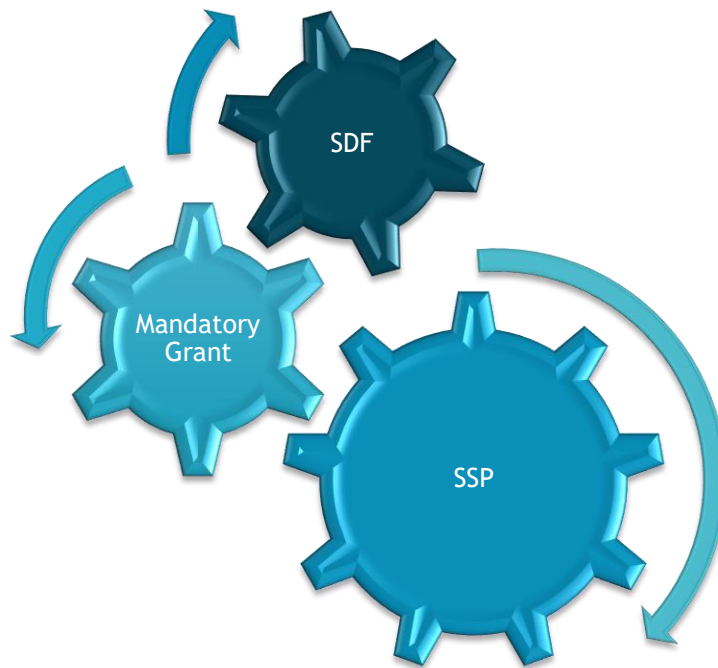




# Employer Management

## User Guide



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## 1 OVERVIEW

Microsoft Dynamics 365 for Employer Management is designed to define critical data, providing users with a centralized point of reference for efficient management of service requests, production activities, and overall operations.



- Employer Data Management (SDL employer file)



- Skills Development Facilitator Registration (SDF)



- Mandatory Grant submission.



- Inter-Seta Transfers

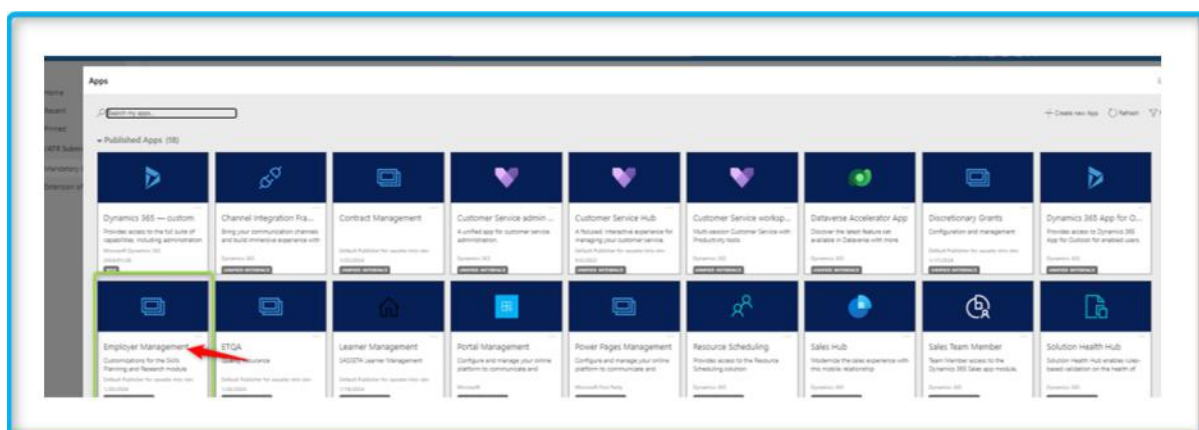


- Organising Framework for Occupations (OFO)

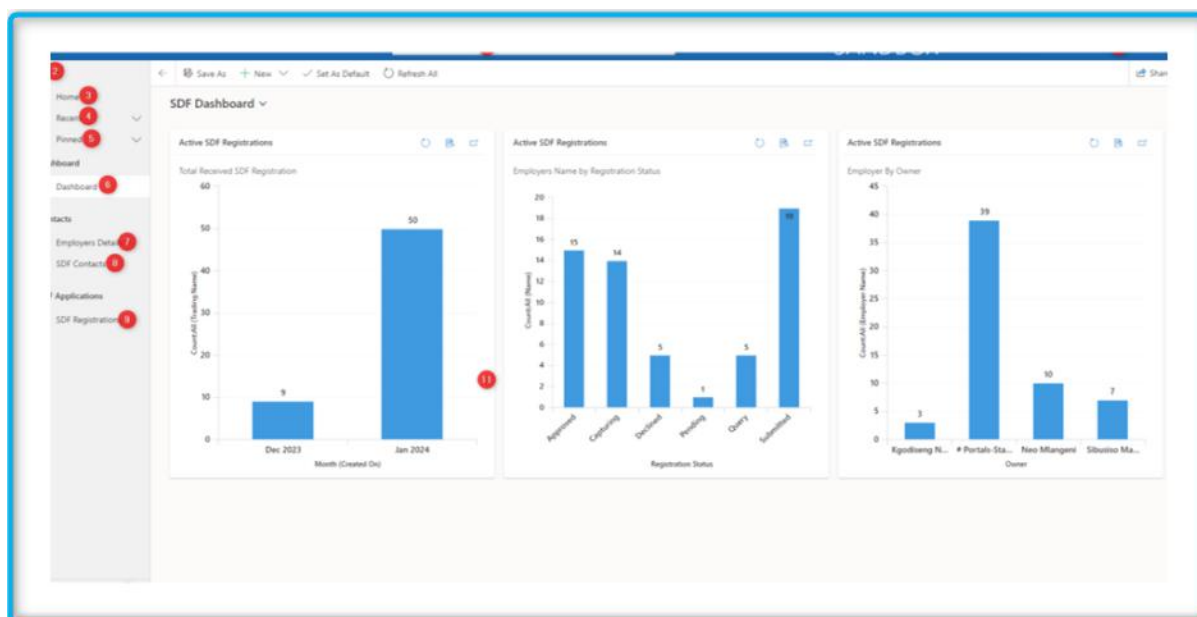


- Sector Skills Plan (SSP) Research

## 2 NAVIGATION

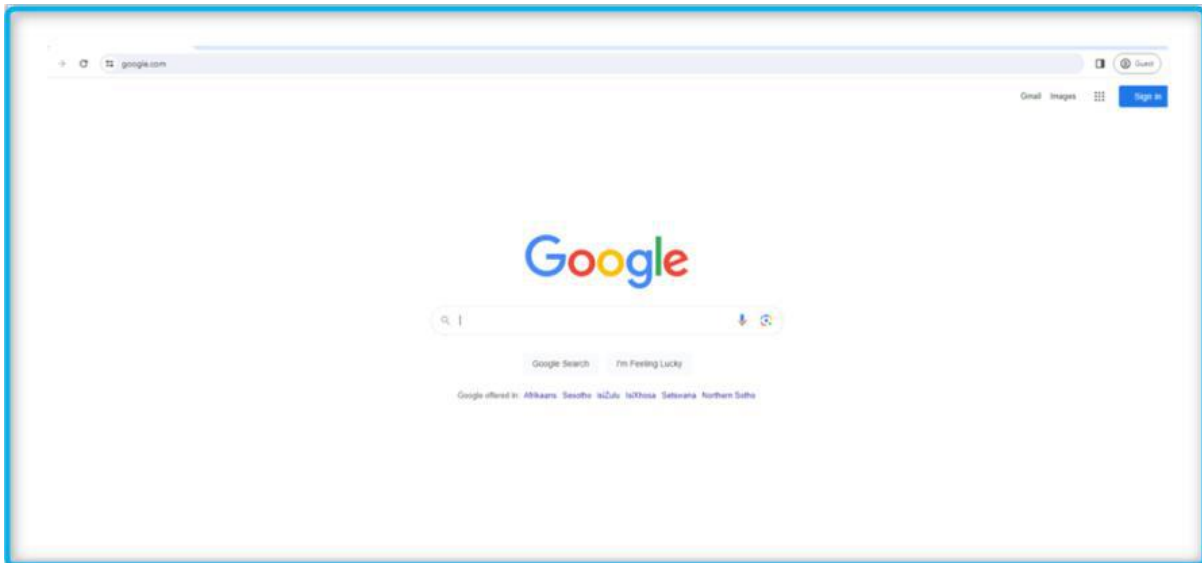


Apps provide a collection of functionalities for accomplishing a specific class of activity, such as managing your accounts and contacts. Click on the Employer management App.

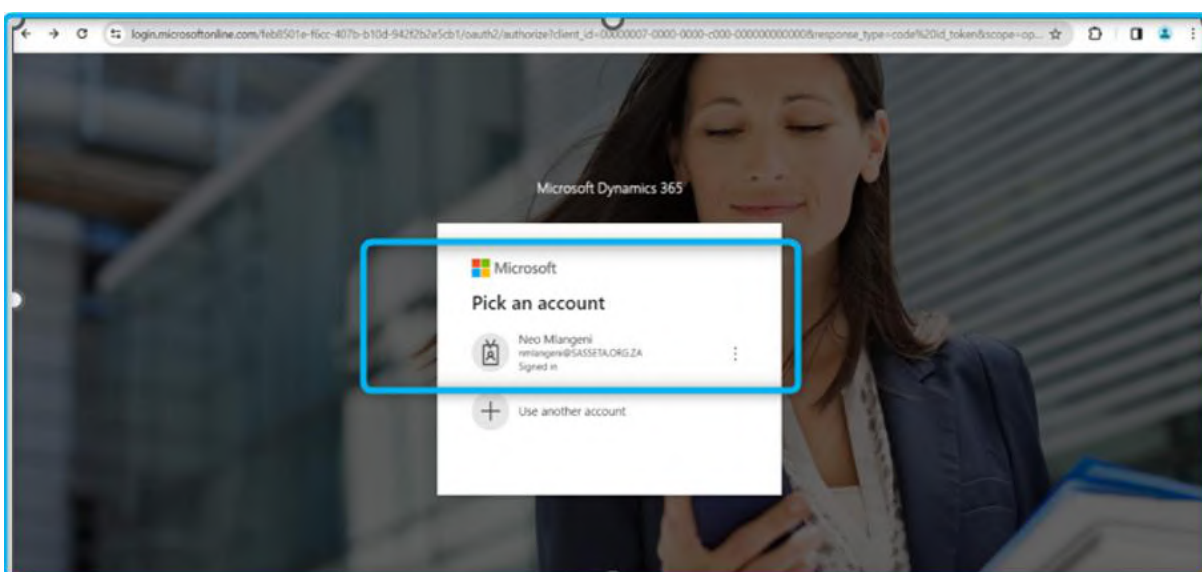


1. **App Launcher:** The App launcher makes opening and switching between your apps easy by highlighting your recently used apps and providing quick access to your recent online Office documents.
2. **Collapse/expand button:** Select this to collapse the navigator to allow more room for the main part of the page. If the navigator is already collapsed, select this button to expand it again.
3. **Home**
4. **Recent records:** Expand this entry to view a list of records you were recently using. Select a record here to open it. Select the push-pin icon next to a record listed here to added to your favourites (pinned records).
5. **Favourite records:** Expand this entry to view and open your favourite (pinned) records. Use the **Recent records** list to add records here. Select the remove-pin icon next to a record listed here to remove it from this list.
6. Dashboard
7. Employer Details – Organisations information
8. SDF Contact -SDP information
9. SDF Registrations – applications request
10. Bottom Navigation - Work-area selector: Open this menu to move to another work area. The current work area is named here.
11. Working area
12. Search
13. Settings
14. Login user Provider
15. Share

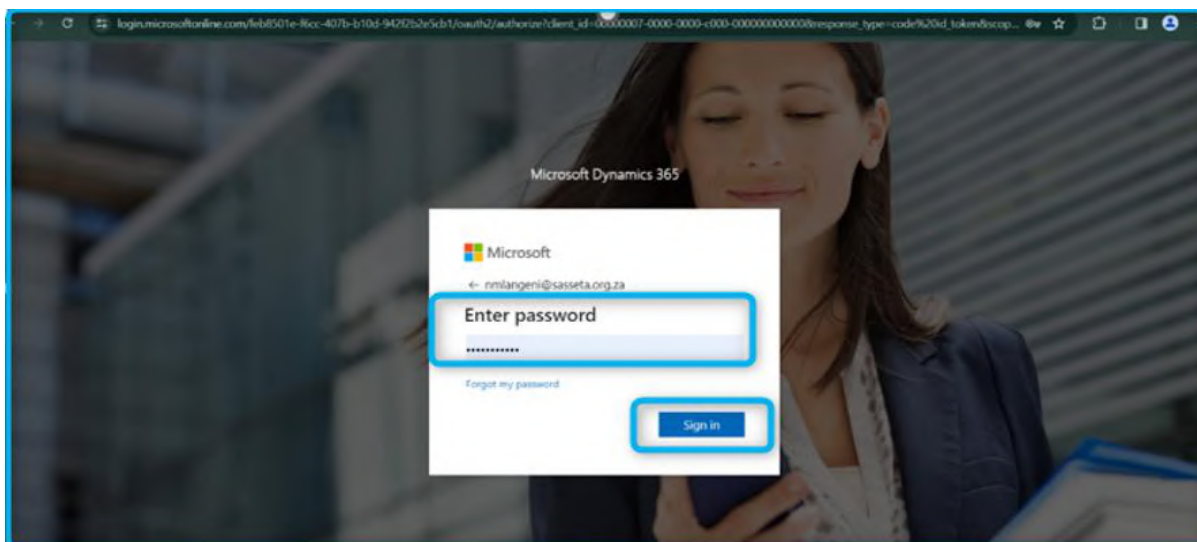
### 3 LOGIN



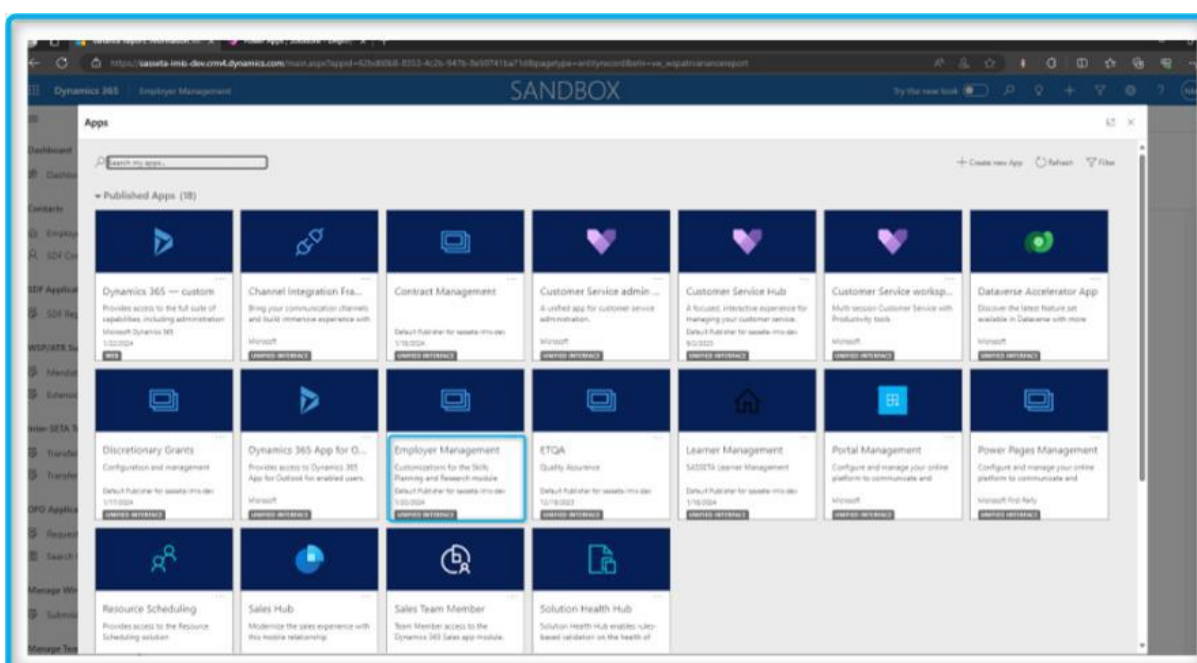
Step	Action
1.	<p>Launch the internal system:</p> <ul style="list-style-type: none"> <li>• Open any browser of your choosing.</li> <li>• Insert the following URL into your browser:</li> <li>• <a href="https://sasseta-imis-aut.crm4.dynamics.com/">https://sasseta-imis-aut.crm4.dynamics.com/</a></li> <li>• Click enter.</li> </ul>



Step	Action
2.	<p>You will be prompted to sign in with your SASSETA account.</p> <ul style="list-style-type: none"> <li>Click the <b>e-mail</b> textbox.</li> <li>Type in your valid e-mail address</li> <li>Press enter</li> </ul>

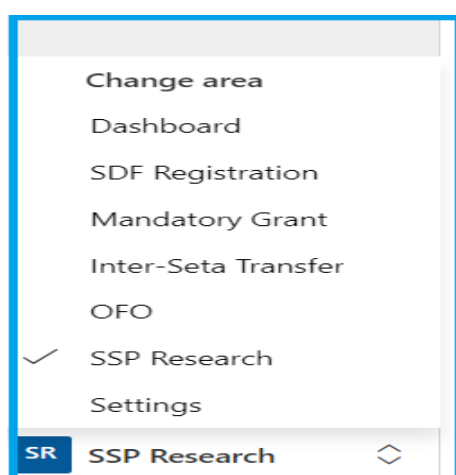


Step	Action
3.	<ul style="list-style-type: none"> <li>Click the <b>Password</b> textbox.</li> <li>Type in your password.</li> <li>Click the <b>Sign in</b> button.</li> </ul>



Step	Action
4.	<p>Application Is Running: Note that the respective application icon appears in the browser tab if the application is running.</p> <ul style="list-style-type: none"> <li>• Click the <b>Employer Management</b> app.</li> <li>• The Employer Management form will be opened.</li> </ul>

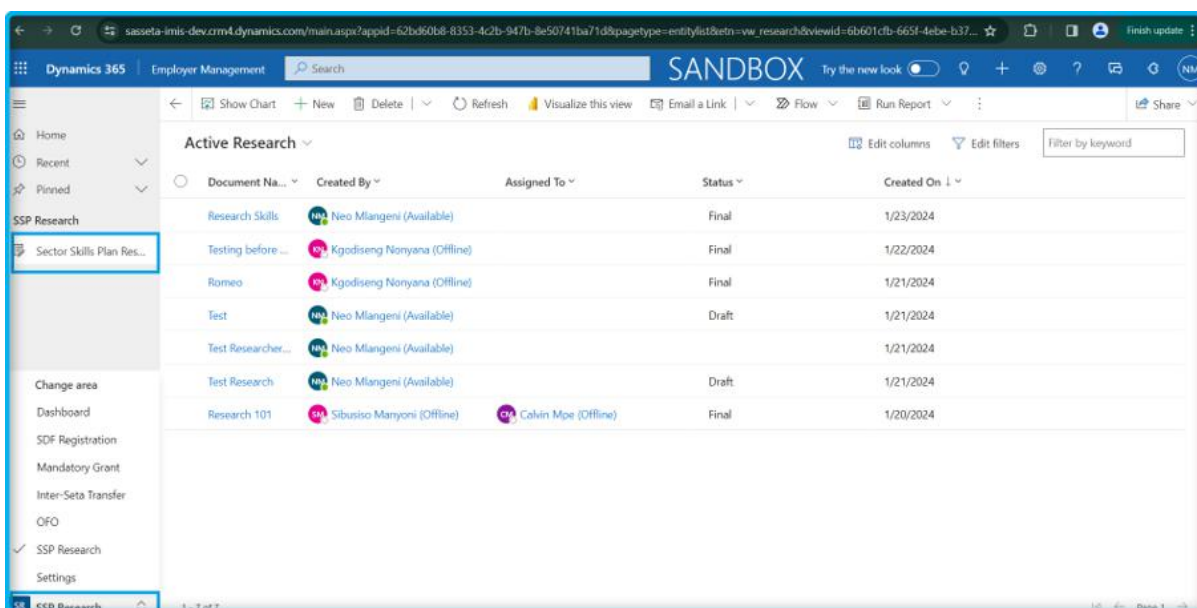
## 4 NAVIGATION MENU



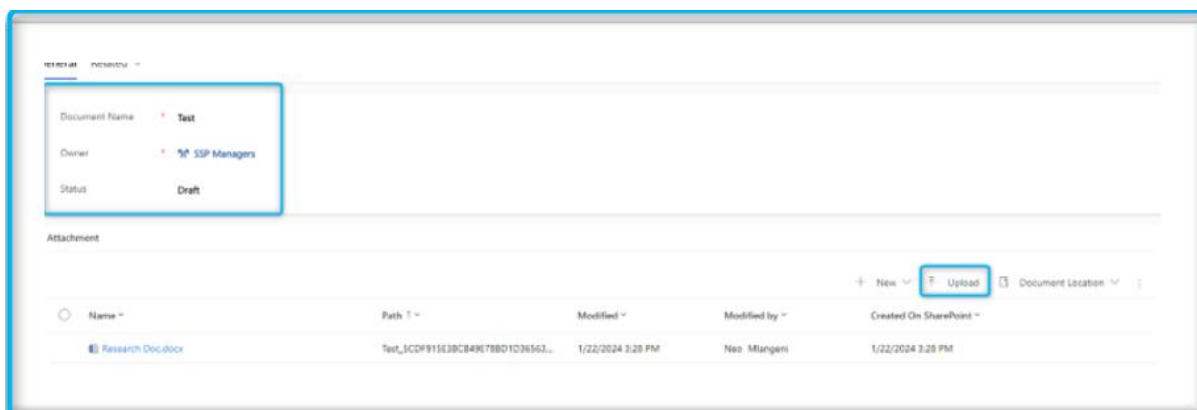
Step	Action
1.	<ul style="list-style-type: none"> <li>• The image above displays the navigation bar or menu.</li> <li>• Users can utilize the menu bar to navigate through the various sections of the module.</li> <li>• It's important to note that when a heading from the menu bar is selected, it will display the sub-headings of the sections, facilitating easy navigation.</li> </ul>

## 5 SECTOR SKILLS PLAN RESEARCH

### 5.1.1 UPLOADING THE RESEARCH DOCUMENT

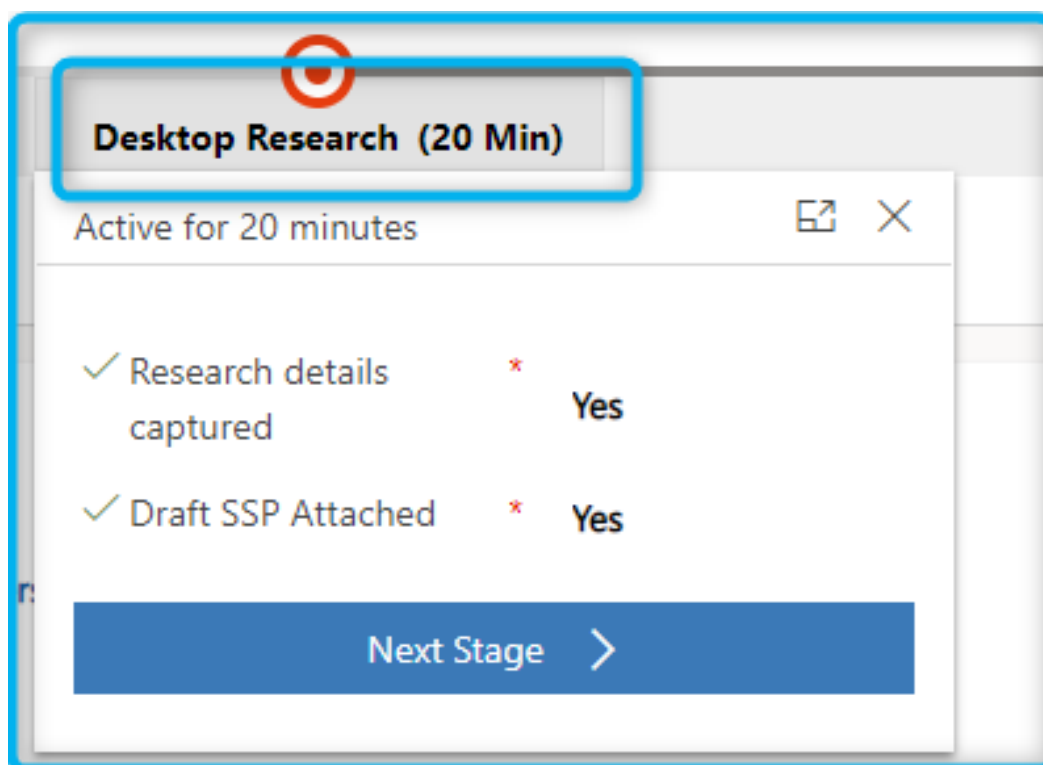


Step	Action
1.	<ul style="list-style-type: none"> <li>Click on the <b>Sector Skills Planning Research</b> side navigation bar on the menu bar.</li> <li>Active Research view will be displayed as shown above.</li> </ul>

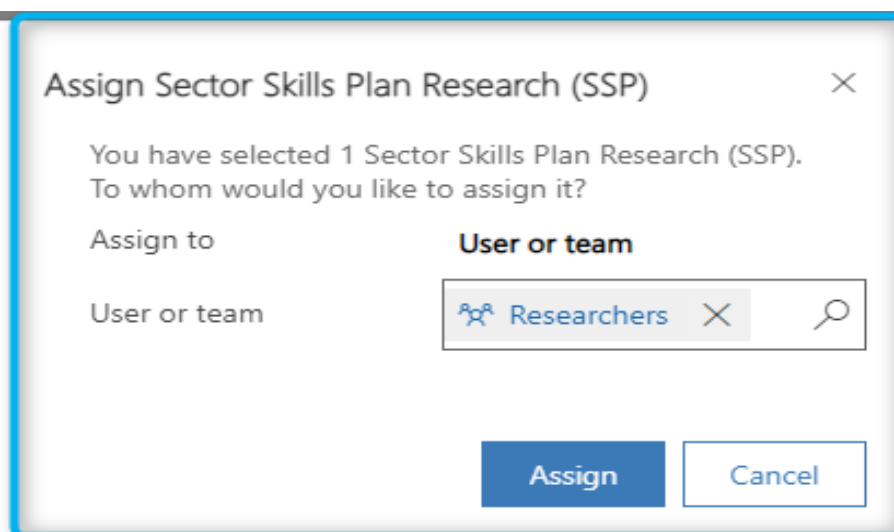


Step	Action
2.	<ul style="list-style-type: none"> <li>Fill in the details and click save.</li> <li>Click the <b>Upload</b> button to upload a document.</li> </ul> <p><b>Note:</b> Multiple researchers can collaborate on a single document simultaneously.</p>

5.1.2 PROCESSING THE RESEARCH DOCUMENT



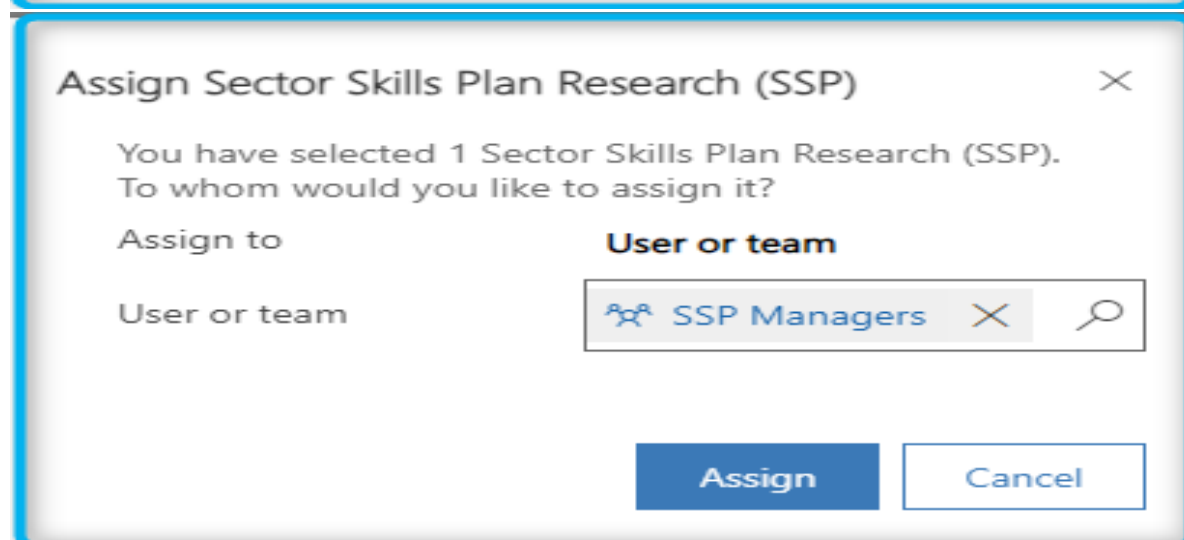
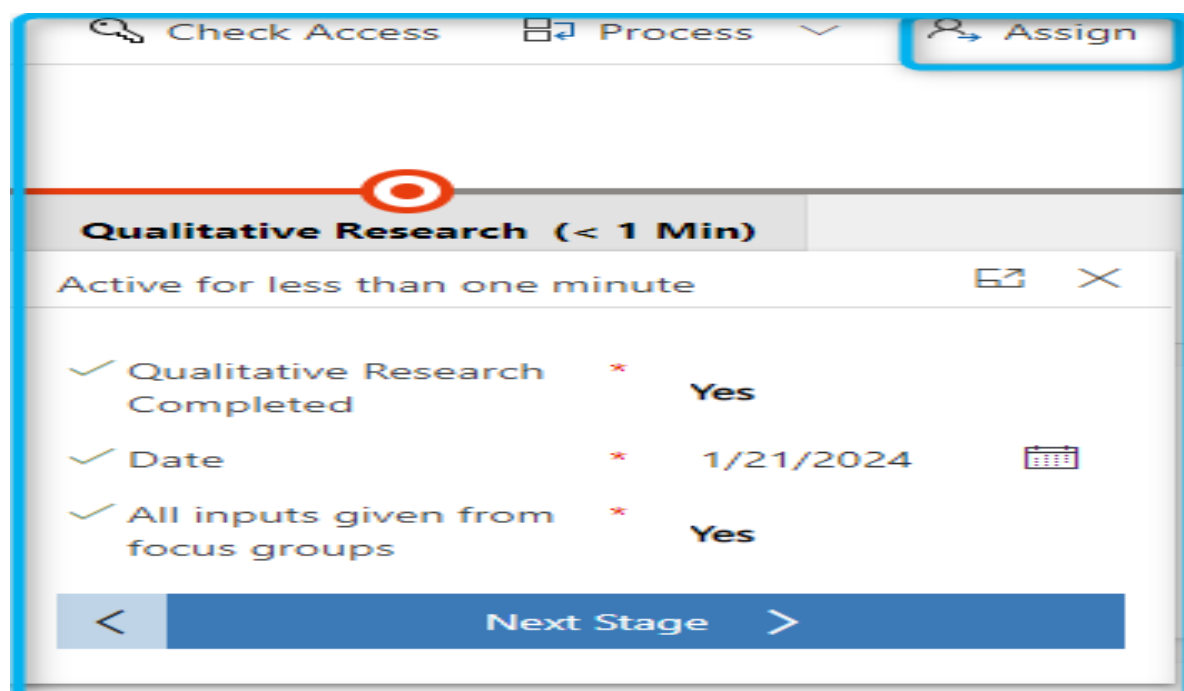
Step	Action
1	<p>Below is a business process flow which is used for Processing the Sector Skills Planning Research Document.</p> <ul style="list-style-type: none"> <li>• Click on the <b>Desktop Research</b> on the process flow to start processing the application.</li> <li>• Click on the <b>Research details captured</b> and select yes.</li> <li>• Click on the <b>Draft SSP Attached</b> and select yes.</li> </ul>



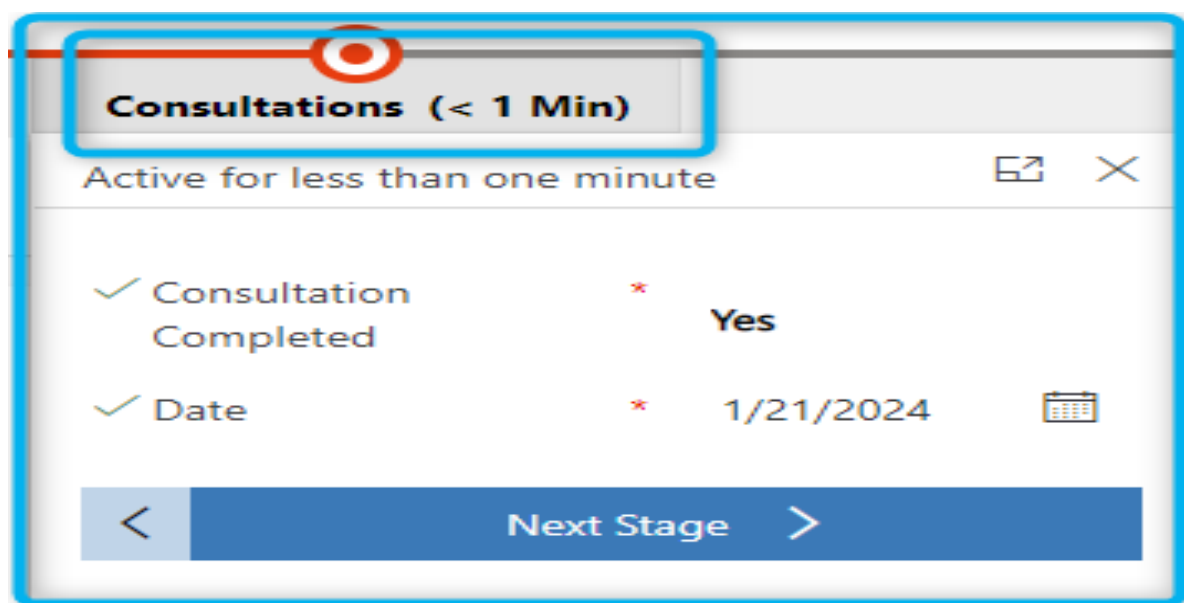
Step	Action
2	<ul style="list-style-type: none"> <li>• Click the <b>Assign button</b> to notify the team of researchers who need to review the document.</li> <li>• Select the <b>Assign to</b> textbox and select user or team.</li> <li>• Select the <b>User or team</b> textbox and select user or team.</li> </ul> <p><b>Note:</b> The assigned user or team will be notified, and this can be tracked on the timeline.</p>



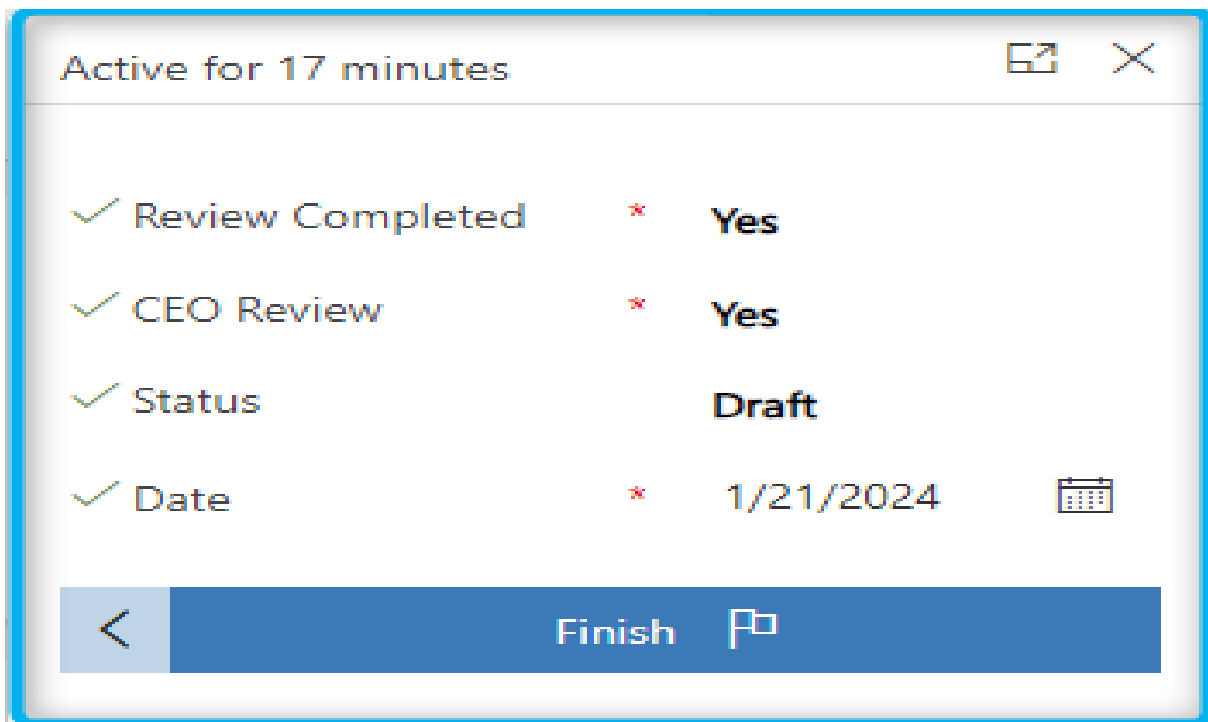
Step	Action
3.	<ul style="list-style-type: none"> <li>• Click on the <b>Qualitative Research Completed</b> and select yes.</li> <li>• Click on the <b>Date</b> and select the date.</li> <li>• Click on the <b>All inputs given from focus groups</b> and select yes.</li> </ul>



Step	Action
4.	<ul style="list-style-type: none"> <li>Click the <b>Assign button</b> to notify the team of managers who need to review the document.</li> <li>Select the <b>Assign to</b> textbox and select user or team.</li> <li>Select the <b>User or team</b> textbox and select user or team.</li> <li>Click <b>Next</b> to proceed to the Consultations Stage.</li> </ul> <p><b>Note:</b> The assigned user or team will be notified, and this can be tracked on the timeline.</p>



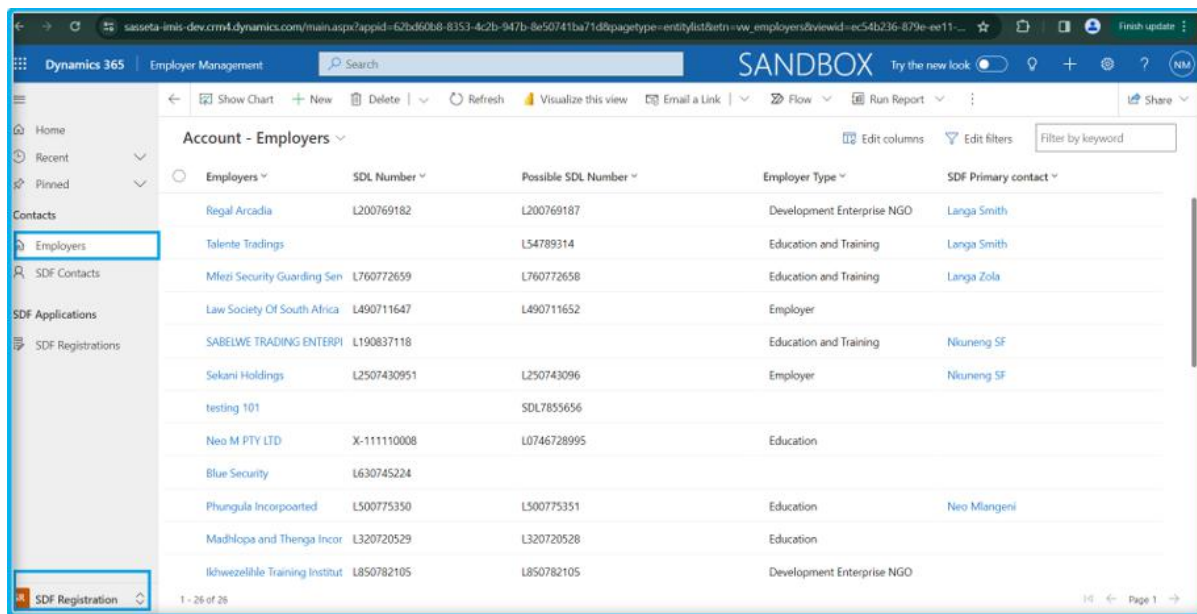
Step	Action
5.	<ul style="list-style-type: none"> <li>Click on the <b>Consultation Completed</b> and select yes.</li> <li>Click on the <b>Date</b> select the date.</li> <li>Click <b>Next</b> to proceed to the Review stage.</li> </ul>



Step	Action
6.	<ul style="list-style-type: none"> <li>• Click the <b>Review Completed</b> and select Yes.</li> <li>• Click on the <b>CEO Review</b> and select yes.</li> <li>• Click on <b>status</b> and select the status.</li> <li>• Click on Date and select the Date.</li> <li>• Click <b>Finish</b> to proceed to complete the process.</li> </ul>

## 6 CONTACT INFORMATION

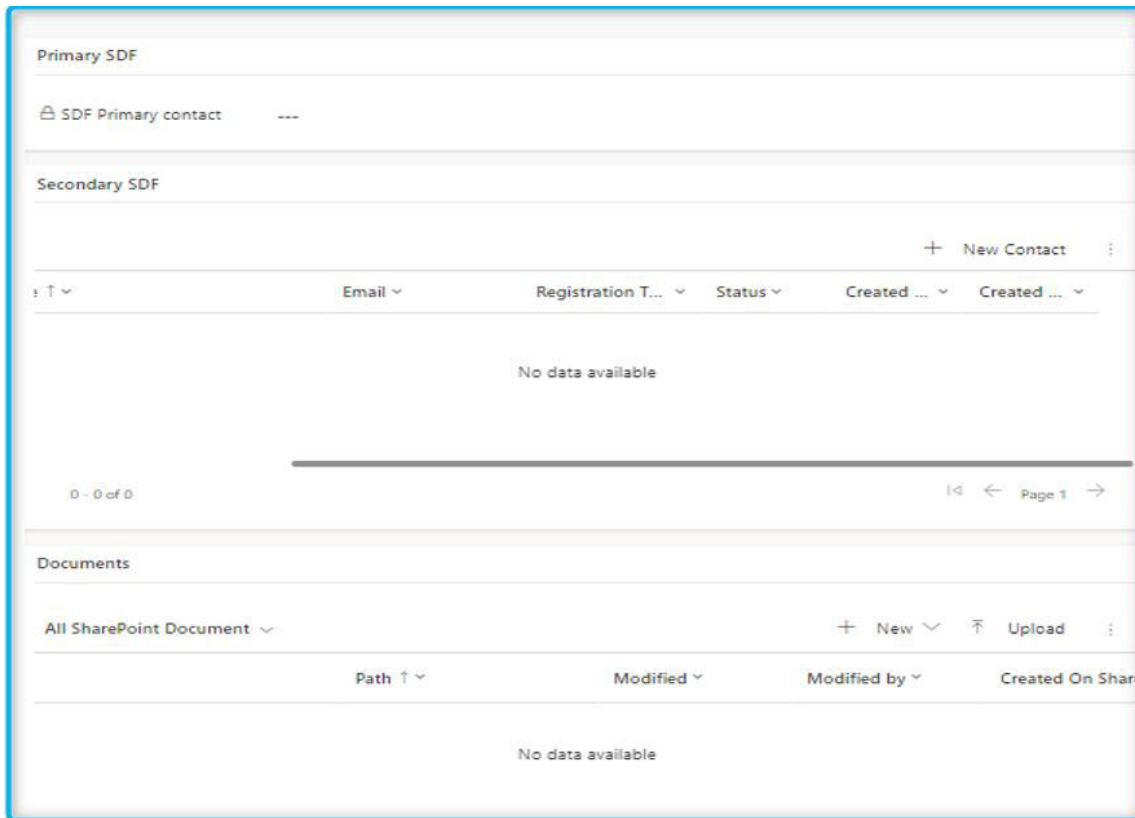
### 6.1.1 EMPLOYER DETAILS



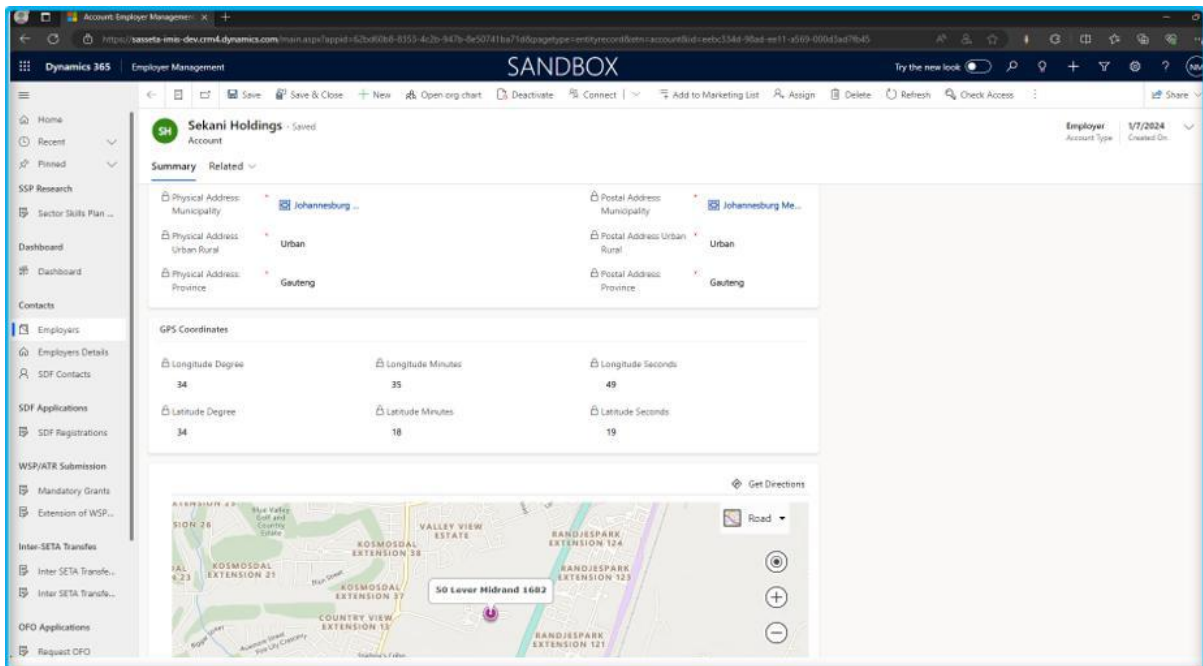
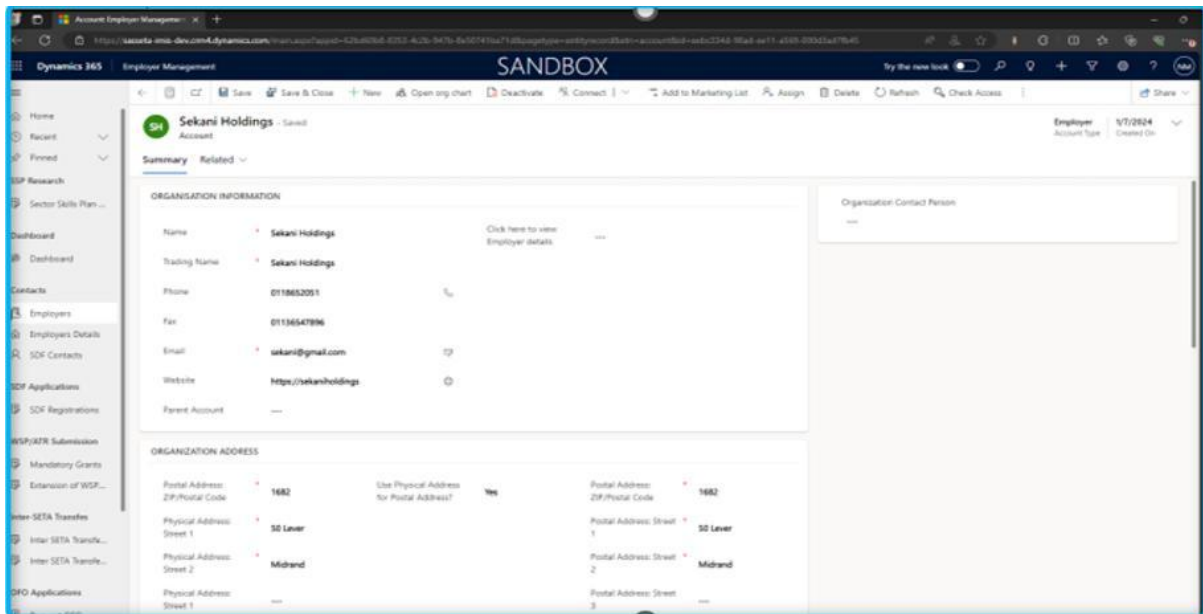
Step	Action
1.	<p>SASSETA Receives employer list from SARS Monthly Administrator loads the list of the system.</p> <ul style="list-style-type: none"> <li>Click on the <b>SDF registration</b> on the menu bar and all the headings and the sub-headings will display.</li> <li>Click the <b>Employers</b> side navigation bar under contacts.</li> <li>Employers view will be displayed.</li> </ul>

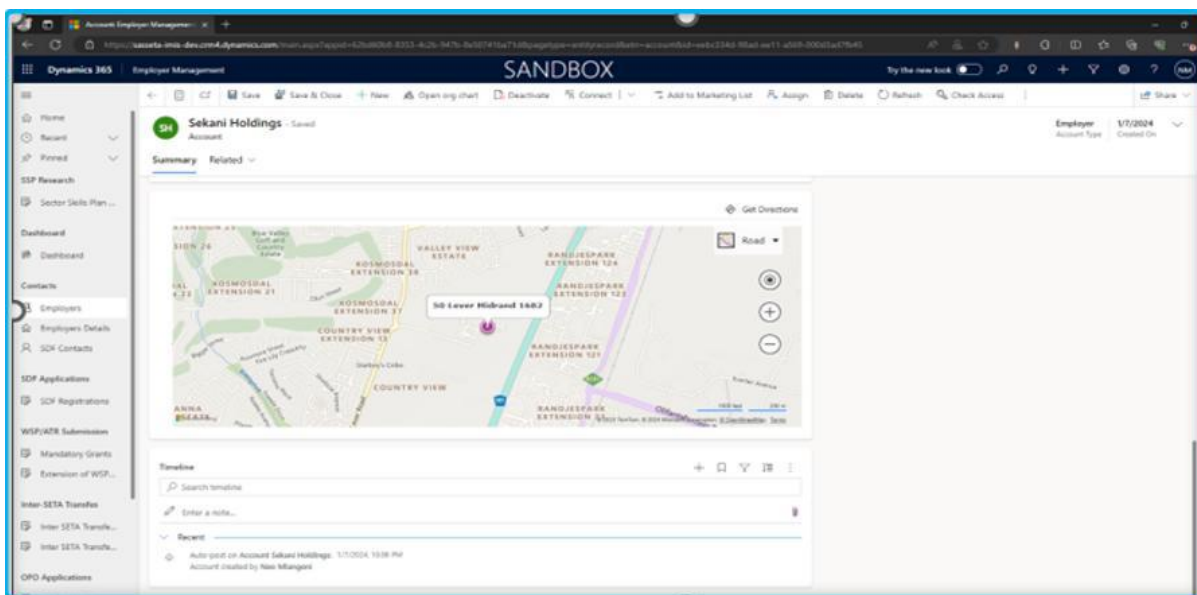
Organization Information		CFO Details	
Employer	Mfezi Security Guarding Services Cc	First Name	Mfezi
Levy Type	Levy Paying	Surname	Mzizi
SDL Number	L760772659	Cellphone Number	0128493379
Possible SDL Number	L760772658	Email	mzizi@gmail.com
Employer Type	Education and Training	Designation	COO
Number of Employees	52	Telephone number	0128493379
Organisation Registration Number Type	Other	Fax Number	0123659874
Organisation Registration Number	632542		
Levy Number	L760772659	Training Budget	
SARS Number	98745632741	Total Personnel Budget	R9,874,685,454
SIC Code	91104 - NIA NATIONAL INTELLIGENCE AGENCY	One Percent(3%) of the Personnel Training Budget	R4,785,145
Chambers	Legal Activities	Total Planned Training Budget	R5,874
Legal Status	Sole Proprietor	Additional Funding Planned	R25,874,126
Partnership	Parastatal		
Company/Organization Size	Large (150 or larger)		

Bank Details			
Account Holder	Sibusiso Dlamini		
Bank Name	ABSA Bank Limited		
Account Type	Current		
Account Number	1545454441544		
Branch Name	Springs		
Branch Code	2,522		
Confirm Banking Details	Yes		
Organisation Contact Details			
<a href="#">+ New Organisation Co...</a> <a href="#">+ Add Existing Organisa...</a>			
<input type="radio"/> First Name	<input type="text" value="Neoantle"/>	<input type="text" value="Morake"/>	<input type="text" value="neo@gmail.com"/>
			<input type="text" value="0118552051"/>
1 - 1 of 1 <span style="float: right;">Page 1</span>			
Organisation Training Committee			
<a href="#">+ New Organisation Trai...</a> <a href="#">Refresh</a> <a href="#">Flow</a>			
<input type="radio"/> First Name	<input type="text" value="Donna"/>	<input type="text" value="Pulson"/>	<input type="text" value="donna@gmail.com"/>
			<input type="text" value="06032145698"/>



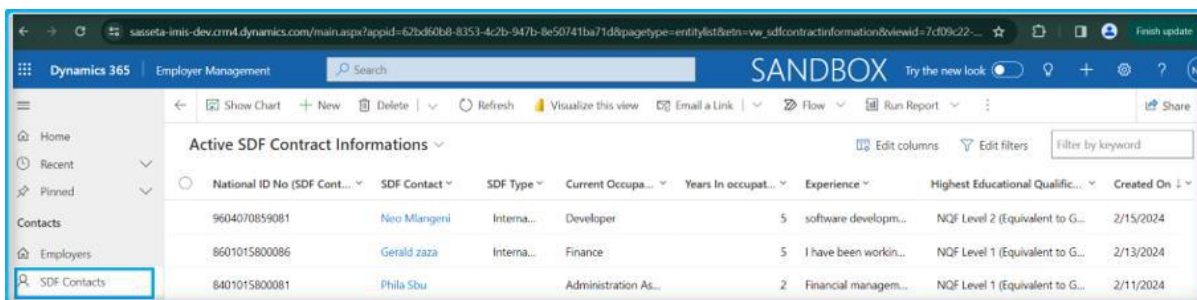
Step	Action
2.	<ul style="list-style-type: none"> <li>• Select any record and the employer details will be displayed.</li> <li>• The above image is how the record will be displayed.</li> </ul>



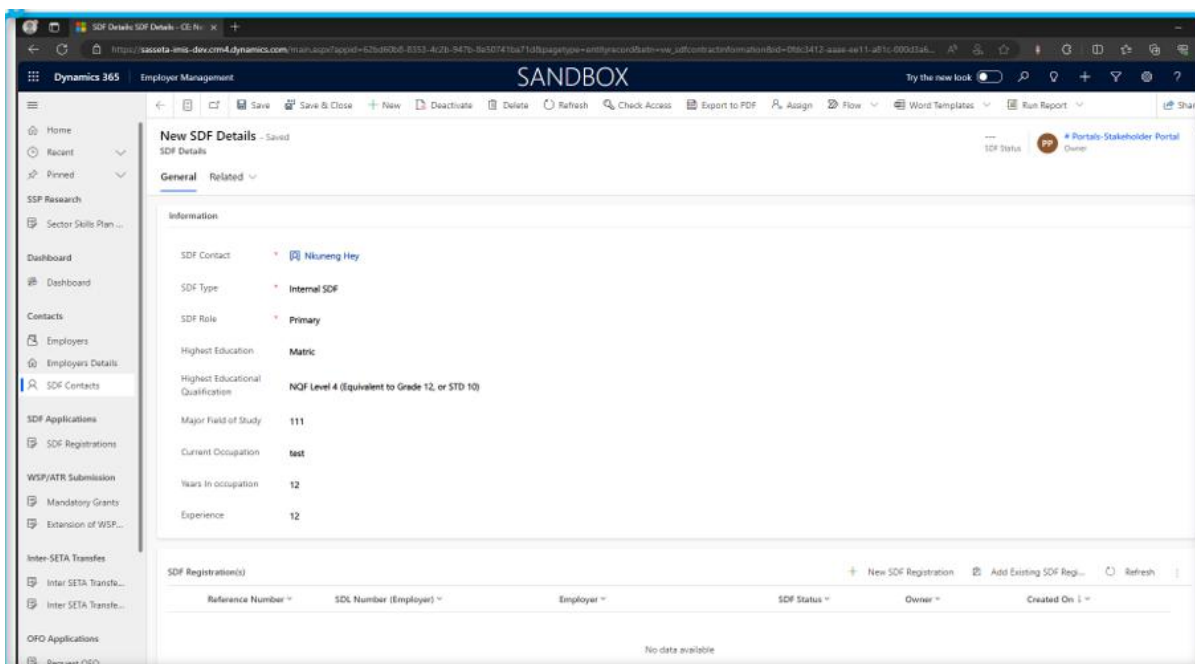


Step	Action
3.	<ul style="list-style-type: none"> <li>The account form will be integrated with the system the system.</li> </ul> <p><b>Note:</b> Fields with a lock-like key are automatically populated</p> <ul style="list-style-type: none"> <li>This is how a form will be displayed once integrated with the system.</li> </ul>

### 6.1.2 SDF CONTACT



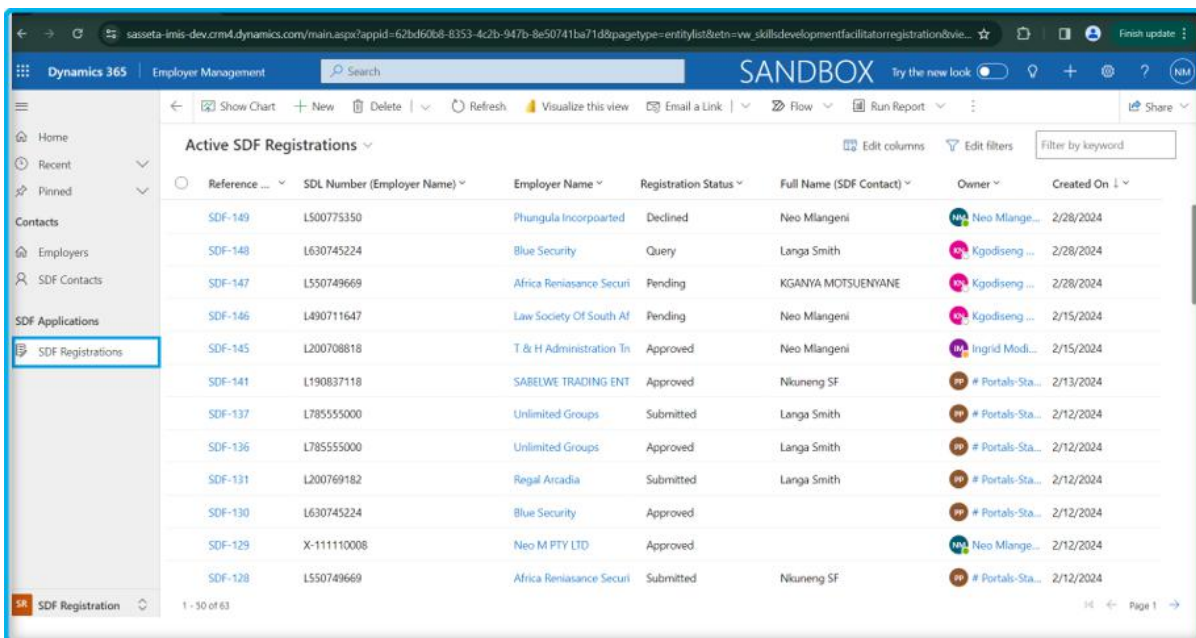
Step	Action
1	<ul style="list-style-type: none"> <li>Click <b>SDF Contacts</b> side navigation bar.</li> <li>The SDF Contact information view will be displayed.</li> </ul> <p><b>Note:</b> These are contacts that will be generated from the portal when an SDF applies to become an SDF.</p>



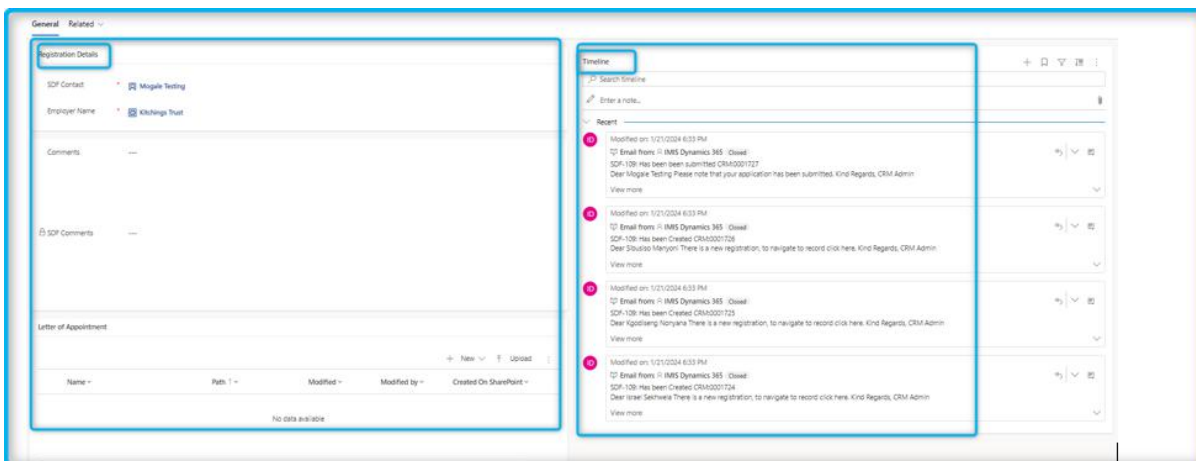
Step	Action
2.	<ul style="list-style-type: none"> <li>• Click on any of the records.</li> <li>• The information populated from the portal form will be displayed.</li> <li>• The above image is how a form will be displayed once filled in from the portal.</li> </ul>

## 7 SDF REGISTRATIONS

### 7.1.1 SDF REGISTRATION



Step	Action
1.	<ul style="list-style-type: none"> <li>Click <b>SDF Registrations</b> side navigation bar.</li> <li>The SDF Registrations view will be displayed.</li> </ul>



Step	Action
2.	<ul style="list-style-type: none"> <li>Click on one of the SDF registrations to open it.</li> <li>Displayed image above is what the SDF registration information will look like. This information is populated from the portal.</li> </ul> <p><b>Note:</b> On the right is a timeline that keeps tracks of all the notifications.</p>



7.1.2 PROCESSING THE REGISTRATION DOCUMENT

**For office use only**

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Evaluation complete Yes

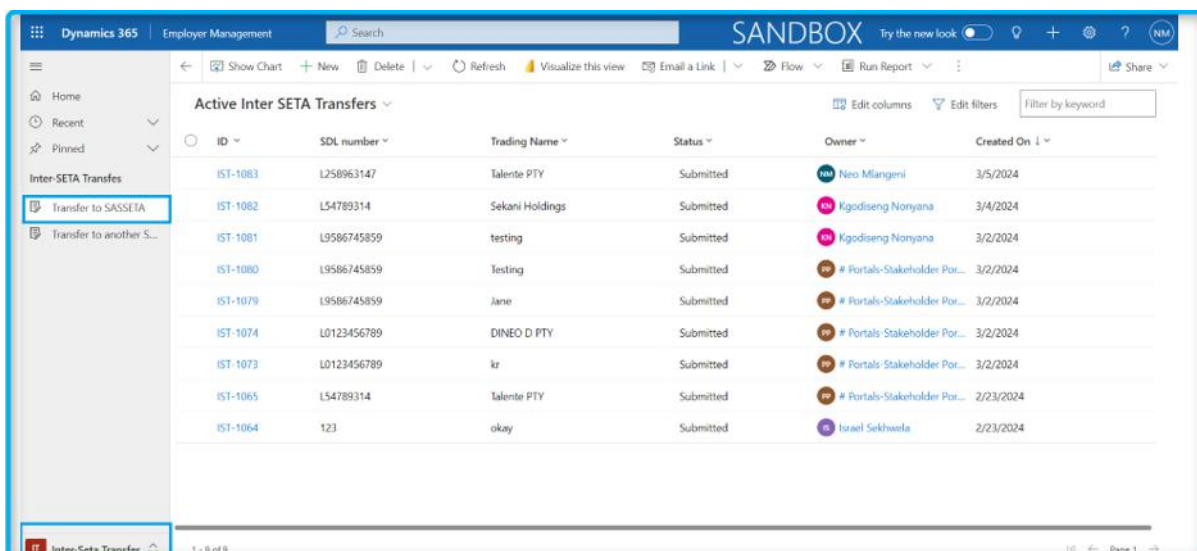
Registration Status **Approved**

 Status Date 3/6/2024 

Step	Action
1.	<p>Below is a business process flow which is used for accepting or declining SDF Registrations.</p> <p>NB: As an Owner (you are automatically assigned to the record when you start working on it)</p> <ul style="list-style-type: none"> <li>Click on the textbox next to <b>Evaluation Complete</b> and select Yes once you've verified the information on the SDF registration.</li> <li>Click on the textbox next to <b>Registration Status</b> and select the registration status.</li> <li>The date will be automatically locked once an Administrator selects the registration status.</li> <li>The date will be displayed as ddmmyyyy.</li> </ul> <p><b>Note:</b> All e-mails going out and in is tracked on the timeline</p>

## 8 INTER- SETA TRANSFERS

### 8.1.1 TRANSFER TO SASSETA



Step	Action
1.	<ul style="list-style-type: none"> <li>Click the <b>Transfer to SASSETA</b> side navigation bar under Inter-SETA transfers.</li> <li>Active Inter SETA Transfers view will be displayed as shown above.</li> </ul>

**Employer's Details**

Trading Name	Talente PTY	Create Temporary SDL?	<input type="text" value="Yes"/>
Core business of the company/legal entity	Talente PTY		
SDL number	L258963147		
SIC Code	JUSTICE		
Contact Person	Neo Mlangeni		
Telephone number	0126587496		
Email Address	talente@gmail.com		

SDF Feedback

SDF Comments ---

Please attach company profile and motivational letter

+ New Upload

Name	Path	Modified	Modified by	Created On SharePoint
ID Copy.pdf	IST-1035_8BC1EACC82B7EE1...	1/20/2024 12:59 PM	SharePoint App	1/20/2024 12:59 PM
Qualifications.pdf	IST-1035_8BC1EACC82B7EE1...	1/20/2024 12:59 PM	SharePoint App	1/20/2024 12:59 PM

Step	Action
2.	<ul style="list-style-type: none"> <li>Click on any of the records.</li> <li>This is how the information from the portal will be populated as shown above.</li> </ul>

8.1.2 PROCESSING OF THE INTER-SETA TRASNFRERS

Create Temporary SDL?

**Receive Request (21 Hrs)**

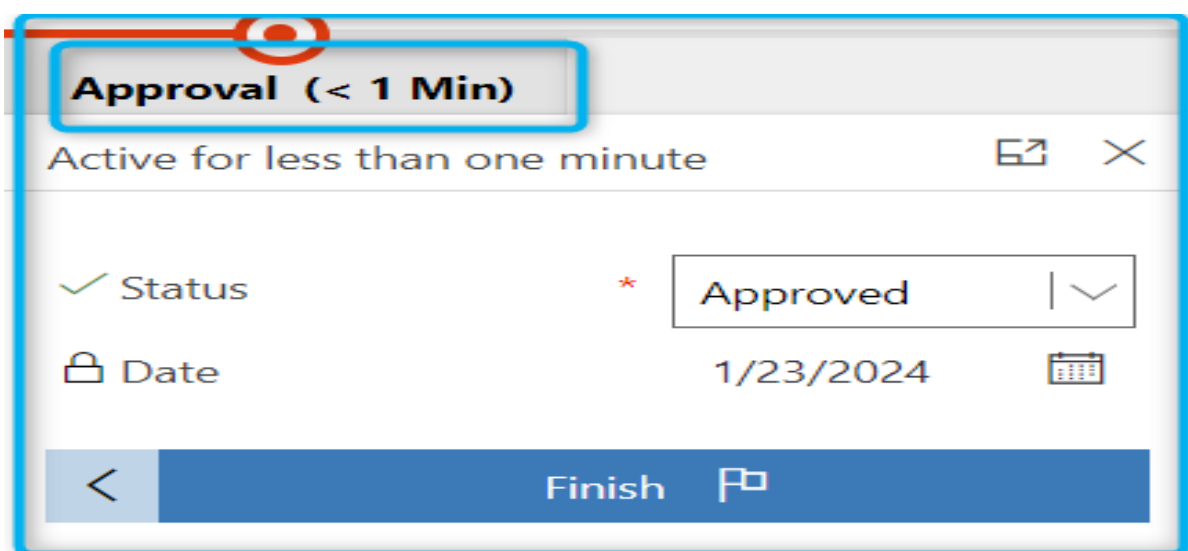
Active for 21 hours

✓ Received Date 3/5/2024

✓ Verified Application Yes

Next Stage >

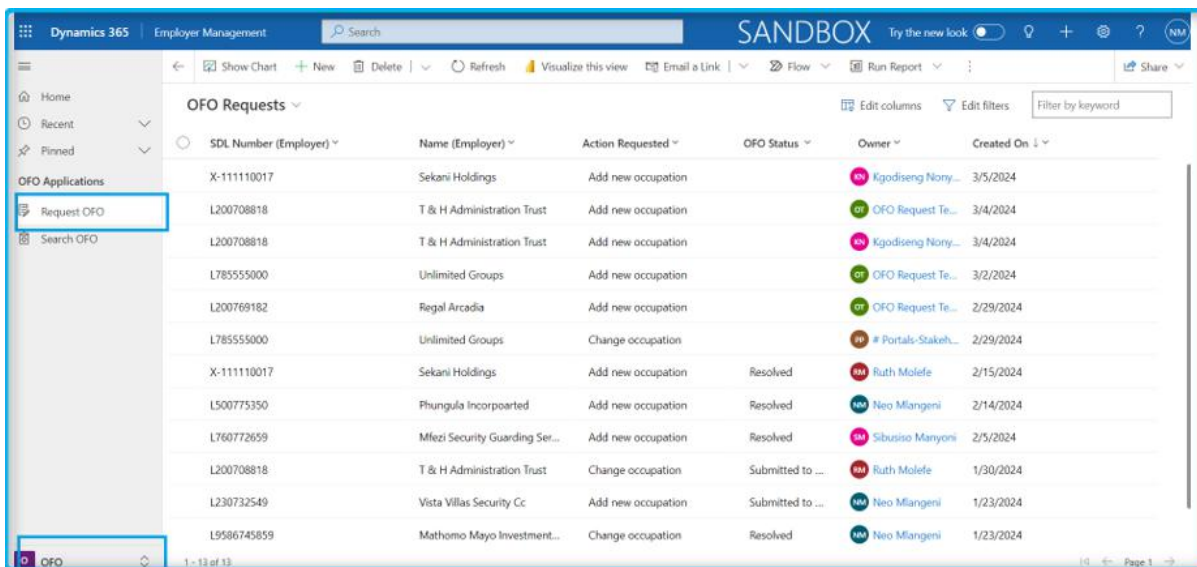
Step	Action
1	<p>Below is a business process flow which is used for approving the Inter SETA Transfer.</p> <ul style="list-style-type: none"> <li>Note that when you select yes on the <b>Create Temporary SDL number</b> this automatically creates an employer for the SDF to proceed with other functions on the web portal.</li> <li>Click on the <b>Receive Request</b> on the process flow to start processing the application.</li> <li>The <b>Received Date</b> is automatically locked since it's the day the application was received.</li> <li>Click on the textbox next to <b>Verified Application</b> and select yes.</li> <li>Click <b>Next</b> to proceed to the approval stage.</li> </ul> <p><b>Note:</b> Owner should automatically be populated.                      NB: The process is the same as the Transfer Out of SASSETA</p> <ul style="list-style-type: none"> <li>You cannot proceed to the next stage if application is set to 'No'.</li> </ul>



Step	Action
2.	<ul style="list-style-type: none"> <li>Click on Status and select the Status of the Transfer.</li> <li>Click the finish button to save the record.</li> </ul> <p><b>Note:</b> The date will be automatically locked after the status is selected.</p> <ul style="list-style-type: none"> <li>The timeline keeps track of all communication.</li> </ul>

## 9 REQUEST OFO

### 9.1.1 OFO REQUESTS



Step	Action
1.	<ul style="list-style-type: none"> <li>Click the <b>Request OFO</b> side navigation bar under OFO Applications</li> <li>OFO Requests view will be displayed as shown below.</li> </ul>

**Requesting User\***  
**Langa Sbu**

**Requesting Organisation\***  
**Madhlopa and Thenga Incorporated**

**Action Requested\***  
**Add new occupation**

**Job Title**  
**Developer**

**Occupation code to be moved, deleted or changed**  
 ---

**Unit Group Number to be removed or added**  
 ---

Name of occupation to be added or new title or where change in alternative titles is required  
---

Description of occupation to be added or changed  
**Creating Systems**

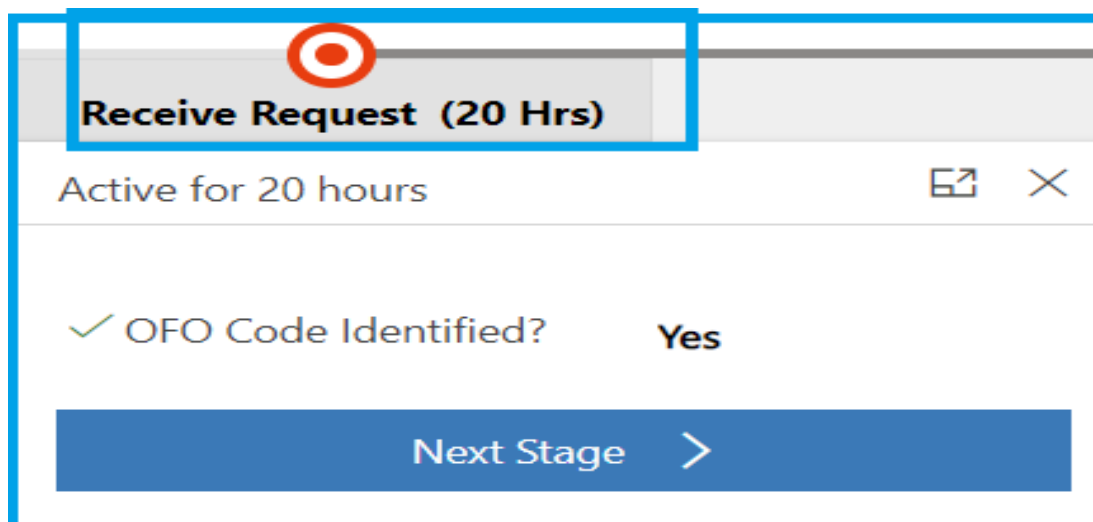
Specialisation  
**Software Development**

Alternative title  
**Coder**

Motivation  
**A unique developer**

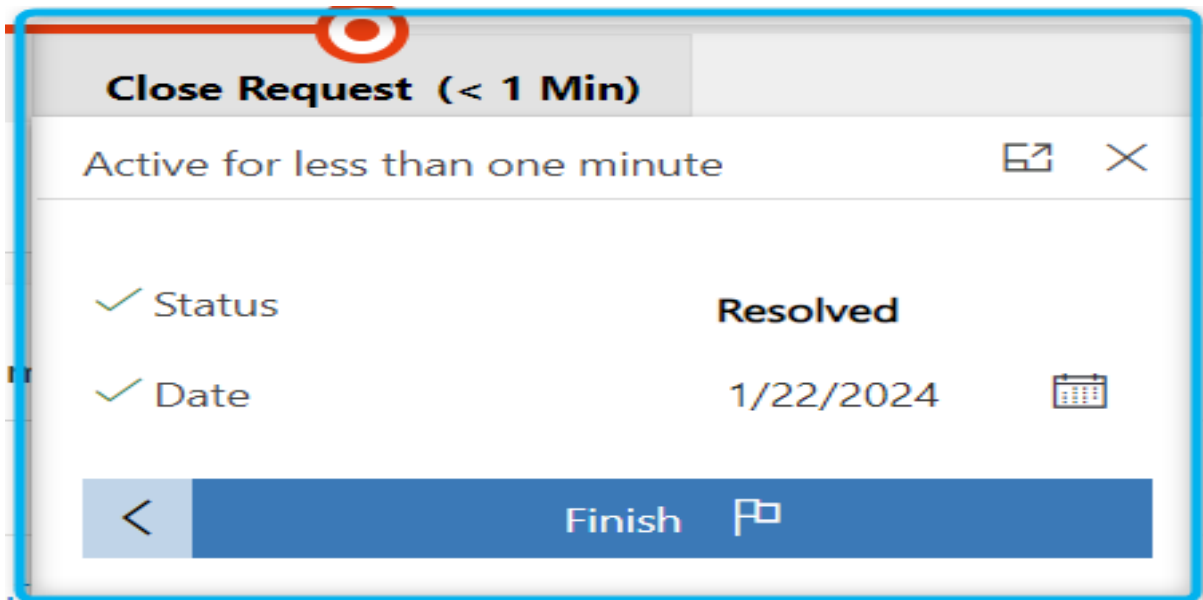
Step	Action
2.	<ul style="list-style-type: none"> <li>Click on any of the records to view the OFO request details.</li> <li>The OFO request from the portal will be displayed as shown below.</li> </ul>

### 9.1.2 PROCESSING OF OFO REQUESTS



Step	Action
1.	<p>Below is a business process flow which is used for approving the Inter SETA Transfer.</p> <ul style="list-style-type: none"> <li>Click on the <b>Receive Request</b> on the process flow to start processing the application.</li> <li>Click on the <b>OFO Code Identified</b> and select yes once you have identified the OFO code.</li> </ul>

	<ul style="list-style-type: none"> <li>Click <b>Next</b> to proceed to the Close Request stage.</li> </ul> <p><b>Note:</b> All communication will be tracked on the timeline and the owner will automatically be populated once an Administrator starts working on the record.</p>
--	--



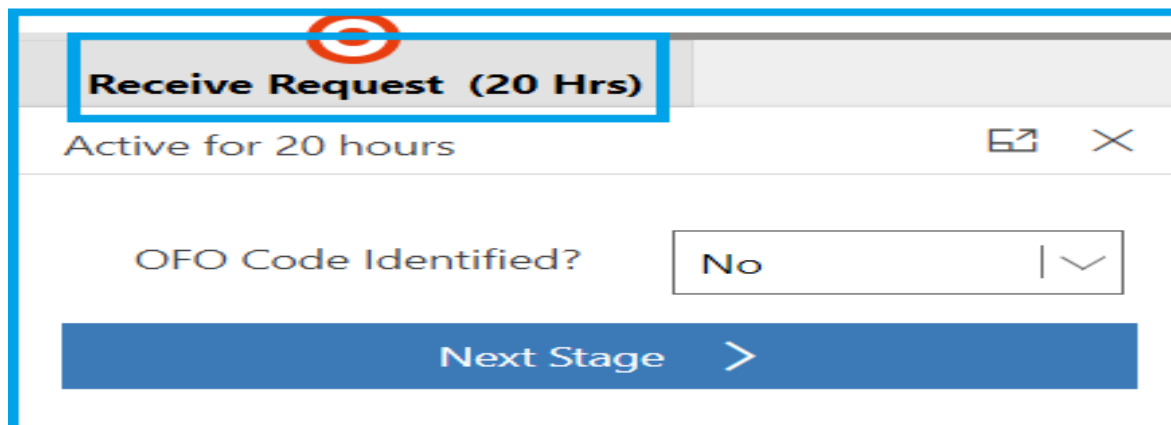
Step	Action
2.	<ul style="list-style-type: none"> <li>Click on the textbox next to <b>Status</b> and select your Status.</li> <li>Click finish to complete the request.</li> </ul> <p><b>Note:</b> The date will be automatically populated once the status is selected.</p>

### 9.1.3 SEARCH OFO

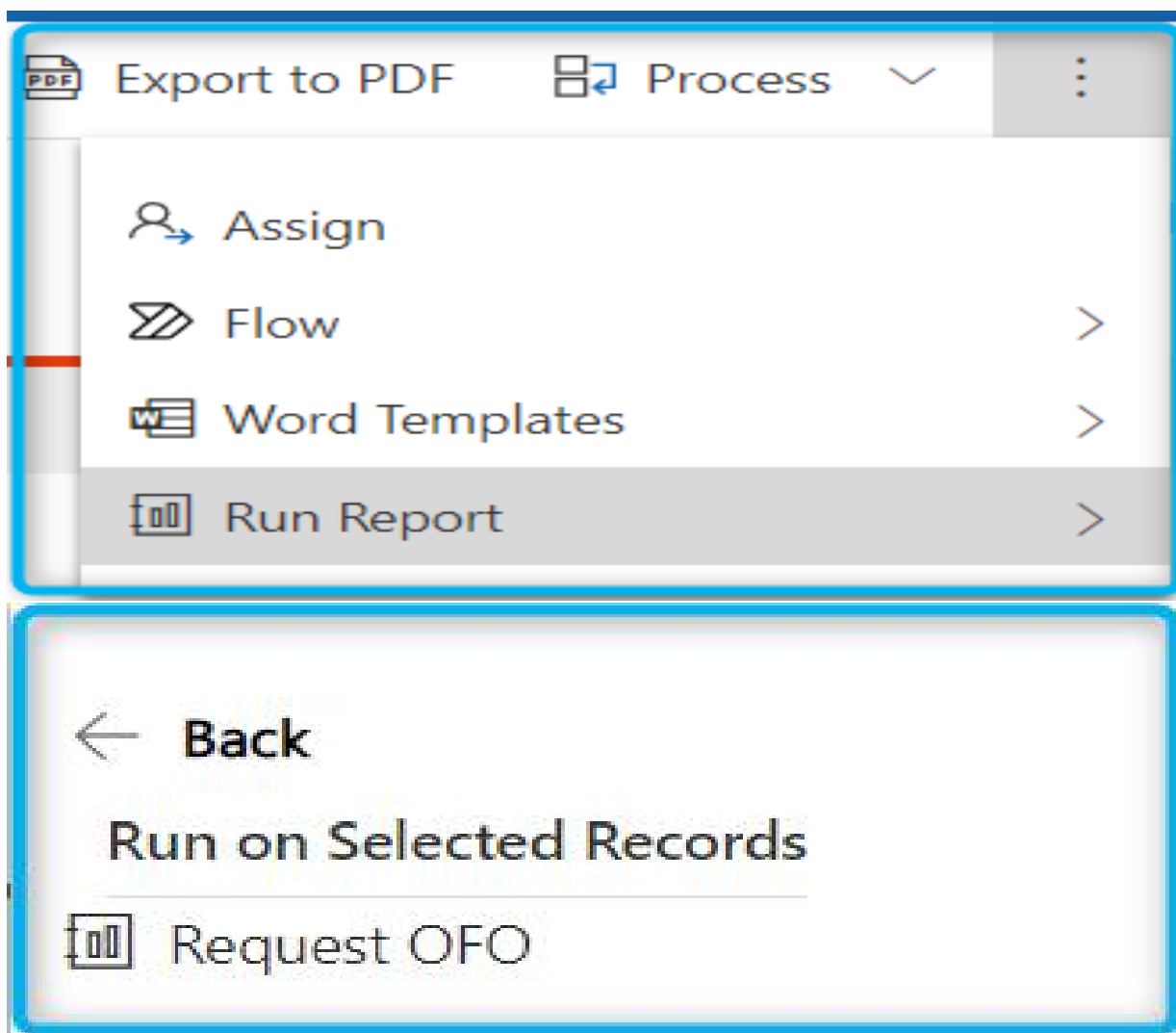
Code	Description
2021-1	MANAGERS
2021-2	PROFESSIONALS
2021-3	TECHNICIANS AND ASSOCIATE PROFESSIONALS
2021-4	CLERICAL SUPPORT WORKERS
2021-5	SERVICE AND SALES WORKERS
2021-6	SKILLED AGRICULTURAL, FORESTRY, FISHERY, CRAFT AND RELATED TRADES WORKERS
2021-7	PLANT AND MACHINE OPERATORS AND ASSEMBLERS
2021-8	ELEMENTARY OCCUPATIONS

Step	Action
1.	<ul style="list-style-type: none"> <li>Click the <b>Search OFO</b> side navigation bar under OFO Applications.</li> <li>You will be redirected to the list of OFO codes.</li> <li>Click on the search textbox to find codes for the SDF.</li> </ul>

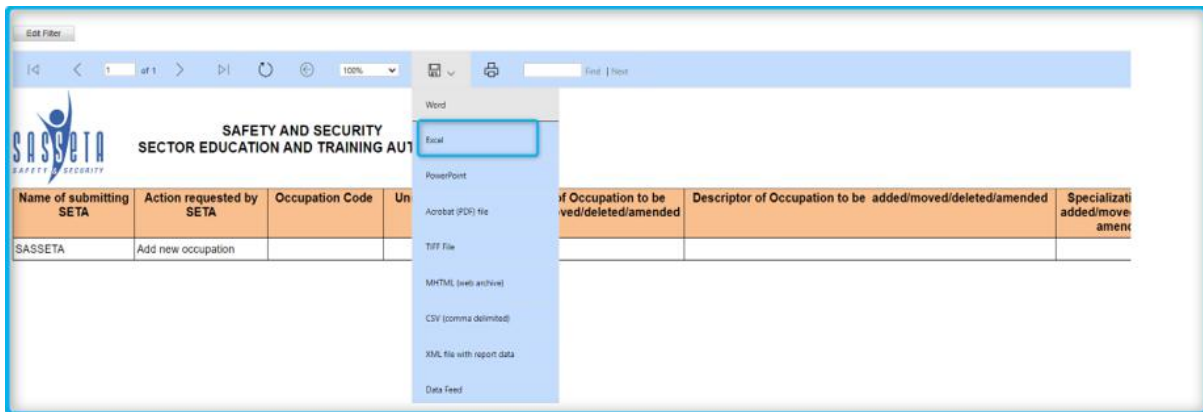
#### 9.1.4 PROCESS WHEN OFO IS NOT IDENTIFIED



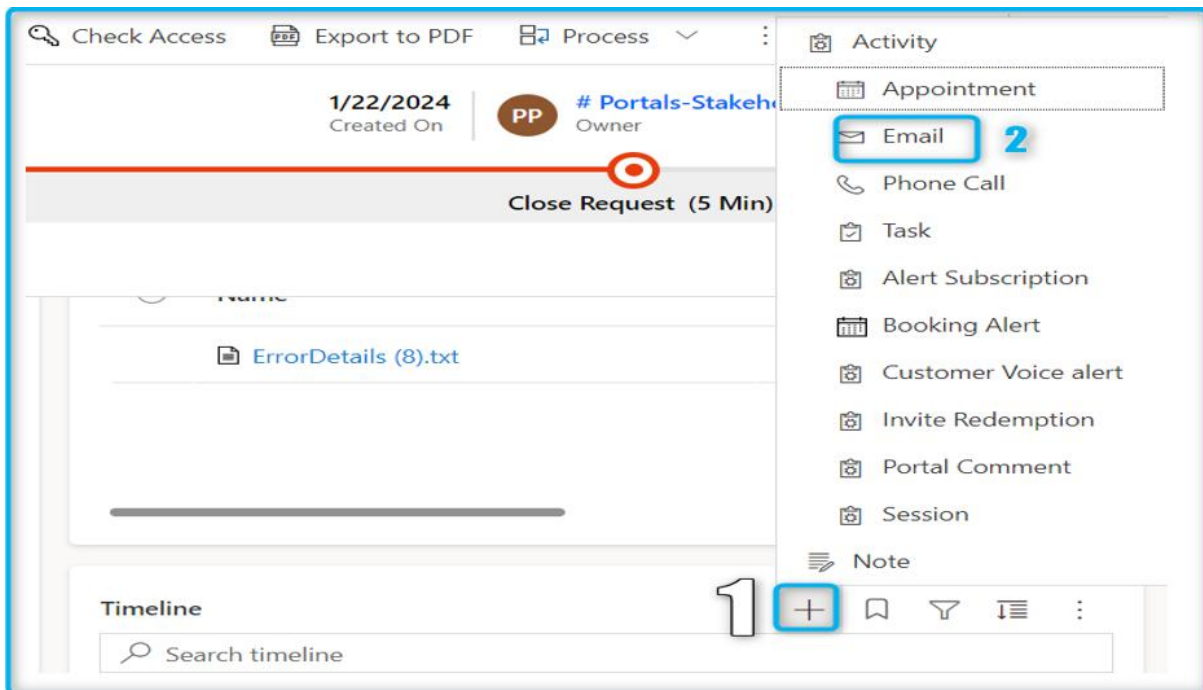
Step	Action
1.	<p>Below is a business process flow which is used for approving the Inter SETA Transfer.</p> <ul style="list-style-type: none"> <li>Click on the <b>Receive Request</b> on the process flow to start processing the application.</li> <li>Click on the <b>OFO Code Identified</b> and select no.</li> <li>Click <b>Next</b> to proceed to the Close Request stage.</li> </ul> <p><b>Note:</b> All communication will be tracked on the timeline.</p>



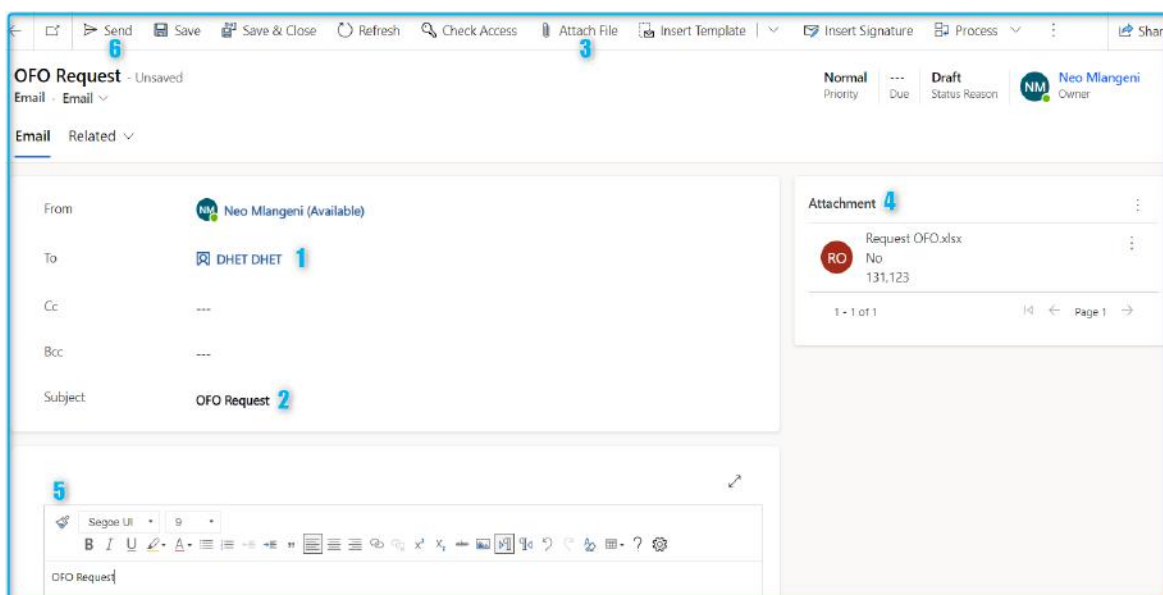
Step	Action
2	<ul style="list-style-type: none"> <li>• Click on the <b>Run Report</b> on the top right navigation bar.</li> <li>• Select the report and press enter.</li> <li>• Click on the textbox next to <b>Status</b> and select your Status.</li> </ul> <p><b>Note:</b> The date will be automatically populated once the status is selected.</p>



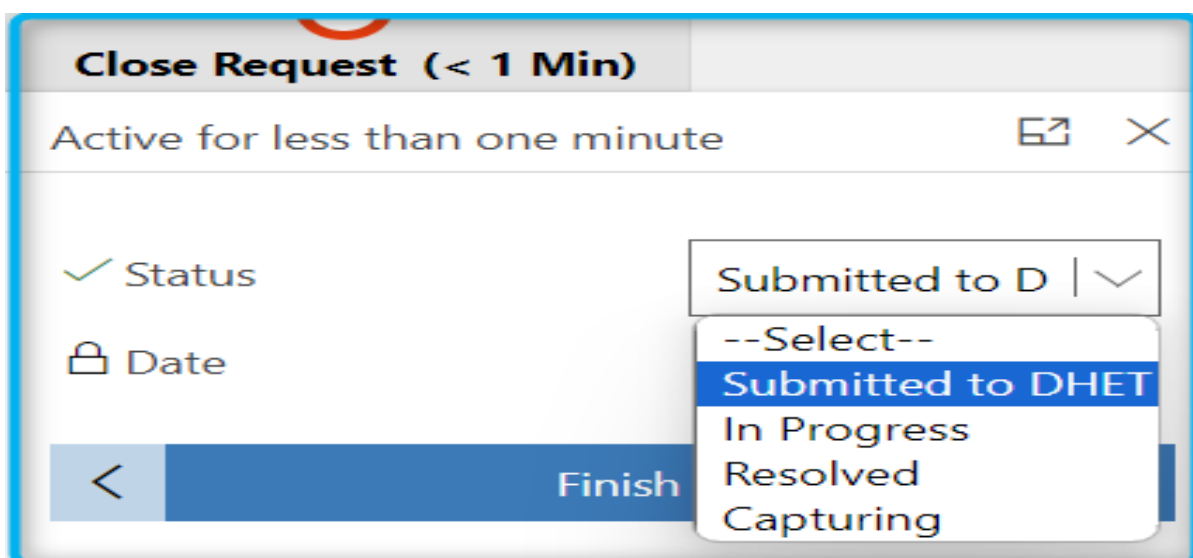
Step	Action
3	<ul style="list-style-type: none"> <li>Click on the <b>Save</b> button.</li> <li>Click Excel</li> <li>The request will be automatically downloaded on your machine.</li> </ul>



Step	Action
4	<ul style="list-style-type: none"> <li>Click on the + button from the e-mail header.</li> <li>Select Email</li> <li>The request will be automatically downloaded on your machine.</li> </ul>



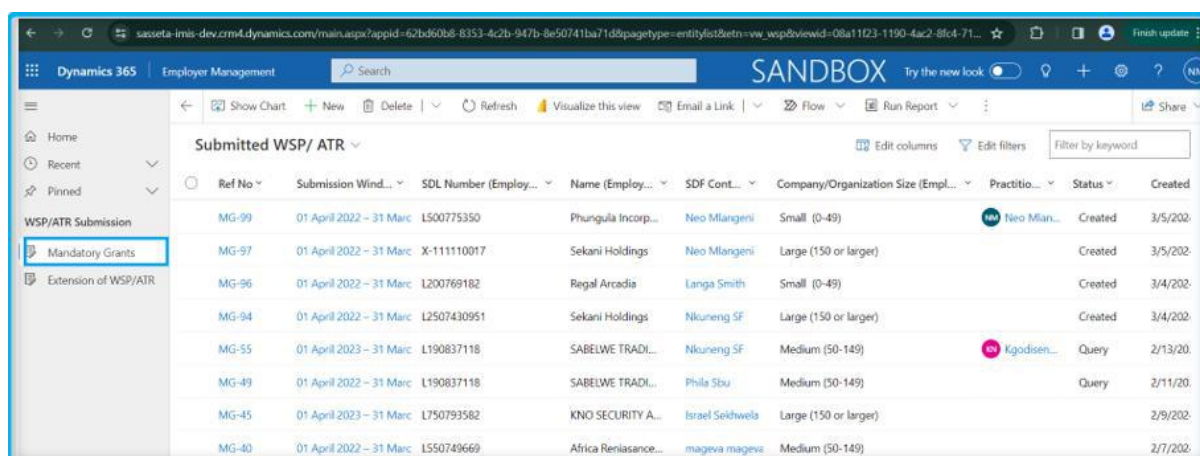
Step	Action
5	<ul style="list-style-type: none"> <li>• Select the DHET email.</li> <li>• Type in your subject</li> <li>• Click on <b>attach file</b> button.</li> <li>• Note that the attachment will be displayed under the attachment header.</li> <li>• Type in your description</li> <li>• Click the send button to send the e-mail</li> </ul>



Step	Action
6	<ul style="list-style-type: none"> <li>Click on the textbox next to <b>Status</b> and click the <b>Submitted to DHET</b> status.</li> <li>Click the <b>save</b> button to save the record.</li> </ul> <p><b>Note:</b> The date will be automatically populated once the status is selected.</p>

## 10 MANDATORY GRANTS APPLICATIONS

### 10.1.1 MANDATORY GRANTS APPLICATIONS



Step	Action
1.	<p>NB: Once an SDF has been approved, they can apply for mandatory grants.</p> <ul style="list-style-type: none"> <li>Click <b>Mandatory grants</b> on the side navigation bar.</li> <li>The Submitted WSP/ATR view will be displayed.</li> </ul>



Step	Action
2.	<ul style="list-style-type: none"> <li>Open one of the submitted records.</li> <li>Displayed above are the different forms that the internal team can use to display the different forms.</li> <li>A click on any of the headings will redirect to the specific form.</li> </ul>

**Summary**

Trading Name \* Phungula Incorporated

Skill Development Facilitator Neo Mlangeni

Extension Date ---

Submission Window: 01 April 2022 – 31 March 2...

Administrative Organization Details		Financial Details	
Trading Name	Phungula Incorporated	SDL Number	LS00775350
Physical Code	1682	Bank Name	ABSA Bank Limited

**WSP Process** Active for 21 hours

Receive MG Evaluation (21 Hrs) Approval

**Summary** Extension(s) Documents Timeline Related v

Physical Code	* 1682	Bank Name	ABSA Bank Limited
Physical Address Line 1	* 50th Lever, Noordwyk, Midrand	Account Holder	M Mokatse
Physical Address Line 2	* Midrand	Account Type	Credit
Physical Address Line 3	---	Branch Name	Arcadia
Physical Municipality	Johannesburg Metro	Other Bank	none
Physical Urban/Rural	Urban	Finance Approval Date	12/4/2023
Physical Province	Gauteng		
Postal Code	* 1682		
Postal Address Line 1	* 50th Lever, Noordwyk, Midrand		
Postal Address Line 2	* Midrand		
Postal Address Line 3	---		
Postal Address Line 3	---		
Postal Municipality	Johannesburg Metro		
Postal Province	Gauteng		

Postal Address Line 3	---
Postal Municipality	Johannesburg Metro
Postal Province	Gauteng

**For Manager only**

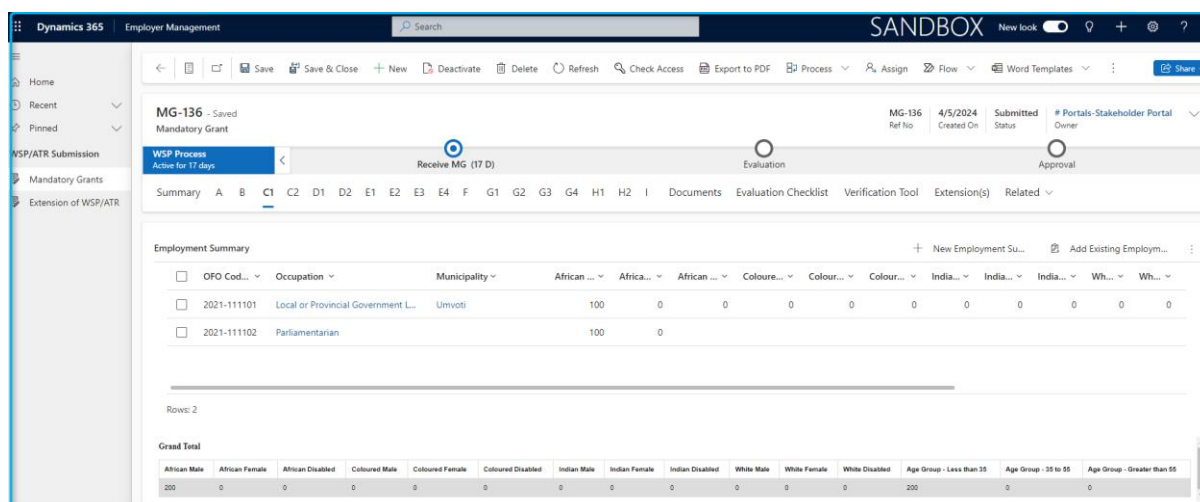
Manager ---

Status Approval ---

Approval Date ---

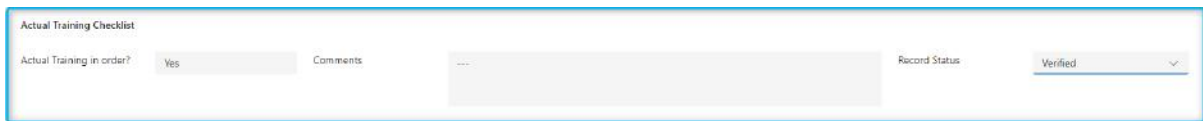
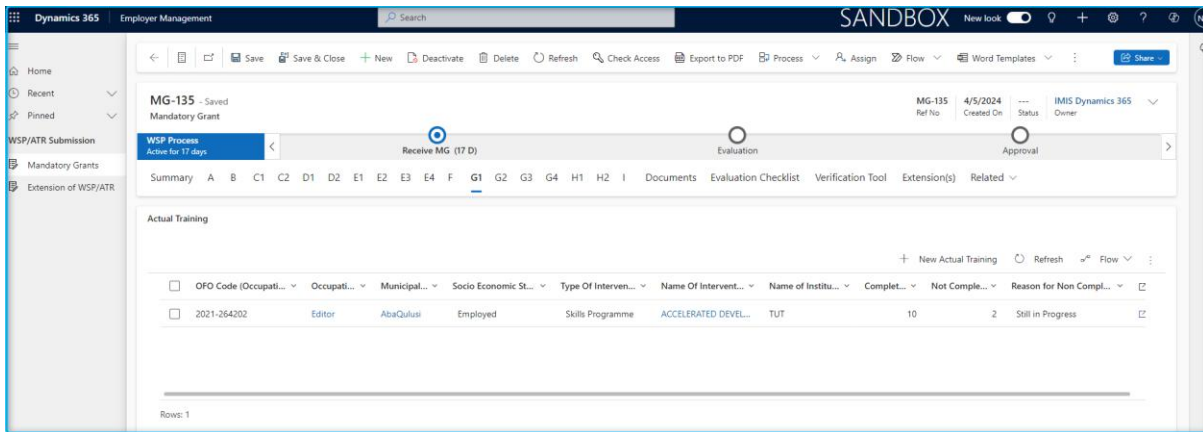
Comment ---

Step	Action
2.	<ul style="list-style-type: none"> <li>Displayed above is the information summary.</li> <li>The form populated from the portal will be displayed with all the different tabs.</li> <li>Note that the Summary, WSP and ATR will be populated from the populated from the portal.</li> </ul>

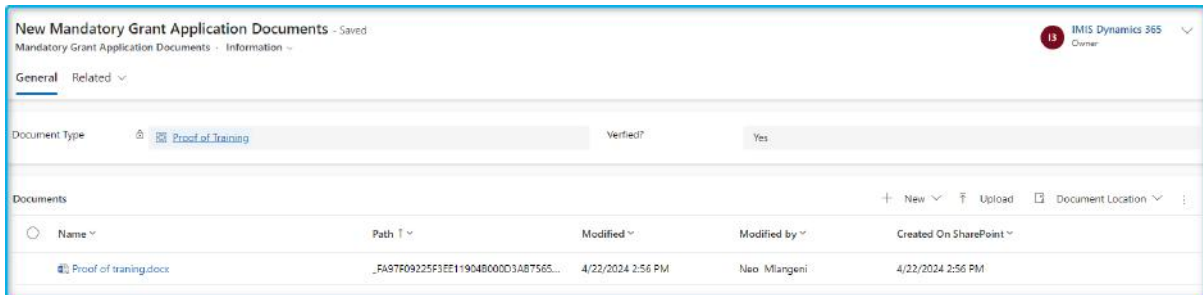
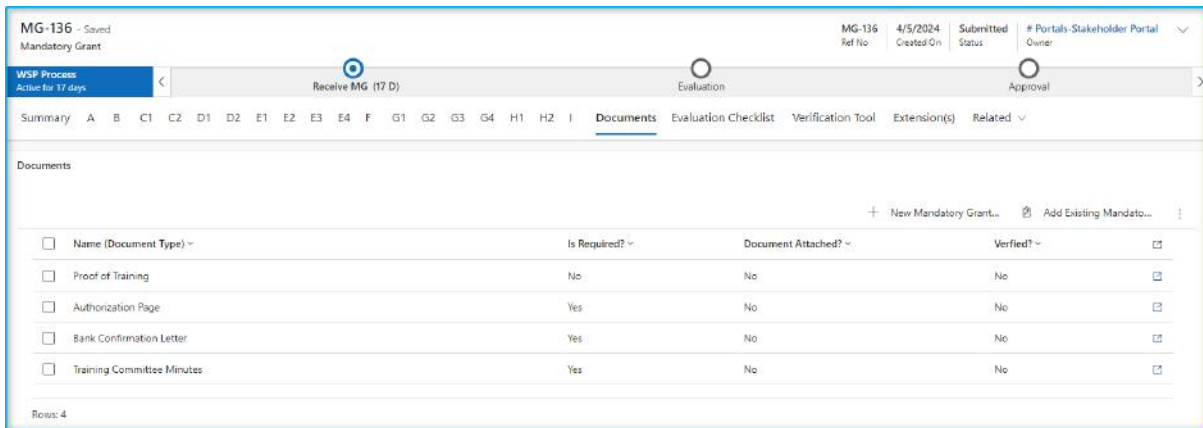


Employment Summary Checklist					
Employment Summary in order?	No	Comments	---	Record Status	Submitted

Step	Action
3.	<ul style="list-style-type: none"> <li>Click on the C1 tab and the form will be populated from the portal as per the images above.</li> <li>Click on the different tabs to view other information like the provincial breakdown, scarce skills, etc.</li> <li>Note that you can evaluate as you go along the different forms under the checklist.</li> <li>You can put comments and select the record status.</li> <li>Note that from C1 to F are the WSP forms</li> </ul>

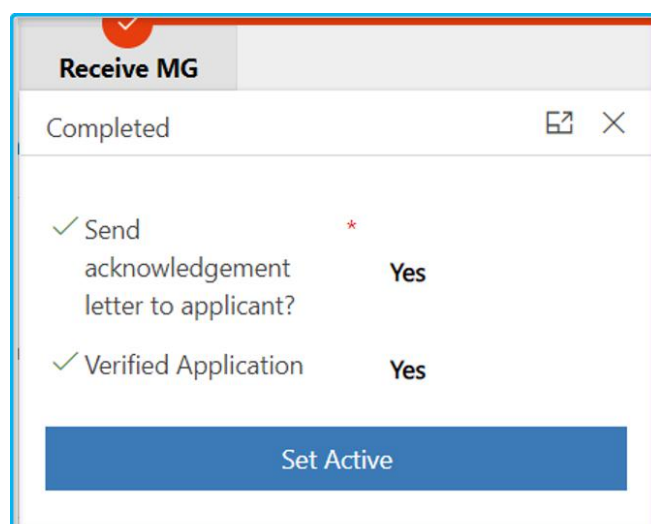


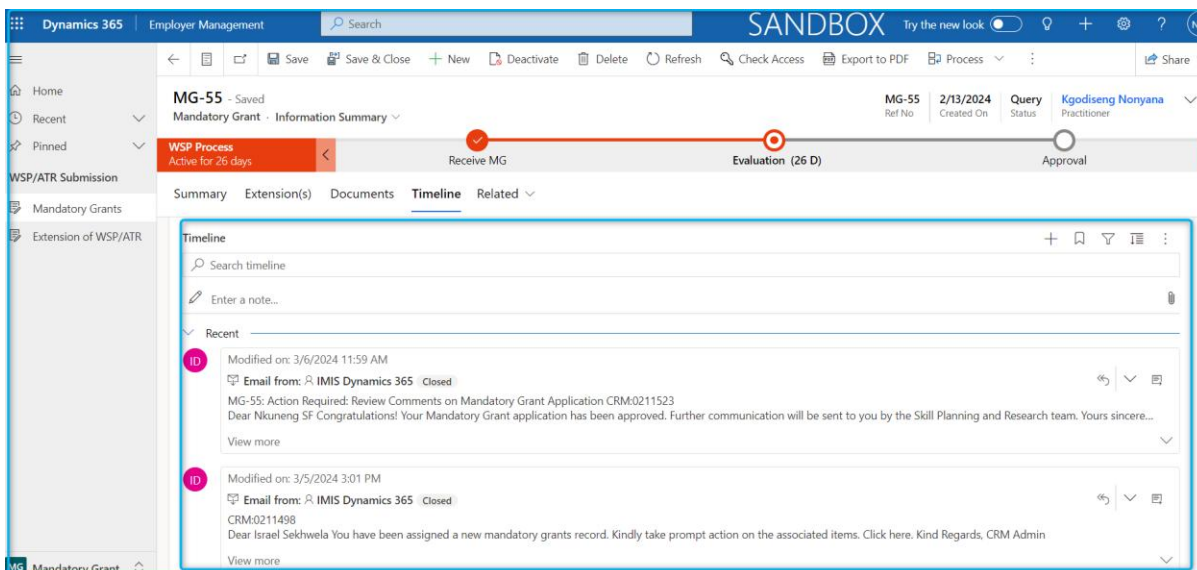
Step	Action
4.	<ul style="list-style-type: none"> <li>Click on the G1 tab and the form will be populated from the portal as per the images above.</li> <li>Click on the different tabs to view other information like actual pivotal training, abet completed, expenditure of training budget etc.</li> <li>Note that you can evaluate as you go along the different forms under the checklist.</li> <li>You can put comments and select the record status.</li> <li>Note that G1 till I are the ATR forms.</li> </ul>



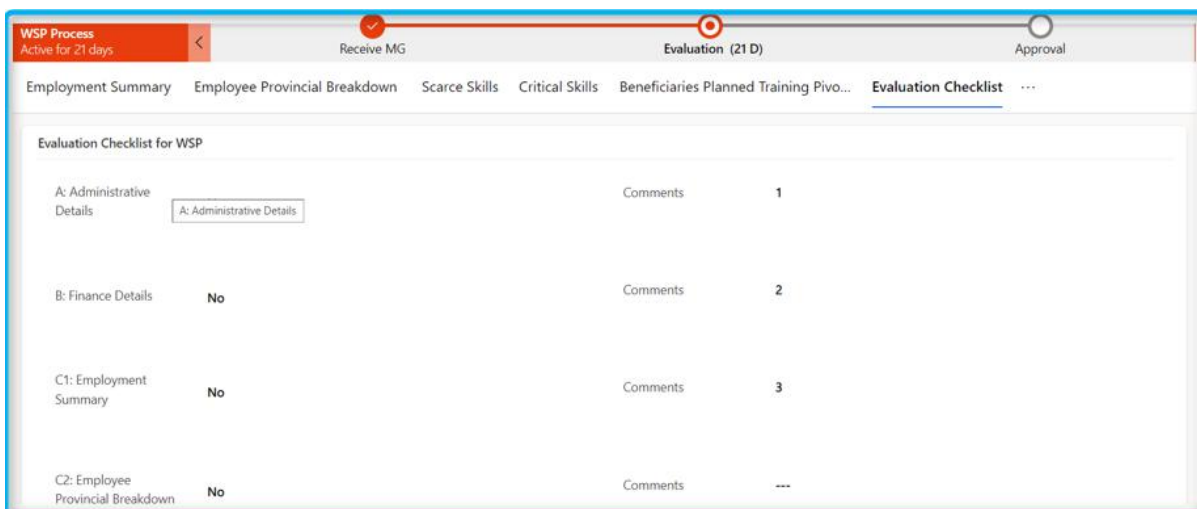
Step	Action
5.	<ul style="list-style-type: none"> <li>• Click on the documents tab and the form will be populated from the portal as per the images above.</li> <li>• Click on each document to open it.</li> <li>• Note that when you click on each document, it will redirect you to the specific document section as displayed above.</li> <li>• You can click on the document to view it and select yes from the verified options.</li> <li>• Click save once done and move on to the next document and apply the same steps.</li> </ul>

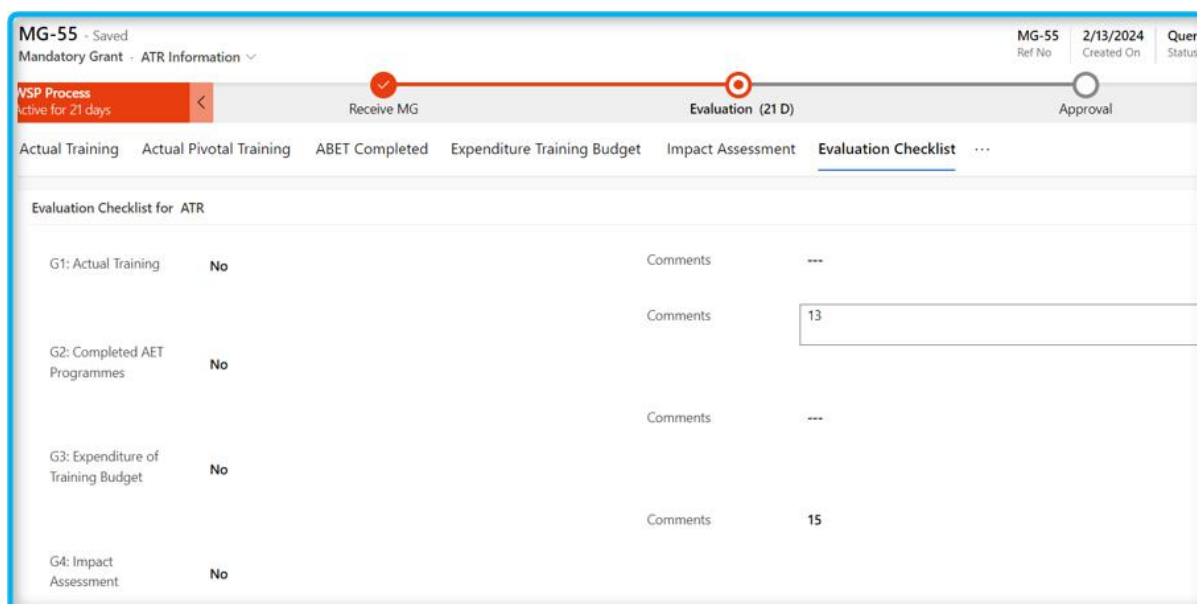
### 10.1.2 PROCESSING OF MANDATORY GRANT APPLICATIONS





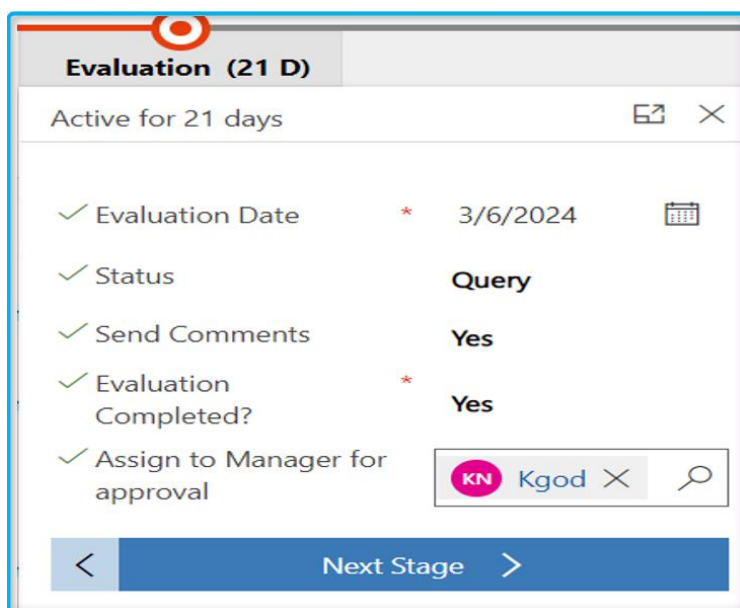
Step	Action
1.	<p>Below is a business process flow which is used for accepting or declining Mandatory Grants.</p> <ul style="list-style-type: none"> <li>Practitioners receive the MG and evaluate it.</li> <li>Click on the <b>Receive MG</b> on the process flow to start processing the application.</li> <li>Click on the textbox next to <b>Send Acknowledgement letter to applicant</b> and select yes.</li> <li>Click on the textbox next to <b>Verified Application</b> and select yes.</li> <li>Click the <b>next</b> button to proceed to the Evaluation stage.</li> </ul> <p><b>Note:</b> When an MG is received, it can be tracked on the timeline.</p> <ul style="list-style-type: none"> <li>The practitioner is automatically assigned the record when they start working on it.</li> </ul>





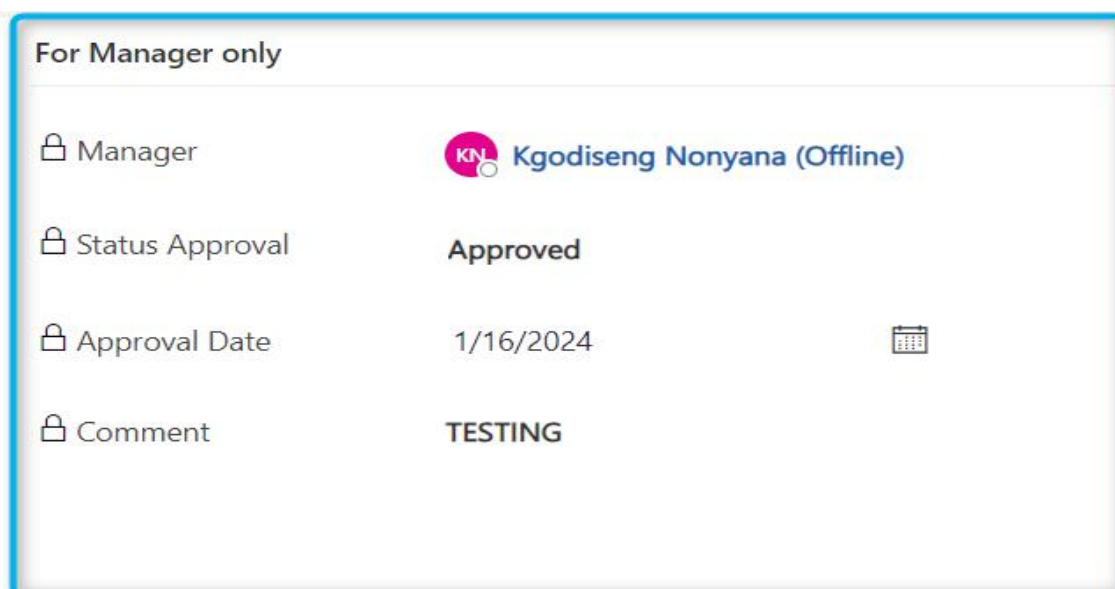
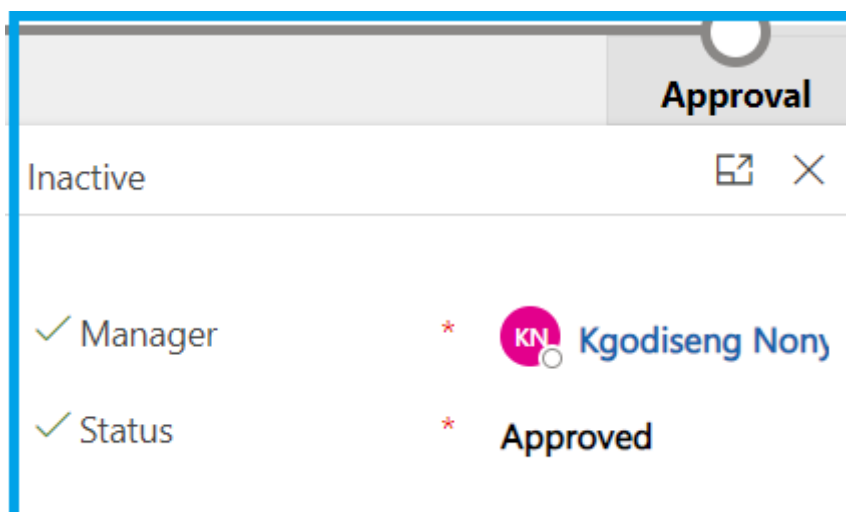
Step	Action
2.	<ul style="list-style-type: none"> <li>Click on the <b>Evaluation Checklist</b> tab.</li> <li>The form will automatically update as you navigate do a checklist on the different forms for ATR and WSP</li> <li>The above image displayed is how the form will be once populated.</li> </ul>

Step	Action
3.	<ul style="list-style-type: none"> <li>Click on the <b>Verification Tool</b> tab.</li> <li>Complete the form.</li> <li>Above is how the form will be displayed once populated.</li> <li>Once done with populating the form, you may proceed to the Evaluation stage.</li> </ul>



Step	Action
4.	<ul style="list-style-type: none"> <li>Click on the textbox next to Evaluation Date and select the date when you'll be evaluating the application.</li> <li>The date will be displayed as ddmmyyyy.</li> <li>Click on the textbox next to <b>Status</b> and select a status.</li> <li>Click on the textbox next to <b>Send Comments</b> and select a status.</li> <li>Click on the textbox next to <b>Evaluation Completed</b> and select yes.</li> <li>Click on the textbox next to <b>Assign to Manager for Approval</b> and assign a manager only if the record is not in query.</li> <li>Click the <b>next</b> button to proceed to the Approval stage.</li> </ul> <p><b>Note:</b> The <b>Evaluation by</b> textbox is automatically populated from the previous stage.</p> <ul style="list-style-type: none"> <li>When the selected status is query, all the comments on the summary checklist are sent with the e-mail.</li> <li>The practitioner can assign the administrator to follow up with the SDF when the Status is in query.</li> </ul>

Step	Action
5.	<ul style="list-style-type: none"> <li>Click on the textbox next to <b>Status</b> and select a status.</li> <li>Click the <b>Finish</b> button to proceed to complete the approval.</li> </ul> <p><b>Note:</b> The <b>Manager</b> is automatically populated from the previous stage.</p> <ul style="list-style-type: none"> <li>Once the approval is done, it will be automatically populated under the summary tab under the heading 'For Manager Only'.</li> <li>All the notifications will be tracked on the timeline.</li> </ul>



Step	Action
5.	<ul style="list-style-type: none"> <li>Click on the textbox next to <b>Status</b> and select a status.</li> <li>Click the <b>Finish</b> button to proceed to complete the approval.</li> </ul> <p><b>Note:</b> The <b>Manager</b> is automatically populated from the previous stage.</p> <ul style="list-style-type: none"> <li>Once the approval is done, it will be automatically populated under the summary tab under the heading 'For Manager Only'.</li> <li>All the notifications will be tracked on the timeline.</li> </ul>

If the Application is in Query then follow the following steps:

Step	Action
1.	<ul style="list-style-type: none"> <li>Repeat step 1 till 5 but don't select the <b>assign to manager for approval</b>.</li> </ul>

**Private Organization** ▾

All Mandatory Grants

Capturing Mandatory Grants

✓ Private Organization

Public Organization

Submitted WSP/ ATR Default

---

Set as default view

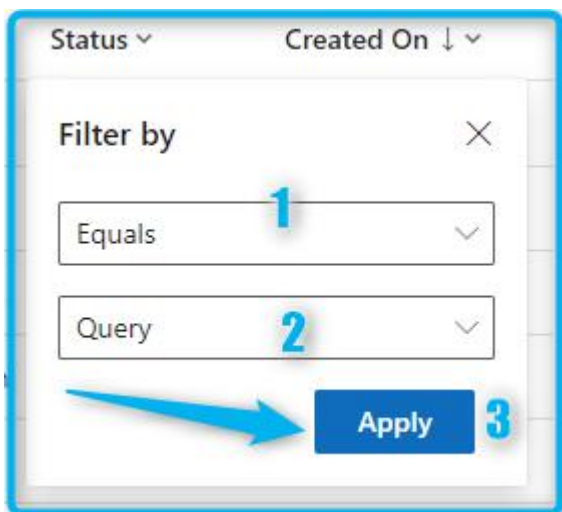
Reset default view

Manage and share views

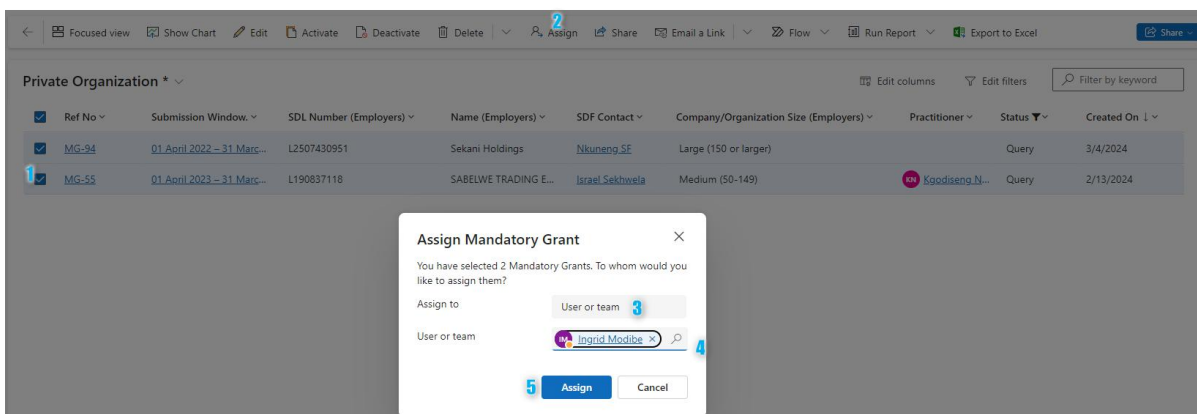
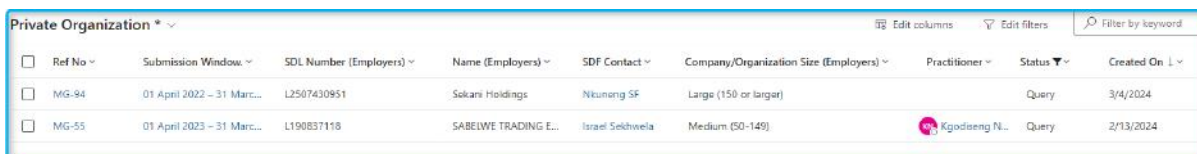
Step	Action
2.	<ul style="list-style-type: none"> <li>Select the <b>Private organization/Public Organization</b> as displayed above.</li> </ul>

**Private Organization** ▾ Edit columns Edit filters Filter by keyword

Ref No	Submission Window	SDL Number (Employers)	Name (Employers)	SDF Contact	Company/Organization Size (Employers)	Practitioner	Status	Created On
MG-123	01 April 2023 – 31 Marc...	L2507430951	Sekani Holdings	Nkuneng SF	Large (150 or larger)			
MG-110	01 April 2022 – 31 Marc...	X-111110008	Neo M PTY LTD	Taha Jamal	Medium (50-149)			24
MG-109	01 April 2023 – 31 Marc...	X-111110008	Neo M PTY LTD	Taha Jamal	Medium (50-149)	IS Israel Sekhw...		24
MG-106	01 April 2022 – 31 Marc...	L200708818	T & H Administration...		Large (150 or larger)	NM Neo Mlangeni	Declined	3/15/2024
MG-97	01 April 2022 – 31 Marc...	X-111110017	Sekani Holdings		Large (150 or larger)		Created	3/5/2024
MG-94	01 April 2022 – 31 Marc...	L2507430951	Sekani Holdings	Nkuneng SF	Large (150 or larger)		Created	3/4/2024
MG-55	01 April 2023 – 31 Marc...	L190837118	SABELWE TRADING E...	Israel Sekhwela	Medium (50-149)	NY Kgodiseng N...	Declined	2/13/2024
MG-40	01 April 2022 – 31 Marc...	L550749669	Africa Renaissance Sec...	mageva mageva	Medium (50-149)			2/7/2024



Step	Action
3.	<ul style="list-style-type: none"> <li>Note that all the private organizations/public organizations will be displayed under this view depending on what you have selected.</li> <li>Click on filter by under the status column.</li> <li>Select <b>equals</b> and select <b>query</b>.</li> <li>Click on the <b>apply</b> button.</li> </ul>



Step	Action
4.	<ul style="list-style-type: none"> <li>Note that only the query records will be displayed as the first image above.</li> <li>Select the records by clicking on them.</li> <li>Click on the <b>assign</b> button.</li> <li>Select user or team from the <b>assign to</b> textbox.</li> <li>Search the <b>user or team</b> by populating her name.</li> <li>Click on <b>assign</b> button.</li> </ul>

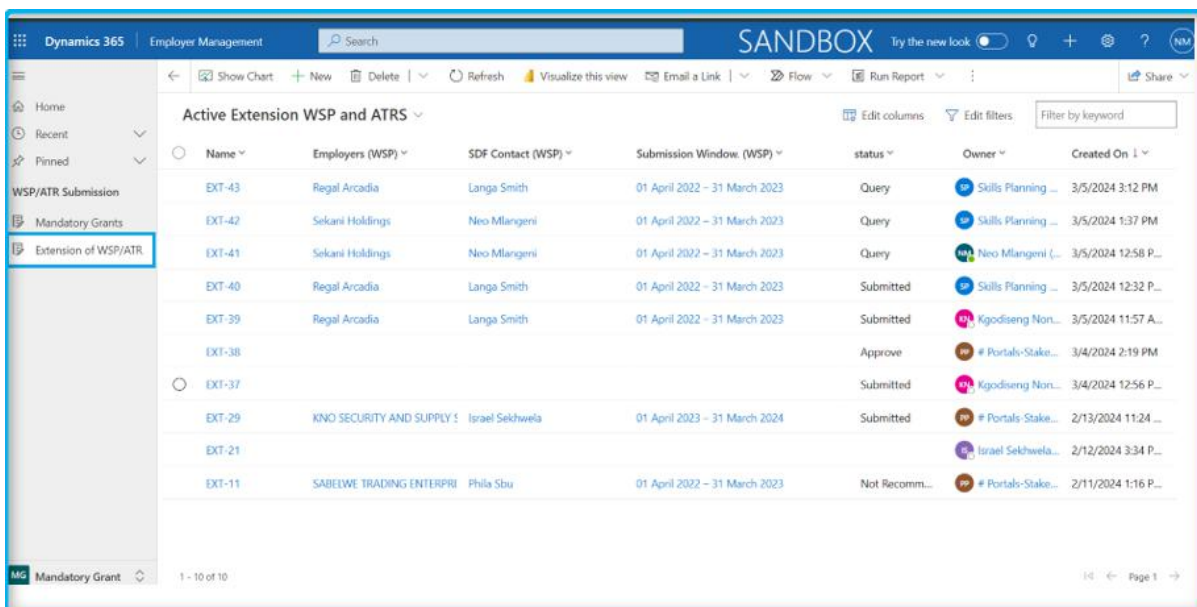
- Note that this will automatically be sent via e-mail to assigned user.

Alternatively

- The assigned practitioner can click on the **export to excel** button.
- This would download the query excel file on the practitioner’s machine.
- The practitioner can then email this to the administrator.

Once all the queries have been resolved, repeat step 4 by assigning to the manager and proceed to step 5 to conclude the process.

### 10.1.3 EXTENSION OF WSP



Step	Action
1.	<ul style="list-style-type: none"> <li>Click the <b>Extension of WSP</b> side navigation bar under WSP/ATR Submission.</li> <li>Active Extension WSP and ATRS view will be displayed as shown above.</li> </ul>

**Reason for the Extension Request**

Reason(s) for extension Request: \* testing

**Details of the Organisation**

Mandatory Grant

Reference number \* MG-97

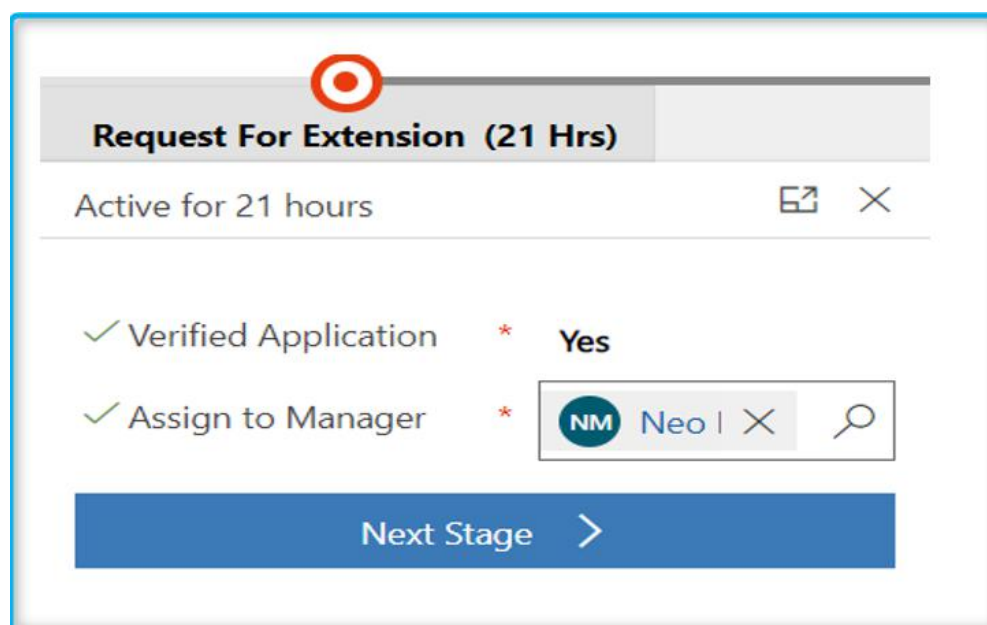
Financial Year 01 April 2022 – 31 March 2023

SDF Contact Neo Mlangeni

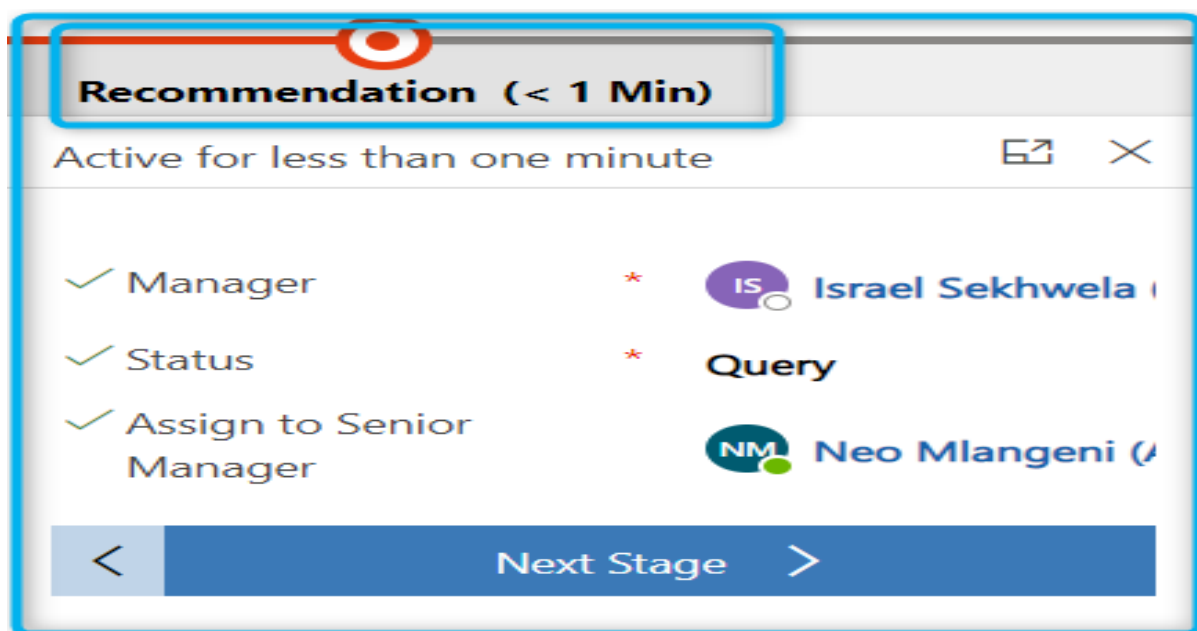
Employer \* Sekani Holdings

Step	Action
2.	<ul style="list-style-type: none"> <li>Click on one of the Active Extension WSP and ATRS to open it.</li> <li>Displayed above is what the Extension of WSP and ATR will look like. This information is populated from the portal.</li> </ul>

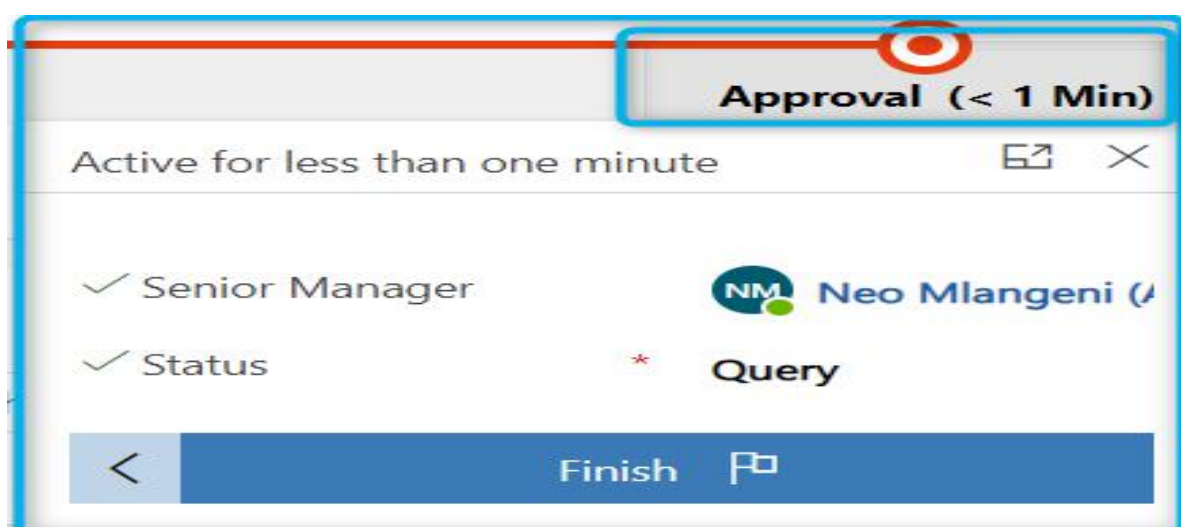
#### 10.1.4 PROCESSING OF THE EXTENSION OF MANDATORY GRANTS



Step	Action
3.	<ul style="list-style-type: none"> <li>Below is a business process flow which is used for accepting or declining Mandatory Grants extension.</li> <li>Note the owner is automatically assigned to the record once they start working on it.</li> <li>Click on the textbox next to <b>Verified Application</b> and select yes.</li> <li>Click on the textbox next to <b>Assign to Manager</b> and assign a manager.</li> <li>Click the <b>next</b> button to proceed to the Recommendation stage.</li> </ul>



Step	Action
4.	<ul style="list-style-type: none"> <li>Click on the textbox next to <b>Status</b> and select a status.</li> <li>Click on the textbox next to <b>Assign to Senior Manager</b> and assign a Senior Manager.</li> <li>Click the <b>next</b> button to proceed to the Approval stage.</li> </ul> <p><b>Note:</b> The <b>Manager</b> textbox is automatically populated from the previous stage.</p>



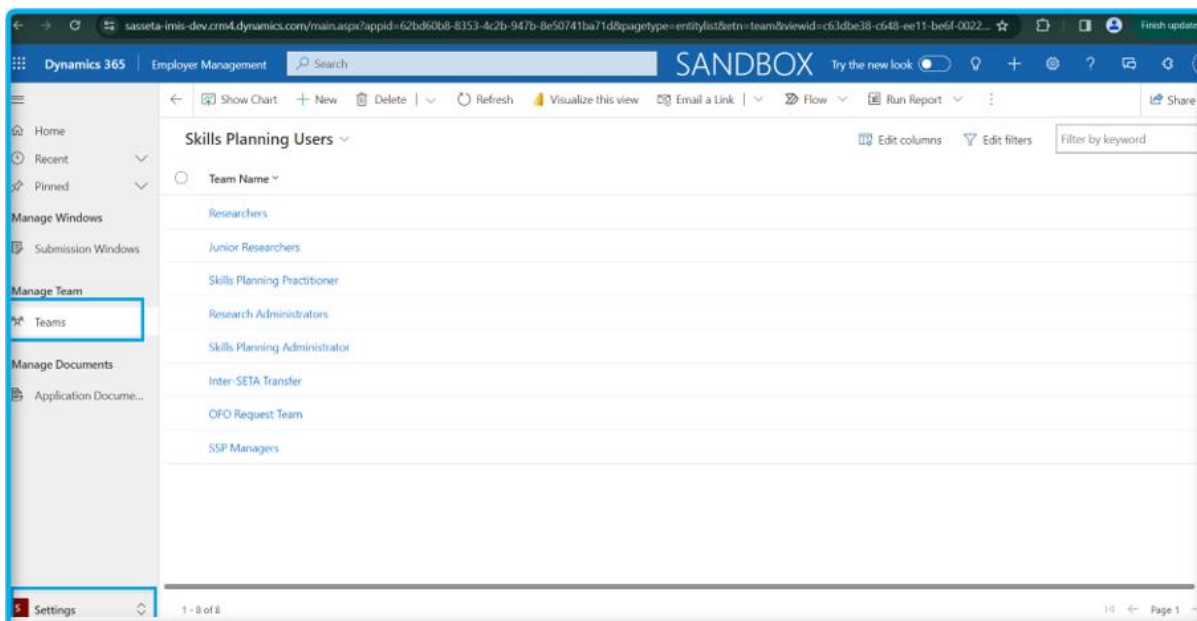
**For Senior Manager only**

Senior Manager	<b>Neo Mlangeni (Available)</b>
Senior Manager Approval	<b>Approved</b>
Approval Date	1/13/2024
Comment	---

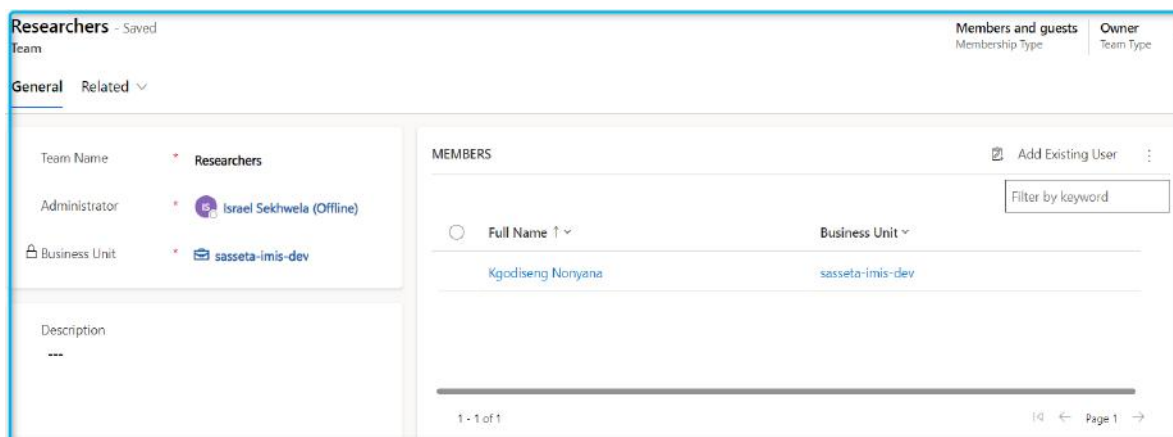
Step	Action
5.	<ul style="list-style-type: none"> <li>Click on the textbox next to <b>Status</b> and select a status.</li> <li>Click the <b>Finish</b> button to proceed to complete the approval.</li> </ul> <p><b>Note:</b> The <b>Senior Manager</b> is automatically populated from the previous stage.</p> <ul style="list-style-type: none"> <li>Once the approval is done, it will be automatically populated under the General tab under the heading 'For Senior Manager Only'.</li> <li>All the notifications will be tracked on the timeline</li> </ul>

## 11 SETTINGS

### 11.1.1 TEAMS

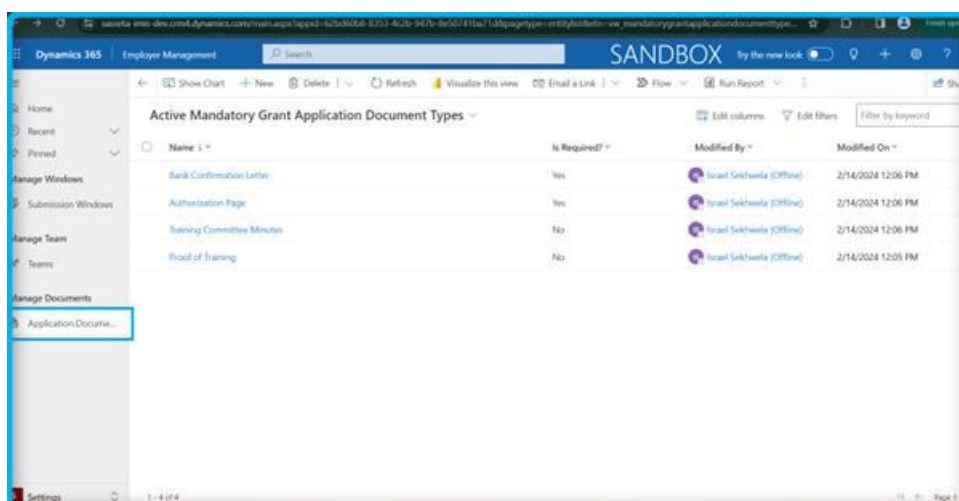


Step	Action
1.	<ul style="list-style-type: none"> <li>• Select Settings on the menu bar.</li> <li>• Click on <b>Teams</b> side navigation bar under Manage Teams.</li> <li>• Skills Planning Users view will be displayed as shown above.</li> </ul>



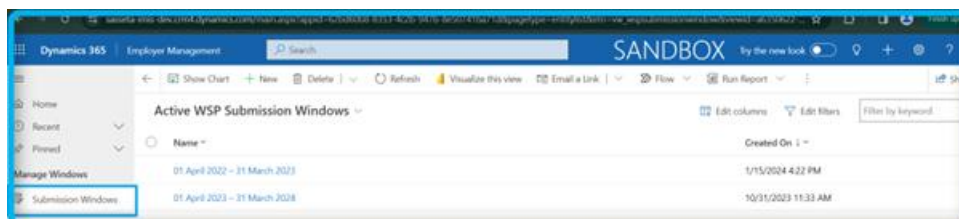
Step	Action
2.	<ul style="list-style-type: none"> <li>• Click on any team you want to add members to the team.</li> <li>• Click on Add existing User to add a team member.</li> <li>• Click Save</li> </ul>

### 11.1.2 APPLICATION DOCUMENTS



Step	Action
1.	<ul style="list-style-type: none"> <li>• Select Settings on the menu bar.</li> <li>• Click on <b>Application Documents</b> side navigation bar under Manage Teams.</li> <li>• MG Document types of view will be displayed as shown above (these are all the documents that an SDF would need to apply for MG).</li> </ul>

### 11.1.3 SUBMISSION WINDOWS



Step	Action
1.	<ul style="list-style-type: none"> <li>• Select Settings on the menu bar.</li> <li>• Click on <b>Submission Windows</b> side navigation bar under Manage Windows.</li> <li>• The Active WSP Submission Windows view will be displayed as shown above. These windows represent all the periods during which an SDF would need to apply for MG</li> </ul>