Workplace Skills Plan (WSP) and Annual Training Report (Annexure A) Guidelines on how complete forms

2019

TABLE OF CONTENTS

1. ACCESSING ORGANISATION INFORMATION

1.1 REGISTER OR REMOVE AN ORGANISATION

Steps	Action	Screenshot
1	Login into the system	
2	The Skills Development Facilitators Dashboard will open	
3	Click on *Register Organisations button*	
4	Click on the magnifying glass to select an *Organisation,* upload a *Letter of Appointment* then click *Save* to link it to your profile.	
5	To remove an Organisation, Select the *record*. The row will be highlighted when selected then click on the *Remove button*.	

1.2   EDIT SDF DETAILS

The section below outlines the process for editing the SDF's details

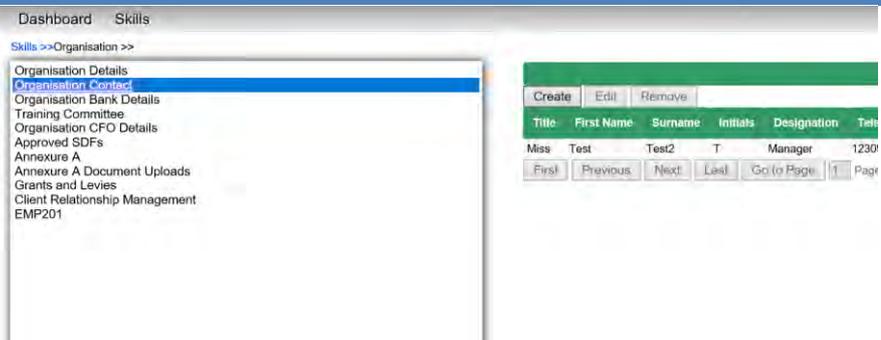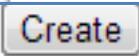| Steps	Action	Screenshot
1	On the Dashboard, click on **Your Details button**.	SDF DASHBOARD – SIMON INTERNAL TESTING 8105285262083 Financial Year Search Your Details Register Organisations
2	Click on the **Edit button.** Once done, scroll to the bottom and click **Save.**	PERSON DETAILS – SIMON INTERNAL TESTING 8105285262083 Edit ID No — 8105285262083 Alternate ID Type — Birth Certificate Number Title — Mr First Name — Simon Middle Name — Internal Surname — Testing Initials — SI Date of Birth — 28/05/1981 Gender — Male Equity — Black: African Disability Status — None Home Language — seTswana Nationality — South Africa
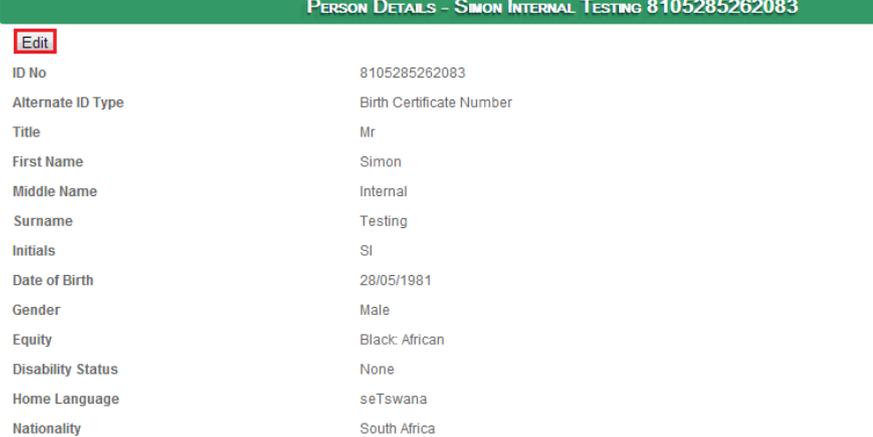
1.3   ACCESSING THE ORGANISATION DETAILS

Steps	Action	Screenshot
1	From the Dashboard, select the *Organisation*. The row will be highlighted when selected. Click on the **Action** button to open the **Organisation's** profile.	Legal Name	SDL Number	Access Status	Grant Status	Grant Due Date Aphia Industries	X123456790	Approved	Approved	30/06/2013 Action
2	If the organisation does not appear on the Dashboard, click on the Search button.	SDF DASHBOARD – SIMON INTERNAL TESTING 8105285262083 Financial Year Search Your Details Register Organisations
3	Search for the **Organisation** by completing the one of the search criteria fields.	ORGANISATION Legal Name Trade Name SDL Number Search
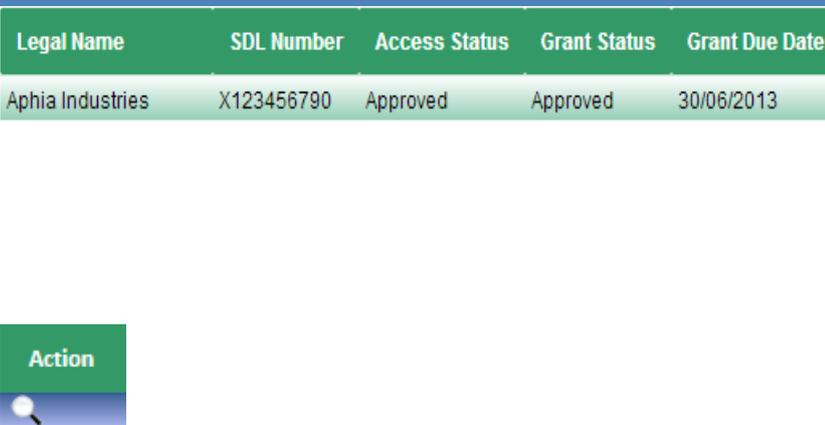
Steps	Action	Screenshot
4	Confirm the SETA data is correct If there is any information to be updated, click on the *Edit button*, then click *Save* to effect the changes. Please remember to Confirm details before continuing with WSP capturing	 **Postal Urban Rural** Urban **Postal Province** Gauteng **Confirm Organisation Details** ☑

NOTE: Please note that the information on the right is the information that we receive from the Department of Higher Education to upload onto the system. This information cannot be updated. If you need to update the information of the organisation you can do it on the left side of the screen which is the SETA DATA. **Please ensure your organisation details are correct.**

2. ORGANISATIONAL CONTACT DETAILS

The section below outlines the process for adding/editing the organisation's contact person's details

Steps	Action	Screenshot
1	Click **on** <u>Organisation</u> *Contact* from the *Organisation Menu*	
2	Click on the *Create button*	

Steps	Action	Screenshot
3	Capture the Contact's details and click the *Save* button. Contact details should be of anyone involved in WSP capturing besides SDF. Please note the **Cell Phone, Telephone** and **Fax Number** may only contain ten (10) digits. **Email address** should also contain an @ sign for it to save successfully. Should **Employee Representative** be chosen on the **Employer/ Employee Representative** dropdown option, the **Union Name** will be a required field to complete	CREATE ORGANISATION CONTACT Title [▼] First Name [ ] Surname [ ] Initials [ ] Designation [ ] Telephone Number [ ] Cell Phone Number [ ] Fax Number [ ] E Mail [ ] Postal Code [ ] Postal Address Line 1 [ ] Postal Address Line 2 [ ] Postal Address City [ ] Postal Province [Eastern Cape ▼] Postal Urban Rural [Rural ▼] Employer/Employee Representative [▼] Union Name [ ] [Save] [Cancel]

It is important for the SETA to have the contact details of the persons in the organisation. The reason for this is to be able to communicate with the relevant people of the organisation when the SETA wants to send out invitations to workshops or other functions.

Please ensure that the contact details are correct and confirm the details before creating the Annexure A forms.

3. ORGANISATIONAL BANKING DETAILS

The section below outlines the process for adding/editing Banking Details

Steps	Action	Screenshot
1	Click on *Organisation Banking Details* from the *Organisation Menu*	
2	Click on the **Edit button**	
3	Capture\Update the banking details then click the **Save button.** Please note that only number values will be saved for **Account Number** field. Banks options available are **Standard Bank**, **Nedbank, ABSA, FNB** and **Capitec**	
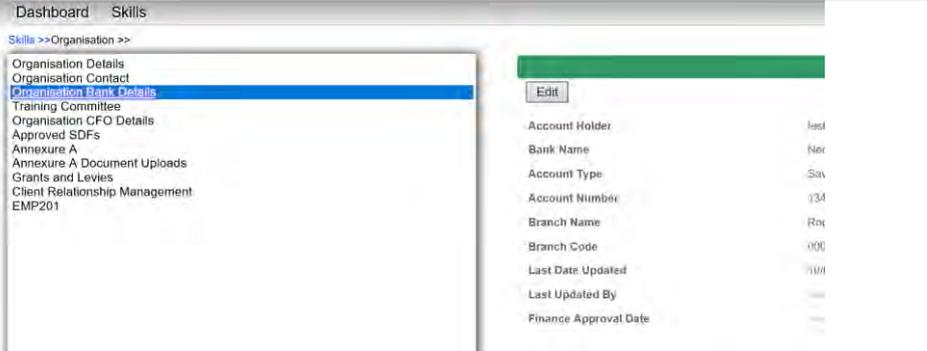
4. ORGANISATION CFO DETAILS

The section below outlines the process for adding/editing CFOs Details

Steps	Action	Screenshot
1	Click on *Organisation CFO, Finance Manger (Public Entities Details* from the *Organisation Menu*	
2	Click on the **Edit button**	
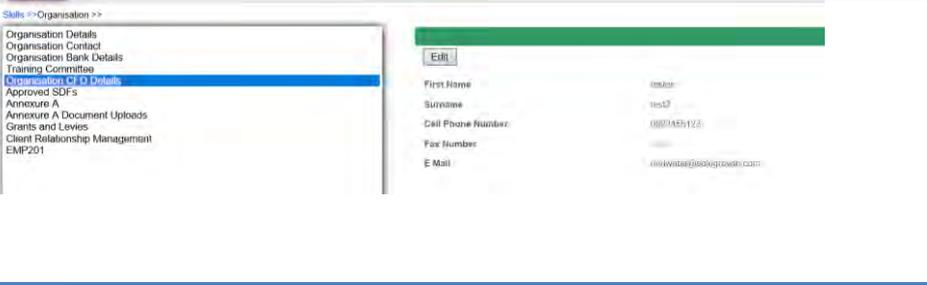
Steps	Action	Screenshot
3	Capture the CFO's contact details, then click the **Save button.** Please note the **Cell Phone** and **Fax Number** may only contain ten (10) digits. **Email address** should also contain an @ sign for it to save successfully.	Edit First Name testee Surname test2 Cell Phone Number 0823456123 Fax Number None E Mail rledwaba@solugrowth.com

5. TRAINING COMMITTEE

This section below outlines the process for adding/editing the Training Committee member's details.

This is compulsory applicable for Large entities and optional to Small entities.

Step	Action	Screenshot
1	Click on *Training Committee* from the *Organisation Menu*	Skills >>Organisation >> Organisation Details Organisation Contact Organisation Bank Details Training Committee Organisation CFO Details Approved SDFs Annexure A Annexure A Document Uploads Grants and Levies Client Relationship Management EMP201
2	Click on the *Add Training Committee button*	Add Training Committee
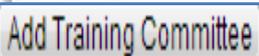
3	Capture the committee member's details then click on the *Save button*. Please note the **Cell Phone, Telephone** and **Fax Number** may only contain ten (10) digits. **Email address** should also contain an @ sign for it to save successfully. Should **Employee Representative** be chosen on the **Employer/ Employee Representative** dropdown option, the **Union Name** will be a required field to complete	
4	To update the details, click on the record and it will be highlighted. Click on the *Update* icon to open the record.	

6. CREATING NEW WSP FORMS 2019/2020

The section below outlines the process for creating new forms for the financial year

Steps	Action	Screenshot
1	Select the current *financial year* from the combo box. The page will refresh and the create button will become active. Please note the only Primary SDF can create new WSP form.	
2	Click on the *Create button*	
3	Once the number of employees has been confirmed, the window on the right will appear. Click on *View* to see the forms.	

- Users can only create the current financial year's forms and not previous years.
- Forms can only be created if all fields on the organisation information and contact details tab have been completed and confirmed to be correct

7. HOW TO COMPLETE ANNEXURE A

The Annexure A section comprises of 13 forms for all organisations. These are:

Please note the OFO code version 2017 is being used for all forms.

7.1   Form F1: Expenditure of training

The section below outlines the process for capturing the expenditure of training

Steps	Action	Screenshot
1	Click on **Form F1: (Select)**	
2	Complete the values and press save once completed	
3	Complete the details required and click **Save.**	
4	Once the record is saved, click on the back to WSP /ATR forms	

7.2   Form F3: Number of beneficiaries trained

The section below outlines the process for capturing number of beneficiaries trained

Steps	Action	Screenshot
1	Click on **Form F3: Number of beneficiaries trained** from the **Annexure A Forms Menu**	
2	Click on the **SELECT button**	
3	Complete the details required and click **Add.** **Please read note in red for key information on form**	
4	Once the record is saved, one has the option to **Edit or Remove it.**	
5	Once the record is saved, click on the back to WSP /ATR forms	
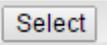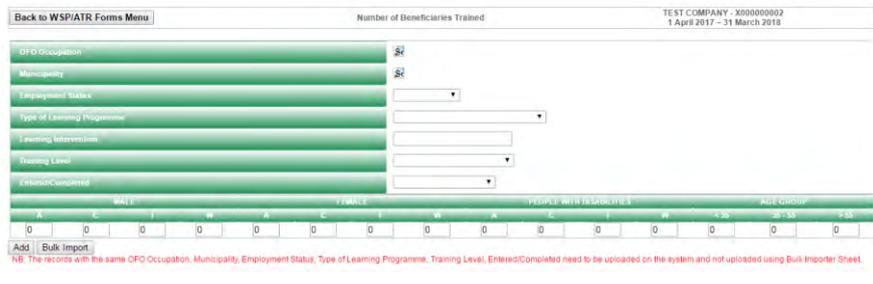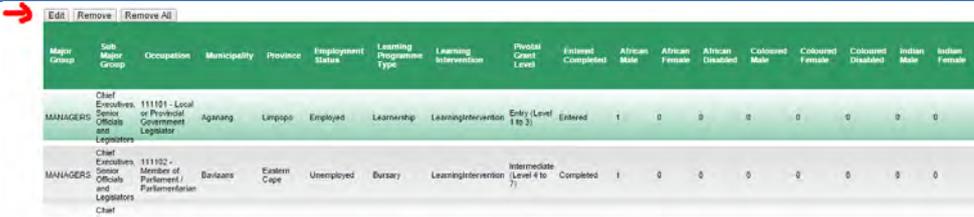
7.3   Form F8: Variance Report

The section below shows the variance report

Steps	Action	Screenshot
1	Click on *Form F8: Variance Form* from the *Annexure A Menu*	
2	The variances are viewable here. Should there be a variance between the Planned and Trained you are required to complete the reason. Click on the line to highlight it and then click the edit button	
3	Complete the details required and click *Update.*	
4	Once the record is saved, the information will be displayed as per screenshot*.*	
5	Once the record is saved, click on the back to WSP /ATR forms	

Steps	Action	Screenshot

7.4   Form F9: Hard to Fill Vacancies Progress Report

The section below outlines the progress of hard to fill vacancies from previous WSP

Steps	Action	Screenshot
1	Click on *Form F9:* from the *Annexure A Menu*	
	Form F9 populates data from Previous WSP **Form D**. If there are any comments, highlight the line at the bottom and click on **Edit**.	
	If you did not Plan in the previous WSP applications, screenshot on the right shows the display of Form F9, as it is pulling data from Previous WSP Form D, therefore in this case there is no data.	
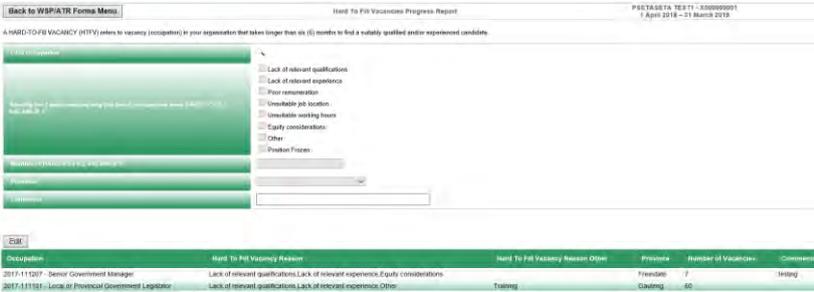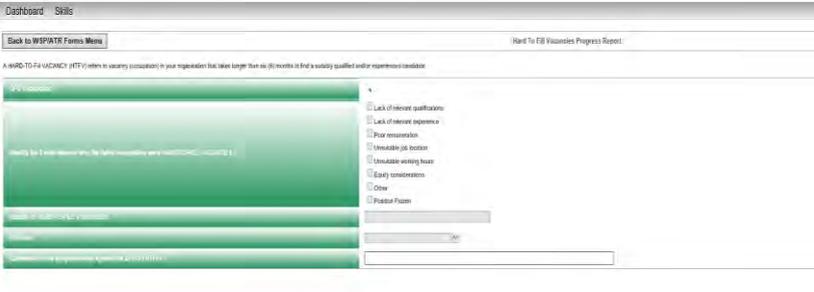
7.5 Form F11: PIVOTAL Training Report

The section below outlines the process for capturing the PIVOTAL training report.

Steps	Action	Screenshot
1	Click on *Form F11: Pivotal Training Report* from the *Annexure A Forms Menu*	
2	Click on the *select button* to open the form.	
3	Complete the details required and click *Add.*	
4	Once the record is saved, one has the option to *Edit or Remove it* by highlighting the row	
5	Once the record is saved, click on the back to WSP /ATR forms	

7.6　WSP FORM A: Administrative details

The section below outlines the process for updating the admin details.

Steps	Action	Screenshot
1	Click on **WSP Form A** from the **Annexure A Forms Menu**	
2	Click on the **Select button**	
3	Please note that the administrative detail is auto populated from various source information from Organisation Details. Only action required is to confirm if all information is correct by clicking the tick box as shown, click Save once done.	Note: Please check the checkbox below before proceeding to the next form. ☑ I declare that the information submitted is correct and accurate to the best of my knowledge. Proceed to the next form Save
4	Once the record is saved, click on the back to WSP /ATR forms	Back to WSP/ATR Forms Menu

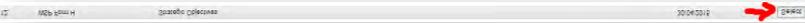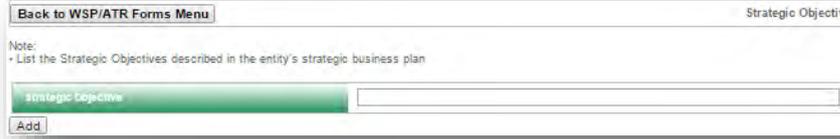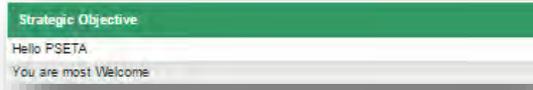## 7.7   WSP Form B: Training Budget

The section below outlines the process for capturing the training budget

Steps	Action	Screenshot
1	Click on *WSP Form B: Training Budget from* the *Annexure A Forms Menu.*	
2	Click on the *Select* button	
3	Complete the details required and click *Save.*	
4	Once the record is saved, click on the back to WSP /ATR forms	

7.8   WSP Form C: Employment Summary

The section below outlines the process for capturing the employment summary

Steps	Action	Screenshot
1	Click on **WSP Form C: Employment Summary)** **from** the **Annexure A Forms Menu**	
2	Click on the **Select button**	
3	Complete the details required and click **Update.**	
4	Once the record is saved, one has the option to **Edit or Remove it** after highlighting the row	
5	A new feature has been added. This allows SDFs to download previous years Employment Summary in Excel Format. SDFs can edit records were changes have been actioned, and re upload unto the system	

Steps	Action	Screenshot
6	Once the record is saved, click on the back to WSP /ATR forms	Back to WSP/ATR Forms Menu

7.9   WSP Form D: Hard to Fill Vacancies

The section below outlines the process Hard to fill vacancies

Steps	Action	Screenshot
1	Click on **WSP Form D** from the **Annexure A Forms Menu**	
2	Click on a **Select**	
3	Complete the details required and click **Add.**	
4	Once the details are added the line can be highlighted and information can be edited or removed.	
5	Once the record is saved, click on the back to WSP /ATR forms	

7.10   WSP Form E: Planned beneficiaries of training

The section below outlines the process for capturing planned beneficiaries of training.

Steps	Action	Screenshot
1	Click on *WSP Form E3: Planned beneficiaries of training (employed)* from the *Annexure A Forms Menu*	
2	Click on the *Select button*	
3	Complete the details required and click *Save.*	
4	Once the record is saved, one has the option to *Edit or Remove it.*	
5	Once the record is saved, click on the back to WSP /ATR forms	

7.11   WSP Form E2: Organisations Skills Gap

The section below outlines the process of capturing Organisation skills gap

Steps	Action	Screenshot
1	Click on *WSP Form E2: Organisation Skills Gap* from the *Annexure A Forms Menu*	
2	Click on the *Select button*	
3	List the top most common Skills Gaps and identify reasons as per major occupation and click *Save.*	
4	Once the record is saved, click on the back to WSP /ATR forms	

7.12 WSP Form G1: Planned PIVOTAL Beneficiaries of Training

The section below outlines the process for capturing PIVOTAL planned beneficiaries of training.

Steps	Action	Screenshot
1	Click on **WSP Form G1: PIVOTAL Planned beneficiaries of training (employed)** from the **Annexure A Forms Menu**	
2	Click on the **Select button**	
3	Complete the details required and click **Add.**	
4	Once the record is saved, one has the option to **Edit or Remove it.**	
5	Once the record is saved, click on the back to WSP /ATR forms	

7.13 WSP Form H: Strategic Objectives

The section below outlines the process of capturing the strategic objectives

Steps	Action	Screenshot
1	Click on *Form H: Strategic Objectives* from the *Annexure A Forms Menu*	
2	Click on the *Select button*	
3	Complete the details required and click *Add.*	
4	Once the record is saved will appear as such*.*	
5	Once the record is saved, click on the back to WSP /ATR forms	

7.14 WSP Form I: Strategic Training Priorities derived from the Strategic Objectives

The section below outlines the process capturing the strategic training priorities derived from the strategic objectives

Steps	Action	Screenshot
1	Click on *Form I: Strategic training priorities derived from the strategic objectives* from the *Annexure A Forms Menu*	
2	Click on the *Select button*	
3	Complete the details required and click *Add.*	
4	Once the record is saved will appear as such*.*	
5	Once the record is saved, click on the back to WSP /ATR forms	

7.15   Downloading Authorisation Page

Steps	Action	Screenshot
1	Select the WSP year for which the Authorisation Page to be generated for.	
2	Click on Print Authorisation Page	
3	The Authorisation Page will open on new window. Click on Create Word. This will download the Authorisation Page in Word format for detail capturing on page	

7.16 Submitting the Annexure A Forms

This is process is for submitting your WSP/ATR to PSETA

Steps	Action	Screenshot
1	Select the year and click on view	
2	Click on the *Submit*	
3	After Clicking **SUBMIT.** Note the Grant Status will change from created to *Submitted*. Only Primary SDF can submit WSP forms	
4	Rules	Rules will ensure that the submit button will not be enabled if all forms are not completed

make sure the required documents are uploaded these are:

- *Signed authorisation page*

8. PRINT REPORT

The section below outlines the process of printing the Annexure A report.

Steps	Action	Screenshot
1	Click on **Annexure A forms** from the **Organisation Menu**	
2	Select the current **financial year** from the combo box. And select what to print. The page will refresh then click on the print button.	
3	Once clicked the following will display	

Steps	Action	Screenshot
4	Scroll to the bottom of the page and click on the *Download to PDF button*.	
5	Once clicked the following will appear	

9. DOCUMENT UPLOAD

The section below outlines the process of uploading supporting documents

Steps	Action	Screenshot
1	Click on *Annexure A Document Uploads* from the *Organisation Menu*	
2	Select the current *Document Type* from the combo box then click on New Document Button.	
3	Select the Financial Year from the combo box, type a small description in the comments section and click on choose file. Click on the *Upload button* to save.	