

FUTURE SKILLS • EMPLOYABILITY • GROWTH

# Discretionary Grants Submissions User Guide

#### **LMIS User Guide – Discretion Grants Submissions**



# **Table of Contents**

Introduction	3
Update Profile	3
Projects (DG Grants)	
Request Access/Authorization to a company	
Applying for DG	
Virtual Guide	9
Adding documents to DG and Submitting	14
Virtual Guide	15
Adding Learners to DG	17
Submit Learner for Verification	20
Add Learner Documents.	20
Add Learner Employment Status.	23
Virtual Guide	23
Submit for Verification.	24





# Introduction

## Dear Valued Stakeholder,

Welcome to iMIS! This user guide will guide you through the process of applying for discretionary grants.

- Apply for DG under Projects:
- Capture all the required information and save the funded application as an employer.
- Receive, verify and make recommendations on information submitted by employers to FP&M SETA Team.
- Add Learners to DG and submit them for verification

This user guide only covers Learner Interventions Project Coordination submission functionality. Below is the URL to access:

URL: https://lmis-uat.fpmseta.org.za/

# **Update Profile**

When a user logs in for the first time, they will be required to update their profile. To do that, they must follow the on-screen procedure.

#### **LMIS User Guide – Discretion Grants Submissions**



1. Starting with clicking "Start" button. The system will require Employee

details in this

#### order:

- a. Personal Details
- b. Contact Details
- c. Address Details
- d. Educational Details







# **Projects (DG Grants)**

This section of LMIS is for external use. Before grant application can be made by the employee, they need to be a part of a company. To be part of a company, they must request access to manage a Company's applications. If they are authorized, they will be able to manage the company details, as well as apply for grant on behalf of that company.

# Request Access/Authorization to a company

To request access, Employee must:

- 1. Click their Username field at the top right corner of their screen, A list of options will appear.
- 2. From the list, Select **"User Profile"**. Which will take the user to Profile Overview screen.
- 3. From Profile Overview screen, click "Authorized Access".

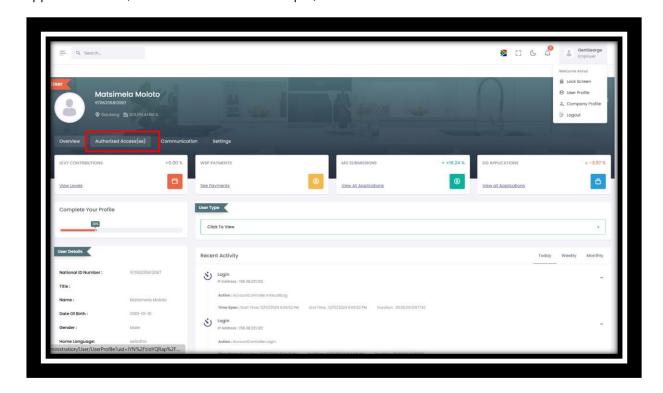
**Note:** For new users on the system, they won't be any results shown on the overview. For returning users who once requested access before. They will see all their requests here, from approved, rejected and pending requests.

- 4. Click the "Add" button and populate the modal pop up that appear. Please ensure your Application Letter is in PDF format.
- 5. After all fields have been filled and application letter uploaded, user can proceed to submit their request by clicking "Save" button.

#### LMIS User Guide - Discretion Grants Submissions



**Note:** The most important part, user should pick the correct company from "**Organization Name**" drop box. Failure to do so will result in their request being rejected. Before uploading application letter, user must make sure it is pdf/docx file.



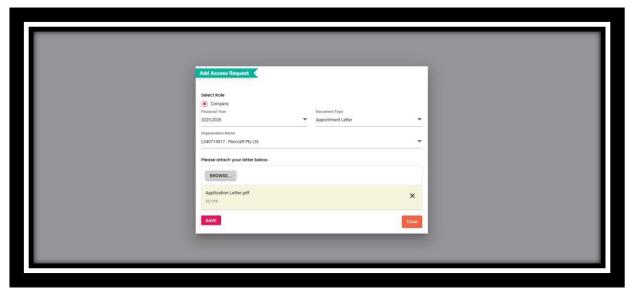
Every user is required to Add a new Access request for the company they want to apply funding for.





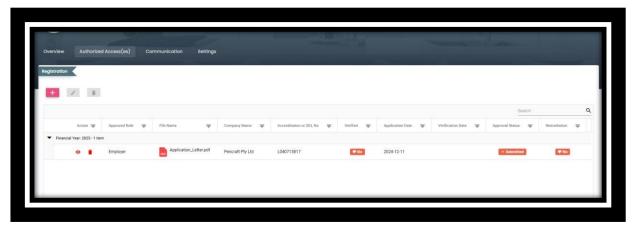


Make sure to populate the popup fields with the correct information is part of requesting for access.









**Note:** If the request went through, it should be visible under Authorized Access tab. At this point, Request status should be "**submitted**". As soon as the request is approved, we'll have access to the company profile.

# **Applying for DG**

DG Application is divided into 4 sections,

- a. Company Details
- b. Contact Details
- c. Address Information
- d. Learning Interventions Details

To apply for DG, follow these Steps below:

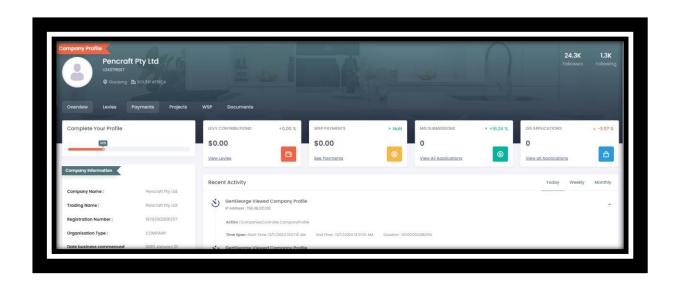
- 2. Click your "username" at the top right corner of the screen.
- 3. Select "company profile". The system will direct you to company profile.
- 4. Select "Projects" Tab and Click "Apply for Funding" button.
- 5. DG Window will open, from here click **Start** Button.



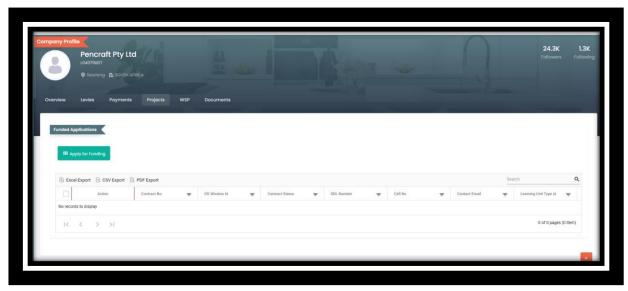


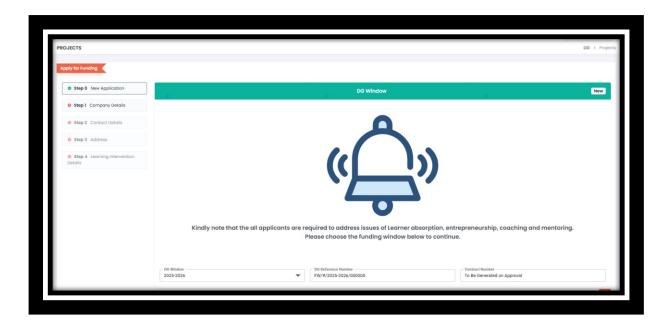
- 6. On Company details, Provide Company Details. Then Click **Go to Contacts** button.
- 7. On Contact Details, provide all required information then click **Go To Address** button.
- 8. On Address, provide all required information then click **Go To Intervention** button.
- 9. On Intervention, Provide all required information.
  - a. Learner Intervention Type is key because there are correct amounts attached.
  - b. Make sure the FP&M SETA Learning Unit is checked.
  - c. Know the Qualifications and its related LP Approved
  - d. Know which Learnership you are running as some Users capture wrong information which will impact learners at a later stage.
  - e. Indicate the number of Employed and Unemployed. f. Select the Training Provider.
- 10. To complete the application, Click Save and Load Documents button.

## Virtual Guide





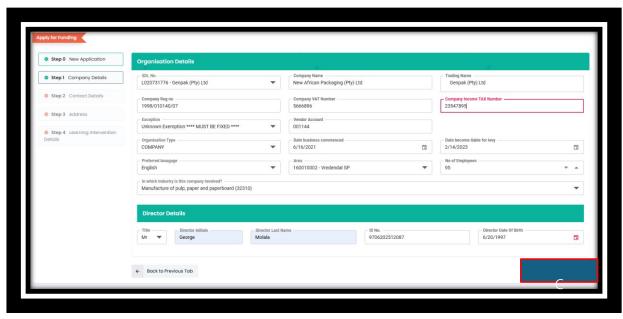






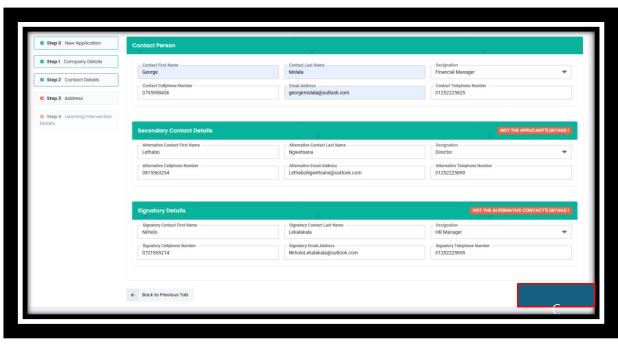
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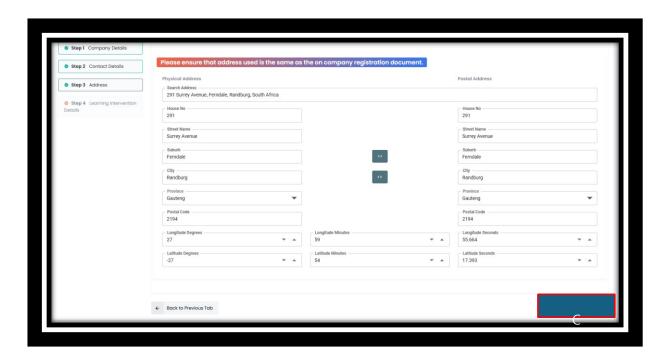






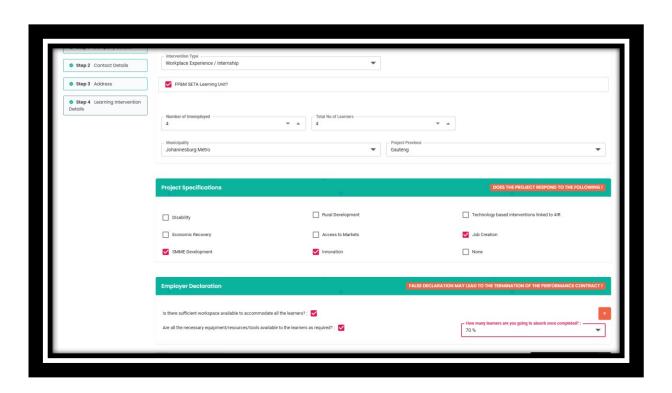
















# Adding documents to DG and Submitting

Once you have completed all the relevant information and saved your DG Application. You must submit supporting documents.

To start uploading Documents, follow these steps below:

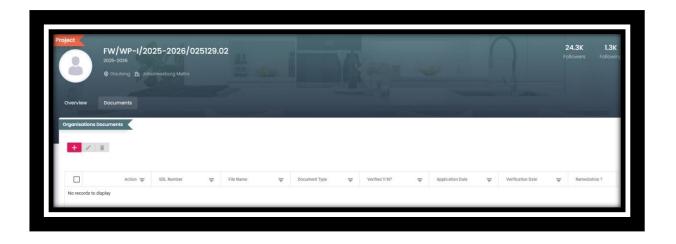
- 1. Click your "username" at the top right corner of the screen.
- 2. Select "company profile". The system will direct you to company profile.
- 3. Select "Projects" Tab and Select DG Application you created from Data Grid.
- 4. Once on Project Overview, Click **Documents** Tab.
- 5. To Add Documents, Click **Add** button right above Data Grid.
- 6. Once Modal up appear, Select Document Type from the Dropdown box and Click upload.
- 7. Select appropriate document from your machine then click **Add document** button.
- 8. Repeat Step 5-7 until you done uploading all required documents.
- 9. Once all Documents are submitted, Click **Submit Application** button.

**Note:** For the system to save your documents without any issues, ensure your documents are PDF's and less than 5mb file size.



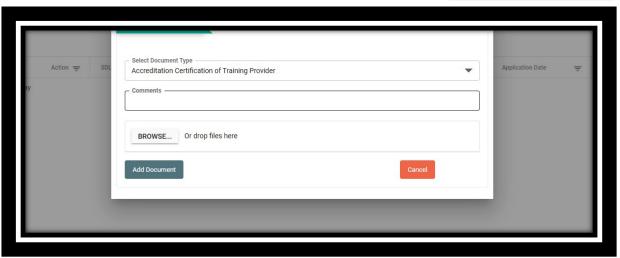
## **Virtual Guide**





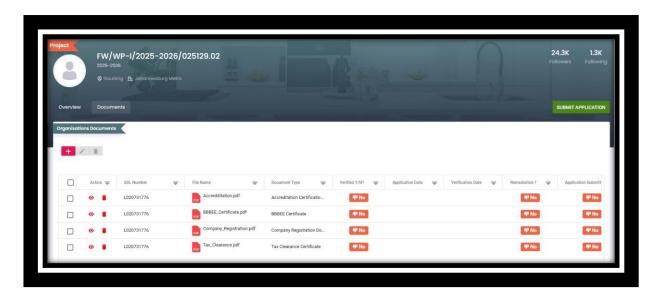






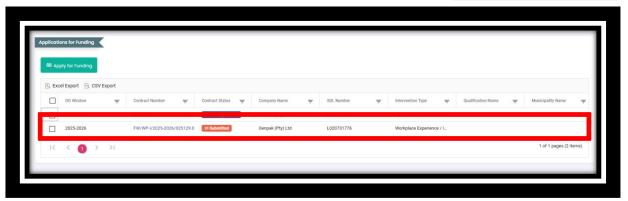
All the uploaded supporting documents will appear on the overview grid as shown below:

Once company details, intervention details and supporting documents have been captured, the application it is now ready to be submitted for verification.









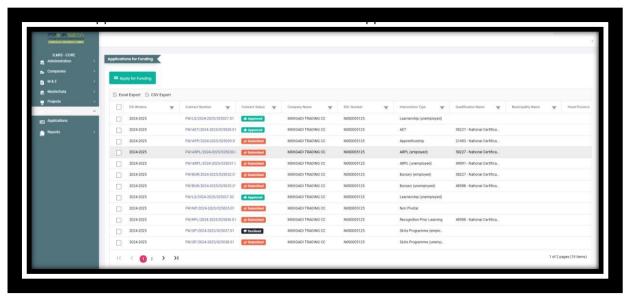
# **Adding Learners to DG**

Before we proceed to assign learners to DG, Employee must ensure their DG Application is approved. If it is not approved, they will not be able to assign any leaners.

To navigate to DG Applications Page, go to navigation Pane and Follow this directory "Projects>Seta Funding>Applications".

- 1. Select the appropriate approved DG application from the list.
- 2. Click "Learner" Tab from Project Overview.
- 3. Click "Add" button.
- 4. System will direct user to New Learner Profile Page, click "Start" button.
- 5. Capture Learner Details and Finalize the process by clicking "Save" button.



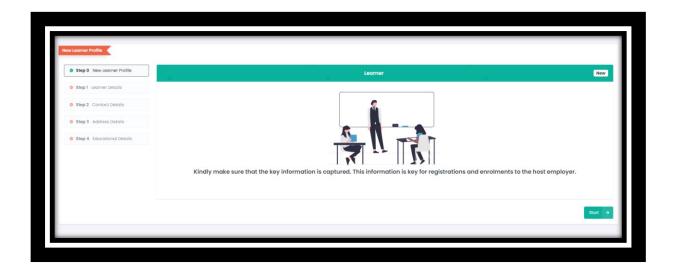


Once you are in the application, you will then navigate to Learners tab.









Confirmation that a learner is added successfully.



Once a Learner is added to DG, they will appear under "Learner" Tab on DG Overview. The last step is to submit the learner for verification. To do that, employee must select recently added learner by



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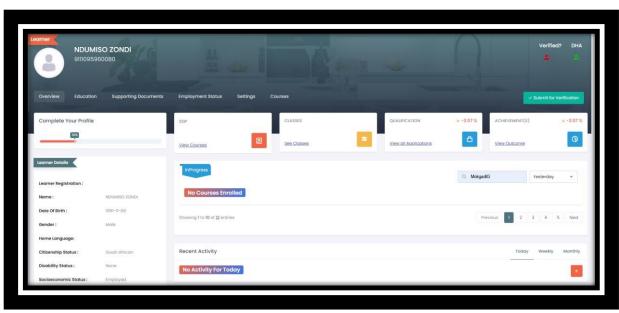
Western Cape 3rd floor, West Wing, Palm Centre, 145 Sir Lowry Road, Woodstock, Cape Town PO Box 351, Woodstock, 7915 Tel: 021-462 0057; Fax 021-462 0039

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clicking "View" button. The system will navigate Employee to Learner Profile, where they will add learner supporting documents (Certified copy of Highest Qualification, Certified copy of ID and Learner Agreement) and Learner Employment Status.

1.



## **Submit Learner for Verification**

From the learner Profile, Employee must first upload learner supporting Documents before submitting learner for verification. Failure to upload all learner documents and Employment status, system will not allow employees to submit learner for verification. To do that,

## Add Learner Documents.



#### LMIS User Guide - Discretion Grants Submissions

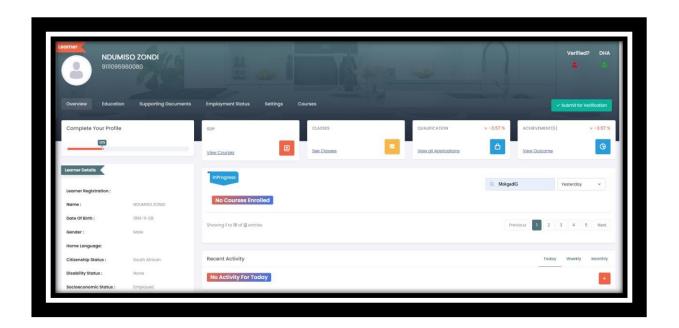


- Navigate to a recently created DG application using one of the methods explained above.
- 2. Click "Learner" Tab.
- 3. From List of learners, **Search** for the learner we just added to the system.
- 4. Select Learner, by Clicking "View" button.
- 5. From Learner Profile, click "Supporting Documents" Tab.
- 6. click "Add" button.
- 7. Populate modal popup with required information. click "**Browse**" button to load document.

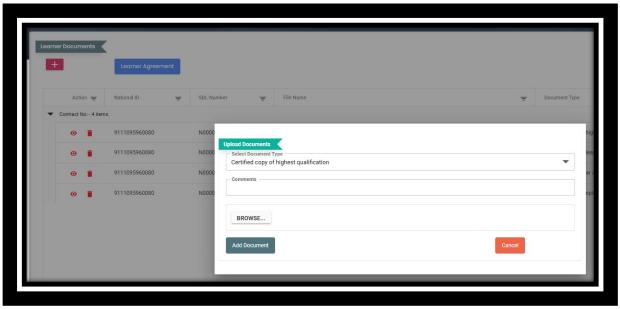
**Note:** Ensure you select the correct document type from drop box. Again, ensure your document is in PDF. Failure to do so might result in your application being Rejected.

8. Click "Add document" Button.

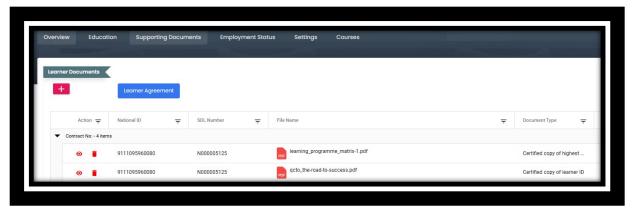
In each individual learner profile, you will then navigate to Supporting Documents.







Step 4: Confirmation that document is added.





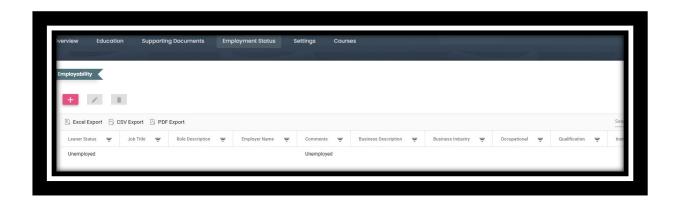


# **Add Learner Employment Status.**

To add employment status:

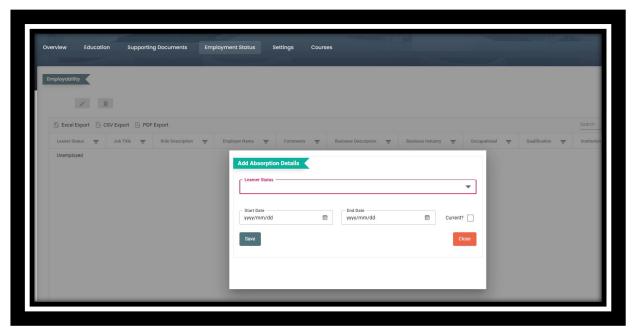
- 1. click "Employment Status" Tab.
- 2. Under the Tab, click "Add" button.
- 3. Supply required fields and click "Save" button.

## **Virtual Guide**









Once added, Employment Status will appear on the list.

## **Submit for Verification.**

Once all required information about learner is filled, the employee can proceed to submit Learner for verification by clicking "Submit for verification" button.





#### LMIS User Guide - Discretion Grants Submissions



Once you're done with adding Learners to the system. You must wait for Seta Staff to evaluate them.

Congratulations, you made it to the end of this guide. Thank You!

