



BANKSETA

Mandatory Grant Training Manual (WSS / WSP & ATR) 2019





Foreword

Dear Stakeholder

As part of the Workplace Skills Plan submission for your organisation, the information of employees such as their Identity Numbers etc. are included. BANKSETA complies with the POPI Act and ensures that information is handled in a responsible manner.

BANKSETA can therefore give you the assurance that for the collation of the information for the Sector Skills Plan, the information is consolidated and only high-level data goes to the Department of Higher Education and Training (DHET). All published data is in a consolidated form and no individual information is published.

1. INTRODUCTION / OVERVIEW	3
2. REGISTRATION AS A SKILLS DEVELOPMENT FACILITATOR.....	4
3. LINK ORGANISATION TO SDF PROFILE	7
4. UPDATING / CAPTURING A NEW ORGANISATION.....	10
5. CREATING THE PLAN.....	16
6. COMPILE WORKPLACE SKILLS SURVEY / PLAN (WSS / WSP)	18
6.1 SMALL ORGANISATIONS (1 – 49).....	18
6.2 MEDIUM (50 – 149) / LARGE ORGANISATIONS (150+).....	22
7. COMPILE AN ANNUAL TRAINING REPORT (ATR).....	33
7.1 SMALL ORGANISATIONS (1 – 49).....	33
7.2 MEDIUM (50 – 149) / LARGE ORGANISATIONS (150+).....	34
8. SUBMISSION.....	39

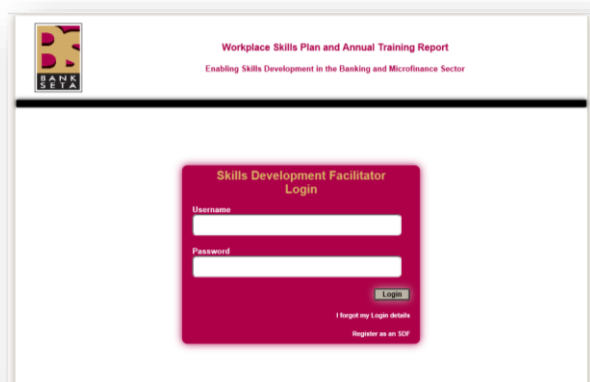
1. INTRODUCTION / OVERVIEW

The **Workplace Skills Plan (WSP)** is a strategic document that articulates how the employer is going to address the training and development needs of the workplace.

The **Annual Training Report (ATR)** is a deliberate document that expresses how the employer has addressed the training and development needs of the workplace for the previous year.

For the SDF of your organisation to complete the WSP / ATR report please Login using the following address: www.banksetamisi.co.za

Below the SDF will find a comprehensive screen by screen user manual guiding you through all the steps to register, login and complete the Workplace Skills Plan and Annual Training Report for their specific organisation.



A Skills Development Facilitator (SDF) is a person who “Analyses the skills requirements within an organisation and coordinates the execution of the personal development plans of employees, monitors the implementation of the workplace skills plan and reports accordingly”

Above the User will find the main Login screen of the **Skills Development Facilitator (SDF)**. Here the SDF can Login to the system if he / she has already registered, or he / she may proceed with the registration process, to receive access to the WSS / WSP / ATR report.

1. If you have not gone through the registration process, proceed by clicking on **Register as an SDF** and complete the SDF application form on the system.
2. If you already have already completed the registration process and have your Username and Password completed the information above and proceed by clicking on the **LOGIN** tab.

NOTE: The system screenshots that appear throughout this document is for illustration purposes ONLY and do not reflect the actual dates.

2. REGISTRATION AS A SKILLS DEVELOPMENT FACILITATOR

2.1 PERSONAL DETAILS

For the SDF to register, they need to read through the first page before completing the menu items on the left side of the page. Click on **NEXT** to begin with the registration process.

Each section will have to be completed in full. Dropdown boxes have been added for the SDF's convenience, and where applicable, a selection has to be made from the given.

Above is the registration form where the SDF will start by completing his / her Personal Details.

On the left of the form is a list of menu items of all the sections that will have to be completed:

- Personal Details
- Contact Details
- Other Details

- Account Details

At the bottom of the above page the SDF will find the **NEXT** tab, once he / she has completed all of the Personal Details information, proceed to click on **NEXT** to take you to the **Contact Details** page.

Once the SDF clicks on **CANCEL REGISTRATION**, this will cancel the process and take you back to the main **LOGIN** screen.

2.2 CONTACT DETAILS

Workplace Skills Plan and Annual Training Report
Enabling Skills Development in the Banking and Microfinance Sector

Skills Development Facilitator - Registration Form

Personal Details ☒ **Contact Details**

E-mail Address *
[anusha@remolenet.net]

Cell number *
[0729281832]

Telephone number *
[0879804701]

Fax number *
[0879804702]

Physical Address *
[272 Kruger Avenue]
[Lyttelton Manor]
[Centurion]
[0157]

Postal Address *
[P O Bos 2888]
[The Reeds]
[Centurion]
[0158]

Province *
Gauteng

Municipality *
City of Tshwane Metropo...

Copy to Postal Address

Back Next

Cancel Registration

Province dropdown options:
Western Cape
Eastern Cape
Northern Cape
Free State
Kwazulu/Natal
North West
Gauteng
Mpumalanga
Limpopo
City of Tshwane Metropo...

Municipality dropdown options:
Gauteng
City of Johannesburg Metropolitan Municipality
City of Tshwane Metropolitan Municipality
Ekurhuleni Metropolitan Municipality
Emfuleni Local Municipality
Lesedi Local Municipality
Merafong City Local Municipality
Midvaal Local Municipality
Mogale City Local Municipality
Randfontein Local Municipality
Sedibeng District Municipality
West Rand District Municipality
Westonaria Local Municipality

Above is the Contact Details form that has to be completed. On the left of the form the SDF will find the menu items, where the Personal Details is now marked with a green tick denoting that this section is now complete.


Proceed by completing all required contact details and to save your entry click on **Next**.

At the bottom of each form under the registration section the SDF will find the **Cancel** Registration tab. Once this tab is clicked, the registration process will be cancelled.

To go to the previous page the SDF can click on **BACK**.

Proceed by clicking on **NEXT** to proceed to the **Other Details** page.

2.3 OTHER DETAILS



Workplace Skills Plan and Annual Training Report
Enabling Skills Development in the Banking and Microfinance Sector

Search for School

Province: Search

School Name	Gender	Phase	Province	Town/City	Status
Nedreduke Primary School	Public	Combined	Northern	Northern	Known
... (rows omitted) ...					

Skills Development Facilitator - Registration Form

Personal Details ☒ **Contact Details** ☒

Content Details ☒ **Other Details** ☐ **Account Details** ☐

High School attended*

Last Year you attended the school*

☒ I have selected my last school attended.
☐ Unable to find the last school attended, last school attended was in South Africa.
☐ Unable to find the last school attended, last school attended was not in South Africa.

Highest Education*

8 Matric Description

Current Occupation*

Number of years in current Occupation*

Have you completed an SDF Training Programme provided by an accredited training provider*?
☒ Yes
☐ No

Name of the Accredited Provider*

General Comments

Do you intend us to use your details in respect with the POPI Act (Act No. 4 of 2012).*

☒ Yes
☐ No

Below Senior Certificate

[Senior Certificate](#)

Further Education and Training Certificate

Advanced Certificate

Apprenticeship / Trade Certificate

Diploma

Further Diploma

Advanced Diploma

Degree

Honours

Masters

Unknown

Above the SDF will have to complete the Other Details form with the required information.

For the Last High School Attended, the SDF should proceed by clicking on **SEARCH**, this will bring up the Search for School page, where the SDF can now type in the name of the last high school attended and click on **SEARCH**.

Once the Search tab is clicked as shown above, the built in programme will look up the name of the school in a list form.

To select a specific school from the list the SDF can proceed by clicking on **SELECT**. Once the select tab is clicked, the school name will be populated on the Other Details Form in the Last High School Attended section.

Once the details of the High School have been inserted, the SDF can proceed by completing all other information within the form. Once the SDF has completed all of the above, he has only one more step to complete his registration process.

The last section to be completed is the **Account Details** section.

Proceed by clicking on **NEXT**.

2.4 ACCOUNT DETAILS

The screenshot shows the 'Skills Development Facilitator - Registration Form' completion page. The header includes the BANK SETA logo and the text 'Workplace Skills Plan and Annual Training Report' and 'Enabling Skills Development in the Banking and Microfinance Sector'. The main content area is titled 'Skills Development Facilitator - Registration Form' and shows a 'Registration Completed Successfully' message. On the left, there are four sections: 'Personal Details', 'Contact Details', 'Other Details', and 'Account Details', each with a green checkmark indicating completion. The main text area contains a thank you message, instructions to link the profile to an organization, and login details (Username: 8002210180087, Password: *****). A 'Continue' button is visible at the bottom right.

The registration process has been completed and the SDF has clicked on Register as shown above, the system notification tells the SDF that the registration process has been Completed Successfully.

On the left of the form above the SDF can clearly see all completed section have been marked with a green tick.

The SDF registration is now complete and the system has automatically generated an e-mail to the SDF, informing him / her that his / her account has been created successfully.

The SDF can now log into the BANKSETA WSP / ATR online module and complete the self-same form for his / her organisation.

The screenshot shows an email confirmation message. It starts with 'Dear Anusha Bajjnath' and 'Thank you for registering as a Skills Development Facilitator at BANKSETA.' It confirms that the account and profile were created successfully. It then instructs the user to link their profile to an organization and provides login details: Username: 8002210180087 and Password: *****. It ends with 'Kind Regards' and a note to not reply to the message.

Should you not complete the registration process and receive confirmation thereof, you will have to redo this section.

3. LINK ORGANISATION TO SDF PROFILE

The screenshot shows the 'Organisations linked to My Profile' page. The header includes the BANK SETA logo and the text 'Workplace Skills Plan and Annual Training Report' and 'Enabling Skills Development in the Banking and Microfinance Sector'. The main content area is titled 'Organisations linked to My Profile' and shows a message: 'There are no Organisations linked to your profile. Please click Link Organisation on the menu to start the linking process.' There is a 'Search' button and a table with columns 'Trade Name', 'SDL Number', and 'Status'.

Once the registration process has been completed and the SDF logs back into the system the page / menu above will appear. The SDF now has the following options:

- Link an organisation to his / her profile.
- Add a new organisation to his / her profile.

To proceed click on **Link Organisation** under the Menu.

The screenshot shows the top navigation bar with 'Home', 'WSP and ATR Submissions', 'My Profile', and 'Logout'. Below this is a 'Menu' sidebar with 'Link Organisation' highlighted by a red circle. The main content area is titled 'Organisations linked to My Profile' and contains a message: 'There are no Organisations linked to your profile. Please click Link Organisation on the menu to start the linking process.' Below the message is a search bar with a 'Search' button and a table with columns 'Trade Name', 'SDL Number', and 'Status'.

The screenshot shows the 'Link Organisation to my Profile' form. It includes a 'Please note' section with instructions: 'Enter a valid SDL Number to link to your Profile', 'Upload a signed confirmation letter from the Organisation by an executive officer stating that you are the selected SDF for the Organisation', 'The system will only accept Word/PDF documents only', and 'If you enter a valid SDL Number and the system states that the Organisation was not found on the system, then proceed to add the Organisation onto the system.' The form fields are: 'SDL Number' (text input with value '123456789'), 'Company Name' (text input with value 'Quick Loans PTY'), 'Company Size' (dropdown menu with value 'Small Company (1 to 49)'), 'Company is a Subsidiary' (dropdown menu with value 'No'), 'Confirmation Letter' (file upload button with 'Browse...' text), and 'SDF Function' (dropdown menu with values 'Primary SDF' and 'Secondary SDF'). A 'Link' button is at the bottom right, and a 'Cancel' link is at the bottom left.

The SDF must complete the form above, using the SDL Number of the organisation. When the SDF enters the SDL number the system pulls through some of the information such as the Company Name and Company Size (Small Company 1 - 49, Medium Company 50 - 149, Large Company 150+ employees).

The SDF can browse for the Confirmation Letter that confirms that the Company is a Subsidiary of a larger organisation or that it is not. Whatever the case, the company needs to state such on a Company Letterhead and this letter needs to be uploaded via the browse function. The SDF completes this section by selecting the Primary or Secondary SDF function. Click on the **LINK** Tab.

Workplace Skills Plan and Annual Training Report
Enabling Skills Development in the Banking and Microfinance Sector

Home WSP and ATR Submissions My Profile Logout

Menu
Link Organisation
Add New Organisation

Organisations linked to My Profile

Search

Trade Name	SDL Number	Status
Quick Loans PTY	L123456789	Access request sent to BANKSETA for approval

Open

Message from the System

The organisation has been linked to your profile successfully. Please note that you will receive an e-mail once your access request has been approved/rejected.

OK

If the system notification appears, this means that the organisation exists on the system. The SDF must proceed by completing the organisation details into the system.

Dear Anusha Baijnath

You have successfully linked the following Organisation to your profile.

Quick Loans PTY - L123456789

Your details have been submitted to BANKSETA who will verify your details and furthermore confirm that you are the appointed SDF to complete a WSP/ATR for the Organisation.

Once this verification and confirmation process is successful, you will be notified by email and you will be afforded access to the WSP and ATR forms for the Organisation.

Kind Regards

Kindly do not reply to this message as this is an unattended mailbox.

Once the SDF has linked an organisation, the SDF will see the Organisations linked to their profile.

Workplace Skills Plan and Annual Training Report
Enabling Skills Development in the Banking and Microfinance Sector

Home WSP and ATR Submissions My Profile Logout

Menu
Link Organisation
Add New Organisation

Organisations linked to My Profile

Search

Trade Name	SDL Number	Status
Quick Loans PTY	L123456789	Access Granted

Open

Click on **OPEN** to view the Organisation. Above the SDF can clearly see that the selected organisation has been successfully linked to his / her profile. The SDF will now have to wait for BANKSETA to grant access to continue with the completion of the WSP / ATR Plan. If access has been granted, the status will change.

Once BANK SETA approves the SDF for the selected organisation, the system status will then read **ACCESS GRANTED** as per the screen above.

The screenshot shows a web application interface for an SDF (Special Development Function) profile. On the left is a dark sidebar menu with options: Home, Organisation Details, Organisation Contact, Bank Details, Financial Director, Training Committee Details, Secondary SDF, Subsidary Organisation(s), and Exit Organisation. The main content area displays the following information:

SDL Number	L123456789	Trade Name	Quick Loans PTY
SDF	Madeleine Pelzer		
SDF Functions	Primary SDF		
Confirmation letter	Open file		
Status	Access Granted		
Date Applied for access	22 March 2017 11:08		
Date Access Granted	-		
Approved By			

Below this, there is a section titled "List of Levies paid by SARS to BANKSETA" followed by a table with headers: Transaction Date, Year, Mandatory, Levy portion paid to SETA, and Mandatory Grant Criteria Met.

The SDF can now start completing the Menu Items on the left.

Above the SDF can now view the following information:

- The SDL Number of the organisation
- Trade name of the organisation
- The name of the primary SDF
- Function of the SDF
- Confirmation Letter which can be viewed
- Status of the SDF linkage to the organisation
- Date application was made for access

From the above screen the SDF will also be able to view all previous levies that was received by BANKSETA by the specific organisation.

Also included on the above screen is a new MENU, which the SDF can utilise to edit and update all the organisational details of the organisation that he/she is linked too.

***** The SDF is to note, if he / she is capturing a brand new organisation that is not included in the database, the following steps will have to be followed.***

4. UPDATING / CAPTURING A NEW ORGANISATION

If the SDF finds that the system did not find his selected organisation, he/she should proceed by clicking on **ADD NEW ORGANISATION**, and proceed to capture the details of the organisation on the plan.

Small Company (1 to 49 employees)
Medium Company (50 to 149 employees)
Large Company (150 + employees)

81110 - Monetary Intermediation
81121 - Discount Houses; Commercial & Other Banking
81122 - Building Society Activities
81900 - Other Financial Intermediation NEC
81910 - Lease Financing
83101 - Securities Dealing
83102 - Activities ancillary to Financial Mediation
99902 - Micro Financing
Other

BANKSETA
CHIETA
CTFL SETA
CETA
ETDP SETA
ESETA
FASSET
FIETA
LG SETA
RgnSETA
CATHSETA

Click on **NEXT** to save and complete this section.

4.1 ORGANISATION DETAILS

SDF will have to link the SETA that the organisation belongs to. Make selection from the dropdown provided.

Above under the MENU, the SDF can commence with the Organisation Details and proceed down the menu making sure that all details have been captured and completed in full.

Proceed by clicking on **Organisation Details** under the menu. Most of the information pulls through onto the system already. Click on **UPDATE** to complete this section. Once this is done, a system message will be displayed informing the SDF that the organisation details have been updated successfully. Click on **OK** to proceed.

Subsidiary: a company controlled by a holding company.

Here the system is asking the SDF if the organisation that he / she is linked to, is linked to a Holding Company (Parent Company).

If the SDF selects **YES**, proceed to complete the SDL number of the holding company, but if the SDF selects **NO**, the SDL number for the holding company can be left blank as this is not a compulsory section.

SDF to click on **UPDATE** to save the information that has been captured.

Proceed by clicking on **Organisation Contact** under the menu.

4.2 ORGANISATION CONTACT

Below the SDF is completing the Contact Details of the organisation for which he / she will be completing the BANKSETA WSP / ATR Plan.

The screenshot shows a web application interface for the BANKSETA WSP / ATR Plan. The 'Organisation Contact' form is displayed, with a left-hand menu containing options like 'Home', 'WSP and ATR Submissions', 'My Profile', and 'Logout'. The form fields include: 'SDL Number' (L123456789), 'Trade Name' (Quick Loans PTY), 'Company Telephone Number' (082 123 4567), 'Contact Person Name' (John), 'Contact Person Email Address' (john@quickloans.co.za), 'Contact Person Phone Number' (011 123 1111), 'Contact Person Cell Number' (082 123 4567), 'Physical Address' (111 Small street), 'Postal Address' (PO Box 10104), 'Municipality' (City of Tshwane Metro), and 'Country Code' (South Africa). A red asterisk (*) indicates compulsory fields. An 'Update' button is located at the bottom right of the form.

The above will have to include the following contact information of the Organisation:

- Telephone and Cell Numbers
- Contact person at the organisation
- Both physical and postal details
- Province details
- As well as the municipality that the organisation falls under.

The SDF is to note that all compulsory fields are marked with a red * and has to be completed.

Once all of the above information has been completed, click on **UPDATE** to save the information.

After each completed section the system notification will appear informing the SDF that the details have been saved successfully. Click on **OK** to proceed.

Click on **Bank Details** under the menu to proceed.

4.3 BANK DETAILS

Under the Banking Details this is a read only section where the information will be pulled t by the delegated BANK SETA staff on the main MIS using the proof of banking details supplied by the SDF at the end of the WSP / ATR.

Home WSP and ATR Submissions My Profile Logout

Menu

Home

Organisation Details

Organisation Contact

Bank Details

Financial Director

Training Committee Details

Secondary SDF

Subsidary Organisation(s)

Exit Organisation

Bank Details

Bank Name Alpha Bank Limited

Account Number 1234567890

Account Type Business Account

Branch Code 432005

Account Holder Name Quick Loans PTY

Proof of Bank details

Click here to view document

Browse... Submit File

Change

If the organisation had previously submitted a WSP / ATR this information would have automatically been populated. The SDF will be able to view the banking details information and cannot edit the first page.

Home WSP and ATR Submissions My Profile Logout

Menu

Home

Organisation Details

Organisation Contact

Bank Details

Financial Director

Training Committee Details

Secondary SDF

Subsidary Organisation(s)

Exit Organisation

Bank Details change

Please note: Changing banking details will require proof of banking details to be submitted and the banking details will need to be approved by BANKSETA.

Bank Name

Account Number

Account Type

Branch Code

Account Holder Name

Cancel change

Update

When clicking on **CHANGE** on the previous screen, the system takes you to the 2nd page for the Banking Details that allows the SDF to change the Banking Details and **UPDATE**. Once this is done the system message will request that you upload the proof of banking details and accept the **CHANGE**. The banking details however needs to be verified by BANKSETA with the supporting evidence of the proof of banking details.

To proceed to the next section click on **CFO / Financial Director** under the menu.

4.4 CFO / FINANCIAL DIRECTOR

Below the SDF will have to complete the Chief Financial Officer's details of the specific organisation.

The screenshot shows the 'Financial Director' form. The left sidebar contains a menu with options: Home, Organisation Details, Organisation Contact, Bank Details, Financial Director (selected), Training Committee Details, Secondary SDF, Subsidiary Organisation(s), and Exit Organisation. The main form area has fields for SCL Number (L123456789), Trade Name (Quick Loans PTY), Title (dropdown), First Name (James), Last Name (Dean), E-mail Address (james@quickloans.net), Cell Number (0749439169), and Phone Number (0879804701). An 'Update' button is at the bottom right.

Once all the information is completed in full, click on **UPDATE** to save the information.

Once the SDF clicks on **UPDATE**, the system notification appears informing him that all information has been saved successfully. Click **OK** to proceed.

Proceed to **Training Committee** section under the menu items.

4.5 TRAINING COMMITTEE

The SDF can under the Training Committee page see the listed members of the committee. This information can be edited or deleted, by using the tabs on the right of the above screen.

The screenshot shows the 'List of all the Training Committee Members' page. It features an 'Add' button and a table with columns: Title, First Name, Last Name, E-mail Address, Cell Number, Phone Number, Designation, Edit, and Del. The table contains three rows of member data.

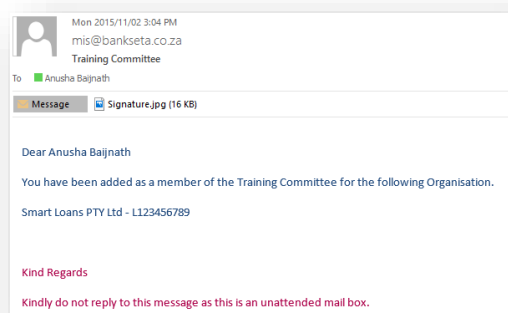
Title	First Name	Last Name	E-mail Address	Cell Number	Phone Number	Designation	Edit	Del
Mrs	Marian	Peters	mp@quickloans.net	072081632	072081632	HR Executive: Employer Representative	Edit	Del
Mr	James	Dean	james@quickloans.net	0749439169	0749439169	EE Consultant: Employer Representative	Edit	Del
Mr	Dean	Henry	dean@quickloans.net	0799162378	0799162378	HR Executive: Employer Representative	Edit	Del
Mrs	Mercia	April	mercia@quickloans.net	0156295478	0156295478	Training Manager: Employer Representative	Edit	Del

Above in the training committee main page the SDF is able to view the list of already added training committee members. You can edit the information or delete a committee member.

To add a new member to the list, click on **ADD**, and proceed then by inserting the member's details on the Add Training Committee Member page.

Once all information has been added, click on **SAVE**.

Below is a sample email.



Once a Training Committee Member is captured on the system, an email is sent out to him / her informing him / her that he / she has been added to the training committee for the specific organisation.

Proceed by clicking on **Secondary SDF's** under the menu items.

4.6 SECONDARY SDF's

Title	First Name	Last Name	E-mail Address	Status

Above the primary SDF can view the Secondary SDF's main page.

Every time that a new SDF registers onto the online WSP / ATR system and links himself / herself to this specific organisation, their name will appear under the above list.

Proceed now to the **Subsidiary Companies** section.

4.7 SUBSIDIARY ORGANISATIONS

Trade Name	SDL Number	SIC Code	Company Registration Number
Quick Loans PTY	L123456789		

Above the SDF will find the Subsidiary Organisation page.

If the SDF is loading / capturing a Holding company, and the subsidiary companies are listed against the specific holding company, the list will appear on the above page.

Once the above is completed, the SDF can then click on **Exit Organisation**, as all the organisational details have now been captured.

5. CREATING THE PLAN

Trade Name	SDL Number	SDF Function	
Quick Loans PTY	L123456789	Primary SDF	Open

Once the SDF clicks on Exit Organisation, the system will take you to the above page. Here the SDF can proceed by clicking on **OPEN**.

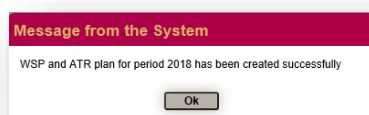
Year	Reference	Trade Name	SDL Number	Submitted	Date Submitted	
2017	L123456789-18	Quick Loans PTY	L123456789	False		open

That will take the SDF to the above page where the system gives him/her the following:

- The current Active WSP / ATR Period
- Closing date for the current WSP / ATR

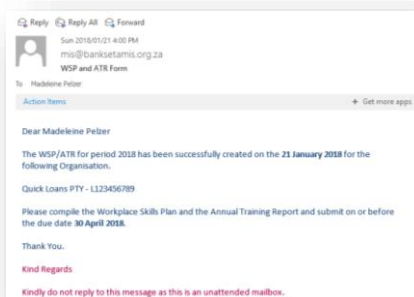
Above the SDF can view the instruction in red included in the page above, to proceed click on **HERE**, the system will create all forms that are included with the plan that has to be completed.

System notification informs the SDF that the plan has been created successfully, click OK.



To proceed to the WSP / ATR plan proceed then by clicking on **OPEN**.

Once the system creates the forms included within the WSP / ATR an email notification will be sent to the SDF informing him / her that the pan has been created successfully.



The Organisations Name and the SDL Number is included within the email.

Also included is instructions to proceed with the compilation of the WSP / ATR plan and submission must be done on or by 30 April annually.

6. COMPILE WORKPLACE SKILLS SURVEY / PLAN (WSS / WSP)

6.1 SMALL ORGANISATIONS (1 – 49)

The screenshot shows a web application interface for 'WSP and ATR Submissions'. On the left is a sidebar menu with options: Home, WSP and ATR Submissions, My Profile, and Logout. The main content area is titled 'Contents Page' and lists several sections: 'Workplace Skills Survey', 'A. Employee Profile', 'A1. Hard To Fill Vacancies', 'A2. Skills Gap', 'Annual Training Report', 'B1. Annual Training Report', and 'Documents'. Below this, there is a 'Period' section showing 'Workplace Skills Plan' for '1 January 2018 - 31 December 2018' and 'Annual Training Report' for '1 January 2017 - 31 December 2017'. At the bottom, there is a 'Submitted' status, a 'Completed Sections' indicator showing '0 OF 8', and a 'Closing Date' of '30 April 2018' with '88 Days Left'.

The SDF will notice that the WSP looks much different. There are now only a few forms to complete. This is called the Workplace Skills Survey, herein referred to as WSS.

On the left side of the page the SDF can view the following:

- The Organisations Trade Name
- Levy Number
- System Generated Reference Number
- The Period of the Report
- WSP Date Period
- ATR Date Period
- Submitted
- Completed Forms
- Closing Dates
- Day's left to submit


All of the above gives the SDF a clear indication of always knowing which organisation he / she is working with, in which period he / she is in, with the closing dates and the number of days left to submit.

To proceed from here the SDF can click on each line item on the contents page, this will activate the field and the form will be generated.

For the WSS / ATR to be submitted, each section needs to be marked as completed.

6.1.1 EMPLOYEE PROFILE (FORM A)

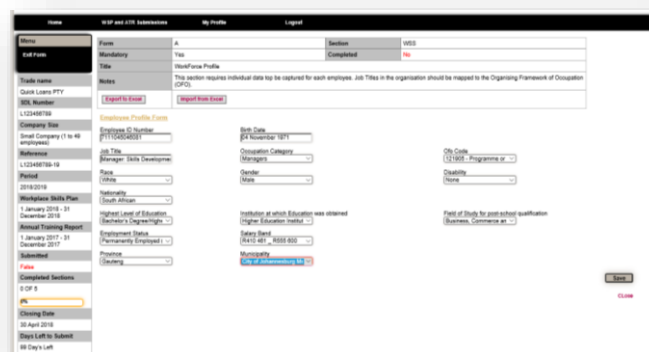
This section requires individual data to be captured for each employee. Job Titles in the organisation should be mapped to the Organising Framework of Occupation (OFO).



On the top of each form created within the WSS plan the SDF will be able to view the following details:

- The form section number
- Form section type
- Is the section mandatory
- Completed status
- Title of the form
- Notes for the content within the specific form.

The SDF can export the WSS Form “A” Template and after completion import it to the MIS. Click on **ADD** to manually insert the data on the MIS.



After inserting all the information, click on **SAVE**.

The screenshot shows the WSS Form A1 interface. On the left is a sidebar with navigation options like 'Menu', 'Edit Form', 'Trade name', 'Quick Leave PTY', 'SDF Number', 'Company Size', 'Reference', 'Period', 'Workplace Skills Plan', 'Annual Training Report', 'Submitted', 'Completed Sections', 'Closing Date', and 'Days Left to Submit'. The main area displays a table of employee data. The table has columns for ID number, Job Title, Cite Code, Race, Gender, Disability, Nationality, Date of Birth, Education Level, Institution, Employment Status, Province, Municipality, Salary Band, and two action buttons: 'Edit' and 'Delete'. A red circle highlights the 'Edit' and 'Delete' buttons for the employee with ID number 1110427988.

ID number	Job Title	Cite Code	Race	Gender	Disability	Nationality	Date of Birth	Education Level	Institution	Employment Status	Province	Municipality	Salary Band	Edit	Delete
1110427988	Director	242201	Coloured	Female	Right jawen with jawen	South African	04 Nov 1971	Doctorate / PhD	Higher Education Institution	Permanently Employed (Full-time)	Western Cape	City of Cape Town Metropolitan Municipality	R410 400 R200 000	Edit	Delete

6.1.2 HARD TO FILL VACANCIES (FORM A1)

A Hard-To-Fill Vacancy (HTFV) refers to an occupation in your organisation that takes longer than 6 months to find a suitably experienced and qualified candidate.

The screenshot shows the WSS Form A1 interface with the 'Hard To Fill Vacancy' section selected. The form displays the following details:

- Form section number:** A1
- Form section type:** Vac
- Is the section mandatory:** Yes
- Completed status:** No
- Title of the form:** Hard To Fill Vacancies
- Notes:** A Hard To Fill Vacancy (HTFV) refers to an occupation in your organisation that takes longer than 6 months to find a suitably experienced and qualified candidate.

On the top of each form created within the WSS plan the SDF will be able to view the following details:

- The form section number
- Form section type
- Is the section mandatory
- Completed status
- Title of the form
- Notes for the content within the specific form.

This information can be edited or deleted, by using the tabs on the right of the above screen. Once finished, **MARK SECTION COMPLETE.**

The SDF can export the WSS Form “A1” Template and after completion import it to the MIS. Click on **ADD** to manually insert the data on the MIS.

Form	A1	Section	WSS
Mandatory	Yes	Completed	No

Occupation	Province	Reason	Add	Del
121212 Sales Manager	Western Cape	Lack of relevant experience	<input type="checkbox"/>	<input type="checkbox"/>

This information can be edited or deleted, by using the tabs on the right of the above screen. Once finished, **MARK SECTION COMPLETE.**

6.1.3 SKILLS GAPS (FORM A2)

A Skills Gap refers to skills that an employee does not have to carry out job tasks competently. It is also referred to as "top-up" skills.

Form	A2	Section	WSS
Mandatory	Yes	Completed	No

Occupation	Reason	Add	Del
121212 Sales Manager	Lack of relevant experience	<input type="checkbox"/>	<input type="checkbox"/>

The SDF can export the WSS Form "A2" Template and after completion import it to the MIS. Click on **ADD** to manually insert the data on the MIS.

On the top of each form created within the WSS plan the SDF will be able to view the following details:

- The form section number
- Form section type
- Is the section mandatory
- Completed status
- Title of the form
- Notes for the content within the specific form.

This information can be edited or deleted, by using the tabs on the right of the above screen. Once finished, **MARK SECTION COMPLETE.**

The next section to complete is the **Annual Training Report (ATR)**. This section can be viewed under **point 7**.

6.2 MEDIUM (50 – 149) / LARGE ORGANISATIONS (150+)

On the left side of the page the SDF can view the following:

- The Organisations Trade Name
- Levy Number
- System Generated Reference Number
- The Period of the Report
- WSP Date Period
- ATR Date Period
- Submitted
- Completed Forms
- Closing Dates
- Day's left to submit

All of the above gives the SDF a clear indication of always knowing which organisation he / she is working with, in which period he / she is in, with the closing dates and the number of days left to submit.

To proceed from here the SDF can click on each line item on the contents page, this will activate the field and the form will be generated.

For the WSP / ATR to be submitted, each section needs to be marked as completed.

6.2.1 A3 – NATIONAL PROVINCIAL PROFILE

Provincial details of the headcount within the Organisation detailing the provincial split for your Organisation.

Trade name	Western Cape	Northern Cape	Eastern Cape	Free State	Gauteng	Mpumalanga	Limpopo	North West	KwaZulu-Natal	Grand Total
ABSA	10	10	10	10	10	10	10	10	10	90
SDL Number										
L067654321										
Company Size										
Large Company (150 + employees)										
Reference										
L067654321-19										
Period										
2018/2019										
Workplace Skills Plan										
1 January 2018 - 31 December 2018										
Annual Training Report										
1 January 2017 - 31 December 2017										
Submitted	False									
Completed Sections	0 OF 12									
IPC										
Closing Date	30 April 2018									
Days Left to Submit	88 Days Left									

On the top of each form created within the WSP / ATR plan the SDF will be able to view the following details:

- The form section number
- Form selection type
- Is the section mandatory
- Completed status
- Title of the form
- Notes for the content within the specific form.

Above the SDF is completing the provincial details of the headcount within the organisation, detailing the provincial split. Proceed by clicking on the **EDIT** tab on the right of the above screen.

Contents Page

WorkPlace Skills Plan

- ✓ A3. National Provincial Profile
- A4. Current Employment Profile
- A5. Annual Skills Priorities
- A6. Planned beneficiaries of education and training priorities
- A7. Planned external beneficiaries for training
- A8. Planned adult education and training
- A9. Highest education
- A11. Pivotal Plan

Province	Headcount
Western Cape	10
Northern Cape	10
Free State	10
Eastern Cape	10
North West	10
North East	10
Limpopo	10
Mpumalanga	10
Gauteng	10
Kwazulu-Natal	10
Grand Total	80

Above the SDF will have to complete the form by filling in the number of employees located in each province for the specific organisation. Once the form has been completed, proceed by clicking on **UPDATE**. This will save all information captured within the form. Continue by clicking on **MARK SECTION COMPLETE**.

Province	Headcount
Western Cape	10
Northern Cape	10
Free State	10
Eastern Cape	10
North West	10
North East	10
Limpopo	10
Mpumalanga	10
Gauteng	10
Kwazulu-Natal	10
Grand Total	80

Above the SDF can view a completed A3 form, where the completed status reads **YES**. Once all of the above is completed, under the contents page the SDF can now view that form A3 is marked with a green tick denoting that the section is now completed under the main contents page.

SDF can now proceed to the next form.

Employment profile of the Organisation detailing OFO codes per position title, race, gender, and disability details, age, provincial and municipality details.

The above section deals with the current employee profile of the organisation, detailing OFO codes, per position title, race, gender and disability details, age, provincial and municipality details. The SDF will have to complete the above information for each employee within the organisation. Click on **ADD** to proceed. Make selections from the dropdowns provided for the following:

- For each of the above selections the SDF must add the number of employees. When the above section is complete, click on **UPDATE** to save the data.

Above the SDF can view a sample of a completed A4 form. The above list contains the selected categories as well as the number of employees in each province.

In all the forms within the report the SDF can at **EDIT** or **DELETE** an entry, by using the tabs provided on the right of the page.

Once the SDF has completed the above form to his satisfaction, click on **MARK SECTION COMPLETE**.

6.2.3 A6 – PLANNED BENEFICIARIES FOR TRAINING

Individuals planned for training detailing OFO codes, race and gender breakdown, disability, provincial, municipality as well as PIVOTAL details.

The above section relates to the planned beneficiaries for training interventions. The SDF is to complete the above section as per planned beneficiary training interventions.

To proceed with form A6 click on **ADD**.

The screenshot shows a web-based form titled 'Form to Update Data'. It includes a sidebar with navigation links like 'Home', 'WSP and ATR Administration', 'My Profile', and 'Logout'. The main form area has tabs for 'Edit Form', 'Form to Update Data', and 'Form to Add New Beneficiary'. The 'Form to Update Data' tab is active, showing fields for 'Occupation Category', 'OFO Code', 'Province', 'Municipality', 'ABSA', 'Company Size', 'Period', 'Workshop Skills Plan', 'Annual Training Report', 'Subsidized', 'Completed Sections', and 'Closing Date'. There are also checkboxes for 'Males', 'Females', 'Disabled', and 'Age Groups'.

SDF to make selection from the dropdown included above. Above the SDF can view a sample of a completed form. Selections have to be made from the following dropdown tabs:

- Occupation Category
- OFO Code
- Province
- Municipality

Once the selections are made in the above the SDF can proceed to fill in the numbers as per the following:

- Males
- Females
- Disabled
- Age Groups.

If the above is linked to PIVOTAL funding, the self-same section has to be ticked. Once this has been completed, a search box will appear, where the SDF will have to select the programme from the list provided.

To proceed with the form, click on ADD. Proceed by clicking on **UPDATE** to save the inserted information.

The screenshot shows a web-based form titled 'Form to Add New Beneficiary'. It includes a sidebar with navigation links like 'Home', 'WSP and ATR Administration', 'My Profile', and 'Logout'. The main form area has tabs for 'Edit Form', 'Form to Update Data', and 'Form to Add New Beneficiary'. The 'Form to Add New Beneficiary' tab is active, showing fields for 'Services', 'Mandatory', 'Title', and a table for 'Planned Beneficiaries for Training'. The table has columns for 'Category', 'OFO Code', 'Occupation', 'Province', 'Municipality', 'PIVOTAL', 'PIVOTAL Programme', and various demographic and training-related data points. There are also checkboxes for 'Males', 'Females', 'Disabled', and 'Age Groups'.

Above is a sample of the completed planned beneficiaries for training form. Once again the information added can be edited or deleted at any time using the tabs on the right of the above page.

Above the SDF can view a sample of a completed form. Selections have to be made from the following dropdown tabs:

- Occupation Category
- OFO Code
- Province
- Municipality

Once the selections are made in the above the SDF can proceed to fill in the numbers as per the following:

- Males
- Females
- Disabled
- Age Groups.

Selection can be made if this is a pivotal programme using the search function.

Above is a completed sample of the A7 form, which has now been marked as completed.

Once all of the above is completed, under the contents page the SDF can now view that form A7 is marked with a green tick denoting that the section is now completed under the main contents page.

6.2.5 A8 – PLANNED ADULT EDUCATION AND TRAINING

Above section A8 deals with the planned Adult Education and Training interventions, detailing OFO codes, race, gender, disability, provincial, municipality as well as the PIVOTAL details.

Proceed by clicking on **ADD**.

Above the SDF can view a sample of a completed form. Selections have to be made from the following dropdown tabs:

- Occupation Category
- OFO Code
- Province
- Municipality

Once the selections are made in the above the SDF can proceed to fill in the numbers as per the following:

- Males
- Females
- Disabled
- Age Groups.

Selection can be made if this is a pivotal programme using the search function.

The screenshot shows the 'WSP and ATE Submissions' form, specifically the 'A8' section. The form is titled 'Planned Adult Education and Training'. It includes fields for 'Form' (A8), 'Mandatory' (Yes), 'Section' (WSP), and 'Completed' (No). The 'Trade name' is 'ABSA'. The 'SGL Number' is 'LSB7054321'. The 'Company Size' is 'Medium Company (50 to 149 employees)'. The 'Period' is '2018/2019'. The 'Workplace Skills Plan' is '1 January 2018 - 31 December 2018'. The 'Annual Training Report' is '1 January 2017 - 31 December 2017'. The 'Submitted' status is 'False'. The 'Completed Sections' are '4 OF 12'. The 'Closing Date' is '30 April 2018'. The 'Days Left to Submit' is '88 Days Left'. The form includes a table for 'Planned AET training interventions detailing OFO codes, race and gender breakdown, disability, provincial, municipality as well as PIVOTAL details'. The table has columns for 'OFO Code', 'Occupation', 'Province', 'Municipality', 'Employment', 'PIVOTAL', 'PIVOTAL Programme', and a grid for 'Males', 'Females', 'Disabled', and 'Total'. The 'Mark section complete' button is visible at the bottom right.

Above is a sample of a complete A8 form. Click on **Mark Section Complete** to update the contents page.

6.2.6 A9 – HIGHEST EDUCATIONAL PROFILE

Section A9, which deals with the Highest Education qualification of each employee within the organisation, inclusive of race, gender and disability status. Proceed by clicking on **ADD**.

The screenshot shows the 'WSP and ATE Submissions' form, specifically the 'A9' section. The form is titled 'Highest Educational Profile'. It includes fields for 'Form' (A9), 'Mandatory' (Yes), 'Section' (WSP), and 'Completed' (No). The 'Trade name' is 'ABSA'. The 'SGL Number' is 'LSB7054321'. The 'Company Size' is 'Medium Company (50 to 149 employees)'. The 'Period' is '2018/2019'. The 'Workplace Skills Plan' is '1 January 2018 - 31 December 2018'. The 'Annual Training Report' is '1 January 2017 - 31 December 2017'. The 'Submitted' status is 'False'. The 'Completed Sections' are '5 OF 12'. The 'Closing Date' is '30 April 2018'. The 'Days Left to Submit' is '87 Days Left'. The form includes a table for 'Highest qualification of each employee within the organisation inclusive of race, gender and disability status'. The table has columns for 'Province', 'NQF Level', and a grid for 'A', 'B', 'C', 'D', 'E', 'F', 'G', 'H', 'I', 'J', 'K', 'L', 'M', 'N', 'O', 'P', 'Q', 'R', 'S', 'T', 'U', 'V', 'W', 'X', 'Y', 'Z', 'Total'. The 'Mark section complete' button is visible at the bottom right.

In the form below the SDF should select from the dropdown tabs the following:

- Province
- NQF Level

Once the above is selected, proceed to complete the relevant numbers for the organisation for the highest education levels in the different provinces for each race, gender and disability status.

Below the SDF can view a sample of a completed A9 Listing.

The screenshot shows the 'WSP and ATR Submission' form. The 'A9 Listing' tab is selected. The form includes fields for 'Trade name', 'SDF Number', 'Company Size', and a table for listing employees. The table has columns for 'Province', 'NQF Level', and a grid for race, gender, and disability status. The table shows data for 140 employees across various NQF levels and provinces. The 'Mark section complete' button is visible at the bottom right.

Click on **Mark Section Complete** to update the contents page.

6.2.7 A10 – DEVELOPMENT AND CONSULTATIVE PROCESS

The screenshot shows the 'WSP and ATR Submission' form, specifically the 'A10 Development and Consultative Process' section. The form includes questions about the company's development and consultative process, with checkboxes for 'Yes' and 'No'. The 'Mark section complete' button is visible at the bottom right.

Complete A10 and click on **SAVE** and **Mark this section complete** to finalise this section.

6.2.8 A11 – PIVOTAL PLAN REPORT

Menu

Exit form

Trade name

Smart Loans PTY Ltd

SDL number

L123456789

Reference

L123456789-17

Period

2016/2017

Workplace Skills Plan

1 May 2016 - 30 April 2017

Annual Training Report

1 May 2015 - 30 April 2016

Submitted

False

Completed Forms

7 OF 14

50%

Closing Date

30 April 2016

Day's Left to Submit

170 Day's Left

Contents Page

WorkPlace Skills Plan

✓ A3. National Provincial Profile

✓ A4. Current Employment Profile

✓ A5. Annual Skills Priorities

✓ A6. Planned beneficiaries of education and training priorities

✓ A7. Planned external beneficiaries for training

✓ A8. Planned adult education and training

✓ A9. Highest education

A11. Pivotal Plan

Annual Training Report

B2. Annual Skills Priorities

B3. Training Beneficiaries Report

B4. Variance Report

B5. External Beneficiaries

B6. Completed Adult Education and Training

B7. Learning Programmes for the year ending

B8. Pivotal Training Report

WSP and ATR Documents

Documents

Menu	WSP and ATR Submissions	No. Trade	Logout
Form	A11	Section	WSP
End form	Title	Pivotal Plan Report	
Trade name	Reference		
ASDA	Category	Code	Occupation
ASDA	Manager	12110	Manager
L123456789	Profession	12110	Manager
Magnum Company (SD to 140 employees)	Occupation	12110	Manager
Reference	Occupation	12110	Manager
L123456789-17	Occupation	12110	Manager
Period	Occupation	12110	Manager
2016/2017	Occupation	12110	Manager
Workplace Skills Plan	Occupation	12110	Manager
1 January 2016 - 31 December 2016	Occupation	12110	Manager
Annual Training Report	Occupation	12110	Manager
1 January 2015 - 31 December 2015	Occupation	12110	Manager
Submitted	Occupation	12110	Manager
False	Occupation	12110	Manager
Completed Services	Occupation	12110	Manager
6 OF 12	Occupation	12110	Manager
50%	Occupation	12110	Manager
Closing Date	Occupation	12110	Manager
30 April 2016	Occupation	12110	Manager
Days Left to Submit	Occupation	12110	Manager
87 Day's Left	Occupation	12110	Manager

Above the SDF can view the Pivotal Plan Report that the system has generated once the SDF completed forms A6, A7 and A8. This is a view only report, no changes can be made here, if the SDF wishes to make any changes he will have to go to the relevant form and administer the changes there.

Status on the indication bar now shows 50% completed.

The SDF has now completed the Workplace Skills Plan, the next section to be completed is the Annual Training Report.

7. COMPILE AN ANNUAL TRAINING REPORT (ATR)

7.1 SMALL ORGANISATIONS (1 – 49)

7.1.1 B1 – ANNUAL TRAINING REPORT

Section B1, refers to Annual Training Report of all the training that has taken place in the previous financial year. To proceed to complete the form.

The screenshot shows the 'B1' section of the 'WSP and ATR Submission' form. The 'Trade name' is 'Quick Loans PTY'. The 'SGL Number' is 'L123456789'. The 'Company Size' is 'Small Company (1 to 49 employees)'. The 'Period' is '1 January 2018 - 31 December 2018'. The 'Annual Training Report' is 'Submitted'. The 'Submitted' date is '1 January 2017 - 31 December 2017'. The 'Submitted' status is 'False'. The 'Completed Sections' are '4 OF 5'. The 'Closing Date' is '30 April 2018'. The 'Days Left to Submit' is '97 Days Left'.

Above the SDF can view a sample of a B1 form. For the form and the data within to be saved, the SDF should click on **SAVE**.

The SDF can **EDIT** and or **DELETE** the above information at any given time and recapture if the information was deleted.

7.1.2 DOCUMENTS

The SDF can now upload the Confirmation and Authorisation Letter to the MIS.

The screenshot shows the 'B1' section of the 'WSP and ATR Submission' form, specifically the 'Documents' tab. The 'Trade name' is 'Quick Loans PTY'. The 'SGL Number' is 'L123456789'. The 'Company Size' is 'Small Company (1 to 49 employees)'. The 'Period' is '1 January 2018 - 31 December 2018'. The 'Annual Training Report' is 'Submitted'. The 'Submitted' date is '1 January 2017 - 31 December 2017'. The 'Submitted' status is 'False'. The 'Completed Sections' are '4 OF 5'. The 'Closing Date' is '30 April 2018'. The 'Days Left to Submit' is '97 Days Left'.

7.2 MEDIUM (50 – 149) / LARGE ORGANISATIONS (150+)

7.2.1 B3 – TRAINING REPORT FOR EMPLOYED

Section B3 deals with individuals completed training detailing OFO codes, race and gender breakdown, disability, provincial, municipality as well as PIVOTAL details.

Category	OFO Code	Occupation	Province	Municipality	PIVOTAL	PIVOTAL Programme	A	M	F	D	C	I	W	O	O	<	35-55	>	Total	Other Country	
Managers	121103	Credit Manager	Western Cape	City of Cape Town Metropolitan Municipality	Yes	National Diploma: Credit Management	0	2	0	4	2	0	2	0	0	0	0	0	5	0	10

Above is a sample of the completed B3 form. The SDF first selected the following:

- Occupation Category
- OFO Code
- Province
- Municipality

Once all of the above was added, he then proceed to complete and fill in the numbers for each gender group, disabled and age groups, creating a completed form for the occupation category selected. Proceed by clicking on **ADD**.

7.2.2 B5 – EXTERNAL BENEFICIARIES (INCLUDING 18.2 LEARNERS) OF EDUCATION AND TRAINING

External beneficiaries completed training detailing OFO codes, race and gender breakdown, disability, provincial, municipality as well as PIVOTAL details (e.g. Learnerships).

Proceed to the forms by clicking on **ADD**. Above is a sample of the B5 form. The SDF first selected the following:

- Occupation Category
- OFO Code
- Province
- Municipality

Once all of the above was added, he / she then proceeds to complete and fill in the numbers for each gender group, disabled and age groups, creating a completed form for the occupation category selected. Once the above form is completed, click on **ADD** to save the information.

Proceed by clicking **MARK SECTION COMPLETED**.

7.2.3 B6 – COMPLETED ADULT EDUCATION AND TRAINING

Section B6, Completed AET training interventions detailing OFO codes, race and gender breakdown, disability, provincial, municipality as well as PIVOTAL details

Above is a sample of the B6 form. Click on **ADD** to finalise this form.

The SDF is to complete the following:

- Occupation Category
- OFO Code
- Province
- Municipality

Once all of the above was added, he / she then proceeds to complete and fill in the numbers for each gender group, disabled and age groups, creating a completed form for the occupation category selected. Once all information has been inserted, click on **ADD** to save the information.

7.2.4 B7 – LEARNING PROGRAMMES FOR THE YEAR ENDING

Section B7, all learning interventions per sector skills plan and learning type.

On the form above complete the following:

- Skills Priority

- Type of Learning Programme
- Number of learners completed
- Total spent on training

SDF to use the dropdowns provided, to make selections. Once completed click on **SAVE** to save the data.

Home WSP and ATR Submissions My Profile Logout

Menu
Exit Form

Trade name
ABSA
SDL Number
L987654321
Company Size
Medium Company (50 to 149 employees)
Reference
L987654321-19
Period
2018/2019
Workplace Skills Plan
1 January 2018 - 31 December 2018
Annual Training Report
1 January 2017 - 31 December 2017
Submitted
False
Completed Sections
9 OF 12
75%
Closing Date
30 April 2018
Days Left to Submit
97 Days Left

Form B7 Section ATR
Mandatory Yes Completed No
Title Learning Programmes for the year ending
Notes All learning interventions per SSP and Learning Type.

Add

Critical Strategic Skills Priority Linked to	Type of Learning Programme	Number of Learners Completed	Total Training Spend	Edit	Del
Management and Leadership skills development	Occupational/Professional	1	10000.0000		
		1	10000		

Mark section complete
Close

Section B7, completed showing the list of learning programmes for the year. **MARK SECTION COMPLETE**, and move on to section B8.

7.2.5 B8 – PIVOTAL TRAINING REPORT

Home WSP and ATR Submissions My Profile Logout

Menu
Exit Form

Trade name
ABSA
SDL Number
L987654321
Company Size
Medium Company (50 to 149 employees)
Reference
L987654321-19
Period
2018/2019
Workplace Skills Plan
1 January 2018 - 31 December 2018
Annual Training Report
1 January 2017 - 31 December 2017
Submitted
False
Completed Sections
10 OF 12
83%
Closing Date
30 April 2018
Days Left to Submit
97 Days Left

Form B8 Section ATR
Title PIVOTAL Training Report
Notes

Category	OFO Code	Occupation	Province	Municipality	Socio Economic status	PIVOTAL Programme	A	C	C	C	I	I	W	W	Q	O	O	X	35-	35-	SS	Total	Other Country
Managers	121103	Credit Manager	Western Cape	City of Cape Town Metropolitan Municipality	Yes	National Diploma: Credit Management	0	4	2	0	2	0	0	0	0	0	0	0	5	5	0	10	
							0	4	2	0	2	0	0	0	0	0	0	0	5	5	0	10	

Close

Above the SDF can view the Pivotal Plan Report that the system has generated once the SDF completed forms A6, A7 and A8. This is a view only report, no changes can be made here, if the SDF wishes to make any changes he / she will have to go to the relevant form and administer the changes there.

The next section to be completed is the **Documents** that need to be uploaded.

The screenshot shows the 'WSP and ATR Submissions' dashboard. On the left is a sidebar menu with options like 'Menu', 'Exit Form', 'Trade name', 'SDL Number', 'Company Size', 'Reference', 'Period', 'Workplace Skills Plan', 'Annual Training Report', 'Submitted', 'Completed Sections', 'Closing Date', 'Days Left to Submit', and '97 Day's Left'. The main content area is titled 'WSP and ATR plan ready to go' and contains a 'Contents Page' with a list of sections: A3. National Provincial Profile, A4. Current Employment Profile, A6. Planned Training for Employed, A7. Planned Training for Unemployed, A8. Planned Adult Education and Training, A9. Highest Education Profile, A10. Development and Consultative Process, A11. PIVOTAL Plan, Annual Training Report, B3. Training Report for Employed, B5. Training Report for Unemployed, B6. Completed Adult Education and Training, B7. Learning Programmes, B8. PIVOTAL Report, and Documents. The 'Documents' section is highlighted with a green checkmark.

7.2.6 DOCUMENTS

The screenshot shows the 'WSP and ATR Submissions' dashboard with the 'Documents' section selected. The main content area is titled 'WSP and ATR Documents' and contains a table with columns: Section, Documents, Form, and WSP and ATR Documents. The 'Documents' column shows 'Mandatory' and 'Yes'. The 'Form' column shows 'Completed'. The 'WSP and ATR Documents' column shows 'Yes'. Below the table, there is a 'Download Authorization Form Template' link. A message states: 'Letter confirming Subsidiary Companies for Finance Processing'. There are two 'Click to Downloadview' links. Below this, there is an 'Additional Documents' section with a message: 'Upload additional documents'. There is a 'Document Name' field and a 'Document Description' field. There is a 'Browse...' button and a 'Submit File' button. There is a 'Cancel upload' link. There is a 'Close' button.

In this section the SDF will have to upload the WSP / ATR Documents

- Proof of Banking Details
- Consultation Letter
- Authorization Letter

The Authorization letter will have to be downloaded, completed and the completed form will have to be uploaded into the system.

Menu
Submit WSP/ATR
Exit form

WSP and ATR Submission

• Please note: No amendments are permitted once the WSP and ATR Plans have been submitted.

Company Name	Smart Loans PTY Ltd	SDL number	L123456789
Reference	L123456789-17	Period	2016
Proof of Banking Details	Click here to view		
Consultation Letter	Click here to view		
Authorization form	Click here to view		
Date Created	11 November 2015 19:53	SDF who created the plan	Mrs Anusha

☐ I have completed the whole WSP and ATR and would like to submit

Cancel

Trade name

Smart Loans PTY Ltd

SDL number

L123456789

Reference

L123456789-17

Period

2016/2017

Workplace Skills Plan

1 May 2016 - 30 April 2017

Annual Training Report

1 May 2015 - 30 April 2016

Submitted

False

Completed Forms

14 OF 14

100%

Closing Date

30 April 2016

Day's Left to Submit

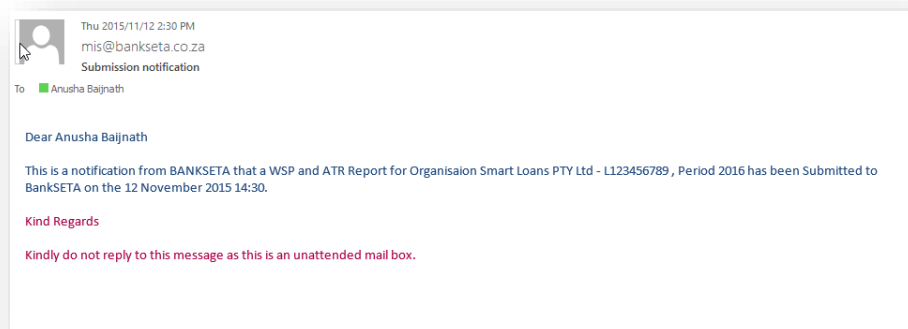
170 Day's Left

To submit a file the SDF should first click on **BROWSE**, and when the windows browser opens, select the file from your desired location. Once the file is selected, click on **OPEN**, and then proceed to submit file.

Above the SDF is to note that he / she has now completed his / her WSP / ATR report and the self-same report is now ready for submission. Proceed by clicking on **SUBMIT WSP / ATR** on the left menu.

8. SUBMISSION

Once the SDF clicks on the submission tab, the above screen will appear. The SDF is to note that once the report has been submitted, no amendments will be allowed.



Proceed here by ticking in the box, declaring that you have completed the whole WSP / ATR and would like to submit.

Once all of the above is complete, click on **SUBMIT**

PLAN.

The SDF can now view that his / her plan has been submitted, and is awaiting approval by BANKSETA. A print

WSP and ATR Submission


• Please note: No amendments are permitted once the WSP and ATR Plans have been submitted.

Company Name	Smart Loans PTY Ltd	SDL number	L123456789
Reference	L123456789-17	Period	2016
Proof of Banking Details	Click here to view		
Consultation Letter	Click here to view		
Authorization form	Click here to view		
Date Created	11 November 2015 19:53	SDF who created the plan	Mrs Anusha

☒ I have completed the whole WSP and ATR and would like to submit

Submit Plan

Cancel



function has been added for the SDF, where he / she is able to print out the complied report for his / her reference.

The SDF will receive email notification that the report has been submitted including the date on which it was submitted.

This brings us to the end of the BANKSETA online WSS / WSP / ATR registration module.