Fibre Processing & Manufacturing Sector Education and Training Authority

FUTURE SKILLS • EMPLOYABILITY • GROWTH

# Mandatory Grants Submissions User Guide

# Table of Contents

# Introduction

**Dear Valued Stakeholder,**

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

- Registration of Skills Development Facilitator on LMIS.
- Submission of Work Skills Plan (WSP) and Annual Training Reports (ATR) on LMIS by SDFs on behalf of entities.
- Approval of WSP and ATR by FP&M SETA on LMIS, for Entities to comply and qualify for Mandatory Grants.
- Reporting on skills shortages and facilitating processes to provide grants that address these issues.
- Planning to address skills shortage by being proactive, this is through accurate research and reporting.
- Maintaining a relationship between Employer, Learners, SDP and FP&M SETA throughout the entire Intervention process. Continuous communication between all parties to be facilitated via LMIS.
- View reliable information about the learner.
- Reporting on Chambers and its sub-sectors.

This section demonstrates and explains how a Skills Development Facilitator (SDF) can gain access to LMIS and start capturing WSP and ATR.

## Role of Skills Development Facilitator (SDF) on the system.

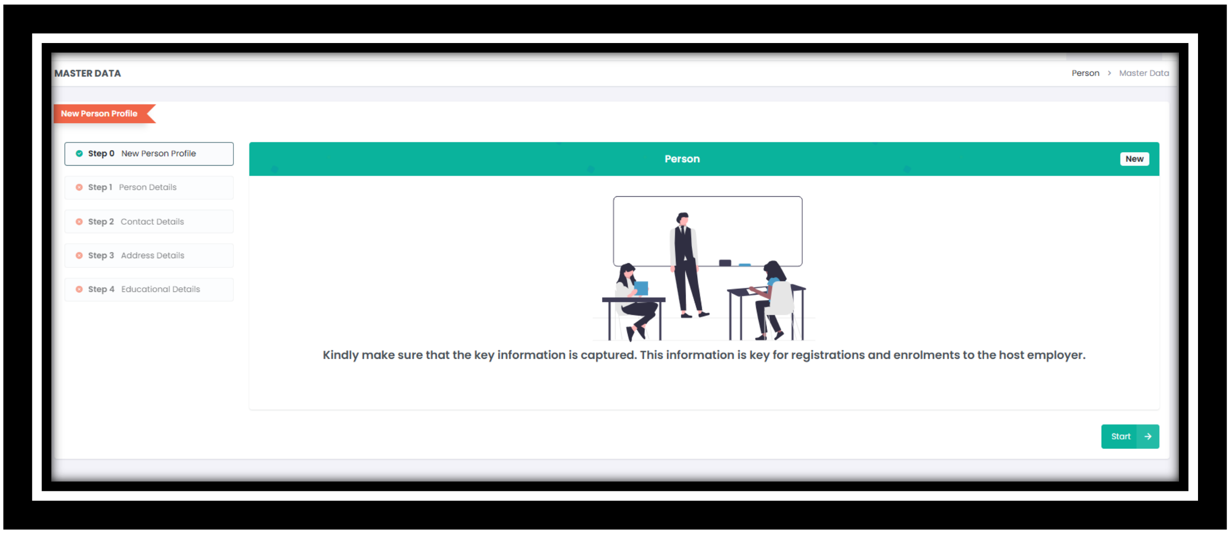
A user needs to Register on the system as SDF before gaining access to the following key features:

- Register a Company on LMIS and supply all key information for WSP and ATR submission.
- Upload Supporting Documentation.
- Capture WSP and ATR, using one of the following methods: Manually or Copy Form Last Year then submit for Review and Approval.

## Register an SDF

This section demonstrates and explains how a Skills Development Facilitator (SDF) can gain access to LMIS and start capturing WSP and ATR.

Log in Screen for first time users.




## 1. Capture SDF Profile

By default, as a first-time user on the system. You're required to update your profile by providing vital information about yourself. This part is divided into 4 sections.

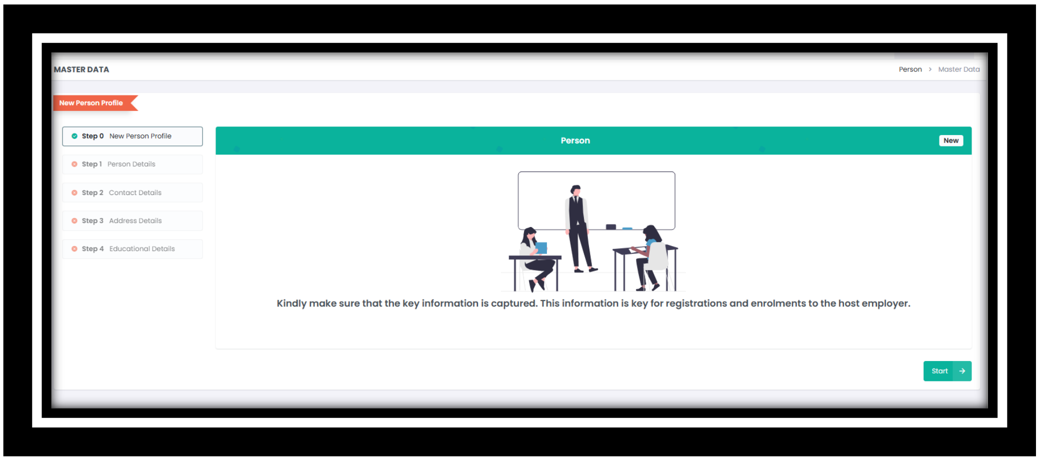
1. Personal details
2. Contact Details
3. Address Details
4. Educational Details

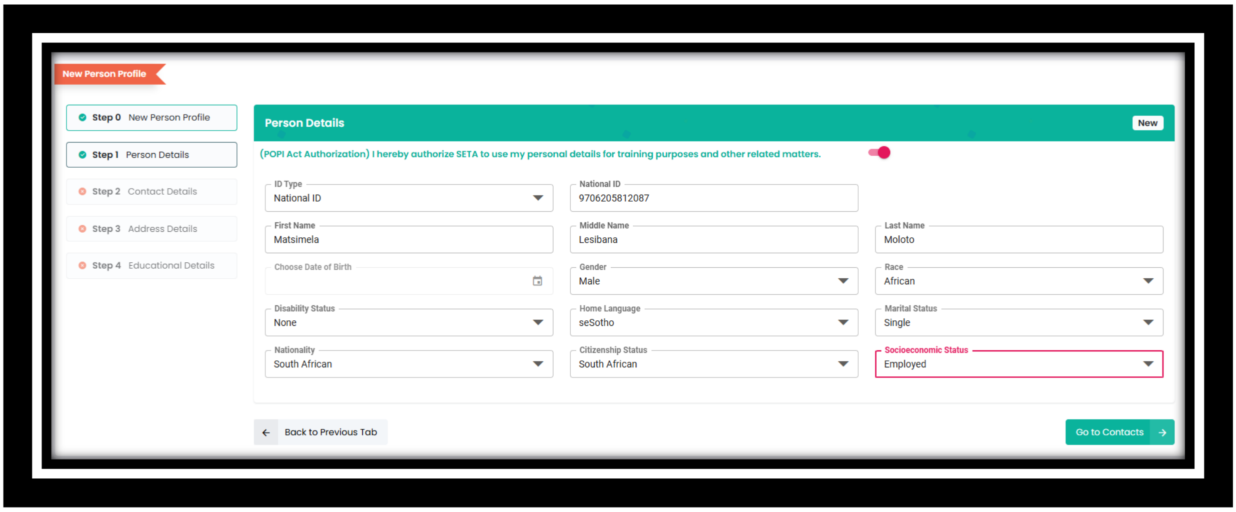
To start the process, follow the steps below.

1. On Personal details screen, fill the required information. Ensure you select the right ID Type.
2. Once all fields are filled, move to the next section by clicking **Go to contact's** button.
3. Fill all required fields and click **Go to Address** button.
4. Fill all required fields and click **Go to Education** button.
5. Once you're done with **Education details**. Click **Save** button.

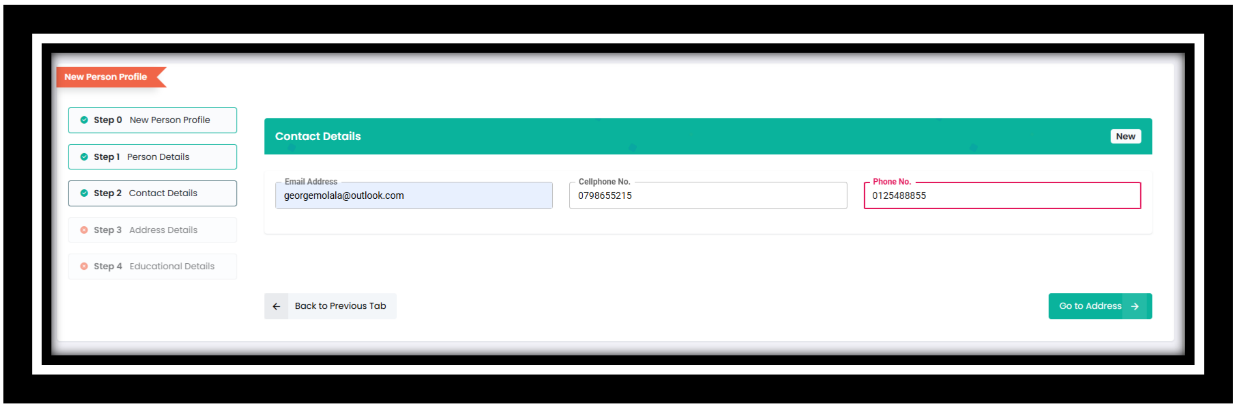
### 1.4.1 Virtual Guide

Step 1

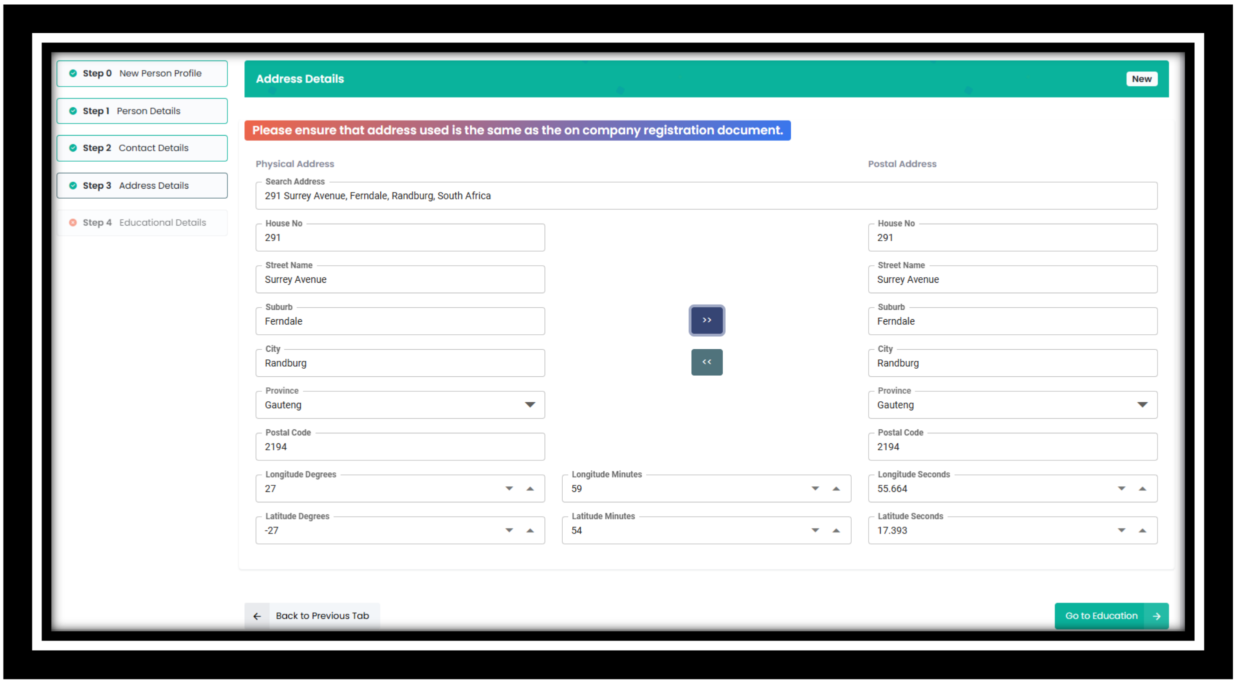



New Person Profile
Step 0 New Person Profile
Step 1 Person Details
Step 2 Contact Details
Step 3 Address Details
Step 4 Educational Details
Person Details
New
(POPI Act Authorization) I hereby authorize SETA to use my personal details for training purposes and other related matters.
ID Type
National ID
National ID
9706205812087
First Name
Matsimela
Middle Name
Lesibana
Last Name
Moloto
Choose Date of Birth
Gender
Male
Race
African
Disability Status
None
Home Language
seSotho
Marital Status
Single
Nationality
South African
Citizenship Status
South African
Socioeconomic Status
Employed
Back to Previous Tab
Go to Contacts

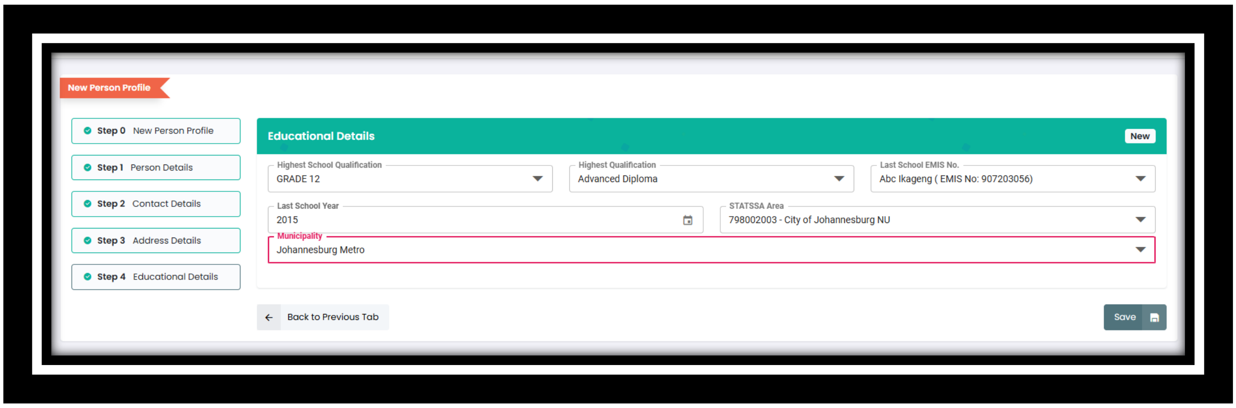
Step 3.


New Person Profile
Step 0 New Person Profile
Step 1 Person Details
Step 2 Contact Details
Step 3 Address Details
Step 4 Educational Details
Contact Details
New
Email Address
georgemolala@outlook.com
Cellphone No.
0798655215
Phone No.
0125488855
Back to Previous Tab
Go to Address

Step 4




Step 5.




## 2. Request Organization/Company Access

Before SDF can perform any tasks related to maintaining organization's applications. They must first be authorized to manage that organization. First step in getting authorized is to submit request for access application. To do that, user must:

1. Click Username field at the top right corner of the 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”** Tab**.**
4. Right above Data Grid, Click **Add** button.
5. Modal up will appear, Fill the form supplying required data. Starting with checking **SDF checkbox,** Select appropriate year from **financial dropdown box**.
6. Leave **Document type** default option (Application Letter).
7. Select appropriate company/organization you want to manage, from **Organization Name** Dropdown box.
8. Click **browse** button and select application letter from your machine. Ensure your document is PDF before uploading.
9. After all fields have been filled and application letter uploaded, you can proceed to submit the request by clicking **“Save”** button.

**Note:** The most important part, you should pick the correct company from **“Organization Name”** drop box. Failure to do so will result in your request being rejected. Before uploading application letter, make sure it is pdf file.

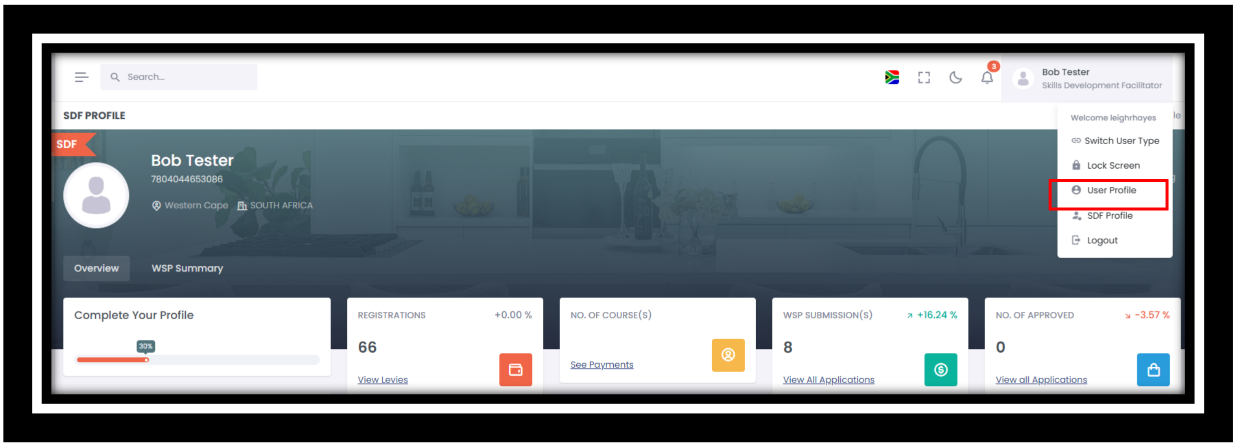
Once your Request is submitted, you’ll get an email notification.

## 2.1 Virtual Guide

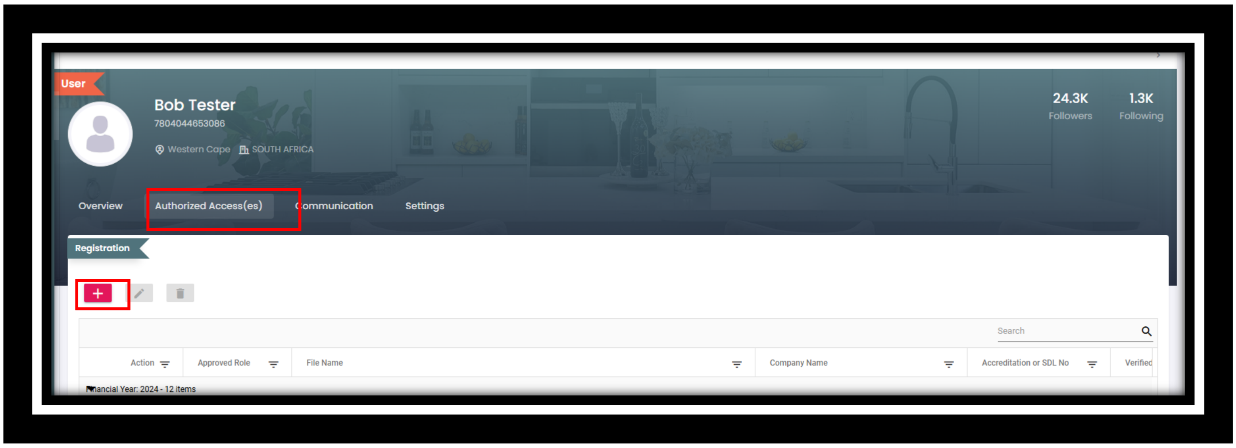
Step 1


Search...
Bob Tester
Skills Development Facilitator
SDF PROFILE
SDF › SDF Profile
SDF
Bob Tester
7804044653086
Western Cape
SOUTH AFRICA
24.3K
Followers
1.3K
Following

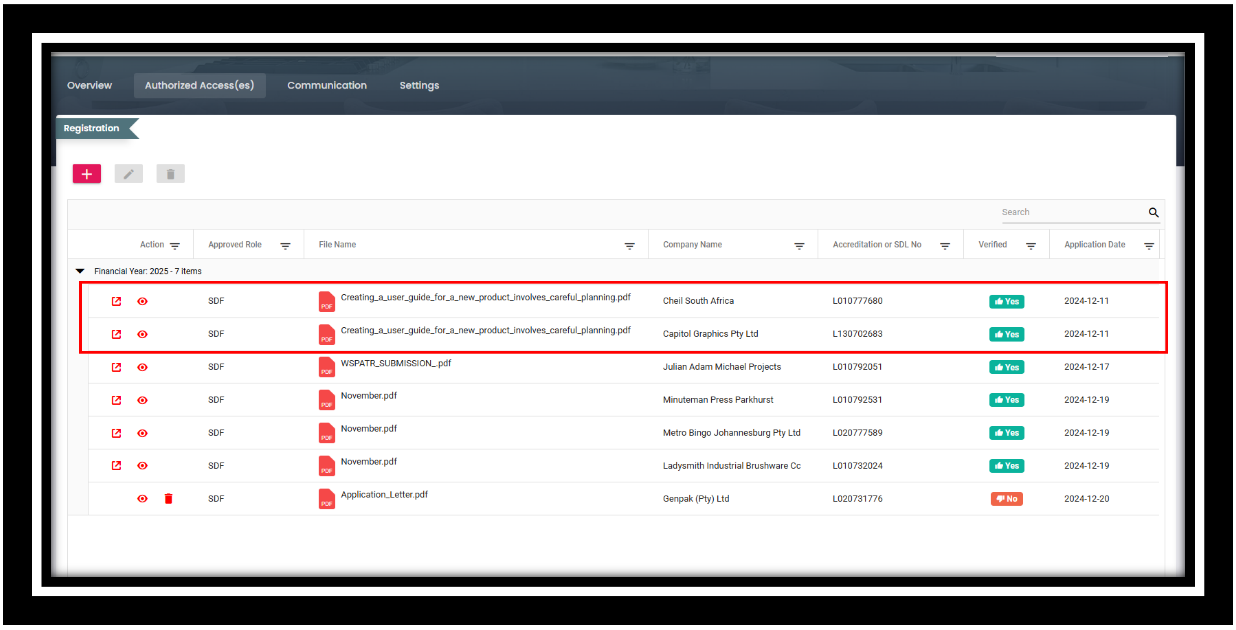
Step 2.


Search...
Bob Tester
Skills Development Facilitator
SDF PROFILE
Welcome leighrhayes
Switch User Type
Lock Screen
User Profile
SDF Profile
Logout
SDF
Bob Tester
7804044653086
Western Cape
SOUTH AFRICA
Overview
WSP Summary
Complete Your Profile
30%
REGISTRATIONS
+0.00 %
66
View Levies
NO. OF COURSE(S)
See Payments
WSP SUBMISSION(S)
+16.24 %
8
View All Applications
NO. OF APPROVED
-3.57 %
0
View all Applications

Step 3.


User
Bob Tester
7804044653086
Western Cape
SOUTH AFRICA
24.3K
Followers
1.3K
Following
Overview
Authorized Access(es)
Communication
Settings
Registration
Search
Action
Approved Role
File Name
Company Name
Accreditation or SDL No
Verified
Financial Year: 2024 - 12 items

Step 5.




Step 6. Once you done, you'll get an email notification


Notification of Skills Development Facilitator Registration

Dear **Matsimela Moloto**,
Please be advised that an SDF application has been submitted and awaits evaluation.

**Genpak (Pty) Ltd**

**L020731776**

Kind regards
FP & M SETA Team

The LMIS can be accessed by clicking the following link: Click here to log in

System will validate your data to ensure it adheres to our Data integrity rules. Once everything checks out. Your application will be sent, now we just must wait for the right Seta Staff to approve your request.

## 3. WSP & ATR

Now that your Access Request has been approved, you can proceed to WSP submissions. The access you have allows you to create WSP application for the organization that you got approved for.

### 3.1 Create WSP and ATR

To submit WSP, Follow these Steps:

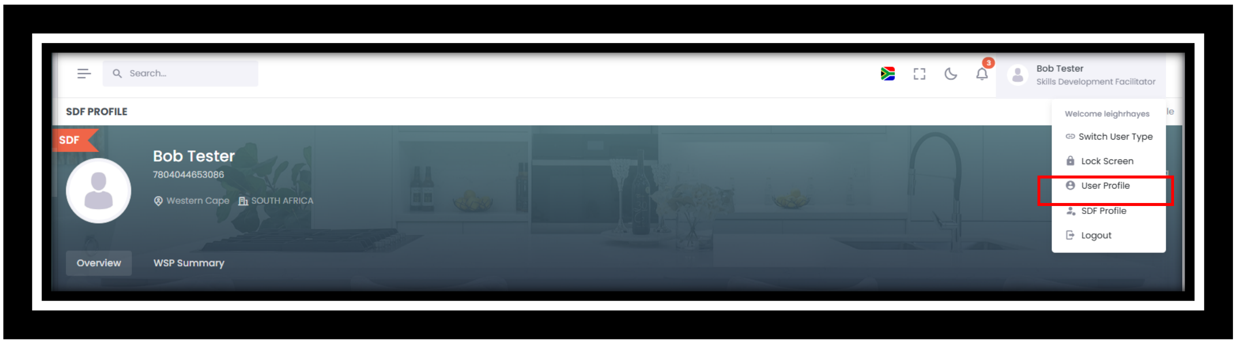
1. Click Username field at the top right corner of the screen, a list of options will appear.
2. From the list, select **"SDF Profile"**. Which will take the user to SDF Overview screen.
3. From SDF Overview screen, click **"WSP Summary"** Tab**.**
4. Right above Data Grid, Click **Add** button.
5. On the Next screen, Click **Start** Button at the bottom left of the screen. To begin capturing WSP details.
6. On Company details screen, fill the required information. Ensure you select the organization you're authorized to manage from the list.
7. Once all fields are filled, move to the next section by clicking **Go to contact's** button.
8. Fill all required fields and click **Go to Address** button.
9. Fill all required fields and click **Go to Banking** button.
10. Once you're done with banking details. Click **Save** button.

**Note:** System will perform data validation before moving to the next section, if you attempt to move to the next section without supplying valid data. The system won't allow you to access the next section. If you happen to be at Banking Details section, you won't be able to save WSP. System will enforce you to re-enter incorrect information before saving.

## 3.1.1 Virtual Guide

Step 1


Step 2




Step 3

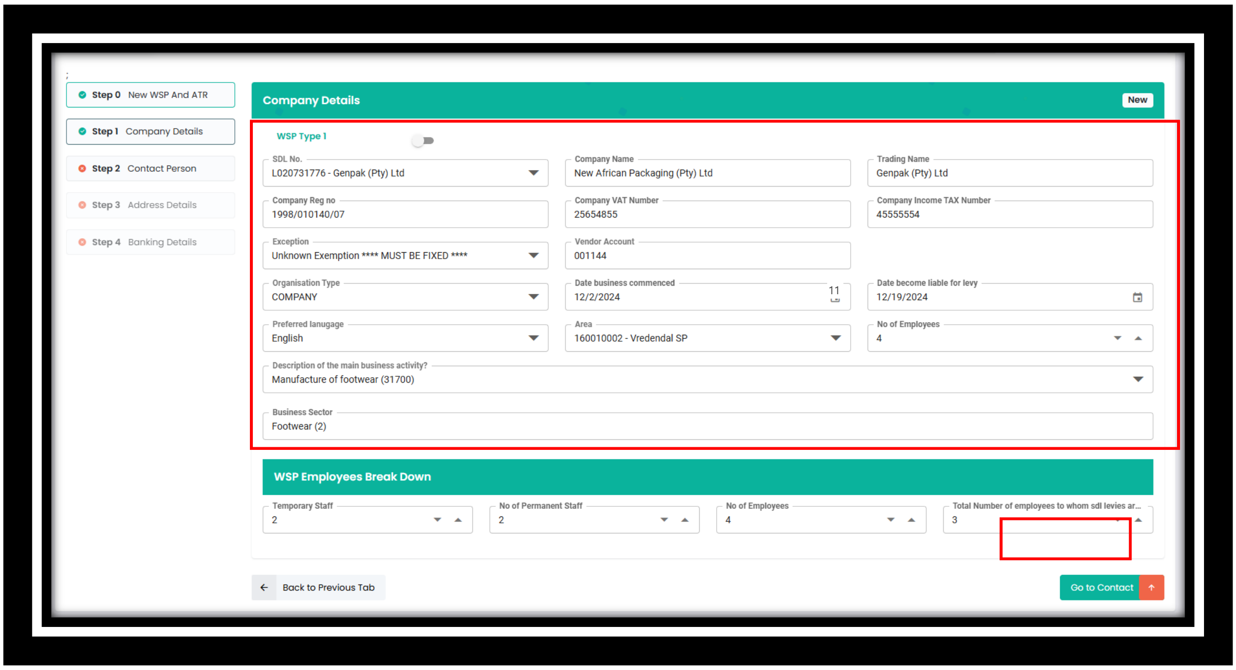
Step 4


SDF PROFILE
SDF > SDF Profile
SDF
Bob Tester
7804044653086
Western Cape
SOUTH AFRICA
24.3K
Followers
1.3K
Following
Overview
WSP Summary
WSP Submissions

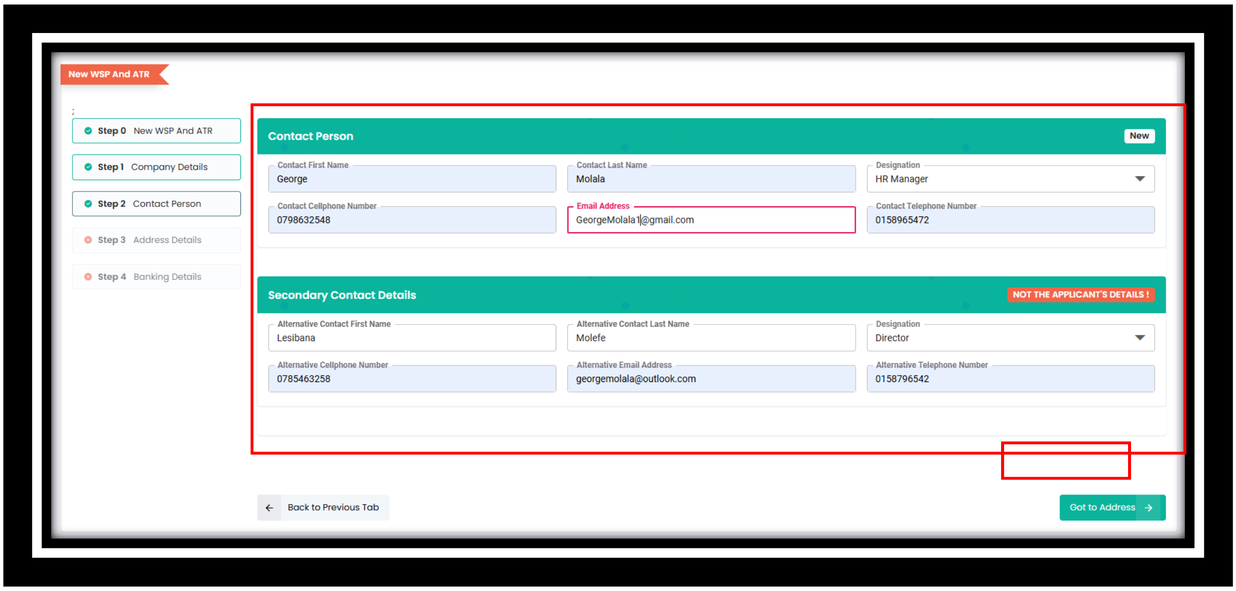
Step 5


WSPATR
SSP > WSPATR
New WSP And ATR
Step 0 New WSP And ATR
Step 1 Company Details
Step 2 Contact Person
Step 3 Address Details
Step 4 Banking Details
WSP And ATR
New
Kindly make sure that the key information about the company is captured, including the contact information.
Start

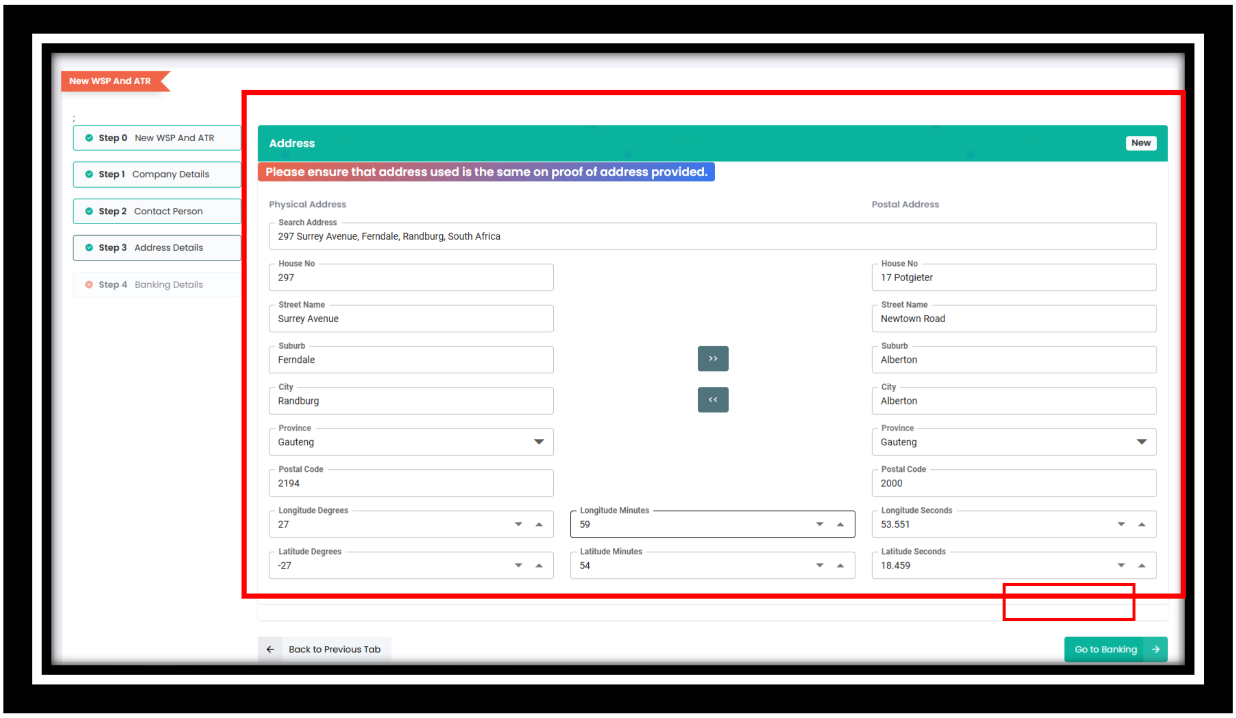
Step 6


Step 0 New WSP And ATR
Step 1 Company Details
Step 2 Contact Person
Step 3 Address Details
Step 4 Banking Details
Company Details
New
WSP Type 1
SDL No.
L020731776 - Genpak (Pty) Ltd
Company Name
New African Packaging (Pty) Ltd
Trading Name
Genpak (Pty) Ltd
Company Reg no
1998/010140/07
Company VAT Number
25654855
Company Income TAX Number
45555554
Exception
Unknown Exemption **** MUST BE FIXED ****
Vendor Account
001144
Organisation Type
COMPANY
Date business commenced
12/2/2024
Date become liable for levy
12/19/2024
Preferred lanugage
English
Area
160010002 - Vredendal SP
No of Employees
4
Description of the main business activity?
Manufacture of footwear (31700)
Business Sector
Footwear (2)
WSP Employees Break Down
Temporary Staff
2
No of Permanent Staff
2
No of Employees
4
Total Number of employees to whom sdl levies ar...
3
Back to Previous Tab
Go to Contact

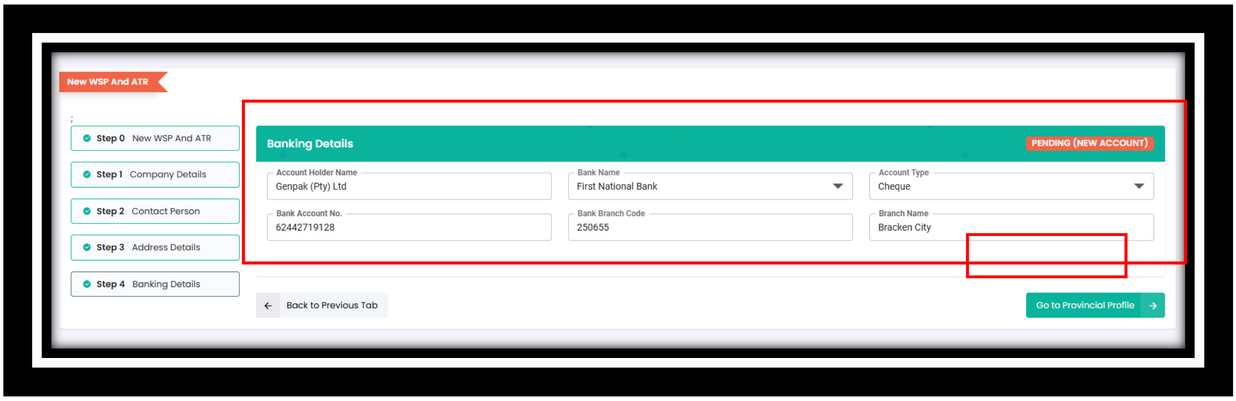
Step 7


New WSP And ATR
Step 0 New WSP And ATR
Step 1 Company Details
Step 2 Contact Person
Step 3 Address Details
Step 4 Banking Details
Contact Person
New
Contact First Name
George
Contact Last Name
Molala
Designation
HR Manager
Contact Cellphone Number
0798632548
Email Address
GeorgeMolala1@gmail.com
Contact Telephone Number
0158965472
Secondary Contact Details
NOT THE APPLICANT'S DETAILS !
Alternative Contact First Name
Lesibana
Alternative Contact Last Name
Molefe
Designation
Director
Alternative Cellphone Number
0785463258
Alternative Email Address
georgemolala@outlook.com
Alternative Telephone Number
0158796542
Back to Previous Tab
Got to Address

Step 8


New WSP And ATR
Step 0 New WSP And ATR
Step 1 Company Details
Step 2 Contact Person
Step 3 Address Details
Step 4 Banking Details
Address
New
Please ensure that address used is the same on proof of address provided.
Physical Address
Postal Address
Search Address
297 Surrey Avenue, Ferndale, Randburg, South Africa
House No
297
House No
17 Potgieter
Street Name
Surrey Avenue
Street Name
Newtown Road
Suburb
Ferndale
Suburb
Alberton
City
Randburg
City
Alberton
Province
Gauteng
Province
Gauteng
Postal Code
2194
Postal Code
2000
Longitude Degrees
27
Longitude Minutes
59
Longitude Seconds
53.551
Latitude Degrees
-27
Latitude Minutes
54
Latitude Seconds
18.459
Back to Previous Tab
Go to Banking

Step 9




At this point, the system will validate all the data you provided before attempting to save it. If everything checks out, the system will submit your WSP. A message will appear informing at top right of your screen verifying that your WSP was saved or not. If there's anything that stops your WSP from being saved, the system will let you know.

## 3.2 Configure WSP and ATR

Now that you have successfully created WSP, it is time to capture its details. By details, we refer to information such as Training committees, Employees, required documents and other WSP related data.

### 3.2.1 Company Profile

For this section, we focus on company information.

#### 3.2.1.1 Provincial

This section is mandatory especially if the Entity has more than one branch in different provinces. This part allows you to capture a Province in which each branch is located and how many branches in each province, the total number of staff employed at the branch, branch name and the branch contact number.

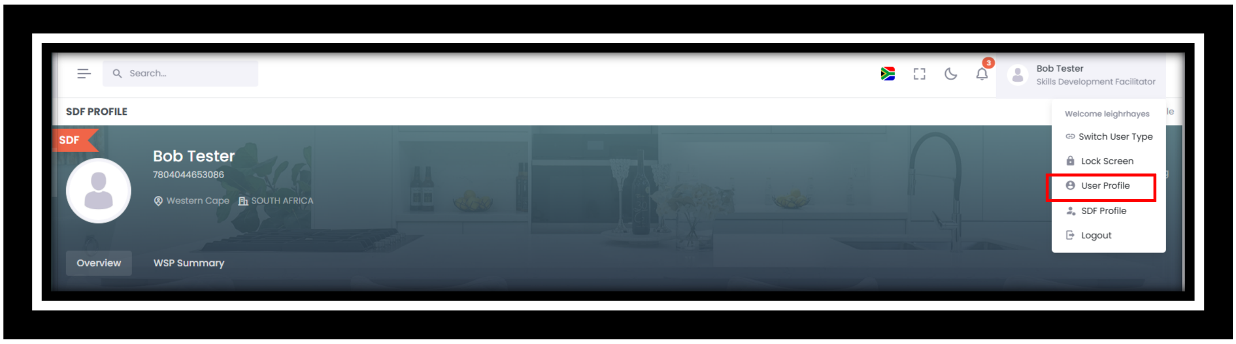
1. Click Username field at the top right corner of the screen, a list of options will appear.
2. From the list, select **"SDF Profile"**. Which will take the user to SDF Overview screen.
3. From SDF Overview screen, click **"WSP Summary"** Tab**.**
4. From the Grid, All WSP's you created will be listed there, if the Grid is empty. It means you haven't created any WSP. Since we created one, the Grid won't be empty. Select **WSP** you created earlier from the Grid.
5. Click **Company Profile** Tab
6. On **Provincial** Sub Tab, Click **Add** button.
7. Fill the modal pop up, Start by Selecting **Municipal** you're operating in from the Drop-down box.
8. Select your **Province** from drop down box.
9. Fill your **Branch Name**, **Contact Number of Branch**, **Total Permanent Staff** and **Total Temporary Staff**.
10. Once you're Done, Click **Save** Button.

**Note:** The system will validate your date, if everything checks out. Your data will be saved.

## Virtual Guide

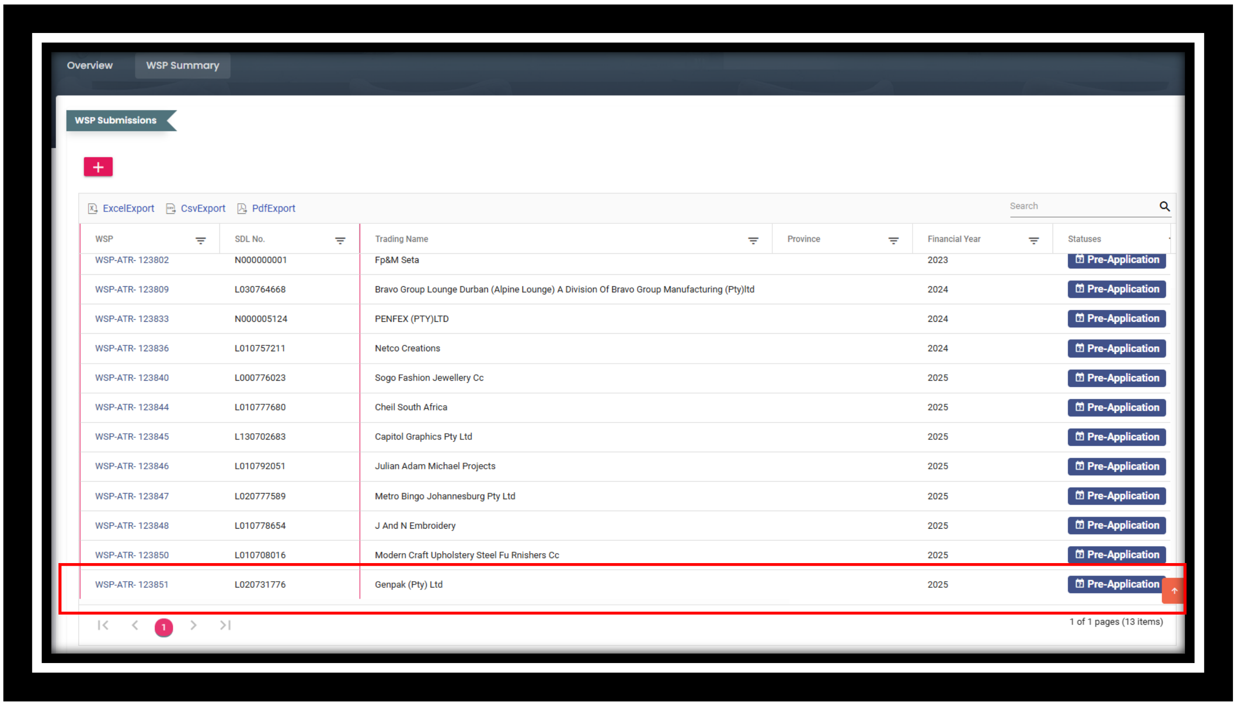
Step 1


Step 2.



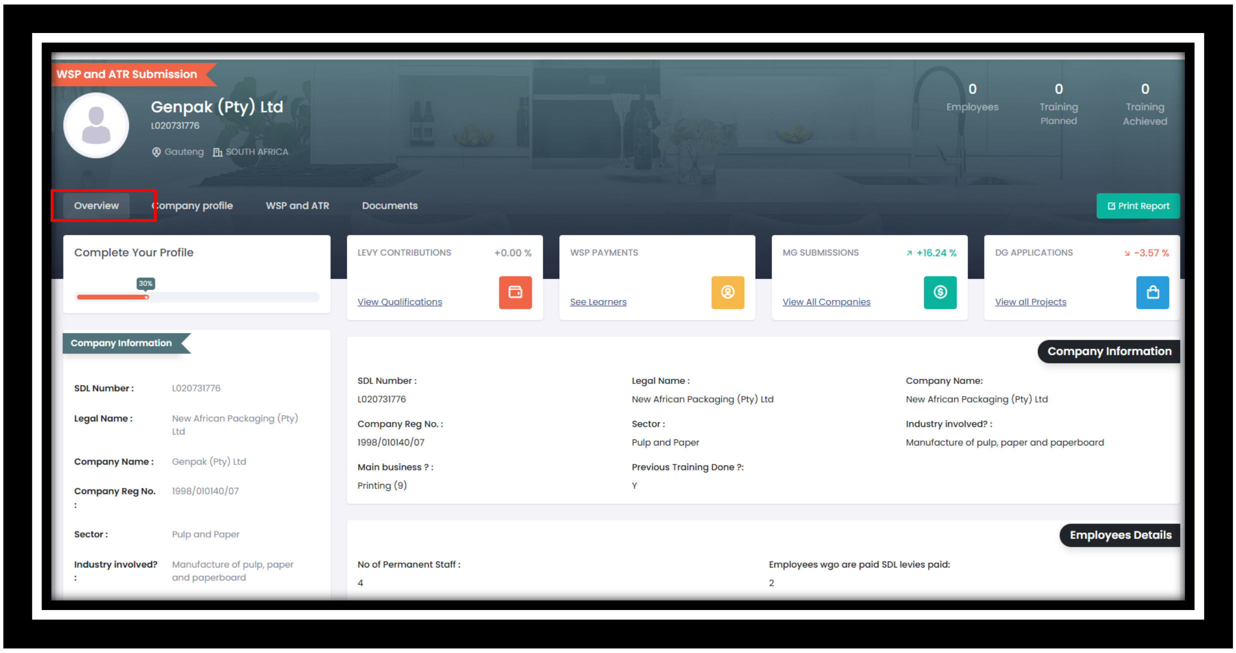

Step 3


Step 4.



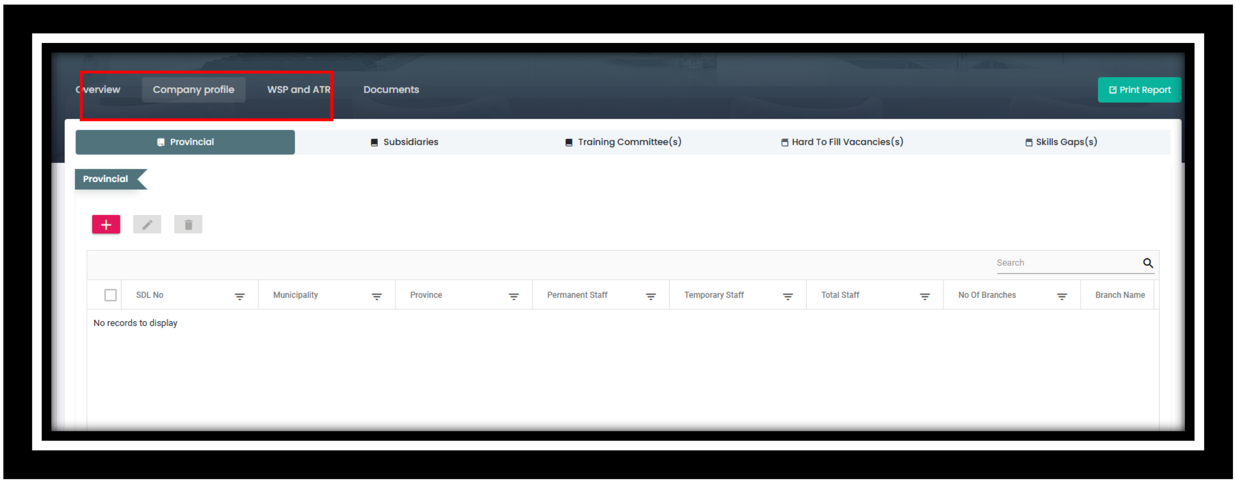

**Note:** For newly created WSP's, Status will be **Pre-Application**. This means the application is not complete. There's information missing. Once we are done supplying all information required. The status will change.

Step 5.

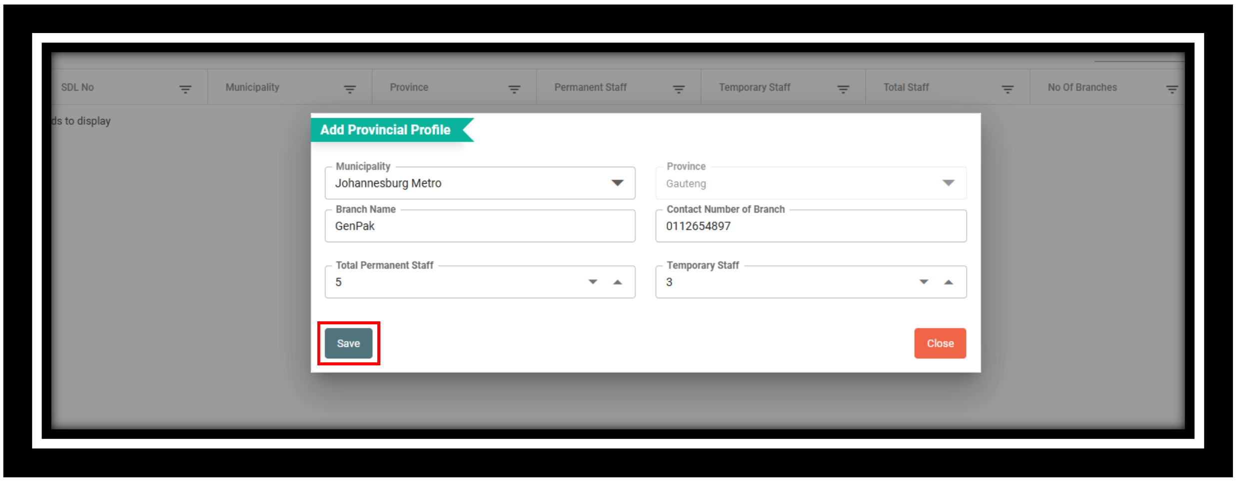



**Note:** All the information we captured when creating WSP will be displayed on overview page.

Step 6.




Step 7.




Step 8


### 3.2.1.2 Subsidiaries

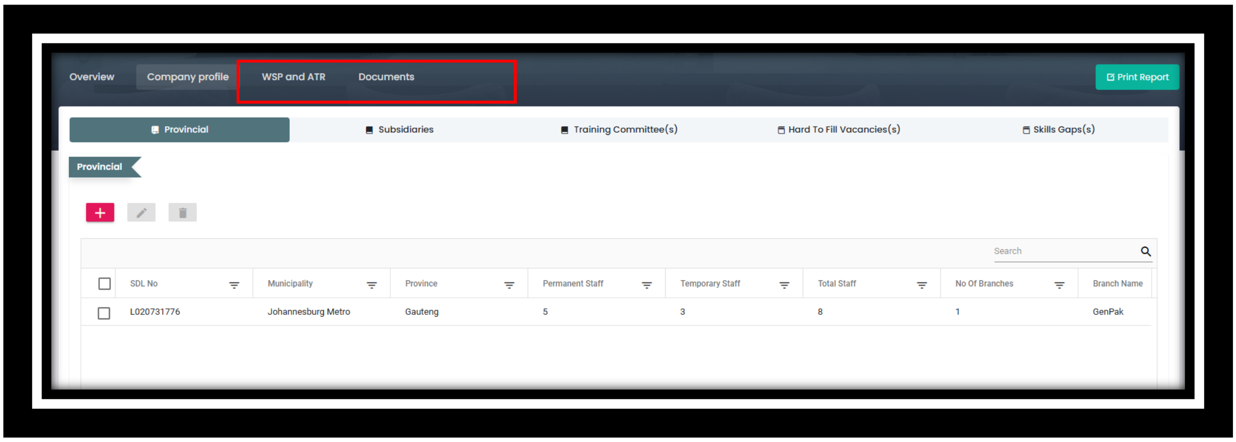
Now that you're done with Provincial, we can move forward to next section. For this section, we focus on Subsidiaries. To start capturing data, follow the steps below:

1. Click **Subsidiaries** Tab.
2. Under **Subsidiaries** Tab, Click **Add** button.
3. Populate the modal pop up, by Selecting **Secondary Company** from dropdown box. If you currently don't have any, you can skip.
4. Click **Save** button when you're done.

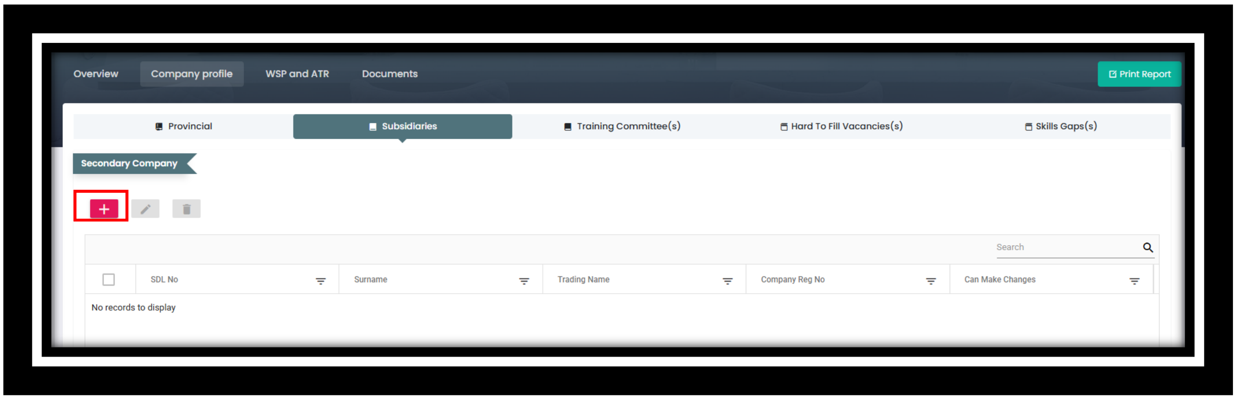
**Note:** A company that has already been captured as subsidiary or main company in the active WSP period cannot be added by another SDF.

### 3.2.1.2.1 Virtual Guide

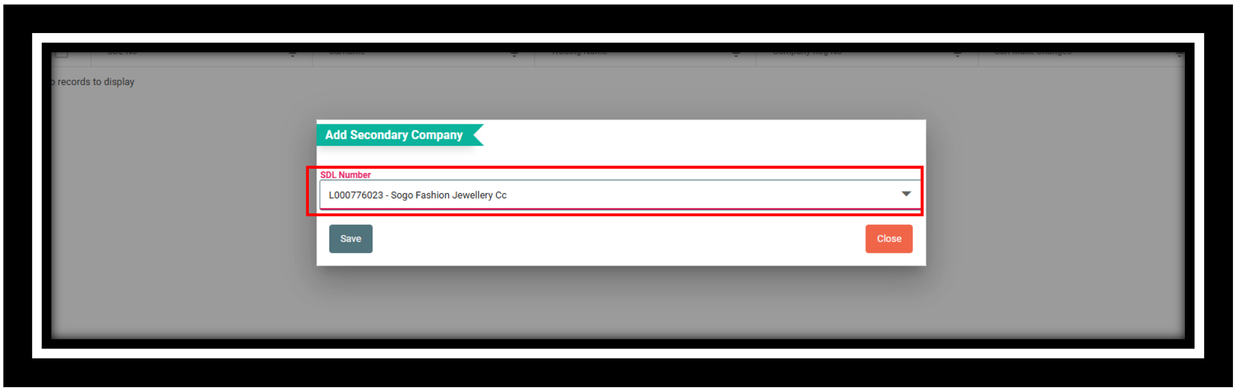
Step 1.



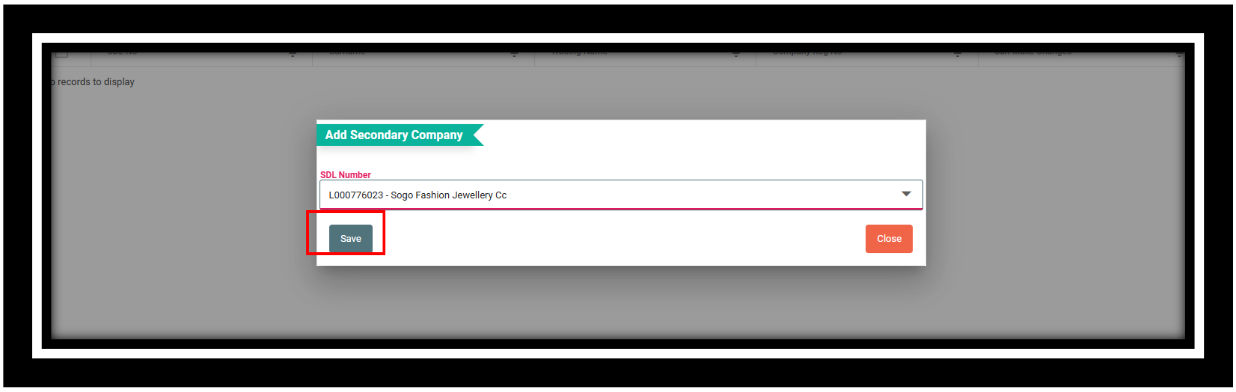

Step 2.




Step 3.




Step 4.




## 3.2.1.3 Training Committees

**Note:** This section records on the training committee details and is mandatory for those companies that have more than 50 employees otherwise the SDF can leave this section blank.

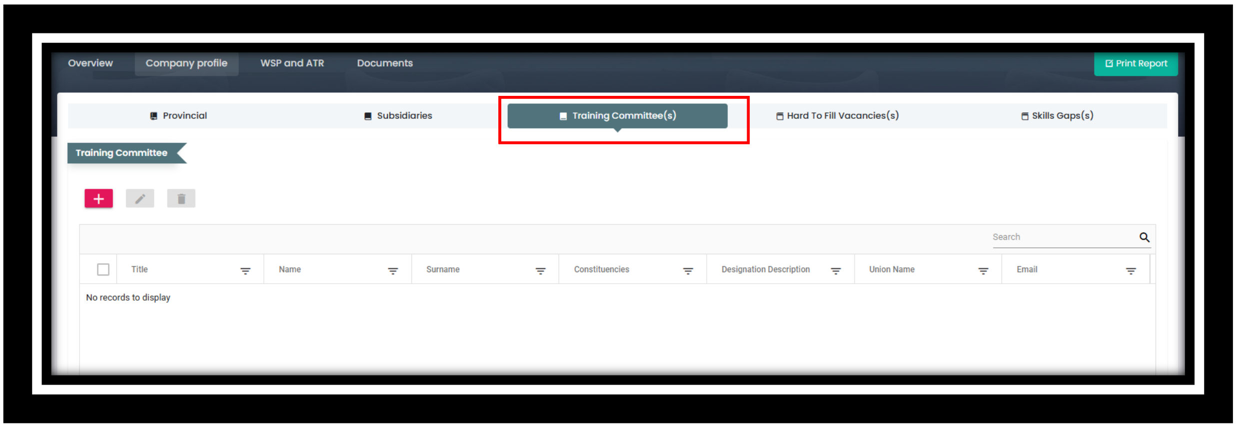
Now that you're done with Provincial, we can move forward to next section. For this section, we focus on Training Committees. To start capturing data, follow these steps below:

1. Click **Training Committees** Tab.
2. Under **Training Committees** Tab, Click **Add** button.
3. Populate the form with required information.
4. Click **Save** button when you're done.

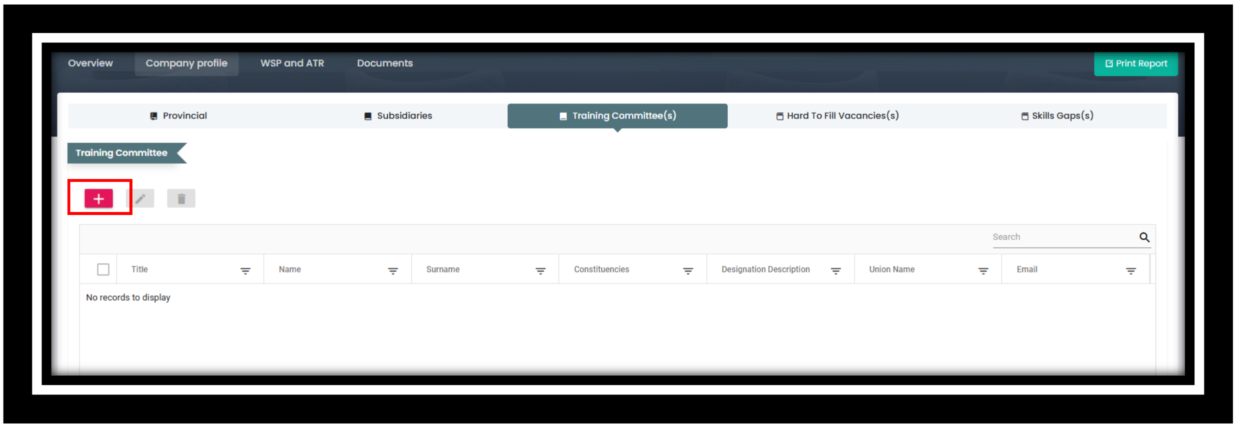
**Note:** The system will validate your information before saving it, if everything checks out. The system will save your data. You can add more than one Committee.

### 3.2.1.3.1 Virtual Guide

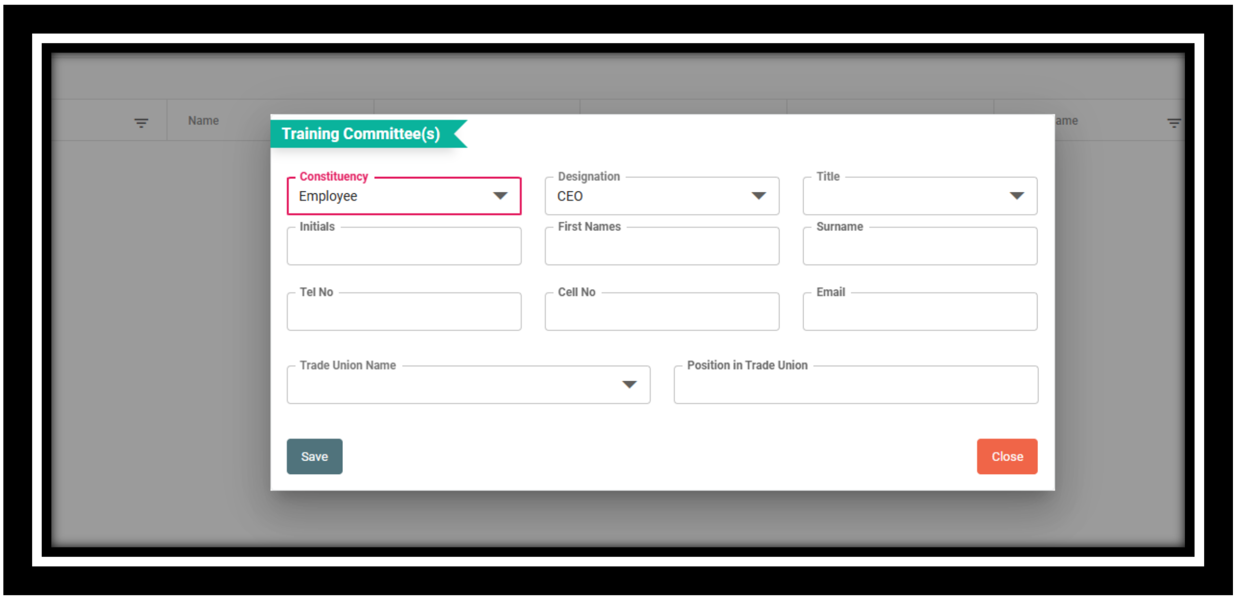
Step 1.



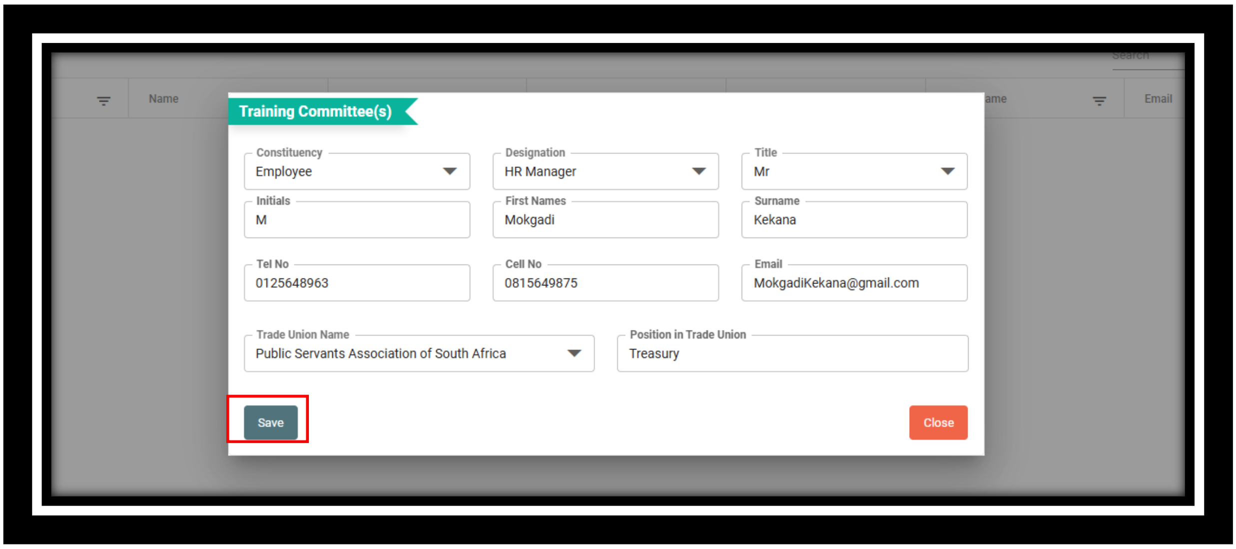

Step 2.


Overview
Company profile
WSP and ATR
Documents
Print Report
Provincial
Subsidiaries
Training Committee(s)
Hard To Fill Vacancies(s)
Skills Gaps(s)
Training Committee
Search
Title
Name
Surname
Constituencies
Designation Description
Union Name
Email
No records to display

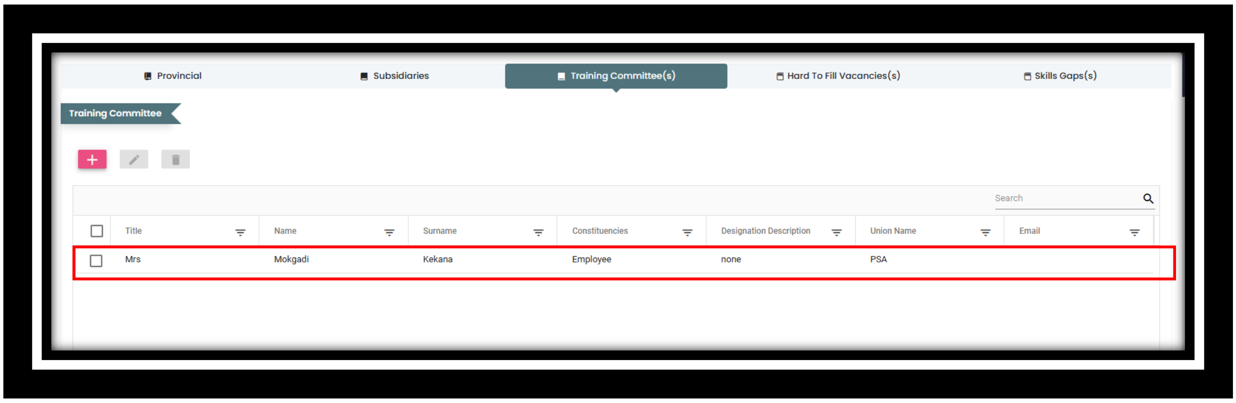
Step 3.


Training Committee(s)
Constituency
Employee
Designation
CEO
Title
Initials
First Names
Surname
Tel No
Cell No
Email
Trade Union Name
Position in Trade Union
Save
Close

Step 4.


Training Committee(s)
Constituency
Employee
Designation
HR Manager
Title
Mr
Initials
M
First Names
Mokgadi
Surname
Kekana
Tel No
0125648963
Cell No
0815649875
Email
MokgadiKekana@gmail.com
Trade Union Name
Public Servants Association of South Africa
Position in Trade Union
Treasury
Save
Close

Step 5


Provincial
Subsidiaries
Training Committee(s)
Hard To Fill Vacancies(s)
Skills Gaps(s)
Training Committee
Search
Title
Name
Surname
Constituencies
Designation Description
Union Name
Email
Mrs
Mokgadi
Kekana
Employee
none
PSA

### 3.2.1.4 Hard to Fill Vacancies

Hard to Fill vacancies are vacancies that take longer than 6 months to fill, this section allows the SDF to capture **Hard to Fill Vacancies** by occupation per Province. Deselect the check box if there are **Hard to Fill Vacancies**.

To capture this part, follow the Steps below:

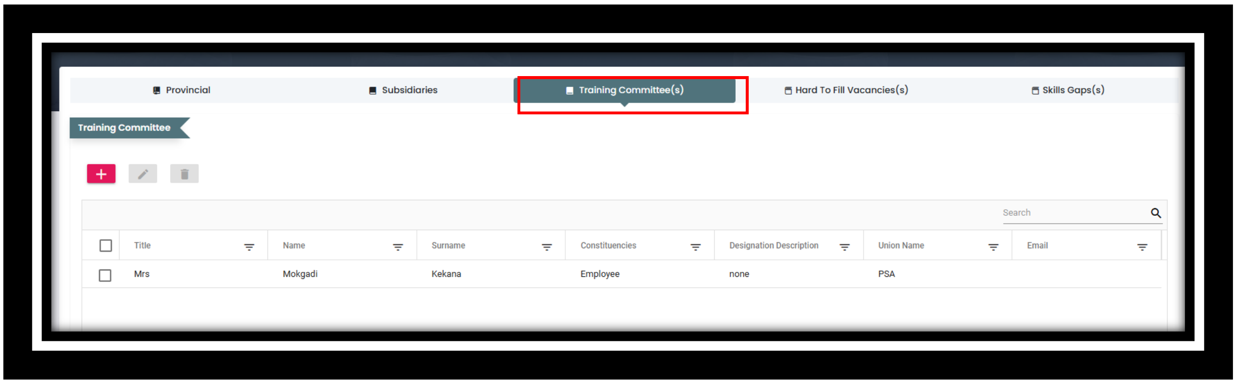
1. Click **Hard to Fill Vacancies** Tab.
2. Under **Hard to Fill Vacancies** Tab, Click **Add** button.
3. Populate the form with required information.
4. Click **Save** button when you're done.

Note: The system will validate your information before saving it, if everything checks out. The system will save your data. You can add more than one Hard to Fill Vacancies.

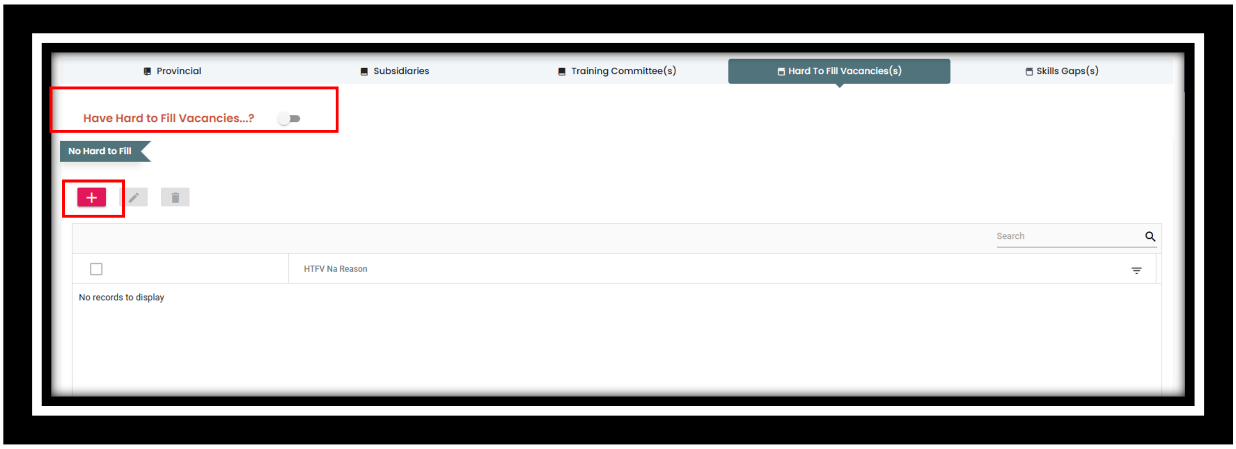
If there is more than one Hard to Fill vacancy within the Organization, the SDF has the option to create more than one entry for Hard to Fill vacancy.

#### 3.2.1.4.1 Virtual Guide

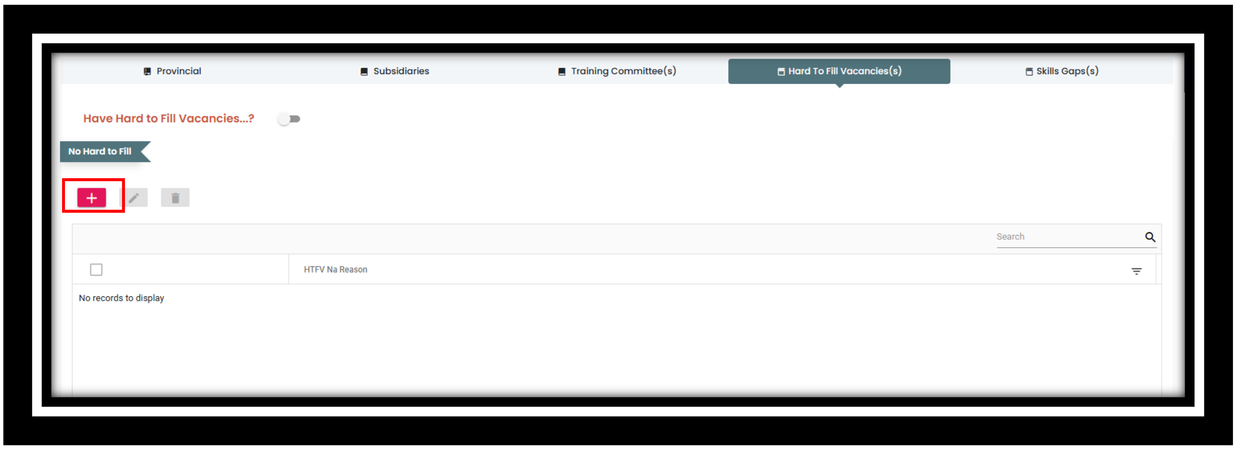
Step 1.


Provincial
Subsidiaries
Training Committee(s)
Hard To Fill Vacancies(s)
Skills Gaps(s)
Training Committee
Search
Title
Name
Surname
Constituencies
Designation Description
Union Name
Email
Mrs
Mokgadi
Kekana
Employee
none
PSA

Step 2.

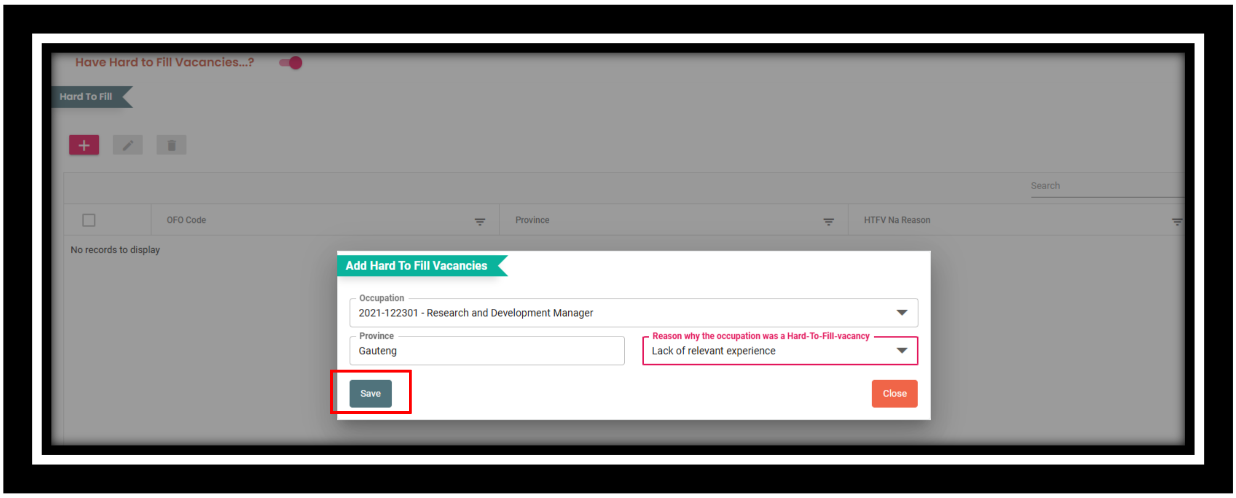

Provincial
Subsidiaries
Training Committee(s)
Hard To Fill Vacancies(s)
Skills Gaps(s)
Have Hard to Fill Vacancies...?
No Hard to Fill
Search
HTFV Na Reason
No records to display

Step 3.


Provincial
Subsidiaries
Training Committee(s)
Hard To Fill Vacancies(s)
Skills Gaps(s)
Have Hard to Fill Vacancies...?
No Hard to Fill
Search
HTFV Na Reason
No records to display

Step 4. If there are no Hard to Fill Vacancies.


Step 5. If there are Hard to Fill Vacancies.



### 3.2.1.5 Skills Gaps

The Skills Gap section of the WSP further indicates the Skills shortages within an Organization. Deselect the check box if there are no **Skills Gap** to fill.

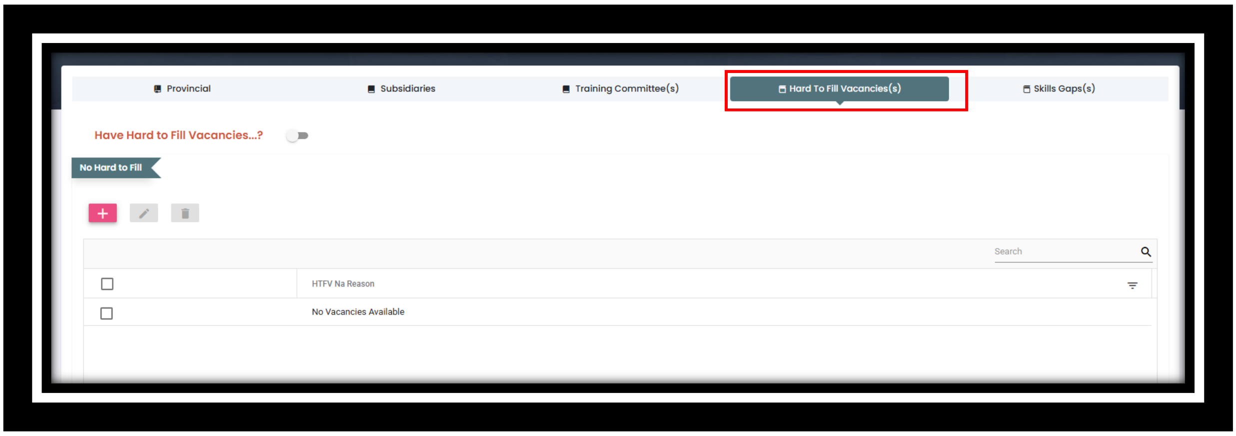
To capture this information, follow these Steps below:

1. Click **Skills Gaps** Tab.
2. Under **Skills Gaps** Tab, Click **Add** button.
3. Populate the form with required information.
4. Click **Save** button when you're done.

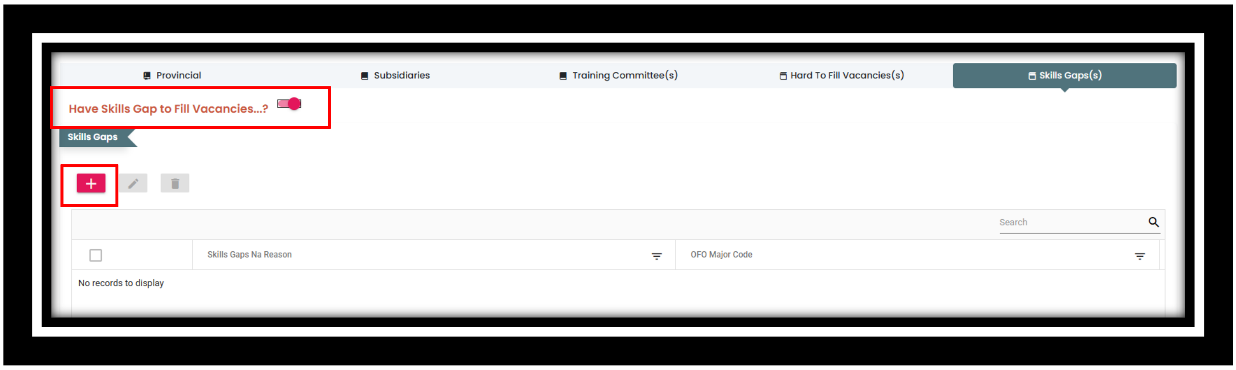
**Note:** The system will validate your information before saving it, if everything checks out. The system will save your data.

#### 3.2.1.5.1 Virtual Guide

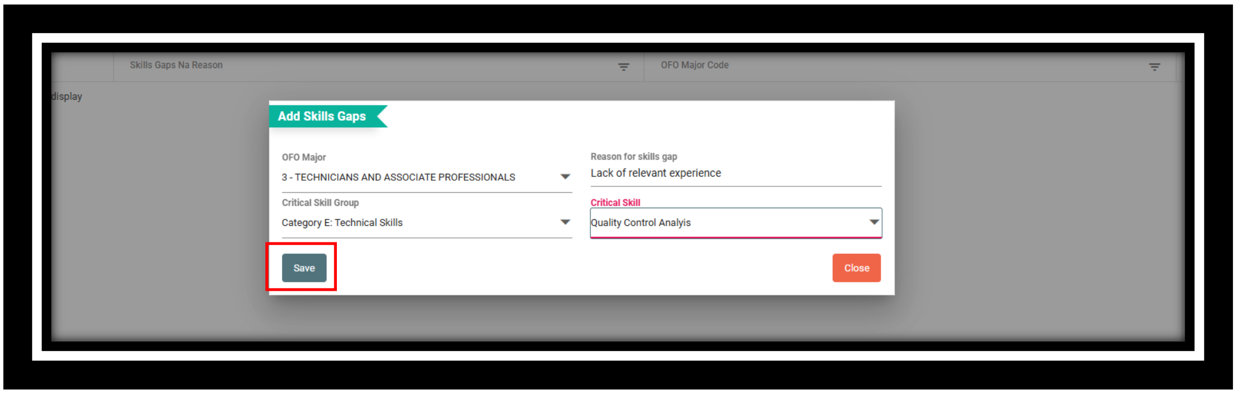
Step 1.



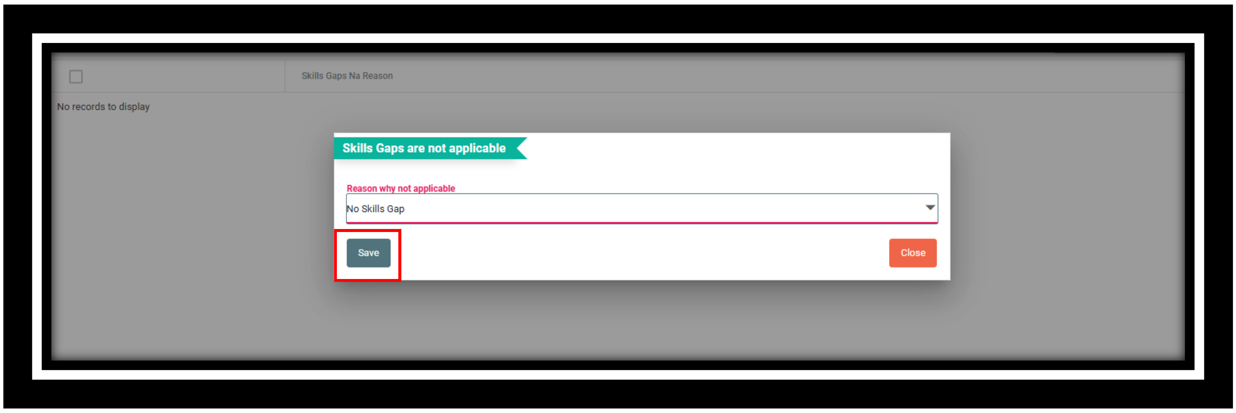
Step 2. If there are Skills to fill.




Step 3.




Step 4. Without Skills to fill.



### 3.2.2 WSP and ATR

Once you're done capturing Company Profile, we move to WSP and ATR. To navigate to WSP and ATR, follow these Steps:

1. From **Company Profile** Tab, Click **WSP and ATR** Tab.

#### 3.2.2.1 Employees

This Tab is used to capture Employees concerned with Training and Report, Employees can be captured via 3 methods that is: manually, importing from previous year WSP or importing from an excel spreadsheet that follows the supplied template by the SETA.

#### Manual Capture

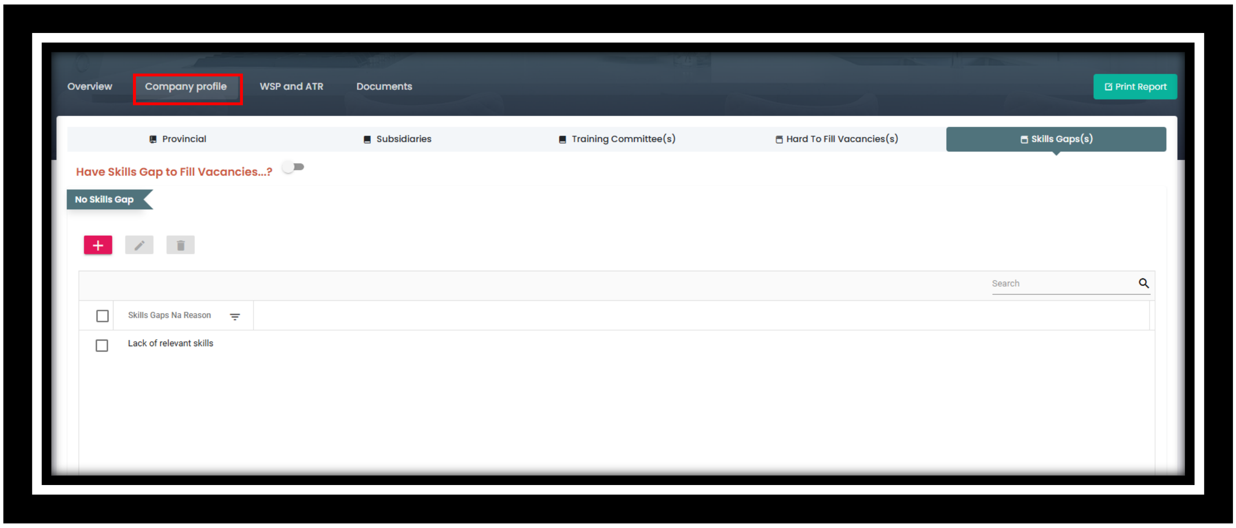
To Capture Employees manually, follow these Steps:

1. Under **Employees** Tab, Click **Add** button.
2. Capture Employee Details.
3. Once done, Click **Save**.

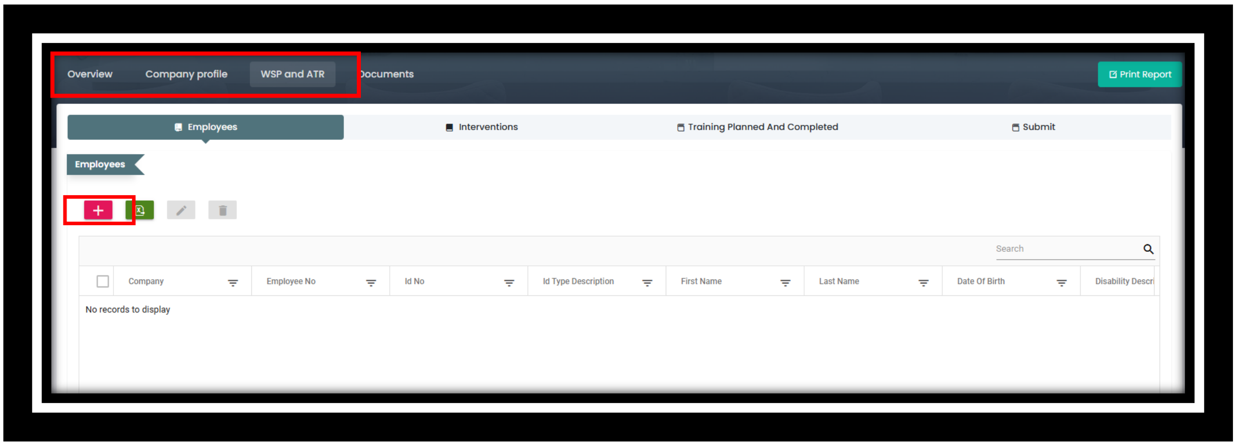
**Note:** The system will validate your information before saving it, if everything checks out. The system will save your data. You can add more than one Hard to Fill Vacancies.

##### 3.2.2.1.1 Virtual Guide

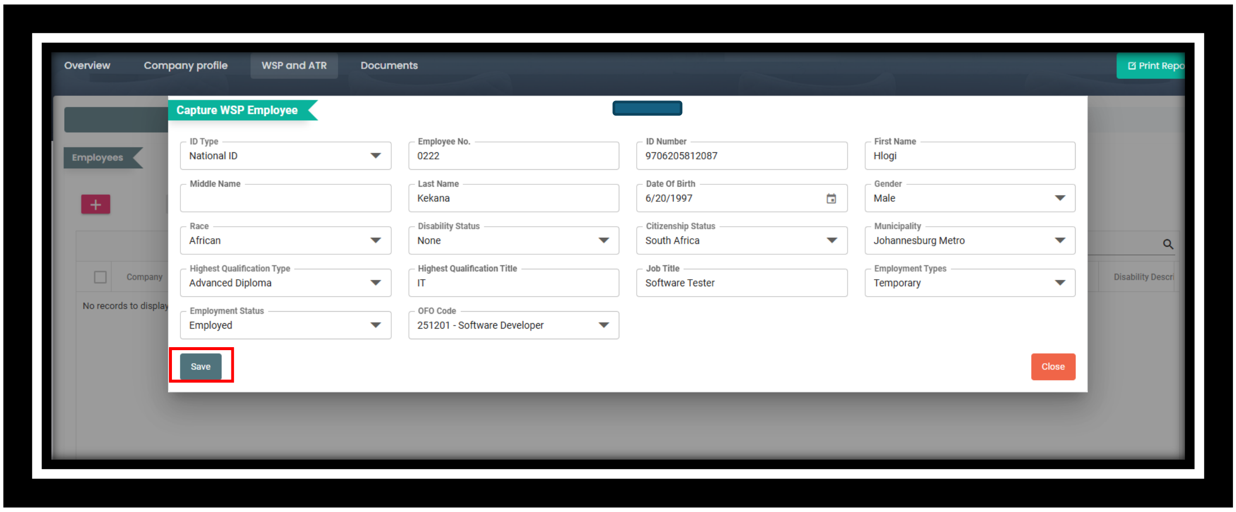
Step 1.


Overview
Company profile
WSP and ATR
Documents
Print Report
Provincial
Subsidiaries
Training Committee(s)
Hard To Fill Vacancies(s)
Skills Gaps(s)
Have Skills Gap to Fill Vacancies...?
No Skills Gap
Search
Skills Gaps Na Reason
Lack of relevant skills

Step 2.


Overview
Company profile
WSP and ATR
Documents
Print Report
Employees
Interventions
Training Planned And Completed
Submit
Employees
Search
Company
Employee No
Id No
Id Type Description
First Name
Last Name
Date Of Birth
No records to display

Step 3



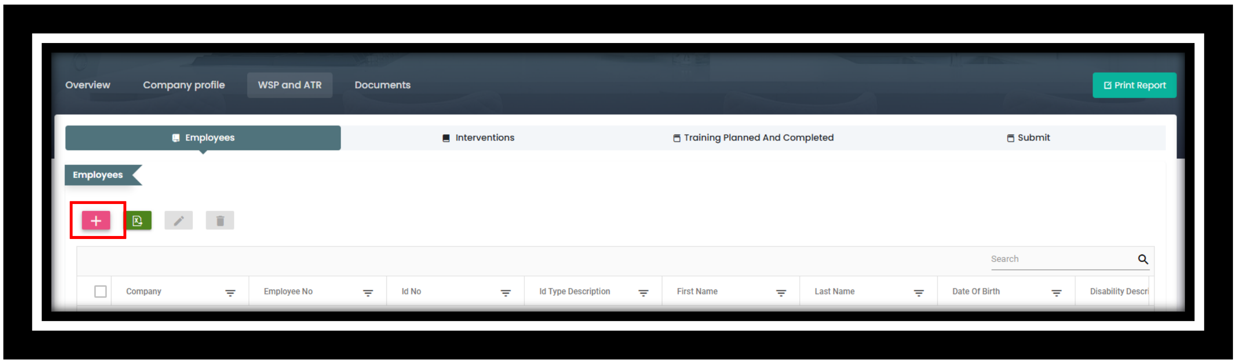

## Excel Import

To Capture Employees by Excel, follow these Steps:

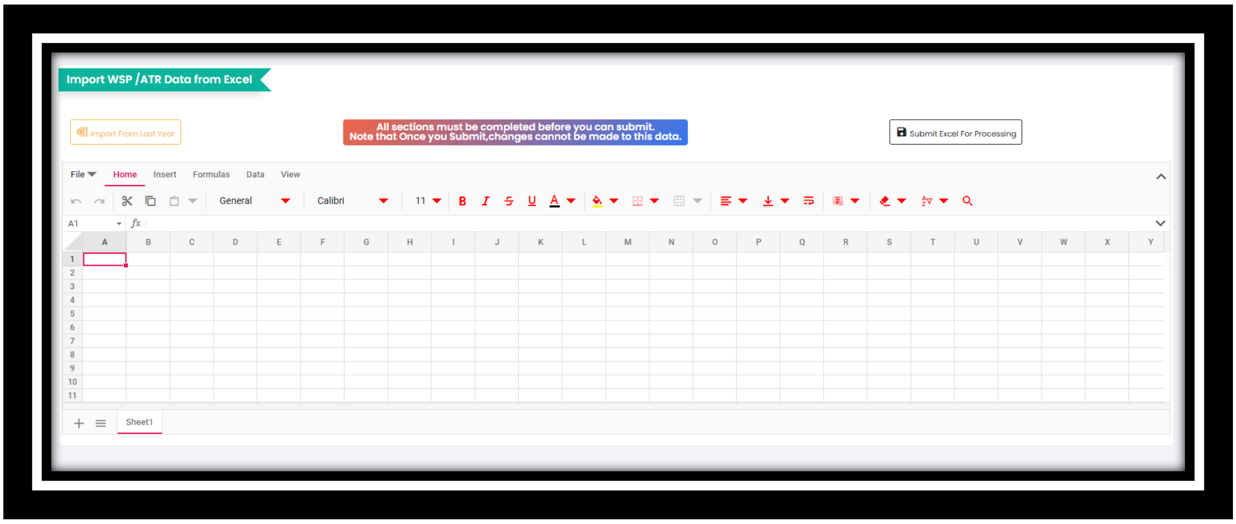
1. Under **Employees** Tab, Click **Excel** button.
2. Excel Spreadsheet will open, Manually Type Employee information. Each Column represents ID Type, Employee No, ID Number, First Name, Middle Name, Last Name, Date of Birth, Gender, Race, Disability Status, Citizenship Status, Municipal, Highest Qualification Type, Highest Qualification Title, Job Title, Employment Type, Employment Status, OFO Code.
3. Once all fields are added, Click **File** button. Select **Save As** and click **Microsoft Excel**.
4. If your Data Passes all validation rules set in place. Your file will be saved.

### 3.2.2.1.1 Virtual Guide

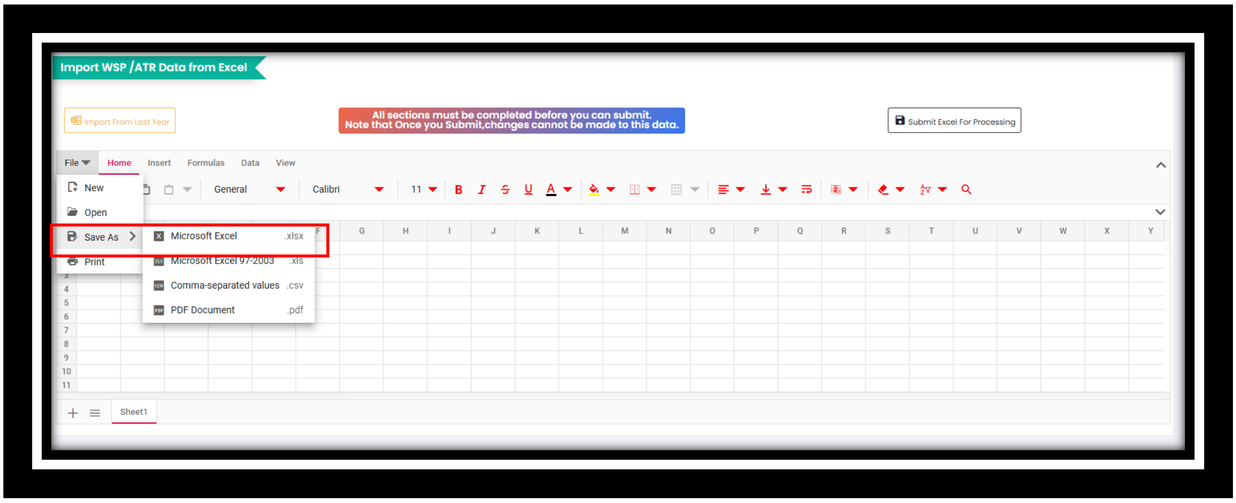
Step 1.




Step 2. Fill employee data




Step 3



### 3.2.2.2 Interventions

This part allows capturing the interventions that are going to be done for the plan and what has already been trained on.

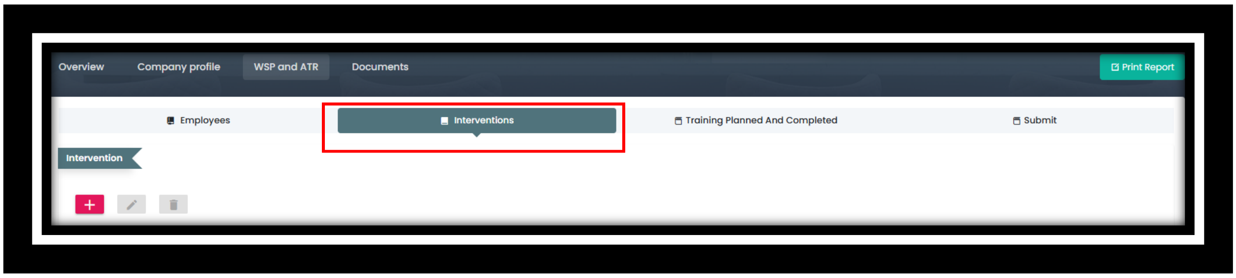
Once you done with Employees, you can proceed to capture Interventions. To do that, follow the Steps below:

1. Click **Interventions** Tab.
2. Under Interventions Tab, Click **Add** button.
3. Capture **Interventions** Details.
4. Once done, Click **Save**.

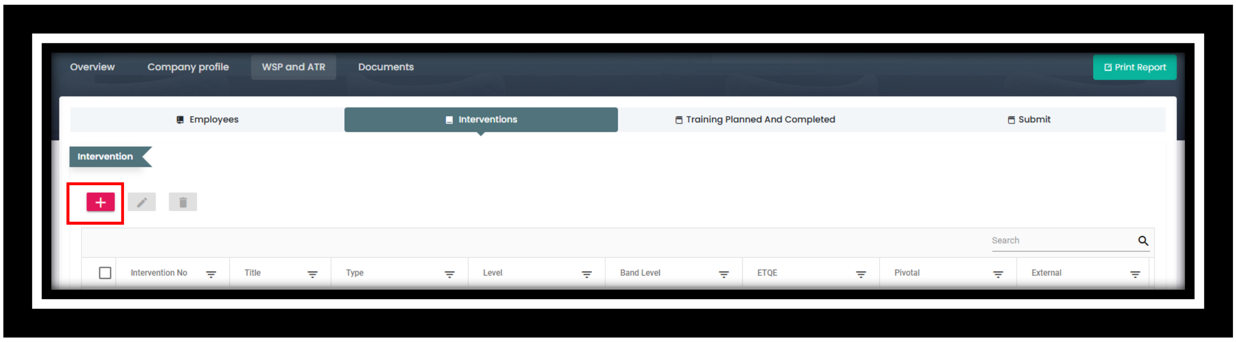
**Note:** The system will validate your information before saving it, if everything checks out. The system will save your data.

#### 3.2.2.2.1 Virtual Guide

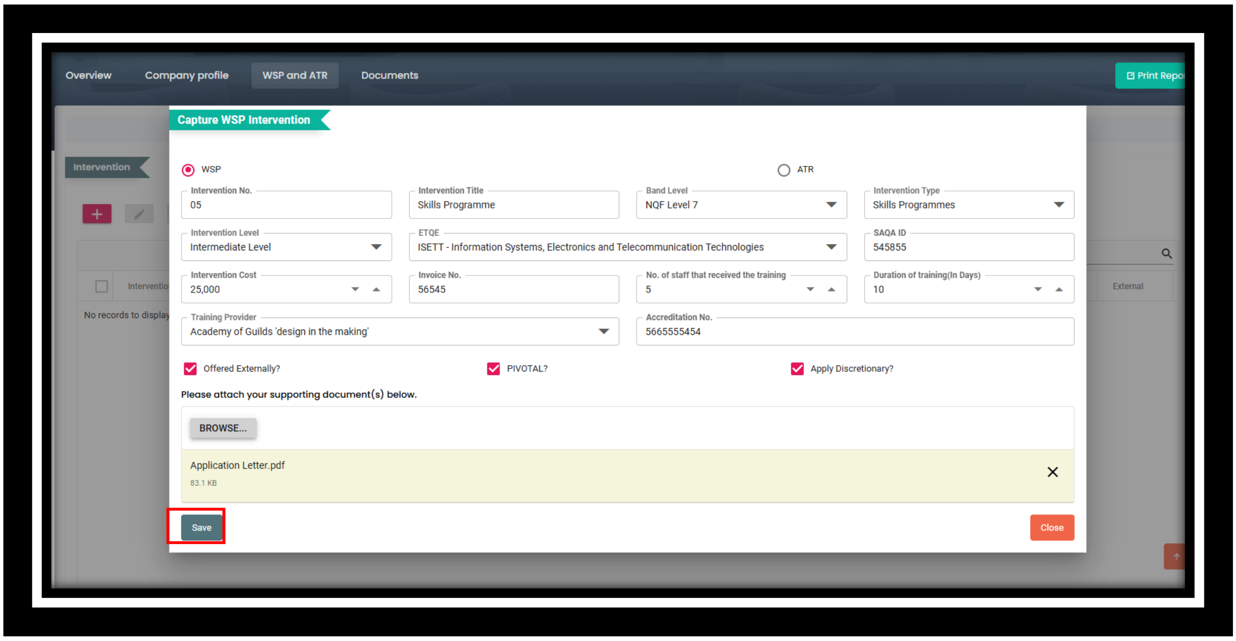
Step 1.



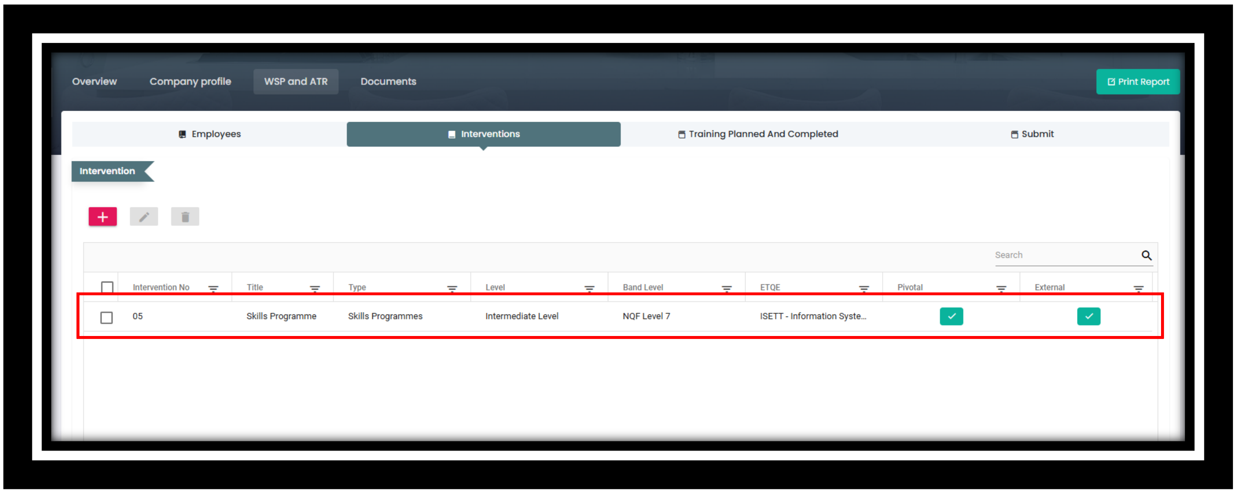

Step 2.




Step 3.




Step 4.




### 3.2.2.3 Training Planned and Completed

This part allows capturing the employee interventions that are going to be done for the plan and what has already been trained on.

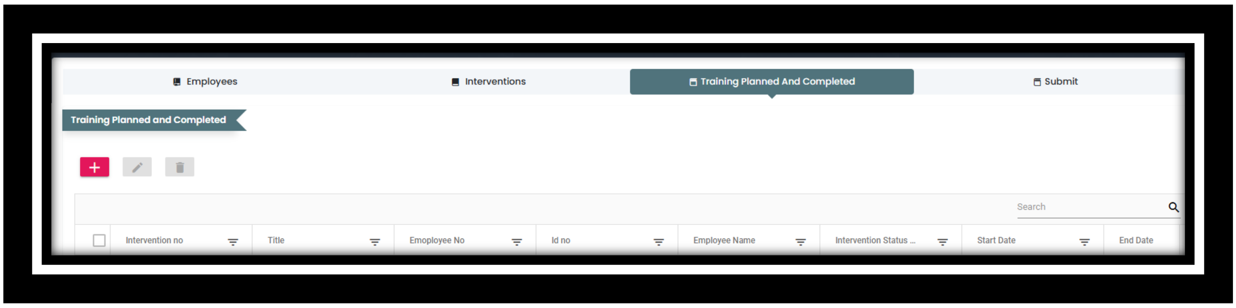
Once you done with Interventions, you can proceed to capture Training Planned and Completed. To do that, follow the Steps below:

1. Click **Training Planned and Completed** Tab.
2. Under Training Planned and Completed Tab, Click **Add** button.
3. Capture **Training Planned and Completed** Details.
4. Once done, Click **Save**.

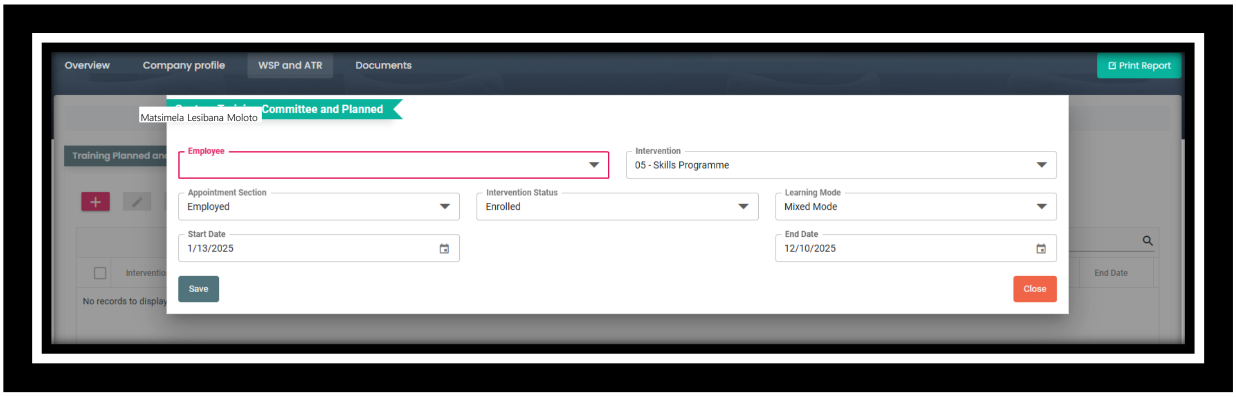
**Note:** The system will validate your information before saving it, if everything checks out. The system will save your data.

### 3.2.2.3.1 Virtual Guide

Step 1.

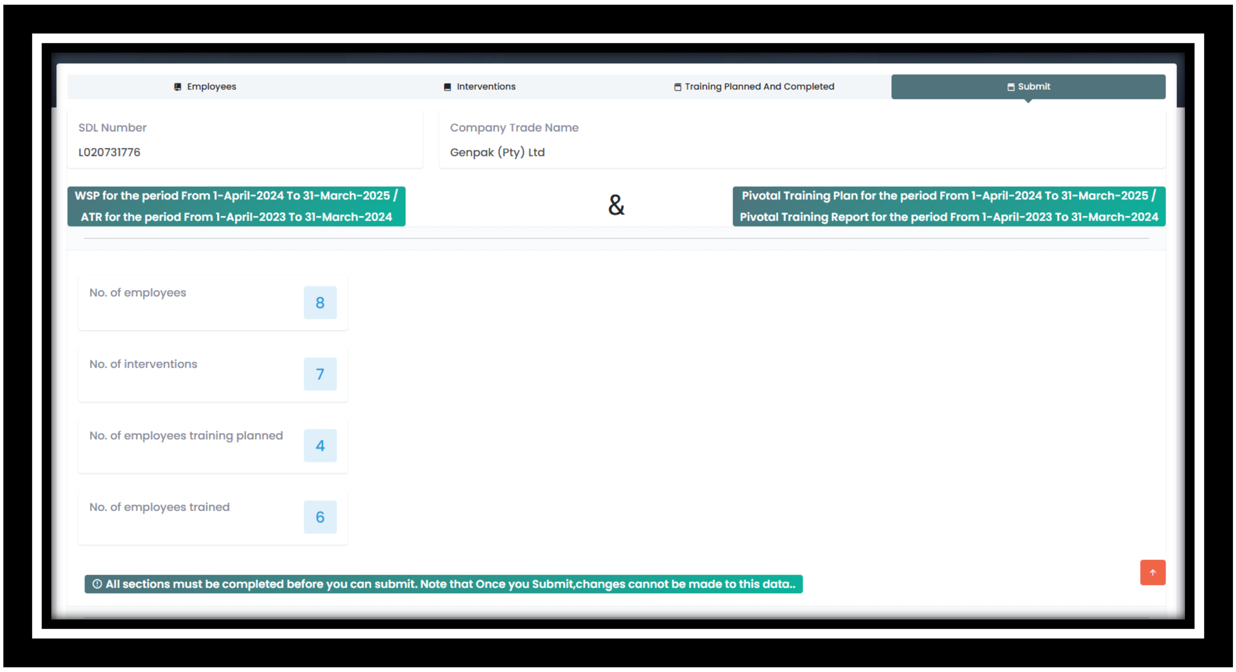



Step 2.




## 3.2.2.4 Submit

The last step remaining now is to submit the WSP. To do that navigate to **Submit** Tab. If everything that is required has been captured successfully, the system will submit our WSP.



### 3.2.3 Supporting Documents

The Documents TAB allows the SDF to upload three types of documents:

- Authorization Document
- Proof of Banking Details Document
- Training Committee minutes Document

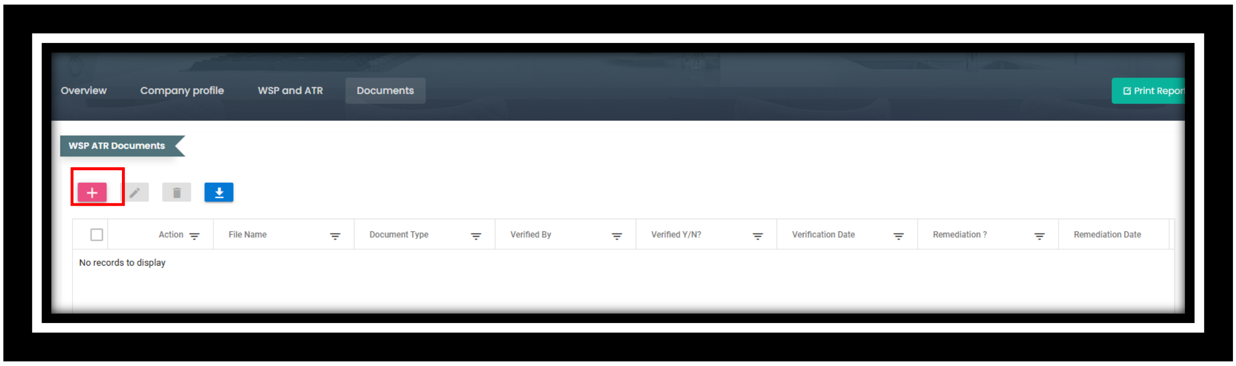
To upload these documents, follow these Steps.

1. Click **Documents** Tab.
2. Under Documents Tab, Click **Add** button.
3. Select Appropriate Document Type from **Document Type** Dropdown Box.
4. Add Comments if necessary.
5. Click **Browse** and Select the Document From your machine or cloud.
6. Once done, Click **Save** button.

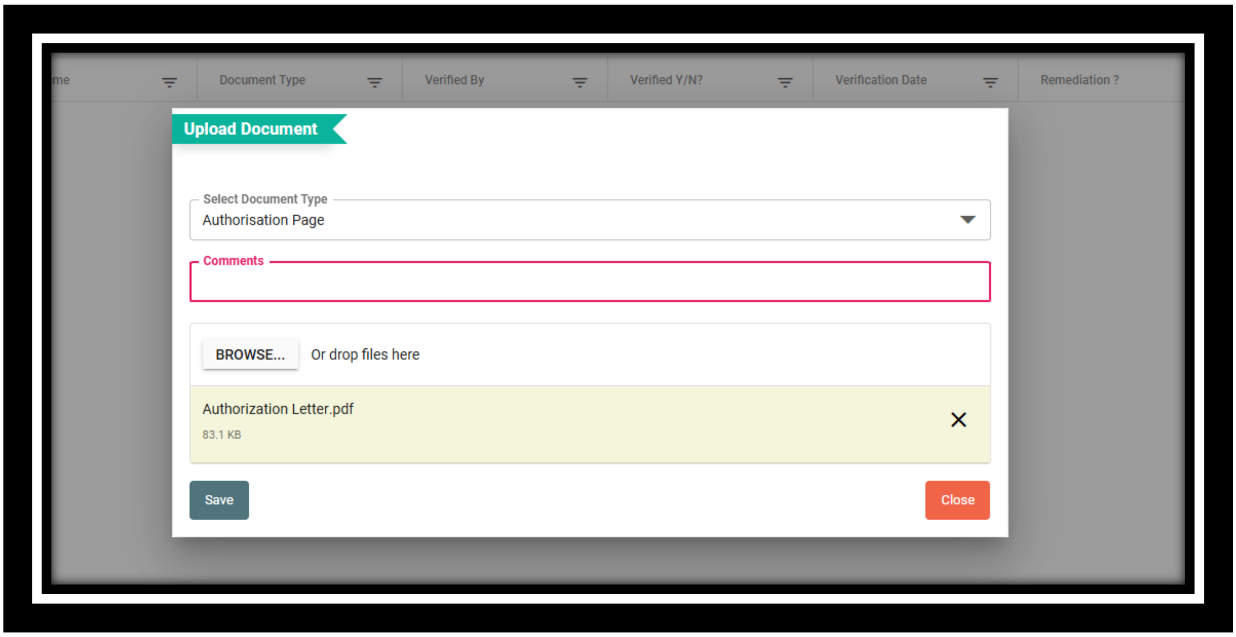
**Note:** The system will validate your document before saving it, if everything checks out. The system will save your document. Before saving your document, make sure it is PDF file less than 5mb file size.

### 3.2.3.1.1 Virtual Guide

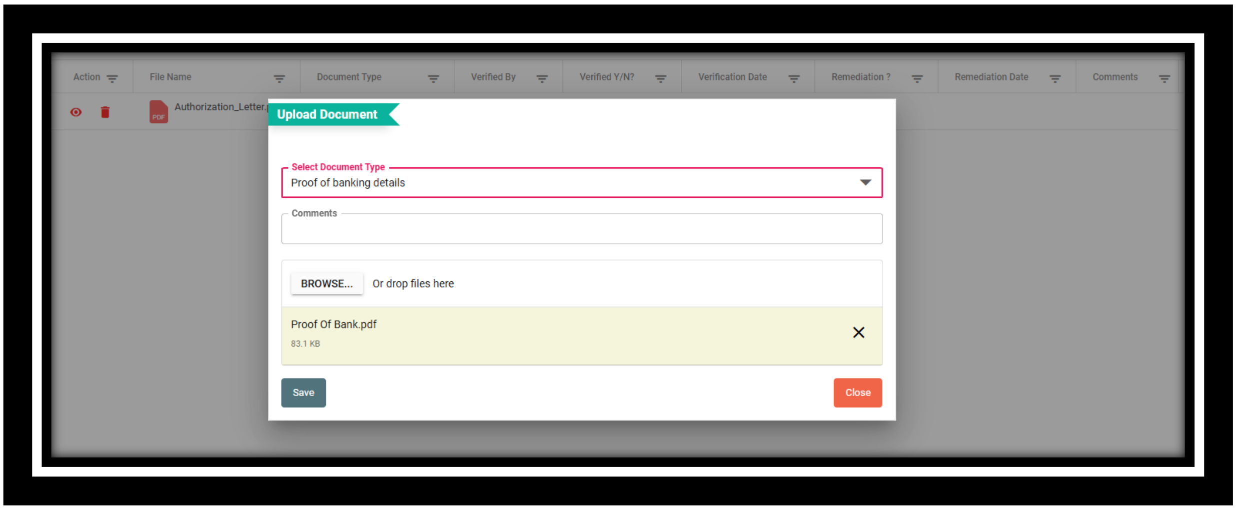
Step 1.



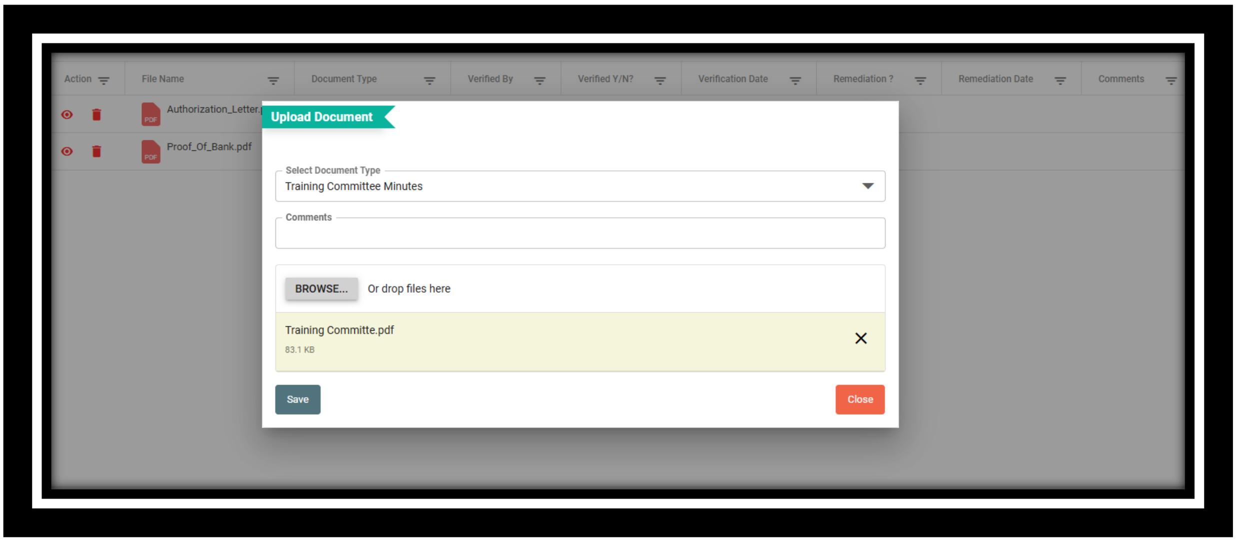

Step 2.



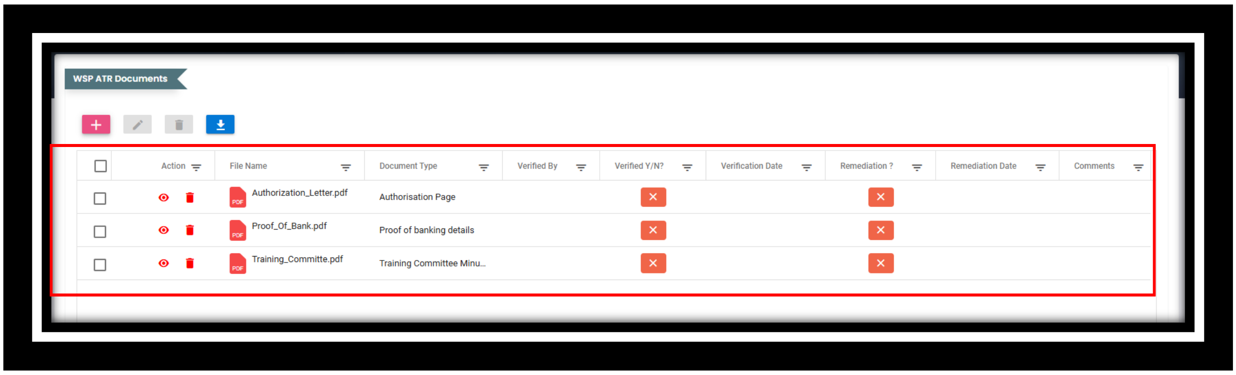
Step 3.




Step 4.




Step 5.


WSP ATR Documents
Action
File Name
Document Type
Verified By
Verified Y/N?
Verification Date
Remediation ?
Remediation Date
Comments
Authorization_Letter.pdf
Authorisation Page
Proof_Of_Bank.pdf
Proof of banking details
Training_Committe.pdf
Training Committee Minu...