



# BANKSETA

## Mandatory Grant Training Manual (WSS / WSP & ATR) 2021





## Foreword

Dear Stakeholder

As part of the WSP submission for your organisation, you need to report on employees by means of their Identity Numbers, especially on the WSS forms. BANKSETA understands the importance of ensuring that personal information (i.e. Identity Documents as well as information relate to disability) is kept in a confidential manner.


For the purposes of the collation of the information for the Sector Skills Plan, BANKSETA confirms that the information gets consolidated and only high-level data goes to the Department of Higher Education and Training (DHET).

**PoPI Act Definition:** In simple terms, the purpose of the PoPI Act is to ensure that all South African institutions conduct themselves in a responsible manner when collecting, processing, storing and sharing another entity's personal information by holding them accountable should they abuse or compromise your personal information in any way. The PoPI legislation basically considers your personal information to be "precious goods" and therefore aims to bestow upon you, as the owner of your personal information, certain rights of protection and the ability to exercise control over:

- when and how you choose to share your information (requires your consent)
- the type and extent of information you choose to share (must be collected for valid reasons)
- transparency and accountability on how your data will be used (limited to the purpose) and notification if/when the data is compromised
- providing you with access to your own information as well as the right to have your data removed and/or destroyed should you so wish
- who has access to your information, i.e. there must be adequate measures and controls in place to track access and prevent unauthorised people, even within the same company, from accessing your information
- how and where your information is stored (there must be adequate measures and controls in place to safeguard your information to protect it from theft, or being compromised)
- the integrity and continued accuracy of your information (i.e. your information must be captured correctly and once collected, the institution is responsible to maintain it)

**Examples of "personal information" for an individual could include:**

- Identity and/or passport number
- Date of birth and age
- Phone number/s (including mobile phone number)
- Email address/es
- Physical address
- Gender, Race and Ethnic origin
- Employment history and salary information
- Financial information
- Education information
- Medical history



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It must however be noted that some personal information, on its own, does not necessarily allow a third party to confirm or infer someone's identity to the extent that this information can be used/abused for other purposes. The combination of someone's name and phone number and/or email address for example is a lot more significant than just a name or phone number on its own. As such the Act defines a "unique identifier" to be data that "uniquely identifies that data subject in relation to that responsible party".

We have to accept that we now live in an information age and along with this progress comes the responsibility for each person to take care of and protect their own information.

It is important to note though that this right to protection of "personal information" is not just applicable to a natural person (i.e. an individual) but any legal entity, including companies and also communities or other legally recognised organisations. All of these entities are considered to be "data subjects" and afforded the same right to protection of their information. So this means that while you as a consumer now have more rights and protection, you and your company/organisation are considered "responsible parties" and have the same obligation to protect other parties personal information. As a company this would include protecting information about your employees, suppliers, vendors, service providers, business partners, etc.

<https://www.workpool.co/featured/popi>

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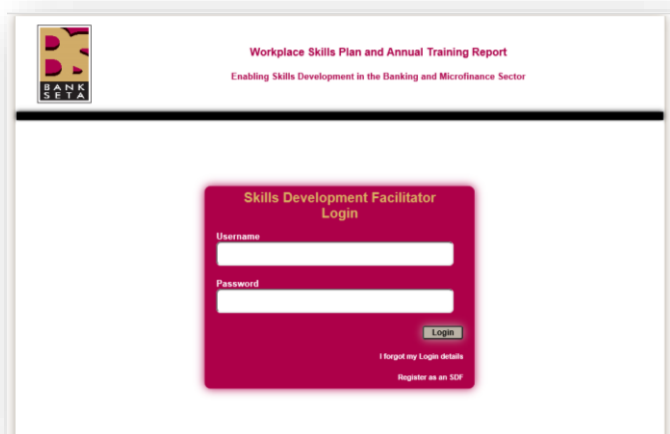
## 1. INTRODUCTION / OVERVIEW

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

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

For the SDF of your organisation to complete the WSP / ATR report please Login using the following address: [www.banksetamis.org.za](http://www.banksetamis.org.za)

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



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

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

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

## 2. REGISTRATION AS A SKILLS DEVELOPMENT FACILITATOR

### 2.1 PERSONAL DETAILS

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

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

Above is the registration form where the SDF will start by completing his / her Personal Details. On the left of the form is a list of menu items of all the sections that will have to be completed:

- Personal Details
- Contact Details
- Other Details
- Account Details

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

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

## 2.2 CONTACT DETAILS

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

**Skills Development Facilitator - Registration Form**

**Personal Details** ✓ **Contact Details**  
**Other Details**  
**Account Details**

E-mail Address \* (e.g. example@example.co.za)  
[anusha@remotenet.net]

Cell number \* (e.g. 083 123 4567)  
[0729281832]

Telephone number \* (e.g. 011 123 4567)  
[0879804701]

Fax number \* (e.g. 011 123 4567)  
[0879804702]

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

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

Province \*  
[Gauteng]

Municipality \*  
[City of Tshwane Metropol...]

Copy to Postal Address

**Back** **Next** [Cancel Registration](#)

Western Cape  
Eastern Cape  
Northern Cape  
Free State  
Kwazulu/Natal  
North West  
**Gauteng**  
Mpumalanga  
Limpopo  
City of Tshwane Metropol...

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

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

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

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

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

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

## 2.3 OTHER DETAILS

**Workplace Skills Plan and Annual Training Report**

Enabling Skills Development in the Banking and Microfinance Sector

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**Skill Development Facilitator - Registration Form**

**Personal Details** ✓      **Other Details**

Contact Details ✓      High School attended \*

Other Details     

Account Details     

☒ I have selected my last school attended.

☐ Unable to find the last school attended; last school attended was in South Africa.  
☐ Unable to find the last school attended; last school attended was not in South Africa.

Highest Education \*  
Senior Certificate

Education Description

Current Occupation \*  
Project Co-ordinator

Have you completed an IDP Training Programme provided by an accredited training provider? \*

☒ Yes  
☐ No

Name of the Accredited Provider \*  
SAL

General Comments

Do you allow us to use your details in request with the FOP Act (Act. No. 4 of 2013). \*

☒ Yes  
☐ No

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

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

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

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

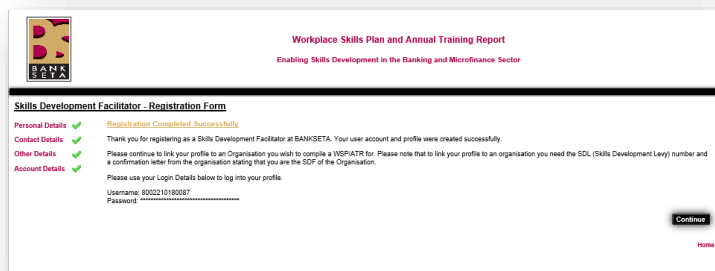
Once the details of the High School have been inserted, the SDF can proceed by completing all other information within the form. Once the SDF has completed all of the above, he has only one more step to complete his registration process.

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

Proceed by clicking on **NEXT**.



## 2.4 ACCOUNT DETAILS



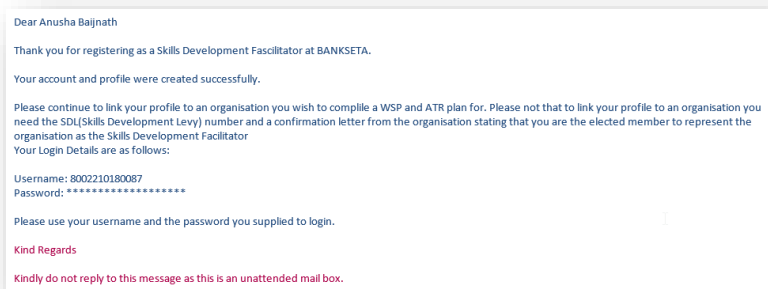
The screenshot shows the 'Skills Development Facilitator - Registration Form' interface. The header includes the BANK SETA logo and the text 'Workplace Skills Plan and Annual Training Report' and 'Enabling Skills Development in the Banking and Microfinance Sector'. The form is divided into sections: Personal Details, Contact Details, Other Details, and Account Details. Each section has a green checkmark indicating successful completion. The 'Other Details' section contains a message: 'Thank you for registering as a Skills Development Facilitator at BANKSETA. Your user account and profile were created successfully. Please continue to link your profile to an Organisation you wish to compile a WSP/ATR for. Please note that to link your profile to an organisation you need the SDL (Skills Development Levy) number and a confirmation letter from the organisation stating that you are the SDF of the Organisation.' The 'Account Details' section shows the Username: 8002210180087 and Password: [REDACTED]. A 'Continue' button is visible at the bottom right.

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

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

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

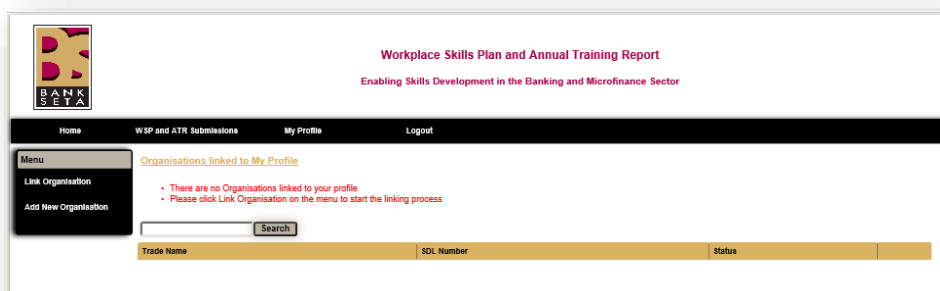
The SDF can now log into the BANKSETA WSP / ATR online module and complete the self-same form for his / her organisation.



The screenshot shows an email confirmation message. The header reads 'Dear Anusha Bajjnath'. The body text says: 'Thank you for registering as a Skills Development Facilitator at BANKSETA. Your account and profile were created successfully. Please continue to link your profile to an organisation you wish to compile a WSP and ATR plan for. Please note that to link your profile to an organisation you need the SDL(Skills Development Levy) number and a confirmation letter from the organisation stating that you are the elected member to represent the organisation as the Skills Development Facilitator. Your Login Details are as follows: Username: 8002210180087 Password: \*\*\*\*\* Please use your username and the password you supplied to login. Kind Regards Kindly do not reply to this message as this is an unattended mail box.'

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

## 3. LINK ORGANISATION TO SDF PROFILE



The screenshot shows the 'Skills Development Facilitator - Link Organisation' interface. The header includes the BANK SETA logo and the text 'Workplace Skills Plan and Annual Training Report' and 'Enabling Skills Development in the Banking and Microfinance Sector'. The form is divided into sections: Menu, Link Organisation, and Add New Organisation. The 'Link Organisation' section contains a message: 'There are no Organisations linked to your profile. Please click Link Organisation on the menu to start the linking process.' Below this is a search bar with a 'Search' button. A table with columns 'Trade Name', 'SDL Number', and 'Status' is visible at the bottom.

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

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

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

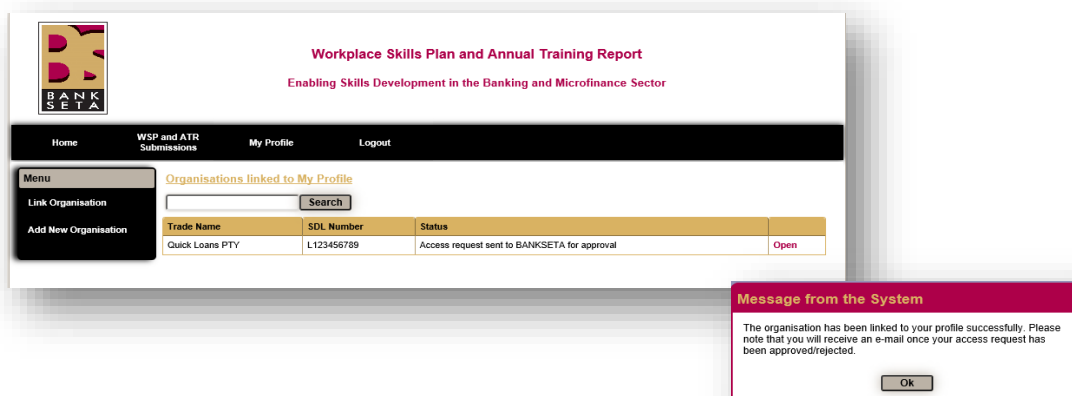
The screenshot shows the top navigation bar with 'Home', 'WSP and ATR Submissions', 'My Profile', and 'Logout'. On the left, a 'Menu' dropdown is open, with 'Link Organisation' highlighted by a red circle. Below the menu, the page title is 'Organisations linked to My Profile'. A message states: 'There are no Organisations linked to your profile. Please click Link Organisation on the menu to start the linking process.' Below this is a search bar with a 'Search' button and a table header with columns: 'Trade Name', 'SDL Number', and 'Status'.

The screenshot shows the 'Link Organisation to my Profile' form. It includes a 'Please note' section with instructions: 'Enter a valid SDL Number to link to your Profile', 'Upload a signed confirmation letter from the Organisation by an executive officer stating that you are the selected SDF for the Organisation', 'The system will only accept Word/PDF documents only', and 'If you enter a valid SDL Number and the system states that the Organisation was not found on the system, then proceed to add the Organisation onto the system.' The form fields are: 'SDL Number' (text input with value 'J123456789'), 'Company Name' (text input with value 'Quick Loans PTY'), 'Company Size' (dropdown menu with value 'Small Company (1 to 49)'), 'Company is a Subsidiary' (dropdown menu with value 'No'), 'Confirmation Letter' (file upload button with 'Browse...' text), and 'SDF Function' (dropdown menu with values 'Primary SDF' and 'Secondary SDF'). A 'Link' button is at the bottom right, and a 'Cancel' link is at the bottom.

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

The SDF can browse for the Confirmation Letter that confirms that the

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



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

Dear Anusha Baijnath

You have successfully linked the following Organisation to your profile.

Quick Loans PTY - L123456789

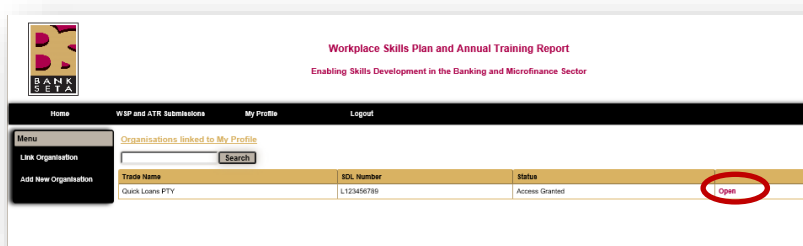
Your details have been submitted to BANKSETA who will verify your details and furthermore confirm that you are the appointed SDF to complete a WSP/ATR for the Organisation.

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

Kind Regards

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

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



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

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

Transaction Date	Year	Mandatory	Levy portion paid to SETA	Mandatory Grant Criteria Met

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

Above the SDF can now view the following information:

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

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

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

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

#### 4. UPDATING / CAPTURING A NEW ORGANISATION

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

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

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

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

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

#### 4.1 ORGANISATION DETAILS

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

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

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

**Subsidiary: a company controlled by a holding company.**

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

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

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

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

## 4.2 ORGANISATION CONTACT

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

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

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

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

The SDF is to note that all compulsory fields are marked with a red \* and has to be completed. Once all of the above information has been completed, click on **UPDATE** to save the information.

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

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

### 4.3 BANK DETAILS

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

Home WSP and ATR Submissions My Profile Logout

Menu

Home

Organisation Details

Organisation Contact

Bank Details

Financial Director

Training Committee Details

Secondary SDF

Subsidary Organisation(s)

Exit Organisation

Bank Details

Bank Name Alpha Bank Limited

Account Number 1234567890

Account Type Business Account

Branch Code 432005

Account Holder Name Quick Loans PTY

Proof of Bank details

Click here to view document

Browse... Submit File

Change

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

Home WSP and ATR Submissions My Profile Logout

Menu

Home

Organisation Details

Organisation Contact

Bank Details

Financial Director

Training Committee Details

Secondary SDF

Subsidary Organisation(s)

Exit Organisation

Bank Details change

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

Bank Name

Account Number

Account Type

Branch Code

Account Holder Name

Cancel change

Update

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

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

## 4.4 CFO / FINANCIAL DIRECTOR

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

The screenshot shows the 'Financial Director' form in the WSP and ATR system. The form is titled 'Financial Director' and includes fields for 'SCL Number' (L123456789), 'Trade Name' (Quick Loans PTY), 'Title' (CEO), 'First Name' (James), 'Last Name' (Dean), 'E-mail Address' (james@quickloans.net), 'Cell Number' (0740439169), and 'Phone Number' (0879804701). An 'Update' button is located at the bottom right of the form. The left sidebar contains a menu with options: Home, Organisation Details, Organisation Contact, Bank Details, Financial Director, Training Committee Details, Secondary SDF, Subsidiary Organisation(s), and Exit Organisation.

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

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

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

## 4.5 TRAINING COMMITTEE

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

The screenshot shows the 'Training Committee' page in the WSP and ATR system. The page title is 'List of all the Training Committee Members'. There is an 'Add' button at the top left. Below the button is a table with columns: Title, First Name, Last Name, E-mail Address, Cell Number, Phone Number, Designation, Edit, and Del. The table contains three rows of data.

Title	First Name	Last Name	E-mail Address	Cell Number	Phone Number	Designation	Edit	Del
Mrs	Maiton	Peters	mp@quickloans.net	0720301632	0720301632	HR Executive: Employer Representative	Edit	Del
Mr	James	Dean	james@quickloans.net	0740439169	0740439169	EE Consultant: Employer Representative	Edit	Del
Mr	Dean	Henry	dean@quickloans.net	0799162318	0799162318	HR Executive: Employer Representative	Edit	Del
Miss	Mercia	April	mercia@quickloans.net	0740439169	0740439169	Training Manager: Employer Representative	Edit	Del

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

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

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



Home WSP and ATR Submissions My Profile Logout

Menu SDI Number L123456789 Trade Name Quick Loans PTY

**Add Training Committee Member**

Organisation Details  
Title

Organisation Contact  
First Name Last Name

Bank Details  
E-mail Address Phone Number Cell Number

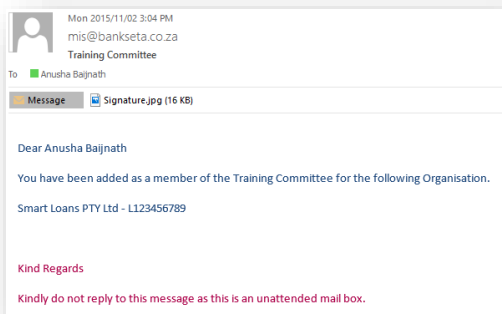
Financial Director  
Designation

Training Committee Details  
Secondary SDF

Subsidiary Organisation(s)  
Exit Organisation

Save Cancel

Below is a sample email.



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

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

## 4.6 SECONDARY SDF's

Home WSP and ATR Submissions My Profile Logout

Menu SDI Number L123456789 Trade Name Quick Loans PTY

**Secondary SDF**

List of all the Secondary SDFs linked to this Organisation

Title	First Name	Last Name	E-mail Address	Status
-------	------------	-----------	----------------	--------

Organisation Details  
Organisation Contact  
Bank Details  
Financial Director  
Training Committee Details  
Secondary SDF  
Subsidiary Organisation(s)  
Exit Organisation

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

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

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

## 4.7 SUBSIDIARY ORGANISATIONS

Home WSP and ATR Submissions My Profile Logout

Menu

Home

Organisation Details

Organisation Contact

Bank Details

Financial Director

Training Committee Details

Secondary SDF

Subsidiary Organisation(s)

Exit Organisation

SDL Number L123456789 Trade Name Quick Loans PTY

Subsidiary Organisation(s)

Trade Name	SDL Number	SIC Code	Company Registration Number
------------	------------	----------	-----------------------------

Above the SDF will find the Subsidiary Organisation page.

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

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

## 5. CREATING THE PLAN

Home WSP and ATR Submissions My Profile Logout

Trade Name

SDL Number

Search

Organisations linked to My Profile

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

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

Home WSP and ATR Submissions My Profile Logout

Trade Name

Quick Loans PTY

SDL Number

L123456789

List of all WSP/ATR linked to your Organisation

Active Period: 2018

Closing Date: 30 April 2018

The WSP and ATR Plan for Period 2018 has not been created as yet. Please click >> [Here](#) << to create the Plan.

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

Close

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

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

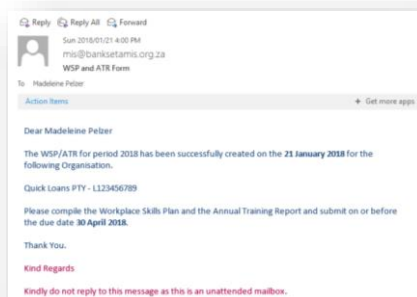
Above the SDF can view the instruction in red included in the page above, to proceed click on **HERE**, the system will create all forms that are included with the plan that has to be completed.

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



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

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

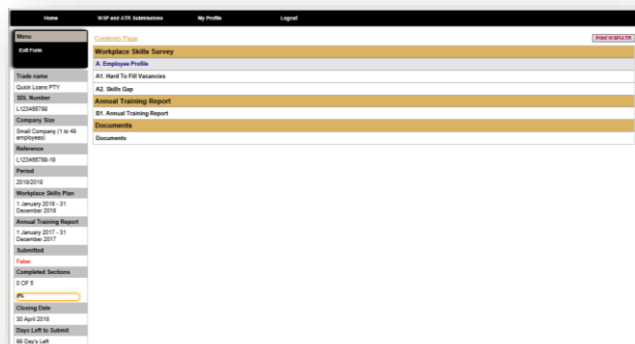


The Organisations Name and the SDL Number is included within the email.

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

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

### 6.1 SMALL ORGANISATIONS (1 – 49)



Section	Details
Trade Name	A1. Hard To Fill Vacancies
Levy Number	A2. Skills Gap
System Generated Reference Number	A3. Annual Training Report
Period	B1. Annual Training Report
WSP Date Period	Documents
ATR Date Period	
Submitted	
Completed Forms	
Closing Dates	
Days left to submit	

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

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

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

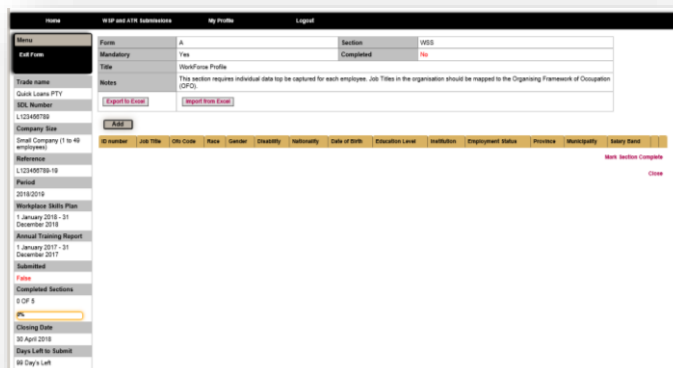
All of the above gives the SDF a clear indication of always knowing which organisation he / she is working with, in which period he / she is in, with the closing dates and the number of days left to submit.

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

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

## 6.1.1 EMPLOYEE PROFILE (FORM A)

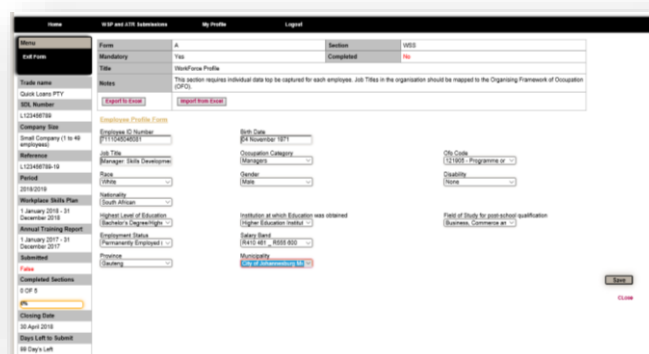
This section requires individual data to be captured for each employee. Job Titles in the organisation should be mapped to the Organising Framework of Occupation (OFO).



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

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

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



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

ID number	Job Title	City Code	Race	Gender	Disability	Nationality	Date of Birth	Education Level	Institution	Employment Status	Province	Municipality	Salary Band	Add	Delete
142334475852	Credit Manager	121100 - Credit Manager	Indian	Male	None	South African	30 Aug 1974	Bachelor's Degree/Highest Diploma/Tech Diploma	Higher Education Institution	Permanently Employed (Full-Time)	Western Cape	City of Cape Town Metropolitan Municipality	R410 400 R520 500	Add	Delete
711104275981	Director	242201 - Accounting Officer	Coloured	Female	Sight (even with glasses)	South African	04 Nov 1971	Doctorate / PhD	Higher Education Institution	Permanently Employed (Full-Time)	Western Cape	City of Cape Town Metropolitan Municipality	R1100 R1300 R1500 R1700	Add	Delete

## 6.1.2 HARD TO FILL VACANCIES (FORM A1)

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

ID number	Job Title	City Code	Race	Gender	Disability	Nationality	Date of Birth	Education Level	Institution	Employment Status	Province	Municipality	Salary Band	Add	Delete
142334475852	Credit Manager	121100 - Credit Manager	Indian	Male	None	South African	30 Aug 1974	Bachelor's Degree/Highest Diploma/Tech Diploma	Higher Education Institution	Permanently Employed (Full-Time)	Western Cape	City of Cape Town Metropolitan Municipality	R410 400 R520 500	Add	Delete
711104275981	Director	242201 - Accounting Officer	Coloured	Female	Sight (even with glasses)	South African	04 Nov 1971	Doctorate / PhD	Higher Education Institution	Permanently Employed (Full-Time)	Western Cape	City of Cape Town Metropolitan Municipality	R1100 R1300 R1500 R1700	Add	Delete

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

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

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

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

Form	A1	Section	WSS
Mandatory	Yes	Completed	No
Title	Hard To Fill Vacancies		
Notes	A Hard-To-Fill Vacancy (HTFV) refers to an occupation in your organisation that takes longer than 6 months to find a suitably experienced and qualified candidate.		
<a href="#">Export to Excel</a> <a href="#">Import from Excel</a>			
<a href="#">Add</a>			
Occupation	Province	Reason	
122102 - Sales Manager	Western Cape	Lack of relevant experience	<a href="#">Edit</a> <a href="#">Del</a>
			<a href="#">Mark Section Complete</a> <a href="#">Close</a>

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

### 6.1.3 SKILLS GAPS (FORM A2)

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

Form	A2	Section	WSS
Mandatory	Yes	Completed	No
Title	Skills Gap		
Notes	A Skills Gap refers to skills that an employee does not have to carry out job tasks competently. It is also referred to as "top-up" skills.		
<a href="#">Export to Excel</a> <a href="#">Import from Excel</a>			
<a href="#">Add</a>			
Major Occupation	Reason		
Major Common Skills Gap			<a href="#">Mark Section Complete</a> <a href="#">Close</a>

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

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

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

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

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

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

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

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

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



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

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

## 6.2.1 A3 – NATIONAL PROVINCIAL PROFILE

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

Trade name	Western Cape	Northern Cape	Eastern Cape	Free State	Gauteng	Mpumalanga	Limpopo	North West	KwaZulu-Natal	Grand Total
ASSA	10	10	10	10	10	10	10	10	10	30

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

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

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

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

The screenshot shows the 'WSP and ATR Submissions' form. The 'Update' button is visible at the bottom right of the form.

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

The screenshot shows the 'WSP and ATR Submissions' form with the 'Mark Section Complete' button visible at the bottom right of the form.

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

SDF can now proceed to the next form.

## 6.2.2 A4 – CURRENT EMPLOYMENT PROFILE

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

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

- Occupational Category
- OFO Code
- Province
- Municipality

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

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

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

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

### 6.2.3 A6 – PLANNED BENEFICIARIES FOR TRAINING

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

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

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

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

- Occupation Category
- OFO Code
- Province
- Municipality

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

- Males
- Females
- Disabled
- Age Groups.

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

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

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

The SDF will clearly be able to see the WSP / ATR status from the indication bar on the left side of the screen.

Above is a sample of a screenshots of the search function of the pivotal programmes.

The SDF can make changes to the list at any time before submission. **Mark Section Complete** and proceed with A7.

## 6.2.4 A7 – PLANNED EXTERNAL BENEFICIARIES FOR TRAINING

Section A7 deals with external beneficiaries planned for training detailing OFO codes, race and gender breakdown, disability, provincial, municipality as well as PIVOTAL details (e.g. Learnerships). Proceed by clicking on **ADD** to complete the data entry for Form A7.

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

- Occupation Category
- OFO Code
- Province
- Municipality

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

- Males
- Females
- Disabled
- Age Groups.

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

The screenshot shows the A7 form interface. It includes a sidebar with navigation tabs like 'Home', 'A7', 'A8', 'A9', 'A10', 'A11', 'A12', 'A13', 'A14', 'A15', 'A16', 'A17', 'A18', 'A19', 'A20', 'A21', 'A22', 'A23', 'A24', 'A25', 'A26', 'A27', 'A28', 'A29', 'A30', 'A31', 'A32', 'A33', 'A34', 'A35', 'A36', 'A37', 'A38', 'A39', 'A40', 'A41', 'A42', 'A43', 'A44', 'A45', 'A46', 'A47', 'A48', 'A49', 'A50', 'A51', 'A52', 'A53', 'A54', 'A55', 'A56', 'A57', 'A58', 'A59', 'A60', 'A61', 'A62', 'A63', 'A64', 'A65', 'A66', 'A67', 'A68', 'A69', 'A70', 'A71', 'A72', 'A73', 'A74', 'A75', 'A76', 'A77', 'A78', 'A79', 'A80', 'A81', 'A82', 'A83', 'A84', 'A85', 'A86', 'A87', 'A88', 'A89', 'A90', 'A91', 'A92', 'A93', 'A94', 'A95', 'A96', 'A97', 'A98', 'A99', 'A100'. The main content area shows a form with fields for 'Form', 'Mandatory', 'Status', 'Notes', 'Export to Excel', 'Import from Excel', 'Print', 'Cancel', 'Save', 'Delete', 'Add', 'Edit', 'View', 'Search', 'Filter', 'Sort', 'Page', 'Total', 'First', 'Previous', 'Next', 'Last'. The 'Form' field is set to 'A7'. The 'Mandatory' field is set to 'No'. The 'Status' field is set to 'Completed'. The 'Notes' field contains the text 'Planned Adult Education and Training'. The 'Export to Excel' and 'Import from Excel' buttons are visible. The 'Print', 'Cancel', 'Save', 'Delete', 'Add', 'Edit', 'View', 'Search', 'Filter', 'Sort', 'Page', 'Total', 'First', 'Previous', 'Next', 'Last' buttons are also visible. The 'Form' field is set to 'A7'. The 'Mandatory' field is set to 'No'. The 'Status' field is set to 'Completed'. The 'Notes' field contains the text 'Planned Adult Education and Training'. The 'Export to Excel' and 'Import from Excel' buttons are visible. The 'Print', 'Cancel', 'Save', 'Delete', 'Add', 'Edit', 'View', 'Search', 'Filter', 'Sort', 'Page', 'Total', 'First', 'Previous', 'Next', 'Last' buttons are also visible.

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

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

## 6.2.5 A8 – PLANNED ADULT EDUCATION AND TRAINING

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

Proceed by clicking on **ADD**.

The screenshot shows the A8 form interface. It includes a sidebar with navigation tabs like 'Home', 'A7', 'A8', 'A9', 'A10', 'A11', 'A12', 'A13', 'A14', 'A15', 'A16', 'A17', 'A18', 'A19', 'A20', 'A21', 'A22', 'A23', 'A24', 'A25', 'A26', 'A27', 'A28', 'A29', 'A30', 'A31', 'A32', 'A33', 'A34', 'A35', 'A36', 'A37', 'A38', 'A39', 'A40', 'A41', 'A42', 'A43', 'A44', 'A45', 'A46', 'A47', 'A48', 'A49', 'A50', 'A51', 'A52', 'A53', 'A54', 'A55', 'A56', 'A57', 'A58', 'A59', 'A60', 'A61', 'A62', 'A63', 'A64', 'A65', 'A66', 'A67', 'A68', 'A69', 'A70', 'A71', 'A72', 'A73', 'A74', 'A75', 'A76', 'A77', 'A78', 'A79', 'A80', 'A81', 'A82', 'A83', 'A84', 'A85', 'A86', 'A87', 'A88', 'A89', 'A90', 'A91', 'A92', 'A93', 'A94', 'A95', 'A96', 'A97', 'A98', 'A99', 'A100'. The main content area shows a form with fields for 'Form', 'Mandatory', 'Status', 'Notes', 'Export to Excel', 'Import from Excel', 'Print', 'Cancel', 'Save', 'Delete', 'Add', 'Edit', 'View', 'Search', 'Filter', 'Sort', 'Page', 'Total', 'First', 'Previous', 'Next', 'Last'. The 'Form' field is set to 'A8'. The 'Mandatory' field is set to 'No'. The 'Status' field is set to 'Completed'. The 'Notes' field contains the text 'Planned Adult Education and Training'. The 'Export to Excel' and 'Import from Excel' buttons are visible. The 'Print', 'Cancel', 'Save', 'Delete', 'Add', 'Edit', 'View', 'Search', 'Filter', 'Sort', 'Page', 'Total', 'First', 'Previous', 'Next', 'Last' buttons are also visible.

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

- Occupation Category
- OFO Code
- Province
- Municipality

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

- Males
- Females
- Disabled
- Age Groups.

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

The screenshot shows the 'WSP and ATR Submission' form. The 'Form' dropdown is set to 'A8'. The 'Section' dropdown is set to 'WSP'. The 'Mandatory' checkbox is checked. The 'Title' is 'Planned Adult Education and Training'. The 'Notes' field contains 'Planned AET training interventions detailing OFO codes, race and gender breakdown, disability, provincial, municipality as well as PIVOTAL details'. The 'Export to Excel' and 'Import from Excel' buttons are visible. The 'Company Size' dropdown is set to 'Medium Company (50 to 149 employees)'. The 'Period' is set to '2018/2019'. The 'Workplace Skills Plan' is set to '1 January 2018 - 31 December 2018'. The 'Annual Training Report' is set to '1 January 2017 - 31 December 2017'. The 'Submitted' checkbox is checked. The 'Completed Sections' section shows '4 OF 12' completed. The 'Closing Date' is '30 April 2018'. The 'Days Left to Submit' is '88 Days Left'.

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

## 6.2.6 A9 – HIGHEST EDUCATIONAL PROFILE

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

The screenshot shows the 'WSP and ATR Submission' form. The 'Form' dropdown is set to 'A9'. The 'Section' dropdown is set to 'WSP'. The 'Mandatory' checkbox is checked. The 'Title' is 'Highest Educational Profile'. The 'Notes' field contains 'Highest qualification of each employee within the organisation inclusive of race, gender and disability status'. The 'Export to Excel' and 'Import from Excel' buttons are visible. The 'Company Size' dropdown is set to 'Medium Company (50 to 149 employees)'. The 'Period' is set to '2018/2019'. The 'Workplace Skills Plan' is set to '1 January 2018 - 31 December 2018'. The 'Annual Training Report' is set to '1 January 2017 - 31 December 2017'. The 'Submitted' checkbox is checked. The 'Completed Sections' section shows '5 OF 12' completed. The 'Closing Date' is '30 April 2018'. The 'Days Left to Submit' is '87 Days Left'.

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

- Province



\_\_\_\_\_

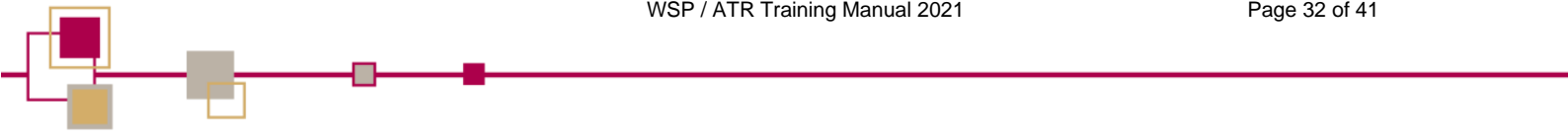
Below the SDF can view a sample of a completed A9 Listing.

<b>Name</b>																	
<b>End Date</b>																	
<b>First Name</b>	AJ	<b>Session</b>	NSP														
<b>Surname</b>	Tay	<b>Completed</b>	Yes														
<b>Title</b>	highest Educational Profile																
<b>Notes</b>	highest qualification of each employee within the organisation inclusive of race, gender and disability status																
<a href="#">Export to Excel</a> <a href="#">Import from Excel</a>																	
<b>ID#</b>	LBR704321																
<b>Company Size</b>	<input type="button" value="Add"/>																
<b>Previous</b>	NSF Level																
	M	P	D	G	M	P	D	G	M	P	D	G	M	P	D	G	Total
Counting	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Mark section completed																	
<b>Period</b>	2016/2019																
<b>Workplaces / Skills Plan</b>	7 January 2016 - 31 December 2016																
<b>Annual Training Report</b>	7 January 2017 - 31 December 2017																
<b>Submitted</b>	False																
<b>Completed Sections</b>	8 OF 12																
<b>Next</b>	<input type="button" value="Add"/>																
<b>Closing Date</b>	30 April 2019																
<b>Days Left to Submit</b>	27 Day's Left																

### 6.2.7 A10 – DEVELOPMENT AND CONSULTATIVE PROCESS

[illegible]

### 6.2.8 A11 – PIVOTAL PLAN REPORT



Menu

Exit form

Trade name

Smart Loans PTY Ltd

SDL number

L123456789

Reference

L123456789-17

Period

2016/2017

Workplace Skills Plan

1 May 2016 - 30 April 2017

Annual Training Report

1 May 2015 - 30 April 2016

Submitted

False

Completed Forms

7 OF 14

50%

Closing Date

30 April 2016

Day's Left to Submit

170 Day's Left

Contents Page

WorkPlace Skills Plan

✓ A3. National Provincial Profile

✓ A4. Current Employment Profile

✓ A5. Annual Skills Priorities

✓ A6. Planned beneficiaries of education and training priorities

✓ A7. Planned external beneficiaries for training

✓ A8. Planned adult education and training

✓ A9. Highest education

A11. Pivotal Plan

Annual Training Report

B2. Annual Skills Priorities

B3. Training Beneficiaries Report

B4. Variance Report

B5. External Beneficiaries

B6. Completed Adult Education and Training

B7. Learning Programmes for the year ending

B8. Pivotal Training Report

WSP and ATR Documents

Documents

Menu	WSP and ATR Submissions	My Profile	Logout
Forms	Forms	A11	Section
Exit form	Title	Pivotal Plan Report	WSP
	Notes		
Trade name	Category	QPS Code	Completed
SDL Number	Managers	12100	Completed
Submitting SDF	Professionals	24200	Completed
Submitted	Managers	12100	Completed
Completed Forms	Professionals	24200	Completed
7 OF 14	Managers	12100	Completed
50%	Professionals	24200	Completed
Closing Date	Managers	12100	Completed
30 April 2016	Professionals	24200	Completed
Day's Left to Submit	Managers	12100	Completed
170 Day's Left	Professionals	24200	Completed

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

Status on the indication bar now shows 50% completed.

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

## 7. COMPILE AN ANNUAL TRAINING REPORT (ATR)

### 7.1 SMALL ORGANISATIONS (1 – 49)

#### 7.1.1 B1 – ANNUAL TRAINING REPORT

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

The screenshot shows the 'B1' section of the 'WSP and ATR Submissions' form. The form is titled 'Annual Training Report' and includes fields for 'Trade name', 'SDF Number', 'Company Size', 'Period', 'Workplace Skills Plan', 'Annual Training Report', 'Submitted', 'Completed Sections', 'Closing Date', and 'Days Left to Submit'. The 'Submitted' field is set to 'False'. The 'Completed Sections' field shows '4 OF 5' with a progress bar. The 'Closing Date' is '30 April 2018' and 'Days Left to Submit' is '97 Days Left'. The form also includes a 'Save' button and a 'Close' button.

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

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

#### 7.1.2 DOCUMENTS

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

The screenshot shows the 'B1' section of the 'WSP and ATR Submissions' form, specifically the 'Documents' tab. It displays a table with columns for 'Document Name', 'Document Description', 'Document Type', 'Date uploaded', 'Filename', and 'Delete Doc'. The table is currently empty. There are buttons for 'Download Authorisation Form Template', 'Click to Downloadview', and 'Click to Downloadview'. The form also includes a 'Save' button and a 'Close' button.

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

### 7.2.1 B3 – TRAINING REPORT FOR EMPLOYED

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

The screenshot shows the B3 Training Report form. The left menu includes options like 'Menu', 'Exit Form', 'Trade name', 'SDL Number', 'Company Size', 'Reference', 'Period', 'Workplace Skills Plan', 'Annual Training Report', 'Submitted', 'False', 'Completed Sections', 'Closing Date', and 'Days Left to Submit'. The main form area has fields for 'Form' (B3), 'Section' (ATR), 'Mandatory' (Yes), 'Completed' (No), 'Title' (Training Beneficiaries Report), and 'Notes' (Individuals completed training detailing OFO codes, race and gender breakdown, disability, provincial, municipality as well as PIVOTAL details). Below these fields is an 'Add' button and a table with columns for Category, OFO Code, Occupation, Province, Municipality, PIVOTAL, PIVOTAL Programme, and a grid of checkboxes for various attributes (A, M, F, D, C, I, W, O, O, <, 35-55, >). The table contains one row of data for 'Managers' with OFO Code '121103', Occupation 'Credit Manager', Province 'Western Cape', Municipality 'City of Cape Town Metropolitan Municipality', and PIVOTAL 'Yes'. The grid shows values for each attribute, and the total is 10. The bottom right of the table has a 'Mark section complete' link and a 'Close' button.

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

- Occupation Category
- OFO Code
- Province
- Municipality

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

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

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

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

- Occupation Category
- OFO Code
- Province
- Municipality

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

Proceed by clicking **MARK SECTION COMPLETED**.

## 7.2.3 B6 – COMPLETED ADULT EDUCATION AND TRAINING

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

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

The SDF is to complete the following:

- Occupation Category
- OFO Code
- Province
- Municipality

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

## 7.2.4 B7 – LEARNING PROGRAMMES FOR THE YEAR ENDING

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

On the form above complete the following:

- Skills Priority

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

Home
WSP and ATR Submissions
My Profile
Logout

Menu
Exit Form

Trade name  
ABSA  
SDL Number  
L887854321  
Company Size  
Medium Company (50 to 149 employees)  
Reference  
L887854321-19  
Period  
2018/2019  
Workplace Skills Plan  
1 January 2018 - 31 December 2018  
Annual Training Report  
1 January 2017 - 31 December 2017  
Submitted  
False  
Completed Sections  
0 OF 12  
75%  
Closing Date  
30 April 2018  
Days Left to Submit  
97 Day's Left

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

Add

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

Mark section complete
Close

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

### 7.2.5 B8 – PIVOTAL TRAINING REPORT

Home
WSP and ATR Submissions
My Profile
Logout

Menu
Exit Form

Form
B8
Section
ATR

Title
PIVOTAL Training Report

Notes

Trade name
ABSA

SDI Number
L987654321

Company Size
Medium Company (50 to 149 employees)

Reference
L987654321-19

Period
2018/2019

Workplace Skills Plan
1 January 2018 - 31 December 2018

Annual Training Report
1 January 2017 - 31 December 2017

Submitted
False

Completed Sections
10 OF 12
83%

Closing Date
30 April 2018

Days Left to Submit
97 Day's Left

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

Close

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

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

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

## 7.2.6 DOCUMENTS

The screenshot shows the 'WSP and ATR Submissions' dashboard with the 'Documents' section selected. The main content area displays a table with columns for 'Section', 'Documents', 'Form', and 'WSP and ATR Documents'. The 'Documents' column shows 'Mandatory' and 'Completed'. The 'Form' column shows 'Completed'. The 'WSP and ATR Documents' column shows 'Yes'. Below the table, there are links for 'Download Authorization Form Template', 'Click to Downloadview', and 'Click to Downloadview'. There are also buttons for 'Download', 'Resubmit File', and 'Submit File'. A 'Cancel upload' button is visible at the bottom left. The sidebar menu is the same as in the previous screenshot.

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

- Proof of Banking Details
- Consultation Letter
- Authorization Letter

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



**WSP and ATR Submission**

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

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

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

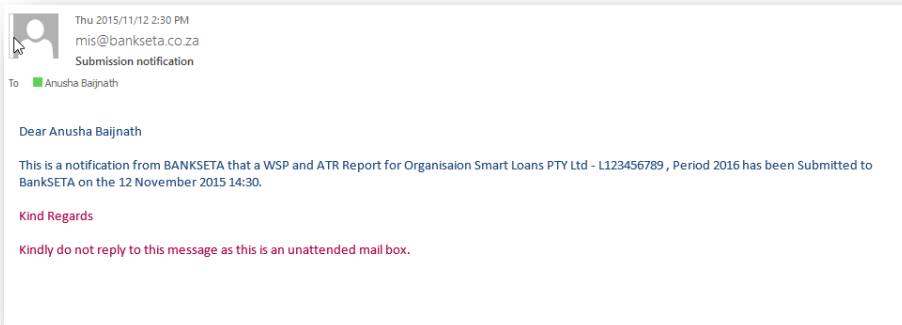
[Cancel](#)

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

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

## 8. SUBMISSION

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



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

**WSP and ATR Submission**

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

Company Name	Smart Loans PTY Ltd	SDL number	L123456789
Reference	L123456789-17	Period	2016
Proof of Banking Details	<a href="#">Click here to view</a>		
Consultation Letter	<a href="#">Click here to view</a>		
Authorization form	<a href="#">Click here to view</a>		
Date Created	11 November 2015 10:53	SDF who created the plan	Mrs Anusha

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

**Submit Plan** Cancel


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

The SDF can now view that his / her plan has been submitted, and is awaiting approval by BANKSETA. A print function has been added for the SDF, where he / she is able to print out

the complied report for his / her reference.

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

-----End of the BANKSETA online WSS / WSP / ATR.-----

Name & Surname	Designation	Signature	Date
Christine Fritz	GM: Operations		
Madeleine Pelzer	Manager: Skills Development		14/01/2021
Shaun Starr	Manager: Alternative Banking		