



MIS IMPLEMENTATION

ETQA MODULE TRAINING GUIDE


External

Version 1.1

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
Stanley Matende	ETQA Manager		
Malindi Madumo	Change Manager		14/06/2022

Version Control

Date	Version	Summary of changes	Amended by
06 January 2021	1.0	Draft	Malindi Madumo
23 March 2023	1.1	Added Programme Assessment and Report Builder	Malindi Madumo

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2 Introduction

This is a Training manual for the new MIS System for the Insurance Sector Education and Training Authority (INSETA). The system provides the organisation with an easy and timeous process for the ETQA key functionalities.

2.1 Objective

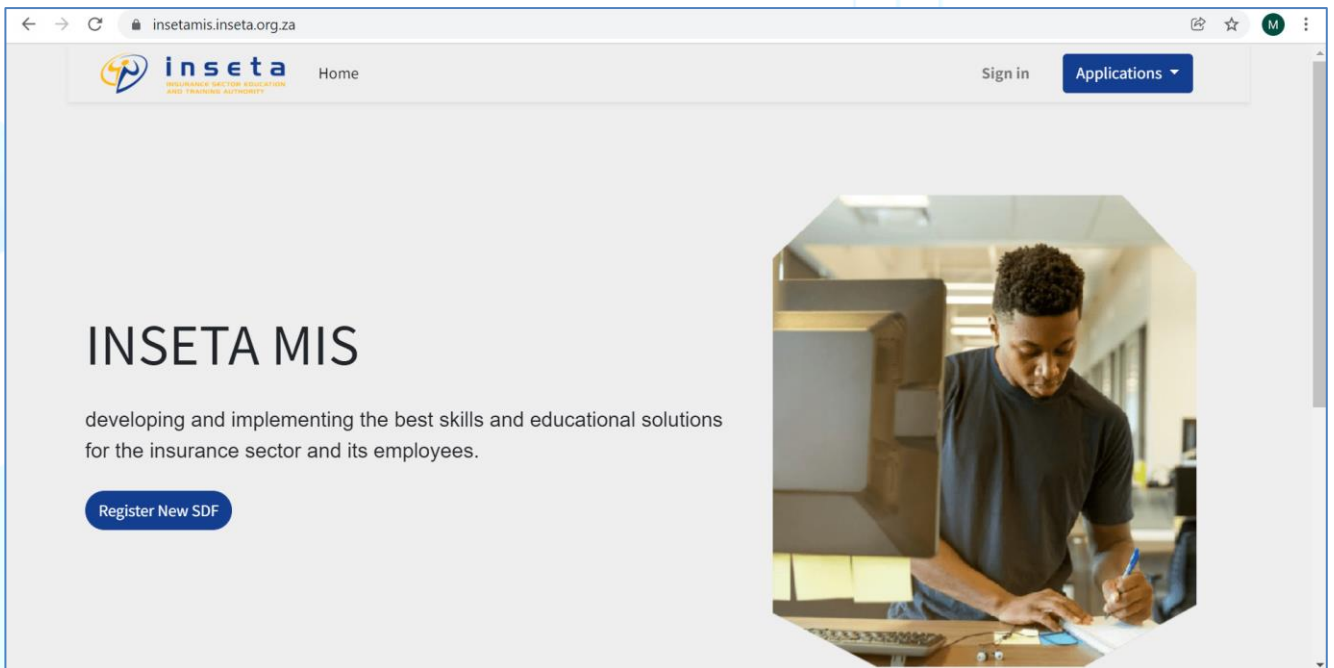
The objective of this training manual is to provide a step-by-step guide on how to execute the following processes on the system:

- Register an Assessor
- Register a Moderator
- Provider accreditation
- Register learners
- Add Assessments and update progress
- Link Assessors and Moderators to a Service Provider
- Link Learners to a Service Provider and qualification
- Link Assessors and Moderators to a qualification

3 Navigation



3.1 System Access

To access the MIS ETQA 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

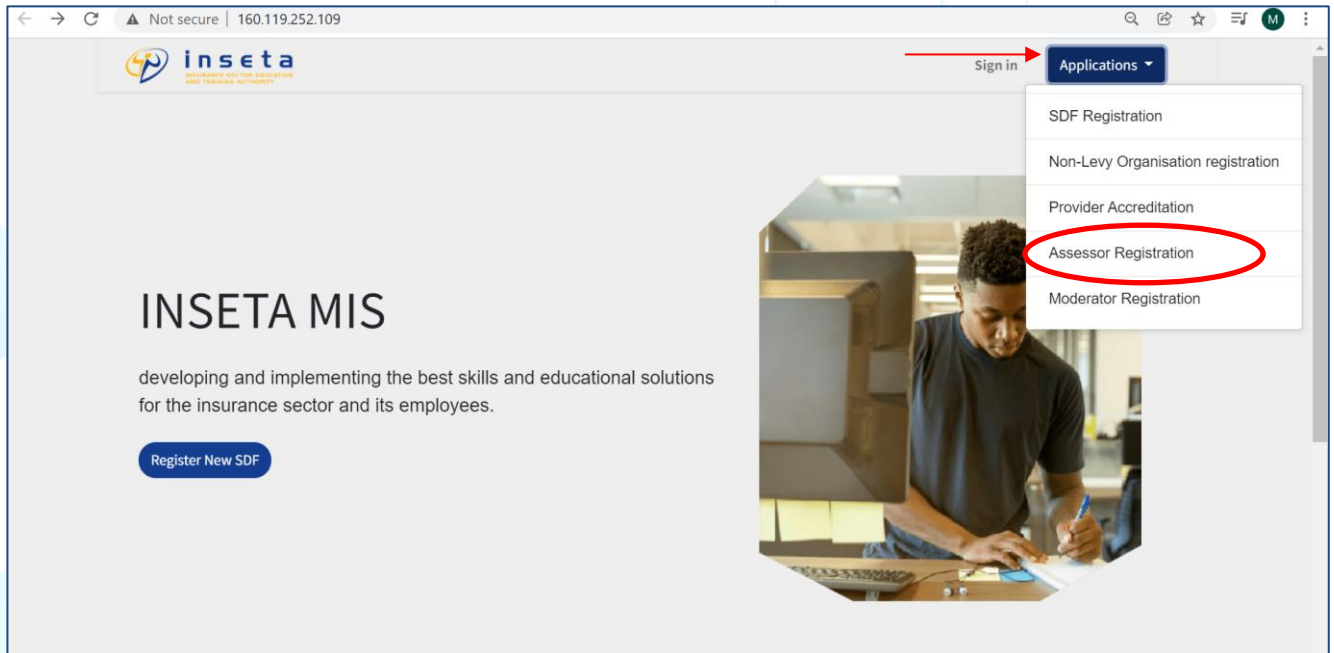
The following table includes abbreviations or notations that are used in the document and on the system.

Term/Acronym	Definition
ETQA	Education Training and Quality Assurance

4 Assessor Registration

This section provides a guide on how to register as an assessor on the MIS system.

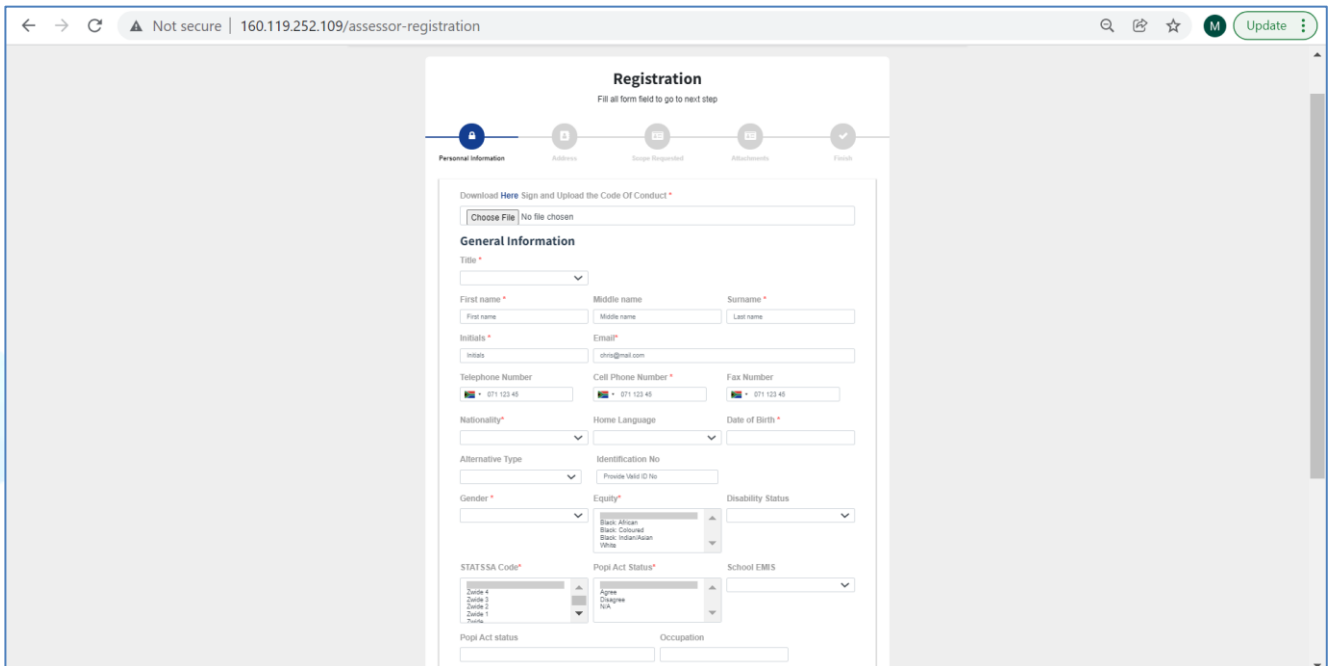
4.1 STEP I- Assessor Registration



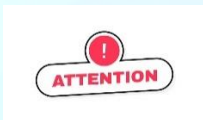
- 🖱️ On the INSETA MIS landing page, Click on **Applications** to expand dropdown menu
- 🖱️ Then, click on **Assessor Registration**

The Assessor Registration form is displayed

4.2 STEP 2- Capture Personal Information

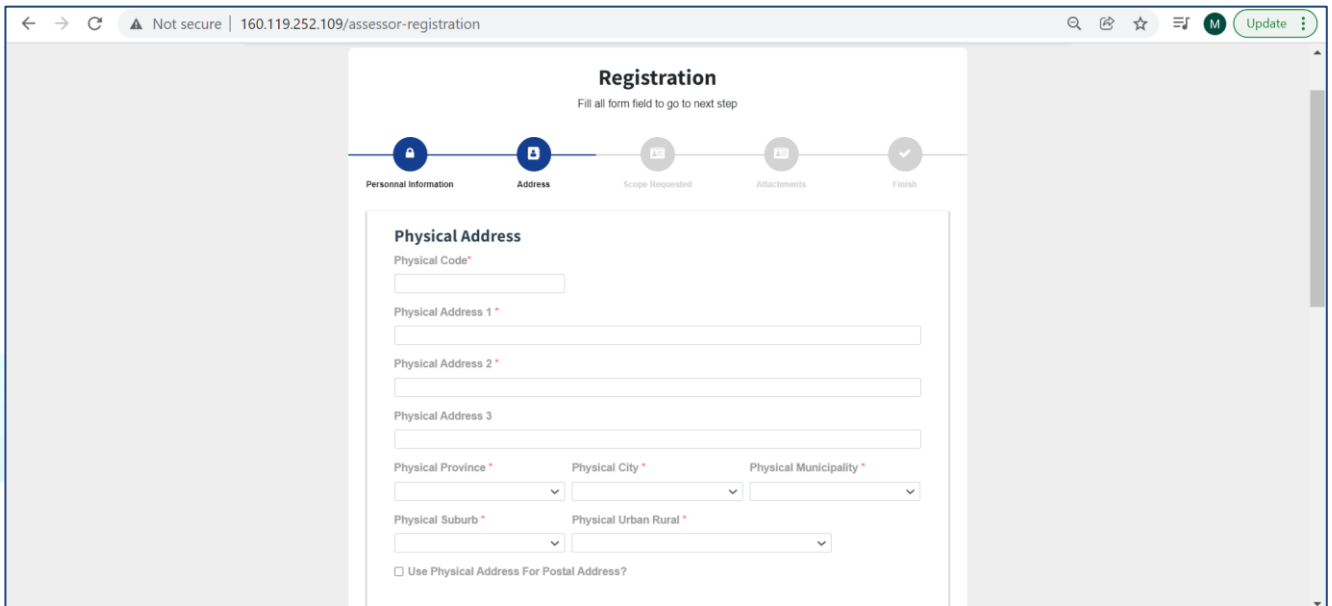


-  Download, Sign and Upload the Code of Conduct
-  Capture General Information
-  Then, click **Next Step**



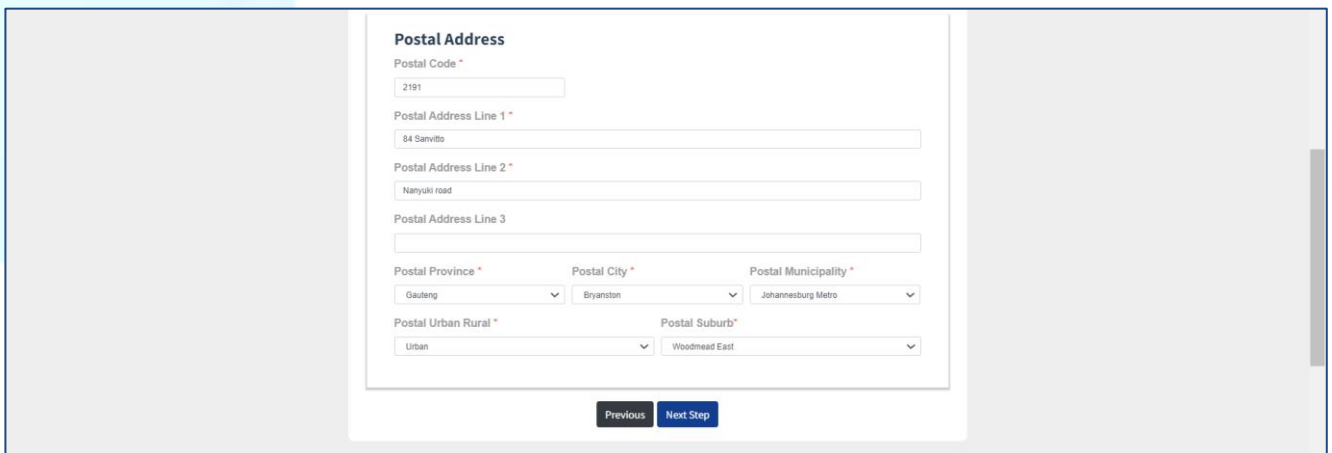
Please note that the fields marked with an asterisk (*) are mandatory and should be completed

4.3 STEP 3- Complete Physical Address



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

4.4 STEP 4- Complete Postal Address



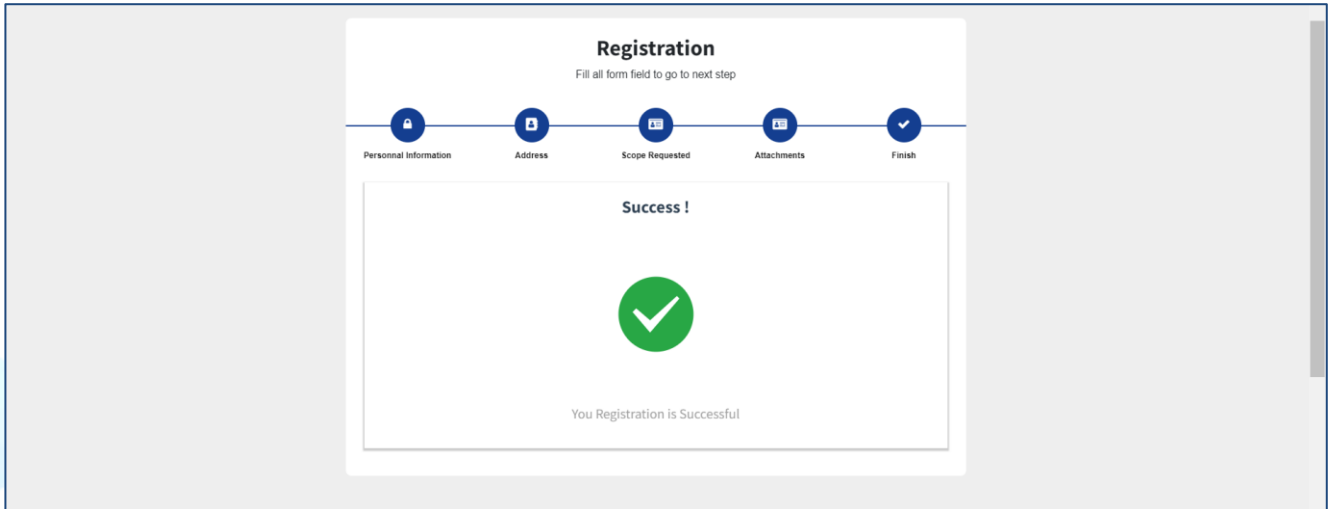
- 📝 Capture Postal Address details and then click **Next Step**

4.5 STEP 5- Capture Scope Requested

- Search Unit standard by SAQA CODE and select
- Search Qualifications by SAQA CODE and select
- Click **Next Step**

4.6 STEP 6- Upload Attachments

- Upload all required documents
- Check the declaration tick-box, and click **Confirm**

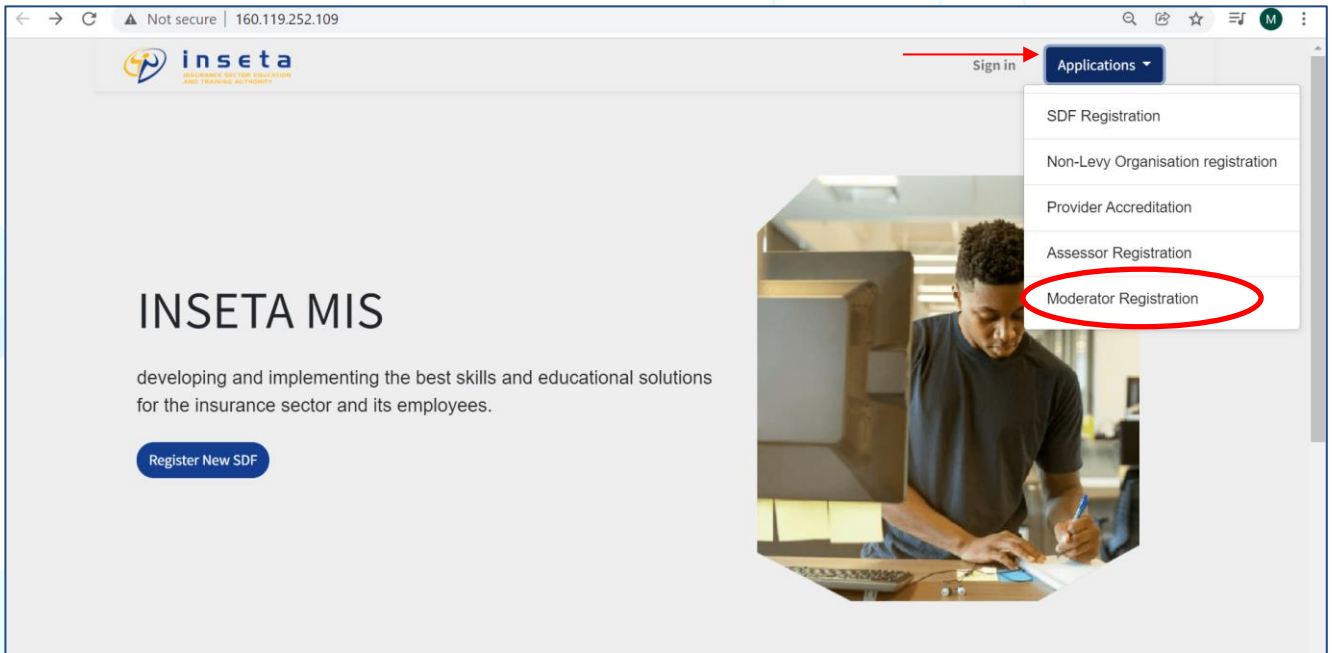


You have successfully registered as an Assessor the system. An email will then be sent to the INSETA ETQA team for approval

5 Moderator Registration

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

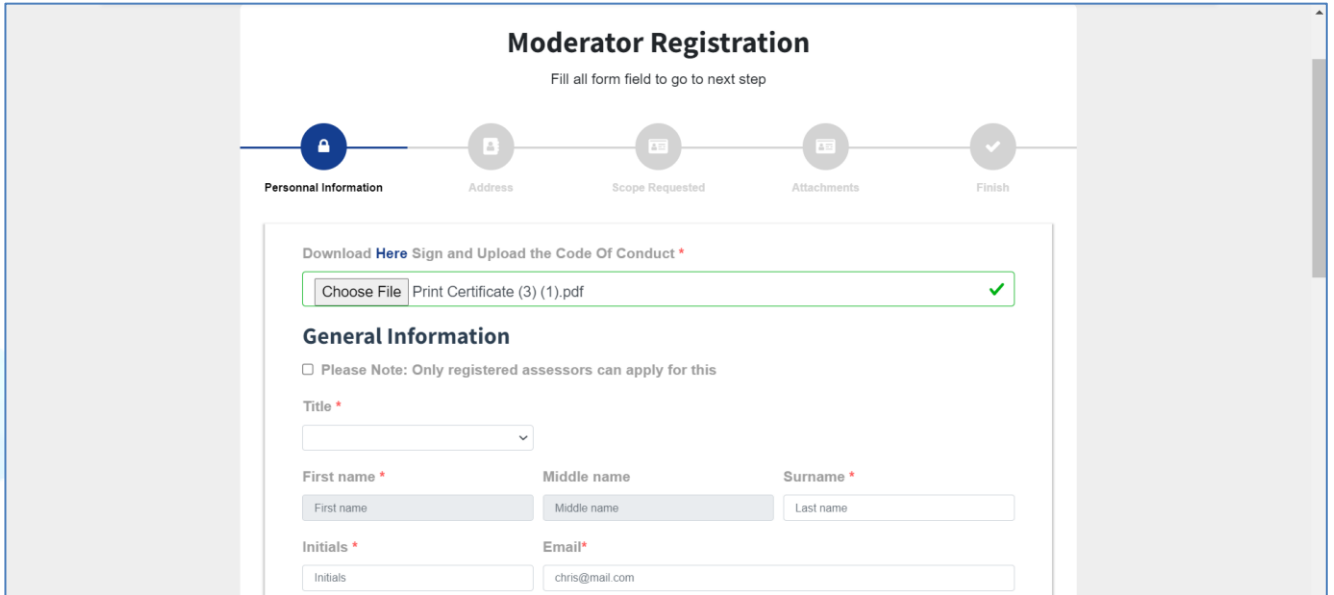
5.1 STEP I- Moderator Registration



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

The Moderator Registration form is displayed

5.2 STEP 2- Capture Personal Information



Moderator Registration
Fill all form field to go to next step

Personal Information
Address
Scope Requested
Attachments
Finish

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

Choose File Print Certificate (3) (1).pdf ✓

General Information

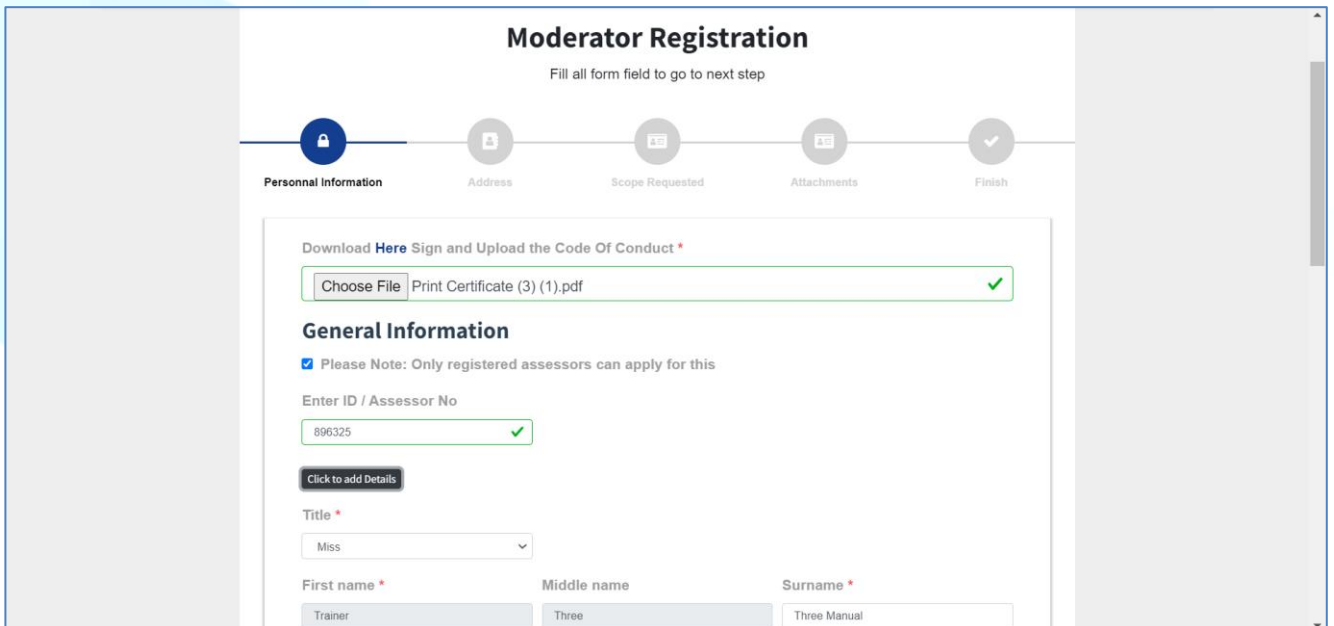
Please Note: Only registered assessors can apply for this

Title *

First name * Middle name Surname *

Initials * Email*

- 🔒 Download, Sign and Upload the Code of Conduct
- 🔒 Check the “Only registered assessors can apply for this” tick-box



Moderator Registration
Fill all form field to go to next step

Personal Information
Address
Scope Requested
Attachments
Finish

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

Choose File Print Certificate (3) (1).pdf ✓

General Information

Please Note: Only registered assessors can apply for this

Enter ID / Assessor No

896325 ✓

[Click to add Details](#)

Title *

First name * Middle name Surname *

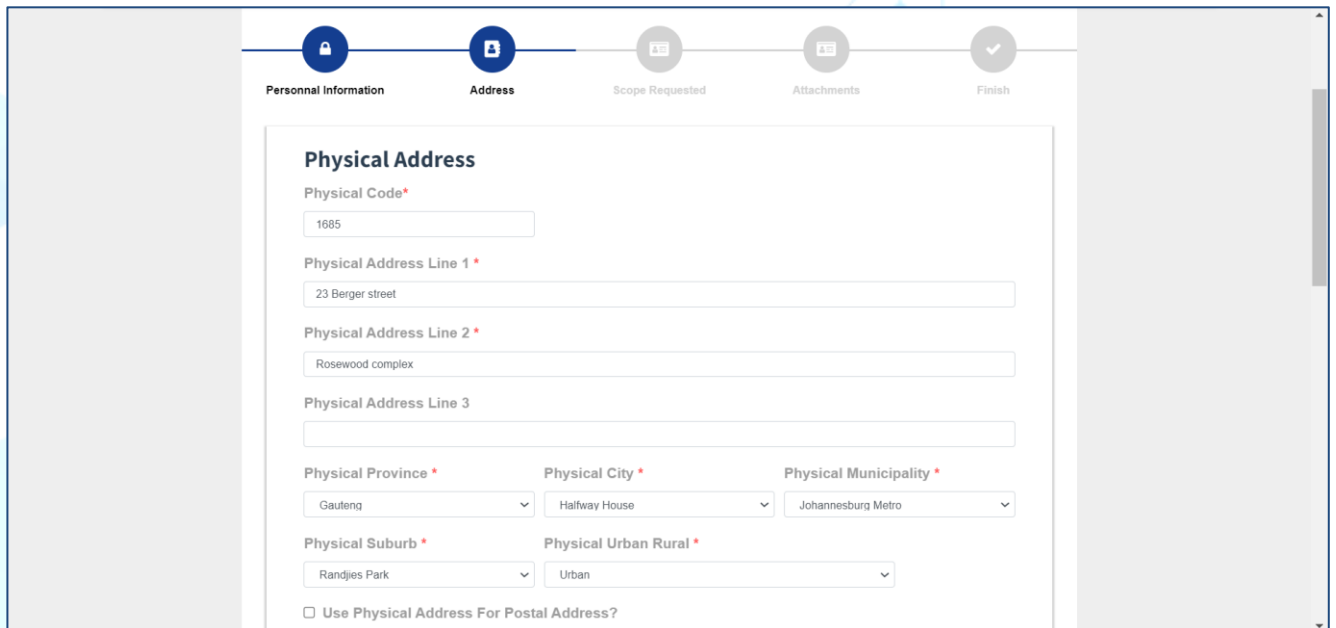
- 🔒 Enter ID/ Assessor No.
- 🔒 **Click to add details** button
- 🔒 Confirm Personal Information
- 🔒 Then, click **Next Step**



Please note that only registered assessors can apply as moderator



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

5.3 STEP 3- Confirm Address Information



The screenshot shows a web form for confirming address information. At the top, there is a progress bar with five steps: Personal Information, Address (current step), Scope Requested, Attachments, and Finish. The 'Physical Address' section contains the following fields:

- Physical Code* (text input): 1685
- Physical Address Line 1* (text input): 23 Berger street
- Physical Address Line 2* (text input): Rosewood complex
- Physical Address Line 3 (text input): [empty]
- Physical Province* (dropdown): Gauteng
- Physical City* (dropdown): Halfway House
- Physical Municipality* (dropdown): Johannesburg Metro
- Physical Suburb* (dropdown): Randjes Park
- Physical Urban Rural* (dropdown): Urban
- Use Physical Address For Postal Address? (checkbox): [unchecked]

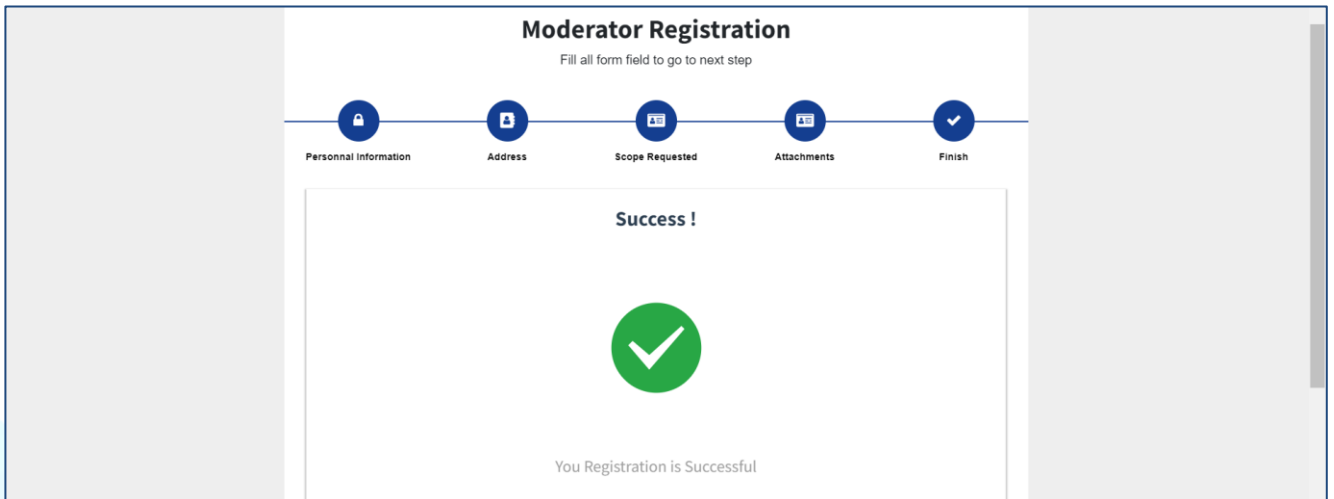
-  Check and confirm Physical and Postal Address details
-  Click **Next Step**

5.4 STEP 4- View Scope Requested

- View Scope requested
- Click **Next Step**

5.5 STEP 5- Upload Attachments

- Upload all required documents
- Check the declaration tick-box, and click **Confirm**

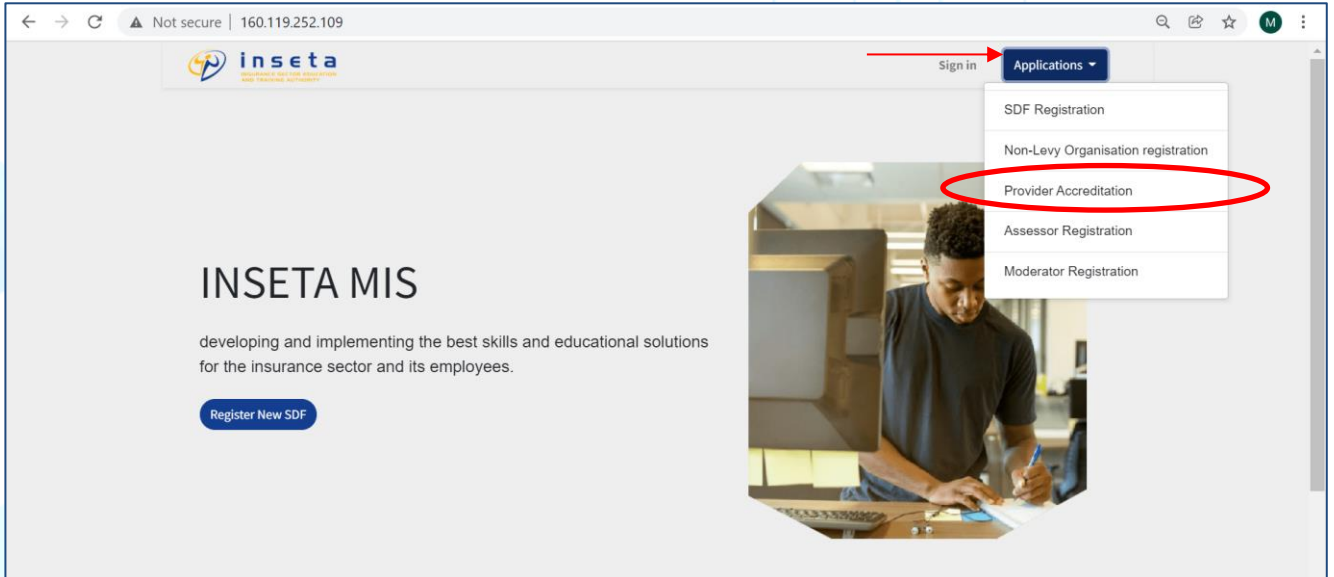


You have successfully registered as a Moderator on the system. An email notification will be sent to the INSETA ETQA team for approval.

6 Provider Accreditation

6.1 STEP 1- Provider Accreditation

This section provides steps for provider accreditation on the MIS system.



- 🔗 On the INSETA MIS landing page, Click on **Applications** to expand dropdown menu
- 🔗 Then, click on **Provider Accreditation**



The Provider accreditation form is displayed

6.2 STEP 2- Capture General Information

Provider Accreditation

Fill all form field to go to next step

Information

Address

Campus Info.

Scope

FIA/IS

Attachments

Finish

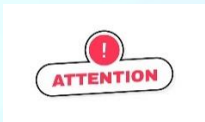
General Information

Tick if applying as Secondary Provider ?

Provider Name * <input style="width: 90%;" type="text" value="MBG"/>	Registered Company Name * <input style="width: 90%;" type="text" value="Qi Solutions"/>	Company Reg. Number * <input style="width: 90%;" type="text" value="Qi Solutions"/>
Income Tax No <input type="text"/>	Email * <input type="text" value="malindi@qisolutions.co.za"/>	SDL Number * <input type="text" value="L430799827"/>
Primary Focus * <input type="text" value="Health Care Benefits Administrat"/>	BBBEEE Status* <input type="text" value="Level one contributor"/>	Current business Year : * <input type="text" value="6"/>
No. of full-time staff * <input type="text" value="10"/>	Provider Accreditation Type * <input type="text" value="Assessment"/>	Provider Class * <input type="text" value="Private"/>
Provider Category * <input type="text" value="Training Provider - Full Qualificat"/>	Training Material * <input type="text" value="OWN MATERIAL"/>	

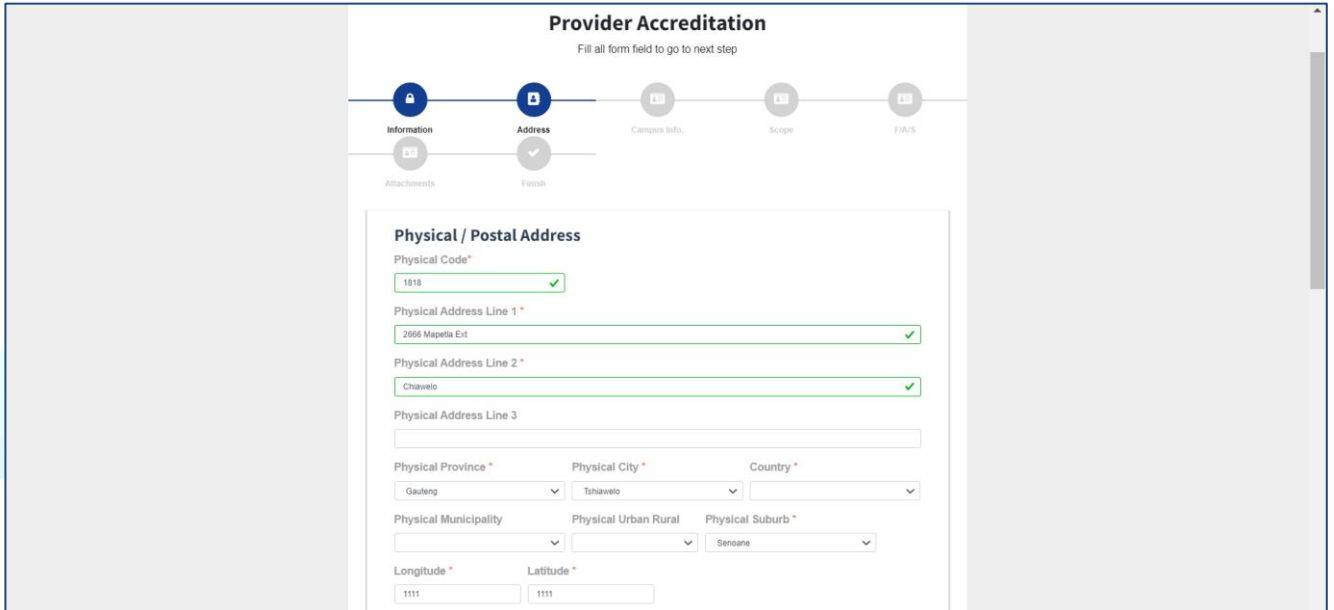
[Next Step](#)

- Capture General Information
- Then, click **Next Step**



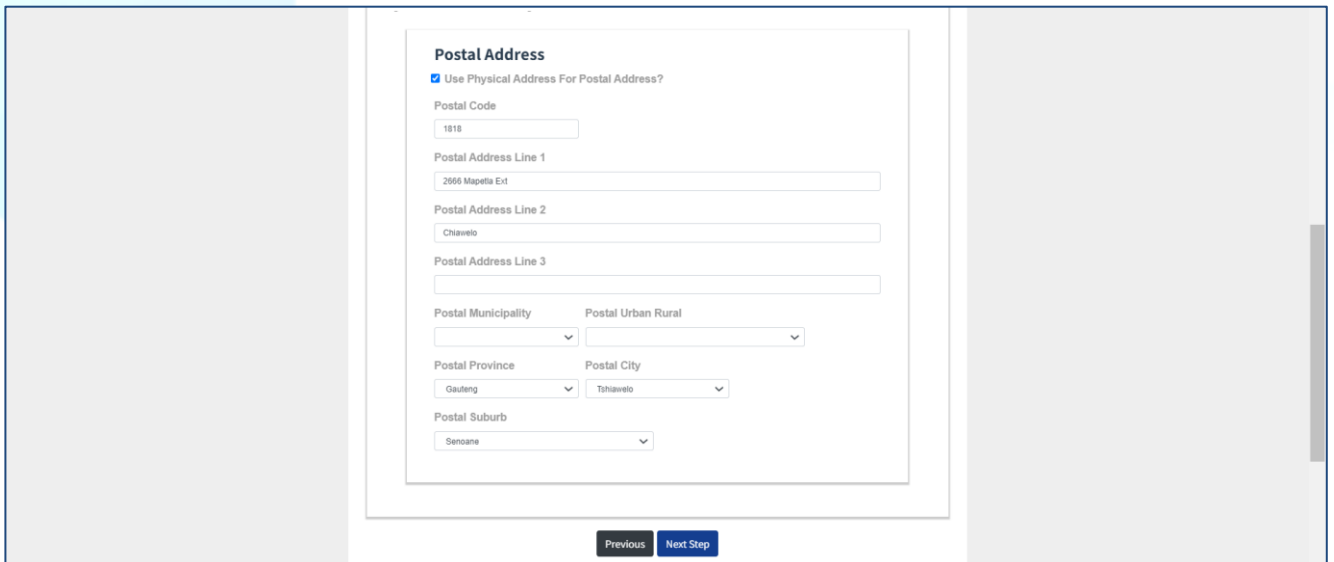
Please note that the fields marked with an asterisk (*) are mandatory and should be completed

6.3 STEP 3- Complete Physical Address



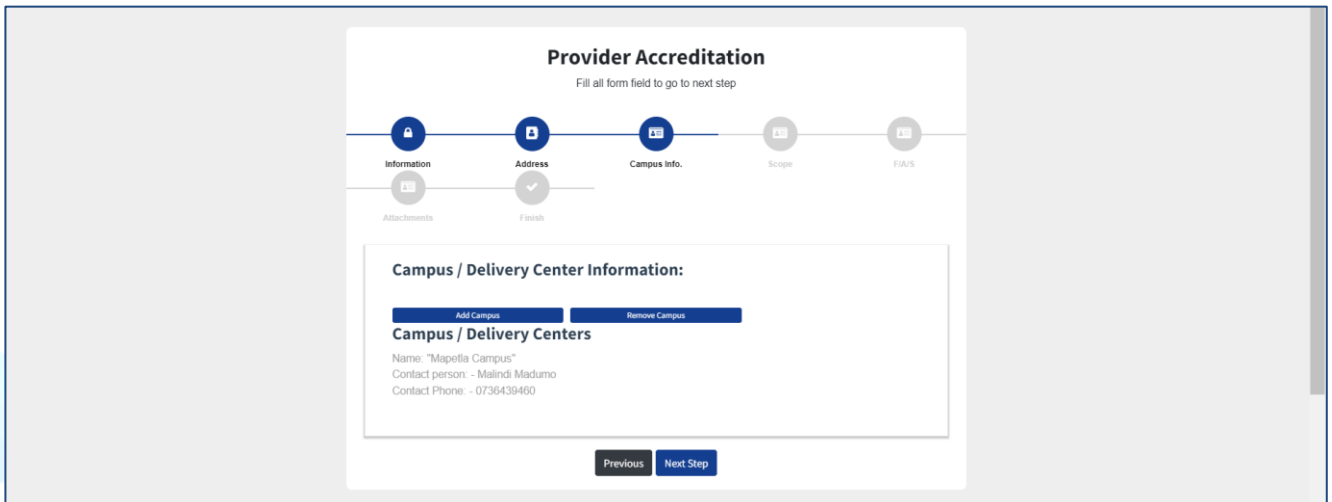
-  Capture Physical Address details
-  Click on the **Use Physical Address for Postal Address** check box if applicable for the next step

6.4 STEP 4- Complete Postal Address



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

6.5 STEP 5- Capture Campus Info



Provider Accreditation
Fill all form field to go to next step

Information Address Campus Info. Scope FIAS

Attachments Finish

Campus / Delivery Center Information:

Add Campus Remove Campus

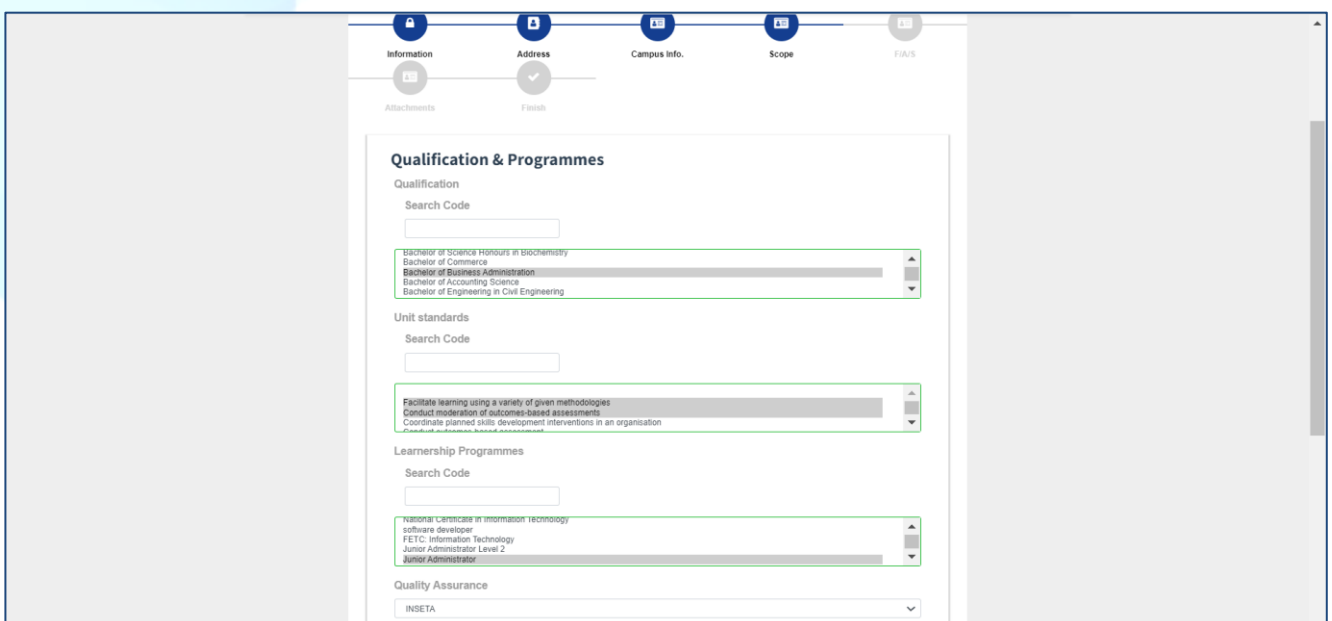
Campus / Delivery Centers

Name: "Mapeta Campus"
Contact person: - Malindi Madumo
Contact Phone: - 0736439460

Previous Next Step

- 🔗 Click **Add Campus** and capture details, then click **Confirm**. You are able to add more than one campus
- 🔗 Click **Next Step**

6.6 STEP 6- Select Scope



Information Address Campus Info. Scope FIAS

Attachments Finish

Qualification & Programmes

Qualification

Search Code

Bachelor of Science Honours in Biochemistry
Bachelor of Commerce
Bachelor of Business Administration
Bachelor of Accounting Science
Bachelor of Engineering in Civil Engineering

Unit standards

Search Code

Facilitate learning using a variety of given methodologies
Conduct moderation of outcomes-based assessments
Coordinate planned skills development interventions in an organisation

Learnership Programmes

Search Code

National Certificate in Information Technology
Software Developer
FETC: Information Technology
Junior Administrator Level 2
Junior Administrator

Quality Assurance

INSETA

- 🔗 Capture Qualification and Programmes
- 🔗 Select Quality Assurance SETA
- 🔗 Click **Next Step**

6.7 STEP 7- Link Facilitators, Assessors & Moderators

Facilitators, Assessors & Moderators

Facilitators

Search ID

AS90000004 - Training Test

Choose File code_of_conduct.pdf

Assessors

Search ID

AS90000004 - Training Test

Choose File code_of_conduct.pdf

Moderators

Search ID

Thomas Chinzulunga

Choose File No file chosen

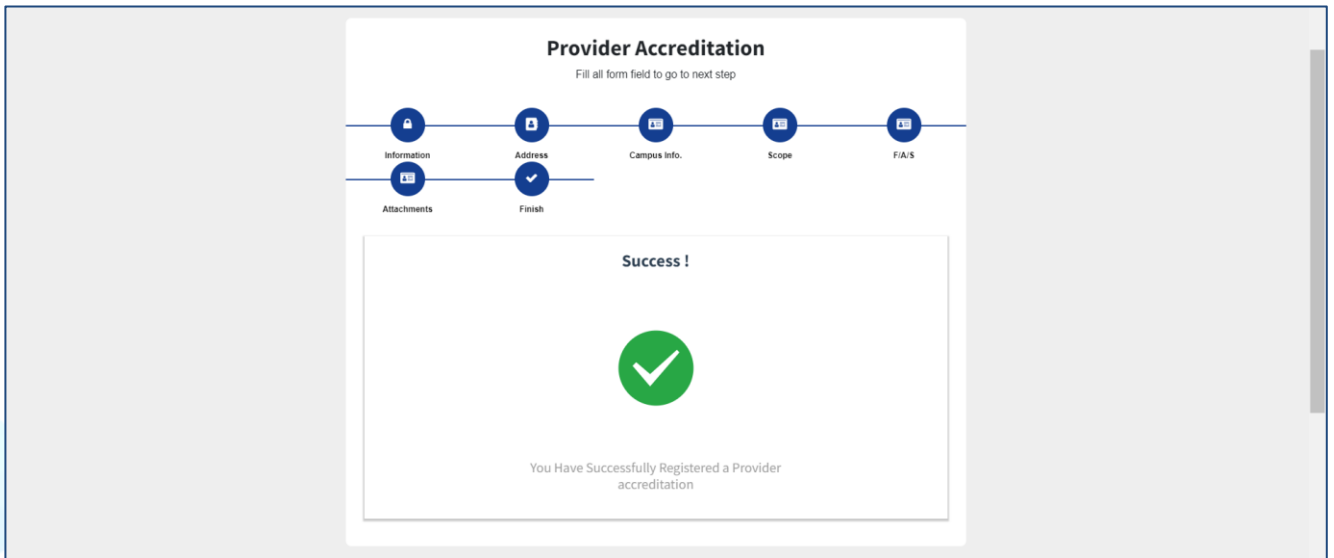
- Select Facilitators, Assessors and Moderators
- Click on Choose File and add SLA agreement

6.8 STEP 8- Upload Attachments

Attachments

TAX CLEARANCE* Choose File No file chosen	DIRECTOR CV* Choose File No file chosen	
CIPC Choose File No file chosen	COMPANY PROFILE* Choose File No file chosen	
BANK ACCOUNT CONFIRMATION* Choose File No file chosen	ORGANOGRAM* Choose File No file chosen	
BUSINESS LEASE AGREEMENT* Choose File No file chosen	PROOF OF OWNERSHIP* Choose File No file chosen	
BUSINESS OCCUPATIONAL HEALTH & SAFETY CERTIFICATE/REPORT* Choose File No file chosen	BBBEEE AFFIDAVIT* Choose File No file chosen	
PROGRAMME CURRICULUM* Choose File No file chosen	IT SERVICING & MAINTAINANCE CONTRACT* Choose File No file chosen	
LEARNER ACHIEVEMENT SPREADSHEET* Choose File No file chosen	QUALITY MANAGEMENT SYSTEM* Choose File No file chosen	QCTO REFERRAL LETTER* Choose File No file chosen
PRIMARY ETQA REFERRAL LETTER Choose File No file chosen	BUSINESS ACCOUNTANT SOLVENCY LETTER* Choose File No file chosen	

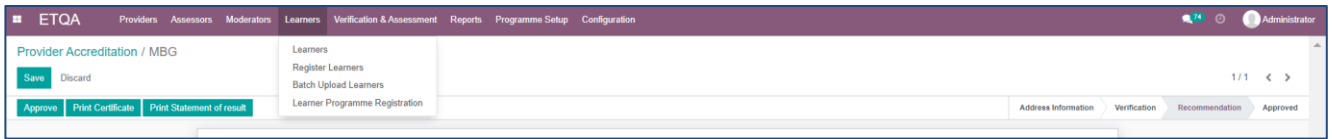
- Upload all required attachments
- Check the declaration tic-box
- Click **Confirm**



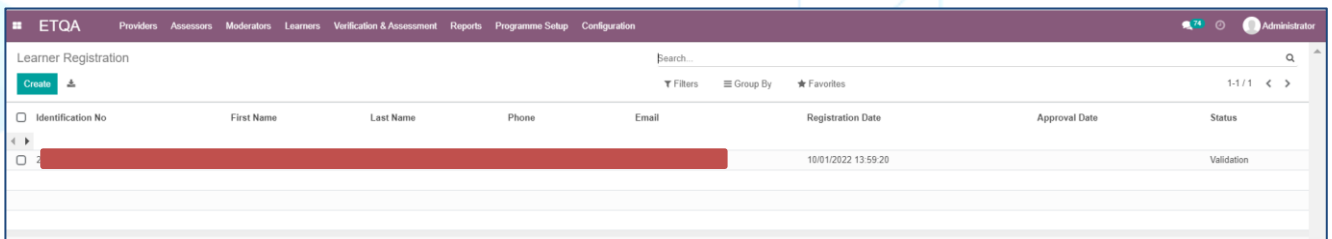
You have successfully registered as a provider the system. A notification will then be sent to the INSETA ETQA team for verification and approval.

7 Learner Registration

Logged in as a provider

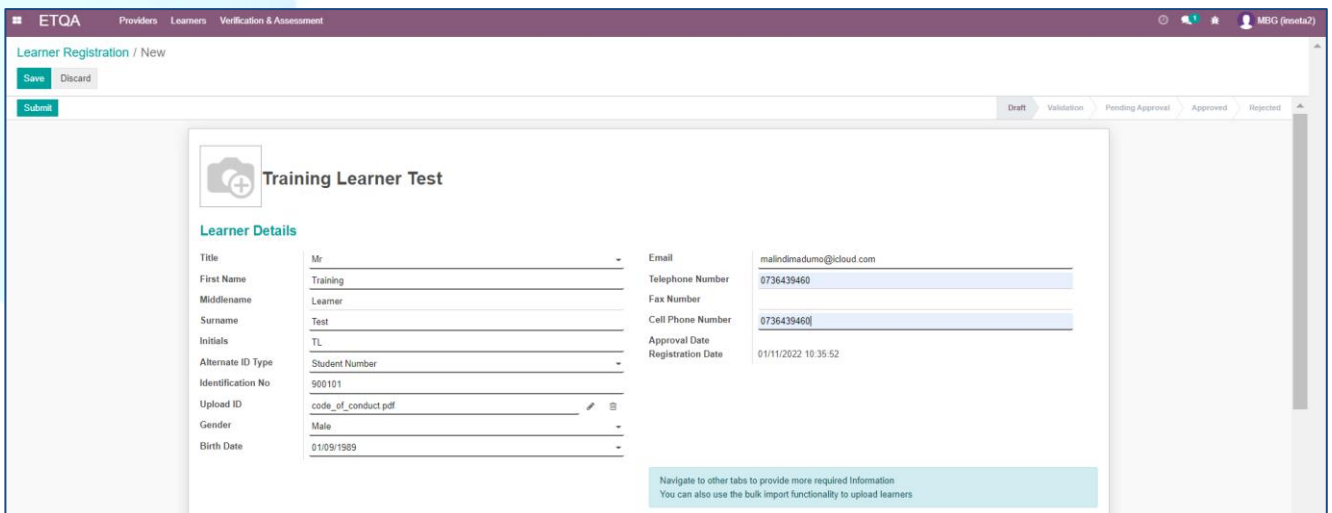


- ☞ Click on the menu icon , then click on **ETQA**
- ☞ Click the **Learners**, then **Register Learners** button



- ☞ Click on the **Create** button

7.1 STEP 1- Register Learner details



ETQA Providers Learners Verification & Assessment

Learner Registration / New

Save Discard

Navigate to other tabs to provide more required Information
You can also use the bulk import functionality to upload learners

Contact Information Citizenship & Other Info Programme registration Financial Budget lines

Physical Address

Physical Code Broadacres shopping centre

Physical Address Line 1 Cedar and Valley road

Physical Address Line 2 Work Address3

Physical Address Line 3

Physical Suburb Fourway Gardens

Physical City Johannesburg

Physical Province Zamora (ES)

Physical Urban/Rural Urban

Physical Municipality Johannesburg Metro

Postal Address

Use physical address for postal address?

Postal Code 2222

Postal Address Line 1 Broadacres shopping centre

Postal Address Line 2 Cedar and Valley road

Postal Address Line 3

Postal Suburb Fourway Gardens

Postal City Johannesburg

Postal Province Zamora (ES)

STATSSA Area code Johannesburg North

🔗 Capture Learner details



Please note that the fields with the bold underline are mandatory and should be completed

🔗 Capture Contact Information

7.2 STEP 2- Fill in Citizenship & Other Information

Learner Registration / New

Save Discard

Navigate to other tabs to provide more required Information
You can also use the bulk import functionality to upload learners

Contact Information Citizenship & Other Info Programme registration Financial Budget lines

Citizenship

Citizen Res. Status South Africa

Nationality South Africa

Home Language isiXhosa

Status

Disability Status None

Equity Black African

Occupation

Current Occupation Administratar

Years in Occupation 2

Experience in Occupation Business Administration

OFO Occupation 2021-2019-441903 - Program or Project Administrators

Education / Training Info

Last school EMIS Zwifhuzwavhudi Secondary

Last school year 2019

POPI Act Status Agree

POPI Act Date Status 01/11/2022

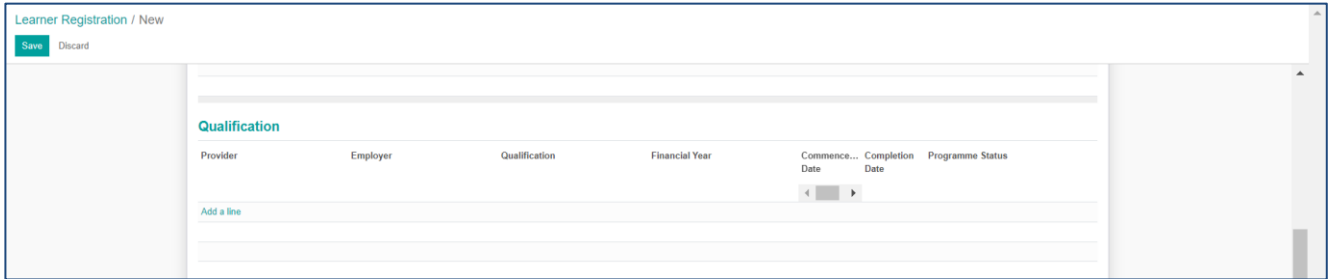
Highest Level Of Education Matric / Grade 12

Highest Education Description Matric

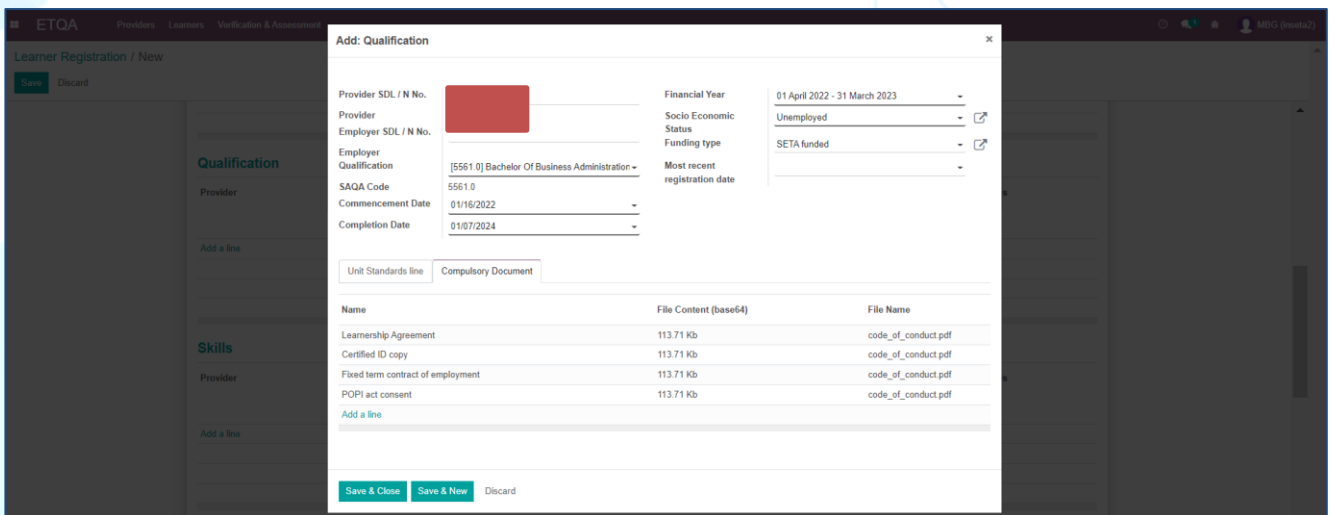
🔗 Navigate to the Citizenship & other Info tab

🔗 Capture required information

7.3 STEP 3- Learner Programme Registration

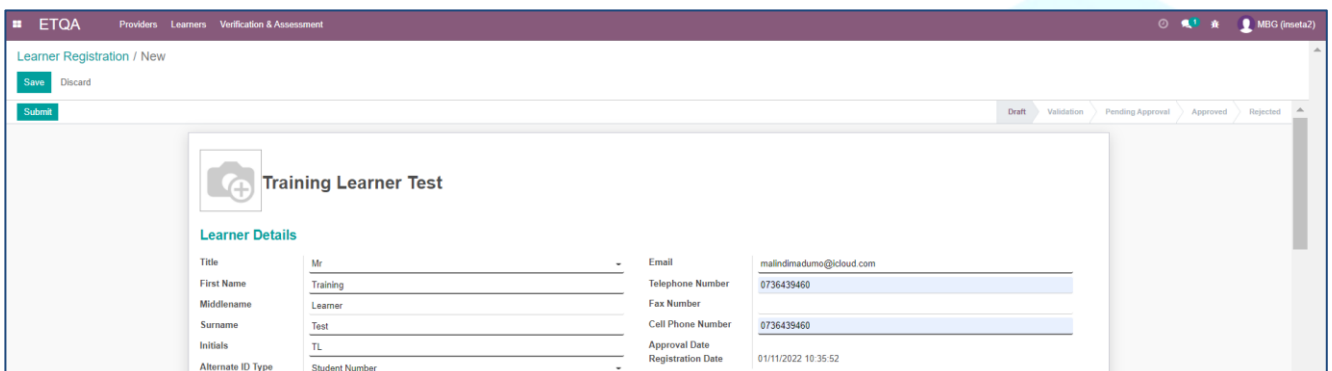


- 🖱️ Navigate to the Programme Registration tab
- 🖱️ Click on add new line on relevant program (i.e., Qualification)
- 🖱️ Click on **Add a Line**



- 🖱️ Fill in the Qualification details
- 🖱️ Capture Unit Standard by clicking on **Add New line**
- 🖱️ Upload compulsory documents by clicking on the file content field and upload files
- 🖱️ Click **Save & Close**

Capture all relevant programs



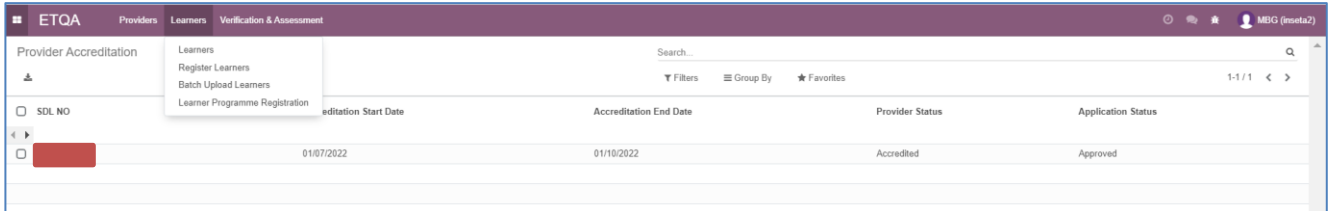
🔗 Click on the **Save** and then **Submit** button



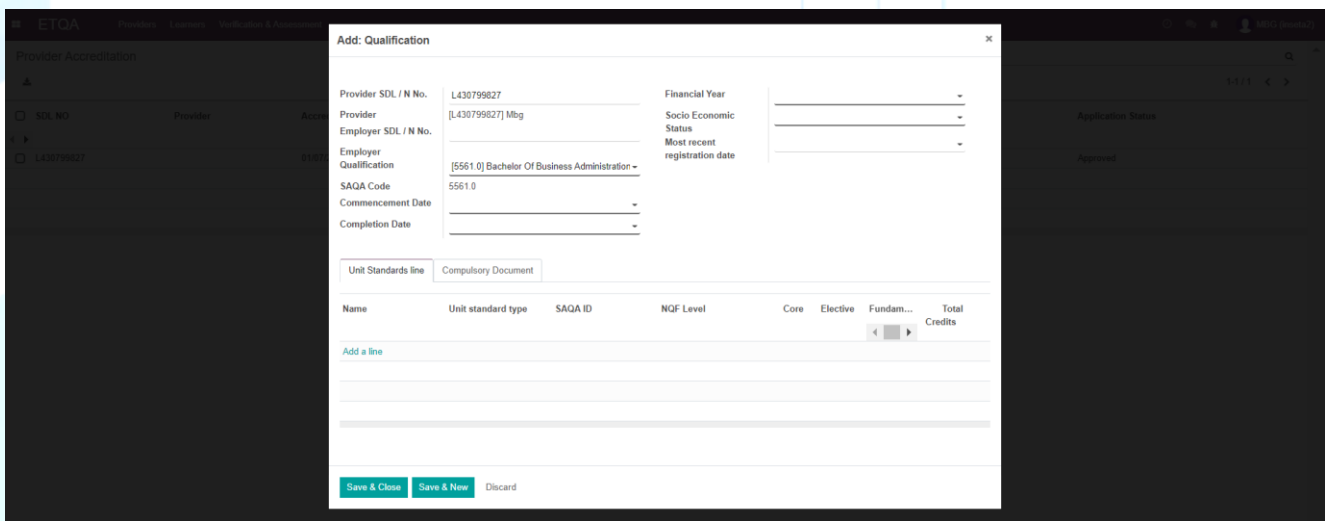
You have successfully registered the learner on the system. An email will then be sent to the Evaluation Committee for verification

8 Learner Programme Registration (Existing Learners)

This section provides a guide on how to register programmes for learners that are already registered on the MIS system.



Click **Learners** and then **Learner Programme Registration**



- ☞ Select Program
- ☞ Click **Add a line**
- ☞ Fill in the Qualification details
- ☞ Capture Unit Standard by clicking on **Add New line**
- ☞ Upload compulsory documents by clicking on the file content field and upload files
- ☞ Click **Save & Close**

9 Verification

The screenshot shows the ETQA interface. The 'Verification & Assessment' menu is open, showing options like 'Learners', 'Register Learners', 'Batch Upload Learners', and 'Learner Programme Registration'. Below the menu is a table with the following data:

Verification number	Provider SDL / N No.	Date of Request	Verification Date	Verified	Status
[Redacted]	[Redacted]	02/01/2022	01/19/2022	<input type="checkbox"/>	ETQA Admin to Approve
[Redacted]	[Redacted]	01/03/2022	01/02/2022	<input checked="" type="checkbox"/>	New verification
[Redacted]	[Redacted]	01/15/2022	01/25/2022	<input type="checkbox"/>	Request Rejection
[Redacted]	[Redacted]	02/15/2022	11/28/2021	<input checked="" type="checkbox"/>	Verification report

- 🔗 Click **Verification and Assessment**, then **Verification**
- 🔗 Click **Create**

The screenshot shows the 'New Verification' form. The 'Verification number' field is highlighted. Other fields include 'Provider SDL / N No.', 'Provider Name' (pre-filled with '[430799827] Mbg'), 'Date of Request' (pre-filled with '01/12/2022'), and 'No of learners' (pre-filled with '1'). The 'Assessment type' section has radio buttons for 'Qualification', 'Learnership', 'Skill', 'Internship', 'Bursary', 'Candidacy', and 'Willvet'.

- 🔗 The Provider and SDL is auto populated using the logged in provider
- 🔗 Capture No. of learners and date of request
- 🔗 Select Assessment type

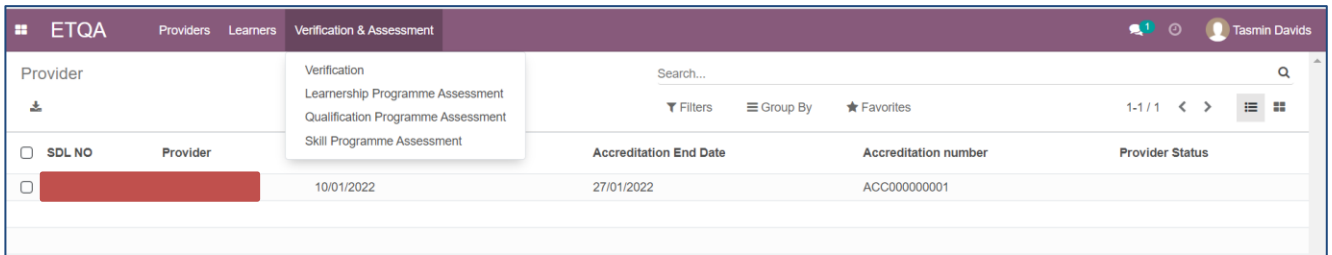
The screenshot shows the 'Add Documents' dialog box. It has a 'Document title' field (pre-filled with 'Document Test') and an 'Upload File' field (pre-filled with 'code_of_conduct.pdf'). There are 'Save & Close', 'Save & New', and 'Discard' buttons at the bottom.

- 🔗 To add provider documents, click **Add a line**
- 🔗 Click **Create**
- 🔗 Capture document title and then Upload
- 🔗 Click **Save & Close** and then **Submit**



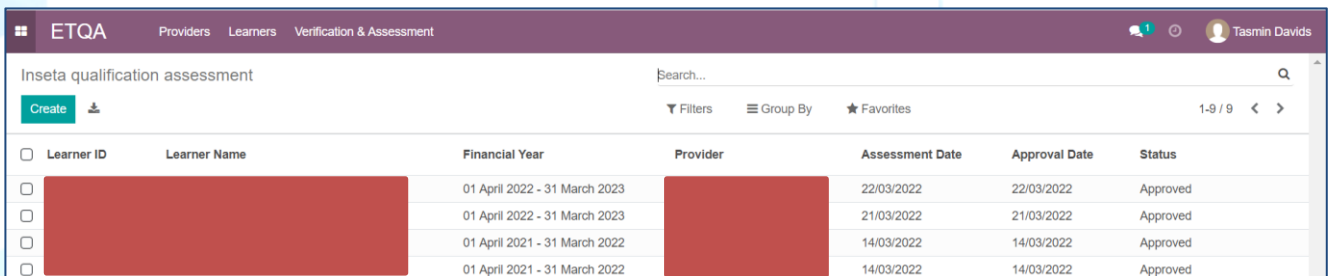
The verification is then submitted to ETQA admin.

10 Programme Assessment



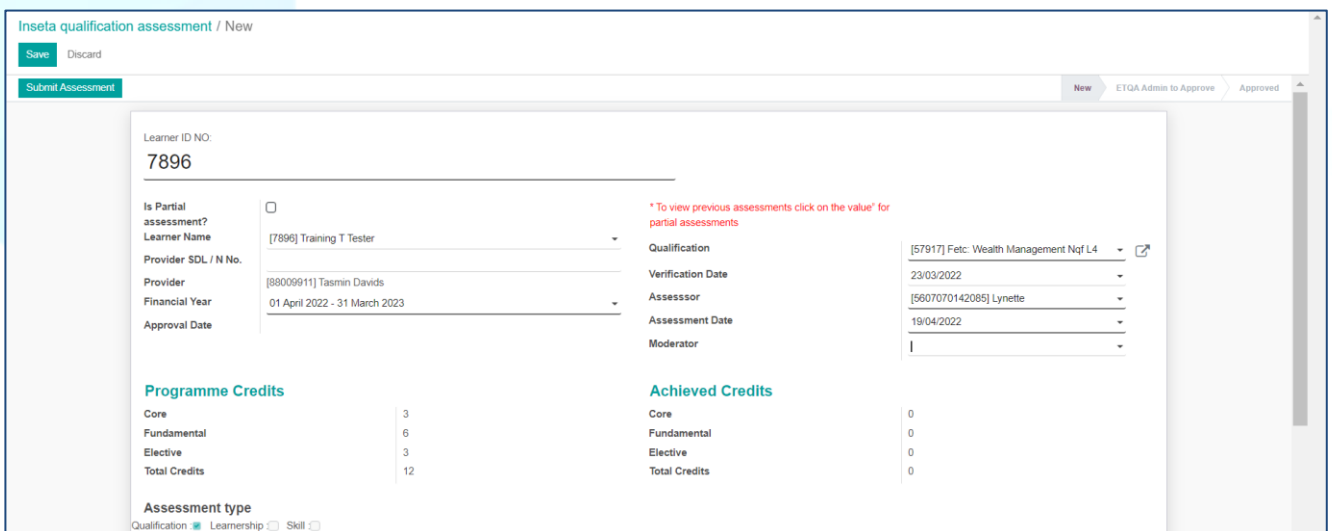
The screenshot shows the ETQA application interface. The top navigation bar includes 'ETQA', 'Providers', 'Learners', and 'Verification & Assessment'. A dropdown menu is open under 'Verification & Assessment', listing 'Verification', 'Learnership Programme Assessment', 'Qualification Programme Assessment', and 'Skill Programme Assessment'. Below the menu, a table displays assessment data with columns for 'SDL NO', 'Provider', 'Accreditation End Date', 'Accreditation number', and 'Provider Status'. A red box highlights the 'Provider' column in the first row.

- 🖱️ Click **ETQA** module
- 🖱️ Click **Verification & Assessment**, then Learnership or Qualification Programme Assessment



The screenshot shows the 'Inseta qualification assessment' page. It features a 'Create' button and a table with columns: 'Learner ID', 'Learner Name', 'Financial Year', 'Provider', 'Assessment Date', 'Approval Date', and 'Status'. The table contains four rows of data, with red boxes highlighting the 'Learner ID' and 'Provider' columns in the first three rows.

- 🖱️ Click **Create**



The screenshot shows the 'Inseta qualification assessment / New' form. It includes a 'Submit Assessment' button and a 'Save' button. The form contains several fields: 'Learner ID NO.' (7896), 'Is Partial assessment?' (checkbox), 'Learner Name' ([7896] Training T Tester), 'Provider SDL / N No.', 'Provider' ([88009911] Tasmin Davids), 'Financial Year' (01 April 2022 - 31 March 2023), 'Approval Date', 'Qualification' ([57917] Fetc: Wealth Management Nqf L4), 'Verification Date' (23/03/2022), 'Assessor' ([5607070142085] Lynette), 'Assessment Date' (19/04/2022), and 'Moderator'. Below these fields are two sections: 'Programme Credits' and 'Achieved Credits', each with a table of credit values for 'Core', 'Fundamental', 'Elective', and 'Total Credits'.

- 🖱️ Select learner and financial year
- 🖱️ Check the Is Partial assessment tick-box if applicable
- 🖱️ Select Qualification, Verification date, Assessor, Assessment date, Moderator and Moderator date
- 🖱️ Select assessment type

The programme credits are displayed

Inseta qualification assessment / [7896] Training T Tester

Save Discard 10 / 10 < >

Moderator

Programme Credits		Achieved Credits	
Core	3	Core	3
Fundamental	6	Fundamental	6
Elective	3	Elective	3
Total Credits	12	Total Credits	12

Assessment type
 Qualification Learnership Skill

Select All Deselect All Update Assessors / Moderator Mark Select as Competent Mark Select as InCompetent

Qualification & Programmes User Manual

Qualification Learnership

Select	Unit Standard Title	Unit standard type...	Code	Credits	Verification Date...	Assessor	Assessment Date	Moderato...	Moderation Date	Assessment Status...
<input checked="" type="checkbox"/>	[7485] Demonstrate Und...	Elective	7485	3		[5607070142085] Lynette...	19/04/2022			Competent
<input checked="" type="checkbox"/>	[120132] Apply Knowledg...	Fundamental	120132	3		[5607070142085] Lynette...	19/04/2022			Competent
<input checked="" type="checkbox"/>	[120132] Apply Knowledg...	Fundamental	120132	3		[5607070142085] Lynette...	19/04/2022			Competent
<input checked="" type="checkbox"/>	[120128] Apply The Law ...	Core	120128	3		[5607070142085] Lynette...	19/04/2022			Competent

Add a line

- ☞ To select all programme line items, click on **Select All**. This can also be done per line item
- ☞ Click on **Deselect All** to remove selection
- ☞ Click on the **Update Assessors/ Moderators** button to update all programme line items
- ☞ To mark all programme line items, click on **Mark Select as Competent**
- ☞ Click on the **Mark Select as Incompetent** button to remove selection

The Achieved credits are populated

For a quick guide on assessment steps, click **User Manual**

Inseta qualification assessment / [7896] Training T Tester

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Programme Credits		Achieved Credits	
Fundamental	6	Fundamental	6
Elective	3	Elective	3
Total Credits	12	Total Credits	12

Assessment type
 Qualification Learnership Skill

Select All Deselect All Update Assessors / Moderator Mark Select as Competent Mark Select as InCompetent

Qualification & Programmes User Manual

*** HOW TO DO ASSESSMENT**

- 1. Open the menu learner -> learner programme registration
 Capture learner to a programme (eg Qualification programme)
- 2. Then go to menu verification and assessment => Qualification Programme assessment
 Create an assessment.
- 3. Ensure you select the captured Qualification and financial year
- Set the assessors and moderators
- Select about two unit standard assessment line and mark all selected as competent
- If there is any Incompetent line, the system generates a partial assessment line for those unit standards and attach it to the programme partial assessment line

To complete the partial assessment

- Create another assessment, check the field, is partial assessment checkbox
- Select the learner, financial year and then the qualification id,
 system will pull both competent and incompetent unit standard assessments but you cannot modify the competent ones because it is already assessed and approved.
- The incompetent ones can be modified, simply check the select box and mark them as competent or so.
- Then proceed with submitting the assessment for approval.

ETQA Providers Learners Verification & Assessment Tasmin Davids

Inseta qualification assessment / [7896] Training T Tester

Save Discard 10 / 10

Submit Assessment New ETQA Admin to Approve Approved

Learner ID NO:
7896

Is Partial assessment?

Learner Name [7896] Training T Tester

Provider SDL / N No. [88009911] Tasmin Davids

Provider [88009911] Tasmin Davids

Financial Year 01 April 2022 - 31 March 2023

Approval Date

Qualification [57917] Fetc: Wealth Management Nqf L4

Verification Date 23/03/2022

Assessor [5607070142085] Lynette

Assessment Date 19/04/2022

Moderator

** To view previous assessments click on the value* for partial assessments*

Programme Credits

Core	3
Fundamental	6
Elective	3
Total Credits	12

Achieved Credits

Core	3
Fundamental	6
Elective	3
Total Credits	12

Assessment type
Qualification Leathership Skill

Click on **Submit Assessment**

ETQA Providers Learners Verification & Assessment Tasmin Davids

Inseta qualification assessment / [7896] Training T Tester

Save Discard 10 / 10

Submit Assessment New ETQA Admin to Approve Approved

Learner ID NO: 7896

Confirmation

Are you sure you want to Submit? All followers will be notified!

Ok Cancel

Click **OK** to confirm



The Programme Assessment is submitted internally for approval