



EMPOWERED TO **INFLUENCE** AND **INSPIRE!**

## **MIS IMPLEMENTATION**

# **DISCRETIONARY GRANTS TRAINING GUIDE**

**Version 1.1**

### **Related documents**

1. INSETA DISCRETIONARY GRANTS TRAINING GUIDE VERSION 1.1

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## 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		

### Version Control

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

## 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.

### 1.1 Objective

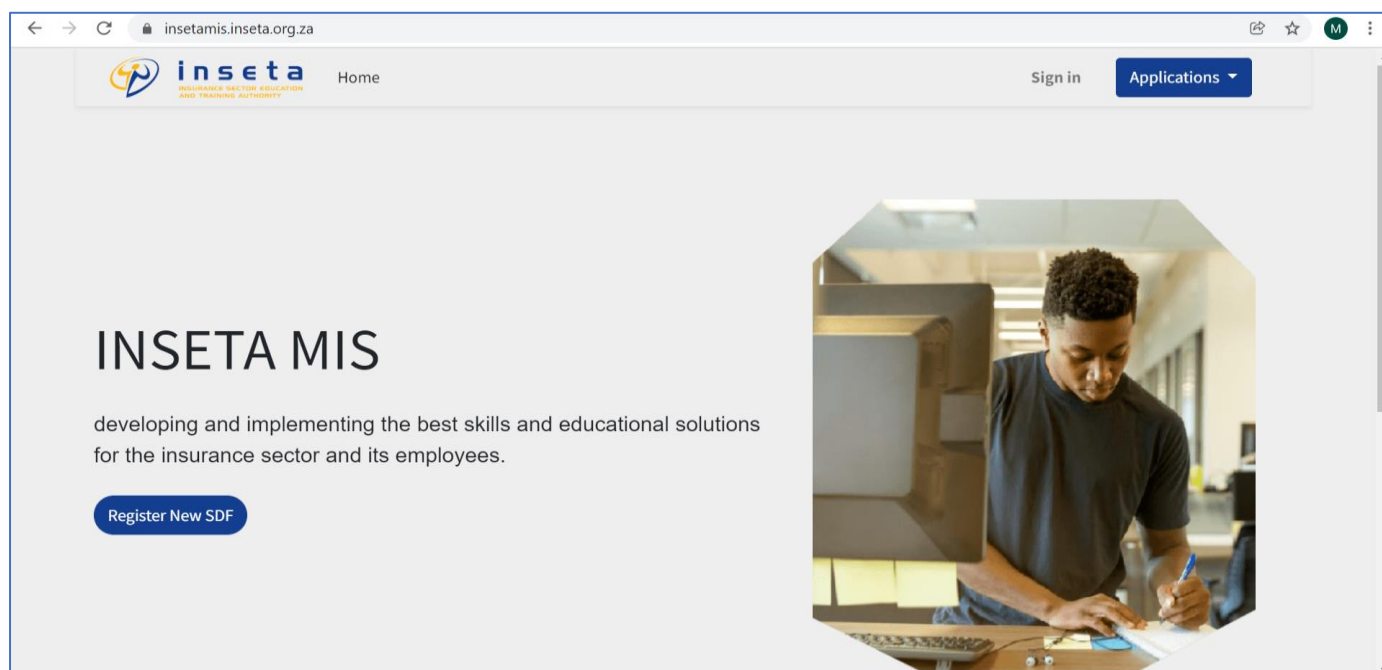
The objective of this training manual is to provide a step-by-step guide on how to execute the following processes on the system:

- 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

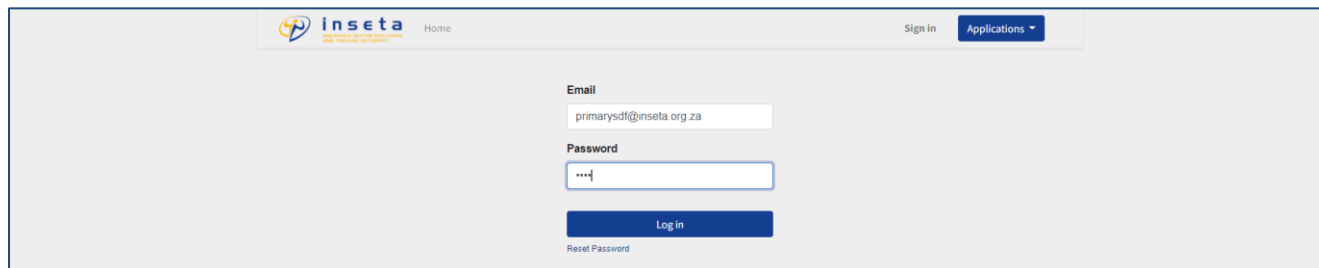
The following table includes abbreviations or notations that are used in the document and on the system.

<b>Term/Acronym</b>	<b>Definition</b>
DG	Discretionary Grants
DGEC	Discretionary Grants Evaluation Committee
DGAC	Discretionary Grants Adjudication Committee
WSP	Workplace Skills Plan
OFO	Organised Framework for Occupations

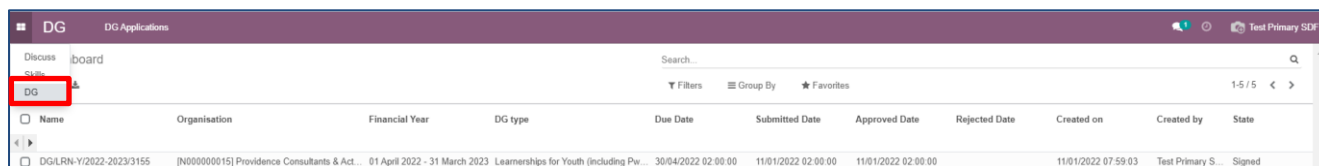
## 4. DG Application

Log in as the approved **primary SDF**


### 4.1 Apply for a DG

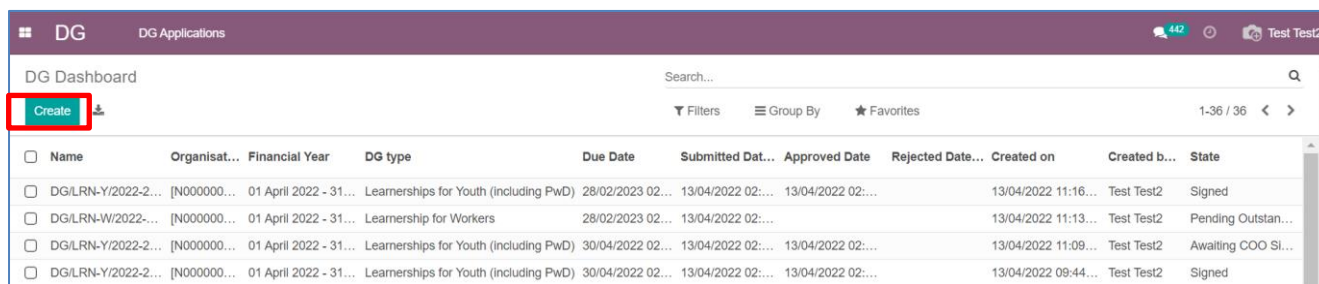


🖱️ Login as the primary SDF by entering email and password, and then click **Log In**



<input type="checkbox"/>	Name	Organisation	Financial Year	DG type	Due Date	Submitted Date	Approved Date	Rejected Date	Created on	Created by	State
<input type="checkbox"/>	DG/LRN-Y/2022-2023/3155	[N000000015] Providence Consultants & Act...	01 April 2022 - 31 March 2023	Leaverships 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**



<input type="checkbox"/>	Name	Organisat...	Financial Year	DG type	Due Date	Submitted Dat...	Approved Date	Rejected Date...	Created on	Created b...	State
<input type="checkbox"/>	DG/LRN-Y/2022-2...	[N0000000...	01 April 2022 - 31...	Leaverships for Youth (including PwD)	28/02/2023 02:...	13/04/2022 02:...	13/04/2022 02:...		13/04/2022 11:16...	Test Test2	Signed
<input type="checkbox"/>	DG/LRN-W/2022-...	[N0000000...	01 April 2022 - 31...	Leavership for Workers	28/02/2023 02:...	13/04/2022 02:...			13/04/2022 11:13...	Test Test2	Pending Outstan...
<input type="checkbox"/>	DG/LRN-Y/2022-2...	[N0000000...	01 April 2022 - 31...	Leaverships 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...
<input type="checkbox"/>	DG/LRN-Y/2022-2...	[N0000000...	01 April 2022 - 31...	Leaverships 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)

## Learnership for Workers

The screenshot shows the 'DG Applications' dashboard with the 'Learnership for Workers' application form. The form is in the 'Draft' stage. The left sidebar contains a 'Save' button and a 'Discard' button. The main content area displays the application details and a summary table.

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

Category	Field	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**

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**

The screenshot shows the 'Create Learnership Details' form. The form is in the 'Draft' stage. The left sidebar contains a 'Save & Close' button, a 'Save & New' button, and a 'Discard' button. The main content area displays the application details and a summary table.

Field	Value
DG type	Learnership for Workers
Funding Type	SETA funded
Learnership	[29Q290031331404] Felc: Human Resources Management And Practic
Learnership Code	29Q290031331404
Socio Economic Status	Employed
Physical Province	Northern Cape (ZA)
Cost Per Student	24000.00
No. Learners Applied	5
Total Learners Applied	5
Total Amount Applied	120000.00
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**

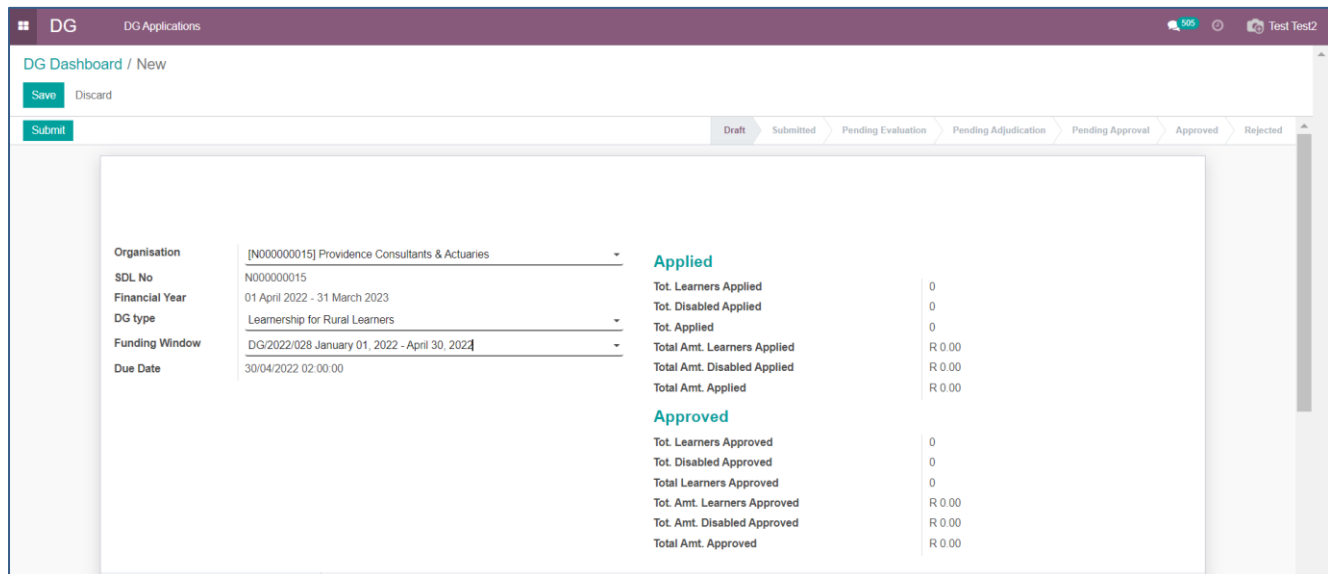
Organisation	Learnership	Funding Type	Socio Economic ...	Physical Province	Cost Per Stu...	Total Le...	Total Amount...	Start Date	End Date
	[29Q29003133140...	SETA funded	Employed	Northern Cape (ZA)	24000.00	5	120000.00	01/05/2022	30/04/2023
Learnership Details	<a href="#">Add a line</a>								

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

The screenshot shows the 'DG Dashboard / New' interface. A 'Confirmation' dialog box is open in the center, asking: 'Are you sure you want to submit this Application? You will not be able to modify after submission'. The dialog has 'OK' and 'Cancel' buttons. In the background, the dashboard shows a 'Save' button, a 'Discard' button, and a 'Submit' button. On the right, there is a progress bar with stages: 'Pending Adjudication', 'Pending Approval', 'Approved', and 'Rejected'. The top right corner shows a user profile 'Test Test2' and a notification count of '442'.

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

## Learnership for Rural Learners



**Organisation** [N000000015] Providence Consultants & Actuaries

**SDL No** N000000015

**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

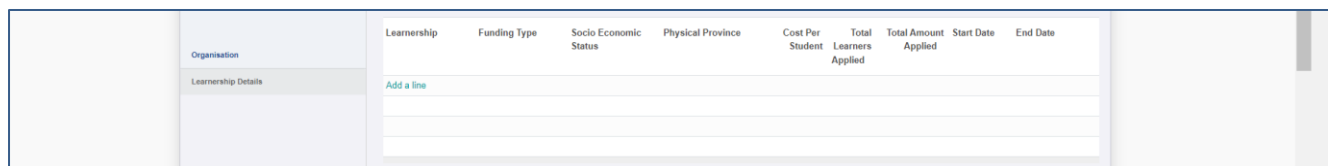
**Applied**

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**

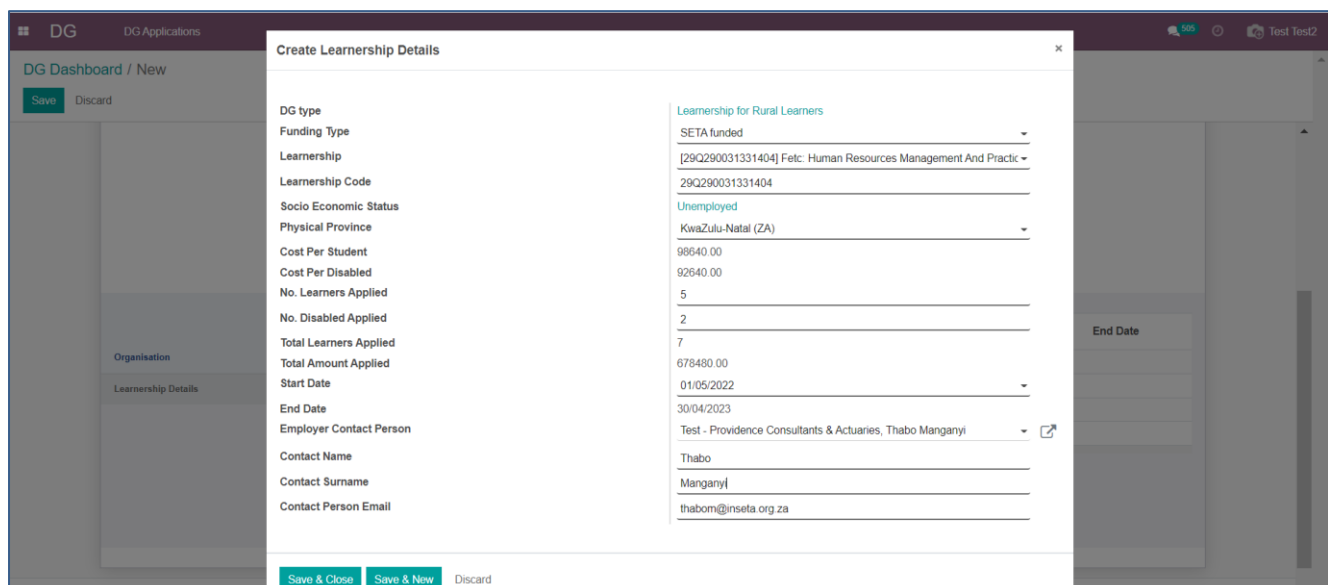
Tot. Learners Approved	0
Tot. Disabled Approved	0
Total Learners Approved	0
Tot. Amt. Learners Approved	R 0.00
Tot. Amt. Disabled Approved	R 0.00
Total Amt. Approved	R 0.00

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



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**



**Create Learnership Details**

**DG type** Learnership for Rural Learners

**Funding Type** SETA funded

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

**Learnership Code** 29Q290031331404

**Socio Economic Status** Unemployed

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

**Cost Per Student** 98840.00

**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

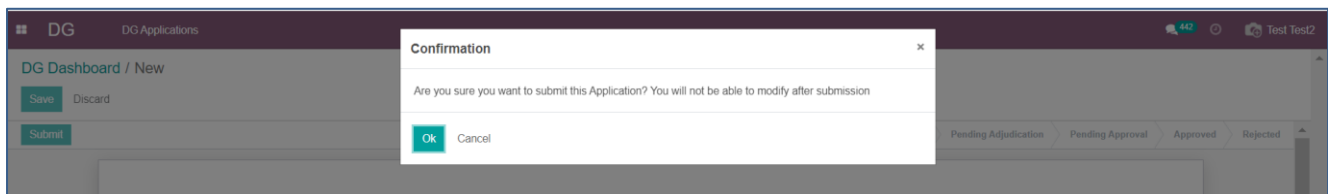
**Save & Close** **Save & New** **Discard**

- 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 +

**DG**
DG Applications

442
Test Test2

DG Dashboard / New

Save Discard

Submit

Draft Submitted Pending Evaluation Pending Adjudication Pending Approval Approved Rejected

Organisation	[N000000015] Providence Consultants & Actuaries	Applied
SDL No	N000000015	Tot. Learners Applied
Financial Year	01 April 2022 - 31 March 2023	Total Amt. Applied
DG type	Internship Matric +	
Funding Window	DG/2022/028 January 01, 2022 - April 30, 2022	Approved
Due Date	30/04/2022 02:00:00	Tot. Learners Approved
		Total Amt. Approved

- 🖱️ 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	Programme Title	Internship Type	Scarce & Critical Skill...	Cost Per Stu...	No of Int...	Total Amount...	Duratio...	Start Date	End Date
Internship Programme Details	<a href="#">Add a line</a>								

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

**Create Internship Details**

Programme Title	Training Manual Test
Internship Type	Matric Certificate
Scarce & Critical Skills	Management Consultant
Start Date	01/05/2022
End Date	31/05/2023
Duration	12
Cost Per Student	64800.00
Cost Per Month	5400.00
No of Interns	10
Total Amount Applied	648000.00
First Time Applicant?	Yes
Employer Contact Person	Test - Providence Consultants & Actuaries, T1
Contact Name	Thabo
Contact Surname	Manganyi
Contact Person Email	thabom@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**

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

**Confirmation**

Are you sure you want to submit this Application? You will not be able to modify after submission

Buttons: OK, Cancel

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

## Internship Diploma/Degree

The screenshot shows the 'DG Applications' dashboard. On the left, there's a sidebar with 'Save' and 'Discard' buttons, and a 'Submit' button. The main area displays the application details for 'Internship Diploma/Degree'. The status is 'Applied'. The details include:

- Organisation: [N000000015] Providence Consultants & Actuaries
- SDL No: N000000015
- Financial Year: 01 April 2022 - 31 March 2023
- DG type: Internship Diploma/Degree
- Funding Window: DG/2022/028 January 01, 2022 - April 30, 2022
- Due Date: 30/04/2022 02:00:00

On the right, there's a summary table:

Status	Tot. Learners	Total Amt.
Applied	0	R 0.00
Approved	0	R 0.00

At the bottom, there's a section for 'Update Organisation Details' and 'Internship Programme 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. The form fields are as follows:

- 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: Bongji
- Contact Surname: Malinga
- Contact Person Email: mandatory@inseta.org.za

At the bottom, there are buttons for 'Save & Close', 'Save & New', and '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...	Duration...	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

- ☞ 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

**DG Dashboard / New**

**Save** **Discard**

**Submit**

**Draft** **Submitted** **Pending Evaluation** **Pending Adjudication** **Pending Approval** **Approved** **Rejected**

Organisation	[N000000015] Providence Consultants & Actuaries	<b>Applied</b>	Tot. Learners Applied	0
SDL No	N000000015		Total Amt. Applied	R 0.00
Financial Year	01 April 2022 - 31 March 2023			
DG type	Skills Programmes for Workers	<b>Approved</b>	Tot. Learners Approved	0
Funding Window	DG/2022/028 January 01, 2022 - April 30, 2024		Total Amt. Approved	R 0.00
Due Date	30/04/2022 02:00:00			

**Update Organisation Details**

Organisation

Learner 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 **Learner details** and then **Add a line**

**Create Skills Programme Details**

Cost Per Student	9000.00
No. Learners Applied	10
Funding Amount	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

**Save & Close** **Save & New** **Discard**

- ☞ 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...	Provider	Other Provid...	Qualification...	Year of Stud...	Qualification...	Scarce & Cri...
Learner Details		10	9000.00	9000.00	90000.00	[N00007709] ...		Wealth Mana...	1	58962	Management ...
		<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



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