Reference Manual for Skills Development Facilitators

2018

Our Vision:
To be recognised as the leader in the development of a highly skilled knowledge-based information society.

Our Mission:
The MICT SETA generates, facilitates and accelerates the processes of quality skills development at all levels in the MICT sector.
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Introduction and Background Information

References to Skills Development Facilitators (SDFs) and Independent Skills Development Facilitators (ISDFs)

- SDFs are employees of organisations, their responsibility is to collect and submit to SETAs data relating to past and planned training in the organisation.
- ISDFs perform the same roles as SDFs, but are sub-contracted by the organisation to perform this function.

For the purposes of this document, unless otherwise stated, all references to SDFs must be interpreted as including ISDFs.

Purpose of the SDF Reference Manual

As published on the 3rd December 2012 in Government Gazette Notice No 35940, there are two types of grants that the MICT SETA can/may provide to the MICT SETA employers/stakeholders, namely:

- **Mandatory Grants**: This grant is paid to the MICT SETA employers on the basis of the submission and approval of the Annual Training Reports (ATRs), Workplace Skills Plans (WSPs) (including PIVOTAL Training Plans (PTPs and PIVOTAL Training Reports (PTRs) where applicable).
- **Discretionary Grants**: This is funding awarded to the MICT SETA employers who are providing training that addresses respective workplaces' scarce and critical skills needs and assists in the achievement of the MICT SETA commitments to the Department of Higher Education and Training (DHET).

This Reference Manual primarily addresses the requirements for Mandatory Grants and summarises the processes around Discretionary Grants. The purpose of this SDF Reference Manual is to inform the SDFs and employers of:

- The legislative requirements
- The Mandatory Grants Payment Processes
- The MICT SETA Online Grant System
- The Discretionary Grants Processes

Various sources have been used to compile this Reference Manual. This Manual is intended to be a comprehensive reference document that will assist SDFs with all aspects of the Mandatory and Discretionary Grants Payment Processes, and is intended to alleviate queries from SDFs.

Layout of the Reference Manual

This Manual is segmented as follows:

Chapter 1: Provides an introduction, important references and a list of the acronyms used.
Chapter 2: Provides all the information needed by organisations and SDFs prior to accessing the MICT SETA Online Grant System where the ATR/WSP (including PTPs/PTRs where applicable) data is captured and submitted. The chapter also presents information on the support services provided by MICT SETA SSP staff.

Chapter 3: Outlines the process of registering on the Online Grant System, capturing and submitting the ATR and WSP (including PTP/PTR where applicable) data, and presents the Online Grant System Utilities that are available to the SDF.

Chapter 4: Provides the contact details of the MICT SETA SSP staff members who can assist organisations and SDFs.

Appendix 1: Provides a template of a typical Letter of Appointment to be used when an SDF has to register on the Online Grant System.

Important References

The following documents are also available on the MICT SETA website, www.mict.org.za

- Skills Development Act (No. 97 of 1998) as amended
- Skills Development Levies Act (No. 9 of 1999) (SDLA)
- Regulations published in the Government Gazette, No. 27801, 18 July 2005
- Regulations published in the Government Gazette, No 35940, 3 December 2012
- MICT SETA Criteria and Guidelines for PIVOTAL Grants.

Acronyms and Definitions

The following acronyms are used within this Reference Manual:

<table>
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<th>Abbreviation</th>
<th>Description</th>
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<tr>
<td>AET</td>
<td>Adult Education and Training (replaced the old ABET)</td>
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<tr>
<td>ATR</td>
<td>Annual Training Report; reflects the actual training 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>B-BBEE</td>
<td>Broad-Based Black Economic Empowerment.</td>
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<tr>
<td>BEE</td>
<td>Black Economic Empowerment</td>
</tr>
<tr>
<td>Disability</td>
<td>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>Department of Higher Education and Training.</td>
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<td>ICT</td>
<td>Information and Communications Technology.</td>
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<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 organisation.</td>
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<tr>
<td>IT</td>
<td>Information Technology.</td>
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<td>L Number</td>
<td>Levy Number, same as SDL Number, unique identifier for each company, found on EMP 201 and EMP 103 forms in the organisation’s Finance Department.</td>
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<tr>
<td>Abbreviation</td>
<td>Description</td>
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<td>MICT SETA</td>
<td>Media, Information and Communication Technologies Sector Education and Training Authority.</td>
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<td>NQF</td>
<td>National Qualifications Framework.</td>
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<td>NSDS</td>
<td>National Skills Development Strategy.</td>
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<td>NSF</td>
<td>National Skills Fund.</td>
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<td>OFO</td>
<td>Organising Framework of Occupations.</td>
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<td>OGS</td>
<td>Online Grant System.</td>
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<td>PIVOTAL</td>
<td>Professional, vocational, technical and academic learning programmes; result in qualifications or part qualifications registered on the National Qualifications Framework.</td>
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<td>PTP</td>
<td>Pivotal Training Plan.</td>
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<tr>
<td>PTR</td>
<td>Pivotal Training Report.</td>
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<td>SARS</td>
<td>South African Revenue Services.</td>
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<td>SAQA</td>
<td>South African Qualifications Authority.</td>
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<td>SDA</td>
<td>Skills Development Act (No. 97 of 1998) as amended.</td>
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<td>SDF</td>
<td>Skills Development Facilitator; someone appointed within the organisation to assume responsibility of 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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<td>SDL Number</td>
<td>Skills Development Levy Number; unique identifier for each company, found on EMP 201 and EMP 103 forms in the organisation’s Finance Department.</td>
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<td>SDLA</td>
<td>Skills Development Levies Act (No. 9 of 1999).</td>
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<td>SETA</td>
<td>Sector Education Training Authority.</td>
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<td>SIC</td>
<td>Standard Industrial Classification.</td>
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<td>SME</td>
<td>Small and Micro Enterprise. Organisations having 49 and less employees.</td>
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<td>SSP</td>
<td>Sector Skills Plan; a document outlining the sector’s scarce and critical skills needs.</td>
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<td>DTI</td>
<td>Department of Trade and Industry.</td>
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<td>TLS</td>
<td>Training Layoff Scheme.</td>
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<td>WSP</td>
<td>Workplace Skills Plan; a training plan (forward looking) covering the period 1st April of the current year to 31st March of the next year.</td>
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Process Information

Confidentiality

NB: All data collected by the MICT SETA through this process is treated with confidentiality. Data received is aggregated for the purposes of research and planning.

Legislative Considerations

Organisations are allocated to SETAs based on the Standard Industrial Classification (SIC) code. This code is usually decided upon by the owners of an organisation at the time of registering the organisation with the Companies and Intellectual Property Commission (CIPC), previously known as the Companies and Intellectual Property Registration Office (CIPRO). The SIC code can be found on the organisation registration documents, as well as in the Online Grant System. For a full list of the gazetted SIC codes allocated to each SETA, please visit the following link:


Each month, organisations with a total annual payroll of R500,000.00 and more contribute 1% of the payroll in the form of a Skills Development Levy (SDL) to the South African Revenue Services (SARS) in accordance with legislation. This contribution is reflected on the organisation’s monthly EMP 201 form, which also reflects PAYE and UIF paid, the EMP 201 form can be accessed from the Finance Department.

In order to receive its Mandatory Grant, as well as to access Discretionary Grants, organisations that contribute the skills development levies are required to submit an
Annual Training Report (ATR), Workplace Skills Plan (WSP) and/or the PIVOTAL Training Plan (PTP) and the PIVOTAL Training Report (PTR) to the MICT SETA. The ATR and/or the PTR provide data relating to the training that was implemented during the previous year while the WSP and/or the PTP provide data relating to the training that is intended to be implemented during the forthcoming year.

Upon submission of the ATR/PTR and WSP/PTP, and provided that they are approved by the MICT SETA, the organisation will receive its Mandatory Grants from the MICT SETA on a quarterly basis.

Government Gazette No 35940, 3rd December 2012, asserts that:

- Employers are entitled to a Mandatory Grants amounting to 20% of their Skills Development Levy contributions.
- Discretionary Grants will amount to 49.5% of the SDL, of which at least 80% must be allocated to PIVOTAL programmes that address scarce and critical skills.
- The ATR/PTR and WSP/PTP must be submitted by 30 April each year.
- An employer who has a recognition agreement with a trade union/s must provide evidence that the ATR/PTR and WSP/PTP have been subject to consultation with the recognised trade union/s and the ATR/PTR and WSP/PTP must be signed off by the labour representative appointed by the recognised trade union.

Skills Development Levy Model

The full gazette can be downloaded from the MICT SETA website at the following link:
As stated in this Government Gazette, ‘PIVOTAL’ is an acronym which means professional, vocational, technical and academic learning programmes that result in qualifications or part qualifications registered on the National Qualifications Framework. The National Skills Development Strategy (NSDS) III provides more insight into what PIVOTAL programmes are (page 6):

“These are programmes which provide a full-occupationally-directed qualification. Such courses will normally begin in a college or university and would include supervised practical learning in a workplace as part of their requirement. The courses – especially for workers – could in some cases start in the workplace and then move to a college or university. The courses would culminate in an occupational qualification. PIVOTAL courses will normally be offered by arrangement between a SETA, an education institution, an employer and a learner.” Further insight is gained on page 13 of Government Gazette No 35940, 3rd December 2012, in the section entitled “PIVOTAL Grant”. According to NSDS III, many of the professional areas of study combine coursework at universities, universities of technology and FET institutions with structured learning at the workplace. This is achieved by means of professional placements, work-integrated learning, apprenticeships, learnerships, skills programmes, and work experience placements. The MICT SETA will fund these programmes through the PIVOTAL Grant. PIVOTAL learning programmes can be accessed by both employed and unemployed people.

In summary, if the ATR/PTR and WSP/PTP are approved, the organisation will receive 20% of their 1% levy contribution back as a Mandatory Grant, and can apply for a PIVOTAL Grant to implement PIVOTAL learning programmes. Because not all organisations submit their ATR/PTR and WSP/PTP, unpaid Mandatory Grants are moved to Discretionary Grants, and because not all organisations apply for Discretionary Grants, organisations that do participate in this process can actually apply for and receive more than what their total levy contribution was.

Training Committee

Introduction

An employer with 50 or more employees has to establish a Training Committee and ensure its active participation with regards to skills development matters within an organisation. As stated above, in the case of an employer who has a recognition agreement with a trade union/s, evidence must be provided that the ATR/PTR and WSP/PTP have been subjected to consultation with the recognised trade union/s and the ATR/PTR and WSP/PTP must be signed off by the labour representative appointed by the recognised trade union.

Composition of the Training Committee

The Training Committee must comprise three constituent parties: the employer representative, the employee representative and union representative (where applicable). The SDF remains a critical member of the Training Committee at all times. The number of employees and employer representatives must be equal. No employee representative shall be a manager. At least one employee representative must represent each of the Major OFO categories below, unless if there are no employees in some of the categories.
Managers
Professionals
Technicians and Associate Professionals
Clerical Support Workers
Service and Sales Workers
Skilled Agricultural, Forestry, Fishery, Craft and Related Trades Workers
Plant and Machine Operators and Assemblers
Elementary Occupations

The employee representative must be an employee of the organisation who is nominated by fellow employees, and must not be in a management position. The employee representatives must discuss the training and development needs with their fellow employees and present them to the Training Committee for discussion and/or implementation. The SDF can neither be the employee nor the employer representative.

Responsibilities of the Training Committee

Using The South African Labour Market Guide\(^1\) as a guide, the MICT SETA adopted the following as the responsibilities of the Training Committee. It should be noted that it is at the discretion of the Training Committee to place some of these responsibilities partially or wholly on the SDF. The Training Committee must:

- Ensure that the organisation has a Training Policy and that it is in line with the regulations as laid down by the Skills Development Act
- Ensure that the development and implementation of the WSP/PTP is aligned to the strategic Mission and Vision of the organisation
- Keep the envisaged training and development of employees in the organisation abreast with the long-term transformation objectives of the organisation
- Ensure that the WSP/PTP is aligned to the Employment Equity Plan and Business Plan of the organisation
- Take cognisance of B-BBEE requirements
- Establish training priorities for the organisation based on its short and long term needs
- Align training to the MICT Sector Skills Plan, learnerships, career pathways, accredited national qualifications, etc.
- Communicate the completed WSP/PTP to other employees in the organisation
- Monitor the implementation of the Workplace Skills Plan.
- Annually develop the WSP/PTP
- Ensure fair and equitable development of employees in the organisation
- Acquire requisite resources to evaluate training development within the organisation.
- Identify the skills development needs within the organisation and continually evaluate the implementation
- Develop and implement external and internal skills development strategies
- Monitor the progress of the skills development within the organisation.
- Monitor the implementation of the WSP/PTP
- Develop and implement correctional actions where required

\(^1\) Ibid.
– Ensure that the skills needs of the organisation are identified
– Ensure that all staff has been classified according to the OFO codes
– If required, ensure that that there is a skills performance system in the organisation
– If and where required, ensure that there is an individual development pathway for all employees, as well as the skills requirement and learning pathway
– Where applicable, ensure that a portfolio of evidence has been developed for all employees that receive training in the organisation
– Ensure that Mandatory Grants are spent on skills development.

The Role and Responsibilities of the SDF

The SDF is someone appointed by the organisation to assume responsibility for gathering and submitting the ATR/PTR and WSP/PTP data to a SETA, prior to midnight 30th April each year as per legislation.

Only one SDF is allowed per organisation. If more than one SDF is required in an organisation, the organisation must decide who the main SDF is and that person will take responsibility of capturing data on the SETA’s Online Grants System.

Some of the following responsibilities of the SDF have been borrowed from The South African Labour Market Guide. While this guide presents a large number of responsibilities, the MICT SETA has adopted the following as the responsibilities of the SDF:

– Chair the Training Committee
– Be a non-voting member of the Training Committee
– Be a training committed leader and lead the process of organisational skills development and employee development
– Ensure that there is equal employer – employee representation on the Training Committee and at Training Committee meetings
– Ensure that at least four (quarterly) Training Committee meetings are held each year
– Facilitate the development of employees in the organisation
– Advise the organisation on the implementation of the WSP/PTP
– Ensure adherence to quality assurance requirements of the relevant SETA by the organisation
– Serve as liaison and contact person between the organisation and the SETA
– Complete the ATR/PTR and WSP/PTP accurately and submit it to the SETA before the deadline
– Ensure that the non- ATR/PTR and WSP/PTP data (organisation contact details, SDF details, etc.) on the Online Grant System is kept up to date at all times.
– Monitor the Grants and Levies form in the MICT SETA Online Grant System every month to ensure that the organisation’s levies are being shown in the system, and that the MICT SETA is paying the organisation its Mandatory Grant every quarter.

The MICT SETA does not provide a sponsored external (Independent) SDF for an organisation that does not have a “qualified” SDF. The organisation should

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appoint the ISDF as outlined below. The MICT SETA does not sponsor SDF training.

**Use of an ISDF**

If the organisation prefers to use the services of an ISDF instead of having its own internal SDF, a downloadable list of MICT SETA approved ISDFs will be found on the MICT SETA website at the following link:


**Submission Criteria for Mandatory Grant Payments**

Mandatory Grant payment process does not involve claiming expenses for training from a SETA. Employers who meet the set criteria will qualify for the SETA Mandatory Grant payments. The MICT SETA may not pay a Mandatory Grant to an employer who is liable to pay the skills development levy in terms of Section 3(1) of the Skills Development Act, unless the levy paying employer:

- Has registered with the Commissioner [of SARS] in terms of section 3(1) of the Skills Development Levies Act (SDLA);
- Has paid the levies directly to the Commissioner in the manner and within the time period determined in section 6 of the Skills Development Levies Act;
- Is up to date with levy payments to the Commissioner at the time of approval and in respect of the period for which an application is made;
- Has submitted the ATR/PTR and WSP/PTP as contemplated in section 4(1) that contributes to the relevant SETA SSP within the timeframes prescribed in section 4(2) and 4(3) of the Skills Development Levies Act (SDLA).
- Has received the approval for the submitted ATR/WSP.

**Other important submission considerations:**

- In the case of an employer who has a recognition agreement with a trade union/s, there must be evidence provided that the recognised trade union has actively participated in the development of the ATR/PTR and WSP/PTP and must be signed off by the labour representative appointed by the recognised trade union. In a case where there is no recognised trade union, the employee representative assumes this role.

- Where a newly registered organisation with SARS joins the MICT SETA, this organisation has six months, from date of registration with SARS, to submit its WSP/PTP to the MICT SETA in accordance with the MICT SETA Criteria

- For the 2018/19 WSP/PTP and ATR/PTR submissions, Version 2015 of the OFO codes will be used. It is highly recommended that SDFs ensure that the occupations of all existing employees are coded as soon as possible. In instances where employers are not able to find the most appropriate OFO codes, they are advised to use the OFO codes similar and/or closest to the occupations the organisation seeks to address.

- The ATR/PTR and WSP/PTP data must be submitted onto the Online Grant System before midnight 30 April 2018.
- No hard-copy submissions shall be accepted.
- **There will be no extensions provided for late submissions.**
− The only exception to this is where the ATR/PTR and WSP/PTP are submitted by a newly registered organisation, in which case the submission must be concluded within 6 months of organisation registration as indicated on the CIPC Organisation Registration Form, and only the WSP is submitted in the first year.
− The WSP must contain training interventions to (at least) the value of the Mandatory Grants paid.
− If the organisation is new to the MICT SETA or has changed the banking details, the original banking details must be submitted to the MICT SETA before 4pm on Friday, 28th April 2018. The provision of banking details can be one of the following:

  . **An original cancelled cheque.** (Not a copy). This is a cheque torn out of the organisation’s chequebook, two diagonal lines are drawn across the cheque and “Cancelled” is written between the two lines. Note that the organisation name on this cheque must be the same as the organisation name shown in the Organisation Details form. If the organisation’s registration number appears on the cheque, this number must also be the same as the number shown in the Online Grant System. Note that the MICT SETA cannot change the data presented under the Department of Higher Education and Training Data column.

  . **An original letter from the bank or a copy thereof that has been certified by a Commissioner of Oaths.** This letter must be on the letterhead of the bank, must be stamped by the bank, and must reflect the organisation’s name and registration number. Once again, the organisation name on this letter must be the same as the organisation name shown in the Organisation Details form, and the organisation’s registration number must also be the same as the number shown in the Online Grant System. Note that the MICT SETA cannot change the data presented under the Department of Higher Education and Training Data column.

If the name/registration number of the organisation on the original cancelled cheque or original bank letter is not the same as the organisation name shown in the Online Grant System, the Change of Name certificate (or certificates) which relates the organisation name shown in the Online Grant System to the organisation name on the cheque or bank letter must be provided. The L Number must be clearly stated on the documentation as well as the contact details of organisation’s representative. The documentation must be sent by registered mail, courier or hand deliver for the attention of:

**Mr. Sphesihle Hlongwane**
Block 2, Level 3 West
Gallagher Estate,
19 Richards Drive,
Midrand

− If the name of the organisation is not the same as the name of the organisation shown in the Online Grant System, the Change of Name certificate (or certificates) which relates the name of the organisation shown in the Online Grant System to the name of the organisation on the cheque or bank letter must also be uploaded into the Upload Documents” section of the Online Grant System.
The fully completed and signed Authorisation Form (available from the link http://www.mict.org.za/inner.aspx?section=3&page=122) must be uploaded on the SETA’s Online Grant System before the 30th April 2018. In particular:

- The name of the organisation on the Authorisation Form must match the name of the organisation shown in the Online Grant System. If the name of the organisation has changed and the organisation wishes to place the new name on the Authorisation Form, the Change of Name certificate (or certificates) which relates the name of the organisation shown in the Online Grant to the new name of the organisation must be uploaded with the Authorisation Form into the ATR/PTR and WSP/PTP Forms. Note that the MICT SETA cannot change the data presented under the Department of Higher Education and Training Data column.

- The L Number of the organisation on the Authorisation Form must be the same as the one the Online Grant System.

- The “Organisation Contacts”, that is, the Name, ID Number and Position of the Authorised Signatory must be the details of management authorised to sign on behalf of the organisation. The SDF cannot be the Authorised Signatory.

- For organisations with 50 or more employees, the Name, ID Number and Position of the Employee Representative must be the details of one of the Training Committee members captured under the “Training Committee” form in the Online Grant System. This is not a requirement for organisations with 49 or less employees. In the instance where there is Union representation, the Union Representative shall be the Employee Representative signatory. Where there is more than one Union within the organisation, this form must be modified to accommodate all Union members as signatories. Should this modification extend to more than one page, all signatories shall initial all pages.

- The Name and ID Number of the SDF must be reflected under the “SDF” form in the Online Grant System.

- All parties shall sign their full signature and date the Authorisation Form.

Failure to comply with these criteria will result in the non-approval of the organisation’s submission and the organisation losing its Mandatory Grants.

NB: All documentation must be filed safely for Monitoring and Evaluation purposes by the SETA.

**WSP/ATR/PTP/PTR Approval**

SDFs will be informed by a system generated e-mail of their ATR/PTR and WSP/PTP submission approval. The SDF can also check the status on the Online Grant System. Approval implies that the MICT SETA is satisfied with the documents submitted, and will Mandatory Grants back to the organisation on a quarterly basis. The MICT SETA will also consider funding the organisation through Discretionary Grants.
Use of the Mandatory Grant

MICT SETA employers are expected to use Mandatory Grants for skills development purposes as per legislation.

Suggested ATR/WSP Submission Project Plan

Many SDFs leave the data capturing to the last minute. Inevitably, each year, about two-thirds of all submissions happen in the last week of the submission deadline. This is difficult for the SSP staff members who are trying so hard to assist SDFs who require support. Furthermore, there are many SDFs using the system towards the submission deadline, and this causes the system to slow down.

SDFs must ensure that things are not left until is too late, SDFs are encouraged to submit their ATR/PTR and WSP/PTP at least by mid-April.

The Organising Framework for Occupations (OFO)

Overview of the Structure of the OFO codes

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 level, used in the context of competency. The four skill levels adopted by the MICT SETA are Learner/Trainee, Junior/Novice, Intermediate and Senior/Expert.

**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 Band</td>
<td>Professional Qualifications</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td>Honours degrees</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>National first degrees</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Higher diplomas</td>
</tr>
<tr>
<td></td>
<td></td>
<td>National diplomas</td>
</tr>
<tr>
<td></td>
<td></td>
<td>National certificates</td>
</tr>
</tbody>
</table>

Further Education and Training Certificate (FETC)

<table>
<thead>
<tr>
<th>Level</th>
<th>Band</th>
<th>Qualification Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Further Education and Training Band</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>
</tbody>
</table>

General Education and Training Certificate (GETC)

<table>
<thead>
<tr>
<th>Level</th>
<th>Band</th>
<th>Qualification Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>General Education and Training Band</td>
<td>Grade 9</td>
</tr>
<tr>
<td></td>
<td></td>
<td>AET Level 4</td>
</tr>
</tbody>
</table>

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

**Classification of Personnel into OFO Occupations**

In 2017/18, we are using OFO Version 2015 for the ATR/PTR and WSP/PTP.

The starting point is to first classify all personnel into the various OFO occupations. There are two approaches that can be used. **Organizations’ job titles should not be used when determining respective occupations.** OFO classifications are available in the form of an excel file available under the link: [http://www.mict.org.za/inner.aspx?section=3&page=122](http://www.mict.org.za/inner.aspx?section=3&page=122).

As an example where job titles can be misleading, when looking at a Chartered Accountant, an Accountant, an Assistant Accountant and an Accountant Assistant, the first three would be classified under Accountant, but an Accountant Assistant is actually a clerk.

Another example relates to Managers. The question to ask is “How much management does this person actually do”. We think this question probably applies more to BBBEE than to the ATR/WSP, because when the BBBEE inputs and the WSP/ATR inputs from employers are compared, large discrepancies are being found.

Where a person has a wide range of tasks, making it difficult to allocate an OFO code, the SDF needs to decide which the more dominant/important role is, and allocate an OFO accordingly.

Regarding learners or trainees, an OFO code must be allocated because these people must be viewed as studying towards an occupation.

Where a person is promoted or changes occupation (particularly when classifying learners), it is important to review and change the OFO classification.

The two approaches that can be used are:

- Using a top-down approach to find the relevant OFO occupation. Starting at OFO Level 1, decide which category the person is positioned in, and then work down through the structure.
- Using the Excel OFO file on your dashboard to find the relevant OFO occupation. When using this 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, search on “procure” and also search for “buyer”.

If you cannot find an appropriate OFO code for a person in your organisation, please email the job description, with an indication of who the person reports to and who reports to this person, to the appropriate MICT SETA staff member.

**Description of the OFO and 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* (positions in the organisation) 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:

- **Geographical location**, i.e. people unwilling to work outside of urban areas.

- **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.

- **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 skills within an occupation. In the South African context there are two groups of critical skills:

- 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.
Particular occupationally specific 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:

- **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. Organisations must 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 or 60 working days and where the reasons for not being able to fill the position reflect or are related to one of the following:
  
  - No appropriately qualified people available, e.g. new occupation, new qualification required.
  - No appropriately experienced people available, e.g. qualification available but experience and application in the work place is a key employer requirement.
  - No appropriately qualified and/or experienced people available from target groups e.g. women mining engineers.

- **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.

- **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.

- **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 machines down time, more mistakes, greater need for supervision, more work having to be done over to correct mistakes.

- **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.

The MICT SETA CV Database

With regards to organisation requiring skilled people, the MICT SETA has a database of unemployed persons. Constituent employers are encouraged use this database for recruitment purposes.
Types of Training Interventions

There is often confusion over the definition of the different types of learning programmes that the SETA has traditionally been involved with. The following definitions are provided.

Definition of a Learnership

A Learnership is an occupationally directed learning programme comprising both structured practical workplace (on-the-job) experience (70% of the content) and structured theoretical learning (30% of the content) conducted against registered Unit Standards at an accredited Training Institution. A Learnership results in a qualification, its duration is approximately twelve months.

Definition of an Internship

An Internship is a programme designed to give tertiary graduates and University of Technology learners an opportunity to extend/obtain their academic qualifications with structured workplace exposure and specialised training. Participants are placed on a full-time basis, generally for a period of six to twelve months, in stakeholder companies and government organisations, the purpose of which is to provide the learner with workplace experience that builds on the qualification or assists in completing the qualification. Either employed or unemployed persons can get involved in an Internship. The Internship usually involves just the learner, who is a potential employee to a company, and the potential employer. Taking note of the learner’s level of education, capabilities and experience, the employer or training provider defines the workplace programme that must be completed for the learner to obtain the required skills for the work to be performed.

Definition of a Skills Programme

A Skills Programme is a short learning intervention conducted against registered Unit Standards at an accredited Training Institution, and the training programme must include a workplace component. It does not result in a full qualification, but the accumulation of credit-bearing Skills Programmes may lead to or contribute towards a full qualification.

Definition of a Short Course

A Short Course is any learning or development programme that is not credit-bearing towards an NQF registered qualification*. Short Courses are not aligned to unit standards. Likely examples include:

- Courses on soft skills such as performing presentations, conflict management, negotiation, etc.
- Internal training hosted by one of your staff.
- Internal training hosted by an external trainer.
- e-Learning courses.
- Driver’s license.
- Product Specific Training.
- Organisation Specific Training.

Note that evidence must be kept to confirm that this training took place. Evidence would include the agenda for the training, the signed attendance register reflecting start and end times, credits against registered unit standards (in some instances), etc.
Below are the previous frequently asked questions by SDFs:

- **Can the training intervention and associated costs of a sibling of an employee be included?** Yes, but make a note of this in the “Comments” field. The sibling should also be listed as “Unemployed” by the submitting organisation.

- **Can team building 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 learn new skills that would be 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.

- **Can vac students be included?** No.

- **How do we factor online training in?** With regard to the cost of the software and hardware, talk to your finance department to find out how much has been written off in the past year, or will be written off in the next year, and use that as the cost. We suggest that this training belongs in (DTI, BBBEE) Category F (Occupationally-directed instructional programmes), and in terms of the DHET definitions it would be a short course, the description being “Any learning or development programme that may or may not lead to credits towards an NQF registered qualification”, classroom or simulated or classroom and simulated. No workplace component.

The table below provides a detailed definition of the various learning programmes as per the DTI Learning Programme Matrix and the DHET Appropriate Learning Strategies.

**Table 1: Types of Training Interventions**

<table>
<thead>
<tr>
<th>DHET Type of Learning Programme</th>
<th>DTI Type of Learning Programme</th>
<th>Description</th>
<th>Learning Site</th>
<th>Learning Achievement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-Doctoral Research Degree</td>
<td>Ed</td>
<td>10</td>
<td>Classroom based theoretical knowledge provided by an institutional provider, such as universities and colleges, ABET providers</td>
<td>Recognised theoretical knowledge resulting in the achievement of the qualification issued by an accredited or registered formal institution of learning</td>
</tr>
<tr>
<td>Doctorate</td>
<td>Ed</td>
<td>9</td>
<td>Classroom based theoretical instruction alone – formally assessed by the institution</td>
<td>Classroom based</td>
</tr>
<tr>
<td>Masters Degree</td>
<td>Ed</td>
<td>8</td>
<td>Classroom based theoretical knowledge provided by an institutional provider, such as universities and colleges, ABET providers</td>
<td>Classroom based</td>
</tr>
<tr>
<td>Professional Qualification</td>
<td>Ed</td>
<td>7</td>
<td>Classroom based theoretical knowledge provided by an institutional provider, such as universities and colleges, ABET providers</td>
<td>Classroom based</td>
</tr>
<tr>
<td>National First Degree (4 years)</td>
<td>Ed</td>
<td>7</td>
<td>Classroom based theoretical knowledge provided by an institutional provider, such as universities and colleges, ABET providers</td>
<td>Classroom based</td>
</tr>
<tr>
<td>Honours Degree (No Workplace Experience)</td>
<td>Ed</td>
<td>7</td>
<td>Classroom based theoretical knowledge provided by an institutional provider, such as universities and colleges, ABET providers</td>
<td>Classroom based</td>
</tr>
<tr>
<td>National First Degree (3 years)</td>
<td>Ed</td>
<td>6</td>
<td>Classroom based theoretical knowledge provided by an institutional provider, such as universities and colleges, ABET providers</td>
<td>Classroom based</td>
</tr>
<tr>
<td>Higher Diploma (No Workplace Experience)</td>
<td>Ed</td>
<td>6</td>
<td>Classroom based theoretical knowledge provided by an institutional provider, such as universities and colleges, ABET providers</td>
<td>Classroom based</td>
</tr>
<tr>
<td>National Diploma (No Workplace Experience)</td>
<td>Ed</td>
<td>5</td>
<td>Classroom based theoretical knowledge provided by an institutional provider, such as universities and colleges, ABET providers</td>
<td>Classroom based</td>
</tr>
<tr>
<td>DHET Type of Learning Programme</td>
<td>DHET Abbreviation</td>
<td>NQF Level</td>
<td>DTF Type of Learning Programme</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------------</td>
<td>-----------</td>
<td>--------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>National Certificate (No Workplace Experience)</td>
<td>Ed</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABET (No Workplace Experience)</td>
<td>Ed</td>
<td>1-4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Higher Diploma (With Workplace Experience)</td>
<td>TQ, TP</td>
<td>6</td>
<td>B. Institution-based theoretical instruction as well as some practical learning with an employer or in a simulated work environment – formally assessed through the institution</td>
<td>Mixed mode delivery. General theoretical knowledge provided by an institutional provider, such as universities and colleges, schools, ABET providers, and supervised experiential learning with an appropriate employer or simulated work environment</td>
</tr>
<tr>
<td>National Diploma (With Workplace Experience)</td>
<td>TQ, TP</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>National Certificate (With Workplace Experience)</td>
<td>TQ, TP</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internship</td>
<td>I</td>
<td>5+</td>
<td>C. Recognised or registered structured experiential learning in the workplace that is required after the achievement of a qualification – formally assessed by a statutory occupational or professional body</td>
<td>Structured learning in the workplace with mentoring or coaching. A workplace or practical component is required.</td>
</tr>
<tr>
<td>Articles</td>
<td>A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Licensing requirements</td>
<td>L</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learnerships</td>
<td>Ls</td>
<td>1-8</td>
<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. An occupationally directed programme resulting in a registered qualification and that requires an agreement and/or contract</td>
</tr>
<tr>
<td>Apprenticeships (Section 13)</td>
<td>Ap</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Skills Programmes</td>
<td>SP</td>
<td></td>
<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. An occupationally directed programme, which is presented by an accredited provider and when completed will constitute a credit towards an NQF registered qualification. Workplace and some institutional as well as SETA providers.</td>
</tr>
<tr>
<td>Short Courses</td>
<td>SC</td>
<td></td>
<td>F. Occupationally-directed instructional programmes</td>
<td></td>
</tr>
<tr>
<td>Workshop</td>
<td>CPD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seminar</td>
<td>CPD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conference</td>
<td>CPD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work experience for unemployed graduates (in scarce skills)</td>
<td>WE</td>
<td>G. Work-based informal programmes</td>
<td>Informal training. Work experience provided by a workplace for unemployed graduates (in scarce skills)</td>
<td></td>
</tr>
</tbody>
</table>

The MICT SETA SDF Reference Manual 2018
Expenses that may be included in the ATR/ PTR and WSP/PTP

Introduction

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

B-BBEE Considerations

In defining the costs that can be included in the ATR/WSP/PTP, the MICT SETA has decided to adopt the DTI definition of costs associated with Broad-Based Black Economic Empowerment (B-BBEE) measurement of the Skills Development Element. The following is extracted from Gazette No 38765 of 6 May 2015, “B-BBEE Codes of Good Practice”, in particular, “Code Series 300”. Please refer to the full gazette at: https://www.thedti.gov.za/gazzettes/BEE38766.pdf

The skills development scorecard under statement 300:

<table>
<thead>
<tr>
<th>Category</th>
<th>Skills Development Element</th>
<th>Weighting points</th>
<th>Compliance Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1.1</td>
<td>Skills Development Expenditure on any programme specified in the Learning Programme Matrix for black people as a percentage of the Leviable Amount</td>
<td>8</td>
<td>6%</td>
</tr>
<tr>
<td>1.1.1.1</td>
<td>Skills Development Expenditure on Learning Programmes specified in the Learning Programme Matrix for black people as a percentage of Leviable Amount.</td>
<td>4</td>
<td>0.3%</td>
</tr>
<tr>
<td>1.1.1.2</td>
<td>Skills Development Expenditure on Learning Programmes specified in the Learning Programme Matrix for black employees with disabilities as a percentage of Leviable Amount.</td>
<td>4</td>
<td>2.5%</td>
</tr>
<tr>
<td>1.1.2</td>
<td>Learnerships, Apprenticeships, and Internships</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1.2.1</td>
<td>Number of black people participating in Learnerships, Apprenticeships and internships as a percentage of total employees</td>
<td>4</td>
<td>2.5%</td>
</tr>
<tr>
<td>1.1.2.2</td>
<td>Number of black unemployed people participating in training specified in the learning programme matrix as a percentage of number of employees</td>
<td>4</td>
<td>2.5%</td>
</tr>
<tr>
<td>Bonus points:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1.3</td>
<td>Number of black people absorbed by the Measured and Industry Entity at the end of the Learnerships programme</td>
<td>5</td>
<td>100%</td>
</tr>
</tbody>
</table>

Amendments:
- Main target doubled from 3% to 6% of “leviable amount” (annual payroll);
- Now points available for training black unemployed people;
- 5 points available for absorbing registered learners as permanent staff in own company or another company;
- Must meet SETA requirements to qualify - submission of Workplace Skills Plan and Pivotal Report and priority skills only as recommended by SETA;
- Category F ( uncertified) and Category G (in-house) training both capped at 15% of Total skills spend;
- Legitimate training expenses such as accommodation, catering and travel expense also capped at 15% of total skills spend;
- Mandatory sector training no longer qualifies;
- International training must meet SAQA requirements;
The MICT SETA Perspective

SDFs are to adopt the following principles and practices:

**Only actual or planned direct costs** are to be provided in the ATR/PTR and WSP/PTP. Therefore:
- Opportunity costs are excluded.
- All funds that are acquired from sources external to the organisation (e.g. MICT SETA, Job Fund, etc.) are excluded.
- If the organisation recovers any portion of the expenses from the employee (e.g. loan to learner), the recovered portion of expenses are excluded.

If the funding grant to the learner is conditional, these expenses are excluded, except:
- Where the learner completes his/her studies within the allocated period, these expenses are included. (Conversely, if the learner fails and has to pay these costs back to the organisation, these expenses are excluded).
- If the learner must work for the organisation for the same period equivalent to the period of study, these expenses are included.
- Where the organisation funds a learner and the learner fails, without the learner having to reimburse the organisation, this cost is included.
- Where the organisation funds a learner and the learner fails and the organisation funds the learner rewriting, without the learner having to reimburse the organisation, this cost is included.

All actual and planned costs are to include VAT.

Legitimate training expenses (as above) are:
- Costs of training materials
- Costs of trainers
- Costs of training facilities including costs of catering
- Scholarships and bursaries
- Course fees
- Accommodation and travel and
- 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.

The expenses of an organisation on AET or End-User Computing programmes must be included at a multiple of 1.25 to the actual value. Training expenses of training done outside of South Africa are included. Only expenses that can be supported with evidence (e.g. an invoice, appropriate internal accounting record, verifiable calculation of internal trainer’s hourly rate) are to be included. Despite BBBEE requiring that expenses from Uncertified Learning Programmes or from Category G Learning programmes in the Learning Programmes Matrix (Work experience for unemployed graduates) should not represent more than 15% of the total value of expenses, your ATR/WSP must include the full 100%. No salaries and wages of learners are to be included except:
- If the Learning Programme is a Learnership.
- If the Learning Programme falls within category B, C or D of the Learning Programme Matrix, i.e.:
  - Higher Diploma (With/requiring Workplace Experience)
. National Diploma (With/requiring Workplace Experience)
. National Certificate (With/requiring Workplace Experience)
. Internship
. Articles
. Licensing requirements
. Apprenticeships (Section 13)

Include your organisation’s actual costs in the ATR for training learners against whom your organisation is contributing SDL levies. Include your organisation’s budgeted costs in the WSP for training learners against whom your organisation is contributing or intends contributing SDL levies. The costs of the SDF’s time involved in the skills development process (and ISDF expenses) are included. If not split across all training interventions, this cost can be included in the “Total Actual Expenses” and “Total Budgeted Cost”. See Section Where internal training is performed; use the trainer’s hourly rate multiplied by the number of hours of training for the course to determine the cost.

If you are funding a learning programme that spans the 31 March/1 April point in time, the question is “What belongs to the ATR/PTR and what to the WSP/PTP”. Look at this in terms of what the organisation has paid for or is committed to. “Paid for” obviously belongs in the ATR/PR. If the organisation has committed up front to funding a training intervention, part of which must be paid in the “New Year”, be it to the learner or through agreement with the training provider or internal HR/accounting policy, these costs belong in the ATR/PTR.

This is likely to be the case for learnerships, internships, skills programmes, and University of Technology and University qualifications and bursaries. Note though, regarding degrees, diplomas and bursaries that span more than one year, these should be treated on a year-by-year basis. So, for example, if your organisation decides to sponsor a student to do a three-year degree, and assuming that this commitment was made in September last year, the first-year costs would go into the ATR/PR, and only the estimated second –year costs would go into the WSP. If not “committed”, you need to pro-rata the costs, allocating a portion to the ATR/PR and a portion to the WSP/PTP. In this case, you would declare the same training intervention in both the ATR/PR and in the WSP/PTP, but the sum of the actual cost and budgeted cost would equal the total cost of the training intervention.

This is more likely to happen with one person going on say three courses, one or two being conducted in the “New Year”.

- E-Learning. In this case, if there were/will be costs associated with the purchase of any specialised software and hardware specifically to be used for the purposes of training, contact your Finance Department and ask them to inform you what the value of these costs will be written off for the year, and use that amount.

- Some international organisation use guidelines on how to calculate the cost of training, based on their own research and experience, and apply this across all their international branches/partners. As long as the relevant evidence can be provided, this approach is acceptable.

If there are other costs not included above that you are unsure of, please contact the appropriate MICT SETA staff member.

Please retain records of your cost determinations in case the MICT SETA audits your organisation or requires them for verification with the Auditor General.

25
MICT SETA SSP Staff Support

Communication with the MICT SETA

All communication with the MICT SETA SSP staff must occur

- through the approved registered SDF
- via email
- the email must have the L number of the organisation in the subject line of the email
  
- Please note: No correspondence from SDF Associates please

The MICT SETA SSP Division Service Levels

With regards SDF procedural queries, complaints, assistance to register and approval thereof, Inter-SETA transfers and registration of new organisations, the MICT SETA SSP staff will strive to resolve these issues within reasonable time. 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 MICT SETA SSP staff will strive to resolve these issues within 3-working days.

Inter-SETA Transfers

Background

An Inter-Seta Transfer (IST) is the process of transferring an organisation from one SETA to the other. The transfer may be done under any of the following circumstances:

- The Organisation has been incorrectly registered with the SETA as the main business activity does not match the industrial scope of the SETA.
- The main business of the enterprise has changed since the previous registration with SARS and now better suits the industrial scope of another SETA.
- The employer falls within the jurisdiction of more than one SETA, and the employer’s application to transfer to the new SETA is motivated by:
  - the composition of the workforce,
  - the amount of remuneration paid or payable to the different categories of employees; and
  - the training needs of the different categories of employees.

Inter-Seta Transferring Process

If you are transferring into the MICT SETA, you need firstly to contact CIPC (012 394 9500, http://www.cipc.co.za/) to change your SIC code to one of MICT SETA’s SIC codes which are legislated, as mentioned in Section above. The list of MICT SETA SIC codes, in a file titled “MICT SETA SIC codes”, can be found under the following link:


Should the organisation wish to move from another SETA to the MICT SETA, an IST-01 form must be completed and submitted to the SETA that the organisation is currently registered with. If you wish to move out of the MICT SETA to another
SETA, the IST-01 form must be completed and submitted to the MICT SETA. The IST-01 form can also be found at the link above.

Once received, the SETA will approve the application if the request is justified, and forward the signed application to the Department of Higher Education & Training (DHET). The DHET then verifies the request and submits the form to the South African Revenue Services (SARS) who will ultimately process the change. Note that this process will take about three-six months.

It is ultimately the responsibility of the transferring organisation to ensure that it is registered with the correct SETA and to monitor the process through to completion. Nevertheless, if this process is taking beyond six months, the SDF can email the appropriate MICT SETA SSP staff; the SETA will then enquire on the status of the transfer.

When transferring into the MICT SETA, after the IST-01 has been signed by the SETA from which the organisation is transferring, the SDF must request a scanned copy of the signed IST-01 from that SETA. The SDF should then enquire, on a monthly basis, via email with the appropriate MICT SETA SSP staff as to whether the organisation has appeared in the MICT SETA Online Grant System. A scanned copy of this signed IST-01 form must be attached to the email.

When the SDF has been informed that the organisation has appeared in the MICT SETA Online Grant System, the SDF must register as the appointed SDF of the organisation.

If the ATR/WSP/PTP of the organisation was submitted to and was approved by the SETA from which the organisation was transferring and wants to continue receiving its Mandatory Grant for the year, the SDF must email the appropriate MICT SETA SSP staff with evidence that this was the case. When the SDF has been informed that the organisation has appeared in the MICT SETA Online Grant System, the SDF must request that the system be opened so that the SDF can capture the WSP only for this year. On successful submission of this WSP and on the SDF informing the appropriate MICT SETA SSP staff member that the WSP has been successfully submitted, the MICT SETA will consider the approval of the WSP so that the organisation will now receive its Mandatory Grants from the MICT SETA.

**Implications on the Payment of Mandatory Grants**

As indicated above, the Inter-Seta transfer process takes about three-six months. While the organisation is still with the previous SETA, that SETA will continue to pay the Mandatory Grant until transfer is affected. Once effected, the relevant levy contributions of the organisation will be transferred to the MICT SETA, and after approval of the WSP submitted in the MICT SETA Online Grant System, the MICT SETA will continue to pay the Mandatory Grants for the remainder of the financial year, on a quarterly basis.

**Submission of the Inter seta transfer companies**

Where it appears that the Inter-Seta Transfer may be effected during the ATR/WSP Report submission period, there is often concern as to which SETA the SDF should submit. Ideally, the Inter-Seta Transfer Process should be performed during the period June to December, in which case the SDF should submit to the SETA from which the organisation is transferring, and follow the process explained below.
If the SDF wants to start the process between January and May, the SDF will still have to submit to the SETA from which the organisation is transferring (as a precaution against losing the next year’s Mandatory Grant), but will also have to submit to the MICT SETA during the year when the SDL number is reflecting on the system.

The SDF must enquire, on a monthly basis, via email with the appropriate MICT SETA SSP staff as to whether the organisation has appeared under its own L number in the MICT SETA Online Grant System. When the SDF has been informed that the organisation has appeared in the MICT SETA Online Grant System under its own L number, the SDF must request to submit the WSP/PTP.

Note that the MICT SETA cannot pay Mandatory Grants against the T number.

**Newly Registered Organisations**

In the event a newly registered organisation with SARS joins the MICT SETA, this organisation has six months, from date of registration with SARS to submit its Workplace Skills Place (WSP) to the MICT SETA. Only the WSP/PTP must be completed for the first year. The SDF should enquire, on a monthly basis, via email with the appropriate MICT SETA SSP staff as to whether the organisation has appeared in the MICT SETA Online Grant System.

A scanned copy of the organisation’s SARS registration document (EMP103) must be attached to the email. When the SDF has confirmed that the organisation has appeared in the MICT SETA Online Grant System, the SDF must request that the system be opened so that the SDF can capture the WSP only. On successful submission of this WSP and on the SDF informing the appropriate MICT SETA SSP staff member that the WSP has been successfully submitted, the MICT SETA will approve the WSP so that the organisation will now receive its Mandatory Grants from the MICT SETA.

**Registered Organisations not allocated to a SETA**

There are instances where an organisation realises that it is not allocated to a SETA, or is not aware of what SETA it belongs to and wants to start participating in the skills development process. In this case, the organisation must email the appropriate MICT SETA staff members its SDL number or PAYE number as per your EMP 201 form available from your Finance Department. These numbers have the format “SDL Number: Lxxxxxxxxx”, “PAYE Number: 7xxxxxxxxx”, where “x” is a numeric.

Where the organisation is not associated with any SETA, the organisation needs follow the Inter-Seta Transfer process and email the IST-01 to the appropriate MICT SETA SSP staff member.

**Companies that have skipped a year in submitting**

Organisations that submit for the first time, or have skipped a year, only submit the WSP/PTP.
Listing yourself as an approved MICT SETA ISDF

ISDFs wishing to list themselves in the ISDF Database must email a copy of their curriculum vitae and qualifications to the appropriate MICT SETA staff member, with the following additional details:

- First Name:
- Surname:
- Phone:
- Cell:
- Fax:
- Email:
- Suburb:
- Town/City:
- Province:

If approved, the ISDF details will be added to the ISDF Database. If these details need to be updated at any stage, please email the appropriate MICT SETA staff member. Please note that the MICT SETA has been requested to provide the contact details of its stakeholders, be they levy-paying or not. We view all data provided to us, including contact details, as being strictly confidential, so unfortunately we cannot assist. We place the ISDF Database on our website for these stakeholders to utilise.

Registering SDF Associates

SDF Associates used to be known as “Secondary SDFs” in the old system. SDF Associates are people that can gain access to the organisation’s data on the MICT SETA Online Grant System, but they do not have “write” or “edit” access like the SDF. Instead, they only have “read-only” access. SDF Associates must follow the same registration process as SDFs.

Technical Queries Regarding the Online Grant System

If you encounter a technical problem with the MICT SETA Online Grant System, please take a screenshot (by holding down the “fn” key and pressing the “prt sc” key) of the screen where the problem occurs, pasting it into an email, and send this with a short description of the problem to the appropriate MICT SETA SSP staff member. Your query will then be logged with our Online Grant System service provider and we will keep you informed of developments. Please first refer to “Troubleshooting”, Section.

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. Please email this request to the appropriate MICT SETA SSP staff member.

Grant Payment Queries

For all Mandatory Grants payments, please contact Sphesihle Hlongwane: E-mail address: sphesihle.hlongwane@mict.org.za Tel no.: 011 207 2640.
SDF Telephonic and/or Person-to-Person Training

The MICT SETA offers telephonic and/or person-to-person training on the Online Grant System to new SDFs. Should you feel you need such training, please contact one of the MICT SETA SSP Staff via email.

Linking of Organisations

Where there is more than one organisation in a group of organisations, SDFs sometimes prefer to submit one ATR/WSP report for all these organisations rather than submit a report for each individual organisation. In this instance, the SDF needs to identify which organisation is the parent and request the MICT SETA to link the remaining “children” to the parent. Subsequent ATR/WSP Reports will then be captured and submitted under the main company’s L Number.

Skills development levy contributions can still be contributed to each L number if you wish because once the parent is approved, Mandatory Grants will be paid to all L numbers that have contributed.

The request for linking of the L Numbers must be emailed to Karabo Mokwena at karabo.mokwena@mict.org.za

SDF Training Workshops

Once a year, usually around February, the MICT SETA conducts a series of workshops in Gauteng, Durban, East London/Port Elizabeth and Cape Town. At these workshops, SDFs are guided through the latest version of the Online Grant System, as well as addressing any other queries or concerns that SDFs may have. SDFs will be informed of these events via email. SDFs and other interested personnel in the MICT SETA stakeholder organisations are encouraged to attend these workshops.

Accredited Training Providers

The MICT SETA has a list of the MICT SETA-accredited training providers on its website at www.mict.org.za, under the “Accreditation/Assessment” link, it is suggested that employers contact these training providers should the need arise. The MICT SETA cannot be seen to be supporting any one particular training provider.

Mandatory Grants and Mandatory Grant Payment Schedule

A Mandatory Grant is a reimbursement on a levy contributed by the organisation. It is not viewed as income to an organisation and therefore is not taxable; it is purely intended for the training of employees. The MICT SETA does not provide statements. Please refer to the Grants and Levies form in the Online Grant System for any required evidence. The following figure illustrates the MICT SETA grant payment schedule, based on quarterly payments. The MICT SETA disburses Mandatory Grant payments in:

- September based of the organisation skills development levy contributions received by the SETA from DHET/SARS for the period 1st April to 30th June,
- in December based of the organisation skills development levy contributions received by the SETA from DHET/SARS for the period 1st July to 30th September,
- March based of the organisation skills development levy contributions received by the SETA from DHET/SARS for the period 1st October to 31st December, and
– June based of the organisation skills development levy contributions received by the SETA from DHET/SARS for the period 1st January to 31st March.

The details of what levy contributions have been made by the organisation and what Mandatory Grants the MICT SETA has paid to the organisation are available in the Online Grant System. Mandatory Grant payments will only be made if the SETA has approved the ATR/WSP, and banking details are in order. Note that Discretionary Grants will be paid as outlined in the SLA between the MICT SETA and the organisation. The details of Discretionary Grant transactions are not, at this stage, presented in the Online Grant System.

Information on MICT SETA Scarce and Critical Skills

Should SDFs require information regarding the Critical and Scarce Skills in the MICT sector, please download our Sector Skills Plan and the Priority list from our website under Sector Skills Planning; and then click on Other relevant documents.

Applying for Discretionary Grant Funding

Introduction

As indicated above, 49.5% of the levy contribution from employers is allocated to the Discretionary Grant. This money is utilised at the discretion of the SETA to sponsor learning programmes with employers who request sponsorship and who intend implementing learning programmes that support the strategy of the SETA. A Discretionary Grant is that is allocated to a levy paying company to develop the skills of both the employed and unemployed people. A Discretionary Grant is not viewed as income to an organisation and therefore is not taxable.

The 2013/18 Strategy of the MICT SETA

A summary of the MICT SETA 2013/18 NSDS III strategic goals that relate to Discretionary funding are:

– FET learners supported through bursaries.
– Universities and Universities of Technology learners supported through bursaries.
– Middle level skills programmes implemented.
– Learner progression implemented through Learnerships including townships and rural.
– Students supported through internship programmes of which at least 70% placed.
– Work experience offered to college learners through Internship programmes.
– Provision of quality short courses agreed by top 10 MICT stakeholders in each subsector.
– Provision of quality skills programmes agreed by top 10 MICT stakeholders in each subsector.
– Short course projects in place to address specific sector skills gaps.
– Skills programme projects in place to address specific sector skills gaps.
– Skills development with SMEs through internship/learnership programmes.
– Skills development with selected trade unions, NGOs and community-based organisations expanded through partnership NSF funding.
The Discretionary Grant Evaluation Committee and Process

The MICT SETA has a Discretionary Grant Evaluation Committee (DGEC) comprising the Senior Managers of the Learning Programmes Division, the Quality Assurance Division, the Sector Skills Planning (SSP) Division and the DGEC evaluates all Letters of Intent (a proposal from the employer requesting sponsorship). If recommended for approval by the DGEC, this recommendation is forwarded to the CEO of the MICT SETA who will usually approve the request for sponsorship. Once approved by the CEO, the Learning Programmes Division will compile a draft Service Level Agreement based on the content of the Letter of Intent, and email it to the applicant. This process takes about one month.

Based on whether the employer wants some changes to the SLA, the final draft of the SLA is signed by the MICT SETA representative and the employer SLA representatives, then returned to the MICT SETA. This process usually takes about one month.

Criteria for Applying for a Discretionary Grant

The DGEC uses the following criteria to assess whether to recommend the Letter of Intent (LOI).

- The details specified on the LOI are correct in terms of the employer’s data that the MICT SETA has within its system (e.g. name of the applying employer and L number are the same as that in the Seta Management System).
- The ATR/WSP of the applying employer has been approved by the MICT SETA.
- The training specified in the LOI is the same as has been specified in the WSP, and is it related to and has been specified as a PIVOTAL learning programme (in the case of the 80% of funding that the MICT SETA must allocate to Discretionary) and/or as a Scarce or Critical Skill.
- The application must relate to the MICT SETA’s Equity targets, namely Black 85%; White 15%; Female 54%; People with Disability 4%.
- The employer has been/is contributing levies to the MICT SETA.
- The number of unemployed learners that the employer intends training must amount to no more than 20% of its own staff complement? Employers conducting the End-User Computing learnership are exempt from this condition.
- The organisation has achieved at least a 70% placement on the previous MICT SETA sponsored learning programmes. Employers conducting the End-User Computing learnership are exempt from this condition.
- The training provider that the employer intends using has been accredited (applicable only for learnerships and skills programmes).
- The LOI carries the signature of the SDF of the applying employer.

The DGEC also uses the following considerations to assess whether to recommend the Letter of Intent. Including comments on the following in the motivation section of your LOI would assist in this regard.

- What other training has been specified in its WSP, and what additional LOIs is the employer likely to submit to the MICT SETA for further Discretionary funding?
- What is the total budget specified in the WSP, how does this relate to the anticipated Mandatory Grant that the organisation will receive back during the year, and how much of this LOI training could be covered by
the Mandatory Grant? In reviewing the Mandatory Grant, if, for example, the employer applies in April to June (the MICT SETA’s new financial year), the MICT SETA would review the previous year’s levy contributions to estimate what Mandatory Grant is likely to be received by the employer, but the employer must commit to including the training interventions applied for in the forthcoming June submission. Also, if, for example, the employer applies in January to March for the forthcoming year, the employer must again commit to including the training interventions applied for in the forthcoming June submission.

Applying for Discretionary Grant

*No employer should start any training before the SLA is signed by all relevant parties.* As implied above, at least two months should be planned for the application process, from date of submission to the MICT SETA through to the signing of the SLA. Employers wishing to apply for sponsorship can do so at any time during the year.

Employers can apply for only one type of learning programme per LOI. The SLA will similarly be for one type of learning programme only. The types of learning programmes are learnerships, internships, skills programmes, full tertiary qualifications and short courses. Also, if the employer intends applying for funding for say two different learnerships and two different internships, this will be done through separate LOIs – four LOIs in this case.

Note that in the past, the MICT SETA has taken the view that short courses should be funded by the organisation from its Mandatory Grant – this may be reviewed since the Mandatory Grant has dropped to 20% of levy contributions. Employers can submit an LOI for a training programme even if a current programme that is being sponsored by the MICT SETA has not yet concluded.

Discretionary Grant Amounts

The following table presents a summary of the learning programme costs that the MICT SETA uses in conjunction with its evaluation and recommendation of the LOI to the CEO.

<table>
<thead>
<tr>
<th>Type of Programme</th>
<th>Training Grant per Learner</th>
<th>Allowance per Learner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learnership</td>
<td>R 35,000.00</td>
<td>R 18,000.00/12 = R 1,500.00 per month</td>
</tr>
<tr>
<td>Internship</td>
<td>R 28,000.00</td>
<td>R 42,000.00/12 = R 3,500.00 per month</td>
</tr>
<tr>
<td>Skills Programme</td>
<td>R 38,000.00</td>
<td>R 0.00</td>
</tr>
<tr>
<td>Short Course</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bursary</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note that VAT is not applicable to the grants or allowances.*
## Discretionary Grant Disbursements

**Learnership (including AET and End-User Computing)**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Disbursement Split</th>
<th>Required Items</th>
</tr>
</thead>
</table>
| First Disbursement     | 30%                | - Learnership Agreements, Fixed Employment Contracts and ID Copies.  
- Programme Roll-Out Plan (Programme Plan with Activities Schedule per units standard).  
- Uploading learners details on MICT SETA MIS Systems.  
- 1st Invoice, with cancelled organisational blank cheque.  
- List and details of selected learners.  |
| Second Disbursement    | 20%                | - 1st Quarterly Progress Report, based on approved roll-out plan, as per clause 7.  
- Site Visit report by MICT SETA (Uploading of Learner assessment results on MICT SETA MIS Systems).  
- 2nd Invoice.  |
| Third Disbursement     | 20%                | - 2nd Quarterly Progress Report, based on approved roll-out plan, as per clause 7.  
- Site Visit report by MICT SETA. (Uploading of Learner assessment results on MICT SETA MIS Systems).  
- 3rd Invoice.  |
| Fourth Disbursement    | 30% Allowances 15% Grant | - 3rd Quarterly Progress Report, based on approved roll-out plan, as per clause 7.  
- Site Visit report by MICT SETA. (Uploading of Learner assessment results on MICT SETA MIS Systems).  
- 4th Invoice.  |
| Fifth Disbursement     | 15% Grant Only     | - Uploading of Learners Assessments on MICT SETA MIS Systems and Submission of Moderation reports.  
- Verification report and Quality Assurance approval by the MICT SETA ETQA, for Learners’ certification.  |
| Programme Termination  |                    | - Full comprehensive progress report with students’ database, including their contacts details.  
- The Programme impact analysis, which will include learners’ employment status upon completion of Learnerships.  |

## Internship Programme

<table>
<thead>
<tr>
<th>Activity</th>
<th>Disbursement Split</th>
<th>Required Items</th>
</tr>
</thead>
</table>
| First Disbursement     | 30%                | - Internship Agreements, Fixed Employment Contracts and ID Copies.  
- Programme Roll-Out Plan (Programme Plan with Activities Schedule per units standard).  
- Uploading learners details on MICT SETA MIS Systems.  
- 1st Invoice, with cancelled organisational blank cheque.  
- List and details of selected learners.  |
| Second Disbursement    | 20%                | - 1st Quarterly Progress Report, based on approved roll-out plan, as per clause 7.  
- Site Visit report by MICT SETA.  
- 2nd Invoice.  |
| Third Disbursement     | 20%                | - 2nd Quarterly Progress Report, based on approved roll-out plan, as per clause 7.  
- Site Visit report by MICT SETA.  
- 3rd Invoice.  |
| Fourth Disbursement    | 30%                | - 3rd Quarterly Progress Report, based on approved roll-out plan, as per clause 7.  
- Site Visit report by MICT SETA.  
- Completion Report.  
- Final Report.  |
Skills Programme

<table>
<thead>
<tr>
<th>Activity</th>
<th>Disbursement Split</th>
<th>Required Items</th>
</tr>
</thead>
</table>
| First Disbursement | 30% | - Skills Programme Agreements, Fixed Employment Contracts and ID Copies.  
                        - Programme Roll-Out Plan (Programme Plan with Activities Schedule per units standard).  
                        - Uploading learners details on MICT SETA MIS Systems.  
                        - 1st Invoice, with cancelled organisational blank cheque.  
                        - List and details of selected learners. |
| Second Disbursement  | 20% | - 1st Quarterly Progress Report, based on approved roll-out plan, as per clause 7.  
                                   - Site Visit report by MICT SETA (Uploading of Learner assessment results on MICT SETA MIS Systems).  
                                   - 2nd Invoice. |
| Third Disbursement  | 20% | - 2nd Quarterly Progress Report, based on approved roll-out plan, as per clause 7.  
                                    - Site Visit report by MICT SETA. (Uploading of Learner assessment results on MICT SETA MIS Systems).  
                                    - 3rd Invoice. |
| Fourth Disbursement  | 15% | - 3rd Quarterly Progress Report, based on approved roll-out plan, as per clause 7.  
                                       - Site Visit report by MICT SETA. (Uploading of Learner assessment results on MICT SETA MIS Systems).  
                                       - 4th Invoice. |
| Fifth Disbursement  | 15% | - Uploading of Learners Assessments on MICT SETA MIS Systems and Submission of Moderation reports.  
                                      - Verification report and Quality Assurance approval by the MICT SETA ETQA, for Learners’ certification. |

The MICT SETA does provide discretionary funding for short courses. Please contact the Senior Manager: Learning Programmes for further information if required.

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.

Introduction

A web-based Online Grant System is being used for submissions. It is designed to assist SDFs in capturing and submitting ATR/PTR and WSP/PTP data electronically. Internet Explorer 9, Firefox, Waterfox and Google Chrome can all be used to access the MICT SETA Online Grant System, should you experience some difficulties in accessing the System using these browsers, please try Internet Explorer 9 or phone Karabo Mokwena or Sphesihle Hlongwane at 011 207 2600. Note that if you use Internet Explorer 8, there are will be some quirks.

When an organisation changes existing information on the System, the SDF is required to have the information on the MICT SETA Online Grant System amended/updated.

Note that the ATR/PTR reflects the actual training from 1st April 2017 to 31st March 2018.
Registering with the MICT SETA as an SDF

If you have already registered with the MICT SETA as an SDF, please proceed with the capturing of the ATR/PTR and WSP/PTP on the OGS system. New SDFs are required to first register on the MICT SETA Online Grant System.

If you are replacing a previous SDF, the previous SDF will be automatically removed. Prior to registering on the On-Line Grant System, the SDF must:

- Compile a letter of appointment, on the letterhead of the client organisation that the SDF is representing. An example of this letter is provided in Appendix 1.

- The letter of appointment must contain the newly appointed SDF contact details and I.D. Number, and must confirm that he/she has been appointed by the organisation.

- This letter must be signed by either/or the M.D, the Finance Director or the Human Resource Director. Once the SDF has this letter, the SDF must scan the letter and rename it without changing the suffix (yyy) of the file name to “Letter of Employment Lxxxxxxxxx.yyy” (where “Lxxxxxxxxx” is the L number of the organisation.

- The letter of appointment must be saved on your computer in order to upload it into the On-Line Grant System as part of the registration process described below.

- The SDF can also email the MICT SETA Skills Advisors for assistance. First time SDFs must go to the MICT SETA website: www.mict.org.za, then click on “SDF Login” which is (will be) situated in the top right hand corner.
1. SDF Registration

First time SDF/ISDFs must go to the MICT SETA website: www.mict.org.za, then click on “Skills Planning Login/Stakeholder Login” which is situated on the top right hand corner.

- The user will then be transferred to the SETA management System Logon page, as presented below.

- For **NEW SDF registration** you will be required to capture your details on the system. To **register as a new SDF**, click on “Register an SDF” highlighted from the above screen.

- At the top of the page, there is a dropdown within which you must specify if you are an SDF or an ISDF.
- Select SDF or ISDF and click on register button.

**Step 1. Applicant Details**

- This section will require your personal details such as your name, surname, ID number, address etc.
Complete the fields on the above screen and click on save and proceed button to save the information and move to the next step.

**Step 2. Codes of conduct**

To download the code of conduct, click on “download code of conduct” hyperlink from the above screen.

Upload the signed code of conduct by clicking on choose file button. Click on save and proceed to move to the next step.
Step 3. Organisation Details

- This section 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.

To link to an organisation, the user must click on the search button next to organisation.

The system will open a dialog box for you to search for an organisation.

The user must enter the SDL number of the organisation they will be submitting WSP, PTP and ATR, PTR forms for.
Complete the set of questions below:

- Consultant acting for Employer? [ ]
- Will you perform your SDF functions in respect of [ ]
- Please indicate method of appointment to SDF position [ ]
- Other method of appointment [ ]
- Are you replacing the previous primary SDF of this Company? [ ]
- Are you registering as secondary SDF for this Company? [ ]

Once done, you must upload your letter of appointment by clicking the choose file button highlighted on the below screen, the choose file button will take you to your documents. Select the appointment letter and then click on Upload button to save.
– The added organisation information will reflect on the screen below:

![Screen with added organisation information]

– The SDF can add more than one company on the above screen.
– Click on finalize application button to submit the SDF application.

![Screen with finalized application]

– The system will generate an acknowledgement letter below:

![Acknowledgement letter example]

Dear [Name],

Your Registration dated 2013/12/03 is hereby acknowledged. The outcome will be communicated to you thereafter.

Company Name: [Company Name]
SDL Number: [SDL Number]
SDF Role: [SDF Role]

Henceforth your User Details:
Username: [Username]
Password: [Password]

Should you require additional information please contact MICT

Yours Sincerely,
MICT Skills Division
Note that on completion of the registration process, you do not have access to the system yet. This is because the SSP Advisor at the MICT Seta will have to go through your details and accept or reject your registration. An automated confirmation email message will then be sent to the SDF.

The SDF/ISDF will now be able to access the system.
2. Logging on
The SDF/ISDF will log into the SETA Management System, with his/her **username and password.**

- If you have forgotten your logging details, you can click on “Forgot Password” hyperlink:

- Enter your **username** on the screen below to get your password then click on reset **password button:**
Registered SDF’s, Employers and Providers: When logging in for the first time, the system will request a password update/reset. Ensure the combination is per example: Minimum 8 characters, at least one capital letter and one special character (e.g. Password@2017)

The system will generate an email with your new password:

3. 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”.
*Note: To access your organisation detail, please select the Skills Tab to enable the search for your organisation using the SDL number.

i) 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 WSP, PTP and ATR, PTR.

Dashboard Tools
   – Under the financial year section there is a facility for the registered SDF/ISDF to Register (Add) a new organisation or remove an existing organisation, as well as a facility to change your details.

List of Companies to which the SDF/ISDF is linked

<table>
<thead>
<tr>
<th>Legal Name</th>
<th>SDL Number</th>
<th>Access Status</th>
<th>Grant Status</th>
<th>Grant Due Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Testing</td>
<td>X0000000001</td>
<td>Created</td>
<td></td>
<td>30/04/2014</td>
<td></td>
</tr>
<tr>
<td>Zimele Training</td>
<td>T0000000001</td>
<td>Approved</td>
<td>Created</td>
<td>30/04/2014</td>
<td></td>
</tr>
</tbody>
</table>

   – 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.
   – Select the company you want to access and click on action button

The MICT SETA SDF Reference Manual 2018
4. 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 in the database.
   - The MICT Seta data allows the SDF/ISDF to edit and update the organisation’s information.
   - The MICT Seta 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 the MICT Seta.
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.

*Note that the number of employees will be populated from the employment profile that is captured for the 01 April 2017-31 March 2018 on form 1

5. Approved SDF

– 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.

* Note that the SDF must confirm their contact details every financial year. As the system will not allow the SDF to create the current financial year.
6. The “Org Contacts” Tab

- This tab is available throughout the year to SDFs.
- SDFs are to reconfirm the information on this page
- This screen is for SDFs/ISDFs to capture people that could be a point of contact for the MICT Seta 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 for the cell phone number. Note: For organisations that have 50 or more employees, include CEO, Finance Manager and HR Executive.
- The system will prompt you to complete and confirm all your Organisation details and contact details before you can access the WSP, PTP and ATR, PTR forms.
- *Please note that each and every year the system is now going to require the SDFs to confirm the details on this page before you can access the WSP/ATR and PTP/PTR.

7. The “Org Bank Details” Tab
- This section allows you to add the company's baking details.
- NEW: Please note that each and every year the system is now going to require the SDFs to confirm the details on this page before you can access the WSP/ATR and PTP/PTR.

8. The “Training Committee” Tab
- This tab is available throughout the year to SDFs. If any changes occur, please update this tab as soon as the changes occur.
- 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 employee representative and/or at least one union representative
- NEW: Please note that each and every year the system is now going to require the SDFs to confirm the details on this page before you can access the WSP/ATR and PTP/PTR.
- To add the training committee member please click on “Add Training Committee” button:
9. The “WSP/ATR and PTP/PTR Forms” Tab
   - The “WSP & ATR Forms” 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.

10. Creating WSP
    - Creating a New WSP for a New Year
       - The section (Financial Year) is only active when a new form needs to be created for a new SDL year. Make sure that your organisation information page, baking
details, Approved SDF details, training committee and organisation contact are confirmed before creating a new year.

– To create the new forms, click on the current year (1 April 2018 -31 March 2019) on the drop-down list and click create button. Or when the financial year default to 2018/2019 click on the create button.

– Then the following screen will be presented. Click on the created financial year which will turn blue and then click on your far left the tab written WSP/ATR and PTP/PTR above the text written financial year then the forms will be opened starting employment profile.

– A new row will be added for the new financial year.

. **Printing a WSP/PTP/ATR/PTR Report (Must show current year)**

  - The Print Reports option is available and allows you to print the forms that you have completed by clicking on the icon.

. **WSP (Workplace Skills Plan) Forms**

  - The SDF/ISDF should select “WSP Forms” for the new financial year on the “select 18/19” button.
The SDF/ISDF can now proceed with populating the various forms with data.

**WSP/PTP Current Employment Profile**

- Please capture all employees for whom you pay SDL.
- Male and Females must include disability. Disability must be specified separately: 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” = Sum of “Skill Level”.
- 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.

**Excel Importer:**

- If you want to upload data using the excel spreadsheet, click on Excel importer button:
Download the Excel template and complete it offline.

Click on choose file button to upload the spread sheet that you have completed.

Click on import button

Display :

WSP/PTP Training Budget

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.

- Complete the form and click on save button:

- Display:

  . WSP/PTP Scarce Skills

- Scarce skills represent a demand for personnel currently unavailable for occupations in organisations. Scarce skills therefore represent opportunities for unemployed people.
Complete the fields below and click on add button to save:
N.B If you have selected “NO” on the field “Are there any plans to recruit from outside the republic?” please ensure to enter the value 0 on the field below.

Critical Skills

- **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.

Complete the compulsory fields and click on add button:
. Annual Payroll

Enter the Total Annual Payroll for all employees for whom you pay SDL for the period 1\textsuperscript{st} April 2016 to 31\textsuperscript{st} March 2017, the click “save button”.

. WSP Planned Training

This form is for the WSP training, which is the following 2 learning types:
- Graduate Internships
- Short Courses
– 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.
– Age Group has three fields, namely less than 35 (<35), 35 to 55, and greater than 55 (>55).
– Municipality must be the municipality within which the employee is based/employed. There is a facility associated with Municipality which will assist SDFs to select the correct Municipality based on town name or postal code. It is suggested that postal code is the easiest way to go.
– Click on create button to complete the form or you can use the Excel importer to upload the information using the spread sheet.

<table>
<thead>
<tr>
<th>#</th>
<th>Form</th>
<th>Description</th>
<th>Due Date</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Form 1</td>
<td>WSP/PTP - Employment Profile 01 April 2017 - 31 March 2018</td>
<td>30/04/2018</td>
<td>Select</td>
</tr>
<tr>
<td>2</td>
<td>Form 2</td>
<td>WSP/PTP - Training Budget</td>
<td>30/04/2018</td>
<td>Select</td>
</tr>
<tr>
<td>3</td>
<td>Form 3</td>
<td>WSP/PTP - Scarce Skills 01 April 2016 - 31 March 2019</td>
<td>30/04/2018</td>
<td>Select</td>
</tr>
<tr>
<td>4</td>
<td>Form 4</td>
<td>WSP/PTP - Critical Skills 01 April 2016 - 31 March 2019</td>
<td>30/04/2018</td>
<td>Select</td>
</tr>
<tr>
<td>5</td>
<td>Form 5</td>
<td>WSP/PTP - Annual Payroll 2017/2018</td>
<td>30/04/2018</td>
<td>Select</td>
</tr>
<tr>
<td>6</td>
<td>Form 6</td>
<td>WSP - Planned Training 01 April 2018 - 31 March 2019</td>
<td>30/04/2019</td>
<td>Select</td>
</tr>
<tr>
<td>7</td>
<td>Form 7</td>
<td>PTP - Planned Training 01 April 2018 - 31 March 2019</td>
<td>30/04/2019</td>
<td>Select</td>
</tr>
<tr>
<td>8</td>
<td>Form 8</td>
<td>ATR - Actual Training 01 April 2017 - 31 March 2018</td>
<td>30/04/2019</td>
<td>Select</td>
</tr>
<tr>
<td>9</td>
<td>Form 9</td>
<td>PTR - Actual Training 01 April 2017 - 31 March 2018</td>
<td>30/04/2019</td>
<td>Select</td>
</tr>
<tr>
<td>10</td>
<td>Form 10</td>
<td>ATR/PTR - Training Budget Score</td>
<td>30/04/2019</td>
<td>Select</td>
</tr>
<tr>
<td>11</td>
<td>Form 11</td>
<td>ATR/PTR - Variance Report</td>
<td>30/04/2019</td>
<td>Select</td>
</tr>
<tr>
<td>12</td>
<td>Form 12</td>
<td>Organisation Survey on Workforce Dynamics</td>
<td>30/04/2019</td>
<td>Select</td>
</tr>
<tr>
<td>13</td>
<td>Form 13</td>
<td>ATR/PTR - Impact Assessment</td>
<td>30/04/2019</td>
<td>Select</td>
</tr>
</tbody>
</table>

– Display:
Planned - Pivotal Training

- This form is for PIVOTAL training, which is the following learning types:
  - AET/End User
  - Apprenticeships
  - Bursaries
  - Learnerships
  - Professional Placements
  - Skills Programme
  - Workplace Experience Placements

- This form is OFO based like WSP planned training form.

- Click on create to add complete the form or use the excel importer to upload the information using the spread sheet.
Complete the compulsory fields and click on add button:

Display:

- **ATR Actual Training**
  - This form is very similar to the WSP Planned Training form mentioned previously, except that actual data relating to the most recent Skills Year must now be specified.
  - The form is the report for the following learning types:
- Graduate Internships
- Short Courses
- Click on create button to complete the form or use excel importer to upload the information using the spread sheet.

Complete the fields below and click on add button:

Display:

. PTR Actual Training
- This form is very similar to the Pivotal Planned Training form mentioned previously, except that actual data relating to the most recent Skills Year must now be specified.
- The form is the report for the following learning types:
  - AET/End User
  - Apprenticeships
- Bursaries
- Learnerships
- Professional Placements
- Skills Programme
- Workplace Experience Placements

- Click on create button to complete the form or use excel importer to upload the information using the spreadsheet.

- Complete the fields below and click on add button:

- Display:
. ATR /PTR Training Budget Spent

- Please ensure that the Training Spent amount specified is not less than the amount spent on the Training Intervention forms
- Click on select button to access the form.

- The system is going to auto calculate the amount spent on ATR and PTR training:
Complete descretionary grants received for 2017/2018 field and click on save button.

- Display:

ATR /PTR Variance Report

- Where the Total Trained differs from the Total Planned 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. If you select "Other" you will not be able to select a second or third option, but a text box will open where you can enter your reason.

- The range of Reasons presented by the system is:

<table>
<thead>
<tr>
<th>Budget Constraints</th>
<th>Change in Company Objectives</th>
</tr>
</thead>
<tbody>
<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>
. Organisation Survey on Workforce Dynamics

Answer all questions in the survey by selecting the relevant answer option from the drop down menu next to each question. Do not forget to “SAVE” at the bottom before closing the form.

. ATR /PTR Impact Assessment

Answer all the following questions. Each question has its own rules which the system will prompt for if not followed. Do not forget to “SAVE” before closing the form.

10 The WSP/PTP and ATR/PTR Document Uploads Tab

The “Document Uploads” Tab allows the SDF or ISDF to upload the signed Authorisation Form obtainable from the WSP/PTP and PTP/PTR dashboard
“Note: The information on the authorisation is populated from tabs confirmed on the system. Please make sure that you capture correct information.

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”.
- If you incorrectly upload a document, please email the details to your SSP Advisor.
- The following figure shows what will be presented when the “Document Uploads” tab is clicked.

11 Submission of WSP/PTP and ATR/PTR
- Note that when you are ready to submit, all the WSP/PTP and ATR/PTR data must have been captured your fully signed Authorisation Form (available from the WSP/PTP and ATR/PTR tab) must have been uploaded.
When you click the “Submit WSP/ATR” button on the screen below, both the WSP/PTP and ATR/PTR forms are submitted into the system.

Note also that if you submit your WSP/PTP and ATR/PTR forms using the on-Line Grant System, you will immediately receive a system-generated acknowledgement of receipt letter via email.

No manual submission allowed completely.

12 Approval Criteria for WSP/ATR, Authorisation Form and Banking Details

"Approved" status will be granted once the MICT Seta Advisors have checked that:

- The ATR/WSP submission occurred before midnight 30 April.
- The Authorisation Form is fully completed and signed has been uploaded by midnight 30 April.
- The Authorisation Form must be authorised by:
  - One of the following people: CEO, CFO, MD, Director, Owner, HR Executive (not HR Manager),
  - A member of the Training Committee if your organisation has 50 or more employees,
  - The SDF.
- SDFs will be informed by a system generated e-mail when the ATR and WSP have been approved. The SDF can also check this status on the “WSP & ATR Forms” tab.
- Approval implies that the MICT Seta is happy with the data/documents submitted by the SDF/ISDF, and will be paying the Mandatory Grant back to the stakeholder organisation. The MICT Seta will also consider sponsoring the organisations on discretionary programmes.
The “Grants and Levies” Tab

- We strongly recommend that a person in the Finance Department/Division registers on the On-Line Grant System to track the Skills Development Levies that your organisation contributes to SARS, and to reconcile these levies against the Mandatory Grant that the MICT Seta pays back to your organisation.

- We frequently receive queries from SDFs because the Grant payment does not match 20% of the organisation’s levies, and as will be noted below, the Seta cannot assist with these queries. This section provides a brief overview on how to access this data in our system, followed by an example of how to go about reconciling the Mandatory Grant based on the organisation’s Levy Contributions.

To view the financial statement summary, the SDF/ISDF will select financial summary and then select the respective financial year which was chosen.

- The figure above displays what the SDF/ISDF will see. The SDF/ISDF also has a choice to either print the page or copy to a word document.
To view the Grant and Levies, select the specific summary report.

14 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.
### 15. MICT SETA Contacts

<table>
<thead>
<tr>
<th>Name</th>
<th>Designation</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karabo Mokwena</td>
<td>Administrator</td>
<td><a href="mailto:karabo.mokwena@mict.org.za">karabo.mokwena@mict.org.za</a></td>
</tr>
<tr>
<td>Sphesihle Hlongwane</td>
<td>Administrator</td>
<td><a href="mailto:sphesihle.hlongwane@mict.org.za">sphesihle.hlongwane@mict.org.za</a></td>
</tr>
<tr>
<td>Sekgana Makhoba</td>
<td>Senior Manager: Sector Skills Planning</td>
<td><a href="mailto:sekgana.makhoba@mict.org.za">sekgana.makhoba@mict.org.za</a></td>
</tr>
</tbody>
</table>