



## **MIS IMPLEMENTATION**

# **DISCRETIONARY GRANTS TRAINING GUIDE**

*Version 1.0 Draft*

## 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		
Henry Goliath	PMO 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

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## 2 Introduction

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

### 2.1 Objective

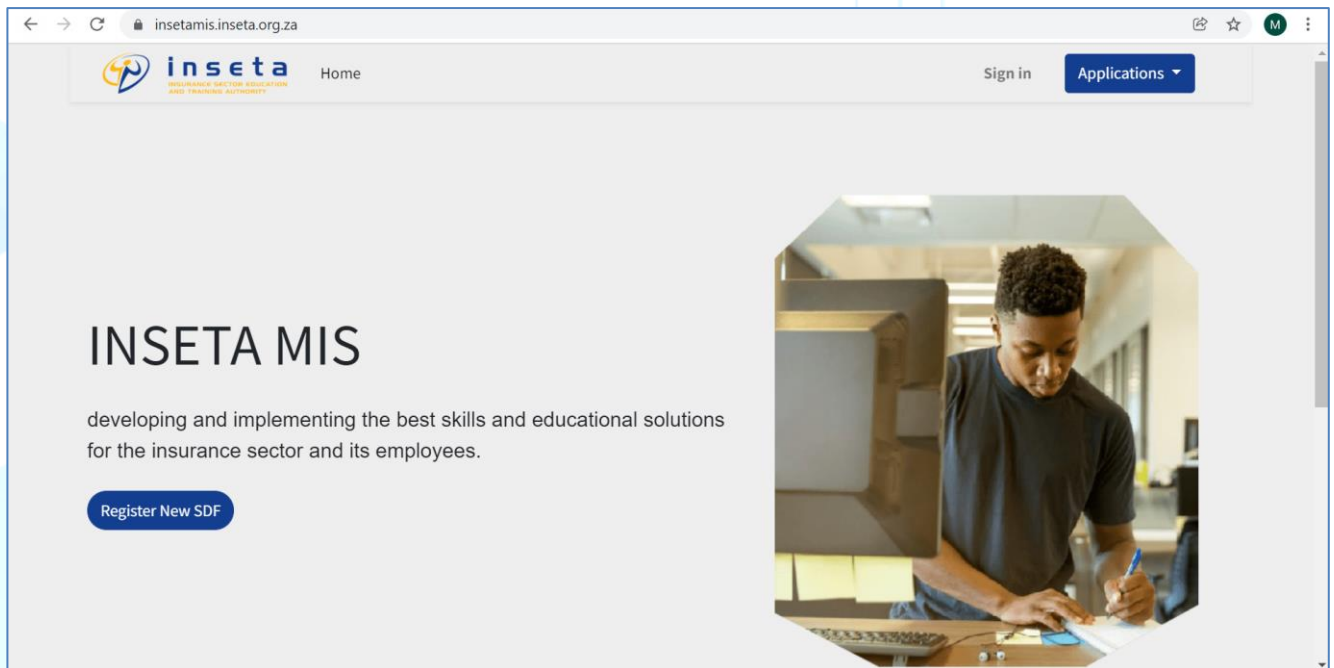
The objective of this training manual is to provide a step-by-step guide on how to execute the following processes on the system:

- 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

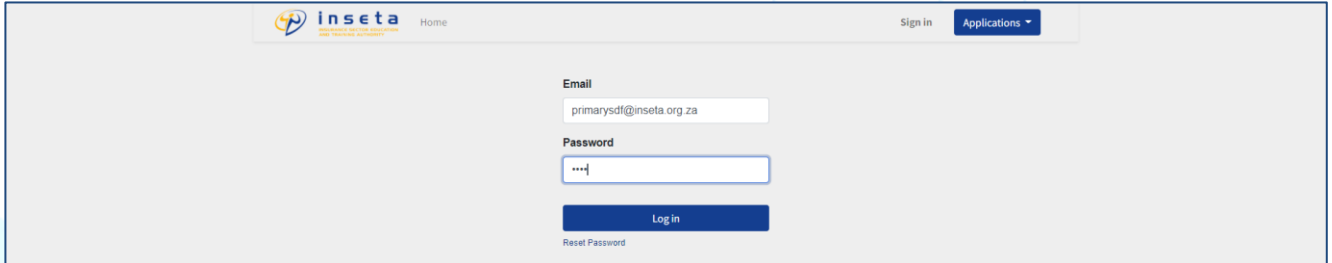
The following table includes abbreviations or notations that are used in the document and on the system.

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

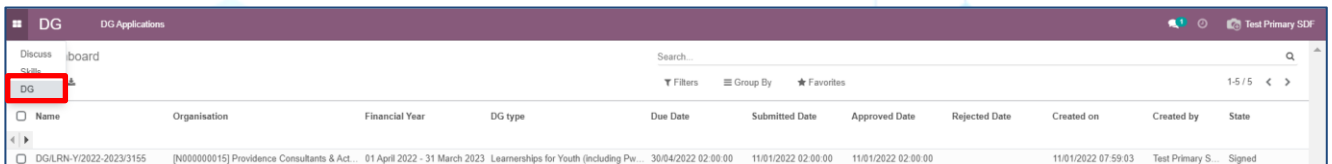
## 4 DG Application

Log in as the approved **primary SDF**


### 4.1 Apply for a DG

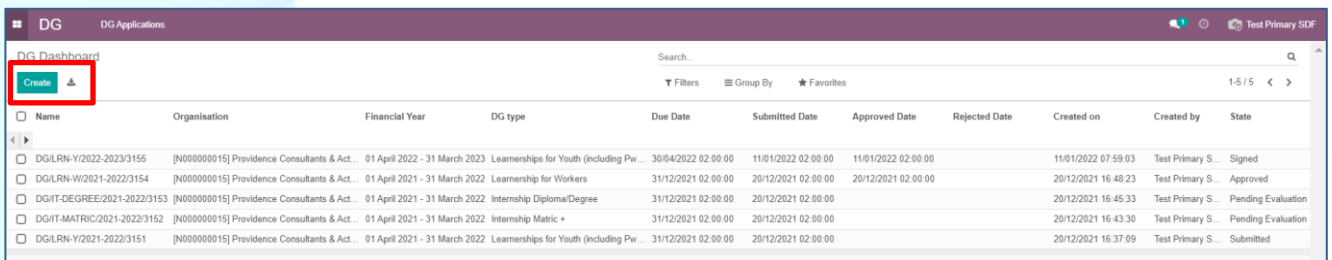


🖱️ Login as the primary SDF by entering email and password, and then click **Log In**



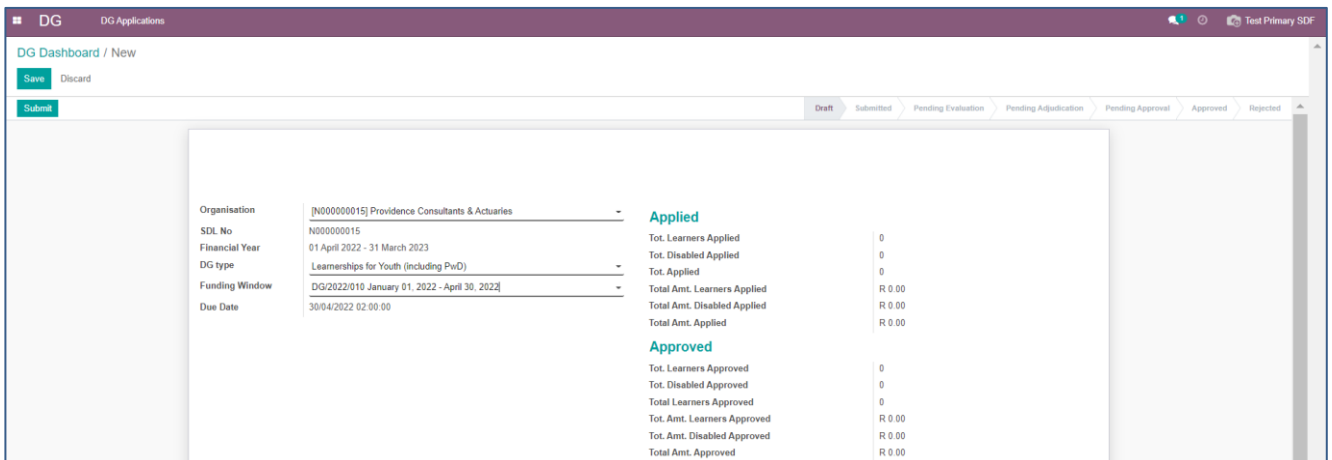
Name	Organisation	Financial Year	DG type	Due Date	Submitted Date	Approved Date	Rejected Date	Created on	Created by	State
DG/LRN-Y/2022-2023/3155	[N000000015] Providence Consultants & Act...	01 April 2022 - 31 March 2023	Leaverships for Youth (including Pw...	30/04/2022 02:00:00	11/01/2022 02:00:00	11/01/2022 02:00:00		11/01/2022 07:59:03	Test Primary S...	Signed

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



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	[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
DG/LRN-W/2021-2022/3154	[N000000015] Providence Consultants & Act...	01 April 2021 - 31 March 2022	Leaverships for Workers	31/12/2021 02:00:00	20/12/2021 02:00:00	20/12/2021 02:00:00		20/12/2021 16:48:23	Test Primary S...	Approved
DG/IT-DEGREE/2021-2022/3153	[N000000015] Providence Consultants & Act...	01 April 2021 - 31 March 2022	Internship Diploma/Degree	31/12/2021 02:00:00	20/12/2021 02:00:00			20/12/2021 16:45:33	Test Primary S...	Pending Evaluation
DG/IT-MATRIC/2021-2022/3152	[N000000015] Providence Consultants & Act...	01 April 2021 - 31 March 2022	Internship Matric +	31/12/2021 02:00:00	20/12/2021 02:00:00			20/12/2021 16:43:30	Test Primary S...	Pending Evaluation
DG/LRN-Y/2021-2022/3151	[N000000015] Providence Consultants & Act...	01 April 2021 - 31 March 2022	Leaverships for Youth (including Pw...	31/12/2021 02:00:00	20/12/2021 02:00:00			20/12/2021 16:37:09	Test Primary S...	Submitted

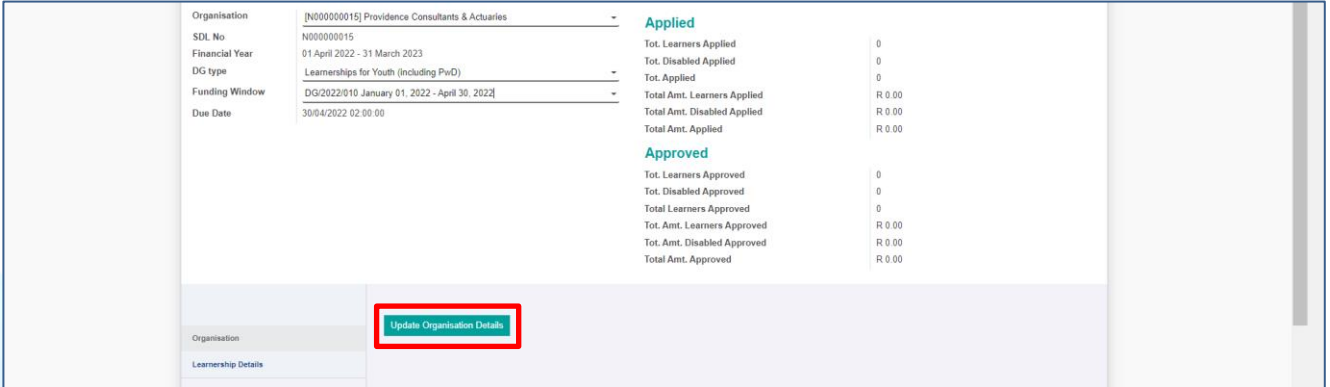
🖱️ Click **Create**



Organisation	SDL No	Financial Year	DG type	Funding Window	Due Date
[N000000015] Providence Consultants & Actuaries	N000000015	01 April 2022 - 31 March 2023	Leaverships for Youth (including PwD)	DG/2022/010 January 01, 2022 - April 30, 2022	30/04/2022 02:00:00

Applied	Approved
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
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: [N000000015] Providence Consultants & Actuaries

SDL No: N000000015

Financial Year: 01 April 2022 - 31 March 2023

DG type: Learnerships for Youth (including PuD)

Funding Window: DG/2022/010 January 01, 2022 - April 30, 2023

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

**Applied**

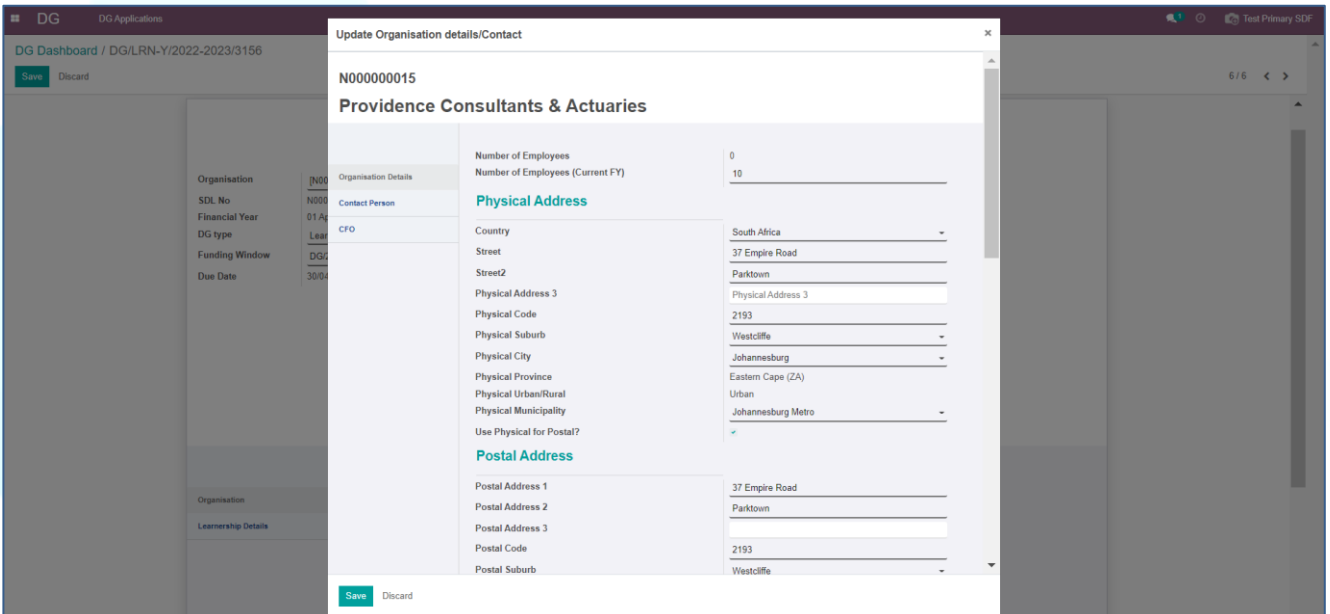
Tot. Learners Applied	0
Tot. Disabled Applied	0
Tot. Applied	0
Total Amt. Learners Applied	R 0.00
Total Amt. Disabled Applied	R 0.00
Total Amt. Applied	R 0.00

**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

Update Organisation Details

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



Update Organisation details/Contact

N000000015

Providence Consultants & Actuaries

Organisation Details

Contact Person

CFO

Physical Address

Country: South Africa

Street: 37 Empire Road

Street2: Parktown

Physical Address 3: Physical Address 3

Physical Code: 2193

Physical Suburb: Westcliff

Physical City: Johannesburg

Physical Province: Eastern Cape (ZA)

Physical Urban/Rural: Urban

Physical Municipality: Johannesburg Metro

Use Physical for Postal? ☒

Postal Address

Postal Address 1: 37 Empire Road

Postal Address 2: Parktown

Postal Address 3: Physical Address 3

Postal Code: 2193

Postal Suburb: Westcliff

Save Discard

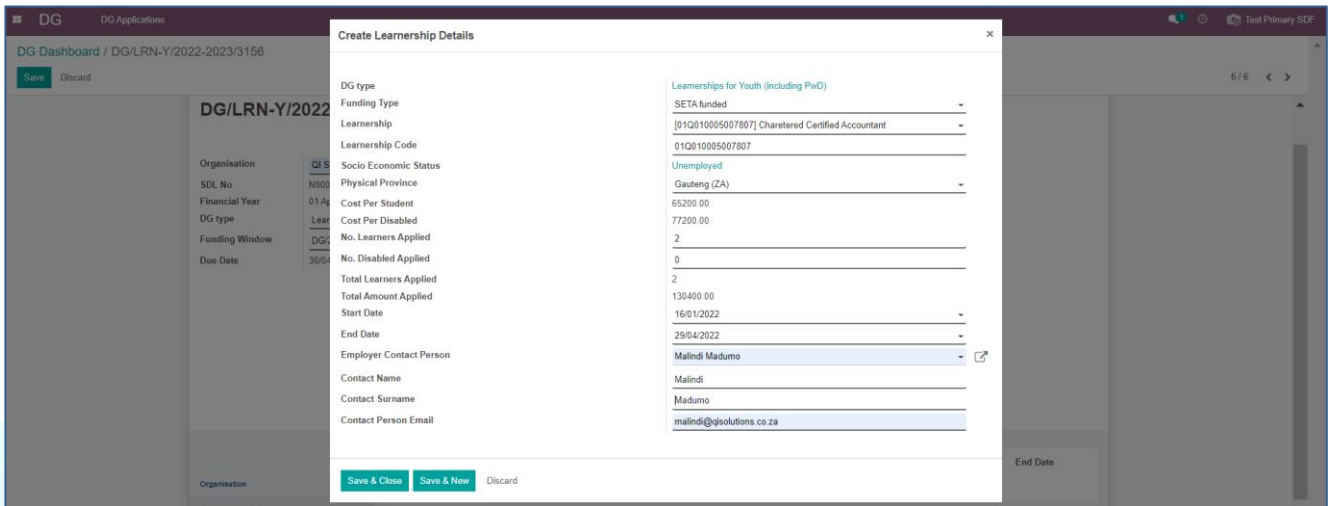
- Edit relevant fields and click **Save**



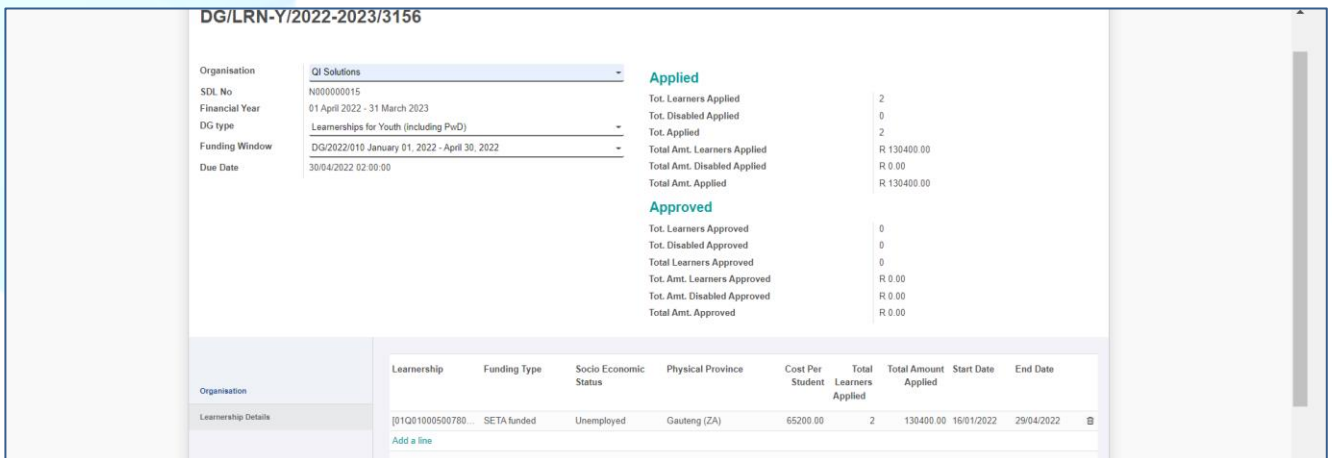
Organisation	Funding Type	Socio Economic Status	Physical Province	Cost Per Student	Total Learners Applied	Total Amount Applied	Start Date	End Date
<a href="#">Add a line</a>								

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



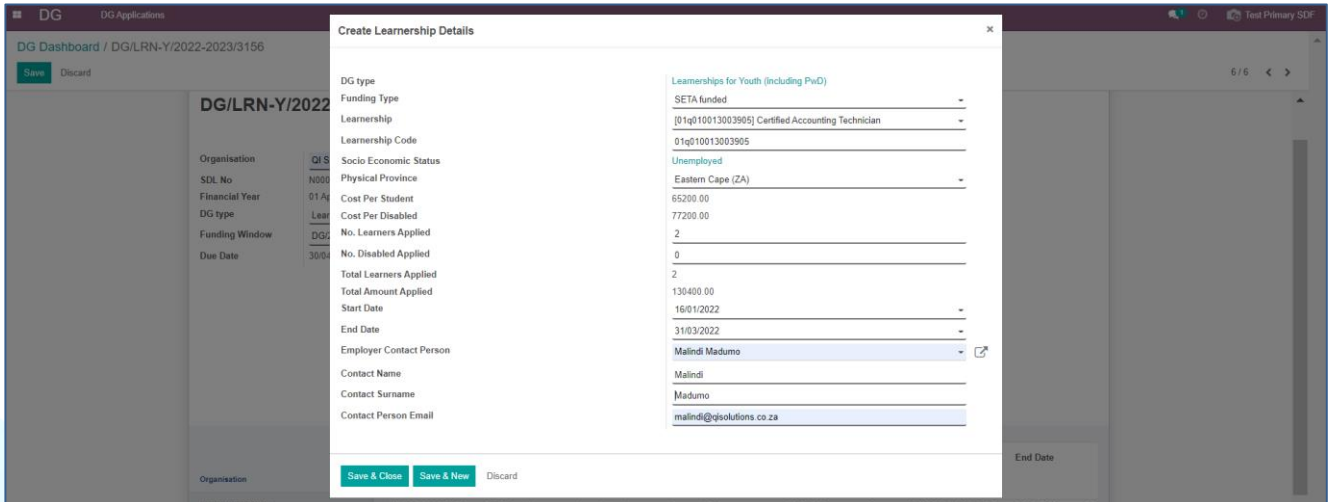


- ☞ Select Funding type
- ☞ Select Learnership (the Learnership Code is then auto populated)
- ☞ Select Physical Province
- ☞ Select no. of learners (the total amount is auto calculated)
- ☞ Select Start and end date
- ☞ Select employer contact person
- ☞ Click **Save & Close**



Organisation	Learnership	Funding Type	Socio Economic Status	Physical Province	Cost Per Student	Total Learners Applied	Total Amount Applied	Start Date	End Date
QIS	01Q010005007807	SETA funded	Unemployed	Gauteng (ZA)	65200.00	2	130400.00	16/01/2022	29/04/2022

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



**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:

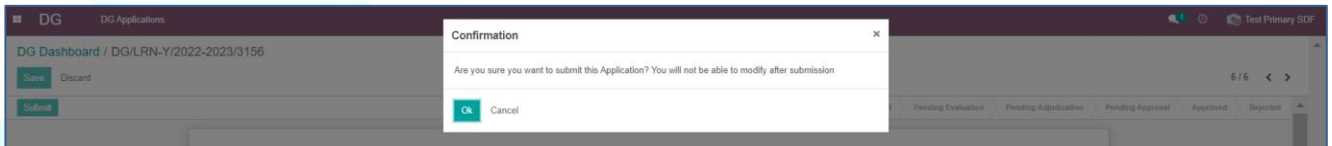
Employer Contact Person:

Contact Name:

Contact Surname:

Contact Person Email:

-  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

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



**A status notification email is sent to the employer. Another notification is sent to the INSETA for internal processing and approval.**