



inseta

**INSURANCE SECTOR EDUCATION
AND TRAINING AUTHORITY**

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

DISCRETIONARY GRANTS TRAINING GUIDE



Table of Contents

1 Introduction	3
1.1 Objective	3
2 Navigation	4
2.1 System Access.....	4
2.2 Icons and terminology	4
3 DG Application	5
3.1 Apply for a DG.....	5
Learnership for Youth (including PwD)	6
Learnership for Workers	9
Learnership for Rural Learners.....	10
Internship Matric +	12
Internship Diploma/Degree	13
Bursaries for Workers	15
Skills Programmes for Workers	16



I 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.

I.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:

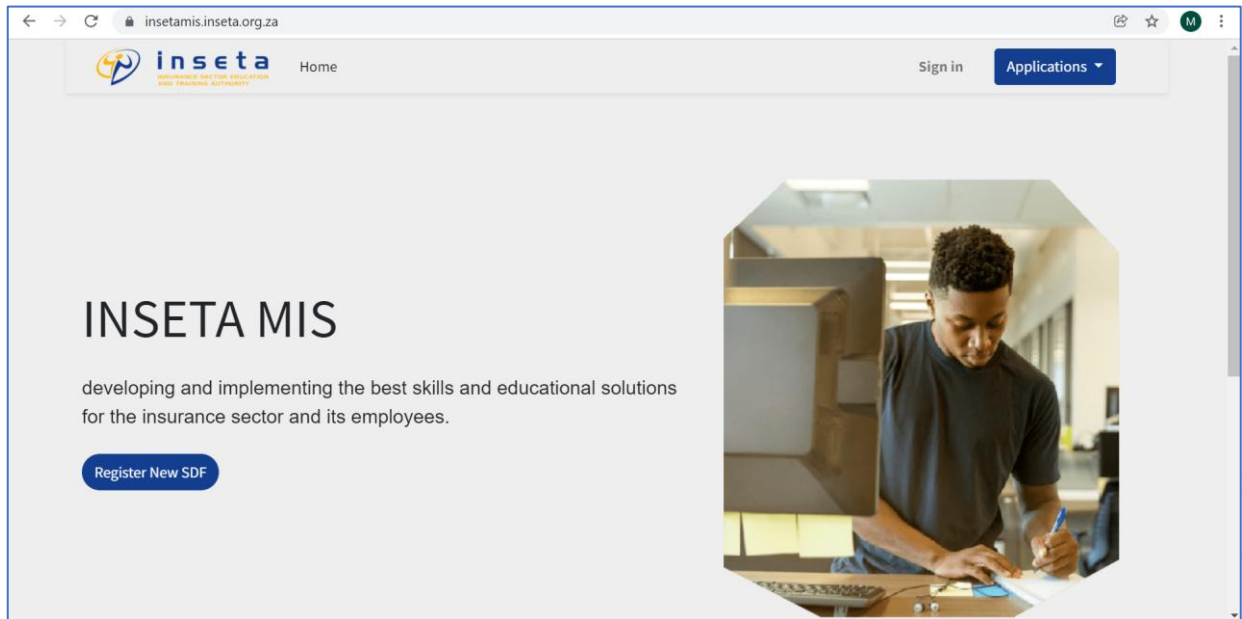
- Apply for a DG



2 Navigation



2.1 System Access

To access the DG Skills Module, follow the link <https://insetamis.inseta.org.za/>



2.2 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

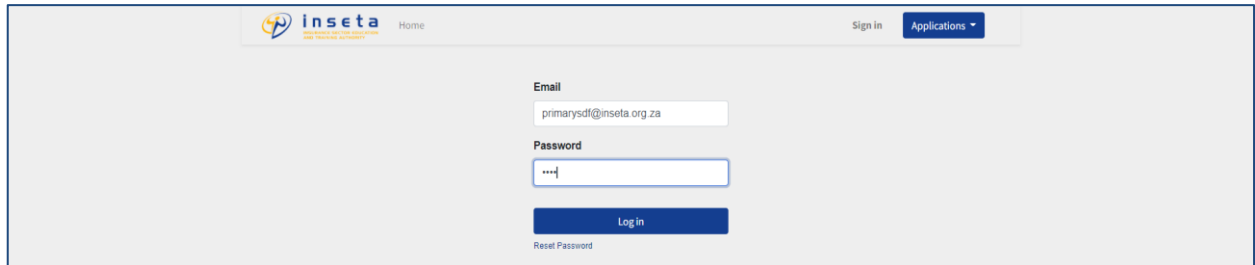
The following table includes abbreviations or notations that are used in the document and on the system.

Term/Acronym	Definition
DG	Discretionary Grants

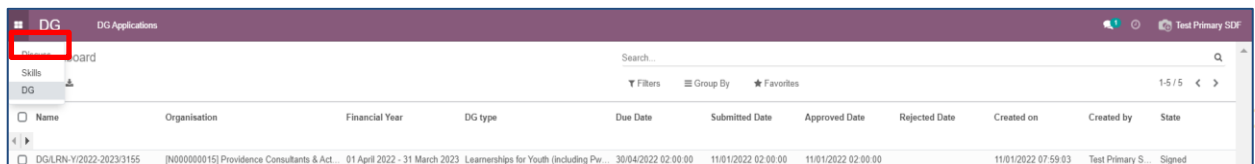
3 DG Application

Log in as the approved **primary SDF /HEI Representative**


3.1 Apply for a DG

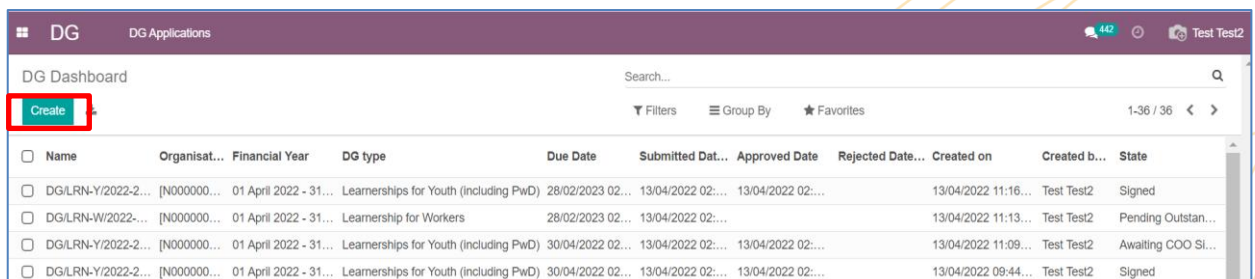


- Login as the primary SDF or HEI Representative by entering email and password, and then click **Log In**



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	Leaverships for Youth (including PwD)	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...	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
DG/LRN-W/2022-...	[N000000...	01 April 2022 - 31...	Leavership 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...	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...
DG/LRN-Y/2022-2...	[N000000...	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)

Organisation: [N00000015] Providence Consultants & Actuaries

SDL No: N000000015

Financial Year: 01 April 2022 - 31 March 2023

DG type: Learnerships for Youth (including PwD)

Funding Window: DG2022/028 January 01, 2022 - April 30, 2022

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**

Update Organisation Details

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

- Edit relevant fields and click **Save**

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**

- 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

SDL No: N00000015

Financial Year: 01 April 2022 - 31 March 2023

DG type: Leaverships for Youth (including PwD)

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

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

Applied

Tot. Learners Applied	2
Tot. Disabled Applied	0
Total Applied	2
Total Amt. Learners Applied	R 130400.00
Total Amt. Disabled Applied	R 0.00
Total Amt. Applied	R 130400.00

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

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

Financial Year: 01 April 2022 - 31 March 2023

DG type: Leaverships for Youth (including PwD)

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

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

Create Learnership Details

DG type: Leaverships for Youth (including PwD)

Funding Type: SETA funded

Learnership: [13Q130064001205] Certificate: Financial Planning Nqf L5

Learnership Code: 13Q130064001205

Socio Economic Status: Unemployed

Physical Province: Northern Cape (ZA)

Cost Per Student: 78240.00

Cost Per Disabled: 92640.00

No. Learners Applied: 5

No. Disabled Applied: 0

Total Learners Applied: 5

Total Amount Applied: 391200.00

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

End Date: 30/04/2023

Save & Close **Save & New** Discard

- 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

OK Cancel

Pending Adjudication Pending Approval Approved Rejected

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

Learnership for Workers

Organisation [N00000015] Providence Consultants & Actuaries
SDL No N00000015
Financial Year 01 April 2022 - 31 March 2023
DG type Learnership for Workers
Funding Window DG/2022/028 January 01, 2022 - April 30, 2024
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**

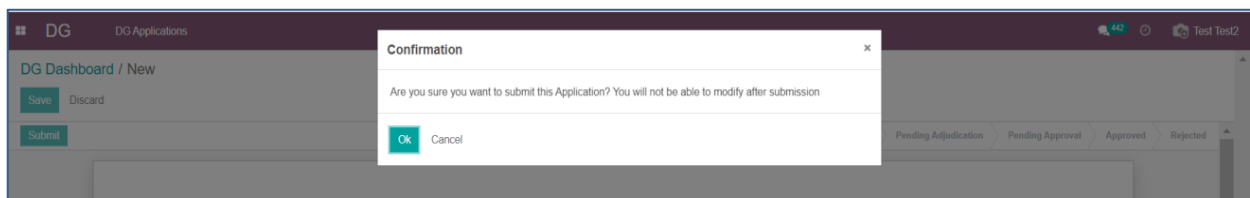
DG type Learnership for Workers
Funding Type SETA funded
Learnership [29Q290031331404] Fetc: Human Resources Management And Practic
Learnership Code 29Q290031331404
Socio Economic Status Employed
Physical Province Northern Cape (ZA)
Cost Per Student 24000.00
No. Learners Applied 5
Total Learners Applied 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	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	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, 2024
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**

- Select Funding type
- Select Learnership (the Learnership Code is then auto populated)
- Select Physical Province
- Select no. of leaners (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
	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 +

The screenshot shows the 'New' form for an Internship Matric + application. The status is 'Applied'. The summary statistics are as follows:

Category	Value
Tot. Learners Applied	0
Total Amt. Applied	R 0.00
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**

The screenshot shows the 'Internship Programme Details' section of the form. It includes a table with columns for Programme Title, Internship Type, Scarce & Critical Skill, Cost Per Student, No of Interns, Total Amount, Duration, Start Date, and End Date. An 'Add a line' button is visible below the table.

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

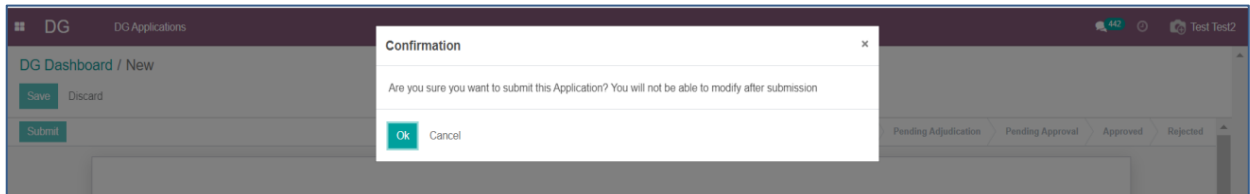
The screenshot shows the 'Create Internship Details' dialog box. The fields are filled with the following information:

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, TI
Contact Name	Thabo
Contact Surname	Manganyi
Contact Person Email	thabom@inseta.org.za

- 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
Add a line								

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

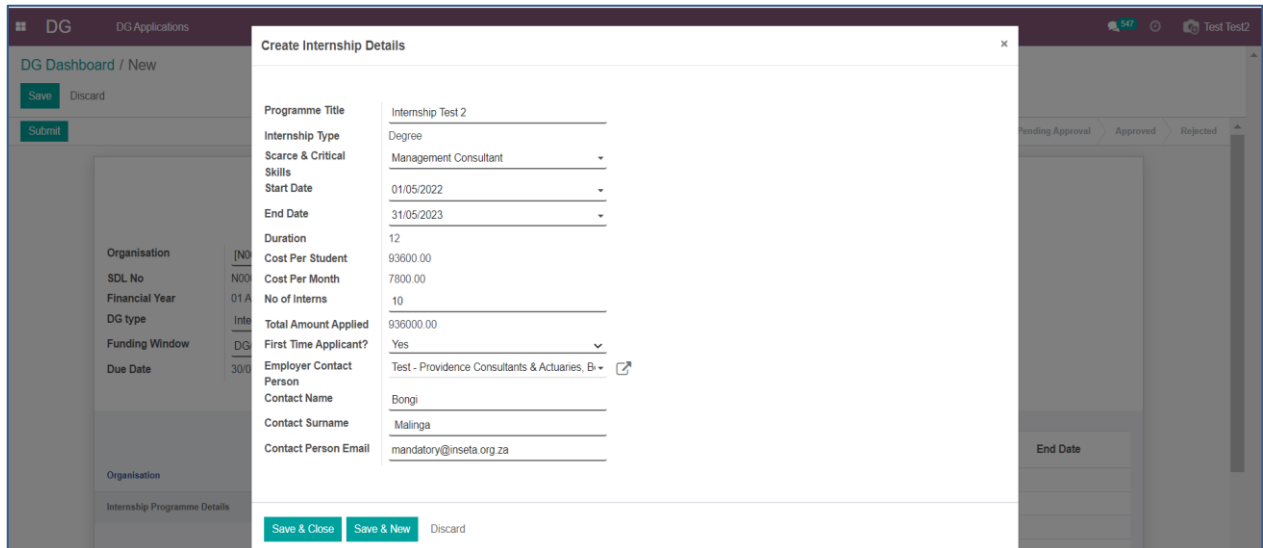


- Click **Submit**, and **OK** to confirm

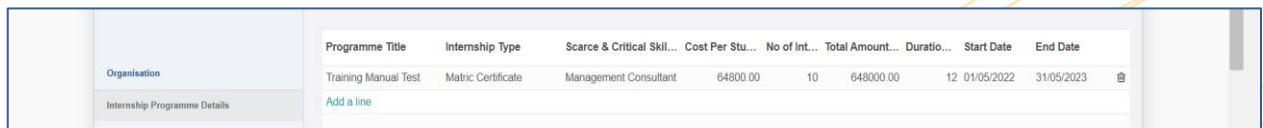
Internship Diploma/Degree

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

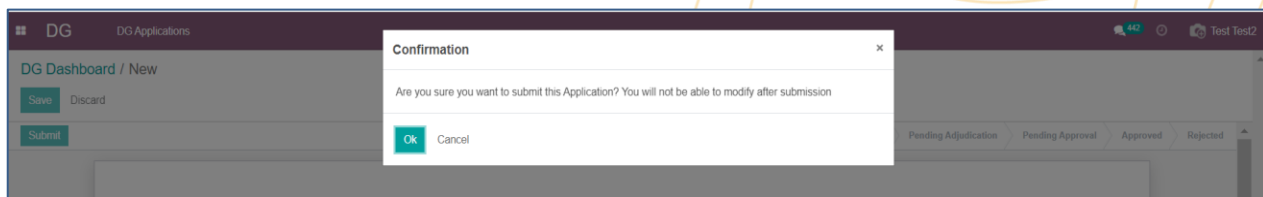
- Select **Organisation** (Only organisations linked to the SDF in the Skills module can be selected in the dropdown)
- Select **DG type** and **Funding window**
- Click **Internship Programme details** and then **Add a line**



- 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**



- 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

The screenshot shows the 'DG Applications' dashboard with a 'New' form for 'Bursaries for Workers'. The form includes the following fields and values:

Organisation	[N00000015] 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

Summary statistics:

Applied	
Tot. Learners Applied	0
Total Amt. Applied	R 0.00
Approved	
Tot. Learners Approved	0
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 **Learner details** and then **Add a line**

The screenshot shows the 'Create Bursary Details' form with the following fields and values:

Cost Per Student	36000.00
No. Learners Applied For	10
Funding Amount Required	360000.00
Total Amount Applied	360000.00
Institution	Cape Peninsula University of Technology
Qualification Title	Bachelor of Business Administration
Year of Study	1
Qualification SAQA ID	58962
Scarce & Critical Skills	Management Consultant
NQF Level	Level 05
Start Date	01/05/2022
End Date	04/05/2025

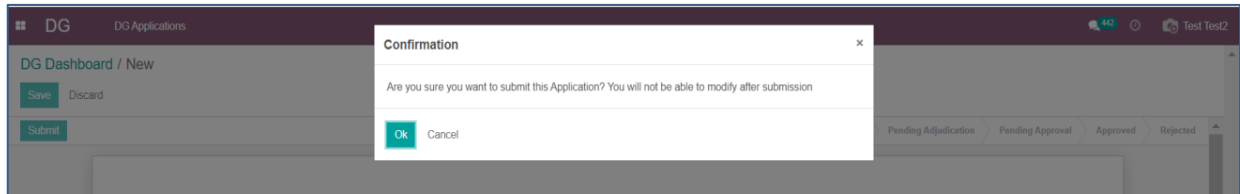
Buttons: Save & Close, Save & New, Discard.

- 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**

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 ...

[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	SDL No	Financial Year	DG type	Funding Window	Due Date
[N00000015] Providence Consultants & Actuaries	N00000015	01 April 2022 - 31 March 2023	Skills Programmes for Workers	DG/2022/028 January 01, 2022 - April 30, 2024	30/04/2022 02:00:00

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

[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 **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...	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 Application**

Notes



Please make sure you press the submit button, applications not submitted wont be eevaluated .

