Reference Manual
for SDF/ISDFs
2011
Version 1.2
(March 2011)

Our Vision:
The MICTS seeks to develop South Africa into an ICT knowledge-based society by encouraging more people to develop skills in this sector as a means of contributing to economic growth.

Our Mission:
The MICTS will generate, facilitate and accelerate the processes of skills development for workers at all levels in the ICT Sector by linking future technology trends with new skills development programs.
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1 Introduction

1.1 Purpose of this Reference Manual

At the time of publishing this document, there are two types of grants that the MICTS can/may provide to MICTS employer stakeholders, namely:

- Mandatory Grants. This grant is paid to MICTS stakeholders on the basis of the submission and approval of the Annual Training Report (ATR) and Workplace Skills Plan (WSP). This manual primarily addresses the requirements for Mandatory Grants.

- Discretionary Grants. This funding is provided to MICTS stakeholders who are providing training that assists the achievement of the MICTS commitments to the Department of Higher Education and Training. For further information on this, please consult Section 4.12 and Section 4.13.

There is a third grant that may be implemented in the new future. This grant is called the “Pivotal Grant”. For further information on Pivotal Grants, please refer to Section 1.4.

The purpose of this SDF/ISDF Reference manual is to inform MICTS Skills Development Facilitators (SDFs), Independent Skills Development Facilitators (ISDFs) and employers of the Grant Payment Process, with specific reference to the MICTS and its On-Line Grant System. Various sources have been used to compile this Reference Manual, including email queries from SDFs and ISDFs. This document is intended to be a comprehensive reference document that will assist SDFs and ISDFs with all aspects of the Grant Payment Process, and is intended to alleviate queries from SDFs and ISDFs.

1.2 Layout of the Reference Manual

This manual is segmented as follows:

Chapter 1: Provides an overview of the grant payment process, important dates, the criteria for grant payments, the role of the Skills Development Facilitator (SDF), and the On-Line Grant System.

Chapter 2: Takes the reader through the process of registering on the On-Line Grant System, capturing and submitting the ATR and WSP data, and provides an overview of the Organising Framework for Occupations (OFO).

Chapter 3: Presents the On-Line Grant System Utilities that are available to the SDF.

Chapter 4: Presents additional important points that the SDF should note, such as what support is available from MICT’s SSP Division.

Chapter 5: Provides assistance to SDFs regarding some typical problems that SDFs have experienced in the past.

Chapter 6: Presents contact details should SDFs need to contact MICTS for assistance.

Appendix 1: Provides an overview of the legislation that impacts on skills development in South Africa. This appendix will be updated once the latest legislation is at hand.

Appendix 2: Provides a template of a typical Letter of Appointment, to be used when a new SDF has to register on the On-Line Grant System.

Appendix 3: Provides a description of the OFO and Scarce and Critical Skills.

Appendix 4: Presents the MICTS process for inter-seta transfers.

Appendix 5: Presents the procedure that will enable a company to obtain a participation confirmation letter.

Appendix 6: Presents the procedure that will enable a new company register with MICTS.

1.3 Confidentiality

With regards to the data that is collected by MICTS through this Grant Payment Process, employers and SDFs/ISDFs are assured that all information received is treated with the highest regard for
confidentiality. Data received in this process is aggregated for the purposes of research and planning.

1.4 The Mandatory and Pivotal Grant Payment Process

Organisations are allocated to Setas based on the Standard Industrial Classification (SIC) code. This code can be found on your EMP201 form, as well as the Seta code, which, in the case of MICTS, is “12”. For the list of which SIC codes are handled by each Seta, please download the “SIC Codes per Seta” file from your dashboard (see Section 2.3.6).

Each month, organisations with a total annual payroll of more than R 500,000.00 contribute 1% of total annual payroll in the form of a Skills Development Levy (SDL) contribution to the Skills Development Fund, which is administered by the South African Revenue Services (SARS), according to legislation. This contribution that the organisation makes is reflected on its monthly EMP201 form, which also reflects PAYE and UIF paid.

Upon submission of an Annual Training Report (ATR) and Workplace Skills Plan (WSP) to its relevant Seta, and provided that the ATR and WSP are approved by MICTS, the organisation will receive its Mandatory Grant, paid back to the organisation on a quarterly basis. The ATR provides the Seta with the data of what training the company has performed in the past year, whereas the WSP provides data on what training the company intends performing during the forthcoming year. These “years” are from 1st April to 31st March.

With regard to SDL contributions made by companies, to date, SARS allocates the company’s SDL contribution as shown in the following figure.

The Department of Higher Education and Training (DHET), at the time of publishing this document, is considering modifying the above allocation, by reducing the Mandatory Grant to 40% and introducing the concept of Pivotal Grants, to be valued at 10% of levy contributions. “Pivotal” is an acronym that stands for “Professional, Vocational, Technical and Academic Learning”.

While formal clarification on the definition of Pivotal Grants is still required from DHET, it appears to be a concept that applies to pivotal training programmes. Pivotal training programmes are seen to be “bridging” programmes, the intention being to assist learners to move to the next level when “they are not quite there”. An example of this is assisting university graduates to gain workplace experience in order to fast track their productivity. Generally, the Isett Seta (now MICTS) has been involved in this area in the past through sponsoring graduate learners on 6 to 12 month Internship programmes, which encompasses workplace experience, but may also include skills programmes or short courses. Another example is to sponsor learners at universities of technology during the last 6 months of their education where they are required to gain workplace experience in a company.

According to DHET documentation received to date:

- An additional ‘pivotal grant’ can be provided to/applied for by companies [for bridging training programmes] and is calculated on the basis of a standard cost per learner per programme (set by programme type and level) multiplied by the number of students accepted onto accredited workplace learning programmes. This component is NOT limited to the levy paid by the firm, [i.e. companies may be awarded more than the 10% Pivotal Grant].

- “Pivotal programmes are those ‘Professional, Vocational, Technical and Academic Learning’ programmes that meet the critical needs for economic growth and social development. They
are also programmes that generally combine course work at universities, universities of technology and colleges with structured learning at work. This is achieved by means of professional placements, work-integrated learning, apprenticeships, learnerships, internships and the like. To achieve this goal, there must not only be improved access to, and success at post-school learning sites, such as universities and colleges, but there must also be structured bridges to the world of work and quality learning upon arrival there."

- **PIVOTAL programmes** are distinguished from skills programmes in that they reach beyond a particular application or specialisation and signal to the labour market that graduates are able to meet the full range of challenges normally associated with the occupation. This cluster of programmes is critical in a context where broader, more generic occupational skills are required by those who must be able to flexibly respond to a rapidly changing world.

- **Pivotal programmes** provide the bridge to the world of work.

Regarding how to apply for pivotal programme sponsorship, at this stage it is suggested that stakeholders follow the same process as discretionary grants. In this case, download the Letter of Intent from the Isett/MICTS website, complete it and submit it to The Senior Manager, Learning Programmes Division. Once further information comes to light, we will inform SDFs via a communiqué.

For further information on the grant payment schedule, please refer to Section 2.7.

If the employer does not submit an ATR/WSP by the 30th June each year, and if this submission is not approved by MICTS, the Mandatory Grant will not be paid, and the Seta must transfer the employer’s unclaimed mandatory grant funds to the discretionary fund.

In terms of the relevant regulations, requests for extensions may be entertained or accepted by the Seta. The penalty for submitting mandatory grant applications late is losing the grant in full. The only exception to this is where a mandatory grant application is submitted within 6 months of registration in the case of an employer who has registered for the first time in terms of section 5(1) of the Skills Development Levies Act (SDL). The ATR and WSP must be submitted to MICTS by no later than 30th June each year in terms of the Department of Higher Education and Training's national deadline.

People often ask the question “I have spent an X amount in training, how much can I claim from the Seta?” Please note that the Grant Payment Process does not involve claiming expenses for training from a Seta. It is simply a mechanism to receive the Mandatory Grant back.

If your total annual payroll is more than R 500 000 and none of our employees will be going on any courses in the near future, there is no benefit to submitting your ATR/WSP. The purpose of the Skills Development process instituted by the Department of Higher Education and Training is to encourage the development of skills, so at least one person in the organisation has to do at least one training course. Nevertheless, we recommend that you maintain your contact details on the MICTS On-Line Grant System so that MICTS can keep you informed of new developments.

1.5 **First Time ATR/WSP Submissions**

If you are submitting your ATR/WSP reports for the first time to MICTS, you will be required to submit only your WSP. This applies to:

- New companies joining MICTS for the first time.
- Companies that missed submitting in the previous year.
- Companies moving from MapppSeta to MICTS.

1.6 **Important Dates**

**The MICTS On-Line Grant System (OGS) goes live on the 1st April each year.** If the OGS goes on-line earlier or later, SDFs/ISDFs will be informed via email.

**The date for final submission of the ATR and WSP is the 30th June.** The On-Line Grant System will close at midnight on the 30th June. With regards to extensions, please refer to Section 2.6.1.

Setas will accept ATRs/WSPs submitted after this date, but employers will not be entitled to mandatory grants for late submissions.
The WSP of newly registered organisations must be submitted within 6 months of establishment. In this case, only the WSP must be completed in the first year.

Also refer to Section 2.6.2.

1.7 Suggested ATR/WSP Submission Project Plan

Inevitably, each year, about one-third of all submissions happen on the last day (30 June). This not only proves somewhat hectic for the SSP staff who are trying to help people with difficulties, but there have also been several instances where SDFs have experienced difficulties in submitting on time, resulting in their companies losing their Mandatory Grants. Furthermore, our service provider that houses the On-Line Grant System has several other Setas as clients, so towards the end of June, there are many SDFs making use of these systems, which can cause the system to slow down.

Presented below is a small project plan that may assist you in not leaving things too late. Note that the project plan suggests that SDFs should submit their ATR/WSP by mid-June.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Feb-2010</th>
<th>Mar-2010</th>
<th>Apr-2010</th>
<th>May-2010</th>
<th>Jun-2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attend MICTS Road Shows</td>
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<td>Study the MICTS Seta SDF Reference Manual</td>
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<tr>
<td>Ensure that you are registered as an SDF with MICTS</td>
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<tr>
<td>Compile a list of all employees, as per the suggested table in Chapter 2 of the SDF Reference Manual</td>
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<tr>
<td>Allocate OFO codes to all employees if not already available</td>
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<tr>
<td>Use ATR/WSP template to gather skills development data from relevant company managers</td>
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<tr>
<td>If more than one ATR/WSP templates completed, consolidate into one template</td>
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<tr>
<td>Enter ATR/WSP data On-line</td>
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<tr>
<td>All relevant required parties to sign off and submit on-line</td>
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</table>

1.8 Important References

The following documents are also available on the MICTS website, www.isett.org.za.

- Skills Development Act (No. 97 of 1998) as amended by the Amendment - Skills Development Act – 2003 and 2008 (SDA)
- The Skills Development Levies Act (No. 9 of 1999) (SDLA)
- Amendments to Sector Education and Training Authorities (Setas) Grant Regulations Regarding Monies Received by a Seta and Related Matters, November 2006, Skills Development Act, 1998 (Act No. 97 of 1998)

An overview of the legislation is presented in Appendix 1.

1.9 Criteria for Mandatory Grant Payments

Employers who meet the following criteria will qualify for Seta mandatory grants for the submission of ATRs and WSPs:

a) The employer has registered with the Commissioner of SARS for payment of the skills levy as prescribed in section 5 of the Skills Development Levies Act (SDLA);

b) The employer has paid the levies directly to the commissioner in the manner and within the time period determined in the act;
c) The employer is up to date with levy payments at the time of approval of the application for the grant re-imbursement;

d) The employer has submitted an ATR and a WSP in the format prescribed in the latest Seta Grant Regulations.

e) The employer has submitted an ATR and a WSP within the timeframes prescribed in the latest Seta Grant Regulations.

f) The employer has submitted an ATR and a WSP that conforms to any other requirements as prescribed in the latest Seta Grant Regulations.

g) The employer has submitted an ATR that describes performance in respect of the implementation of training.

h) If the company is new to MICTS or has changed its banking details, the employer has provided original banking details to MICTS. This can take the form of:

1. **An original cancelled cheque**. (Not a copy). This is a cheque that torn out of the company’s chequebook, two diagonal lines are drawn across the cheque and “Cancelled” is written between the two lines. Note that the company name on this cheque must be the same as the company name shown in the On-Line Grant System under the Department of Higher Education and Training Data column. If the company’s registration number appears on the cheque, this number must also be the same as the number shown in the On-Line Grant System under the Department of Higher Education and Training Data column.

2. **An original letter from your bank**. (Not a copy). As an alternative to providing us with an original cancelled cheque, you can provide us with an original letter from your bank. This letter must be on the letterhead of the bank, must be stamped by the bank, and must reflect the company’s registration number. Once again, the company name on this letter must be the same as the company name shown in the On-Line Grant System under the Department of Higher Education and Training Data column, and the company’s registration number must also be the same as the number shown in the On-Line Grant System under the Department of Higher Education and Training Data column.

3. If the name/registration number of the company on the original cancelled cheque or original bank letter is not the same as the company name shown in the On-Line Grant System under the Department of Higher Education and Training Data column, you need to provide us with the Change of Name certificate (or certificates) which relates the company name shown in the On-Line Grant System under the Department of Higher Education and Training Data column to the company name on the cheque or bank letter.

4. Please then send this documentation to either:

   Sharnel Santhilal  
   SSP and Research Division  
   The MICT Seta  
   P.O. Box 5585  
   Halfway House  
   1685  

   Or

   Sharnel Santhilal  
   SSP and Research Division  
   The MICT Seta  
   Gallagher House, Level 3  
   Gallagher Estate  
   19 Richards Drive  
   Midrand

If the documents are delivered to Gallagher House, please ensure that they are delivered to MICT Seta, not to the Gallagher Estate security.
Setas may request additional information in ATRs and WSPs to gather information that is relevant to specific sectors.

Employers who fail to meet the prescribed criteria will not be eligible for the grant.

### 1.10 The Role of an SDF/ISDF

In the Grant Payment Process, a Skills Development Facilitator (SDF) or Independent Skills Development Facilitator (ISDF) is required. An SDF will be someone nominated within the organisation to assume responsibility for gathering and submitting the ATR and WSP data to a Seta. An ISDF has the same responsibilities but works as a consultant, i.e. an ISDF is not an employee of the client organisation.

### 1.11 Training Committee

A very important function of the SDF is to establish a Training Committee for the enterprise or company. **Employers with more than 50 employees must establish an in-company forum for consultation with regard to skills development.** Where a workplace is unionised, trade unions or management structures could fulfil this function. It is important that workplace consultative structures be consulted in the appointment of a Skills Development Facilitator.

Some of the functions that the Training Committee should assist with are to:

- Develop a Training Policy.
- Ensure that the development and implementation of the Workplace Skills Plan is aligned to the strategic Mission and Vision of the company.
- Keep the envisaged training and development of employees in the company abreast with the long-term transformation objectives of the company.
- Ensure that the Workplace Skills Plan is aligned to the Employment Equity Plan and Business Plan of the company.
- Establish training priorities for the company based on its short and long term needs.
- Align training to the Sector Skills Plan, learnerships, career pathways, accredited national qualifications, etc.
- Support the SDF in communicating the completed Workplace Skills Plan to other employees in the company.
- Monitor the implementation of the Workplace Skills Plan.
- Periodically revise the Workplace Skills Plan. This will in most cases be carried out in conjunction with the Training Committee.
- Compile the Annual Training Report.

Once the ATR/WSP process has been completed, the SDF, the employer and the employee representative (if your organisation has 50 or more employees) must sign the Authorisation Form.

The Training Committee should comprise at least one employer representative, one employee representation and the Skills Development Facilitator. The contact details of these people are required as part of the ATR/WSP submission process. Furthermore, as part of our ATR/WSP sample audit process, companies will be required to submit two signed copies of minutes of the Training Committee meetings, held during the past year.

### 1.12 Training Layoff Scheme

If you intend taking advantage of the Training Layoff Scheme (TLS), you need to apply to the CCMA (CCMA Call Centre: 0861 16 16 16 or e-mail TrainingLayoff@CCMA.org.za).

The CCMA will provide you with the application form which you need to complete and submit to the CCMA.

The CCMA will assess and approve the TLS application and recommend to the National Skills Fund (NSF) and the Seta for the TLS process to be implemented.

The NSF will pay the allowance and the Seta will pay for the Training Cost, unless the Seta has no funds to pay for the Training Cost, in which case you can then apply to the NSF for the training funds.
1.13 Organisation Access to ISDFs

If your organisation prefers to use the services of an ISDF instead of having your own internal SDF, you will find a downloadable list of ISDFs on the MICTS website under the “Sector Skills Planning (SSP)” link.

1.14 The MICTS On-Line Grant System

Please note that you must use Internet Explorer.

The web-based On-Line Grant System has been designed to assist Skills Development Facilitators (SDFs)/Independent Skills Development Facilitators (ISDFs) in capturing and submitting Workplace Skills Plan (WSP) and Annual Training Report (ATR) forms electronically. This manual addresses capturing the required forms on the MICTS On-Line Grant System.

Note that the MICTS On-Line Grant System is available all year around, except for the ATR and WSP Reports tab, which is only available from the 1st April to 30th June each year.

When an organisation:
- Changes its SDF/ISDF (also see Section 2.1 below),
- Changes any other organisation contact details,
- Changes its banking details,

the SDF is required to have the information on the MICTS On-Line Grant System amended/updated.

1.15 Acronyms and Definitions

The following acronyms are used within this Reference Manual.

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABET</td>
<td>Adult Basic Education and Training</td>
</tr>
<tr>
<td>ATR</td>
<td>Annual Training Report, reflects the actual data for the past year starting 1st April of the past year to the 31st March of the current year</td>
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<tr>
<td>BBBEE</td>
<td>Broad-Based Black Economic Empowerment</td>
</tr>
<tr>
<td>BEE</td>
<td>Black Economic Empowerment</td>
</tr>
<tr>
<td>Disability</td>
<td>The Employment Equity Act of 1998 defines people with disabilities as ‘people who have a long-term or recurring physical or mental impairment that substantially limits their prospects of entry into or advancement in employment’. Physical impairments include hearing and visual impairments, paralysis, amputations and problems with internal organs. Mental impairment includes clinically defined mental and emotional illnesses and learning disabilities.</td>
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<tr>
<td>DHET</td>
<td>The Department of Higher Education and Training</td>
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<td>ICT</td>
<td>Information and Communications Technology</td>
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<tr>
<td>ISDF</td>
<td>Independent Skills Development Facilitator, has the same responsibilities as an SDF but works as a consultant, i.e. an ISDF is not an employee of the client organisation</td>
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<tr>
<td>Isett</td>
<td>Information Systems, Electronics and Communication Technologies</td>
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<tr>
<td>IT</td>
<td>Information Technology</td>
</tr>
<tr>
<td>L Number</td>
<td>Same as SDL Number, found on your EMP201 form</td>
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<tr>
<td>MICTS</td>
<td>Media, Information and Communication Technologies Seta</td>
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<tr>
<td>NQF</td>
<td>National Qualifications Framework</td>
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<td>NSDS</td>
<td>National Skills Development Strategies</td>
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<tr>
<td>NSF</td>
<td>National Skills Fund</td>
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<tr>
<td>OFO</td>
<td>Organising Framework for Occupations</td>
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<td>SARS</td>
<td>South African Revenue Services</td>
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<td>SASCO</td>
<td>South African Standard Classification of Occupations</td>
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<td>SAQA</td>
<td>South African Qualifications Authority</td>
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<td>SDF</td>
<td>Skills Development Facilitator, someone nominated within the organisation to assume responsibility for gathering and submitting the ATR and WSP data to a Seta</td>
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<td>SDL</td>
<td>Skills Development Levy</td>
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<tr>
<td>Abbreviation</td>
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<tr>
<td>SDL Number</td>
<td>Skills Development Number, found on your EMP201 form</td>
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<tr>
<td>SDLA</td>
<td>Skills Development Levies Act (No. 9 of 1999)</td>
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<tr>
<td>Seta</td>
<td>Sector Education Training Authority</td>
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<tr>
<td>SIC</td>
<td>Standard Industrial Classification</td>
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<tr>
<td>SME</td>
<td>Small and Micro Enterprise. Organisations having 49 or fewer employees.</td>
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<tr>
<td>SOP</td>
<td>Standard Operating Procedure</td>
</tr>
<tr>
<td>SSP</td>
<td>Sector Skills Plan</td>
</tr>
<tr>
<td>the dti</td>
<td>The Department of Trade and Industry</td>
</tr>
<tr>
<td>WSP</td>
<td>Workplace Skills Plan, looks forward, covering the period 1st April of the current year to 31st March of the next year</td>
</tr>
</tbody>
</table>

## 2 Step-by-Step Procedure for the Submission of the ATR and WSP

### 2.1 Step 1: Registering with MICTS as an SDF or ISDF

Please note that you must use Internet Explorer.

If you have already registered with MICTS as an SDF/ISDF, please proceed to Section 2.1.4.

The SDF/ISDF can also approach the MICTS Skills Advisors for assistance. See Chapter 6 for contact details.

#### 2.1.1 Finding the MICTS Homepage

Note that the look of this (Isett) website will change in the near future, as a result of Isett transforming into MICTS.

First time SDF/ISDFs must go to the MICTS website: www.isett.org.za, then click on "Stakeholder Logon" which is situated on the top right hand corner.

![Image](https://via.placeholder.com/150)

The user will then be transferred to the On-Line Grant System Logon page, as presented below.
You will be required to capture your details on the system.

To do this, click on the following icon . This icon directs you to a form that will request your personal details.

2.1.2 Entering Your Personal Details

The form will require your personal details such as your name, surname, ID number, address etc.
At the top of the page, there is a dropdown within which you must specify if you are an SDF or an ISDF.

The form also asks you to enter your username and password onto the form. Please note that this does not mean that you have access onto the system yet. This is because the Advisor at MICTS will have to go through your details and approve or reject your registration.

When you click the “Enter” button at the bottom of the page, the system will direct you to the next form you will need to complete.

2.1.3 Linking Yourself to an Organisation

The second page of the form requires the user to specify which organisations will be linked to the SDF/ISDF.

Note that to link yourself to an organisation; you will be required to know the organisation’s SDL number.

The user has a choice to copy the above document or cancel registration or Register an Organisation.

To link to an organisation, the user must select the “Register an Organisation” icon. This will take you to the screen presented in below.
The user must enter the SDL number of the organisation they will be submitting WSP and ATR forms for, in the “register one or more organisations block.”

Once done, you must upload your letter of appointment, on the letterhead of the client organisation that the SDF/ISDF is representing. An example of this letter is provided in Appendix 2, and is available as a download from your dashboard. The letter of appointment must contain the newly appointed SDF/ISDF contact details and I.D. Number, and must confirm that he/she has been appointed by the Organisation. This letter should be signed by either/or the M.D, the Finance Director or the Human Resource Director. Once this letter has been received, the SDF/ISDF registration will be approved and an automated confirmation email message will be sent to the SDF. The SDF/ISDF will now be able to access the system.

Once done, select the “Finished” button.

Upon completion of the registration process, a confirmation letter is generated, as presented in the figure below. MICTS will then review your application and if satisfactory will approve you as the SDF of your company.

2.1.4 Linking Organisations

Where there is more than one company in a group of companies, SDFs sometimes prefer to submit one ATR/WSP report for all these companies rather than submit a report for each individual company. In this instance, the SDF needs to identify which company is the parent and request MICTS to link the remaining “children” to the parent. The SDF must also request the Finance Department of the parent company to pay all levies against the SDL Number of the parent company, and that no levy contributions should then be made against the children SDL Numbers.

The request for linking of the L Numbers must come to MICTS in the form of a letter on the parent company’s letterhead.
2.2 Step 2: Utilising the Organising Framework for Occupations (OFO)

2.2.1 Overview of the Structure of the Organising Framework for Occupations (OFO)

The OFO has been introduced to simplify and standardise the categorisation of occupations. The OFO is a skill-based coded classification system, which encompasses all occupations in the South African context. The structure of the OFO is presented in the figure below.

With reference to the figure above, note that occupations are categorised according to Major Group (one digit code), Sub-Major Group (two digit code), Minor Group (three digit code), and Unit Group (four digit code). Occupations (six digit code) are subdivisions of the unit groups and can further be broken down into specialisations or jobs.

An example of this structure is shown in the figure below.

As will be noted from both figures above, occupations are further segmented into “Jobs” or “Specialisations”. Hence, it is important to note that a ‘job/specialisation’ and ‘occupation’ are not the same. The following definitions are applied:

- “Occupation” is seen as a set of jobs or specialisations whose main tasks are characterised by a high degree of similarity.
• “Job/Specialisation” is seen as a set of roles and tasks designed to be performed by one individual for an employer (including self-employment) in return for payment or profit.

The occupations identified in the OFO therefore represent a category that could encompass a number of jobs or specialisations.

Occupations are further classified according to skill specialisation, where skill is used in the context of competency rather than a description of tasks or functions.

The skill specialisation of an occupation is a function of the field of knowledge required, tools and equipment used, materials worked on, and goods or services provided in relation to the tasks performed.

2.2.2 NQF Levels versus Secondary and Tertiary Education System

The following table will assist in providing a cross-reference between NQF Levels and academic qualifications.

<table>
<thead>
<tr>
<th>NQF LEVEL</th>
<th>BAND</th>
<th>QUALIFICATION TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td></td>
<td>Post-doctoral research degrees</td>
</tr>
<tr>
<td>9</td>
<td></td>
<td>Doctorates</td>
</tr>
<tr>
<td>8</td>
<td></td>
<td>Masters degrees</td>
</tr>
<tr>
<td>7</td>
<td>HIGHER EDUCATION AND TRAINING</td>
<td>Professional Qualifications</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Honours degrees</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td>National first degrees</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Higher diplomas</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>National diplomas</td>
</tr>
<tr>
<td></td>
<td></td>
<td>National certificates</td>
</tr>
<tr>
<td>4</td>
<td>FURTHER EDUCATION AND TRAINING</td>
<td>Grade 12 (Matric), National certificates</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Grade 11, National certificates</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Grade 10, National certificates</td>
</tr>
<tr>
<td>1</td>
<td>GENERAL EDUCATION AND TRAINING</td>
<td>Grade 9</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ABET Level 4</td>
</tr>
</tbody>
</table>

Professional qualifications include qualifications that are not formally obtained through the DoE or DHET educational system, such as CISCO certification.

2.2.3 Review of New and Changed OFO Codes

In 2011, we are using OFO Code Version 8 for the ATR and Version 9 for the WSP. An analysis has been performed by MICTS on the difference between these two versions, and it seems that only about 30 OFO codes have been impacted in moving from Version 8 to Version 9. This analysis is provided as an Excel file which you can download from your dashboard. If you find that any of your OFO codes are not available on the On-Line Grant System, please refer to this file.

2.2.4 Classification of Personnel into OFO Occupations

The starting point is to first classify all personnel into the various OFO occupations. The OFO classifications are available in the form of an Excel file available on the SDF’s/ISDF’s dashboard.

When using the file, make use of Excel's "Find" function to search on keywords (or parts of keywords) to find the most suitable OFO code. Also think of alternative titles because the file may not have all titles. For example, if you are looking for a procurement officer, also search for “buyer”.

Some Human Resource software application packages do accommodate OFO codes being allocated to personnel. Please enquire with your support centre. If not, it is suggested that you generate a simple spreadsheet along the following lines, in order to start allocating your personnel:
You may wish to expand this spreadsheet to include various other organisation data such as ID Number, Employee Number, etc.

**Please note that “Trainee” is not an occupation.** This person would be training towards an occupation, and it is this occupation that must be specified.

**Note:** If you cannot find an appropriate OFO code for a person in your organisation, please contact the SSP Advisor via email at sharnel.santhilal@isettseta.org.za

Note that the OFO does not distinguish between, for example, a junior programmer and a senior programmer. Level of experience/qualification is yet another dimension that is not fully included within the current OFO, so place both the junior and senior programmers in the same OFO code. When it comes to scarce and critical skills, the NQF level will define the level of experience/qualification.

### 2.2.5 Requesting a New OFO Code or a Change to an OFO Code

If you cannot find an OFO Code that adequately describes the occupation you require, please download the “OFO Updates Template” from your dashboard, complete the form, then email it to seniormanagersssp@isettseta.org.za. Note that this form caters for applying for new OFO Codes, as well changes or additions to existing OFO Codes. It is likely though that a new OFO Code will not be provided until next year, so in the meantime, please select the closest code you can to the occupation you are classifying.

### 2.3 Step 3: Accessing the MICTS On-Line Grant System

Please note that you must use Internet Explorer.

#### 2.3.1 The Need to Access the MICTS On-Line Grant System

SDFs will need to access the MICTS On-Line Grant System for the following purposes:

1. To obtain the latest support information relevant to the ATR and WSP for the current year.
2. To maintain the “Organisation Info” data whenever changes with or in the organisation occur.
3. To capture the ATR and WSP data into the system.
4. To check how much you have contributed and been paid.

#### 2.3.2 Logging On

The SDF/ISDF will go into the On-Line Grant System, as described in Section 2.1.1 and enter his/her username and password. If you have forgotten your logging details, contact SSP Division.
The SDF/ISDF must select the “Skills - Current Year” in the “Logon to” dropdown.

2.3.3 The SDF/ISDF Dashboard

Once you access the system, you will be presented with the following screen. This screen is called the “Skills Development Facilitator Dashboard”.

2.3.4 Explanation of the Screen Icons

The following icons are available in the top left-hand corner of the SDF/ISDF Dashboard.

- Home icon, back to your dashboard.

- The change role icon - this is for people that have more than one role on the system. It will not be a used for SDFs as they normally only have one role on the system.
2.3.5 Selecting the Appropriate Year

In this portion of the screen, the SDF/ISDF can select past years to view the organisations that they were linked to. Using the following facility, the user must select the WSP year and will then select the “Change” icon.

![Screen capture showing the selection of appropriate years]

The previous years are available for reference purposes.

2.3.6 Important Information

Note the “Important Info” block on the right-hand centre part of the screen (shown in the figure below). In this area, you can download all the documentation that will assist you to complete the ATR and WSP. The documents for 2011 will be:

- The SDF/ISDF Reference Manual
- OFO Version 8 list for ATR
- OFO Version 9 list for WSP
- ATR/WSP Template
- OFO New Code/Code Change Request Template
- Example of Letter of Appointment (Word)
- SIC Code per Seta
- ATR/WSP Authorisation Form
- Comparison between OFO Version 8 and Version 9
2.3.7 Dashboard Tools

To the left of “Important Information”, there is a facility for the registered SDF/ISDF to Register (Add) a new employer or remove an existing employer, as well as a facility to change your details.

2.3.8 List of Companies to which the SDF/ISDF is linked

Here the SDF/ISDF will be able to see which organisations he/she is linked to, which organisations the SDF/ISDF has access to, and the status of their WSP and ATR forms on the system.
Please note that as an SDF/ISDF you may have more than one organisation that you are linked to and that you may have access to.

2.4 Step 4: Utilising the MICTS ATR and WSP Template

2.4.1 Introduction

Note that the ATR reflects the actual data for the past year starting 1st April to the 31st March of the current year, whereas the WSP looks forward, covering the period 1st April of the current year to 31st March of the next year.

The ATR/WSP Template is available on the “Important Info” block on the SDFs dashboard.

The ATR/WSP Template is a document that closely reflects what will be seen in the On-Line Grant System, and is provided as an aid to assist SDFs to gather data prior to doing the data capture into the system.

When completing the ATR and WSP, only those employees for whom you pay (or, in the case of potentially new employees, will pay) SDL must be included within the data provided. In terms of defining costs in the training interventions, there are two exceptions to this.

- One exception to the above is that you may include your organisation’s costs for training unemployed learners, on learnerships, within your organisation, and only if these learners are registered on the learnership through MICTS.
- The second exception is bursaries where bursaries are provided for full-time study.
- Just in case there are other exceptions, training of unemployed persons has been accommodated across all training interventions.

2.4.2 Overview Approach to Gathering Data

As a starting point, the SDF/ISDF should review the ATR/WSP Template to see what type of data is requested.

Secondly, the SDF/ISDF should:

- Review the organisation’s business strategy and plan, with an eye particularly on personnel skills and personnel requirements.
- Review the existing personnel and their skills in the workplace (relevant and redundant).
- Determine relevant skills (new personnel or just “top-up” skills) NOT present in the workplace, but that will be required in terms of the business strategy and plan.
- The SDF/ISDF should also take note of the organisation’s employment equity and BBBEE considerations.

Thirdly, utilising the data gathered as suggested in Section 2.2.4, and the ATR/WSP Template:

- Complete the Administrative Details, Organisation Contacts, and SDF Details forms.
- Determine the organisation employment and provincial profile as at 31st March of the current year.
- Determine the occupations at which training took place during the previous year for the ATR, by race, gender, and disability, as well as the cost of these training interventions.
- Determine the occupations at which training will take place during the forthcoming year for the WSP, by race, gender, and disability, as well as the budget of these training interventions.
- Determine the critical and scarce skills needed to fulfil current and future business obligations.

For a description of the types of training interventions, please refer to Section 2.5.15.

Under “Training Interventions”, please note that, for Skills Programmes, Short Courses, ABET/End-User Computing and Bursaries, please indicate the number of interventions per Occupation specified, i.e. if a person does two Short Courses, this is counted as 2.

Additional information on this process is presented in Section 2.5.
2.4.3 Checks and Balances

There are several checks and balances built into the On-Line Grant System, and it would do well at this stage to perform your validation against the following checks and balances.

1) The total number of employees, as reflected in the Employment Profile, must be equal to the total number of employees presented in the Provincial Profile.

2) When specifying the number of persons with disabilities, this number must be less than the sum of male and female.

3) In both the ATR and WSP, the sum of the costs/budgets of all the training interventions is checked against the ATR Training Budget Spent and the WSP Training Budget respectively. If the total of the ATR Training Budget Spent and the WSP Training Budget is less than the sum of the respective training interventions, an error message will appear.

4) When exiting a training intervention, the average cost of that training intervention, per learner, is presented. The SDF is requested to confirm this average, the purpose being to detect errors in data input.

2.5 Step 5: Capturing Data into the MICTS On-Line Grant System

2.5.1 Introduction

Please note that you must use Internet Explorer.

This whole process must be done in consultation with both the employer and the employee. In particular, if the organisation has more than 50 employees a training committee must be set up (see Section 1.11).

When completing the ATR and WSP, only those employees for whom you pay (or, in the case of potentially new employees, will pay) SDL must be included within the data provided. In terms of defining costs in the training interventions, there are two exceptions:

- One exception to the above is that you may include your organisation’s costs for training unemployed learners, on learnerships, within your organisation, and only if these learners are registered on the learnership through MICT.

- The second exception is bursaries where bursaries are provided for full-time study.

- Just in case there are other exceptions, training of unemployed persons has been accommodated across all training interventions.

Note that many SDFs and ISDFs leave the data capture to the last minute. Because of this, there are many people working on the system, and it slows the system down, particularly the closer we get to the 30th June. SDFs and ISDFs are therefore encouraged to capture your data as soon as possible.

SDFs have also complained that they cannot see OFO codes in the dropdowns. Once again, you have to wait for the form to fully download into your PC.

The checks and balances that have been built into the On-Line Grant System, as described in Section 2.4.3, should be noted.

2.5.2 Accessing an Organisation

To access an organisation, select the organisation name shown in the list on the SDF’s dashboard.

2.5.3 The “Organisation Info” Tab

Note that this tab is available throughout the year to SDFs. If any changes occur, please update this tab as soon as the changes occur.

Once the user has accessed the organisation’s database, the following screen is presented.
This is the first tab on the database.

The MICTS data allows the SDF/ISDF to edit and update the organisation’s information. Please note that MICTS relies on the input of this information as being the most recent information. This page is a mandatory page and the system will not allow the user to access the WSP and ATR forms unless this page has been completed.

Department of Higher Education and Training data is available to the SDFs to view the legal name, trade name and registration number of the company. This name must correspond with banking details that are submitted to MICTS.

SIC Code: This can be confirmed from your EMP201 form.

NOTE: If this is the first time that your organisation is claiming Grants under this organisation name and L-number, or if your bank details have changed, please submit a cancelled original of the organisation’s cheque to MICTS, as indicated near the bottom of the Organisation Info page.
Once the SDF/ISDF has updated the information on the organisation information tab, the SDF/ISDF must indicate confirmation of details, by selecting the tick box.

2.5.4 The “Org Contacts” Tab

Note that this tab is available throughout the year to SDFs. If any changes occur, please update this tab as soon as the changes occur.

This screen is for SDFs/ISDFs to capture people that could be a point of contact for the MICTS Advisors. Please make sure that at least two people are added to the contacts list, and must not include the SDF's/ISDF's contacts. Please ensure that the contact people are aware that their details have been added to the database. One of the Organisation Contacts should be from the Finance Department. You can capture as many people as you like. For organisations that have 50 or more employees, include CEO, Finance Manager and HR Executive/Manager.

The system will prompt you to complete and confirm all your Organisation details and contact details before you can access the ATR and WSP forms.

2.5.5 The “Training Committee” Tab

The Training Committee tab is very similar to the Organisation Contacts tab in look and feel. The Training Committee tab applies only to organisations having 50 or more employees. Enter the names and contact details of the training committee members, which will comprise at least one employee representative and either at least one employee representative and/or at least one union representative.

2.5.6 The “SDF” Tab

Note that this tab is available throughout the year to SDFs. If any changes occur, please update this tab as soon as the changes occur.

On the SDF/ISDF screen the user will be able to see the SDF's/ISDF's registration form. The SDF/ISDF can edit and update their information on this page. You may also view the Secondary SDF or the ISDF details by selecting the dropdown box at the top of the page.
2.5.7 The “WSP & ATR Forms” Tab

Note that this tab is available throughout the year to SDFs. However, while you will be able to access the ATR and WSP forms, as described below, you will not be able to edit any of the data except the data relating to the most current Skills Year, and then only during the period 1st April and 30th June. In some instances, MICTS may grant access beyond the 30th June, for the purposes of rectifying errors.

The figure below is the screen that the SDF/ISDF will see once you access the WSP and ATR Forms screen.
2.5.8 Creating a New WSP for a New Year

The section in the top left-hand area of the Screen is only active when a new form needs to be created for a new SDL year. Make sure that your organisation information page and organisation contact are confirmed before creating a new year.

2.5.9 Printing an ATR/WSP Report

The Print Reports option is available on the right-hand bottom area of the screen, and allows you to print the forms that you have completed by clicking on the icon.

2.5.10 Accessing the WSP and ATR Forms

To view and complete the forms, select the icons that are displayed under the heading "ATR Forms" or "WSP Forms". These are displayed by financial year. e.g. [Select 08/09].

2.5.11 WSP Forms

When the SDF/ISDF selects “WSP Forms” for the financial year, the user will be shown the following screen:
Upon confirmation, the following screen will be presented.

![Workplace Skills Plan](Image)

Note the “Submit” button in the figure above.

The SDF/ISDF can now proceed with populating the various forms with data. The ATR/WSP Template, as well as other relevant documents, is available from the SDF’s Dashboard.

Please note that all forms are OFO aligned. This means that you will need to specify the Major Groups, the Sub Major Groups and the Occupations.
2.5.12 The Current Employment Profile

Do not include employees for whom you do not pay SDL. Male and Females must include Disability. Disability must be specified separately: e.g. 3 Male, 2 Female, of which 2 are Disabled.

Use either the Major Group/ Sub-Major Group/Occupation dropdowns to select the occupation or simply type in the 6-digit OFO code.

Gender and Disability must be included: e.g. 3 Male, 2 Female, of which 2 are Disabled.

Definition of Disability: The Employment Equity Act of 1998 defines people with disabilities as ‘people who have a long-term or recurring physical or mental impairment that substantially limits their prospects of entry into or advancement in employment’. Physical impairments include hearing and visual impairments, paralysis, amputations and problems with internal organs. Mental impairment includes clinically defined mental and emotional illnesses and learning disabilities.

Note that, for each row, “Total Male” + “Total Female” = “Age <35” + “Age 35-55” + “Age >55”

The SDF/ISDF can select the Major Group, Sub-Major group and the Occupation using the dropdowns, or just type in the 6-digit OFO Code.

The "Total Annual Cost to Company for all persons in this Occupation" field is compulsory. This must be the total annual cost to company (for the period 1st April 2010 to 31st March 2011), and must include the Cash Component, Car Allowance, Petrol Allowance, Subsistence Allowance, Commission Paid, Bonus, Overtime, Incentive, Provident Fund, Medical Contribution, UIF, WCA, and Skills Levy.

Please note the Age segmentation as well.

The total number of employees on the Provincial Profile page must correspond with the Total on the Employment Profile page. If an error exists when you submit, an error message will appear again and your submission will not be accepted.

2.5.13 The Provincial Profile Form

You are required to complete the staff distribution per province and the number of sites.
2.5.14 Expenses that may be included

Prior to obtaining and completing the details for the Training Interventions, it is important that SDFs/ISDFs have an understanding of what costs can be included.

In defining the costs that can be included in the ATR and WSP, MICTS has decided to adopt the dti’s definition of costs associated with Broad-Based Black Economic Empowerment (BBBEE) measurement of the Skills Development Element. The following is extracted from Government Gazette 29617 of 9 February 2007, “BBBEE Codes of Good Practice”, in particular, “Code Series 400” clauses 3.2 to 3.7. These clauses are stated exactly, but MICT’s comments are added in **Bold Italics**.

3.2 Expenses on scholarships and bursaries for employees do not constitute Skills Development Expenditure if the organisation can recover any portion of those expenses from the employee or if the grant of the scholarship or bursary is conditional. Despite the afore going, if the right of recovery or the condition involves either of the following obligations of the employees, the expenses are recognisable:

3.2.1 The obligation of successful completion in their studies within the time period allocated, [i.e. the learner must complete his/her studies within the allocated time. This clause has probably been included because many organisations contract the learner such that if the learner fails, the learner is responsible those costs, hence there is no cost to the organisation] or

3.2.2 The obligation of continued employment by the organisation for the period following successful completion of their studies is not more than the period of their studies [i.e. if the organisation contracts the learner to work for the organisation for the same period equivalent to the period of study, the cost of study is deemed an acceptable cost to the organisation].

3.3 Any Skills Development Expenditure by an organisation that is an ABET programme is recognisable at a multiple of 1.25 to the actual value of such Skills Development Expenditure [In the case of reflecting ABET costs in the WSP or ATR, the SDF is required to determine your costs (budget), multiply it by 1.25, and provide the resulting figure. In other words, MICTS will assume that the data provided by the SDF has been factored up. Also note that, in terms of MICT, the terms of this clause also applies to End-User Computing.]

3.4 Skills Development Expenditure includes any legitimate expenses [including training expenses of training done outside of South Africa] incurred for any Learning Programme offered
by an organisation to its employees evidenced by an invoice or appropriate internal accounting record.

3.5  Skills Development Expenditure arising from Uncertified Learning Programmes or from Category G Learning programmes under the Learning Programmes Matrix cannot represent more than 15% of the total value of Skills Development Expenditure [With regard to your MICTS WSP/ATR, include the full 100%].

3.6  Legitimate training expenses include:

3.6.1  Costs of training materials
3.6.2  Costs of trainers
3.6.3  Costs of training facilities including costs of catering
3.6.4  Scholarships and bursaries
3.6.5  Course fees
3.6.6  Accommodation and travel and
3.6.7  Administration costs such as the organisation of training including where appropriate the cost to the organisation of employing a skills development facilitator or a training manager.

3.7  Salaries or wages paid to an employee participating as a learner in any Learning Programme only constitute Skills Development Expenditure if the Learning Programme is a Learnership or falls within category B, C or D of the Learning Programme Matrix.

The following table provides the definition of the various learning programmes, as per the dti Learning Programme Matrix, with cross-reference to the DHET Appropriate Learning Strategies presented in the Table in Section 2.5.17.4.

<table>
<thead>
<tr>
<th>Type of Learning Programme</th>
<th>Delivery Mode</th>
<th>Learning Site</th>
<th>Learning Achievement</th>
<th>The DoL Appropriate Learning Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Institution-based</td>
<td>Institutional</td>
<td>Institution, such as universities and colleges, schools, ABET providers</td>
<td>Recognised theoretical knowledge resulting in the achievement of a degree, diploma or certificate issued by an accredited or registered formal institution of learning</td>
<td>Ed</td>
</tr>
<tr>
<td>theoretical instruction</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>alone – formally assessed</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>by the institution</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Institution-based</td>
<td>Mixed mode</td>
<td>Institution such as universities and colleges, schools, ABET providers and workplace</td>
<td>Theoretical knowledge and workplace experience with set requirements resulting in the achievement of a degree, diploma or certificate issued by an accredited or registered formal institution of learning</td>
<td>TQ,TP</td>
</tr>
<tr>
<td>theoretical instruction</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>as well as some practical</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>learning with an employer</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>or in a simulated work</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>environment – formally</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>assessed through the</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>institution</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Recognised or registered</td>
<td>Structured</td>
<td>Workplace</td>
<td>Occupational or</td>
<td>I,A,L</td>
</tr>
<tr>
<td>structured experiential</td>
<td>learning in the workplace with mentoring or coaching</td>
<td></td>
<td>professional knowledge and experience formally recognised through registration or licensing</td>
<td></td>
</tr>
<tr>
<td>learning in the workplace</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>that is required after the</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>achievement of a</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>qualification – formally</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>assessed by a statutory</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>occupational or</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>professional body</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type of Learning Programme</td>
<td>Delivery Mode</td>
<td>Learning Site</td>
<td>Learning Achievement</td>
<td>The DoL Appropriate Learning Strategies</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------------</td>
<td>---------------</td>
<td>-----------------------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td>D. Occupationally-directed instructional and work-based learning programme that requires a formal contract – formally assessed by an accredited body</td>
<td>Institutional instruction together with structured, supervised experiential learning in the workplace</td>
<td>Institution and workplace</td>
<td>Theoretical knowledge and workplace learning, resulting in the achievement of a SAQA registered qualification, a certificate or other similar occupational or professional qualification issued by an accredited or registered formal institution of learning</td>
<td>Ls,Ap</td>
</tr>
<tr>
<td>E. Occupationally-directed instructional and work-based learning programme that does not require a formal contract – formally assessed by an accredited body</td>
<td>Structured, supervised experiential learning in the workplace which may include some institutional instruction</td>
<td>Workplace and some institutional as well as ABET providers</td>
<td>Credits awarded for registered unit standards</td>
<td>SP</td>
</tr>
<tr>
<td>F. Occupationally-directed instructional programmes</td>
<td>Structured information sharing or direct instruction involving workshops, seminars and conferences and short courses</td>
<td>Institutions, conferences and meetings</td>
<td>Continuing professional development, attendance certificates and credits against registered unit standards (in some instances)</td>
<td>SC,CPD</td>
</tr>
<tr>
<td>G. Work-based informal programmes</td>
<td>Informal training</td>
<td>Workplace</td>
<td>Increased understanding of job and work context or improved performance or skills</td>
<td>WE</td>
</tr>
</tbody>
</table>

Also note:

- You may only include your organisation’s costs for training learners against whom your organisation is contributing SDL levies. In terms of defining costs in the training interventions, there are two exceptions to this.
  - One exception to the above is that you may include your organisation’s costs for training unemployed learners, on learnerships, within your organisation, and only if these learners are registered on the learnership through MICT.
  - The second exception is bursaries where bursaries are provided for full-time study.
  - Just in case there are other exceptions, training of unemployed persons has been accommodated across all training interventions.
  - Because MICTS already reports expenditure on training programmes using its discretionary budget, organisations must reduce “its expenditure” by any funding from sources external to your organisation (such as MICT).
  - Please retain records of your cost determinations in case MICTS needs them for verification with the Auditor General.

If there are other costs not included above that you are unsure of, please contact us. Although we are now following the dti methodology, we will try to assist you.
The Training Interventions Planned Forms

These forms apply the same methodology as the Current Employment Profile. The SDF/ISDF will select the Major Group, Sub-Major Group and the Occupation and capture the title of the training programme, as well as the budget.

The SDF/ISDF can select the Major Group, Sub-Major group and the Occupation using the dropdowns, or just type in the 6-digit OFO Code.

In each of the training intervention forms described below, after adding the details for each occupation, click “Back to Forms Page” near the top left hand corner. A check message will then appear, asking you to confirm the average budget per learner, which is calculated as the total budget for these training interventions divided by the total number of interventions/learners for this type of training intervention.

The Training Interventions have been categorised according to the most common types:

- **The Learnerships 18.1 Table** applies to employees on a registered Learnership. This form should remain blank if there are no such learners in the organisation.
  
  Please indicate the number of beneficiaries per Learnership. Exclude ABET and End-User Computing.
  
  Note that, for each row, “Entry Level” + “Intermediate Level” + “Advanced Level” = “Total Male” + “Total Female”

- **The Learnerships 18.2 Table** applies to non-employees and unemployed learners on a registered Learnership. This form should remain blank if there are no such learners in the organisation.
  
  Please indicate the number of beneficiaries per Learnership. Exclude ABET and End-User Computing.
  
  This is one of the two forms where an organisation reports on training of learners against which the organisation is not paying Skills Development Levies.

- **The Internships Table** applies only to learners on internships that have completed a formal qualification like a National Diploma or Degree, and are undergoing formal experiential training in the workplace and also receive other formal occupational training at recognised training institutions. This form should remain blank if there are no such learners in the organisation.
This data entry form is similar to the Learnership forms, except that you need to also state how many learners are employed and how many are unemployed.

- **The Skills Programmes Table** is to be completed only with reference to the number of training interventions that will be or are being conducted against registered Unit Standards at an Accredited Training Institution, and the training programme must include a workplace component. This data entry form similar to the Learnership forms, except that you need to also state how many interventions are for employed personnel and how many interventions are for unemployed personnel.

Please indicate the number of Skills Programmes (interventions) per Occupation, i.e. if a person does two skills programmes, this is counted as 2. Exclude ABET and End-User Computing.

- **The Short Courses Table** should reflect the number of training interventions, which may or may not lead to credits towards an NQF registered qualification. Short Courses have no workplace training component. It includes all interventions where skills transfer takes place like Product Specific Training, Workshops, Conferences, Seminars, Mentoring, Organisation Specific Training, skills development meetings, etc. The evidence that you need to retain as proof of training will include professional qualifications (e.g. Cisco certification), signed attendance certificates/registers, and credits against registered unit standards (in some instances). This data entry form is similar to the Learnership forms, except that you need to also state how many interventions are for employed personnel and how many interventions are for unemployed personnel.

Please indicate the number of Short Courses (interventions) per Occupation, i.e. if a person does two skills programmes, this is counted as 2. Exclude ABET and End-User Computing.

- **The ABET/End User Computer Training Table** (presented in Error! Reference source not found. below) must reflect only formal training interventions at accredited institutions which will result in learners achieving NQF credits. The only exception applies to Learners acquiring a recognised/formal Microsoft (MOUS), ICDL, ECDL, or equivalent End User Computing Qualification.

This form is similar the previous forms except that it also requests differentiation between ABET and End-User Computing, and the NQF Level at which the training takes place.
Please indicate the number of ABET/End User Computer Training Programmes (interventions) per Occupation, i.e. if a person does two skills programmes, this is counted as 2.

- **The Bursaries Table** is the other of the two forms where an organisation can report on training of learners against which the organisation is not paying Skills Development Levies.

This form is similar to the previous forms except that it also requests the type of learning programme that the bursar will be involved in. These types of learning programmes are described in Section 2.5.17.4 below.

Please indicate the number of Bursaries (interventions) per Occupation, i.e. if a person has two Bursaries, this is counted as 2.

The following points, raised by SDFs and ISDFs in the past, may also assist:

- Can teambuilding be reported as a learning intervention? No. The employees may come away from such an event with a greater sense of team camaraderie and willingness to work better together, but it is unlikely that they earn new skills that would beneficial to their occupation.

- We have an employee who is studying his diploma in Electrical Engineering. He works for us for 6 months and then studies for 6 months. Would this be considered a learnership or internship? The 6 months he works for you would be viewed as workplace experience in support of his studies. This should be viewed as internship.

- What would our assisted study employees be considered as? Many of them are studying towards a higher diploma or degree. Allocate these costs to bursaries, as long you are not claiming the bursaries back from the learner.

- If I have a project team of 5 people and each of these people have been on 5 various courses throughout the year, do I report on it as just 5 people or as 25 people? 25 training interventions.

### 2.5.16 The “Training Budget” Form

On this form you need to complete your Organisation’s training budget for the current year.

**Note** that this training budget must be equal to or greater than the sum on the various training interventions; otherwise a pop up screen will specify a message telling the SDF/ISDF that an error exists here. The reason why this total can be greater than the sum of the training interventions is that if you have not spread the costs of, for example, the SDF across the training interventions, you can include these costs in the above figure.

Click “Enter” once you have entered the figure.

### 2.5.17 The Scarce and Critical Skills Forms

**Scarce skills** represent a demand for personnel currently unavailable for occupations in organisations. Scarce skills therefore represent opportunities for unemployed people.

**Critical skills** represent the demand for learning programmes for currently employed personnel. They are therefore top-up skills required by currently employed people within the organisation.
The following figure shows the Critical Skills Form in the On-Line Grant System. The Scarce Skills Form is very similar to the Critical Skills Form. The following sub-sections describe how to complete the various fields in these forms.

Include ABET and End-User Computing if applicable.

### 2.5.17.1 Major Group, Sub-Major Group and Occupation

The SDF/ISDF can select the Major Group, Sub-Major group and the Occupation using the dropdowns, or just type in the 6-digit OFO Code.

### 2.5.17.2 Specialisation/Job

If specialisation training is required within the occupation, select the specialisation/job from the dropdown list available. This list of specialisations is also available in the “OFO” Excel file on your dashboard.

### 2.5.17.3 Critical Skills

If particular or specific skills are critical to the occupation to ensure competence and competitiveness, type the skill(s) into the text box. Critical skills can refer to cognitive skills (problem solving, learning to learn), language and literacy skills, mathematical skills, ICT skills, working in teams etc. It can also refer to technical top up skills related to the specific occupation.

The Critical Skills field is a free text field. You need to provide specifics on the critical skills that will be addressed. Please do not include comments such as “this is a very critical skill”.

### 2.5.17.4 Intervention

Use the dropdown list to identify the most appropriate learning strategies to address the critical skills identified against the occupation. The options and additional information to assist in identifying the most appropriate learning strategy are presented in the table below.

<table>
<thead>
<tr>
<th>Learning Programme Types</th>
<th>Abbreviation</th>
<th>Description</th>
<th>Learning Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generic Diplomas Degrees Certificates</td>
<td>Ed</td>
<td>Theoretical knowledge provided by an institutional provider</td>
<td>Classroom based</td>
</tr>
<tr>
<td>Technical Qualifications Technical</td>
<td>TQ, TP</td>
<td>General theoretical knowledge provided by an institutional provider and experiential learning with an employer or simulated</td>
<td>Mainly classroom based but includes simulation and may</td>
</tr>
<tr>
<td>Learning Programme Types</td>
<td>Abbreviation</td>
<td>Description</td>
<td>Learning Site</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------</td>
<td>-------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Programmes</td>
<td></td>
<td>Environment</td>
<td>include workplace learning</td>
</tr>
<tr>
<td>Internship Articles Licensing requirements</td>
<td>I A L</td>
<td>A workplace or practical component is required in addition to a general theoretical knowledge based qualification (institutional provider) in order to obtain registration as a professional or licensed to practise</td>
<td>A compulsory or statutory workplace component of a qualification</td>
</tr>
<tr>
<td>Learnerships Apprenticeships (Section 13)</td>
<td>Ls Ap</td>
<td>An occupationally directed programme resulting in a registered qualification and that requires an agreement and/or contract</td>
<td>Mainly workplace based but includes classroom learning</td>
</tr>
<tr>
<td>Skills Programmes</td>
<td>SP</td>
<td>An occupationally directed programme, registered by a Seta, which is presented by an accredited provider and when completed will constitute a credit towards an NQF registered qualification</td>
<td>Workplace and classroom</td>
</tr>
<tr>
<td>Short Courses Continuing Professional Development</td>
<td>SC CPD</td>
<td>Any learning or development programme that may or may not lead to credits towards an NQF registered qualification</td>
<td>Classroom or simulated or classroom and simulated</td>
</tr>
<tr>
<td>Work experience for unemployed graduates (in scarce skills)</td>
<td>WE</td>
<td>Work experience provided by a workplace for unemployed graduates (in scarce skills)</td>
<td>Workplace only</td>
</tr>
</tbody>
</table>

### 2.5.17.5 NQF Level

Using the dropdown list provided, indicate the appropriate NQF level (real or estimated) at which the intervention should be directed. This field is to be completed irrespective of whether or not NQF aligned interventions are available. If no interventions exist or if the existing interventions are not NQF aligned, an estimation should nevertheless be made.

Please also refer to the relationship between NQF levels versus secondary and tertiary levels in Section 2.2.2.

### 2.5.17.6 NQF Aligned – Y/N

Enter “Y” if the most appropriate intervention method identified at “NQF Level” is NQF aligned. If not, enter “N”.

### 2.5.17.7 Need

**For Critical Skills**, please provide the total number of training interventions is required. **For Scarce Skills**, please provide the total number of people required. Four fields of entry are presented, the first to indicate the immediate need, followed by three for each of the three years indicated.

**For Critical Skills**, in the “Immediate” field, indicate the number of training interventions required right now. Note that this number of training interventions must be excluded from the number placed in the subsequent “Need” fields (i.e. to avoid double-counting).

**For Scarce Skills**, in the “Immediate” field, indicate the number of people required right now, i.e. this number will indicate the number of current “hard to fill” vacancies, as described in Appendix 3. Note also that this number of people must be excluded from the number placed in the subsequent “Need” fields (i.e. to avoid double-counting).

With regard to scarce skills, note that the MICTS has a database of unemployed persons. Please use this on-line database to see if you can utilise any of these people.

To use the on-line database, go to our website, [www.isett.org.za](http://www.isett.org.za), go to “Placement”, “Organisation Login”, then register yourself and you will immediately gain access. There is also a search engine to assist you. If you experience any difficulties with this system, please contact Ernest Nemugavhini, Learnership Data Administrator, 011 207 2633 or ernest.nemugavhini@isettseta.org.za.
2.5.17.8 Comments
Any specific explanations, requirements or specifications can be provided in the Comments section. Examples include:

- Additional specialisations that your organisation has that are not included in the OFO.
- Where you have difficulty in relating an occupation in your organisation to those in the OFO, find the closest occupation you can in the OFO, then suggest a new occupation under “Comments”.

On completion of capturing all the relevant data for the occupation, click "Add". A check message will then appear, asking you to confirm, in the case of Critical Skills, “Your total need for Top-Up Skill interventions for this occupation, divided by your total number of current employees”. In the case of Scarce Skills, the system will request you to confirm “Your total need new staff for this occupation, divided by your total number of current employees”.

2.5.18 The “Annual Payroll” Form
Enter the Total Annual Payroll for all employees for whom you pay SDL for the period 1st April 2010 to 31st March 2011, the click “Enter”.

2.5.19 The Annual Training Forms
When the SDF/ISDF selects “ATR Forms” for the most recent Skills Year, the user will be shown the screen as presented below.

These forms are very similar to the WSP forms mentioned previously, except that actual data relating to the most recent Skills Year must now be specified.

2.5.19.1 HIV/AIDS
Please answer these questions as best as you can.
2.5.19.2 Variance Report

Note that this form will not need to be completed by those companies submitting now for the first time (since new companies only complete the WSP in their first year).

Where the ATR 2010 differs from the WSP 2010 data that was provided last year, you will be required to provide a reason for this difference, using the dropdowns available. You can select up to three reasons from the dropdown, using the “Ctrl” key.

The range of Reasons presented by the system is:

<table>
<thead>
<tr>
<th>Reason</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Constraints</td>
<td>Change in Company Objectives</td>
</tr>
<tr>
<td>Change in Main Business Activities</td>
<td>Change in Ownership</td>
</tr>
<tr>
<td>Change in Technology</td>
<td>Could not acquire appropriate new personnel</td>
</tr>
<tr>
<td>Could not secure appropriate dates with training provider(s)</td>
<td>Down Sizing</td>
</tr>
<tr>
<td>Economic Downswing</td>
<td>Economic Upswing</td>
</tr>
<tr>
<td>Industrial Relations</td>
<td>Internal Restructuring</td>
</tr>
<tr>
<td>Merger(s)</td>
<td>New Contract(s)</td>
</tr>
<tr>
<td>Other</td>
<td>Staff Turnover</td>
</tr>
<tr>
<td>Time Constraints</td>
<td>Up Sizing</td>
</tr>
</tbody>
</table>
2.5.20 The Document Uploads Tab

The “Document Uploads” Tab allows the SDF or ISDF to upload the signed Authorisation Form, and, if available, the organisation’s BEE certificate. Once MICTS Advisors have checked that the fully signed Authorisation Form is present in the system, your submission status will be moved from “Submitted” to “Approved”.

Please note the following points:

- The document you are about to upload must be saved in a known folder on your PC or LAN.
- When you upload, make sure you have selected the correct period under “Years available”.
- Uploading the BEE Certificate is optional but recommended, and you can also (or instead) upload your self-assessment.
- If you incorrectly upload a document, please email the details to the SSP Advisor at sharnel.santhilal@issettseta.org.za, who will assist by deleting the particular record.

The following figure shows what will be presented when the “Document Uploads” tab is clicked.

Depending on which document you are uploading, click on the appropriate “Browse” button, locate the document in whichever folder it is saved on your PC or LAN, then click “Save”. The document will then be uploaded into the On-Line Grant System.
2.6 Step 6: Extensions, Submission and Approval

2.6.1 Extensions for ATR/WSP Submission

In terms of the relevant regulations, requests for extensions of submission may be entertained by the Seta. Note though that the request for extension must be submitted to MICT, either in writing or via email, providing the reasons for the requested extension. Only in extreme situations, MICTS may consider granting an extension. The reason for this is that the Auditor General is very strict on the legalities of this process, namely that ATRs and WSPs must be submitted by the 30\textsuperscript{th} June each year, and three months is allowed for this process (from 1\textsuperscript{st} April to 30\textsuperscript{th} June).

The penalty for late submission is losing your mandatory grant in full. The only exception to this is where a mandatory grant application is submitted within 6 months of registration in the case of an employer who has registered for the first time in terms of section 5(1) of the Skills Development Levies (SDL) Act.

2.6.2 Submission of ATR/WSP

Note that when you are ready to submit, all the ATR and WSP data must have been captured, and at least your fully signed Authorisation Form (available from your dashboard) must have been uploaded. When you click the “Submit” button, both the ATR and the WSP are submitted into the system.

Note also that if you submit your ATR and WSP using the on-Line Grant System, there is no need to submit a paper version as well. You must however retain a copy for your own records, with each page initialled and the fully signed Authorisation Form. Besides the SDF, the Authorisation Form must be authorised by one of the following people: CEO, CFO, MD, Director, Owner, HR Executive (not HR Manager), as well as a member of the Training Committee if your organisation has 50 or more employees. If MICTS audits your organisation, these documents may be called for.

On completion of entering all data, the SDF/ISDF must click the “Submit” button. To access the “Submit Button”, click on the “WSP & ATR Forms” tab, and then click on the “WSP Form” button for the current Skills Year (see Section 2.5.11 for the location of the Submit button).

When you submit, if there are still errors in the data, the SDF/ISDF will be informed of these. Once rectified, clicking the “Submit” button will result in the On-Line Grant System formally accepting all the data, and the organisation will be granted “Submitted” status.

2.6.3 Approval (Submission of Signed Authorisation Form)

“Approved” status will be granted once the MICTS Advisors have checked that the fully signed Authorisation Form has been uploaded.

SDFs will be informed, via e-mail, when the ATR and WSP have been approved. Approval implies that MICTS is happy with the data submitted by the SDF/ISDF, and will be paying the Mandatory Grant back to the stakeholder organisation.

2.7 Grant Payment Schedule

The following table illustrates the MICTS grant payment schedule.

As an example, if you submitted by end June 2011, you will be receiving 40% back on what you have contributed since 1\textsuperscript{st} April 2011, paid quarterly. Your first payment that you receive will be 40% of your 1\textsuperscript{st} April 2011 to 30\textsuperscript{th} June 2011, which should be paid to you in September/October 2011 (monies received from DHET/SARS permitting).

Note that the MICTS year starts on the 1st April.
3 On-Line Grant System Utilities

Please note that you must use Internet Explorer.

3.1 The “Grants and Levies” Tab

Note that this tab is available throughout the year to SDFs.

The Grants and Levies tab provides SDFs/ISDFs with information on what levies have been contributed to SARS and what grants have been paid by MICTS back to the organisation concerned.

This screen allows the SDF/ISDF to view their Financial Statement Summary and/or their Grants and Levies.

To view the financial statement summary, the SDF/ISDF will select and then select the respective financial year, followed by “Enter”.
The figure above displays the grants that the Organisation has received from MICTS, showing the date that the grants were received, the description and the amount.

The SDF/ISDF can then either Print the page, or view the Levies and Benefits by selecting the icons at the bottom of the screen.

If the SDF/ISDF selects the Levies, icon the system will display the following screen.
The figure above displays the levy information and a breakdown of the funds that the Organisation contributed to SARS.

This screen also has a print option.

3.2 The “Associate SDF” Tab

Note that this tab is available throughout the year to SDFs.

This tab displays SDFs who have registered to be that specific organisation’s SDF/ISDF on the system. This will display the status of previous SDFs on the system and also their status in terms of the access they have on the system, as well the SDF/ISDF role.
Please note that, in terms of accessing the system and editing the data, only one SDF/ISDF can do this, hence there can be only one active SDF/ISDF. However, there can also be one or more secondary SDFs/ISDFs who will be able to access the system on a “read-only” basis.

4 Other Important Points to Note

4.1 Correspondence with the MICTS SSP Division

Please correspond with the MICTS SSP Division by email. We need to maintain records of the assistance we provide to our stakeholders, and the issues covered.

4.2 Support from the MICTS SSP Division

As mentioned above, the purpose of this Reference Manual is to assist SDFs and ISDFs, as well as to alleviate the load on this Division. Many times MICTS is called with such queries as “Can I fax the authorisation form?” or “Does the employee representative really need to sign the authorisation form?” Hopefully, all these issues, and many others, have now been addressed in this Manual.

Over and above the information presented in this Manual, the MICTS SSP Division will continue providing the following services:

- If you are an SDF or ISDF associated with MICTS stakeholders, and you are unsure which Seta a new client belongs to, please contact one of the MICTS SSP Advisors.
- Inter-Seta Transfers. The relevant documentation is available on the MICTS website, www.isett.org.za, under the Sector Skills Planning (SSP) link. The IST01 form must be completed, with your request for transfer on the organisation’s letterhead, and emailed to one of the MICTS SSP Advisors. The full MICTS procedure is presented in Appendix 5.
- Technical queries regarding the On-Line Grant System. MICTS will log your query with our On-Line Grant System service provider and will keep you informed of developments. Please first refer to “Troubleshooting”, Section 5.
• Participation Confirmation Letters. Occasionally when organisations bid on government contracts, they are requested to provide a letter confirming that they are contributing Skills Development Levies and/or that their ATR/WSP has been approved by their Seta. MICTS assists with this service for its stakeholders. The full MICTS procedure is presented in Appendix 5.

• Grant Payment Queries. Please address these queries to sharnel.santhilal@isettseta.org.za.

• Requests for extensions for ATR/WSP submission. Please email the Senior Manager: SSP at seniormanagersssp@isettseta.org.za. Please note Section 2.6.1.

• Registering a new company with a Seta. Please refer to Appendix 6.

• Approving new SDFs and ISDFs.

• Assisting with forgotten username and password.

4.3 **SDF/ISDF Telephonic and/or Person-to-Person Training**

MICTS offers telephonic and/or person-to-person training on the On-Line Grant System to new SDFs and ISDFs. Should you feel you need such training, please contact one of the MICTS SSP Advisors via email.

4.4 **MICTS SSP Division Service Levels**

Regarding SDF procedural queries and complaints, assistance to register and approval thereof, assistance with Inter-Seta transfers and registration of new companies, the MICTS SSP Division will strive to resolve these issues within 8 working hours. In some instances, time to resolve will be beyond our control, for example where we are dependent on SARS and the DHET in some processes.

With regard to SDF technical queries and complaints, the MICTS SSP Division will strive to resolve these issues within 24 working hours.

Note that MICTS will be requesting you, on an annual basis, to score us on these various areas so that we can identify and rectify any problem areas.

4.5 **New Organisations**

The WSP of newly registered organisations must be submitted within 6 months of establishment. In this case, only the WSP must be completed in the first year.

4.6 **Paper Submission of ATRs/WSPs**

Instead of submitting data on-line, organisations can submit their ATR/WSP in printed form using the ATR/WSP Template by the 30th June. However, the organisation will be required to capture their data on-line by a date set by MICTS after the 30th June.

4.7 **Linking of Organisations**

Where a group of companies wishes to submit one ATR/WSP for the group, rather than individual ATRs/WSPs for each company, companies can be linked on the On-Line Grant System to make this possible. If you wish to do this, please contact one of our MICTS SSP Advisors for assistance.

4.8 **Changing your Banking Details**

If your organisation changes its banking details, it is crucial the MICTS be informed, that the On-Line Grant System be updated, and that a new cancelled cheque be uploaded into the On-Line Grant System or delivered to our offices.

4.9 **MICTS Audits**

Please note that MICTS will be conducting a sample audit on organisations submitting ATRs and WSPs. Please keep all your working documents.

4.10 **SDF/ISDF Training Workshops**

Once a year, usually around February, MICTS conducts a series of workshops in Gauteng, Durban, East London and Cape Town. At these workshops, SDFs and ISDFs are guided through the latest version of the On-Line Grant System and the Career Guide, as well as addressing any other queries.
or concerns that SDFs and ISDFs may have. SDFs and ISDFs will be informed of these events via email. SDFs, ISDFs and other interested personnel in the MICTS stakeholder companies are encouraged to attend these workshops.

4.11 Courseware Offered by Training Providers

MICTS has a list of MICTS-accredited training providers on its website at www.isett.org.za, under the Education and Training Quality Assurance (ETQA) link. If you are looking for any particular courseware, it is suggested that you contact these training providers. MICTS cannot be seen to be supporting any one particular training provider.

4.12 How the MICTS will be using the ATR and WSP data submitted

The ATR/WSP is used by MICTS to:

- determine imbalances in the supply of, and demand for, skilled labour;
- support the National Skills Development Strategy that must be demand-led and sensitive to the labour market needs;
- the disbursement of levy funds to eligible employers, through the Levy Grant System.

The ATR data enables MICTS to determine the actual training that has been conducted within its stakeholder organisations. This data is assessed against the WSP data of the previous year to determine the extent to which organisations are meeting their planned objectives. MICTS uses this analysis to respond to shortfalls through the annual review of its budgets.

The WSP data is used by MICTS to plan its own annual targets, which become its annual commitments to the Department of HET, via a Service Level Agreement. Overstatement by organisations in their WSP targets will therefore negatively impact on the MICTS. In order to achieve its targets, MICTS will assess which organisations are contributing to the MICTS targets, and approach those organisations to negotiate a partnership where MICTS will partly fund the training. Note that in the past, MICTS acted on Letters of Intent to effect partnerships. MICTS will now act on WSP inputs. Where MICTS needs to achieve additional targets, Letters of Intent will still be utilised.

If you would like the template for the Letter of Intent, please visit our website, www.isett.org.za or contact the MICTS Senior Manager: Learning Programmes on 011 207 2600.

4.13 Allocation of Discretionary Grants by Seta

This section is important for SDFs/ISDFs to understand the criteria required to get funding from MICTS.

MICTS may determine and allocate a discretionary grant:

- To fund research in the sector in accordance with the sector skills plan and guidelines prepared by the department;
- To fund the development of guidelines and training of sector specialists or persons involved with skills development facilitation;
- To fund a qualifying employer or an accredited organisation in respect of adult basic education and training provided to a learner;
- To fund a training provider or employer in respect of a learner who enters a learning programme to acquire a scarce or critical skills identified by the Seta through the ATR/WSP process;
- To fund an employer who provides work experience opportunities to learners in sector relevant programmes;
- To fund an employer or training provider to train and mentor learners to acquire a new venture qualification;
- to fund an institution of sectoral or occupational excellence;
- To fund an institution that offers the new venture qualification to learners;
• To fund an education and training provider or an institution responsible for the implementation of the national qualifications framework in support of the national skills development strategy;
• To fund Seta constituency capacity building initiatives and promotion of skills development in the sector;
• To fund a lead employer which forms part of the learnership regulation;
• To fund an agency established in terms of S17(7) of the Act;
• To fund an employer for learnerships registered under a different Seta;
• To fund a stakeholder in respect of sector skills priorities.
• For training layoff

These grants are paid and thus funded from:
• 20% of the total levies paid by the employer for each financial year;
• surplus administration;
• unclaimed mandatory grants;
• interest and penalties received;
• interest earned on investment;
• surplus contributions received from public service employers;
• Any other money received by Seta.

5 Troubleshooting

5.1 Blank Screen When Trying to Log into the On-Line Grant System

The reason for this is that you have pop-ups blocked. If you experience this, you will see a message at the top of your screen that will allow you to unblock the pop-ups.

Alternatively, hold down the “Crtl” key when before you click on the button and hold this key down until the new page appears.

Alternatively, there is a pop-up blocker on your PC, either by a Google Bar installed on your machine, or through a setting on your internet browser. Please follow the next steps to disable the pop-up blocker.

The MICTS On-Line Grant System is a web-based system. In some instances, the system uses Pop-up blocks to give you an important message. If your machine does have a pop-up blocker, you will need to turn the pop-up blocker off, only for these pages.

Pop-up blockers can be installed on your machine in at least the following two instances:

1. Windows Internet Explorer settings
2. Google bar /Yahoo bar /Hotbar

To uninstall the above follow the next steps:

1. Windows Internet Explorer Settings.

Step 1: Open Internet Explorer

Step 2: Click on Tools

Step 3: Select Pop-up Blocker
Step 4: Select the “Turn Off Pop-up Blocker”

2. Google Toolbar/ Yahoo bar/ Hotbar

The Google toolbar has its own built-in pop-up blocker. To turn off the pop-up blocker, you need to uninstall the Google toolbar by following the next steps.

Step 1: Click on the Windows “Start” Button (bottom left-hand corner of your screen).

Step 2: Select “Control Panel”

Step 3: Click on the “Add/Remove Programmes” option

Step 4: Scroll down on the list of programmes installed on your PC until you find the “Google Toolbar for Internet Explorer” application.

Step 5: Click on the “Remove” button, to uninstall this application.

5.2 Use of Firefox

Please note that you must use Internet Explorer.

5.3 On-Line Grant System Very Slow

Note that many SDFs and ISDFs leave the data capture to the last minute. Because of this, there are many people working on the system, and it slows the system down, particularly the closer we get to the 30th June. SDFs and ISDFs are therefore encouraged to capture your data as soon as possible.

5.4 Cannot See OFO Codes in the Dropdowns

SDFs have also complained that they cannot see OFO codes in the dropdowns. Once again, you have to wait for the form to fully download into your PC.
5.5 **Cannot Log Into the On-Line Grant System**

This happens, if the user has registered a number of times as an SDF. The system will block the users registration. You will have to contact an SSP Advisor via email (see Section 6).

5.6 **Error AUTHENTIFICATION NEEDED**

This will occur if you leave your workstation for too long. You need to log-in again.

6 **How to Contact the MICTS**

6.1 **For ATR/WSP Queries**

The persons at MICTS dealing with the reports and queries are Elelwani Netshituni (Millicent) and Sharnel Santhilal.

Their telephone numbers are (011) 207 2625 and 207 2632 respectively.

Email: sharnel.santhilal@isettseta.org.za; sharnel.santhilal@isettseta.org.za.

6.2 **For Financial Queries**

With regards to financial queries, please first refer to the “Grants and Levies” tab on the On-Line Grant System. If this does not assist to resolve your query, contact Sharnel Santhilal at sharnel.santhilal@isettseta.org.za.

6.3 **MICTS National Contact Numbers**

- **Midrand Head Office**  Tel: (011) 207 2600, Fax: (011) 805 6833
- **Cape Town**  Tel: (021) 461 3926, Fax: (021) 461 3939
- **KwaZulu-Natal**  Tel: (031) 307 7248, Fax: (031) 307 5842
- **East London**  Tel: (043) 726 0763, Fax: (043) 726 0790
Appendix 1: Legislative Requirements

Note that these requirements are about to be changed to some extent.

In the interest of all our stakeholders and to ensure that all interested parties are well informed, we present an extract from the Government Gazette No. 27801, Vol. 481, published on 18 July 2005, and as amended by Amendments to Sector Education and Training Authorities (Setas) Grant Regulations Regarding Monies Received by a Seta and Related Matters, November 2006. These extracts deal specifically with Mandatory Grants and it is advisable that especially SDFs are aware of these regulations.

Role of the Annual Training Report (ATR) and Workplace Skills Plan (WSP) in the National Skills Development Strategy (NSDS)

The Context for the Workplace Skills Plan

The vision of the current National Skills Development Strategy 2005-2010 (NSDS II) is:

Skills for Sustainable Growth, Development and Equity

The mission statement of NSDS II:

The National Skills Development Strategy contributes to sustainable development of skills growth, development and equity of skills development institutions by aligning their work and resources to the skills needs for effective delivery and implementation.

NSDS II aims to enhance and encourage people development through skills at three levels: i.e. national, sector and at organisational.

The NSDS and the Public and Private Sectors

NSDS II applies equally to, and impacts on, both the private and public sectors, but serves slightly different purposes in each sector.

In the private sector, the strategy has a macro aim of supporting growth, enhancing global competitiveness and spurring employment equity. At enterprise level, it is all about people, productivity and profit: People, in that it supports personal development and career opportunities; productivity, in that people development is linked to enterprise strategy and builds a smarter human resource base; and profit, in that increased productivity leads to growth.

In the public sector, South Africa has adopted a human resource strategy that seeks to maximise people development, management and empowerment through quality skills development to accelerate transformation and service delivery that will benefit the people of South Africa.

Government’s determination to deploy a developmental state in support of national growth and quality of life and its medium-term programme of action both critically depend on the quality of service and thus of people in the public service. All Government departments, public entities and parastatals are accountable for their own implementation of the skills component of the programme of action.

Legal Mandate for the Private Sector

Private sector employers (with some limited exceptions) are required in terms of section 3 of the Skills Development Levies Act to pay a levy of one per cent (1%) of remuneration to their relevant Seta. On approval of the ATR and WSP, the Seta is obliged to reimburse the organisation 50% of their levy contribution.

The Skills Development Act of 1998 (section 10) introduced the Workplace Skills Plans (WSP) as an important instrument in South Africa's skills development strategy. The purpose of the WSP is to describe employers' plans for the training and development of employees in the forthcoming year, based on the analysis of business requirements and the skills needs of current staff. It describes the skills priorities, the education and training programmes that are required to meet and deliver those priorities, as well as the staff who will be targeted for training, indicating the race, gender and disability status of these beneficiaries.

The purpose of the Annual Training Report (ATR) is to report on the delivery of the planned training at the end of the WSP implementation period.
The requirements for the submission of ATRs and WSPs by private sector employers are described in the Sector Education and Training Authorities (Setas) Grant Regulations regarding monies received by a Seta and related matters (Notice No. R. 713, dated 18 July 2005), and in Success Indicator 2.1 of the NSDS (2005-2010). In the case of private sector employers, the submission of the ATR and WSP to the Seta is central to the process of Seta payments of mandatory grants.

NSDS II encourages a close link between the WSP and ATR: “From 2006 the WSP will be judged by an additional criterion, i.e. a report on the performance against the previous year’s WSP (NSDS II Lever 2.1 under Success Indicator 2.1).”

Extract from the Funding Regulations published in the Government Gazette, dated 18 July 2005

Allocation of mandatory grants by Seta

(1) Subject to regulation 10, a Seta must allocate a mandatory grant to;

(a) an employer employing 50 or more employees that has submitted an application for a Workplace Skills Planning or Training Report grant in accordance with sub regulation (2) and in the form prescribed in Annexure “2” to these Regulations [since amended by Amendments to Sector Education and Training Authorities (Setas) Grant Regulations Regarding Monies Received by a Seta and Related Matters, November 2006, Annexure 3]; or

(b) an employer employing less than 50 employees that has submitted an application for a grant in accordance with sub regulation (2) on a simplified form provided by the Seta.

(2) An application for a mandatory grant in terms of sub regulation (1) must be submitted by;

(a) 30 September 2005 for the 2005/2006 financial year or in respect of unclaimed mandatory grants in respect of previous financial years;

(b) 30 June for all subsequent financial years;

(c) within 6 months of registration in the case of an employer who has registered for the first time in terms of section 5(1) of the Skills Development Levies Act.

(3) The mandatory grant to be paid by the Seta;

(a) must be equivalent to 50 % of the total levies paid by the employer in terms of section 3(1), read with section 6 of the Skills Development Levies Act, during each financial year; and

(b) must be paid to the employer at least quarterly.

(4) If the employer does not claim a mandatory grant within the time periods specified in sub regulation (2);

(a) the Seta must transfer the employer's unclaimed mandatory grant funds to the discretionary grant fund.

Regulation 10 states the following:

Grant recovery by employers;

(1) an employer seeking recovery of a grant against the levy payment must meet the eligibility criteria for grant recovery as prescribed in sub regulation (2).

(2) A Seta may not pay any grant to an employer who is liable to pay the skills development levy in terms of section 3(1) of the Skills Development Levies Act unless the employer

(a) has registered with the Commissioner in terms of section 5 of the Skills Development Levies Act;

(b) has paid the levies directly to the Commissioner in the manner and within the period determined in section 6 of the Skills Development Levies Act;

(c) is up to date with the levy payments to the Commissioner at the time of approval and in respect of the period for which an application is made;

(d) has submitted a Workplace Skills Plan within the timeframes prescribed in regulation 6(2) of these regulations; and
(e) with effect from 2006 / 2007 financial year and in subsequent financial years, has submitted a Training Report of performance in respect of the implementation of the previous financial year's Workplace Skills Plan.

(3) Employers who fail to meet the prescribed criteria will forfeit the grant referred to in regulation 6 of these regulations.”

A Seta board or council may grant an extension up to a maximum period of one month from date contemplated for late submission of an application for a mandatory grant subject to a written request by an employer.

**The Levy-Grant System**

The Skills Development Levies Act (SDLA) of 1999 requires that employers pay a Skills Development Levy (SDL) amounting to 1% of payroll. The levies are collected by SARS, transferred to DHET, and then disbursed to the relevant Seta as indicated on the remittance form by the levy paying member, minus 20% of the levy, which is retained by the National Skills fund for funding national skills priorities.

The Setas retain a maximum of 10% of the funds remitted for administration purposes and 70% of the levy is then available for grant refunds (40%) and project interventions (20%), e.g. training of SMEs, training of unemployed workers and increasing supply of skills to the sector.
Appendix 2: Example of SDF/ISDF Letter of Appointment

Organisation Logo and letterhead details

dd mmm 20yy

Your physical address, if not above
The MICTS
SSP Division
Gallagher House, West Wing, Level 3
Gallagher Estate
19 Richards Drive
Midrand
Attention: Millicent Netshituni or Sharnel Santhilal

Dear Millicent/Sharnel,

Letter of SDF/ISDF APPOINTMENT

This serves to confirm that we have appointed Jon Doe as the Skills Development Facilitator for our organisation, Xyz (Pty) Ltd, with effective immediately.

Our organisation levy number is L999999999.

His details are as follows:
Name:
ID no:
Office no:
Cell no:
Email address:

Yours Faithfully

Jane Doe
HR Executive Manager
Appendix 3: Description of the OFO and Scarce and Critical Skills

Scarce and Critical Skills

Definition of Scarce and Critical Skills

The following definitions of Scarce and Critical Skills apply:

**SCARCE SKILLS** refer to those **occupations** in which there are a scarcity of qualified and experienced people, currently or anticipated in the future, either (a) because such skilled people are not available or (b) they are available but do not meet employment criteria. This scarcity can arise from one or a combination of the following, grouped as relative or absolute:

- **Absolute scarcity**: suitably skilled people are not available, for example:
  - A **new or emerging occupation**, i.e. there are few, if any, people in the country with the requisite skills (qualification and experience) and education and training providers have yet to develop learning programmes to meet the skills requirements.
  - Firms, sectors and even the country are unable to implement planned growth strategies and experiencing productivity, service delivery and quality problems directly attributable to a lack of skilled people.
  - **Replacement demand** would reflect an absolute scarcity where there are no people enrolled or engaged in the process of acquiring the skills that need to be replaced.

- **Relative scarcity**: suitably skilled people available but do not meet other employment criteria, for example:
  1. **Geographical location**, i.e. people unwilling to work outside of urban areas.
  2. **Equity considerations**, i.e. there are few if any candidates with the requisite skills (qualifications and experience) from specific groups available to meet the skills requirements of firms and enterprises.
  3. **Replacement demand** would reflect a relative scarcity if there are people in education and training (formal and work-place) who are in the process of acquiring the necessary skills (qualification and experience) but where the lead time will mean that they are not available in the short term to meet replacement demand.

**CRITICAL SKILLS**, on the other hand, refer to specific key or generic and “top up” skills within an **occupation**. In the South African context there are two groups of critical skills:

- **a)** Key or generic skills, including (in SAQA-NQF terminology) critical cross-field outcomes. These would include cognitive skills (problem solving, learning to learn), language and literacy skills, mathematical skills, ICT skills and working in teams.
- **b)** Particular occupationally specific “top-up” skills required for performance within that occupation to fill a “skills gap” that might have arisen as a result of changing technology or new forms of work organisation.

Both scarce and critical skills must be identified at the occupational level, with scarce skills being considered against the **occupation itself** and critical skills being reflected as specific skills within the **occupation**.

Identifying Scarce Skills against Current Occupations

Scarce and critical skill shortages are identified by gathering and analysing information in respect of:

1. **Hard-to-fill vacancies or long-term vacancies**: The South African average across occupations is around 56 days from advertisement to appointment. This is in sharp contrast to the USA norm, which is around 30 days, differences in labour legislation and practices notwithstanding. The proposal is that enterprises should report possible scarcity when they have been unable to fill a position and that position has been advertised as vacant for more than 3 months / 60 working days and where the reasons for not being able to fill the position reflect or are related to one of the following:
a. No appropriately qualified people available, e.g. new occupation, new qualification required.

b. No appropriately experienced people available, e.g. qualification available but experience and application in the work place is a key employer requirement.

c. No appropriately qualified and/or experienced people available from target groups e.g. women mining engineers.

2. **Sourcing skills from outside of the country:** Where there is hard or anecdotal evidence that key employers in the sector are recruiting skilled workers outside of the country to fill specific occupations.

3. **Higher wages:** Where there is hard or anecdotal evidence that the lack of skilled people has resulted in skilled workers demanding higher wages or employers paying a premium for skill.

4. **Lower productivity levels**: Where enterprises or sub-sectors are reporting that scarce or critical skills shortages are being reflected in lower quality, productivity or service delivery measures. For example, there is greater wastage, more machine down time, more mistakes, greater need for supervision, more work having to be done over to correct mistakes.

5. **Lower productivity growth:** Where within enterprises, sub-sectors, sectors and even nationally there is less expenditure on innovation, R&D, less product or service value added.
Appendix 4: MICT/SSP Process for Inter-Seta Transfers
Appendix 5: Participation Confirmation Letter Procedure

Request from Client for Participation Confirmation Letter (Advisor)

Start

Telephonic request?

No

Yes

Request email or fax request

Email/Fax request

Receive email or fax request for letter

Verified SISA allocation

Does the company belong to SISA?

No

Refer client to relevant SISA

Yes

OGS

Verify Participation status

This company submitted their latest ATR/WSP?

Yes

Letter of Participation

Generate letter; SM to sign

Email Letter of Participation to client, or client collects

Letter of Participation

Scanned Letter of Participation

Email with scanned Letter of Participation

Letter of Contribution

Scanned Letter of Contribution

Email with scanned Letter of Contribution

Letter of Rejection

Scanned Rejection Letter

Email with scanned Rejection Letter

End

Store all above completed documentation as per SSP filing procedure

All completed documentation stored

Legend

MASTER from server

Document to be stored

DoL – Dept of Labour

OGS – On-Line Grant System

SM – Senior Manager
Appendix 6: Seta Registration of a New Company

Seta Registration of New Company (Advisor)

Start

Email/Fax request

Receive email, fax or telephonic request

Mention that Seta is SETA 12 and refer client to SARS

Await list of New Companies from Deloitte

Is the client registered?

No

Yes

Inform client via email of registration and to submit ATRWISP on the OGS within 6 months

Store all above completed documentation as per SSP Filing procedure

All completed documentation stored

End

Legend

MASTER from server

Document to be stored

DoL – Dept of Labour

OGS – On-Line Grant System

SM – Senior Manager

Received request/ log call

Seta Registration Confirmation Letter

Scanned Seta Registration Confirmation Letter

Email

SSP Filing Procedure

Isset Registration Confirmation Letter
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