LEARNER MANAGEMENT INFORMATION SYSTEM GUIDELINE:

MANDATORY GRANT APPLICATION

SKILLS DEVELOPMENT PROVIDER USER PROFILE

Services Sector Education & Training Authority (Services SETA)
15 Sherborne Road, Parktown, Gauteng; 2193
P O Box 3322, Houghton; 2041
Email: customercare@serviceseta.org.za
Website: www.serviceseta.org.za
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INTRODUCTION

This guide has been developed by the Service SETA to guide skills development facilitators within the services industry to submit the Workplace Skills Plan, Annual Training Report, Pivotal Training report and Pivotal Training Plan on the Learner Management Information System (LMIS) and gain access to Mandatory Grant applications.

Please note the LMIS is not only limited to Mandatory Grant applications, but is utilise across the various SSETA units, please ensure for the purposes of this process your register/have registered as user type Skills Development Facilitator.

The LMIS has three phases for the submission of the Mandatory Grants application. Kindly ensure that all three phases have been completed and you have received an automated response form the LMIS confirming your Workplace Skills Plan and Annual Training Report submission has been successful.

The three phases on the LMIS are:
- The Pre-Application Phase:
  - Skills Development Facilitator Registration
  - Company Registration
- Application Phase:
  - Provincial Profile
  - Training Committee Details
  - Hard to fill Vacancies
  - Skills Gaps
- Submission Phase:
  - Employee Registration
  - Creation of Intervention
  - Creation of Class
  - Enrolment
  - Document upload
  - Submission

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A. PRE – APPLICATION PHASE

Skills Development Facilitator account registration

Link to LMIS: https://lmis.dedicated.co.za/lmis/Account/Login
The above link can be used to gain direct access to the LMIS login and registration page.

Creating a new profile

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Home   Login

SETA Learner Management Information System

Login 🔓

Please enter your username and the password.
If you are not a registered user yet, please contact the LMIS HelpDesk for assistance.

Please provide login details

User Name:

Password:

User Type: ▼

A value is required for User Type. Please provide a value for User Type

☐ Show Password?

Login   Register

If you have registered already but **forgotten your password**. Please Click here

1. For first time users an LMIS account will need to be created, click the "Register" button to be taken to the below registration screen.
2. The account must be created with the user type of "Skills Development Facilitator".
3. Enter a username (this needs to be unique), you will be prompted if the name is not available.
4. A password will also need to be created and confirmed.
5. Complete the reCAPTCHA image to confirm authenticity.
6. Click the "register" button.

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Home   Login

Register User

User Name:	
E-mail Address:	
User Type:	Skills Development Facilitator ▾
Password:	
Confirm password:	
Show Password(s)?:	☐

☐ I'm not a robot   reCAPTCHA
Privacy - Terms

Register

7. Once registration is complete, an email will be received to your entered email address with an activation code.

8. Upon first login to the LMIS you will need to enter this activation code and proceed to activate the account.

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LMIS registration information Inbox ×

Services SETA Team <noreply@lmis.co.za>
to WSPTEST2021 ▾

Dear User

Your login details for the LMIS (when logging in using this password we suggest you copy and paste the password to avoid any errors):

details for the LMIS and Activation Code to avoid errors.

Login: **WSP2021TEST**

Password: **LMIS2021Test!**

Activation Code: **eb91098d68fe42c3ac04ece1f1a033bb**

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

Kind Regards

LMIS Admin Team

Services SETA Team
Information & Communications Technology
Email: helpdesk@serviceseta.org.za
Tel: +27 11 276 9600
Website: www.serviceseta.org.za

Verify Account

Verify Account

User Name:	WSP2021TEST
E-mail Address:	WSPTEST2021@gmail.com
Activation Code:	eb91098d68fe42c3ac04ece1f1a033bb

Please wait...

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9. The details of the Skills Development Facilitator must be entered into the SDF details screen below, these are the details of the individual completing the submission.
10. Click "Save" at the top or bottom of the screen to save the details and proceed.

11. Complete the next set of SDF details, questionnaire, and work details, once all fields are completed you can click "Save" to save the details to the LMIS system. You will be able to proceed to the company registration section once the SDF profile has been completed.

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Administration ⌄   Mandatory Grants ⌄   Log Off

SDF DETAIL   **WSP SUMMARY**

Enter the details of the sdf. Click on **Save** to save the changes that you have made. Click on **Edit** to edit an already existing sdf record. Click on **Back** to return to the person details screen.

Save   Back

SDF Name: WSP TEST   SDF Number:

Id Number: 0006015000081

Have you been trained in the use of the SSETA sector specific Career Guide?: ☐

Have you been on any of the SSETA SDF training?: ☐   Most Recent Year: 0

How long have you been in the field of skills development? Years: 0   Months: 0

Have you submitted a WSP to SSETA before?: ☐   Most Recent Year: 0

Are you a member of the ASDFSA?: ☐

SDF EMPLOYER DETAILS

1 Are you working on behalf of a company of which you are not the owner?: ☐

OR:

2 Are you working in your own person capacity?: ☐

Work Phone No: Company Name:

Contact First Name(s):   Company Address Line 1:

Contact Last Name: Address Line 2:

Contact Phone No: Address Line 3:

                                                        Postal Code:

*Once the information has been successfully completed and saved, a message indicating the data is saved successfully and the information can be viewed.

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Administration ▾   Mandatory Grants ▾   Log Off

Logged on as: WSP2021TEST.....User Type: Skills Development Facilitator

Record saved successfully.   ✕

Skills Development Facilitator Details

| SDF DETAIL | WSP SUMMARY |

Enter the details of the sdf. Click on **Save** to save the changes that you have made. Click on **Edit** to edit an already existing sdf record. Click on **Back** to return to the person details screen.

Edit   Company Registration ✚   Back

SDF Name: WSP TEST   **SDF Number:** SDF024970
Id Number: 0006015000081

Have you been trained in the use of the SSETA sector specific Career Guide?: N

Have you been on any of the SSETA SDF training?: N   **Most Recent Year:** 0
How long have you been in the field of skills development? Years: 10   **Months:** 6
Have you submitted a WSP to SSETA before?: Y   **Most Recent Year:** 2015
Are you a member of the ASDFSA?: N

SDF EMPLOYER DETAILS

1 Are you working on behalf of a company of which you are not the owner?: Y

OR:

2 Are you working in your own person capacity?: N

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12. The WSP Summary page is a list of all WSP ATR registration the SDF has engaged, once the details of a company have been saved on main company details, they will appear here where the submission can be proceeded with. The companies will no longer appear in company registration if the company is already linked (companies are automatically delinked at the end of each submission period).

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Administration ▾   Mandatory Grants ▾   Log Off

Record saved successfully.   ✕

WSP Summary

SDF DETAIL   WSP SUMMARY

Company Registration ✚
- **Pre-Application** - *SDF Registration and Company Profile*
- **Application** - *Company Additional Information*
- **Submitted** - *WSP and ATR Information Submitted*

The grid below details all of the wsps linked to the sdf. Note that you are able to sort and filter the records in the grid

Financial Year ▼	SDL Number ▼	WSP Status ▼	

No items to display

|◀ ◀   0   ▶ ▶|

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Logging into and existing profile

13. If an SDF LMIS profile has been created in the past, then the profile can be logged into for the submission.
14. If any details of the SDF have changed then they can use the "Edit" button to update the information and "Save" to confirm the new data once completed. **Note if a new SDF has been appointed then a new profile for the SDF should be created.**
15. If the profile has become inactive then an email with the username and email address of the profile should be sent to lmishelpdesk@serviceseta.org.za requesting the account be activated, a notification will be received once this is complete.

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Home   Login

System

Login 🔓

Please enter your username and the password.
If you are not a registered user yet, please contact the LMIS HelpDesk for assistance.

Please provide login details

User Name:	WSP2021TEST
Password:	••••••••••••
User Type:	Skills Development Facilitator ▾

☐ Show Password?

Login   Register

If you have registered already but **forgotten your password**. Please Click here

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Company Registration

16. When the SDF is ready to link an SDL number to their profile for submission purposes, the "Company Registration" button available on the SDF details page and the WSP summary page, this will take you to the Main Company Details page.

17. Company registration will request for a SDL number to be entered, or a non-levy paying company registration to be completed (using the company's registration number and details).

18. Once the SDL number is entered or Non-levy paying registration completed, the main company details page should auto populate with the company name and trading name, and any other details available from the SSETA database and previous submission information, this should be updated and saved if the details are incorrect. Where details are incurred that cannot be edited (such as company name) a request will need to be made to the SSETA to have these amended.

19. Contact information, banking details, and number of staff need to be inputted, as well as the completed declaration document (available on the SSETA website – LINK) once the details are completed in full the SDF can save the details, and this will add the company to the SDF's profile

20. Once the main company details are saved, the company will no longer be able to be accessed using the company registration function, but will be added to the WSP Summary page, were the option to continue with the submission is available.

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Administration ▾   Mandatory Grants ▾   Log Off

Logged on as: WSP2021TEST.....User Type: Skills Development Facilitator

Main Company Details

| MAIN COMPANY | PROVINCIAL PROFILE | TRAINING COMMITTEE | HARD TO FILL VACANCIES | SKILLS GAPS | SUBMIT APPLICATION |

WSP and ATR Submission for 2021 / 2022

Enter the details of your company. Click on **Save** to save the changes that you have made. Click on **Edit** to edit an already existing wsp. Click on **Back** to return to the sdf screen.

Save   Back   Add New Company   Next Page >>   << Previous WSP   Next WSP >>   Search Non Levy Paying Member

SDL Number: Search for...   Search   **Trading Name:**

Company Reg No.:   **Company Name:**

In which Industry is this company involved? :

What is the main business of the company * :

Training Done Previous Financial Year ? : ○ Yes   ● No

Appointment Letter: SELECT FILES...

Company Banking Details

Bank Account Holder: **Bank Name:** ▼   **Account Type:** ▼

Bank Account No.:   **Bank Branch Code:**   **Bank Branch Name:**

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B. APPLICATION PHASE

21. The remaining 5 tabs will be unlocked once the main company details are saved, these need to be completed for the registration phase of the Mandatory Grant submission to be completed.
22. The Provincial profile is a list of physical offices of the company being submitted, the sum of employees represented per office must be equal to the "Total Employees" reported on the main company details page.
23. Once the contact details, number of staff and province has been selected, the "Add" button should be clicked, to save each entry in the table below.

Provincial Profile

| MAIN COMPANY | PROVINCIAL PROFILE | TRAINING COMMITTEE | HARD TO FILL VACANCIES | SKILLS GAPS | SUBMIT APPLICATION |

Provincial Profile

Province * : -- type and/or select --   Total Staff * : 0   No of Branches * : 1

Branch Name * :   Contact Number of Branch * :

<< Previous Page   Next Page >>

| SDL No | Province | Total Number of Staff | Number of Branches | Branch Name | Branch Contact No |

24. If the company has reported more than 49 total employees on main company details, a Training Committee should be represented on the training committee page below.
25. Any committee that is involved in the skills development of employees in the organisation can be used, if the meetings can be evidenced. These members details are captured on the below page, each entry must be added using the "add" button and the committee members details will be saved to the table.

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Training Committee

| MAIN COMPANY | PROVINCIAL PROFILE | TRAINING COMMITTEE | HARD TO FILL VACANCIES | SKILLS GAPS | SUBMIT APPLICATION |

WSP and ATR Submission for 2020 / 2021

If your company has more than 50 employees this section must be completed. Please note at least 4 training commitee members should be provided to formulate a quorum

Constituency * :   -- type and/or select --   Title * :

First Names * :   Surname * :

<< Previous Page   Next Page >>

Title	First Names	Surname	Constituency

26. The Hard – To – Fill Vacancies (HTFV) and Skills Gaps are part of DHET's Workplace Skills Survey. The section requires employers to provide the HTFV by the 6-digit OFO occupation titles.

27. The drop-down menu contains all active OFO codes (2017), the 6-digit number can be typed into the field and the options match will be searched in the list of codes.

28. Each OFO code match a HTFV should be saved before the next is selected, these will appear in a list once saved below the search field.

Hard To Fill Vacancies

| MAIN COMPANY | PROVINCIAL PROFILE | TRAINING COMMITTEE | HARD TO FILL VACANCIES | SKILLS GAPS | SUBMIT APPLICATION |

TRAINING PROVISION FOR THE PERIOD From 1-April-2019 To 31-March-2020

Hard to fill vacancies not applicable? :   ☑

Hard to Fill vacancies are vacancies that take longer than 6 months to fill
This section requires the respondent to provide reasons why *Hard-To-Fill-Vacancies (HTFV)* are not applicable

Reason why not applicable :

<< Previous Page   Next Page >>

Reason
No Vacancies Available

29. A skills gap refers to skills that an employee does not have to carry out job tasks competently. It also referred to as "top-up" skills. This section requires the employer to provide information on Skills Gaps of employees.

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30. The Skills Gaps page requires the SDF to select the major OFO code group that the skills gaps exist in, and then a critical skills group of the skill gap identified. The critical skills list is based on the skills group selected. A reason from the pre-set "reason for skills gap" must also be selected and the data set saved, once it is saved it will appear in the window below, and additional skills gaps can be identified.

31. The final step of Registration Phase to proceed with the submission of WSP and ATR is to confirm the previous information, a summary of the pages is listed on the Submit Application.

32. Once all pages indicate a "Y" (Training committee profile can be N if the total employees stated was less than 50). To proceed to complete the WSP and ATR data the "Submit Application" button must be pressed, this prompt the user to confirm they would like to move to the WSP / ATR submission page as the registration information can not be updated past this point.

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Submit Application

| MAIN COMPANY | PROVINCIAL PROFILE | TRAINING COMMITTEE | HARD TO FILL VACANCIES | SKILLS GAPS | SUBMIT APPLICATION |

WSP and ATR Submission for 2020 / 2021

All sections must be completed before you can print and submit the verification document.
Please note that once you have submitted the WSP/ATR you may not change the values within these screens.
Each main company must be submitted separately and a separate Declaration and Verification document must be forwarded to the SETA

Main company details completed	Y
SDF profile completed	Y
Provincial profile added	Y
Training committee profile added	N
Hard To Fill Vacancies completed	Y
Skills Gaps Completed	Y

<< Previous Page   WSP and ATR

C. SUBMISSION PHASE

Workplace Skills Plan and Annual Training Report submission

There are 3 steps to completing the Workplace Skills Plan and Annual Training Report data.

- loading and employee profile (list of all employees in the organisation listed by demographic and OFO code data),
- an intervention profile and class creation (list of all training interventions completed, and planned)
- and lastly to link the employees listed from the employee profile to the relevant training captured in the intervention profile.

These are linked and given a status to demarcate them to the WSP or the ATR.

Employees

All employees within the organisation, including any external parties tht will be reported on the ATR or WSP will need to be captured.

There are various ways to load the employee details:

1. **Add new employee**

   This will open a window prompting the user to capture all required infomartion on each employee/beneficiary. All infomration needs to be completed accurately as per the individuals detials. Once the infaromtion has been inputted, clicking save will add the data to the employee page, and options to view (open the information for editing) or delete the reocrd is available. Should any required information be ommitted or is not in line with the required options an error will be displayed and will not be saved until corrected.

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LMIS - Capture WSP Employee

Employee No.:					
ID Type:	-- type and/or select --	ID No.:			
First Name:		Middle Name:		Last Name:	
Birth Date:	0001-01-01	Gender:	-- type and/or select --	Equity:	-- type and/or select --
Disability Status:	-- type and/or select --	Citizenship Status:	-- type and/or select --		
Municipality:	-- type and/or select --				
Highest Qualification Type:	-- type and/or select --	Highest Qualification Title:			
Employment Type:	-- type and/or select --	Employment Status:	-- type and/or select --	Job Title:	
OFO:	-- type and/or select --				
Create Date:	0001-01-01			Last Update Date:	
Create User:				Last Update User:	

Save Cancel

2. Copy From Last Year

This option is only avaialbe for organisations that have completed the previous years submission on the LMIS. Selecting this will pull all previous employee data submitted to your current submission. Should any individuals detials need to be amended the view option can be selected and edited before being saved and updated. Details that are no longer required can be deleted, and any new entries can be added using the Add New Employee option.

3. Import from Excel

An excel template exists on the SSETA website (Employers -> Mandatory Grants -> Documents) that ca be populated with all employee data and loaded into the LMIS. By selecting Import From Excel an window will appear prompting the user to select the completed document to be loaded. Please note the that only data that is fully compliant with the requirements of the system will be imported, any errors will automatically be regected and the template will need to be editted and saved before importing again. Once a document has been imported a Log File will be generated that can be downloaded (green button) this will list which lines of data have errors preventing import, and what colum the error exists on for the user to correct.

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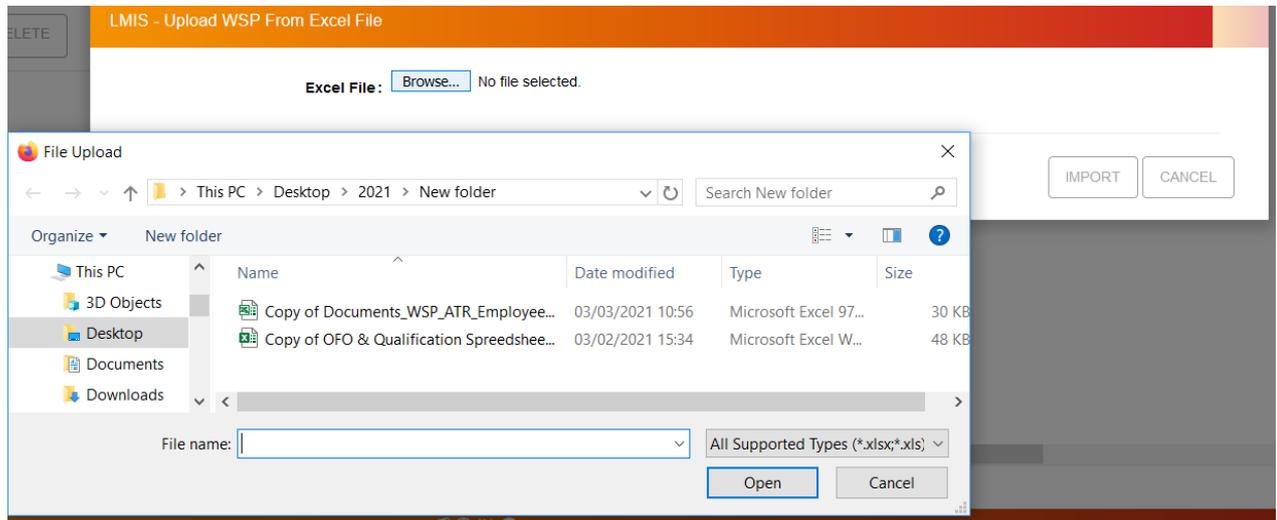
Any options provided on the excel template need to be used, only fields indicated as text fields are not limitted to the preselected options.

Delete All Employees, this option can be selected in order to clear all employee data from the submission.

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Interventions and Classes

1. Click Interventions, select an option for the intervention (WSP or ATR) and complete the required information
2. Create a new Intervention and save it
3. Click to Create New Class
4. Choose the intervention from the list of interventions that have been added (via the WSP and ATR options)
5. Choose a name for the class (can use the same as the intervention name it is relating to)
6. Intervention Status will be Planned if WSP only and Achieved and Enrolled for ATR
7. Click Save and the list of classes should be listed at the bottom of the screen (under the intervention capturing window)

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LMIS - Capture WSP Intervention

○ **WSP**   ○ **ATR**

Intervention No.:	Intervention Title:
Band Level: -- type and/or select --	Intervention Type: -- type and/or select --
Intervention Level: -- type and/or select --	Intervention Cost: 0 SAQA ID.:
Invoice No.:	No. of staff that received the training: 0 Duration of training(Days): 0
Accreditation No.:	Training Provider:
ETQE: -- type and/or select --	

Offered Externally ? : ☐   PIVOTAL ? : ☐   Apply Discretionary ? : ☐

Supporting Documents: [SELECT FILES...]

Create Date: 0001-01-01	Last Update Date:
Create User:	Last Update User:

[Save] [Cancel]

Document Name	Verified	Remediation

Enrol Intervention Class

LMIS - Create New Intervention Class

Class Name:	Intervention: -- type and/or select --
Appointment Section: -- type and/or select --	Intervention Status: -- type and/or select --
Learning Mode: -- type and/or select --	
Start Date: 0001-01-01	End Date: 0001-01-01

Create Date: 2021-03-05	Last Update Date:
Create User: WSP2021TEST	Last Update User:

[Save] [Cancel]

8. Scroll down and click Enrol Class, a window should open with information on the intervention and the list of all employees added on the employee page
9. Select the employee/s that have attended the training (ATR) or will attend the training (WSP) the status should be automatically given from which option the intervention was added using (WSP or ATR)

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10. Employee will be loaded and appear on the Employee intervention page for information purposes, the number on the submit page summary should also increase as the employees are linked to training.

Training Completed and Planned

1. The training completed ad planned page is where you can see the employees that have been linked to which interventions and whether they are part of the WSP or ATR. The information can not be edited on this tab, the data can be exported to excel using the "Export" option.

2. Before the submission can be completed, the verification Documents for banking details (either a cancelled cheque or formal bank account confirmation letter must be loaded to the documents page. The document type must be selected from the list (Bank confirmation, declaration document, or Proof of Expenditure) and select the relevant document from the location on the SDF's computer using the "select file" option
3. The relevant documents should be saved to the correct document types, and these will appear in the list below once they are added successfully.

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4. If all WSP and ATR data has been loaded and the 3 documents have been saved the SDF can proceeds to the Submit page. This gives a brief summary of the employees, interventions and the WSP / ATR entries

5. The draft WSP/ATR report can be printed from the "Print WSP and ATR" button on the page.

6. If all data is in order and no amendments need to be made, the SDF can confirm the submission by clicking the "Submit" button, a prompt will appear requesting the SDF to confirm the submission again, as no information can be edited from this point.

7. An email addressed to the SDF, including the SDL number will be automatically sent to the SDF to confirm the SSETA has received the submission.

Applying for Extension Requests

- All late submission applications must be submitted online via the LMIS
- In order to access the extension request tab the company must register their SDF and company details
- Applications for an extension is subject to approval by the SSETA Accounting Authority
- All applications must be submitted on or before 30 April
- approved extension may not exceed one month from the deadline date (Extension Deadline 31 May)

1. Navigate to the WSP Summary Page
2. After the Main company details have been saved and the company appears here, the Request WSP Extension option will appear on the far-right hand side of the option menu
3. Click this option to open the Extension request window below

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SERVICES SETA

4. The company details (SDL Number, Registration number, training name) should appear in the window
5. Type in a motivation for why the extension is needed in the motivation window
6. In the authorisation letter section, a formal extension request letter, on a company letter head (of the applicant) and signed should be uploaded.
7. Click the "Add" button to request an extension for this company with the loaded details, and the request should appear in the table below the "Add" button