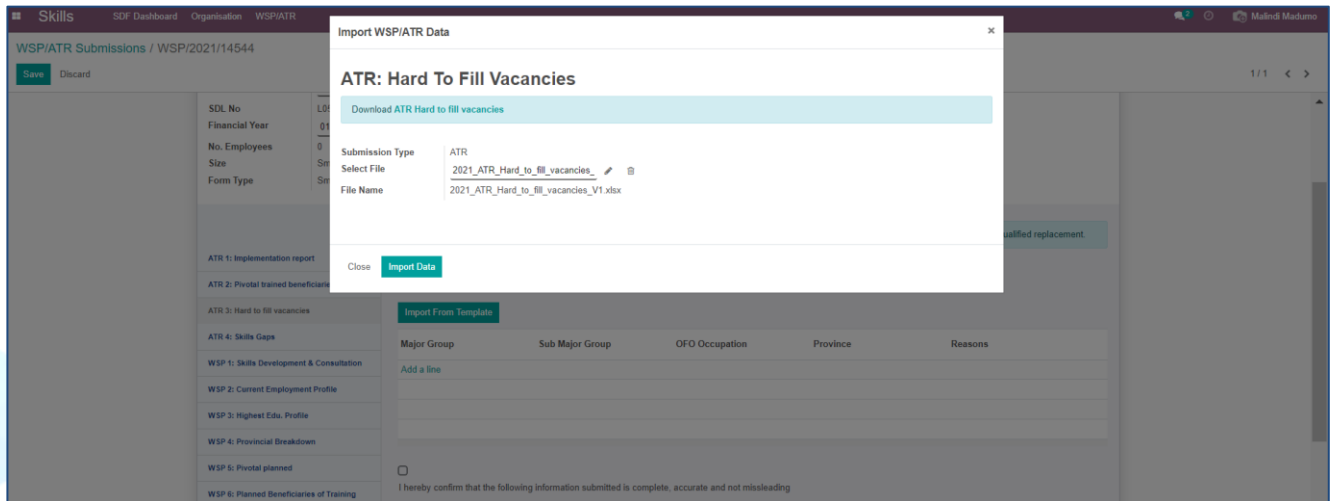


- ☞ Click Download **ATR Pivotal Trained Beneficiaries Template**
- ☞ On the pop-up screen, Click **Download ATR Pivotal Trained Beneficiaries Template** (As shown in STEP 2)
- ☞ The file is downloaded on your machine
- ☞ Click on **Upload file** then browse your machine and select the saved file
- ☞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

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

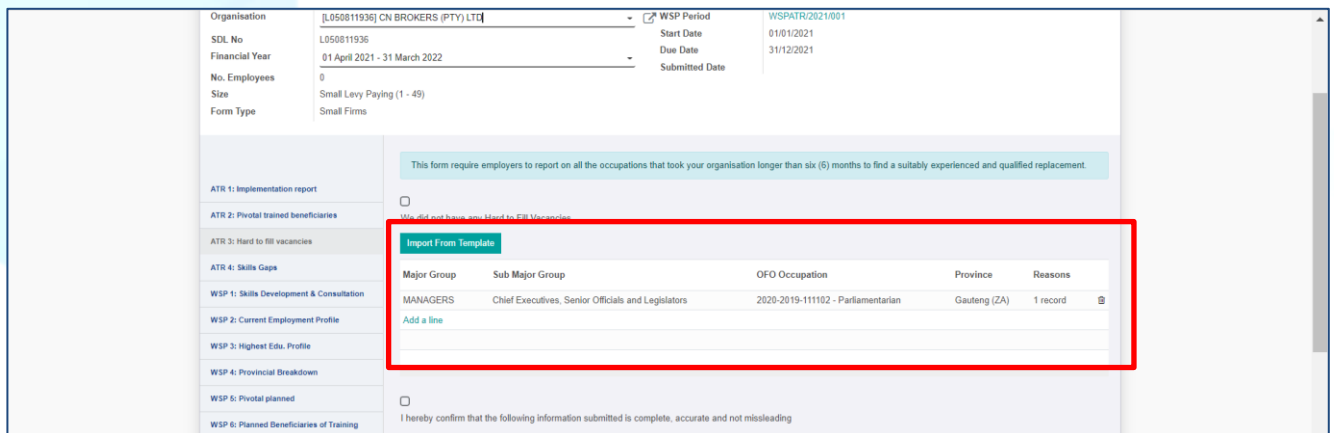


## 7.5 STEP 4- Hard to fill vacancies



- 🖱️ 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



Major Group	Sub Major Group	OFO Occupation	Province	Reasons
MANAGERS	Chief Executives, Senior Officials and Legislators	2020-2019-111102 - Parliamentary	Gauteng (ZA)	1 record

## 7.6 STEP 5- Skills Gap

### Scenario I

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 requires 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

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

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  
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 are 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		

This form requires 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
Add a line					

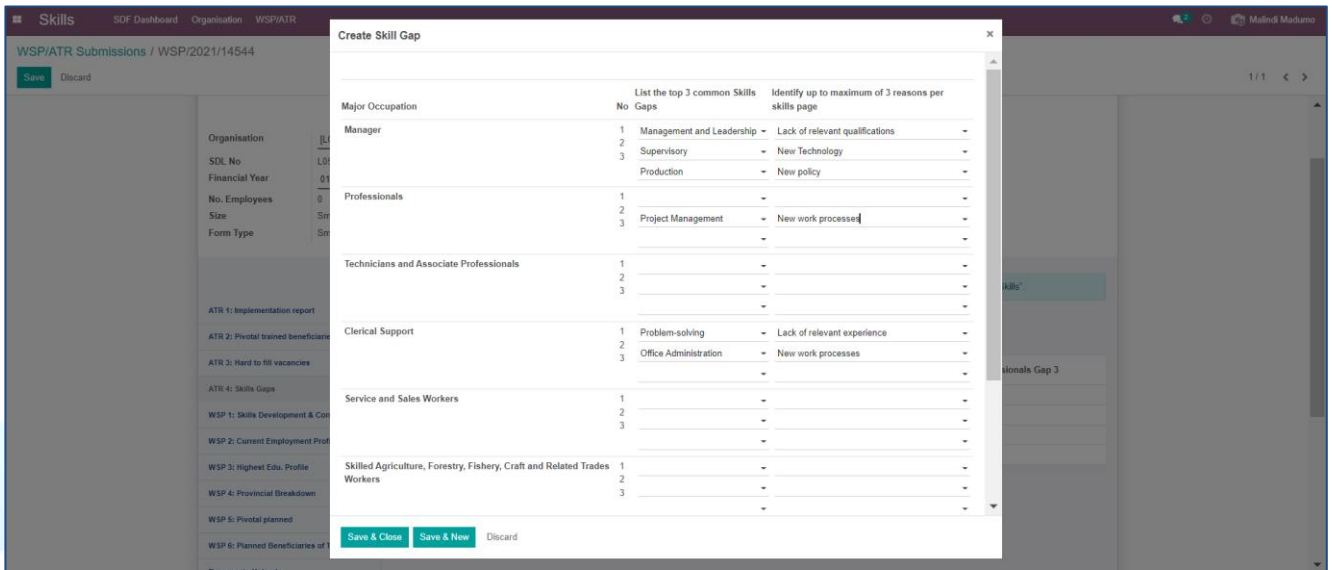
☐ I hereby confirm that the following information submitted is complete, accurate and not misleading

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  
WSP 4: Provincial Breakdown  
WSP 5: Pivotal planned  
WSP 6: Planned Beneficiaries of Training

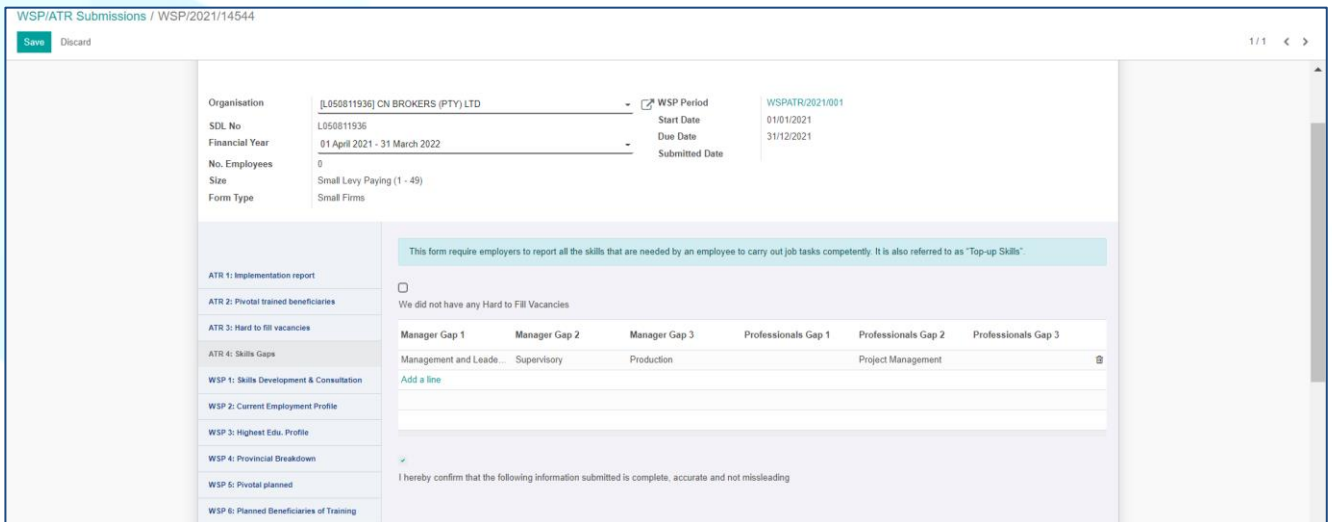
Untick the Checkbox

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



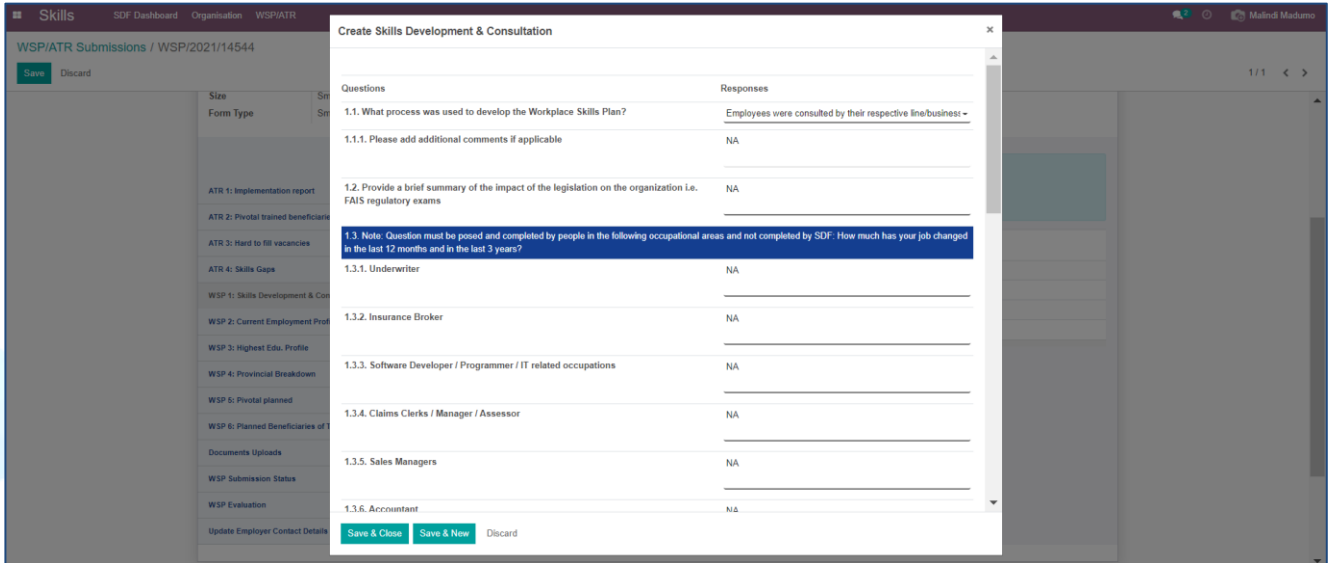
-  Capture Skills Gap
-  Click **Save & Close**

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



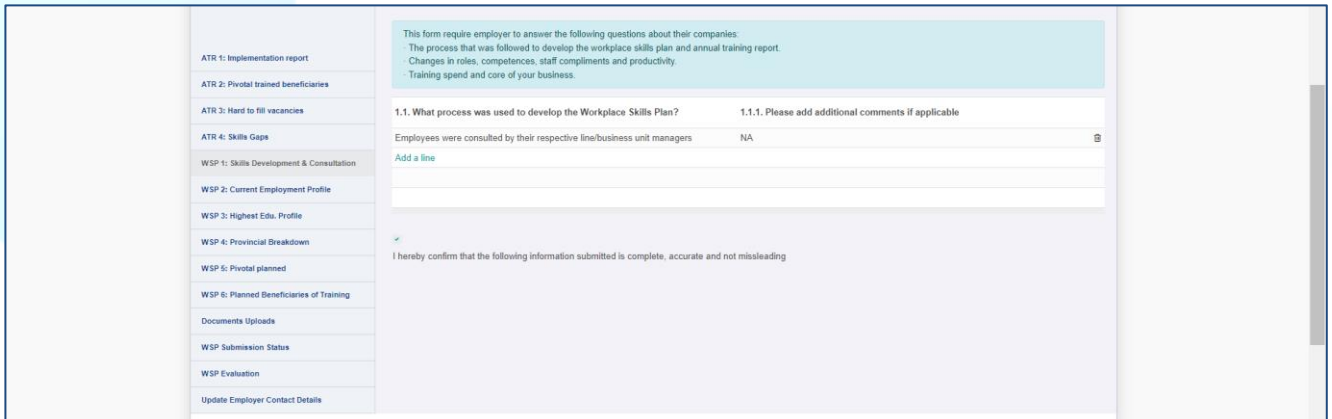


## 7.7 STEP 6- Skills Development & Consultation



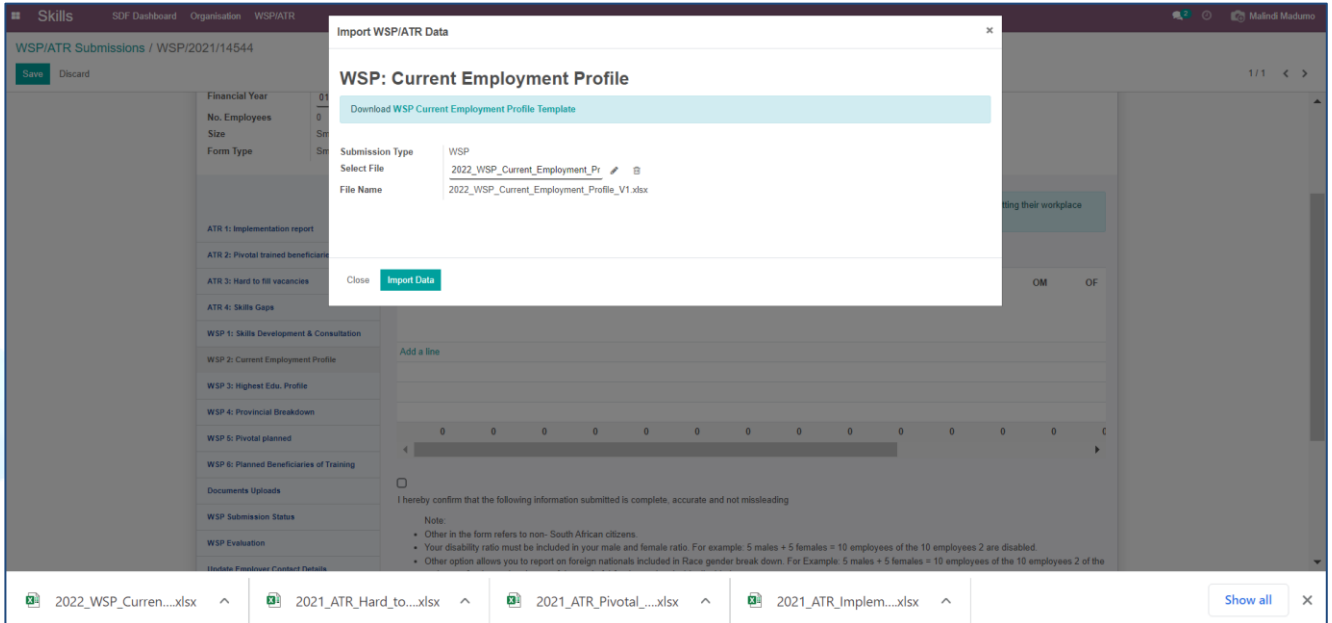
- ☞ Click **Skills Development & Consultation**
- ☞ Click on **Add a line** to edit data
- ☞ Complete form and click **Save & Close**

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



- ☞ Check the declaration tick-box

## 7.8 STEP 7- Current Employment Profile



**Import WSP/ATR Data**

**WSP: Current Employment Profile**

Download WSP Current Employment Profile Template

Submission Type: WSP  
Select File: 2022\_WSP\_Current\_Employment\_Pr  
File Name: 2022\_WSP\_Current\_Employment\_Profile\_V1.xlsx

Close Import Data

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

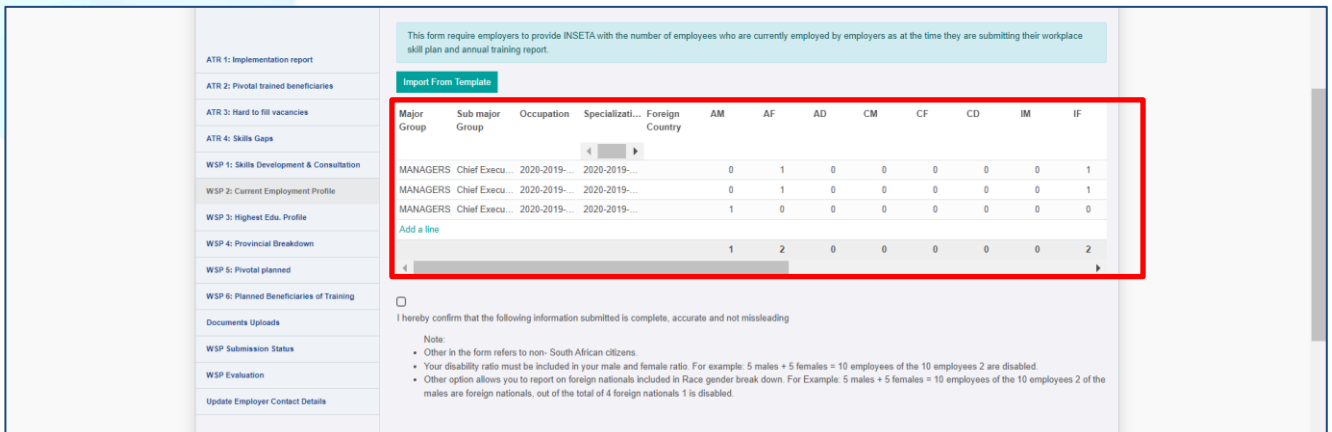
Note:

- 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.

2022\_WSP\_Curren...xlsx 2021\_ATR\_Hard\_to...xlsx 2021\_ATR\_Pivotal...xlsx 2021\_ATR\_Implem...xlsx Show all

- 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



This form requires employers to provide INSETA with the number of employees who are currently employed by employers as at the time they are submitting their workplace skill plan and annual training report.

Import From Template

Major Group	Sub major Group	Occupation	Specializati...	Foreign Country	AM	AF	AD	CM	CF	CD	IM	IF
MANAGERS	Chief Execu...	2020-2019-...	2020-2019-...		0	1	0	0	0	0	0	1
MANAGERS	Chief Execu...	2020-2019-...	2020-2019-...		0	1	0	0	0	0	0	1
MANAGERS	Chief Execu...	2020-2019-...	2020-2019-...		1	0	0	0	0	0	0	0
					1	2	0	0	0	0	0	2

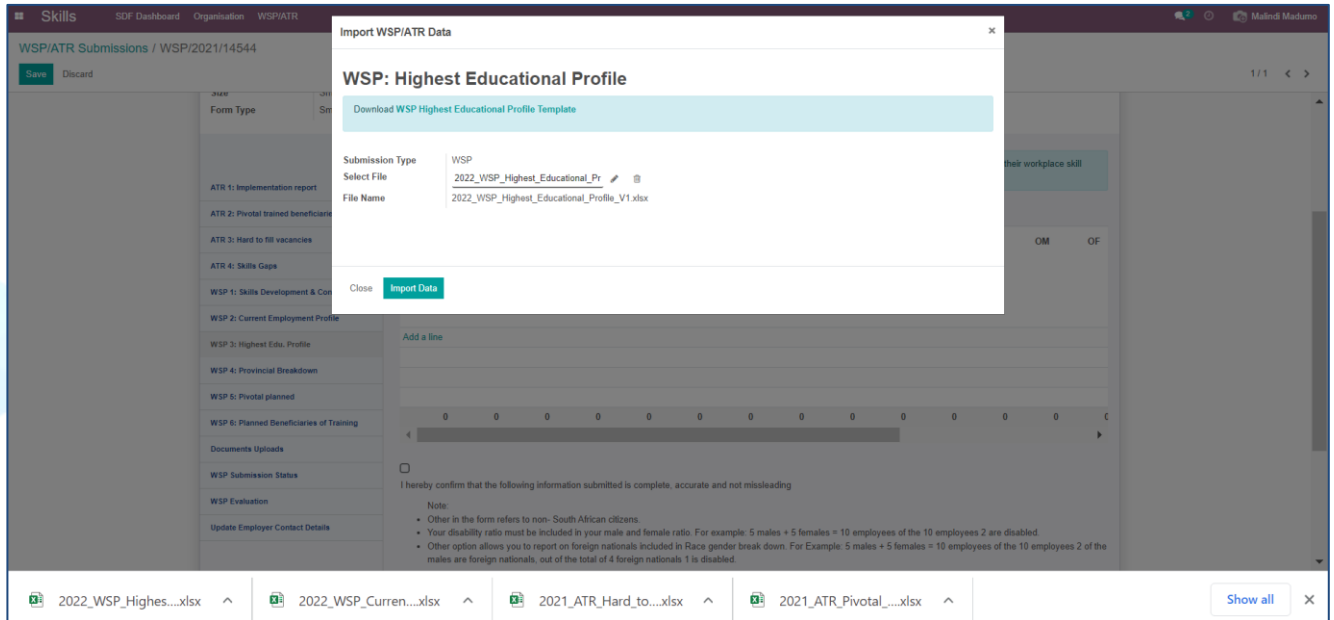
Add a line

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

Note:

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

## 7.9 STEP 8- Highest Educational Profile



The screenshot shows the 'WSP/ATR Submissions / WSP/2021/14544' interface. A pop-up window titled 'Import WSP/ATR Data' is open, displaying the 'WSP: Highest Educational Profile' form. The form includes a 'Download WSP Highest Educational Profile Template' button, a 'Submission Type' dropdown set to 'WSP', and a 'Select File' button. Below these, the 'File Name' is listed as '2022\_WSP\_Highest\_Educational\_Profile\_V1.xlsx'. The 'Import Data' button is highlighted in green. The background shows a sidebar with various submission types and a main area with a table for data entry.

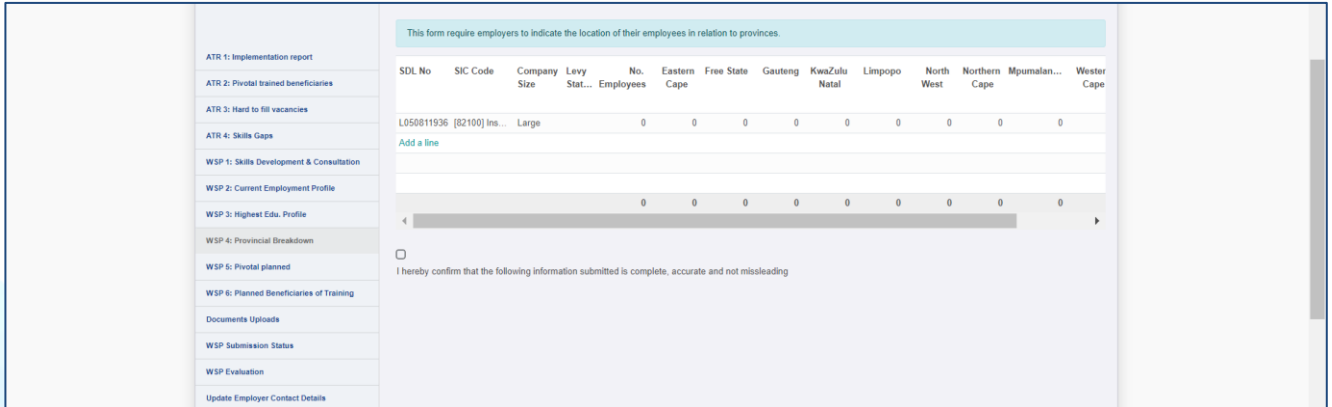
- 🖱️ Click **Highest Educational Profile**
- 🖱️ On the pop-up screen, Click **Download Highest Educational Profile** (As shown in STEP 2)
- 🖱️ The file is downloaded on your machine
- 🖱️ Click on **Upload file** then browse your machine and select the saved file
- 🖱️ Click **Import Data**

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



The screenshot shows the 'WSP: Highest Educational Profile' form with data imported from a template. The form includes a table for data entry with columns for 'NQF Level Of Skill Priority' and various skill levels (AM, AF, AD, CM, CF, CD, IM, IF, ID, WM, WF, WD, OF). The data is populated with values from the template, and the 'Import From Template' button is highlighted in red. The background shows the same sidebar and main area as the previous screenshot.

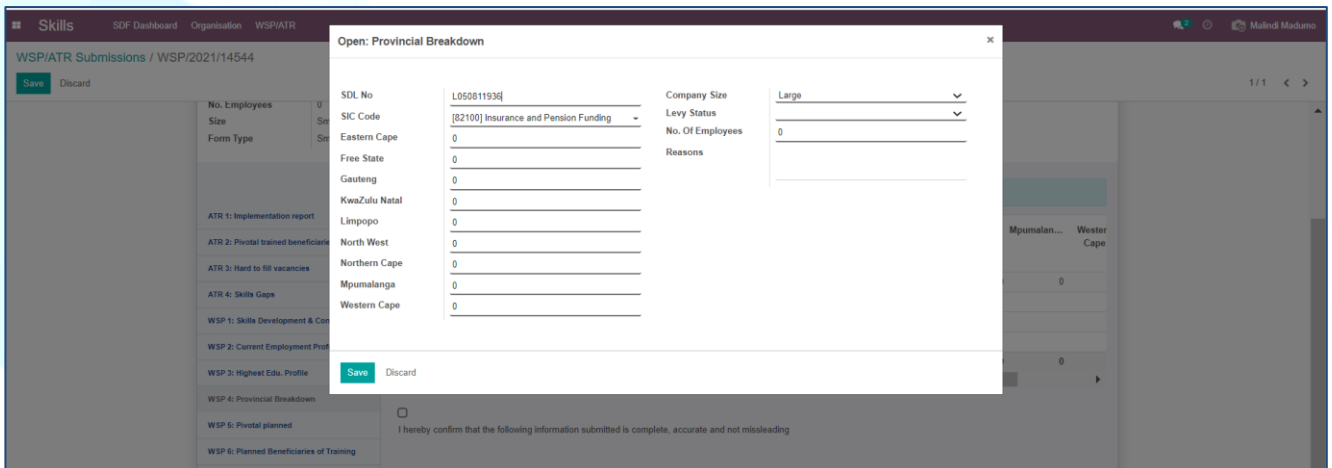
## 7.10 STEP 9- Provincial Background



Click **Provincial Background**

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

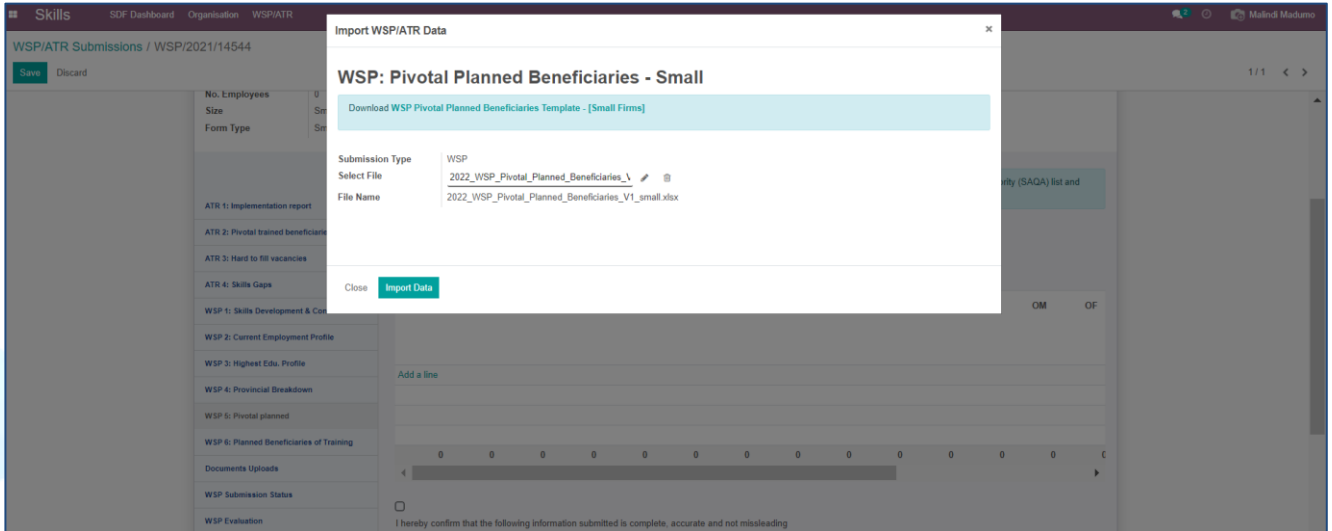
To validate the information,



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

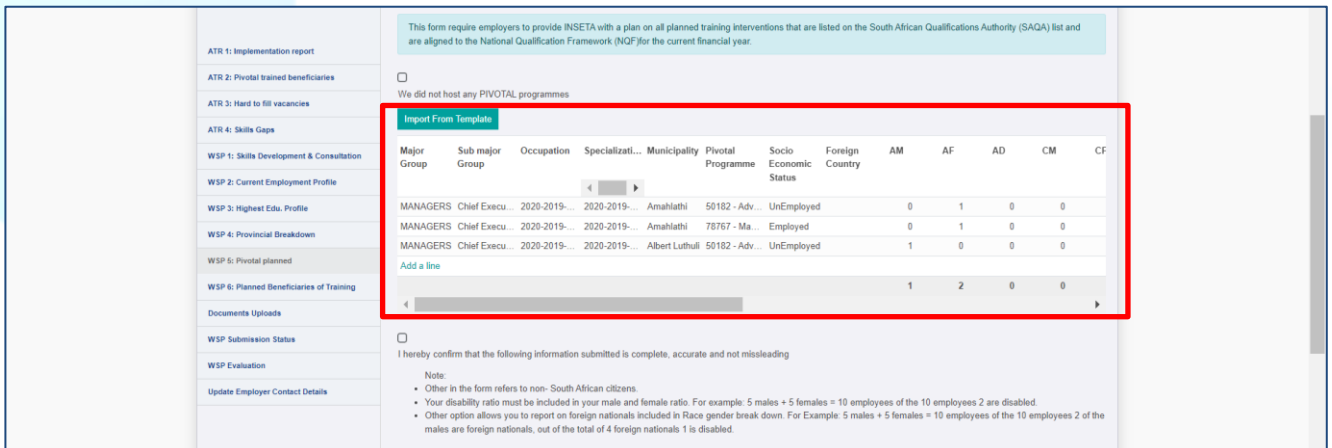
Validate the data and then Click Save

## 7.11 STEP 10- Pivotal Planned



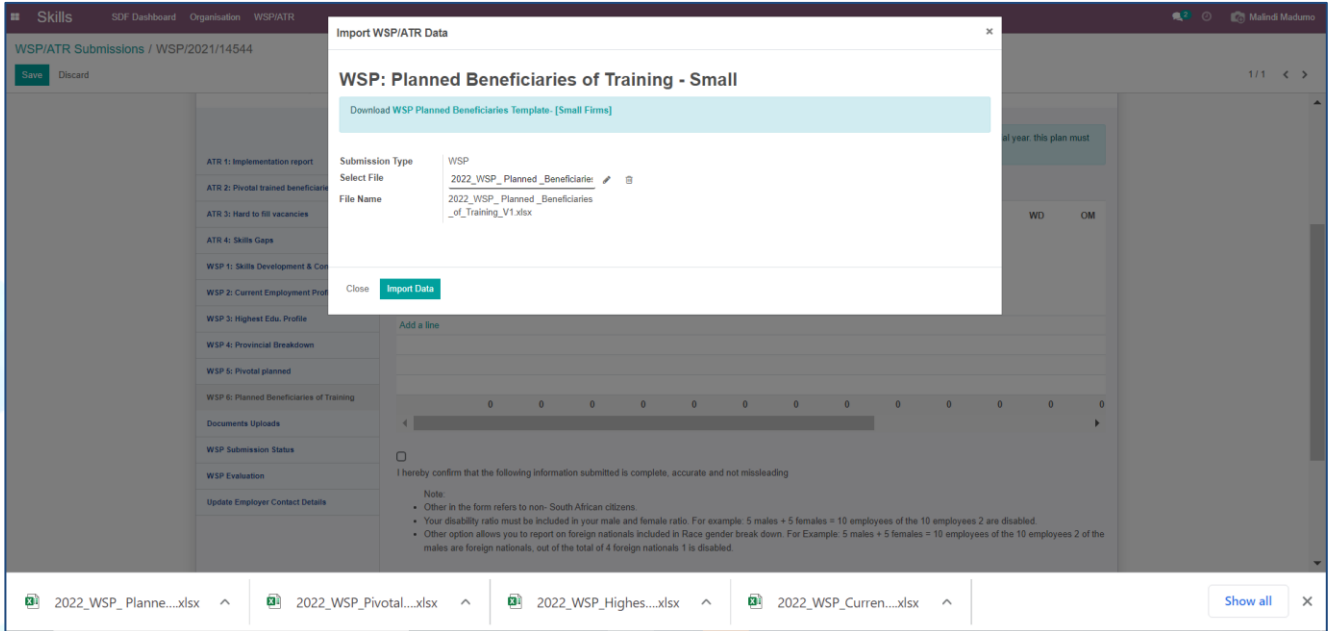
- ☞ Click **Pivotal Planned**
- ☞ On the pop-up screen, Click Download **Pivotal Planned** (As shown in STEP 2)
- ☞ The file is downloaded on your machine
- ☞ Click on **Upload file** then browse your machine and select the saved file
- ☞ Click **Import Data**

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



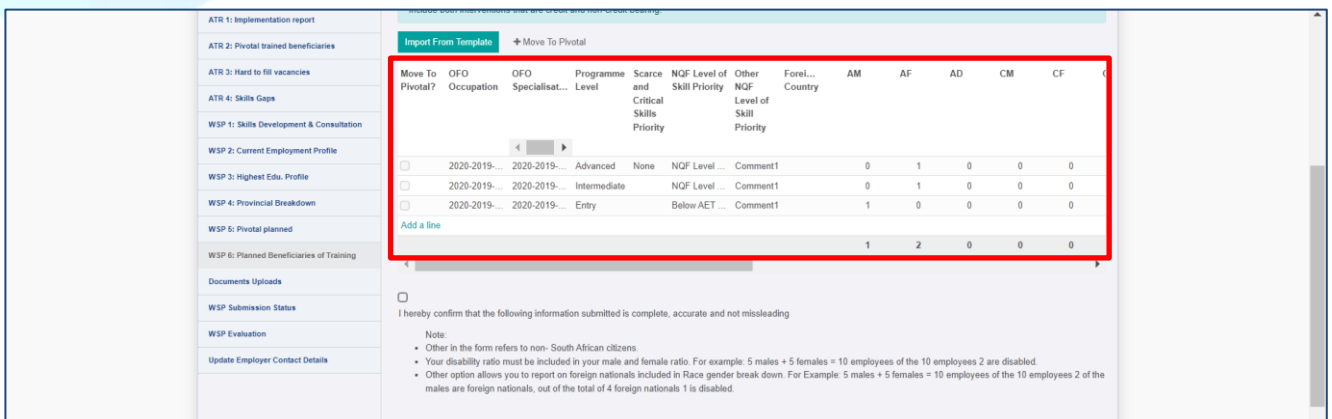
Major Group	Sub major Group	Occupation	Specializati...	Municipality	Pivotal Programme	Socio Economic Status	Foreign Country	AM	AF	AD	CM	CF
MANAGERS	Chief Execu...	2020-2019-...	2020-2019-...	Amahlathi	50182 - Adv...	UnEmployed		0	1	0	0	
MANAGERS	Chief Execu...	2020-2019-...	2020-2019-...	Amahlathi	78767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

## 7.12 STEP 11- Planned Beneficiaries of Training



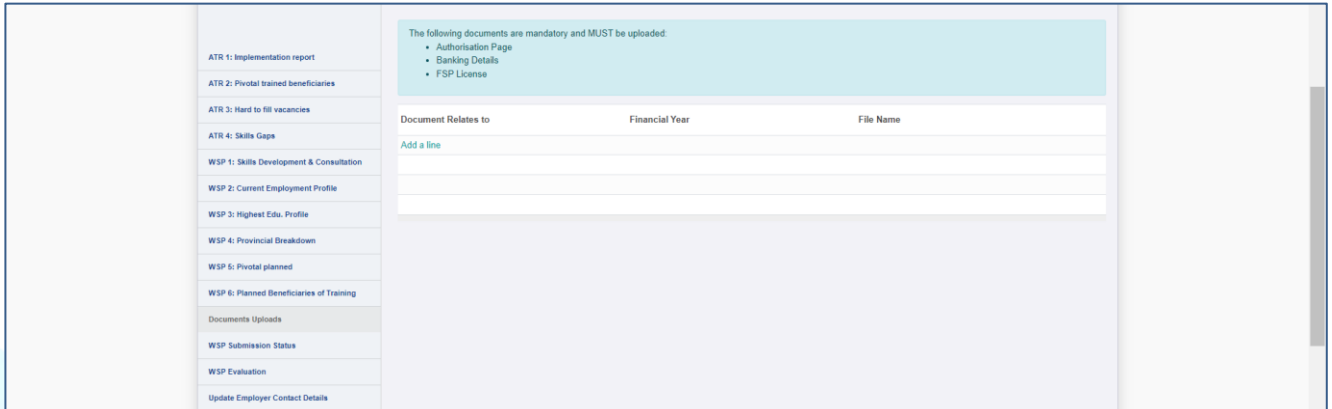
- 🖱️ Click **Planned Beneficiaries of Training**
- 🖱️ On the pop-up screen, Click **Download Planned Beneficiaries of Training** (As shown in STEP 2)
- 🖱️ The file is downloaded on your machine
- 🖱️ Click on **Upload file** then browse your machine and select the saved file
- 🖱️ Click **Import Data**

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



Move To Pivotal?	OFO Occupation	OFO Specialisation	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

## 7.13 STEP 12- Documents Upload

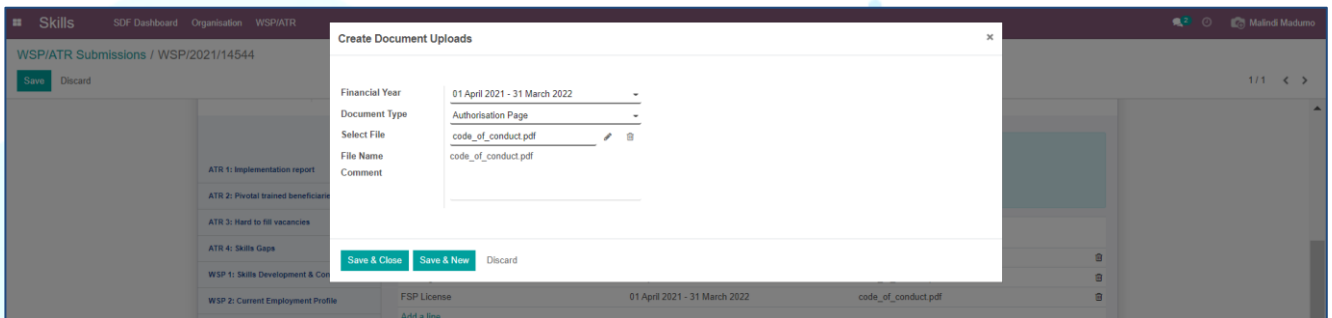


The following documents are mandatory and MUST be uploaded:

- Authorisation Page
- Banking Details
- FSP Licence

Document Relates to	Financial Year	File Name
<a href="#">Add a line</a>		

Click **Documents Upload**



**Create Document Uploads**

Financial Year: 01 April 2021 - 31 March 2022

Document Type: Authorisation Page

Select File: code\_of\_conduct.pdf

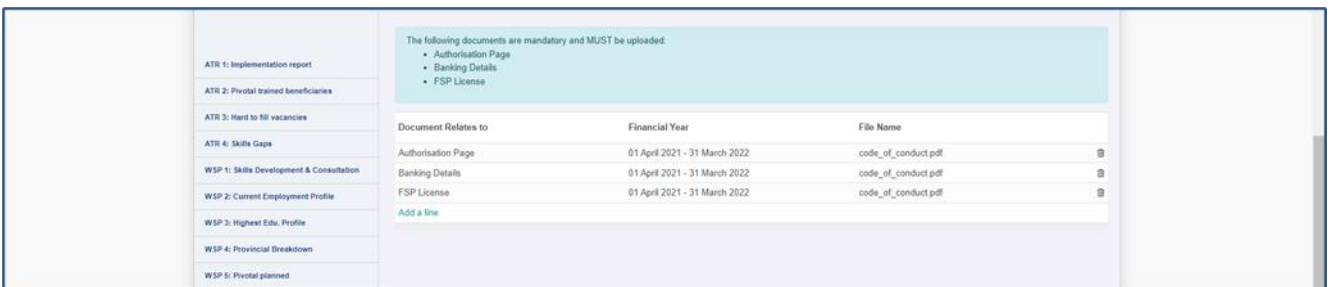
File Name: code\_of\_conduct.pdf

Comment:

[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 Licence

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 Licence	01 April 2021 - 31 March 2022	code_of_conduct.pdf
<a href="#">Add a line</a>		

## 7.14 STEP 13- Download Authorisation Page

WSP/ATR Submissions												
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/2021/146...	[N00007710] Nali Test Org 2	N00007710	Small Firms	01 April 2022 - 31 March 2023	WSP/ATR/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	WSP/ATR/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	WSP/ATR/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] INSETATest	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

Draft Pending Validation Pending Assessment Pending Evaluation Approved Rejected

**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 WSP/ATR/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

Draft Pending Validation Pending Assessment Pending Evaluation Approved Rejected

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

Due Date 01/31/2022

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

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

N000000015\_WSP...pdf

Show all

The Authorisation page is downloaded on the local machine

Double click on document to open



1 / 2 | 60%

N000000015\_WSP\_2021\_14692\_authorizationpage.pdf

**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 COMPIATION OF THE SECTOR SKILLS PLAN.

## 7.15 STEP 14- WSP Submission

Skills SDF Dashboard Organisation WSP/ATR

WSP/ATR Submissions / WSP/2021/14544

Save Discard

Submit

1 / 1

Draft Pending Validation Pending Assessment Pending Evaluation Approved Rejected

**WSP/2021/14544**

Organisation	[L050811936] CN BROKERS (PTY) LTD	WSP Period	WSP/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		

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

**Confirmation**

Are you sure you want to submit this WSP?

Ok Cancel

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

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

Validation Error

Please fix the following issues:

- A minimum of two contacts are required for WSP Submission. Please update organisation "CN BROKERS (PTY) LTD" profile and provide at least 2 contact persons.
- Please provide 'Other NQF Level of Skill Priority' for Local Authority Manager in Implementation Report
- Total sum of employees in Current Employment Profile Report Must equal Number of Employees (Current FY) recorded in Organisation Details 'CN BROKERS (PTY) LTD'

Number of Employees (Current FY) = 0  
No of Employees (Employment Profile) = 5

- Total sum of employees in Highest Educational Profile Report Must equal Number of Employees (Current FY) recorded in Organisation Details for 'CN BROKERS (PTY) LTD'

Number of Employees (Current FY) = 0  
No of Employees (Highest Edu. Profile) = 5

Ok

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

WSP/ATR Submissions / WSP/2021/14544

Edit

Print Action

1 / 1

Draft

Pending Validation

Pending Assessment

Pending Evaluation

Approved

Rejected

WSP/2021/14544

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	5	Submitted Date	07/12/2021 02:00:00
Size	Small Levy Paying (1 - 49)		
Form Type	Small Firms		

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**