



## MIS IMPLEMENTATION

# DISCRETIONARY GRANTS TRAINING GUIDE

## *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
Tshembani Maluleka	IT Manager		
Kgothatso Modise	Learning Manager		
Akhona Wotshela	Learning Manager		
Bongi Mthombeni	Learning Manager		
Ivy Pilane	Project Manager		
Malindi Madumo	Change Manager		

## Version Control

Date	Version	Summary of changes	Amended by
12 January 2021	1.0	Draft	Malindi Madumo
25 January 2022	1.1	Added DG application examples per programme	Malindi Madumo

Table of Contents

<b>1 Document Review</b> .....	<b>2</b>
Version Control.....	2
<b>2 Introduction</b> .....	<b>4</b>
2.1 Objective.....	4
<b>3 Navigation</b> .....	<b>5</b>
3.1 System Access .....	5
3.2 Icons and terminology .....	5
<b>4 DG Application</b> .....	<b>7</b>
4.1 Apply for a DG.....	7
Learnership for Youth (including PwD) .....	8
Learnership for Workers.....	11
Learnership for Rural Learners .....	13
Internship Matric +.....	14
Internship Diploma/Degree.....	16
Bursaries for Workers .....	17
Skills Programmes for Workers.....	19

## 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 apply Discretionary Grants.

### 2.1 Objective

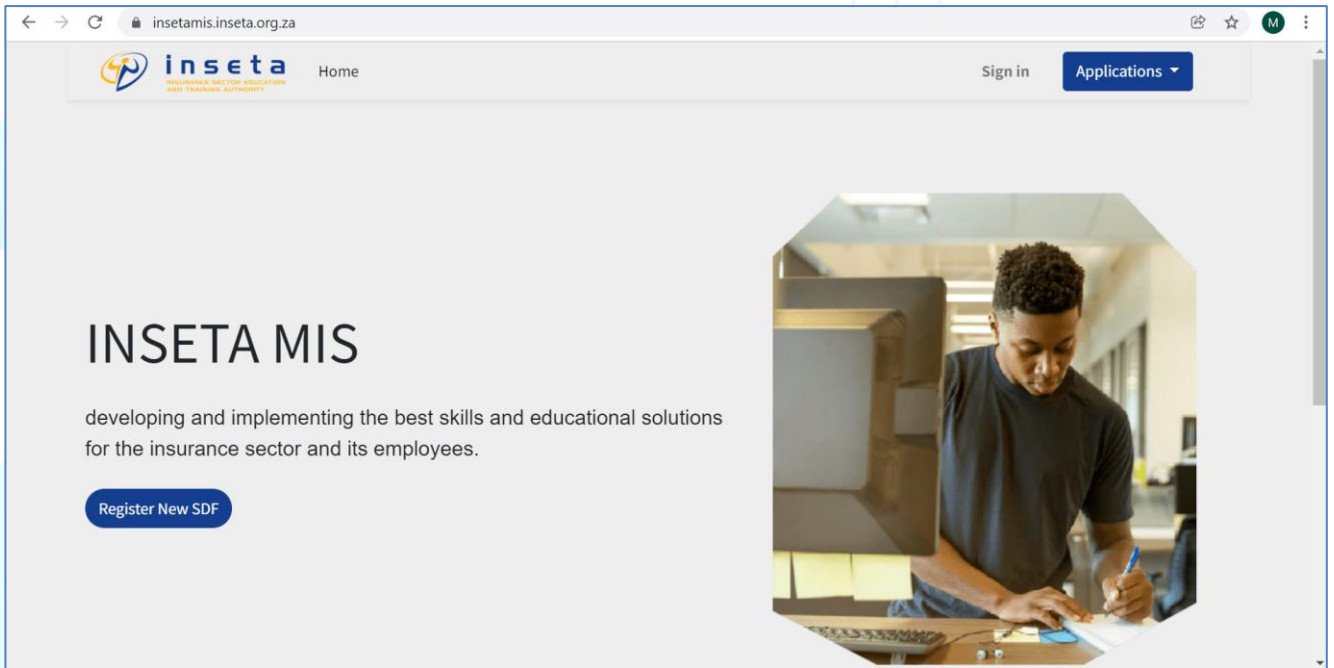
The objective of this training manual is to provide a step-by-step guide on how to execute the following processes on the system:

- Apply for a DG

### 3 Navigation



#### 3.1 System Access

To access the DG 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
DG	Discretionary Grants
DGEC	Discretionary Grants Evaluation Committee
DGAC	Discretionary Grants Adjudication Committee
WSP	Workplace Skills Plan
OFO	Organised Framework for Occupations


## 4 DG Application

Log in as the approved **primary SDF**

### 4.1 Apply for a DG

🖱️ Login as the primary SDF by entering email and password, and then click **Log In**

Name	Organisation	Financial Year	DG type	Due Date	Submitted Date	Approved Date	Rejected Date	Created on	Created by	State
DG/LRN-Y/2022-2023/3155	[N00000015] Providence Consultants & Act...	01 April 2022 - 31 March 2023	Leamerships for Youth (including Pw...	30/04/2022 02:00:00	11/01/2022 02:00:00	11/01/2022 02:00:00		11/01/2022 07:59:03	Test Primary S...	Signed

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

Name	Organisat...	Financial Year	DG type	Due Date	Submitted Dat...	Approved Date	Rejected Date...	Created on	Created b...	State
DG/LRN-Y/2022-2...	[N000000...	01 April 2022 - 31...	Leamerships for Youth (including PwD)	28/02/2023 02...	13/04/2022 02:...	13/04/2022 02:...		13/04/2022 11:16...	Test Test2	Signed
DG/LRN-W/2022-...	[N000000...	01 April 2022 - 31...	Leamership for Workers	28/02/2023 02...	13/04/2022 02:...			13/04/2022 11:13...	Test Test2	Pending Outstan...
DG/LRN-Y/2022-2...	[N000000...	01 April 2022 - 31...	Leamerships for Youth (including PwD)	30/04/2022 02...	13/04/2022 02:...	13/04/2022 02:...		13/04/2022 11:09...	Test Test2	Awaiting COO Si...
DG/LRN-Y/2022-2...	[N000000...	01 April 2022 - 31...	Leamerships for Youth (including PwD)	30/04/2022 02...	13/04/2022 02:...	13/04/2022 02:...		13/04/2022 09:44...	Test Test2	Signed

🖱️ Click **Create**

## Learnership for Youth (including PwD)

Category	Metric	Value
Applied	Tot. Learners Applied	0
	Tot. Disabled Applied	0
	Tot. Applied	0
	Total Amt. Learners Applied	R 0.00
Approved	Tot. Learners Approved	0
	Tot. Disabled Approved	0
	Tot. Learners Approved	0
	Tot. Amt. Learners Approved	R 0.00

☞ Select **Organisation** (Only organisations linked to the SDF in the Skills module can be selected in the dropdown)

☞ Select **DG type** and **Funding window**

☞ To edit details, click **Update Organisation Details**



Edit relevant fields and click **Save**

Organisation	Learnership	Funding Type	Socio Economic Status	Physical Province	Cost Per Student	Total Learners Applied	Total Amount Applied	Start Date	End Date
	<a href="#">Add a line</a>								

Click **Learnership details** and then **Add a line**

Select Funding type

Select Learnership (the Learnership Code is then auto populated)

- ☞ Select Physical Province
- ☞ Select no. of learners (the total amount is auto calculated)
- ☞ Select Start (The start date should be within the selected financial year, the start date will auto calculated and populated)
- ☞ Select employer contact person
- ☞ Click **Save & Close**

DG/LRN-Y/2022-2023/3156

Organisation	QI Solutions	<b>Applied</b>	Tot. Learners Applied	2
SDL No	N000000015		Tot. Disabled Applied	0
Financial Year	01 April 2022 - 31 March 2023		Tot. Applied	2
DG type	Learnerships for Youth (including PwD)		Total Amt. Learners Applied	R 130400 00
Funding Window	DG/2022/010 January 01, 2022 - April 30, 2022		Total Amt. Disabled Applied	R 0 00
Due Date	30/04/2022 02:00:00		Total Amt. Applied	R 130400 00
		<b>Approved</b>	Tot. Learners Approved	0
			Tot. Disabled Approved	0
			Total Learners Approved	0
			Tot. Amt. Learners Approved	R 0 00
			Tot. Amt. Disabled Approved	R 0 00
			Total Amt. Approved	R 0 00

Organisation	Learnership	Funding Type	Socio Economic Status	Physical Province	Cost Per Student	Total Learners Applied	Total Amount Applied	Start Date	End Date
	[01Q01000500780...	SETA funded	Unemployed	Gauteng (ZA)	65200 00	2	130400 00	16/01/2022	29/04/2022

Add a line

- ☞ To apply for multiple programmes, click on **Add a line** once again

DG Dashboard / New

Save Discard

Financial Year 01 A  
 DG type Le  
 Funding Window DG  
 Due Date 30/0

Organisation  
 Learnership Details

**Create Learnership Details**

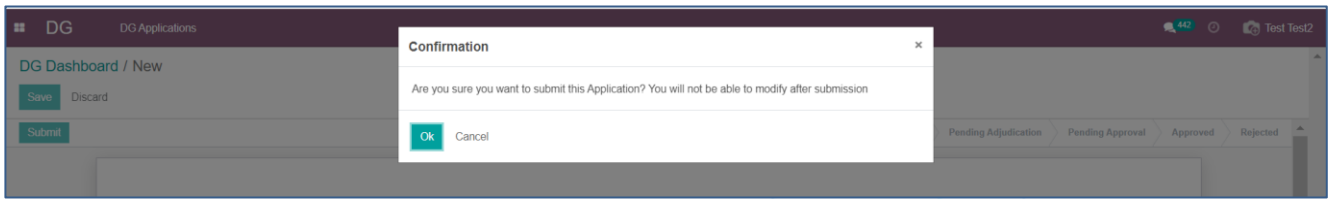
DG type  
 Funding Type  
 Learnership  
 Learnership Code  
 Socio Economic Status  
 Physical Province  
 Cost Per Student  
 Cost Per Disabled  
 No. Learners Applied  
 No. Disabled Applied  
 Total Learners Applied  
 Total Amount Applied  
 Start Date  
 End Date  
 Employer Contact Person  
 Contact Name  
 Contact Surname  
 Contact Person Email

Learnerships for Youth (including PwD)  
 SETA funded  
 [13Q130064001205] Certificate: Financial Planning Nqf L5  
 13Q130064001205  
 Unemployed  
 Northern Cape (ZA)  
 78240 00  
 92640 00  
 5  
 0  
 5  
 391200 00  
 01/05/2022  
 30/04/2023  
 Test - Providence Consultants & Actuaries, Thabo Manganyi  
 Thabo  
 Manganyi  
 thabom@inseta.org.za

End Date  
 30/04/2023

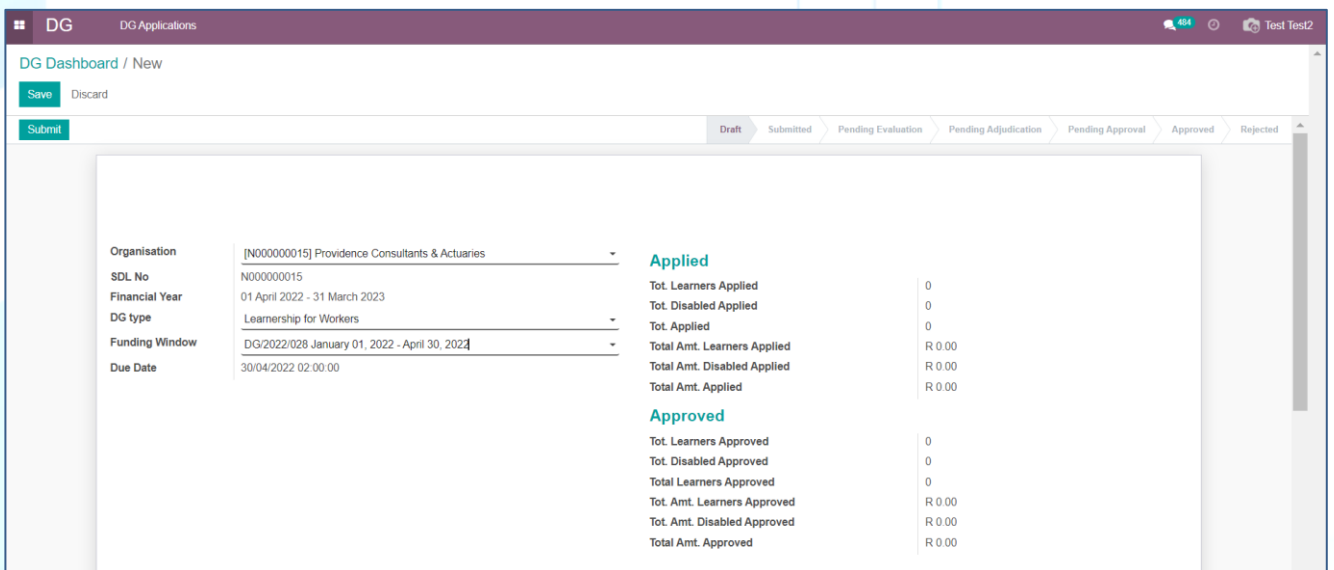
Save & Close Save & New Discard

- ☞ Capture Learnership details
- ☞ Click **Save & Close**



☞ Click **Submit**, and **OK** to confirm

## Leathership for Workers



☞ Select **Organisation** (Only organisations linked to the SDF in the Skills module can be selected in the dropdown)

☞ Select **DG type** and **Funding window**



☞ Click **Leathership details** and then **Add a line**

- ☞ Select Funding type
- ☞ Select Learnership (the Learnership Code is then auto populated)
- ☞ Select Physical Province
- ☞ Select no. of learners (the total amount is auto calculated)
- ☞ Select Start (The start date should be within the selected financial year, the start date will auto calculated and populated)
- ☞ Select employer contact person
- ☞ Click **Save & Close**

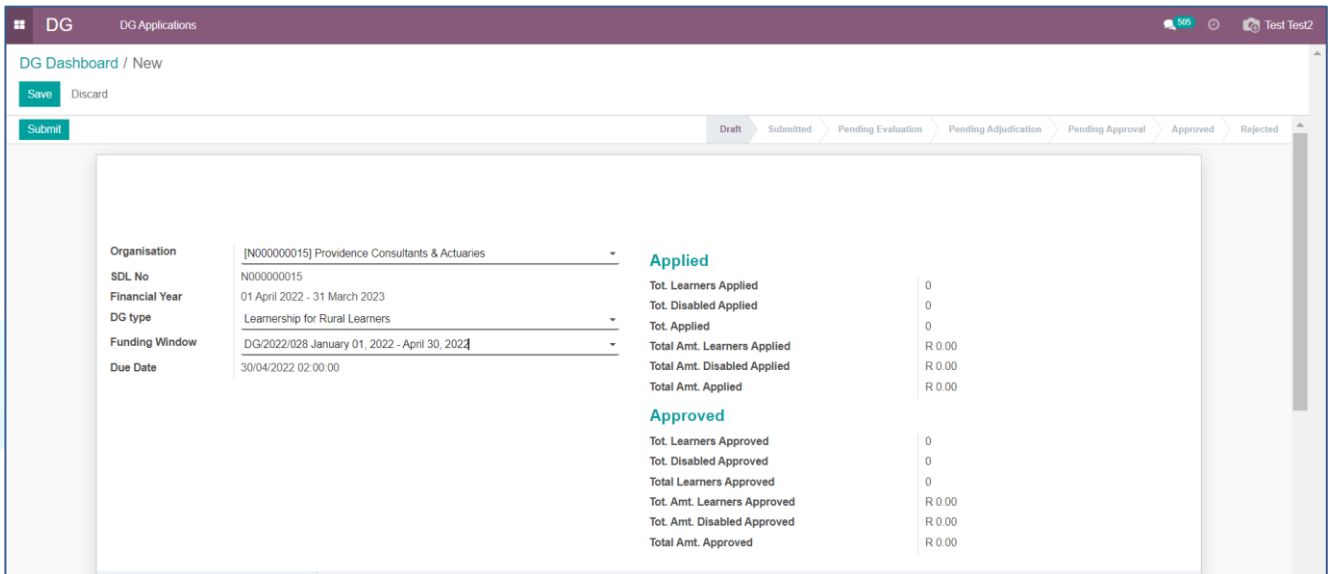
Learnership	Funding Type	Socio Economic ...	Physical Province	Cost Per Stu...	Total Le...	Total Amount...	Start Date	End Date
[29Q290031331404] Felc: Human Resources Management And Practic...	SETA funded	Employed	Northern Cape (ZA)	24000.00	5	120000.00	01/05/2022	30/04/2023

Add a line

- ☞ To apply for multiple programmes, click on **Add a line** once again
- ☞ Capture Learnership details
- ☞ Click **Save & Close**

- ☞ Click **Submit**, and **OK** to confirm

## Learnership for Rural Learners



**Organisation** [N00000015] Providence Consultants & Actuaries

**SDL No** N00000015

**Financial Year** 01 April 2022 - 31 March 2023

**DG type** Learnership for Rural Learners

**Funding Window** DG/2022/028 January 01, 2022 - April 30, 2023

**Due Date** 30/04/2022 02:00:00

**Applied**

Tot. Learners Applied	0
Tot. Disabled Applied	0
Tot. Applied	0
Total Amt. Learners Applied	R 0.00
Total Amt. Disabled Applied	R 0.00
Total Amt. Applied	R 0.00

**Approved**

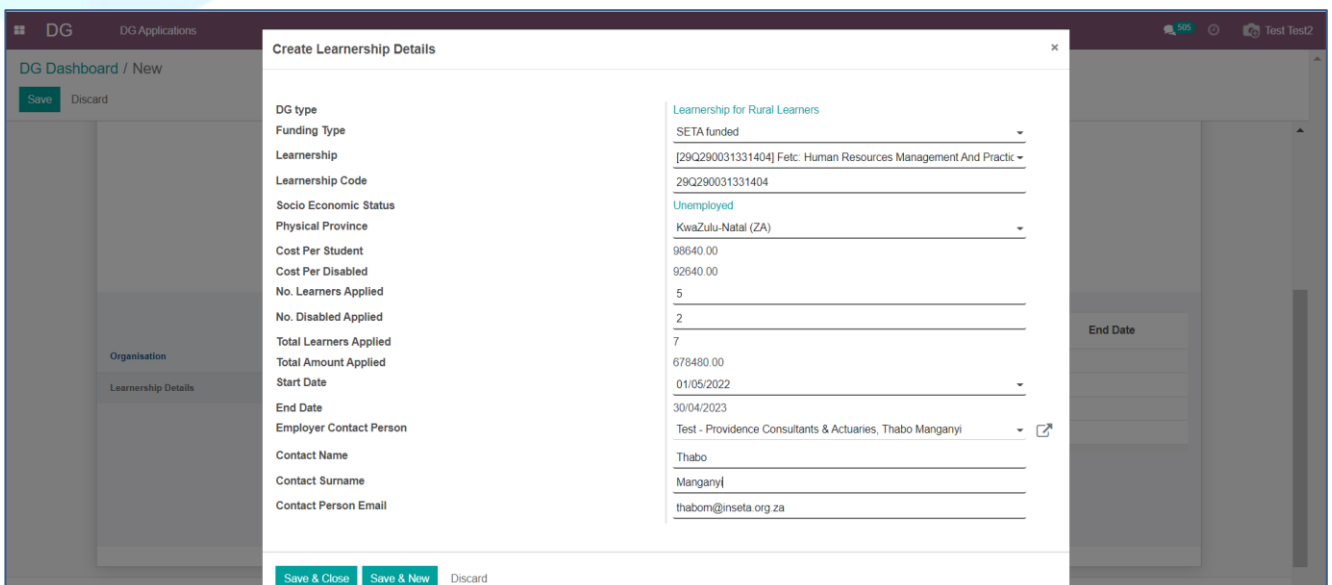
Tot. Learners Approved	0
Tot. Disabled Approved	0
Total Learners Approved	0
Tot. Amt. Learners Approved	R 0.00
Tot. Amt. Disabled Approved	R 0.00
Total Amt. Approved	R 0.00

Select **Organisation** (Only organisations linked to the SDF in the Skills module can be selected in the dropdown)

Select **DG type** and **Funding window**

Organisation	Learnership	Funding Type	Socio Economic Status	Physical Province	Cost Per Student	Total Learners Applied	Total Amount Applied	Start Date	End Date
	Add a line								

Click **Learnership details** and then **Add a line**



**DG type** Learnership for Rural Learners

**Funding Type** SETA funded

**Learnership** [29Q290031331404] Felt: Human Resources Management And Practic

**Learnership Code** 29Q290031331404

**Socio Economic Status** Unemployed

**Physical Province** KwaZulu-Natal (ZA)

**Cost Per Student** 98640.00

**Cost Per Disabled** 92640.00

**No. Learners Applied** 5

**No. Disabled Applied** 2

**Total Learners Applied** 7

**Total Amount Applied** 678480.00

**Start Date** 01/05/2022

**End Date** 30/04/2023

**Employer Contact Person** Test - Providence Consultants & Actuaries, Thabo Manganyi

**Contact Name** Thabo

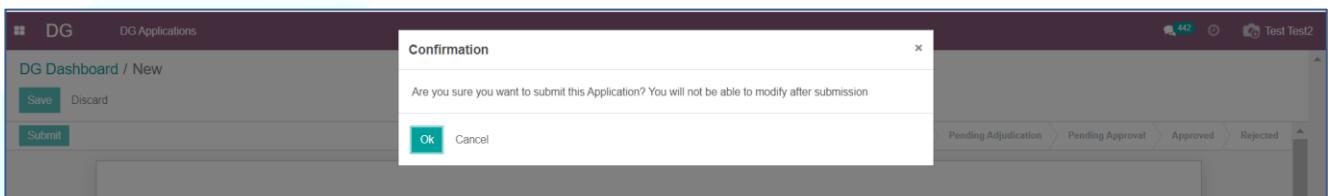
**Contact Surname** Manganyi

**Contact Person Email** thabom@inseta.org.za

- ☞ Select Funding type
- ☞ Select Learnership (the Learnership Code is then auto populated)
- ☞ Select Physical Province
- ☞ Select no. of learners (the total amount is auto calculated)
- ☞ Select Start (The start date should be within the selected financial year, the start date will auto calculated and populated)
- ☞ Select employer contact person
- ☞ Click **Save & Close**

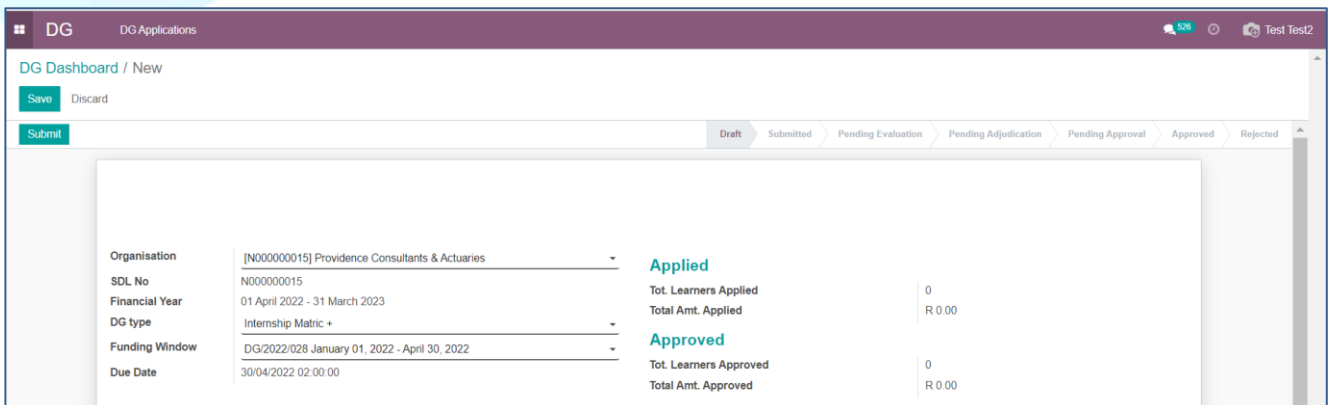
Organisation	Learnership	Funding Type	Socio Economic ...	Physical Province	Cost Per Stu...	Total Le...	Total Amount...	Start Date	End Date
	[29Q29003133140...	SETA funded	Employed	Northern Cape (ZA)	24000.00	5	120000.00	01/05/2022	30/04/2023
Learnership Details	Add a line								

- ☞ To apply for multiple programmes, click on **Add a line** once again
- ☞ Capture Learnership details
- ☞ Click **Save & Close**



- ☞ Click **Submit**, and **OK** to confirm

## Internship Matric +



Organisation	[N00000015] Providence Consultants & Actuaries	<b>Applied</b>	
SDL No	N00000015	Tot. Learners Applied	0
Financial Year	01 April 2022 - 31 March 2023	Total Amt. Applied	R 0.00
DG type	Internship Matric +	<b>Approved</b>	
Funding Window	DG/2022/028 January 01, 2022 - April 30, 2022	Tot. Learners Approved	0
Due Date	30/04/2022 02:00:00	Total Amt. Approved	R 0.00

- ☞ Select **Organisation** (Only organisations linked to the SDF in the Skills module can be selected in the dropdown)
- ☞ Select **DG type** and **Funding window**

Programme Title	Internship Type	Scarce & Critical Skill...	Cost Per Stu...	No of Int...	Total Amount...	Duratio...	Start Date	End Date
Add a line								

☞ Click **Internship Programme details** and then **Add a line**

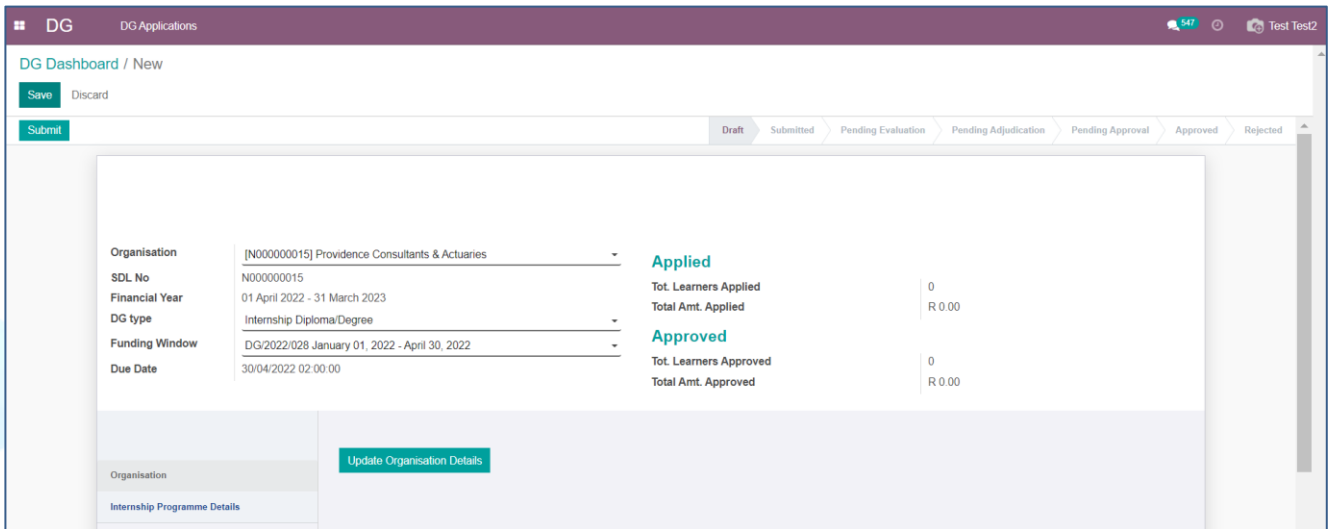
- ☞ Capture Programme Tittle
- ☞ Select Scarce and Critical Skills
- ☞ Select Start and End Date (The start date should be within the selected financial year)
- ☞ Capture No. of interns
- ☞ Indicate if it's a First-time applicant
- ☞ Select employer contact person
- ☞ Click **Save & Close**

Programme Title	Internship Type	Scarce & Critical Skill...	Cost Per Stu...	No of Int...	Total Amount...	Duratio...	Start Date	End Date
Training Manual Test	Matric Certificate	Management Consultant	64800.00	10	648000.00	12	01/05/2022	31/05/2023
Add a line								

- ☞ To apply for multiple programmes, click on **Add a line** once again
- ☞ Capture Learnership details
- ☞ Click **Save & Close**

☞ Click **Submit**, and **OK** to confirm

## Internship Diploma/Degree

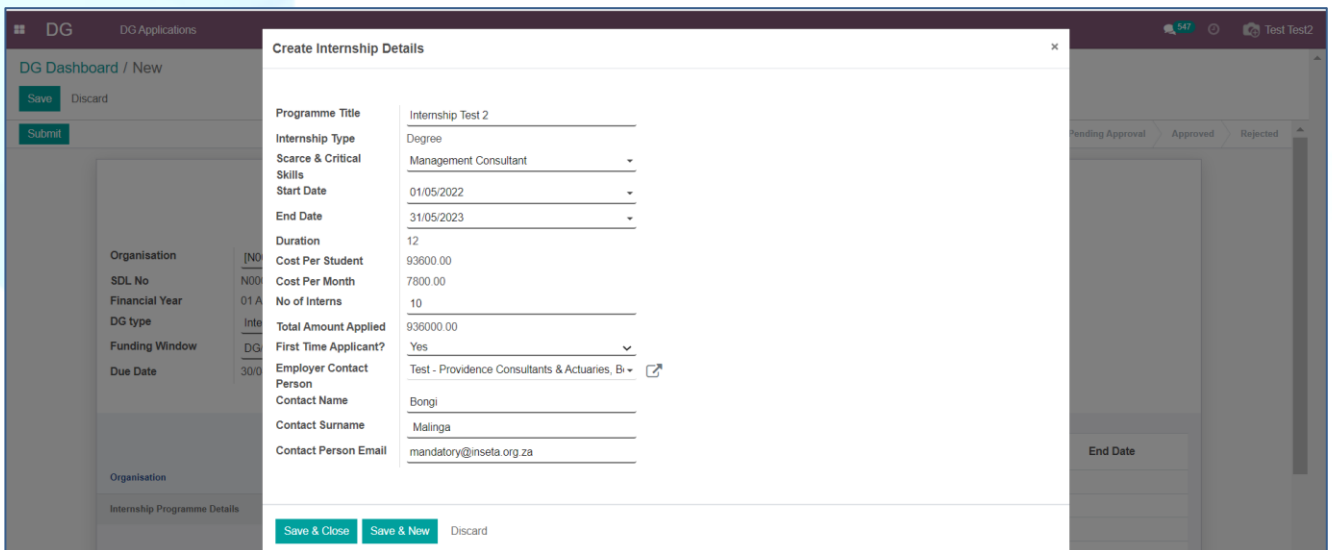


The screenshot shows the 'DG Applications' dashboard. The main form displays the following details:

Organisation	[N00000015] Providence Consultants & Actuaries	<b>Applied</b>
SDL No	N00000015	Tot. Learners Applied: 0
Financial Year	01 April 2022 - 31 March 2023	Total Amt. Applied: R 0.00
DG type	Internship Diploma/Degree	<b>Approved</b>
Funding Window	DG/2022/028 January 01, 2022 - April 30, 2022	Tot. Learners Approved: 0
Due Date	30/04/2022 02:00:00	Total Amt. Approved: R 0.00

Buttons: Save, Discard, Submit, Update Organisation Details.

- ☞ Select **Organisation** (Only organisations linked to the SDF in the Skills module can be selected in the dropdown)
- ☞ Select **DG type** and **Funding window**
- ☞ Click **Internship Programme details** and then **Add a line**



The screenshot shows the 'Create Internship Details' form with the following fields:

Programme Title	Internship Test 2
Internship Type	Degree
Scarce & Critical Skills	Management Consultant
Start Date	01/05/2022
End Date	31/05/2023
Duration	12
Cost Per Student	93600.00
Cost Per Month	7800.00
No of Interns	10
Total Amount Applied	936000.00
First Time Applicant?	Yes
Employer Contact Person	Test - Providence Consultants & Actuaries, B
Contact Name	Bongi
Contact Surname	Malinga
Contact Person Email	mandatory@inseta.org.za

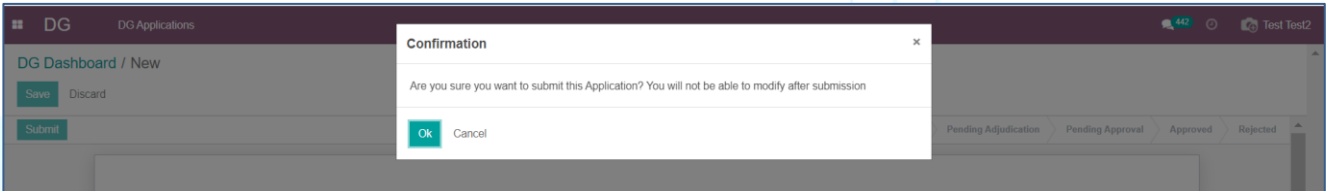
Buttons: Save & Close, Save & New, Discard.

- ☞ Capture Programme Title
- ☞ Select Scarce and Critical Skills
- ☞ Select Start and End Date (The start date should be within the selected financial year)
- ☞ Capture No. of interns
- ☞ Indicate if it's a First-time applicant
- ☞ Select employer contact person
- ☞ Click **Save & Close**



Programme Title	Internship Type	Scarce & Critical Skill...	Cost Per Stu...	No of Int...	Total Amount...	Duratio...	Start Date	End Date
Training Manual Test	Matric Certificate	Management Consultant	64800.00	10	648000.00	12	01/05/2022	31/05/2023
<a href="#">Add a line</a>								

- ☞ To apply for multiple programmes, click on **Add a line** once again
- ☞ Capture Learnership details
- ☞ Click **Save & Close**



- ☞ Click **Submit**, and **OK** to confirm

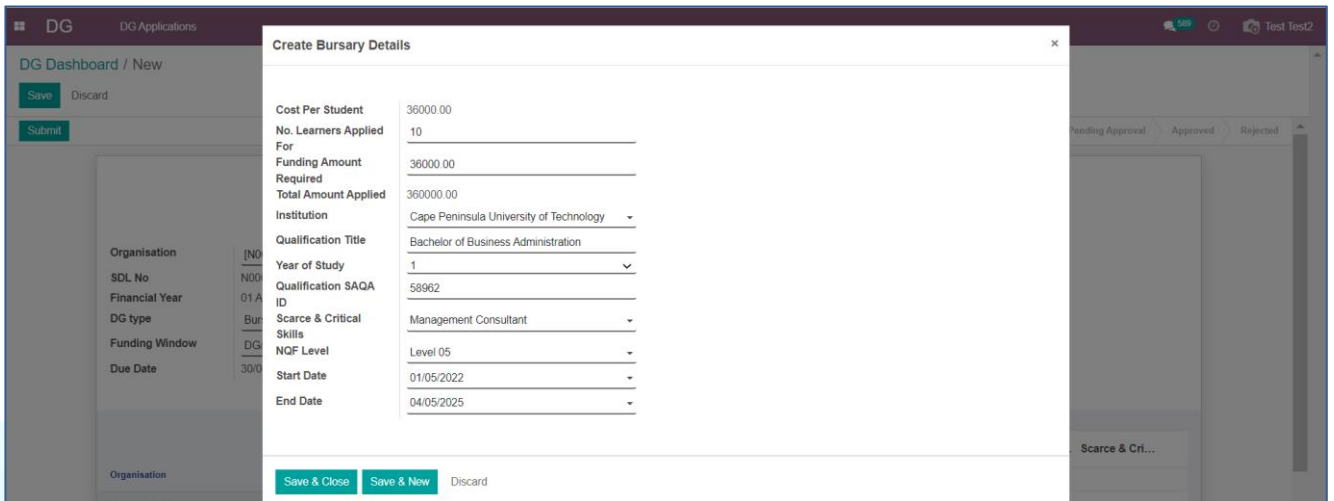
## Bursaries for Workers

Field	Value
Organisation	[N000000015] Providence Consultants & Actuaries
SDL No	N000000015
Financial Year	01 April 2022 - 31 March 2023
DG type	Bursaries for Workers
Funding Window	DG/2022/028 January 01, 2022 - April 30, 2024
Due Date	30/04/2022 02:00:00

Category	Tot. Learners	Total Amt.
<b>Applied</b>	0	R 0.00
<b>Approved</b>	0	R 0.00

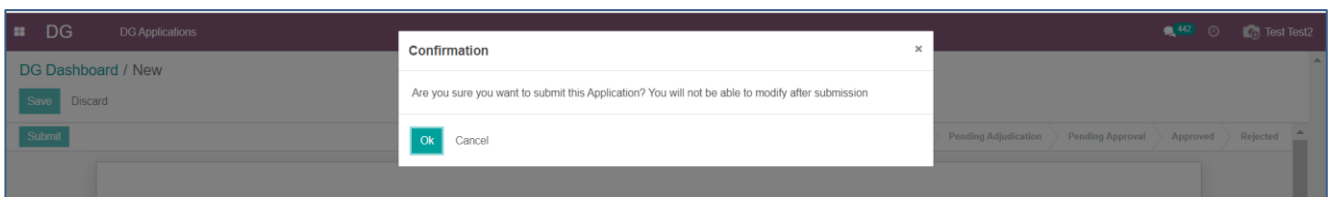
- ☞ Select **Organisation** (Only organisations linked to the SDF in the Skills module can be selected in the dropdown)
- ☞ Select **DG type** and **Funding window**
- ☞ Click **Learner details** and then **Add a line**



- ☞ Capture No. of Learners Applied for
- ☞ Select Institution
- ☞ Capture Qualification Title
- ☞ Capture Year of Study
- ☞ Capture Qualification SAQA ID
- ☞ Select Scarce and Critical Skills
- ☞ Capture NQF level
- ☞ Select Start and End Date (The start date should be within the selected financial year)
- ☞ Click **Save & Close**

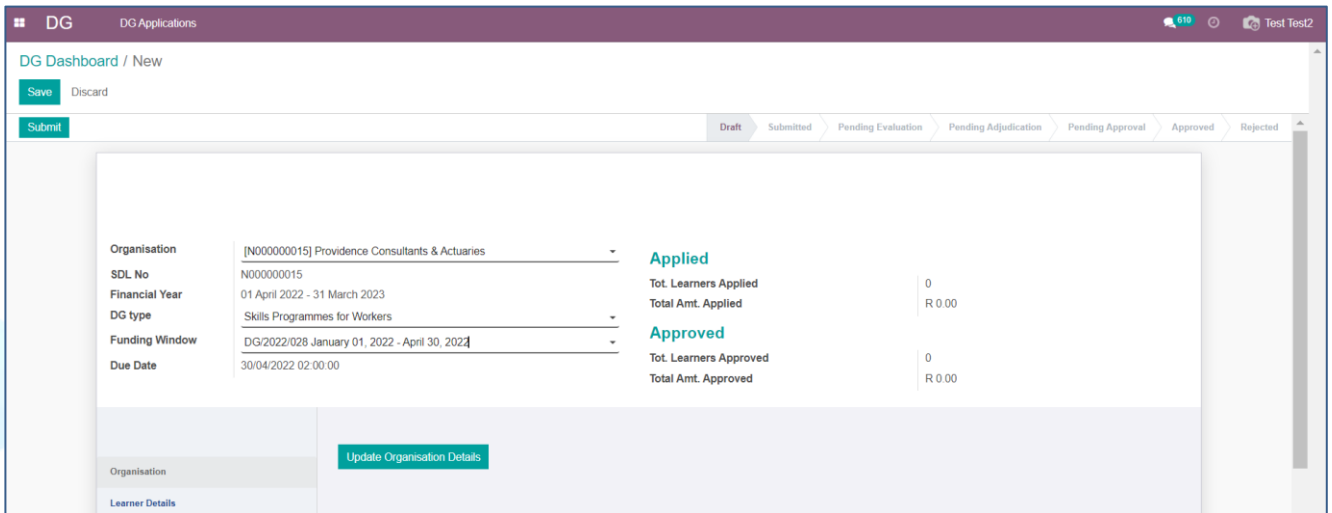
Organisation	No. Lear...	Cost Per Stu...	Funding Am...	Total Amount...	Institution	Full Name Ot...	Qualification...	Year of Stud...	Qualification...	Scarce & Cri...
	10	36000.00	36000.00	360000.00	Cape Penins...		Bachelor of B...	1	58962	Management ...
Learner Details										
Add a line										

- ☞ To apply for multiple programmes, click on **Add a line** once again
- ☞ Capture Learnership details
- ☞ Click **Save & Close**



- ☞ Click **Submit**, and **OK** to confirm

## Skills Programmes for Workers

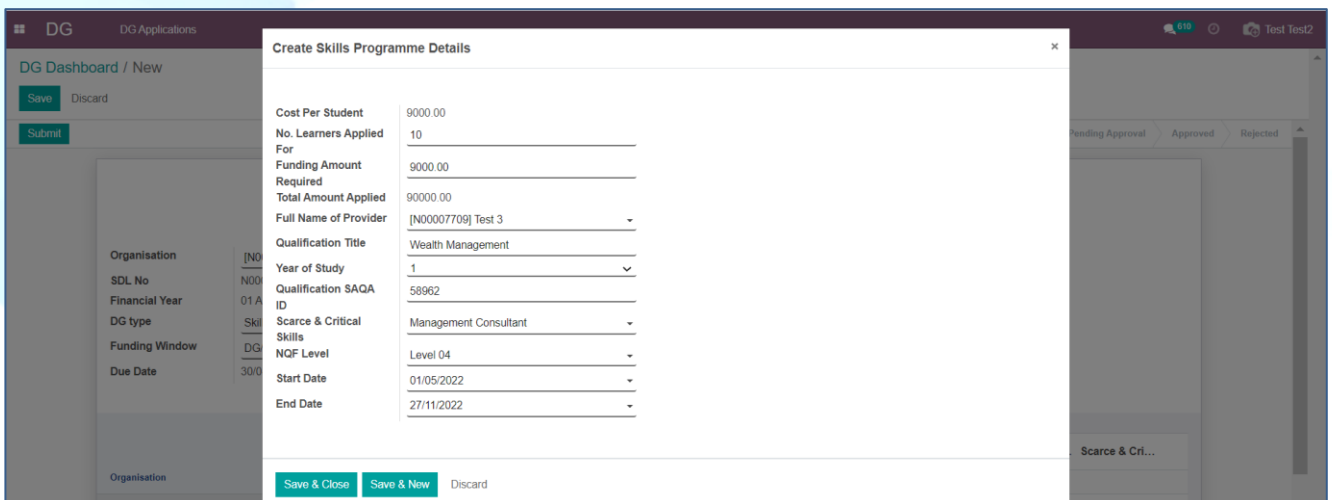


**Organisation:** [N00000015] Providence Consultants & Actuaries  
**SDL No:** N00000015  
**Financial Year:** 01 April 2022 - 31 March 2023  
**DG type:** Skills Programmes for Workers  
**Funding Window:** DG/2022/028 January 01, 2022 - April 30, 2022  
**Due Date:** 30/04/2022 02:00:00

**Applied**  
 Tot. Learners Applied: 0  
 Total Amt. Applied: R 0.00

**Approved**  
 Tot. Learners Approved: 0  
 Total Amt. Approved: R 0.00

- ☞ Select **Organisation** (Only organisations linked to the SDF in the Skills module can be selected in the dropdown)
- ☞ Select **DG type** and **Funding window**
- ☞ Click **Learner details** and then **Add a line**

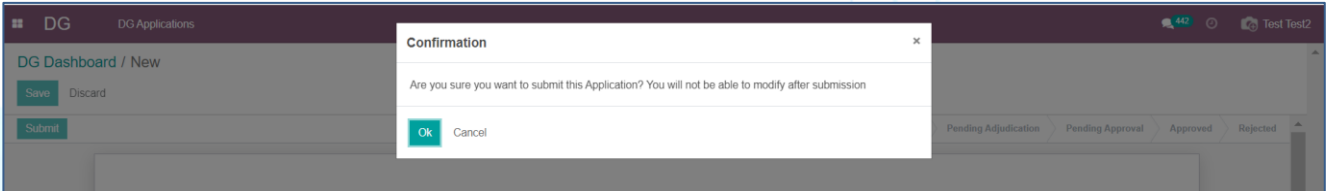


**Cost Per Student:** 9000.00  
**No. Learners Applied For:** 10  
**Funding Amount Required:** 9000.00  
**Total Amount Applied:** 90000.00  
**Full Name of Provider:** [N00007709] Test 3  
**Qualification Title:** Wealth Management  
**Year of Study:** 1  
**Qualification SAQA ID:** 58962  
**Scarce & Critical Skills:** Management Consultant  
**NQF Level:** Level 04  
**Start Date:** 01/05/2022  
**End Date:** 27/11/2022

- ☞ Capture No. of Learners Applied for
- ☞ Select Institution
- ☞ Capture Qualification Title
- ☞ Capture Year of Study
- ☞ Capture Qualification SAQA ID
- ☞ Select Scarce and Critical Skills
- ☞ Capture NQF level
- ☞ Select Start and End Date (The start date should be within the selected financial year)
- ☞ Click **Save & Close**

No. Lear...	Cost Per Stu...	Funding Am...	Total Amount...	Provider	Other Provid...	Qualification...	Year of Stud...	Qualification...	Scarce & Cri...
10	9000.00	9000.00	90000.00	[N00007709] ...		Wealth Mana...	1	58962	Management ...
Add a line									

- ☞ To apply for multiple programmes, click on **Add a line** once again
- ☞ Capture Learnership details
- ☞ Click **Save & Close**



- ☞ Click **Submit**, and **OK** to confirm



**A status notification email is sent out to the employer. Another notification is sent to the Project Administrator for evaluation.**