
MANDATORY GRANT WSP/ATR SDF USER MANUAL

Mandatory Grant WSP/ATR SDF User Manual

January 31, 2024

Loise Kubayi



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1. Application Link

Click here for the test link.

Login Screen



2. Registering a New User

The below login screen will appear,

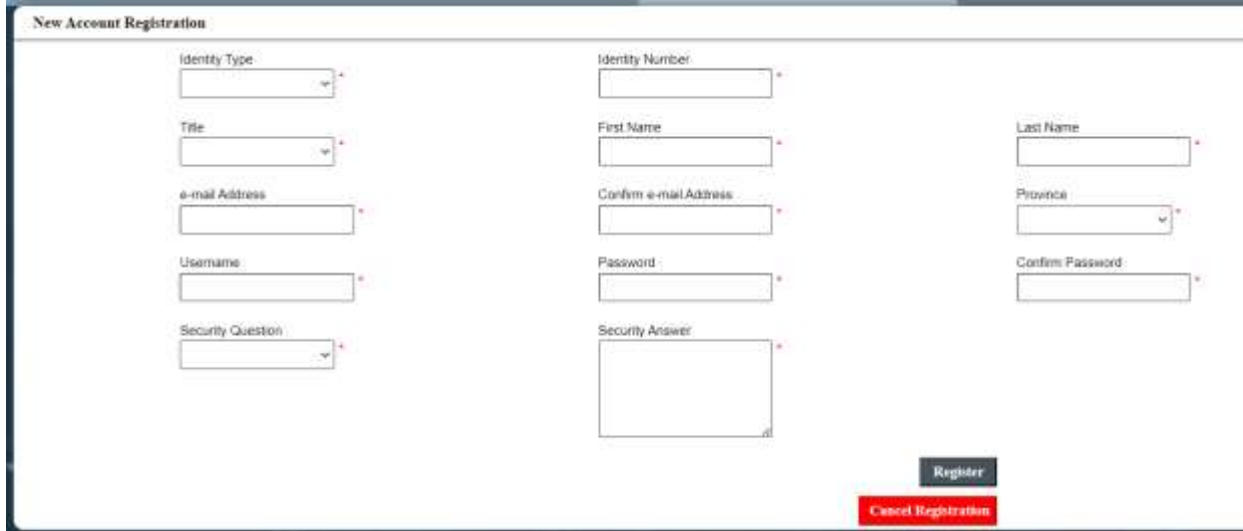
The icons highlighted in yellow below are links to an online User Manual and training video – How to create your user account (YouTube video).



Click on Register a New Account.



Complete all the required fields. * Indicates that the fields are compulsory and that you will not be able to proceed if the fields are not completed

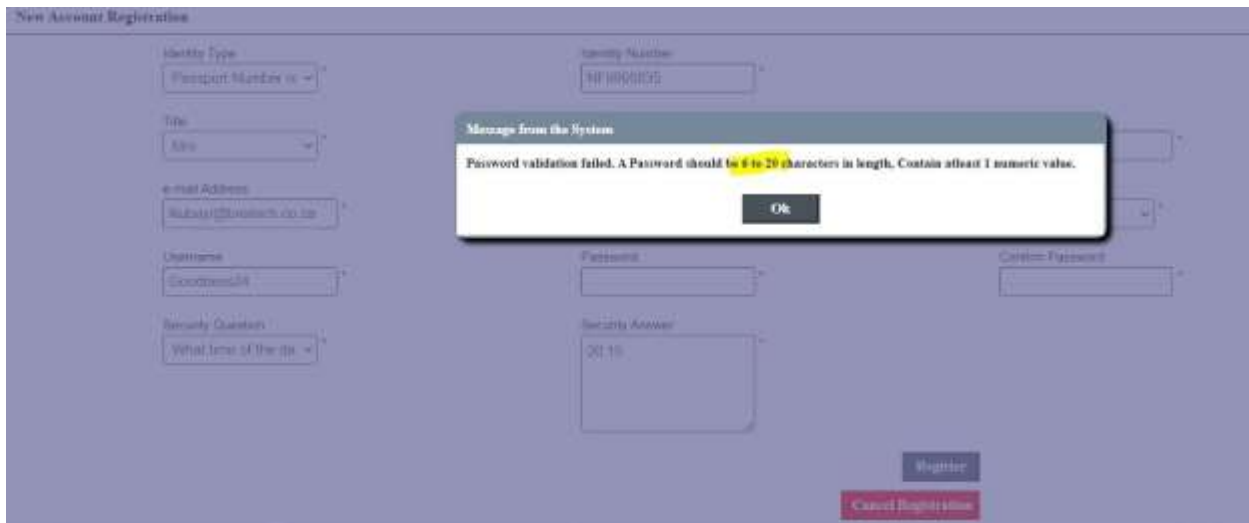


The form is titled "New Account Registration" and contains the following fields:

- Identity Type (dropdown menu)
- Identity Number (text input)
- Title (dropdown menu)
- First Name (text input)
- Last Name (text input)
- e-mail Address (text input)
- Confirm e-mail Address (text input)
- Province (dropdown menu)
- Username (text input)
- Password (text input)
- Confirm Password (text input)
- Security Question (dropdown menu)
- Security Answer (text area)

Buttons: Register, Cancel Registration

IMPORTANT – Password should be 6-20 characters long and should have special characters such as ! @#\$% as well as numeric numbers



The form is titled "New Account Registration" and contains the following fields:

- Identity Type (dropdown menu: Passport Member)
- Identity Number (text input: NF1000000)
- Title (dropdown menu: Sir)
- First Name (text input)
- Last Name (text input)
- e-mail Address (text input: Nubate@browtech.co.za)
- Confirm e-mail Address (text input)
- Province (dropdown menu)
- Username (text input)
- Password (text input)
- Confirm Password (text input)
- Security Question (dropdown menu: What time of the day)
- Security Answer (text area: 00:15)

Buttons: Register, Cancel Registration

Message from the System
Password validation failed. A Password should be 6 to 20 characters in length. Contain atleast 1 numeric value.
Ok

Once all the required fields have been completed click on REGISTER



IMPORTANT! YOUR NAME & SURNAME NEEDS TO BE CAPTURED EXACTLY AS PER YOUR ID DOCUMENT

New Account Registration

Identity Type Passport Number or *	Identity Number NF3905835 *	
Title *	First Name Goodness *	Last Name Smith *
e-mail Address lkubayi@breitech.co.za *	Confirm e-mail Address lkubayi@breitech.co.za *	Province *
Username Goodness24 *	Password ***** *	Confirm Password ***** *
Security Question What time of the da *	Security Answer 20:15 *	

Register

Cancel Registration

The below system-generated message will pop up, indicating you have successfully registered.





When you are done with your registration you will receive an email from noreply@teta.org.za with your username and encrypted password.

Clarity SETA System Account Registration



noreply@teta.org.za
To: Loise Kubayi



Tue 1/9/2024 9:2

Dear Goodness Smith

Thank you for registering an account on TETA Clarity 4.0 MIS Administrator. Your account has been created successfully and should be able to access the Portal.

Your Login Details are as follows:

Username: Goodness24
Password: *****

Please use your username and the password you supplied to login into the system.

Kind Regards

TETA Clarity 4.0 Management Information System



Transport Education Training Authority
Driven by Vision

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

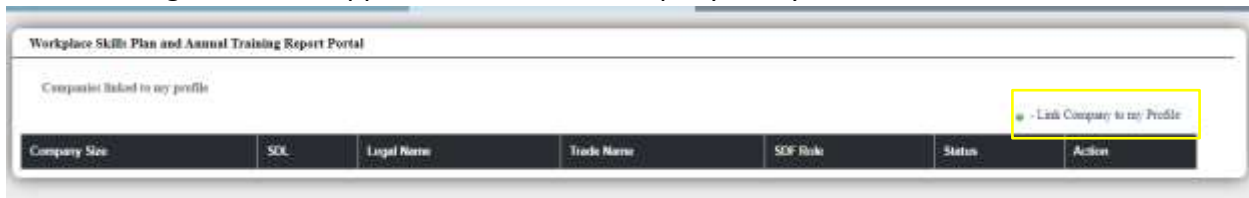
3. Stakeholder Login

Login as a stakeholder using your credentials. If you are not registered, then you should register as a user first before you apply to be a registered SDF.

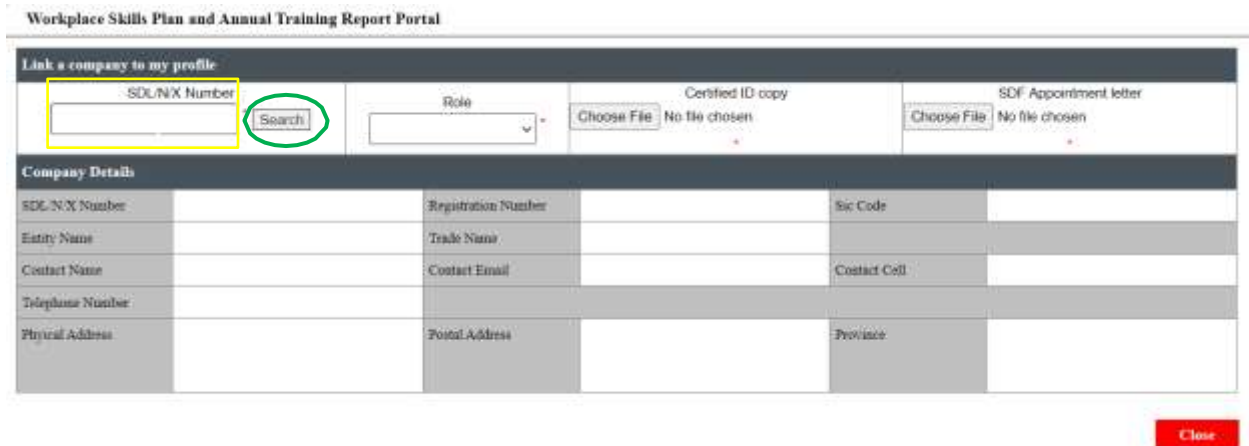
Once you have logged in, the following screen will appear and click on “I am applying to be registered SDF of the company.”



The following screen will appear, click on Link Company to my Profile.



The following screen will appear, Type in the SDL/N/X number and click on the search button.



Select role – Remember **ONLY** one Primary SDF role can be selected.

- Primary SDF
- Secondary SDF
- Admin

Once you have entered your SDL/N/X number and clicked on the search functionality, the company details/Information will appear.

- * **Select** the role for which you are applying.
- * **Choose** where you have saved your certified ID copy and upload it.
- * Choose where you have saved your SDF appointment letter and upload it.

When all has been completed **click on Link company** at the bottom of the screen as indicated below.

Workplace Skills Plan and Annual Training Report Portal

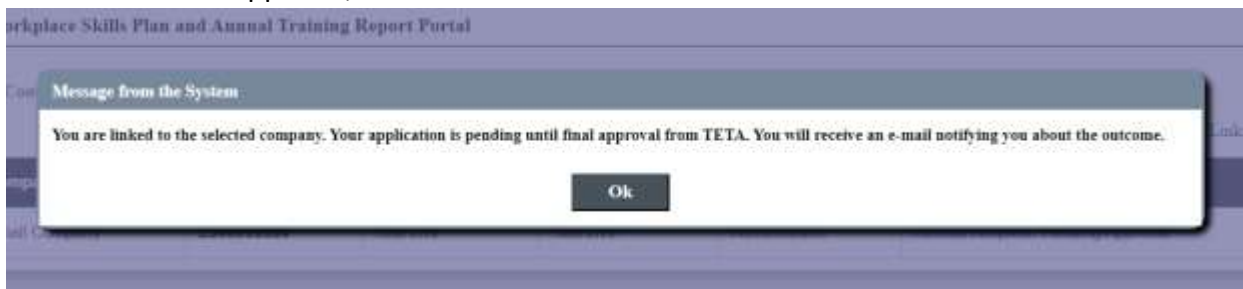
Link a company to my profile

SDLN/X Number: L000000000 Role: Primary SDF Certified ID copy: Choose File admission letter pdf SDF Appointment letter: Choose File admission letter pdf

Company Details

SDLN/X Number	L000000000	Registration Number	2003/3333434/55	Site Code	71221 TAXIS
Entity Name	Test Live	Trade Name	Test Live		
Contact Name	Claudia	Contact Email	info@breitech.co.za	Contact Cell	0827288122
Telephone Number	0115555555				
Physical Address	12 new Newtown Johannesburg 0912	Postal Address	12 new Newtown Johannesburg 2113	Province	Gauteng

A system message will appear that you have been linked to a company but need to wait for TETA for approval, then click OK.



You will receive an email informing you that you have requested to link your profile to a company.

Profile Link Request

 noreply@teta.org.za
To: Loise Kubayi

Wed 1/10/2024 7:55

10 January 2024

Dear Goodness Smith

L000000000
Test Live

Your request to link your profile to Company Test Live on the TETA Portal has been sent to TETA for approval. Please note that you will receive an email notification once TETA has evaluated your application to link your profile to the company.

Kind Regards



For existing SDF your Status will be Resubmit where you will be required to submit your appointment which is date from the 1 February 2024.

You will click on Open to be able to resubmit.

Workplace Skills Plan and Annual Training Report Portal

Companies linked to my profile + Link Company to my Profile

Company Size	SDL	Legal Name	Trade Name	SDF Role	Status	Action
Large Company	L650717079	Demo Company	Demo Company	Primary SDF	Access Granted	Open
Small Company	L000000000	Test Live	Test Live	Administrator	Resubmit	Open

The following screen will appear, you will see that your ID copy from the previous year is there, where you can click on the link to view/download the file. Click on choose File to upload the new appointment letter.

Workplace Skills Plan and Annual Training Report Portal

Organization link properties

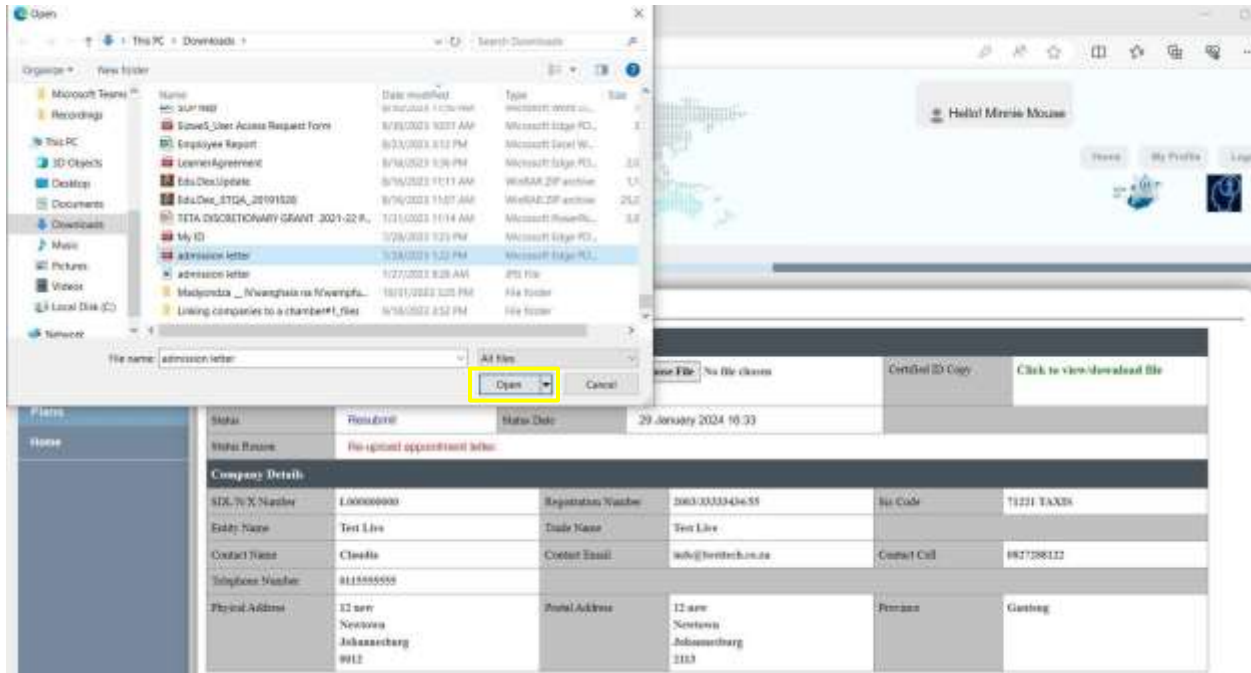
SDF Function	Administrator	SDF Appointment letter	Choose File No file chosen	Certified ID Copy	Click to view/download file
Status	Resubmit	Status Date	29 January 2024 16:33		
Status Reason	No upload appointment letter				

Company Details

SDL/IX Number	L000000000	Registration Number	20653535345455	Bic Code	71221 TAXIS
Entity Name	Test Live	Trade Name	Test Live		
Contact Name	Claudia	Contact Email	info@breitech.co.za	Contact Cell	0827288122
Telephone Number	0115555555				
Physical Address	12 new Newtown Johannesburg 0812	Postal Address	12 new Newtown Johannesburg 2113	Province	Gauteng

De-link Resubmit
Close

You will select the file you want to upload and click on Open.



The file name will appear next to the choose file button and click on Resubmit.

You will receive an email stating that you have submitted your application, and you will receive an email from TETA once done with the evaluation process.

Workplace Skills Plan and Annual Training Report Portal

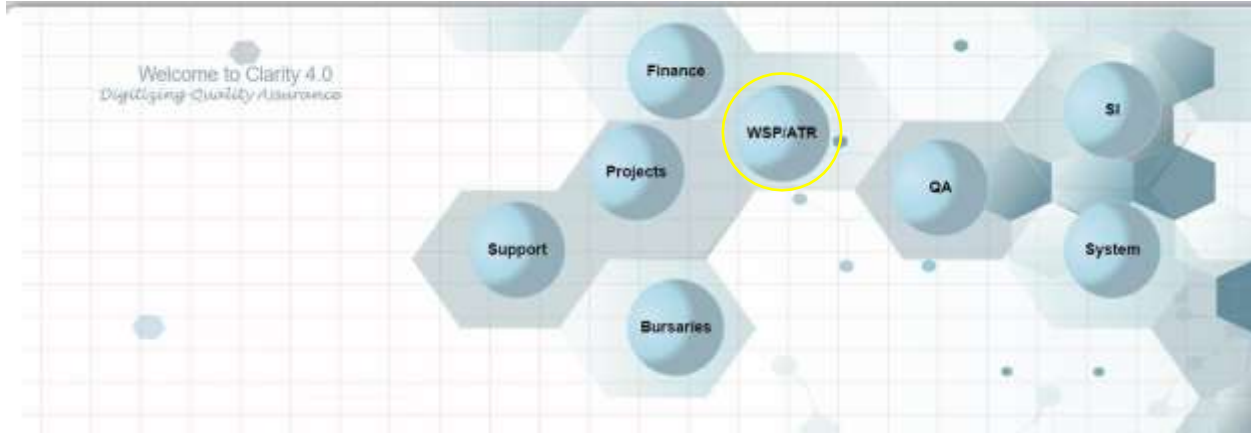
Organisation link properties					
SDF Function	Administrator	SDF Appointment letter	Choose File	admission letter.pdf	Certified ID Copy
					Click to view/download file
Status	Resubmit	Status Date	29 January 2024 16:33		
Status Reason	Re-upload appointment letter				
Company Details					
SDL N X Number	180000000	Registration Number	2063333343455	Sic Code	71221 TAXIS
Entity Name	Test Live	Trade Name	Test Live		
Contact Name	Claudia	Contact Email	info@breitech.co.za	Contact Cell	0827288122
Telephone Number	0115555555				
Physical Address	12 new Newtown Johannesburg 0012	Postal Address	12 new Newtown Johannesburg 2113	Province	Gauteng



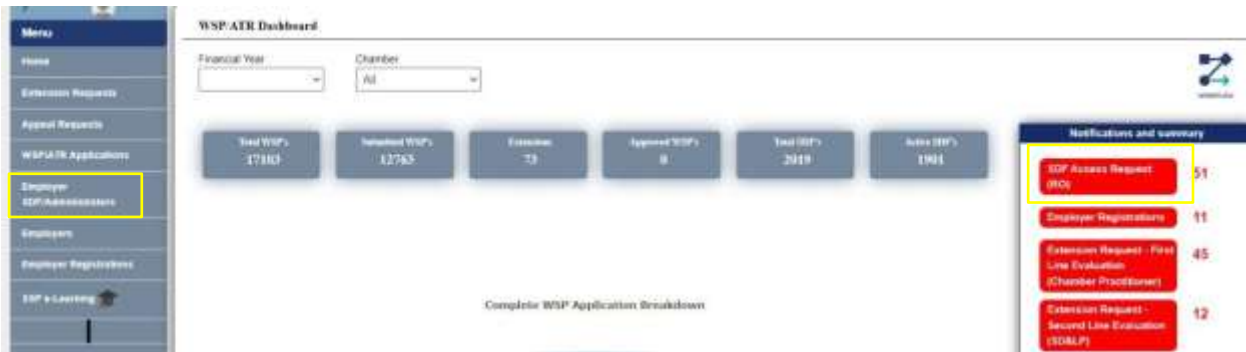
The link company request will be sent to TETA for verification and approval.

A TETA agent will login and verify your application.

The landing page will appear, and they will click on WSP/ATR module.



The following dashboard will appear, click on either Employer SDF/administrators or SDF Access Request (RO).



The following screen will open, and the application will appear showing it Pending approval, the click on Open.

Total Administrators: 1

Chamber	Entity Name	SDL	Registration Number	First Name	Last Name	ID Number	Role	Status	Status Date	Working Days	
Maritime Chamber	Test Live	L000000000	2003/33333434/55	Goodness	Smith	NF9605835	Administrator	Access Request Pending Approval	10 Jan 2024 07:54	1	Open

This screen will open, and the TETA agent will be able to view the applicant's profile and all the attachments.

Employer Administrators/SDF



Goodness Smith

- - Close
- - Approve
- - Query Application

SDF Access		Profile		History	
Link Properties					
Link Status	Access Request, Pending Approval	Status Reason			
Status Date	10 January 2024 07:54	Last User Status Update			
SDF Function	Administrator	SDF Appointment letter	Click to view/download File	Certified ID Copy	Click to view/download File
Organisation Details					
SDL N.O	L00000000	Entry Name	Test Live	Trade Name	Test Live
Registration Number	2005-33333434/55	Sic Code	13100	Chamber	Maritime Chamber
Contact Name	Maphuti	Contact Email	MaphutiC@teta.org.za	Contact Cell	0710021582
Phone Number	0115555555				

Should all be in order click on approve or query applications should ID copy or SDF appointment letter is not in order.

Employer Administrators/SDF



Goodness Smith

- - Close
- - Approve
- - Query Application

SDF Access		Profile		History	
Link Properties					
Link Status	Access Request, Pending Approval	Status Reason			
Status Date	10 January 2024 07:54	Last User Status Update			
SDF Function	Administrator	SDF Appointment letter	Click to view/download File	Certified ID Copy	Click to view/download File
Organisation Details					
SDL N.O	L00000000	Entry Name	Test Live	Trade Name	Test Live
Registration Number	2005-33333434/55	Sic Code	13100	Chamber	Maritime Chamber
Contact Name	Maphuti	Contact Email	MaphutiC@teta.org.za	Contact Cell	0710021582
Phone Number	0115555555				

If the attached documents are not in order, the agent can click on query application and a pop-up screen will appear and they will write a reason as to why they are querying the application.

Administrators/SDF

Access Decline Reason

Reason

SDF appointment letter is not in order.


Submit

Cancel

Access Request. Pending Approval	Status Reason	
10 January 2024 07:54	last User Status Update	

The Link status will change to Access Query and the status reason will also appear. And click on Close.

Employer Administrators/SDF



Goodness Smith

Close

SDF Access

Profile

History

Link Properties					
Link Status	Access Query	Status Reason	SDF appointment letter is not in order.		
Status Date	10 January 2024 08:31	Last User Status Update			
SDF Function	Administrator	SDF Appointment letter	Click to view/download File	Certified ID Copy	Click to view/download File

The SDF will receive the following email from TETA about their application being queried and the reason.



Portal Access Queried



noreply@teta.org.za
To: Loise Kubayi

Reply
 Reply All
 Forward

Wed 1/10/2024 8:32 AM

10 January 2024

Dear Goodness Smith

L000000000
Test Live

We regret to inform you that your access to the system to complete the MG Application on the TETA Portal has been put in query status. Please find the reason below from the administrator

SDF appointment letter is not in order.

Kindly log back onto the system to de-link the queried company to be able to re-submit the corrected document (s).

Kind Regards

TETA Clarity 4.0 Management Information System

Once the SDF has de-linked the queried company and re-submitted the correct documentation, they will receive another email that they have requested to be linked to a company.

Now a TETA agent can login again and approve the application. Upon approval of the access request, the SDF will receive an email that the company is now linked to them.

TETA Company Link Access Approved



noreply@teta.org.za
To: Loise Kubayi

Reply
 Reply All
 Forward

Wed

10 January 2024

L000000000
Test Live

Dear Goodness Smith

We are happy to inform you that your request to access the TETA Portal has been Approved for the organisation above.

Kind Regards

The SDF log back into the system to continue with the Mandatory grant and click on access and work as the company-appointed SDF.



The company that is approved and linked to your profile will appear under your profile with the approval status.

Workplace Skills: Plan and Annual Training Report Portal

Companies linked to my profile - Link Company to my Profile

Company Size	SDL	Legal Name	Trade Name	SDF Role	Status	Action
Small Company	L00000000	Test Live	Test Live	Administrator	Access Granted	Open

Click on the Open button and click on the create new application button.

Workplace Skills: Plan and Annual Training Report Portal

Companies linked to my profile - Link Company to my Profile

Company Size	SDL	Legal Name	Trade Name	SDF Role	Status	Action
Small Company	L00000000	Test Live	Test Live	Administrator	Access Granted	Open

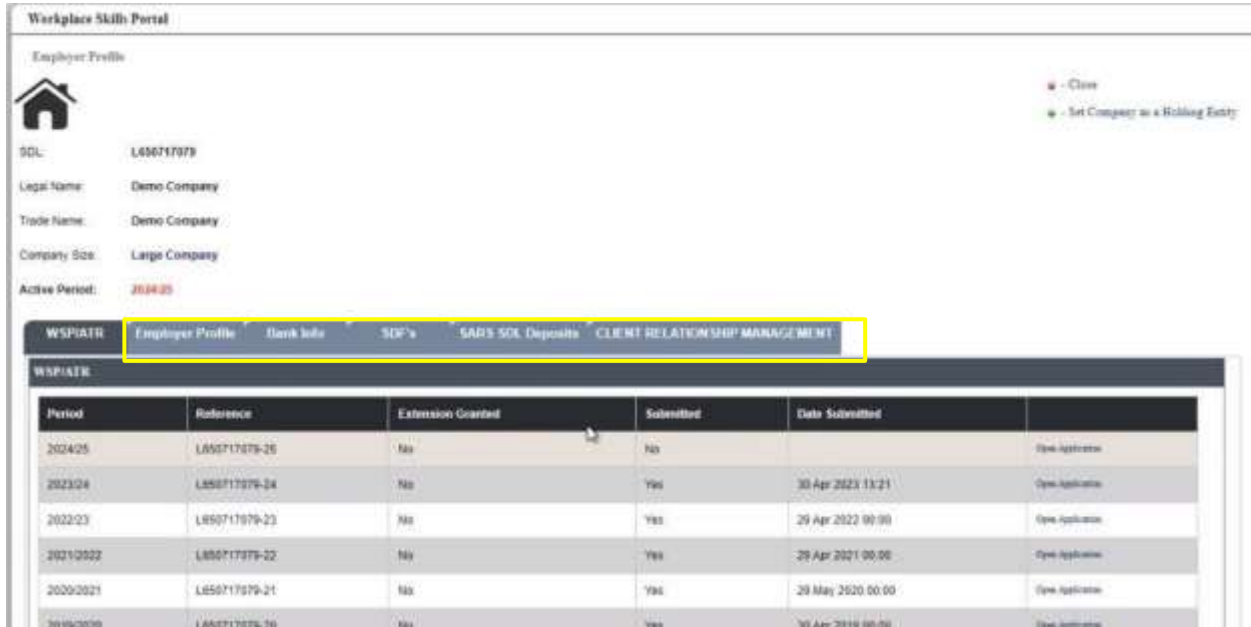


This pop-up screen will open, and you will ask if you are transferring from another SETA and which forms you want to submit.

When you select No you not transferring from another SETA. The SDF has an option to select whether its ATR only, WSP/ATR or WSP only forms you would like to submit.

Select WSP/ATR and click on Create Application.

Once done, the following screen will open, you will have the following TABs: Employer Profile, Bank Info and SDF's that you will populate within the WSP/ATR forms that TETA has provided. You also have the SARS SDL Deposits and CRM tabs which you can view.



The screenshot shows the 'Workplace Skills Portal' interface. At the top, there are navigation tabs: WSP/ATR, Employer Profile, Bank Info, SDF's, SARS SDL Deposits, and CLIENT RELATIONSHIP MANAGEMENT. The 'Employer Profile' tab is active. Below the tabs, there is a table with the following data:

Period	Reference	Extension Granted	Submitted	Date Submitted	
2024/25	LA50717079-25	No	No		Open Application
2023/24	LA50717079-24	No	Yes	30 Apr 2023 13:21	Open Application
2022/23	LA50717079-23	No	Yes	29 Apr 2022 00:00	Open Application
2021/2022	LA50717079-22	No	Yes	29 Apr 2021 00:00	Open Application
2020/2021	LA50717079-21	No	Yes	29 May 2020 00:00	Open Application
2019/2020	LA50717079-20	No	Yes	30 Apr 2019 00:00	Open Application

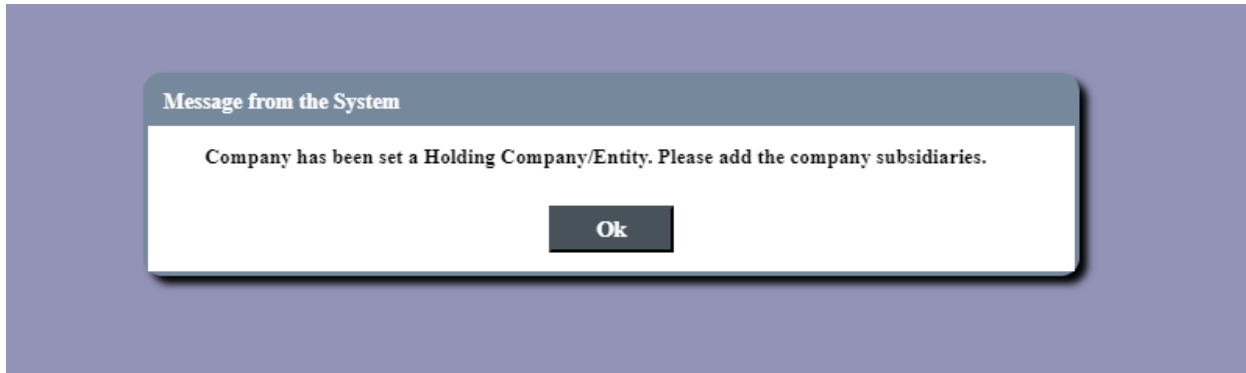
You have a option to make the company a Holding Entity (Parent Company). Click on Set Company as a Holding Entity.



This screenshot is similar to the previous one, but with a yellow box highlighting the 'Set Company as a Holding Entity' option in the top right corner of the Employer Profile section.



A message from the system will pop up telling you that you company is been set a Holding Company and click on Okay.



You will now have an option to add a subsidiary Company, which a new tab will be added named Subsidiary Entities.

Workplace Skills Portal

Employer Profile

Home icon

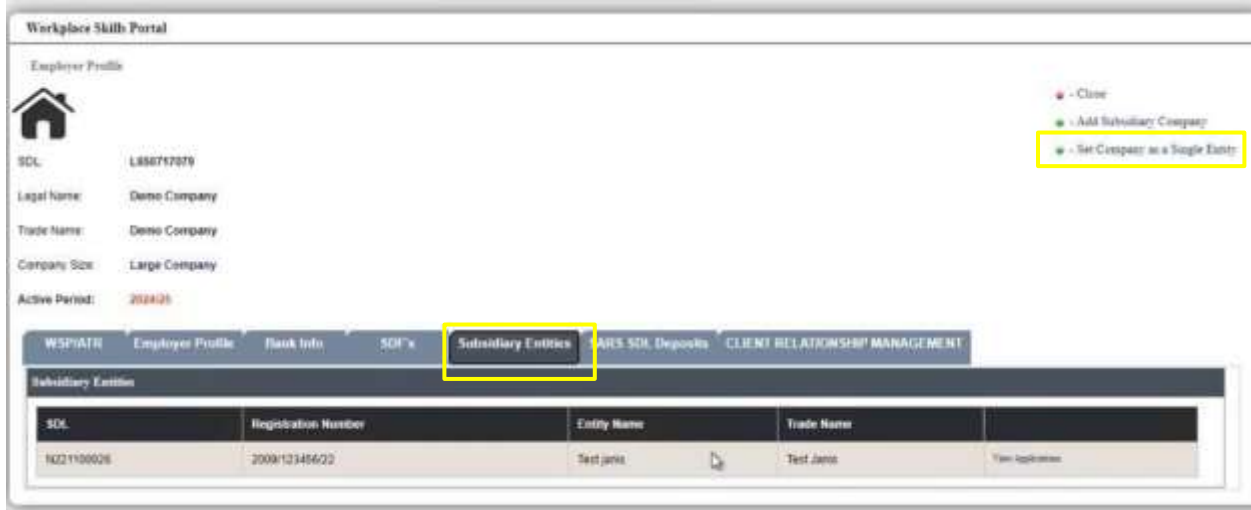
Close icon

SDL: L650717079
 Legal Name: Demo Company
 Trade Name: Demo Company
 Company Size: Large Company
 Active Period: 2024/25

WSP/ATR | Employer Profile | Bank Jobs | SDF's | **Subsidiary Entities** | SARS SDL Deposits | CLIENT RELATIONSHIP MANAGEMENT

Period	Reference	Extension Granted	Submitted	Date Submitted	
2024/25	L650717079-25	No	No		Open Application
2023/24	L650717079-24	No	Yes	30 Apr 2023 13:21	Open Application
2022/23	L650717079-23	No	Yes	29 Apr 2022 00:00	Open Application
2021/2022	L650717079-22	No	Yes	29 Apr 2021 00:00	Open Application
2020/2021	L650717079-21	No	Yes	29 May 2020 00:00	Open Application

Click on the Subsidiary Entities tab, and the below will open where you have the option to view your application, if your organization does not have subsidiary companies then you can click on Set Company as a Single Entities.



Workplace Skills Portal

Employer Profile

Home icon

Close icon

Add Subsidiary Company icon

Set Company as a Single Entity icon

SDL: L650717079

Legal Name: Demo Company

Trade Name: Demo Company

Company Size: Large Company

Active Period: 2024/25

WSP/ATR | Employer Profile | Bank Info | SDF's | **Subsidiary Entities** | SARS SDL Deposits | CLIENT RELATIONSHIP MANAGEMENT

Subsidiary Entities

SDL	Registration Number	Entity Name	Trade Name	Type Application
NZ21100026	200912345672	Test Jans	Test Jans	Type Application

Once done, the Subsidiary Entities Tab will not be available.



Workplace Skills Portal

Employer Profile

Home icon

Close icon

Set Company as a Holding Entity icon

SDL: L650717079

Legal Name: Demo Company

Trade Name: Demo Company

Company Size: Large Company

Active Period: 2024/25

WSP/ATR | Employer Profile | Bank Info | SDF's | SARS SDL Deposits | CLIENT RELATIONSHIP MANAGEMENT

WSP/ATR:

Period	Reference	Extension Granted	Submitted	Date Submitted	Type Application
2024/25	L650717079-25	No	No		Type Application
2023/24	L650717079-24	No	Yes	30 Apr 2023 13:21	Type Application
2022/23	L650717079-23	No	Yes	28 Apr 2022 00:00	Type Application
2021/2022	L650717079-22	No	Yes	29 Apr 2021 00:00	Type Application

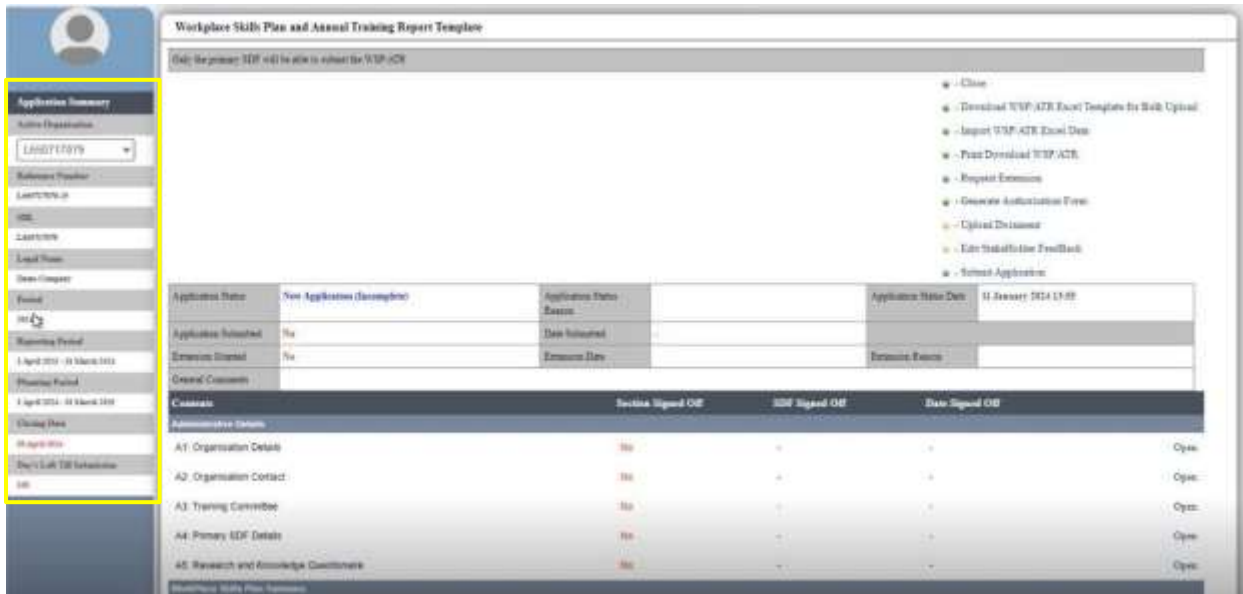
Now you will click on WSP/ATR tab and click on Open Application.



The screenshot shows the 'Workplace Skills Portal' interface. At the top, there's an 'Employer Profile' section with a home icon and a 'Close' button. Below it, company details are listed: SDF: L650717079, Legal Name: Demo Company, Trade Name: Demo Company, Company Size: Large Company, and Active Period: 2024/25. A navigation bar includes 'WSP/ATR', 'Employer Profile', 'Bank Info', 'SDF's', 'SANS SCL Deposits', and 'CLIENT RELATIONSHIP MANAGEMENT'. The 'WSP/ATR' section contains a table with columns: Period, Reference, Extension Granted, Submitted, Date Submitted, and an 'Open Application' button highlighted in yellow.

Period	Reference	Extension Granted	Submitted	Date Submitted	Open Application
2024/25	L650717079-25	No	No		Open Application
2023/24	L650717079-24	No	Yes	31 Apr 2023 13:21	Open Application
2022/23	L650717079-23	No	Yes	29 Apr 2022 00:00	Open Application
2021/2022	L650717079-22	No	Yes	29 Apr 2021 00:00	Open Application

The following screen will open, where on the left side you will have the application summary. You will find the application closing date, how many days left till the application closes, the reporting period and the planning period for the application.



The screenshot shows the 'Workplace Skills Plan and Annual Training Report Template' interface. On the left, there's a sidebar with 'Application Summary' highlighted in yellow. The main area shows a table with application details and a list of tasks on the right.

Application Status	Yes Application (Assessment)	Application Status - Errors	Application Status Date
Application Submitted	No	Date Submitted	
Extension Granted	No	Extension Date	

Criteria	Section Signed Off	SDF Signed Off	Date Signed Off
A1. Organisation Details	No	-	-
A2. Organisation Contact	No	-	-
A3. Training Committee	No	-	-
A4. Primary SDF Details	No	-	-
A5. Research and Knowledge Conditions	No	-	-

If you are an SDF for multiple companies, you will have a drop down to select the company you want to apply to the WAP/ATR for.

On the right side of the screen, you have options to download the WSP/ATR excel template for bulk upload, Importing the WSP/ATR excel data, printing the WSP/ATR, requesting for Extension, generating authorization form, upload documents, edit stakeholder feedback and the submit button.

We have a note that informs the SDF's that only the primary SDF will be able to submit the WSP/ATR forms, the secondary SDF and the Administrator will only be able to edit the forms but can't submit.

Workplace Skills Plan and Annual Training Report Template

Only the primary SDF will be able to submit the WSP/ATR

- Close
- Download WSP/ATR Form Template for Web Upload
- Import WSP/ATR Excel Data
- Print Download WSP/ATR
- Request Extension
- Generate Authorisation Form
- Upload Document
- Edit Stakeholder Feedback
- Submit Application

Application Status	New Application (Incomplete)	Application Status Reason		Application Status Date	11 January 2024 13:02
Application Submitted	No	Date Submitted	-		
Extension Granted	No	Extension Date		Extension Reason	

Sections	Section Signed Off	SDF Signed Off	Date Signed Off	
Administrative Details				
A1: Organisation Details	No	-	-	Open
A2: Organisation Contact	No	-	-	Open
A3: Training Committee	No	-	-	Open
A4: Primary SDF Details	No	-	-	Open
A5: Research and Knowledge Questionnaire	No	-	-	Open
Workplace Skills Plan Summary				
2.02: Employment Summary	No	-	-	Open
2.03: Employment Provincial Profile	No	-	-	Open
2.07: Planned Beneficiaries of Training	No	-	-	Open
2.08: Planned Training Per Intervention	No	-	-	Open
2.09: Planned Training Budget	No	-	-	Open
Annual Training Report				
1.1: Number of Actual Beneficiaries	No	-	-	Open
1.2: Beneficiaries Completed Training Per Intervention	No	-	-	Open
1.3: Impact Assessment	No	-	-	Open

Document Title	Document Description	Document Compulsory	
Signed Authorisation Form for small, medium and large - compulsory	Signed Authorisation Form for small, medium and large - compulsory	Compulsory	File Not uploaded
Training Committee minutes (Not required for small companies) Compulsory form medium and large	Training Committee minutes (Not required for small companies) Compulsory form medium and large	Compulsory for medium and large	File Not uploaded

Below is the list of forms for the WSP/ATR submission, if you submitted your WSP/ATR the previous years, you would notice that we have less forms than the previous years, there are some that are no longer part of the forms that need to be submitted. (Form A6, WSP 2.04,2.10, 2.11 and ATR 1.5, 1.6)

Application Status	New Application (Incomplete)	Application Status Reason		Application Status Date	10 January 2024 10:06
Application Submitted	No	Date Submitted	-		
Extension Granted	No	Extension Date		Extension Reason	

Sections	Section Signed Off	SDF Signed Off	Date Signed Off	
Administrative Details				
A1: Organisation Details	No	-	-	Open
A2: Organisation Contact	No	-	-	Open
A3: Training Committee	No	-	-	Open
A4: Primary SDF Details	No	-	-	Open
A5: Research and Knowledge Questionnaire	No	-	-	Open
Workplace Skills Plan Summary				
2.02: Employment Summary	No	-	-	Open
2.03: Employment Provincial Profile	No	-	-	Open
2.07: Planned Beneficiaries of Training	No	-	-	Open
2.08: Planned Training Per Intervention	No	-	-	Open
2.09: Planned Training Budget	No	-	-	Open
Annual Training Report				
1.1: Number of Actual Beneficiaries	No	-	-	Open
1.2: Beneficiaries Completed Training Per Intervention	No	-	-	Open
1.3: Impact Assessment	No	-	-	Open

Document Title	Document Description	Document Compulsory	
Signed Authorisation Form for small, medium and large - compulsory	Signed Authorisation Form for small, medium and large - compulsory	Compulsory	File Not uploaded
Training Committee minutes (Not required for small companies) Compulsory form medium and large	Training Committee minutes (Not required for small companies) Compulsory form medium and large	Compulsory for medium and large	File Not uploaded

Administrative Details. Form A1, Organization Details.

Click on Open.

Application Status	New Application (Incomplete)	Application Status Review		Application Status Date	11 January 2024 12:33
Application Submitted	No	Date Submitted	-		
Extension Granted	No	Extension Date		Extension Review	
General Comments					
Coaches		Timeline Signed Off	SDF Signed Off	Date Signed Off	
Administrative Details					
A1: Organization Details	No	-	-	-	Open
A2: Organization Contact	No	-	-	-	Open
A3: Training Committee	No	-	-	-	Open
A4: Priority SDF Details	No	-	-	-	Open
A5: Research and Knowledge Questionnaire	No	-	-	-	Open
Workplace Skills Plan Summary					

The following screen will open, you will see two tabs, for organization details and Bank Info, and on the right side will have buttons to edit the tab fields. Click on Edit Organisation details.

Workplace Skills Plan and Annual Training Report Template

Section	Administrative Details	Form	A1
Form Title	Organization Details		
Section Signed Off	No	SDF Signed Off	-
		Date Signed Off	-
Note	Please note that your organization's banking details appear below, use the current data records for the organization. If these are blank or different, please update, upload, and submit Proof of Banking Details on this page.		

- Close Form
- Edit Organization Details
- Edit Bank Details
- Upload Proof of Banking
- Sign Off Section

Organisation		Bank Info	
SDL	L89717079	Legal Name	Drive Company
Registration number	20119289198	Vic Code	71211 URBAN, SUBURBAN AND INTER-URBAN BUS AND COACH PASSENGER LINES
Contact Person Name	M Simpson	Contact Person e-mail Address	MSimpson@drive.co.au
Contact Person Phone Number	0133333000	Contact Person Cell Number	0833333333
Company Telephone Number	0133333000	Company Web Address	
		Trade Name	Drive Company
		Classification	Road Passenger Coach



The following screen will open, note that the SDL number is grayed out meaning that it can't be edited. You will confirm if the details are the correct and if there are some changes you can edit and click on Save.

Section Signed Off	No	SDL Signed Off	-	Date Signed Off	-
<p>Note: Please note that your organization's banking details appear below, are the correct Teta records for the organization. If these are blank or different, please update, upload, and submit Proof of Banking Details on this page.</p>					
SDL	1856717079	Legal Name	Demo Company	Trade Name	Demo Company
Registration Number	20110188800	SiC Code	71211 URBAN, SOL		
Contact Person Name	M Mhose	Contact Person e-mail Address	Mhoy.mhose@teta.co.za	Contact Person Cell Number	0833333333
Contact Person Phone Number	0133333000				
Telephone Number	0133333000	Web Address			
Physical Address	8 Dream road	Postal Address (Copy Physical Address)	8 Dream road	Province	Gauteng
	Fairbairn		Fairbairn	Municipality	City of Tshwane Mm
	Protea		Protea		
	0081		0081		

Save
Close

It will re-direct to this screen.

Note that since you haven't confirmed the banking details, the field says No and still have the option to Upload banking details.

Workplace Skills Plan and Annual Training Report Template

Section	Administrative Details	Form	AI		
Form Title	Organization Details				
Section Signed Off	No	SDL Signed Off	-	Date Signed Off	-
<p>Note: Please note that your organization's banking details appear below, are the correct Teta records for the organization. If these are blank or different, please update, upload, and submit Proof of Banking Details on this page.</p>					

- Close Form
- Edit Organization Details
- Edit Bank Details
- Upload Proof of Banking
- Sign Off Section

Organization	Bank Info
Bank Name	Capitec Bank
Branch Name	Lynwood
Branch Code	27089
Account Name	Letsame
Account Number	27834552
Account Type	Savings Account
Proof of Account	Click to view file
Confirm Banking Details	No



If you click on Sign off Section without confirming the banking details, you will get the following message from the system. Click on Okay.

	SDF Signed Off	-	Date
--	----------------	---	------

your organization's banking details appear below, are the current Teta records for the
these are bla

Message from the System

Please make sure banking details are confirmed.

Ok

If you need to upload a new proof of banking, click on Upload Proof of Banking.

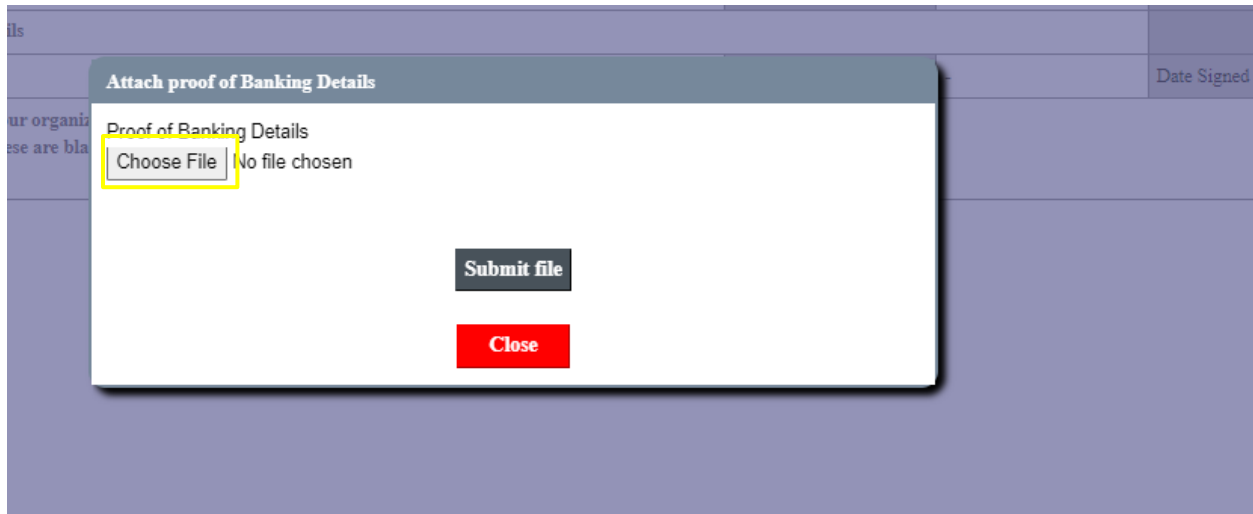
Workplace Skills Plan and Annual Training Report Template

Section:	Administrative Details	Form:	AI
Form Title	Organization Details		
Section Signed Off	No	SDF Signed Off	-
		Date Signed Off	-
Note:	Please note that your organization's banking details appear below, are the current Teta records for the organization. If there are blank or different, please update, upload, and submit Proof of Banking Details on this page.		

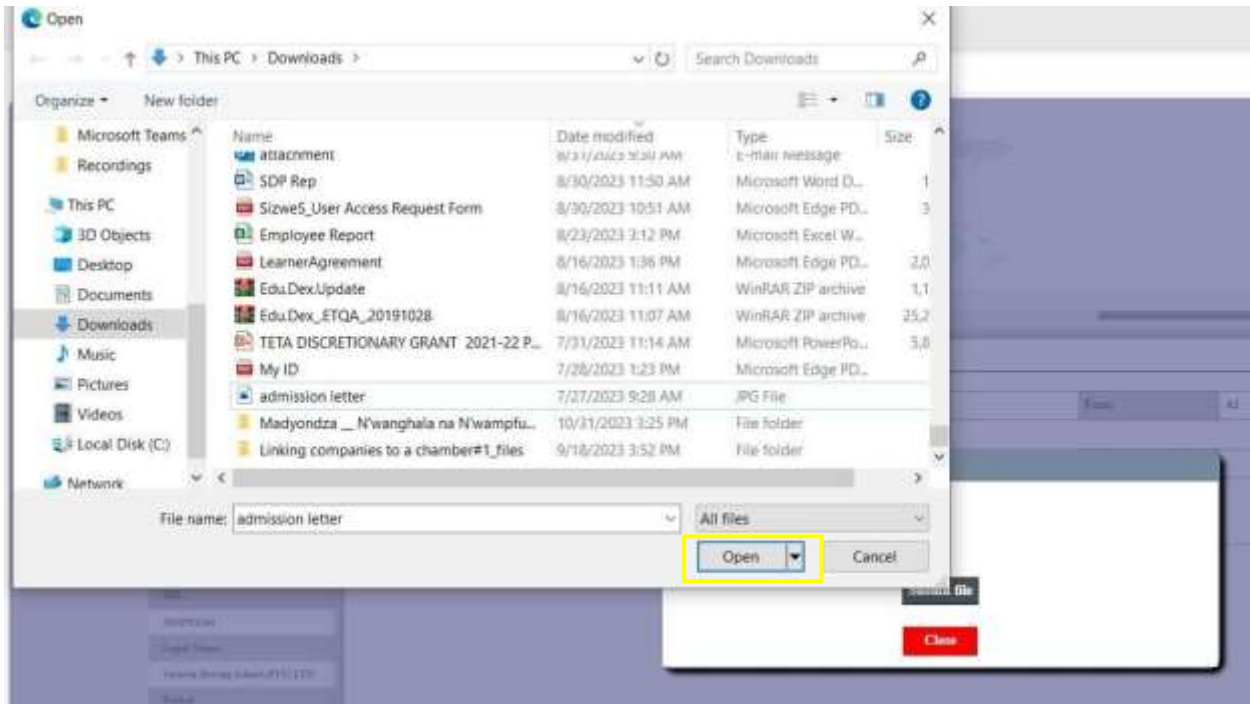
- Close Form
- Edit Organization Details
- Edit Bank Details
- Upload Proof of Banking
- Sign Off Section

Organization	Bank Info
Bank Name	Capitol Bank
Branch Name	Lynnwood
Branch Code	J7088
Account Name	LoisTen
Account Number	27834552
Account Type	Savings Account
Proof of Account	Click to view file
Enroll Banking Details	No

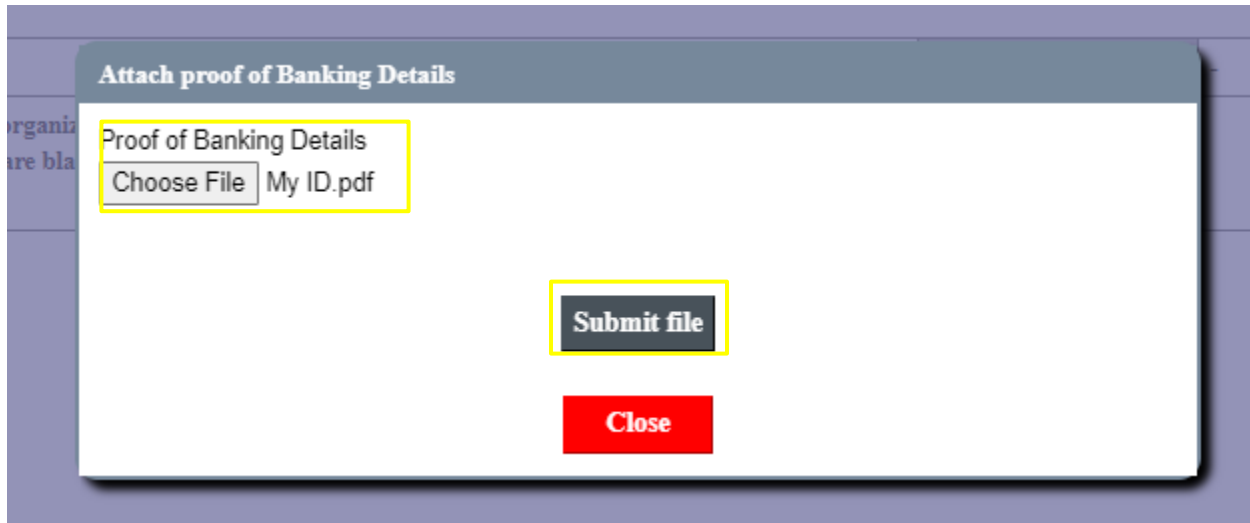
The pop-up will appear and click on the choose file button.



The following pop-up will appear, you will choose the file you want to upload and click on open.



The file name will appear and click on submit file.



The proof of account link will now appear, where you are able to click on the link to view if you uploaded the correct file.

Workplace Skills Plan and Annual Training Report Template

Section	Administrative Details	Form	A1	
Form Title	Organization Details			
Section Signed Off	No	PDF Signed Off	-	Date Signed Off
Note:	Please note that your organization's banking details appear below, are the current Teta records for the organization. If these are blank or different, please update, upload, and submit Proof of Banking Details on this page.			

- - Close Form
- - Edit Organization Details
- - Edit Bank Details
- - Upload Proof of Banking
- - Sign Off Section

Organisation	Bank info
Bank Name	Capital Bank
Branch Name	Lynnwood
Branch Code	47009
Account Name	Lois Test
Account Number	27834532
Account Type	Savings Account
Proof of Account	Click to view file
Confirm Banking Details	No



Click on Edit bank details, to edit and confirm your bank information.

Workplace Skills Plan and Annual Training Report Template

Section:	Administrative Details	Form:	AI	
Form Title:	Organization Details			
Section Signed Off:	No	SDF Signed Off:	-	Date Signed Off:
Note:	Please note that your organization's banking details appear below, are the correct Teta records for the organization. If these are blank or different, please update, upload, and submit Proof of Banking Details on this page.			

- - Close Form
- - Edit Organization Details
- - Edit Bank Details
- - Upload Proof of Banking
- - Sign Off Section

Organisation	Bank Info
Bank Name	Capital Bank
Branch Name	Lynwood
Branch Code	J7009
Account Name	Lolita Jim
Account Number	27834552
Account Type	Savings Account
Proof of Account	Click to view file
Custom Banking Details	No

This screen will open, we have a note which tells you that TETA has the following banking details for the organization, if they are different then update to the correct details. we have a button that once you have confirmed that the banking details are correct you can select yes and after click on Save.

Section:	Administrative Details	Form:	AI	
Form Title:	Organization Details			
Section Signed Off:	No	SDF Signed Off:	-	Date Signed Off:
Note:	Please note that your organization's banking details appear below, are the correct Teta records for the organization. If these are blank or different, please update, upload, and submit Proof of Banking Details on this page.			

Bank:

Branch Name:

Branch Code:

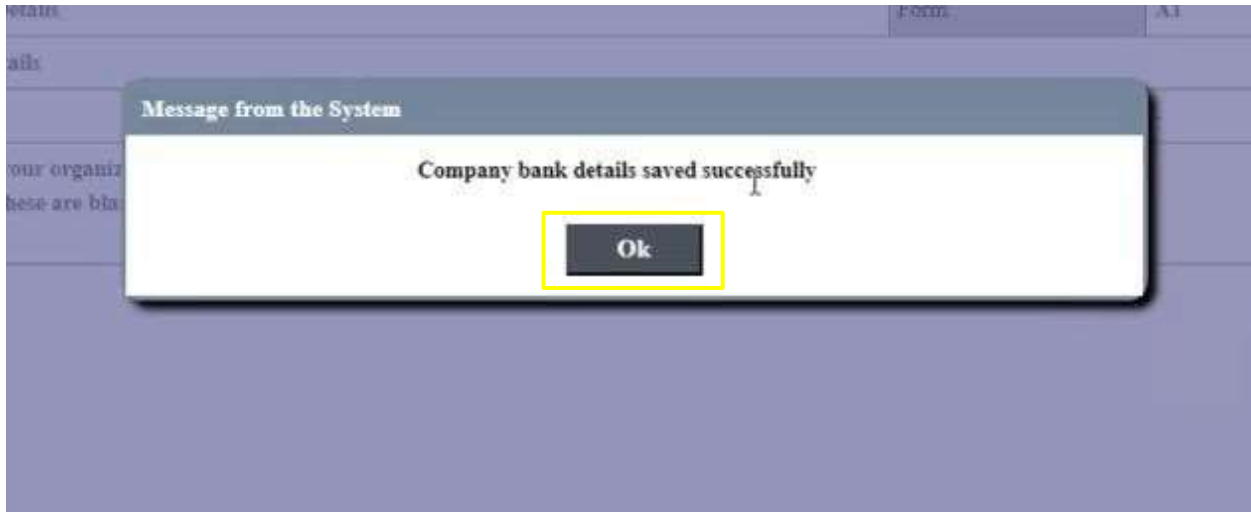
Account Name:

Account Number:

Account Type:

Confirm Banking Details:

A pop-up message from the system, saying the details are saved successfully. Click on Ok



It will direct you to the screen, the confirm banking details field now is True.

Note that now that you have confirmed the banking details, you don't have the option to upload proof of account anymore. Once everything is confirmed you can click on Sign off Section.

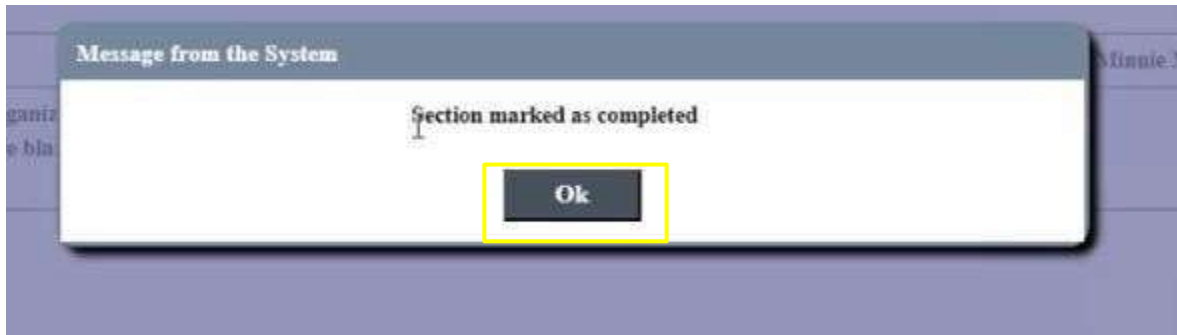
Workplace Skills Plan and Annual Training Report Template

Section:	Administrative Details	Form	AI	
Form Title	Organization Details			
Section Signed Off	No	SDE Signed Off	-	Date Signed Off
Note:	Please note that your organization's banking details appear below, are the current Teta records for the organization. If these are blank or different, please update, upload, and submit Proof of Banking Details on this page.			

- Close Form
- Edit Organization Details
- Edit Bank Details
- Sign Off Section

Organisation	Bank info
Bank Name	Capitol Bank
Branch Name	Lynwood
Branch Code	47009
Account Name	Loise Test
Account Number	27804932
Account Type	Savings Account
Proof of Account	Click to view file
Confirm Banking Details	Yes

A pop-up message from the system come up and click on Ok.



Now that you have signed off the form, the SDF who signed their name and the dates will appear on the field. The sign off field is now Yes.

Once you have signed off, you can still click on re-open this section and update the forms if there are some changes that you need to do.

Click on close once everything is done.

Workplace Skills Plan and Annual Training Report Template

Section	Administrative Details	Form	AI	
Form Title	Organisation Details			
Section Signed Off	Yes	SDF Signed Off	Lorna Kubayt	Date Signed Off
				31 January 2024 08:40
Note:	Please note that your organization's banking details appear below, are the current Teta records for the organization. If these are blank or different, please update, upload, and submit Proof of Banking Details on this page.			

Organisation	Bank Info
Bank Name	Capital Bank
Branch Name	Lymington
Branch Code	4700
Account Name	Lorna Tait
Account Number	27854532
Account Type	Savings Account
Proof of Account	Click to view file
Current Banking Details	Yes



Now that you have signed off, the Organisation field will be populated with the SDF name and the date it was signed.

Only the person SDF will be able to submit the WSP-ATR

- - Close
- - Download WSP-ATR Excel Template for Bulk Upload
- - Import WSP-ATR Excel Data
- - Print Download WSP-ATR
- - Request Extension
- - Generate Authentication Form
- - Upload Document
- - Edit Stakeholder Feedback
- - Submit Application

Application Status	New Application (Incomplete)	Application Status Reason	Application Start Date	11 January 2024 13:55
Application Submitted	No	Date Submitted	-	
Extension Granted	No	Extension Date		Extension Reason
General Comments				

Comments	Section Signed Off	SDF Signed Off	Date Signed Off	
Administration Details				
A1: Organisation Details	Yes	Miriam Mouse	13 January 2024 20:50	Open
A2: Organisation Contact	No	-	-	Open
A3: Training Committee	No	-	-	Open
A4: Primary SDF Details	No	-	-	Open
A5: Research and Knowledge Questionnaire	No	-	-	Open

Form A2, Organization Contact

Click Open.

Only the person SDF will be able to submit the WSP-ATR

- - Close
- - Download WSP-ATR Excel Template for Bulk Upload
- - Import WSP-ATR Excel Data
- - Print Download WSP-ATR
- - Request Extension
- - Generate Authentication Form
- - Upload Document
- - Edit Stakeholder Feedback
- - Submit Application

Application Status	New Application (Incomplete)	Application Status Reason	Application Start Date	11 January 2024 13:55
Application Submitted	No	Date Submitted	-	
Extension Granted	No	Extension Date		Extension Reason
General Comments				

Comments	Section Signed Off	SDF Signed Off	Date Signed Off	
Administration Details				
A1: Organisation Details	Yes	Miriam Mouse	13 January 2024 20:50	Open
A2: Organisation Contact	No	-	-	Open
A3: Training Committee	No	-	-	Open
A4: Primary SDF Details	No	-	-	Open
A5: Research and Knowledge Questionnaire	No	-	-	Open

The following screen will open and click on Add a New Stakeholder.

Note that you can add a minimum of three stakeholders, it will also allow you to have only one signatory captured.



Workplace Skills Plan and Annual Training Report Template

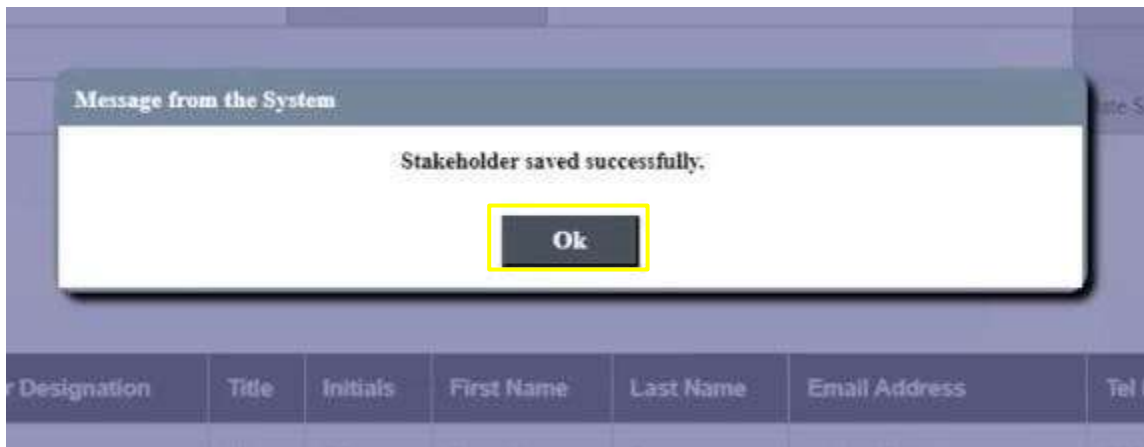
Section	Administrative Details	Form	A2	
Form Title	Organisation Contact			
Section Signed Off	No	SDP Signed Off	-	Date Signed Off

Organisation Contact

- Close Form
- Sign Off Section
- Add a New Stakeholder**

Company	Designation	Other Designation	Title	Initials	First Name	Last Name	Email Address	Tel Number	Cell Number	Signatory
---------	-------------	-------------------	-------	----------	------------	-----------	---------------	------------	-------------	-----------

A system message will appear, click OK



The following screen will open. Populate all the fields and click on Save.

Workplace Skills Plan and Annual Training Report Template

Section	Administrative Details	Form	A2
Form Title	Organisation Contact		
Section Signed Off	No	SDF Signed Off	-
		Date Signed Off	-

Stakeholder

Designation: HOD/CEO *

Title: Mr *

First Name: Donald *

E-Mail Address: donald@disney.co.za *

Cell Number: 0823333333 *

Representation – Employer and Employee: Independent *

Initials: DD *

Last Name: Duck *

Confirm E-Mail Address: donald@disney.co.za *

Telephone Number: 0823333333 *

Authorized Signatory to sign as an employer/management representative:

The SDF details will appear below and click on Add a new stakeholder to add the another stakeholder.

Workplace Skills Plan and Annual Training Report Template

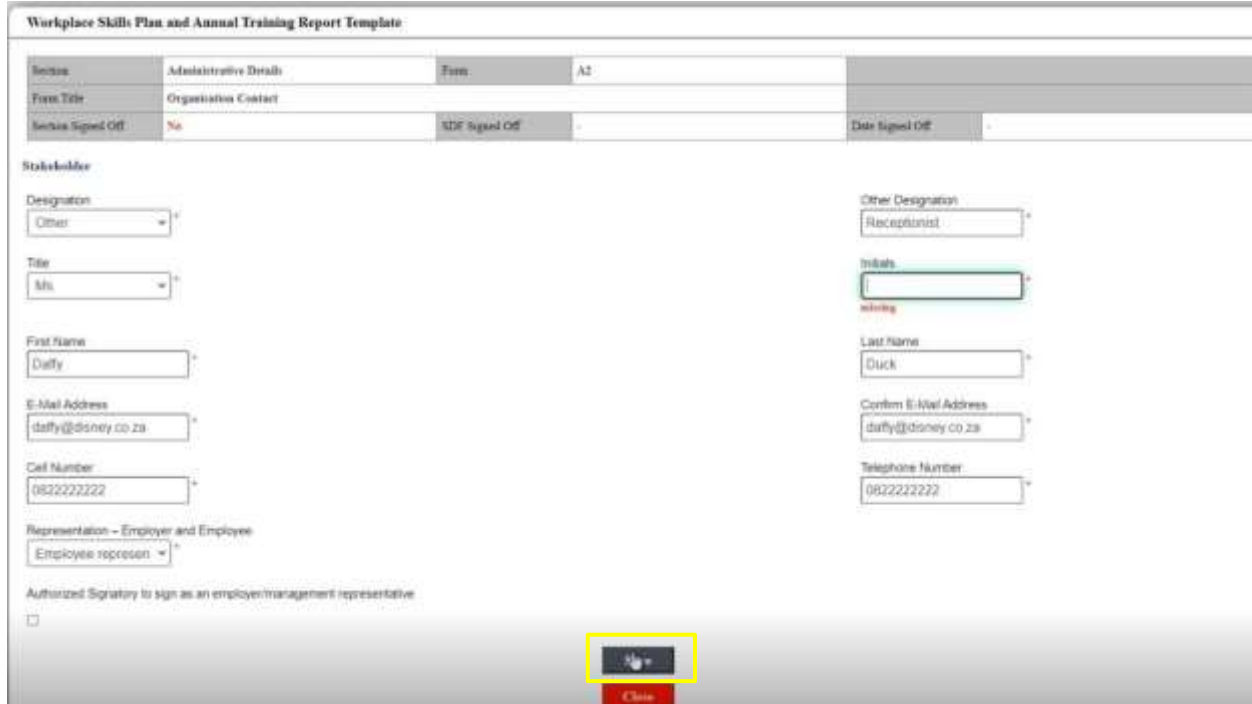
Section	Administrative Details	Form	A2
Form Title	Organisation Contact		
Section Signed Off	No	SDF Signed Off	-
		Date Signed Off	-

Organisation Contact

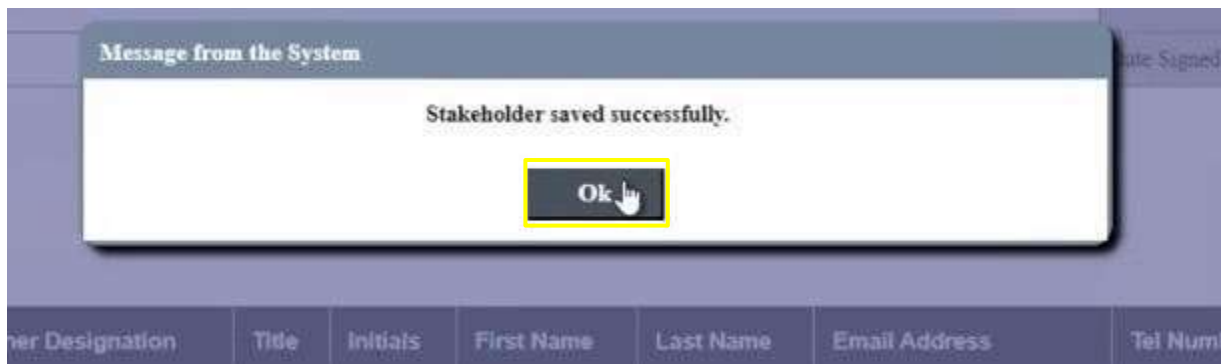
Company	Designation	Other Designation	Title	Initials	First Name	Last Name	Email Address	Tel Number	Cell Number	Signatory		
Demo Company	HOD/CEO		Mr	DD	Donald	Duck	donald@disney.co.za	0823333335	0823333333	Yes	SA	SAURS

Populate the fields below, and click on Save once complete.

Note that when you select Other under designation, a field for other designation will appear you will type in the designation type.



A pop-up message from the system will appear and click on Ok.



The stakeholder will appear on this screen and click on Add a New stakeholder to add the last stakeholder.

Please follow the same procedure as when adding the other stakeholders.

Workplace Skills Plan and Annual Training Report Template

Section	Administrative Details	Form	A3
Form Title	Organisation Contact		
Section Signed Off	No	EDF Signed Off	-
		Date Signed Off	-

Close Form
Sign Off Section
Add a New Stakeholder

Company	Designation	Other Designation	Title	Initials	First Name	Last Name	Email Address	Tel Number	Cell Number	Signatory		
Demo Company	Other	Receptionist	Ms	DD	Duffy	Duck	duffy@demey.co.za	0822222222	0822222222	No	Yes	Sign
Demo Company	HOD/CEO		Mr	DD	Donald	Duck	donald@demey.co.za	0823333333	0823333333	Yes	Yes	Sign

Once done add all three stakeholder, they appear as below and click on sign off section .

Workplace Skills Plan and Annual Training Report Template

Section	Administrative Details	Form	A3
Form Title	Organisation Contact		
Section Signed Off	No	EDF Signed Off	-
		Date Signed Off	-

Close Form
Sign Off Section
Add a New Stakeholder

Company	Designation	Other Designation	Title	Initials	First Name	Last Name	Email Address	Tel Number	Cell Number	Signatory		
Demo Company	Other	Receptionist	Ms	DD	Duffy	Duck	duffy@demey.co.za	0822222222	0822222222	No	Yes	Sign
Demo Company	CFO		Mr	DD	Goofy	Goofy	goofy@demey.co.za	0711111111	0711111111	No	Yes	Sign
Demo Company	HOD/CEO		Mr	DD	Donald	Duck	donald@demey.co.za	0823333333	0823333333	Yes	Yes	Sign

A system message will appear and click on OK.

Message from the System

Section marked as completed.

Ok

Other Designation	Title	Initials	First Name	Last Name	Email Address
-------------------	-------	----------	------------	-----------	---------------

You have the option to re-open the section to edit or you can click on Close Form

Workplace Skills Plan and Annual Training Report Template

Section	Administrative Details	Form	A3	
Form Title	Organisation Contact			
Section Signed Off	Yes	ADF Signed Off	Sharon Moore	Date Signed Off 13 January 2024 11:08

Organisational Contact

Company	Designation	Other Designation	Title	Initials	First Name	Last Name	Email Address	Tel Number	Cell Number	Signatory
Demo Company	Other	Receptionist	Ms	DD	Duffy	Duck	duffy@demey.co.za	0822222222	0822222222	No
Demo Company	DFG		Mr	GG	Goofy	Goofy	goofy@demey.co.za	0711111111	0711111111	No
Demo Company	HOD/CEO		Mr	DD	Donald	Duck	donald@demey.co.za	0823333333	0823333333	Yes

[Close Form](#)
[Re-Open this Section](#)

The next form is A3, Training Committee.
Click on the Open button.

Application Status	New Application (Template)	Application Status Reason		Application Status Date	11 January 2024 11:09
Application Submitted	No	Date Submitted	-		
Interviews Granted	No	Interview Date		Interview Reason	
General Comments					

- Import WSP ATR Excel Data
- Print Download WSP ATR
- Baggage Extension
- Generate Authentication Form
- Upload Document
- Edit Stakeholder Feedback
- Submit Application

Contents	Section Signed Off	ADF Signed Off	Date Signed Off	
Administrative Details				
A1: Organisation Details	Yes	Sharon Moore	13 January 2024 20:50	Open
A2: Organisation Contact	Yes	Sharon Moore	13 January 2024 21:06	Open
A3: Training Committee	No	-	-	Open
A4: Primary SCF Details	No	-	-	Open
A5: Research and Knowledge Questionnaire	No	-	-	Open

WorkPlace Skills Plan Summary



The following screen will open,

Please follow the same procedure as form A2(Organisation Contact), once done with form A3 and you can click on the sign off button.

Please note that you will be allowed to capture a minimum of five stakeholders, the system will only allow one Employer Representative can have a Yes and only one person on the Employee representative can have a Yes.

Workplace Skills Plan and Annual Training Report Template

Section:	Administrative Details	Form:	A3
Form Title:	Training Committee		
Section Signed Off:	No	SDF Signed Off:	-
		Date Signed Off:	-

Training Committee

- Close Form
- Sign Off Section
- Add a New Stakeholder

Designation	Other Designation	Title	Initials	First Name	Last Name	Email Address	Tel Number	Cell Number	Representative	Signatory
-------------	-------------------	-------	----------	------------	-----------	---------------	------------	-------------	----------------	-----------

Form A4, Primary SDF details

Click on the Open button.

New Application

Application Status:	New Application (No request)	Application Status Reason:		Application Submitted Date:	11 January 2024 11:59
Application Submitted:	No	Date Submitted:	-		
Emphasis Granted:	No	Emphasis Date:		Emphasis Reason:	
General Comments:					

Contents	Section Signed Off	SDF Signed Off	Date Signed Off	
Administrative Details				
A1: Organisation Details	Yes	Mouse Mouse	13 January 2024 20:59	Open
A2: Organisation Contact	Yes	Mouse Mouse	13 January 2024 21:05	Open
A3: Training Committee	Yes	Mouse Mouse	13 January 2024 21:06	Open
A4: Primary SDF Details	No	-	-	Open
A5: Research and Knowledge Questionnaire	No	-	-	Open
Workplace Skills Plan Summary				
2.02: Employment Summary	No	-	-	Open
2.03: Employment Potential Profile	Yes	Mouse Mouse	13 January 2024 20:29	Open
2.07: Planned Beneficiaries of Training	No	-	-	Open
2.08: Planned Training Per Intervention	No	-	-	Open

The following screen will open, click on Edit Profile to update the Primary SDF details.

Section	Administrative Details	Form	A4		
Form Title	Primary SDF Details				
Section Signed Off	No	SDF Signed Off	-	Date Signed Off	-

Close Form
Sign Off Section
Edit Profile

Make Mine

Personal Details

Member Type	South African Identity	Member ID	000010020001	Title	Miss
Birth Date	18 August 1990	Age	34		
Population Group	African	Gender	Female	Home Language	isiTswana
Nationality	South Africa	Citizenship	South Africa	Immigrant Status	SA Citizen
Social Grantee	Employed	Disability	None	Disability Rating	
E-mail Address	cmama@demo.co.za	Cell Number	0831234567		
Phone Number	0133333333				
Physical Address	Line 1 Line 2 Line 3 1200	Postal Address	Line 1 Line 2 Line 3 1200		
Province	Mpumalanga	Municipality	Mbombela Local Municipality	Urban/Rural	Rural

SDF Profile

SCM Members Industrial Psychology	SDF Level	Level 08	Did you attend the TETA	Yes
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This screen will open, please populate all the fields and and click on Save.

Title Miss	Disability None	
First Name Minnie	Middle Name	Last Name Minnie
e-mail Address cmama@demo.co.za	Cell Number 0831234567	
Phone Number 0133333333		
Job Title Training Co-ordinator	SDF Type External SDF/ Core	
Title of the Highest Qualification Obtained SCM Members Industrial Psychology	NQF Level Level 08	
OO-ETDP Qualification NQF Level None	Did you attend the TETA SDF forum? Yes	Have you completed a SDF Skills Programme? Yes
Would you be interested in the SDF funded Programme? Yes		

Save
Close

A message from the system will pop-up and click on OK.



It will re-direct to this screen below, where you click on sign off.

Section:	Administrative Details	Form:	A4		
Form Title:	Primary SDF Details				
Section Signed Off:	No	SDF Signed Off:	-	Day Signed Off:	-

- Close Form
- Sign Off Section
- Edit Profile



Minnie Storm

Personal Details

Identity Type:	South African Identity	Identity ID:	#9918020281	Title:	Miss
Birth Date:	13 August 1998	Age:	34	Home Language:	isiTswana
Population Group:	African	Gender:	Female	Immigrant Status:	SA Citizen
Residency:	South Africa	Citizenship:	South Africa	Disability Rating:	
Employment:	Employed	Disability:	None		

A pop-up message from the system will come up and click on OK,





It will direct to this screen, you can re-open the form or close the form, click on Close form.

Workplace Skills Plan and Annual Training Report Template

Section	Administrative Details	Form	A4	
Form Title	Primary SDF Details			
Section Signed Off	Yes	SDF Signed Off	Minnie Mouse	Date Signed Off
				13 January 2024 21:47

[- Close Form](#)
[- Re-Open this Section](#)



Minnie Mouse

Personal Details

Identity Type	South African Identity	Identity ID	00010020001	Title	Miss
Birth Date	18 August 1999	Age	24		
Population Group	African	Gender	Female	Home Language	isiTswana
Nationality	South Africa	Country	South Africa	Residential Status	SA Citizen

Form A5, Research and Knowledge Questionnaire

Once done, the following screen will open, click on Open to complete form A5

[- Edit Stakeholder Feedback](#)
[- Submit Application](#)

Application Status	New Application (Incomplete)	Application Status Reason		Application Status Date	11 January 2024 13:51
Application Submitted	No	Date Submitted	-		
Extension Granted	No	Extension Date		Extension Reason	
Overall Comments					

Checkbox	Section Signed Off	SDF Signed Off	Date Signed Off	
Administrative Details				
A1: Organisation Details	Yes	Minnie Mouse	13 January 2024 20:58	Open
A2: Organisation Contact	Yes	Minnie Mouse	13 January 2024 21:05	Open
A3: Training Committee	Yes	Minnie Mouse	13 January 2024 21:06	Open
A4: Primary SDF Details	Yes	Minnie Mouse	13 January 2024 21:07	Open
A5: Research and Knowledge Questionnaire	No	-	-	Open

Workplace Skills Plan Summary

The following screen will open, if your organization doesn't have hard to fill vacancies, you can just edit the form and submit, but if the organization has hard to fill vacancies you can click on Add hard to fill Occupation.

Section	Administrative Details	Form	A5
Form Title	Research and Knowledge Questionnaire		
Section Signed Off	No	EDF Signed Off	Date Signed Off
Note	If you have no hard to fill vacancies to report please select the 'Edit form' option only. If you have hard to fill vacancies to report please select 'Add Hard to fill Occupation' to complete the details.		

- Close Form
- Sign Off Section
- Add Hard to fill Occupation
- Edit form

Questionnaire

1. HARD-TO-FILL VACANCIES(H-T-F-V)

1. What would you say are occupations that are Hard-To-Fill Vacancies in your industry(s)? (i.e., it takes longer than 12 months to fill the position?)

2. Why are these occupations hard-to-fill?

Question 1	Question 2	Specify Other	Actions	Actions
Change Drivers				
1.1. Identify 3 major change drivers in your company/organization				

You can select the Occupation Category, Occupation and why is this occupation hard to fill, if the option is not there, then select other and specify. After click on Save.

Driven by Vision

Hard-to-Fill Vacancies

Occupation Category
LEGISLATORS

Occupation
2021-111101-6 - Ward Committee Member

Why is this occupation hard-to-fill?
Other, specify

specify Other
Test

Save

Close

A message from the system will pop-up and click on Ok.



Once the form is populated the information will display below. Click on Edit Form to edit the research and knowledge questionnaire.

Workplace Skills Plan and Annual Training Report Template

Section	Administrative Details	Form	All
Form Title	Research and Knowledge Questionnaire		
Section Signed Off	No	SEP Signed Off	Date Signed Off
Note	If you have no hard to fill vacancies to report please select the 'Edit form' section only. If you have hard to fill vacancies to report please select 'Add Hard to fill Occupations' to complete the details.		

-  Close Form
-  Sign Off Section
-  Add Hard to fill Occupations
-  Edit form

Questionnaire

I. HARD-TO-FILL VACANCIES (T-F-V)

1. What would you say are occupations that are Hard-To-Fill Vacancies in your subsector(s)? (i.e., it takes longer than 12 months to fill the position?)

2. Why are these occupations hard-to-fill?

Question 1	Question 2	Specify Other	Actions	Actions
305: IT/IS/IT & Web Content Manager	2. Max, specify	test	REMOVE	Save

Change Drivers

3.1 Identify 3 major change drivers in your company/organization.



Populate the form and Click on Save

RESEARCH AND KNOWLEDGE QUESTIONNAIRE

3.1 Identify 3 major change drivers in your company/organization *

Drivers

3.2 What are the implications of the above change drivers for skills development in your company/organization?

3.2.1 Factor 1: Explain Implications

Implications

3.2.2 Factor 2: Explain Implications

Explain

3.2.3 Factor 3: Explain Implications

Factors

4A. As a result of the change drivers mentioned above, do you have any new and emerging occupations in your organization? *

- Yes
- No

4B. As a result of the change drivers mentioned above, do you have any new and emerging top-up skills needed in your organization? *

- Yes
- No

Save

Close

After populating the form, the information will appear below.
Click on Sign off Section once done editing the form.

Legend:

- Close Form
- Sign Off Section
- Add Hard to Fill Occupation
- Edit Form

Questionnaire

1. HARD TO-FILL VACANCIES(H-T-F-V)

1. What would you say are occupations that are Hard-To-Fill Vacancies in your subsector(s)? (i.e., it takes longer than 12 months to fill the position?)

2. Why are these occupations hard-to-fill?

Question 1	Question 2	Specify Other	Actions	Actions
Change Drivers				
3.1. Identify 2 major change drivers in your company/organisation:				
Drivers:				
3.2. What are the implications of the above change drivers for skills development in your company/organisation?				
3.2.1 Factor 1: Explain Implications:				
Implications:				
3.2.2 Factor 2: Explain Implications:				
Explain:				
3.2.3 Factor 3: Explain Implications:				
Factors:				
Future Skills				
34. As a result of the change drivers mentioned above, do you have any new and emerging occupations in your organisation?				
Not Applicable				
35. As a result of the change drivers mentioned above, do you have any new and emerging top-up skills needed in your organisation?				

A pop-up message from the system will appear and click on OK.



You have the option to re-open the section if you need to edit something on the form.

Click on Close form if you done with editing.

Section	Administrative Details	Form	AS	
Form Title	Research and Knowledge Questionnaire			
Section Signed Off	Yes	NDP Signed Off	Missing Values	Date Signed Off: 11 January 2024 21:19
Note	If you have no hard to fill vacancies to report please select the 'Edit Form' section only. If you have hard to fill vacancies to report please select 'Add Hard to Fill Occupation' to complete the details.			

[Close Form](#)
[Re-Open this Section](#)

Questionnaire

1. HARD TO-FILL VACANCIES(H-T-F-V)

1. What would you say are occupations that are Hard-To-Fill Vacancies in your subsector(s)? (i.e., it takes longer than 12 months to fill the position?)



WSP Form

Form 2.02 Employment Summary.

Click Open on form 2.02.

Application Status:	New Application (Incomplete)	Application Status Reason:		Application Status Date:	11 January 2024 13:55
Application Submitted:	No	Date Submitted:	-		
Extension Granted:	No	Extension Date:		Extension Reason:	
General Comments:					
Criteria		Section Signed Off	SDF Signed Off	Date Signed Off	
Administrative Details					
A1: Organisation Details	Yes	Minnie Mouse		13 January 2024 20:59	Open
A2: Organisation Contact	Yes	Minnie Mouse		13 January 2024 21:06	Open
A3: Training Committee	No	Minnie Mouse		13 January 2024 21:06	Open
A4: Primary SDF Details	Yes	Minnie Mouse		13 January 2024 21:07	Open
A5: Research and Knowledge Questionnaire	Yes	Minnie Mouse		13 January 2024 21:10	Open
WorkPlace Skills Plan Summary					
2.02: Employment Summary	No	-	-		Open
2.03: Employment Provincial Profile	Yes	Minnie Mouse		13 January 2024 20:29	Open
2.07: Planned Beneficiaries of Training	No	-	-		Open
2.08: Planned Training Per Intervention	No	-	-		Open
2.09: Planned Training Budget	No	-	-		Open
Annual Training Report					

The following screen will appear, the WSP form 2.02 has an **import data from the previous year** button that you will use to populate data from last year.

Workplace Skills Plan and Annual Training Report Template

Section	WorkPlace Skills Plan Summary	Form	2.02	
Form Title	Employment Summary			
Form Description	Total number of employees per employment profile per occupational category, by gender, population group, disability status and age group.			
Section Signed Off	No	SDF Signed Off	-	Date Signed Off

- Close Form
- Sign Off Section
- Add Occupation
- Import data from the previous year

Occupation				Female				Male				Persons with Disability(PWD)				Age Group				
Occupation Category	Ofo Title	Ofo Code	EmploymentStatus	Province	Municipality	A	C	I	W	Total	A	C	I	W	Total	< 35	36 - 55	> 55	Total	Non-SA

Once you have click on Import data from the previous year, the system will populate all the data that was populated the previous year. You will have an option to edit or remove some fields if need be.

Workplace Skills Plan and Annual Training Report Template

Section	WorkPlace Skills Plan Summary	Form	1.01	
Form Title	Employment Summary			
Form Description	Total number of employees per employment profile per occupational category, by gender, population group, disability status and age group.			
Section Signed Off	No	EDF Signed Off	-	Date Signed Off

- Close Form
- Sign Off Section
- Add Occupation

Occupation Category	Ofo Title	Ofo Code	EmploymentStatus	Province	Municipality	Female				Male				Persons with Disability(PWD)				Age Group			Total	Mon-SA			
						A	C	I	W	A	C	I	W	A	C	I	W	Total	< 35	35 - 55				> 55	
MANAGERS	Chief Executive Officer (CEO)	2021-112191-6	Employed	Western Cape	City of Cape Town Metropolitan Municipality	0	1	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	
MANAGERS	Client Services Manager / Representative	2021-122105-1	Employed	Gauteng	City of Johannesburg Metropolitan Municipality	0	1	1	0	0	0	0	0	0	0	0	0	0	1	1	0	2	0	0	0
MANAGERS	Client Services Manager / Representative	2021-122105-1	Employed	Western Cape	City of Cape Town Metropolitan Municipality	0	3	0	0	0	0	0	0	0	0	0	0	0	1	2	0	3	0	0	0

If you want to capture new data, you can click on Add Occupation to new occupations.

Workplace Skills Plan and Annual Training Report Template

Section	WorkPlace Skills Plan Summary	Form	1.01	
Form Title	Employment Summary			
Form Description	Total number of employees per employment profile per occupational category, by gender, population group, disability status and age group.			
Section Signed Off	No	EDF Signed Off	-	Date Signed Off

- Close Form
- Sign Off Section
- Add Occupation
- Import data from the previous year

Occupation Category	Ofo Title	Ofo Code	EmploymentStatus	Province	Municipality	Female				Male				Persons with Disability(PWD)				Age Group			Total	Mon-SA	
						A	C	I	W	A	C	I	W	A	C	I	W	Total	< 35	35 - 55			



Populate the search occupation/specialization, which will populate the occupation/specialization, populate all the field on the and click on Save once done.

Note on the population group for female or male you need to populate the fields and the total needs to add up and be the same, if not you will receive an error message about the number of the population ground and the age group not being equal.

Search Occupation/Specialisation

Occupation/Specialisation
2021.732202 - Taxi Driver

Employment Status
Employed

Province
Free State

Municipality
Mokhotlong Local Municipality

Female

Population Group

African	Coloured	Indian/Asian	White	Total
1	2	1		4

Person with disability

African	Coloured	Indian/Asian	White
0			

Age Group

Less than or equal 25	26 - 55	Greater than 55	Total
1			1

Non-SA

Male

Population Group

African	Coloured	Indian/Asian	White	Total

Person with disability

African	Coloured	Indian/Asian	White

Age Group

Less than or equal 25	26 - 55	Greater than 55	Total

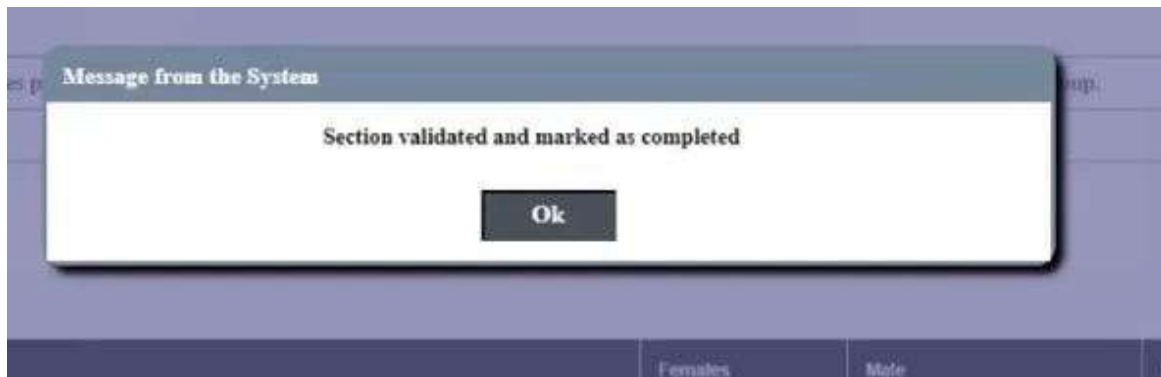
Non-SA

The Occupation will appear below, and you can sign off the section.

Series Signed Off: NDF Signed Off: Data Signed Off:

Occupation						Females				Male				Persons with Disability(PWD)					Age Group								
Occupation Category	Ofs Title	Ofs Code	Employment Status	Province	Municipality	A	C	I	W	A	C	I	W	Total	A	C	I	W	Total	< 30	30 - 55	> 55	Total	Non-SA			
SERVICE AND SALES WORKERS	Fight Punter	2021-511101-5	Employed	Gauteng	Merafong City Local Municipality	1	0	0	0	0	1	0	0	0	2	0	0	0	0	0	1	1	0	2	0	SA	Form
SKILLED AGRICULTURAL, FORESTRY, FISHERY, CRAFT AND RELATED TRADES WORKERS	Horticultural Farm Foreman	2021-871202-2	Unemployed	Gauteng	City of Tloane Metropolitan Municipality	2	1	2	0	0	0	1	0	6	1	0	0	0	1	4	2	0	6	0	SA	Form	
PLANT AND MACHINE OPERATORS AND ASSEMBLERS	Taxi Driver	2021-722207	Employed	Free State	Matieland Local Municipality	1	0	1	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	SA	Form
ELEMENTARY OCCUPATIONS	Bar Back	2021-962101-1	Employed	Mpumalanga	Gravel Mbeki Local Municipality	1	0	0	0	0	0	1	0	2	0	0	0	0	0	1	1	0	2	0	SA	Form	

A message from the system will pop-up and click on Ok.





Form 2.03 Employment provincial profile.
Click on the Open button.

- Selected Application

Application Status	New Application (Incomplete)	Application Status Reason		Application Status Date	11 January 2024 11:44
Application Submitted	No	Date Submitted	-		
Extension Granted	No	Extension Date		Extension Reason	
General Comments					
Comments	Section Signed Off	SDF Signed Off	Date Signed Off		
Administrative Details					
A1: Organisation Details	Yes	Minnie Mouse	13 January 2024 20:59		Open
A2: Organisation Contact	Yes	Minnie Mouse	13 January 2024 21:05		Open
A3: Training Committee	Yes	Minnie Mouse	13 January 2024 21:06		Open
A4: Primary SDF Details	Yes	Minnie Mouse	13 January 2024 21:07		Open
A5: Research and Knowledge Questionnaire	Yes	Minnie Mouse	13 January 2024 21:10		Open
Workplace Skills Plan Summary					
2.02: Employment Summary	Yes	Minnie Mouse	13 January 2024 21:16		Open
2.03: Employment Provincial Profile	Yes	Minnie Mouse	13 January 2024 20:26		Open
2.07: Planned Beneficiaries of Training	No	-	-		Open
2.08: Planned Training Per Intervention	No	-	-		Open
2.09: Planned Training Budget	No	-	-		Open
Annual Training Report					

The following screen will appear. You will have the option to sign off the form and close once done, you will not be able to edit this form.

Note: form 2.03 reads directly from form 2.02, this form gets auto populates with the data that you populate on form 2.02. So, the number of people which are in a specific province will appear on the form below.

Workplace Skills Plan and Annual Training Report Template								
Section	WorkPlace Skills Plan Summary		Form	2.03				
Form Title	Employment Provincial Profile							
Form Description								
Form Notes								
Section Signed Off	Yes	SDF Signed Off	Minnie Mouse	Date Signed Off	13 January 2024 20:26			
<input type="button" value="- Close Form"/> <input type="button" value="- Re-Open this Section"/>								
Western Cape	Northern Cape	Eastern Cape	Free State	Gauteng	Mpumalanga	Limpopo	North West	KwaZulu-Natal
0	0	0	0	0	2	0	0	0



- Submit Application

Application Status	New Application (Incomplete)	Application Status Reason		Application Status Date	11 January 2024 11:54
Application Submitted	No	Date Submitted	-		
Extension Granted	No	Extension Date		Extension Reason	
General Crosscut					
Criteria					
		Section Signed Off	SDF Signed Off	Date Signed Off	
Administrative Details					
A1: Organisation Details	Yes	Missie Mouse	Missie Mouse	13 January 2024 20:59	Open
A2: Organisation Contact	Yes	Missie Mouse	Missie Mouse	13 January 2024 21:05	Open
A3: Training Committee	Yes	Missie Mouse	Missie Mouse	13 January 2024 21:06	Open
A4: Priority SDF Details	Yes	Missie Mouse	Missie Mouse	13 January 2024 21:07	Open
A5: Research and Knowledge Questionnaire	Yes	Missie Mouse	Missie Mouse	13 January 2024 21:10	Open
Workplace Skills Plan Summary					
2.02: Employment Summary	Yes	Missie Mouse	Missie Mouse	13 January 2024 21:16	Open
2.03: Employment Provincial Profile	Yes	Missie Mouse	Missie Mouse	13 January 2024 20:29	Open
2.07: Planned Beneficiaries of Training	No	-	-	-	Open
2.08: Planned Training Per Intervention	No	-	-	-	Open
2.09: Planned Training Budget	No	-	-	-	Open
Annual Training Report					

2.07 Planned Beneficiaries of Training
Click on the Open button.

- Submit Application

Application Status	New Application (Incomplete)	Application Status Reason		Application Status Date	11 January 2024 11:54
Application Submitted	No	Date Submitted	-		
Extension Granted	No	Extension Date		Extension Reason	
General Crosscut					
Criteria					
		Section Signed Off	SDF Signed Off	Date Signed Off	
Administrative Details					
A1: Organisation Details	Yes	Missie Mouse	Missie Mouse	13 January 2024 20:59	Open
A2: Organisation Contact	Yes	Missie Mouse	Missie Mouse	13 January 2024 21:05	Open
A3: Training Committee	Yes	Missie Mouse	Missie Mouse	13 January 2024 21:06	Open
A4: Priority SDF Details	Yes	Missie Mouse	Missie Mouse	13 January 2024 21:07	Open
A5: Research and Knowledge Questionnaire	Yes	Missie Mouse	Missie Mouse	13 January 2024 21:10	Open
Workplace Skills Plan Summary					
2.02: Employment Summary	Yes	Missie Mouse	Missie Mouse	13 January 2024 21:16	Open
2.03: Employment Provincial Profile	Yes	Missie Mouse	Missie Mouse	13 January 2024 20:29	Open
2.07: Planned Beneficiaries of Training	No	-	-	-	Open
2.08: Planned Training Per Intervention	No	-	-	-	Open
2.09: Planned Training Budget	No	-	-	-	Open
Annual Training Report					

The following screen will appear, you have an option to download Excel sheet for upload once done completing the sheet, you have an option to import the sheet.



You also have an option to click on Add Occupation.

Workplace Skills Plan and Annual Training Report Template

Section	Workplace Skills Plan Summary	Time	2.87
Form Title	Planned Beneficiaries of Training		
Form Description	Planned beneficiaries of training per occupational category by gender, population group, disability status		
Section Signed Off	Yes	NDP Signed Off	Date Signed Off

- Close Form
- Sign Off Switch
- Download Excel Sheet for upload
- Import Data from an Excel Sheet
- Add Occupation

Occupation						Female				Male				Persons with Disability (PWD)					Age Group						
Occupation Category	Offs Title	Offs Code	Employment Status	Province	Municipality	A	C	I	W	A	C	I	W	Total	A	C	I	W	Total	< 20	20 - 35	35 - 50	50 - 65	Total	Non-SA

Populate the search occupation/specialization, which will populate the occupation/specialization, populate all the field on the and click on Save once done.

Note on the population group for female or male you need to populate the fields and the total needs to add up and be the same with the Age group, if not you will receive an error message about the number of the population ground and the age group not being equal.

Search Occupation/Specialisation

Occupation/Specialisation
2021-733252 - Taxi Driver

Employment Status
Employed

Province
Free State

Municipality
Mamotsho Local Municipality

Female
Population Group



African	Coloured	Indian/Asian	White	Total
1	2	1		4
Persons with disability				
African	Coloured	Indian/Asian	White	
0				
Age Group				
Less than or equal 35	36 - 55	Greater than 55	Total	
3			3	
Non-SA				
Male				
Population Group				
African	Coloured	Indian/Asian	White	Total
Persons with disability				
African	Coloured	Indian/Asian	White	
Age Group				
Less than or equal 35	36 - 55	Greater than 55	Total	
Non-SA				

The Occupation will appear below, and you can sign off the section.

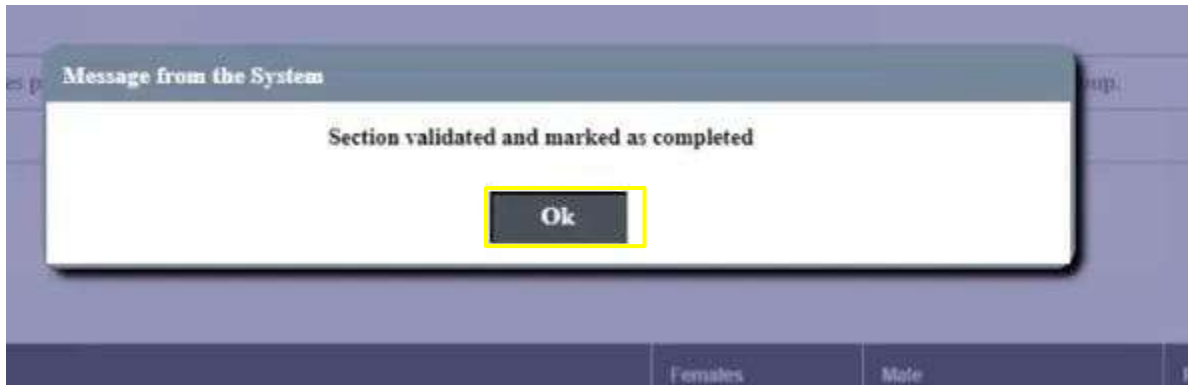
Workplace Skills Plan and Annual Training Report Template

Service	Workplace Skills Plan Necessary	From	1.01
From Date	Planned Beneficiaries of Training		
From Description	Planned beneficiaries of training per occupational category by gender, population group, disability status		
Service Signed Off	No	SCF Signed Off	Date Signed Off

- Close Fields
- Sign Off Section
- Download Excel Sheet for upload
- Report Date Box as Excel Sheet
- Add Occupations

Occupation						Female					Male					Persons with Disability (PWS)					Age Group				
Occupation Category	Old Title	Old Code	Employment Status	Province	Municipality	A	C	I	W	A	C	I	W	Total	A	C	I	W	Total	< 35	36 - 55	> 55	Total	Non-SA	
PLANT AND MACHINE OPERATORS AND ASSEMBLERS	School Bus Driver	2021-733101-2	Employed	KwaZulu-Natal	Ingeni Local Municipality	1	0	0	0	0	2	0	0	3	0	0	0	0	0	1	2	0	3	0	SA

A message from the system will pop-up and click on Ok.



2.08 Planned Training Per Intervention

Note that what you did on WSP 2.07 will be done on this same form, you will follow the same procedure.

Application Status	New Application (Incomplete)	Application Form Branch		Application Status Date	11 January 2024 11:59
Application Submitted	No	Date Submitted		Extension Reason	
Extension Granted	No	Extension Date		Extension Reason	
General Comments					
Comments	Section Signed Off	SDF Signed Off	Date Signed Off		
Administrative Details					
A1: Organisation Details	Yes	Minnie Mouse	13 January 2024 20:59		Open
A2: Organisation Contact	Yes	Minnie Mouse	13 January 2024 21:05		Open
A3: Training Committee	Yes	Minnie Mouse	13 January 2024 21:06		Open
A4: Primary SDF Details	Yes	Minnie Mouse	13 January 2024 21:07		Open
A5: Research and Knowledge Questionnaire	Yes	Minnie Mouse	13 January 2024 21:10		Open
Workplace Skills Plan Summary					
2.02: Employment Summary	Yes	Minnie Mouse	13 January 2024 21:16		Open
2.03: Employment Provincial Profile	Yes	Minnie Mouse	13 January 2024 20:29		Open
2.07: Planned Beneficiaries of Training	Yes	Minnie Mouse	13 January 2024 21:31		Open
2.08: Planned Training Per Intervention	No	-	-		Open
2.09: Planned Training Budget	No	-	-		Open



2.09 Planned Training Budget.
Click open on Form 2.09

Controls	Review Signed Off	SDF Signed Off	Date Signed Off	
Administrative Details				
A1: Organisation Details	Yes	Minnie Mouse	13 January 2024 20:59	Open
A2: Organisation Contact	Yes	Minnie Mouse	13 January 2024 21:05	Open
A3: Training Committee	Yes	Minnie Mouse	13 January 2024 21:06	Open
A4: Primary SDF Details	Yes	Minnie Mouse	13 January 2024 21:07	Open
A5: Research and Knowledge Questionnaire	Yes	Minnie Mouse	13 January 2024 21:10	Open
Workplace Skills Plan Summary				
2.02: Employment Summary	Yes	Minnie Mouse	13 January 2024 21:16	Open
2.03: Employment Provincial Profile	Yes	Minnie Mouse	13 January 2024 20:29	Open
2.07: Planned Beneficiaries of Training	Yes	Minnie Mouse	13 January 2024 21:21	Open
2.08: Planned Training Per Intervention	Yes	Minnie Mouse	13 January 2024 21:23	Open
2.09: Planned Training Budget	No	-	-	Open
Annual Training Report				
1.1: Number of Actual Beneficiaries	No	-	-	Open

This screen will open, you can click on add data.

Workplace Skills Plan and Annual Training Report Template

Series	WorkPlace Skills Plan Summary	Form	2.09	
Form Title	Planned Training Budget			
Form Description				
Form Notes				
Review Signed Off	No	SDF Signed Off	-	Date Signed Off

Close Form
Sign Off Section
Add Data

Budget Type	Amount	Est	Date
TETA - Discretionary Grant Funds	4000		

The pop-up screen will open with a form that needs to be filled, select the fund type.

Workplace Skills Plan and Annual Training Report Template

Form

Fund Type

- Industry Funded (Company Funded)
- Mandatory Grant Funds
- Other Funding - Government, Donors, Other SETAs
- TETA - Discretionary Grant Funds

Save

Close

Once selected you will type in the amount and click on Save.



The budget will appear below, you can now sign off the section.

Workplace Skills Plan and Annual Training Report Template

Section	WorkPlace Skills Plan Summary	Form	2.10
Form Title	Planned Training Budget		
Form Description			
Form Name			
Section Signed Off	No	NDP Signed Off	-
Date Signed Off			

- Close Form
- Sign Off Section
- Add Data

Budget Type	Amount		
TETA - Discretionary Grant Funds	4000		Delete
TETA - Discretionary Grant Funds	2000		Delete

A pop-up message from the system will appear and click on OK.





Click Close form to close your form.

Workplace Skills Plan and Annual Training Report Template

Section	Workplace Skills Plan Summary	Form	2.08	
Form Title	Planned Training Budget			
Form Description				
Form Name				
Section Signed Off	Yes	SOP Signed Off	Missed Minutes	Date Signed Off 13 January 2024 21:34

Close Form

Re-Open this Section

Budget Type	Amount
TETA - Discretionary Grant Funds	400
TETA - Discretionary Grant Funds	2000

ATR forms

Form ATR 1.1

Click on the Open button.

Annual Training Report			
1.1: Number of Actual Beneficiaries	No		Open
1.2: Beneficiaries Completed Training Per Intervention	No		Open
1.3: Impact Assessment	No		Open

Application Requirements			
Document Title	Document Description	Document Compulsory	
Signed Authorisation Form for small, medium and large - compulsory	Signed Authorisation Form for small, medium and large - compulsory	Compulsory	File Not uploaded
Training Committee minutes (Not required for small companies) Compulsory form medium and large	Training Committee minutes (Not required for small companies) Compulsory form medium and large	Compulsory for medium and large	File Not uploaded

The following screen will appear. You will have to option to *Import data from the previous year WSP*.

When you click on *Import data from the previous WSP*

Once you have clicked on import data from the previous year WSP it will populate all the data the was populated on WSP 2.7 Planned Beneficiaries of Training previous year.

Workplace Skills Plan and Annual Training Report Template

Section	Annual Training Report	Form	1.1	
Form Title	Number of Actual Beneficiaries			
Form Description	Number of actual beneficiaries of training per occupational category, by gender, population group and disability status.			
Section Signed Off	No	SOP Signed Off	-	Date Signed Off -

- Close Form
- Sign Off Section
- Download Excel Sheet for upload
- Import Data from an Excel Sheet
- Add Occupation
- Import data from the previous WSP

Occupation					Females				Male				Persons with Disability(PWD)					Age Group			Total	Non-SA		
Occupation Category	Ofo Title	Ofo Code	EmploymentStatus	Province	Municipality	A	C	I	W	A	C	I	W	Total	A	C	I	W	Total	< 35			36 - 55	> 56

The data from the previous year WSP will populate. You have the option to edit and remove some of the fields if necessary. Once done you can sign off the section.

Should you wish to add new Occupation manually or importing an excel sheet, please follow the same method as form WSP 2.7

Section:	Annual Training Report	Form:	1.1
Form Title:	Number of Actual Beneficiaries		
Form Description:	Number of actual beneficiaries of training per occupational category, by gender, population group and disability status.		
Section Signed Off:	No	SDF Signed Off:	-
		Date Signed Off:	-

- Close Form
- Sign Off Section
- Download Excel Sheet for upload
- Import Data from an Excel Sheet
- Add Occupations

Occupation						Female				Male				Persons with Disability(PWD)					Age Group								
Occupation Category	Ofo Title	Ofo Code	Employment Status	Province	Municipality	A	C	I	W	A	C	I	W	Total	A	C	I	W	Total	< 35	36 - 55	> 55	Total	Non-SA			
MANAGERS	Client Services Manager / Representative	2021-122185-1	Unemployed			0	0	1	0	0	1	0	0	2	0	0	0	0	0	1	1	0	2	0	0	0	0
MANAGERS	Client Services Manager / Representative	2021-122185-1	Employed	Western Cape	City of Cape Town Metropolitan Municipality	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	7	0	9	0	0	0	0
MANAGERS	Client Services Manager / Representative	2021-122185-1	Employed	Gauteng	City of Johannesburg Metropolitan Municipality	0	1	1	0	0	0	0	0	2	0	0	0	0	0	1	1	0	2	0	0	0	0
MANAGERS	Customer Service Manager	2021-122185	Employed	KwaZulu-Natal	KwaZulu Local Municipality	0	0	1	0	0	0	0	0	1	0	0	0	0	0	0	1	0	1	0	0	0	0

Form ATR 1.2

Click on the Open button.

Annual Training Report				
1.1: Number of Actual Beneficiaries	Yes	Lobke Kullayl	31 January 2024 11:29	Open
1.2: Beneficiaries Completed Training Per Intervention	No	-	-	Open
1.3: Impact Assessment	No	-	-	Open
Applicable Documents				
Document Title	Document Description		Document Compulsory	
Signed Authorization Form for small, medium and large - compulsory	Signed Authorization Form for small, medium and large - compulsory		Compulsory	File Not uploaded
Training Committee minutes (Not required for small companies) Compulsory form medium and large	Training Committee minutes (Not required for small companies) Compulsory form medium and large		Compulsory for medium and large	File Not uploaded
BBBEE certificate or Exception certificate or Affidavit	BBBEE certificate or Exception certificate or Affidavit		Compulsory	File Not uploaded
Inter-SETA transfer form (IST01)	Inter-SETA transfer form (IST01)		Compulsory (Only if transferred from another SETA)	File Not uploaded

The following screen will appear. You will have to option to *Import data from the previous year WSP.*

When you click on *Import data from the previous WSP.*

Once you have clicked on import data from the previous year WSP it will populate all the data the was populated on WSP 2.08: Planned Training Per Intervention the previous year.

Workplace Skills Plan and Annual Training Report Template

Name	Annual Training Report	Form	11
Form Title	Benefits/Activities Completed Training Per Intervention		
Form Description	Number of trained beneficiaries per occupational category, by gender, population group and disability status.		
Status Signed Off	No	SDF Signed Off	Date Signed Off

- Close Form
- Sign Off Section
- Download Excel Sheet for upload
- Import Data from an Excel Sheet
- Add Occupations
- Import data from previous WSP

Occupation													Gender					Race					Persons with Disability (PWD)					Age Group		
Occ. Title	Occ. Code	Employment Status	Municipality	Name of Learning Programme	Learning Programme Type	Is this WSP aligned Training	Training Linked To	Start Date	End Date	Training Regulatory	Type Of Educational Institution	Training Level	A	C	I	W	A	C	I	W	Total	A	C	I	W	Total	> 35	> 55	Total	Non SA

The data from the previous year WSP will populate. You have the option to edit and remove some of the fields if necessary. Once done you can sign off the section.

Should you wish to add new Occupation manually or importing an excel sheet, please follow the same method as form WSP 2.8

Workplace Skills Plan and Annual Training Report Template

Name	Annual Training Report	Form	11
Form Title	Benefits/Activities Completed Training Per Intervention		
Form Description	Number of trained beneficiaries per occupational category, by gender, population group and disability status.		
Status Signed Off	No	SDF Signed Off	Date Signed Off

- Close Form
- Sign Off Section
- Download Excel Sheet for upload
- Import Data from an Excel Sheet
- Add Occupations

Occupation													Gender					Race					Persons with Disability (PWD)					Age Group				
Occ. Title	Occ. Code	Employment Status	Municipality	Name of Learning Programme	Learning Programme Type	Is this WSP aligned Training	Training Linked To	Start Date	End Date	Training Regulatory	Type Of Educational Institution	Training Level	A	C	I	W	A	C	I	W	Total	A	C	I	W	Total	> 35	> 55	Total	Non SA		
Client Services Manager / Representative	2021-122105-1	Employed	City of Cape Town Metropolitan Municipality	Subsidiary skills for home care	Short Courses	No	Apprenticeship	2025-07-01	2025-07-01	No	Private Provider	Intermediate level	0	1	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0
Client Services Manager / Representative	2021-122106-1	Employed	City of Cape Town Metropolitan Municipality	Apprenticeship skills for home care	Short Courses	No	Apprenticeship	2025-08-01	2025-08-01	No	Private Provider	Intermediate level	0	1	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0
Client Services Manager / Representative	2021-122108-1	Employed	City of Cape Town Metropolitan Municipality	Project management foundation	Short Courses	No	Apprenticeship	2025-06-25	2025-06-25	No	Private Provider	Advanced	0	1	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0



Form ATR 1.3

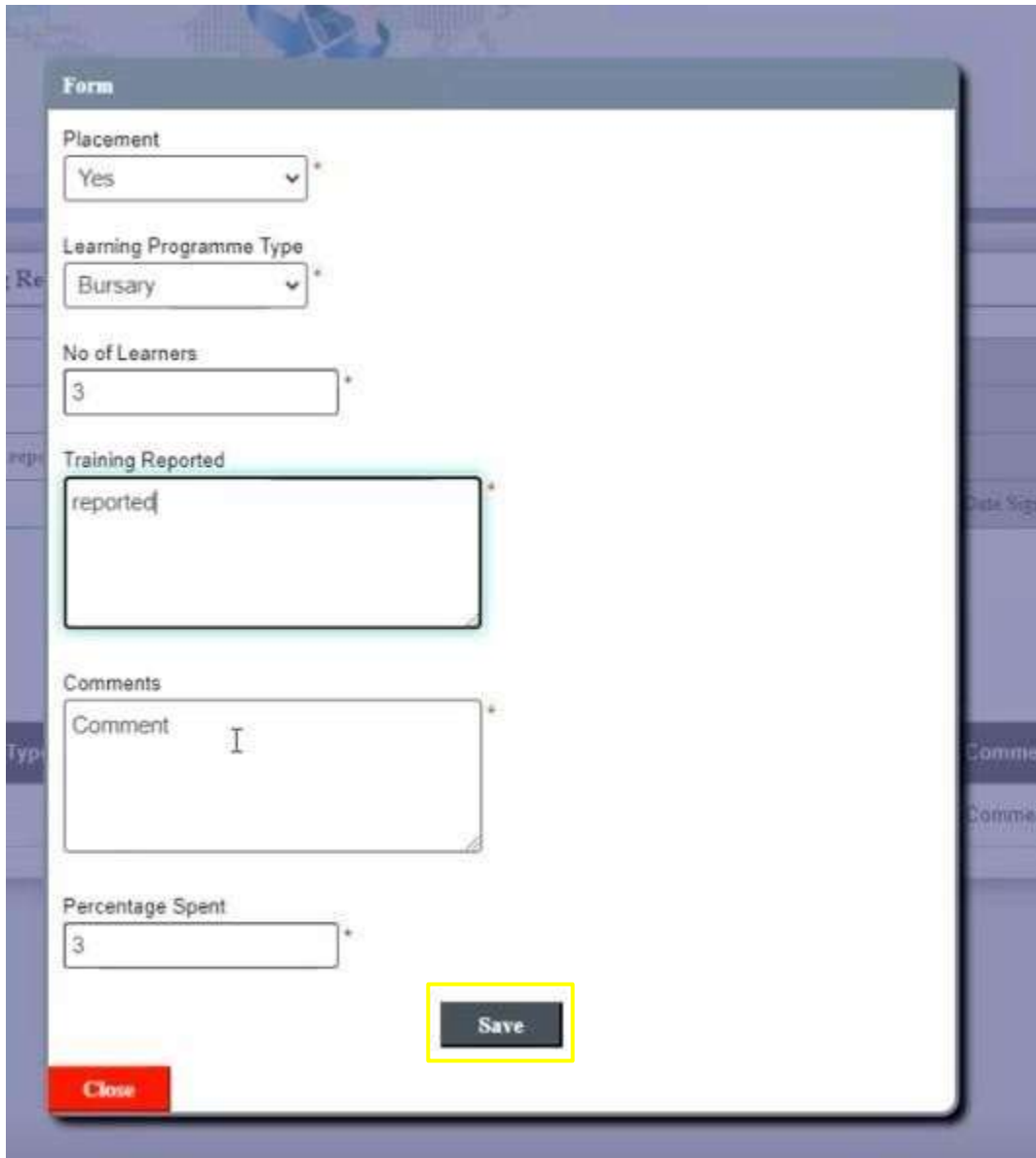
Click Open on Impact Assessment.

Annual Training Report				
1.1. Number of Actual Beneficiaries	Yes	Mouse Mouse	13 January 2024 21:27	Open
1.2. Beneficiaries Completed Training For Intervention	No	-	-	Open
1.3. Impact Assessment	No	-	-	Open
Application Documents				
Document File	Document Description	Document Compulsory		
Signed Authorisation Form for small, medium and large - compulsory	Signed Authorisation Form for small, medium and large - compulsory	Compulsory	File Not uploaded	
Training Committee minutes (Not required for small companies) Compulsory form: medium and large	Training Committee minutes (Not required for small companies) Compulsory form: medium and large	Compulsory for medium and large	File Not uploaded	
IBBEE certificate or Exception certificate or Affidavit	IBBEE certificate or Exception certificate or Affidavit	Compulsory	File Not uploaded	
Inter-SETA transfer form (ISTF1)	Inter-SETA transfer form (ISTF1)	Compulsory (Only if Transferred from another SETA)	File Not uploaded	
Approved WSP and ATR from another SETA	Approved WSP and ATR from another SETA	Compulsory (Only if Transferred from another SETA)	File Not uploaded	
WSP/ATR Approval letter	WSP/ATR Approval letter	Compulsory (Only if Transferred from another SETA)	File Not uploaded	
Proof of Training	Attendance Registers or Certificates or Statement of Results or Proof of Invoice and Proof of Payment	Compulsory	File Not uploaded	

Click on Add data to create a Assessment report.

Workplace Skills Plan and Annual Training Report Template						
Section	Annual Training Report	Form	1.3			
Form Title	Impact Assessment					
Form Description	Indicate how training as reported in the ATR and PTR has affected the company.					
Section Signed Off	No	SDF Signed Off	-	Date Signed Off	-	
Close Form Sign Off Section Add Data						
Placement	Learning Programme Type	No of Learners	Training Reported	Comments	Percentage Spent	
True	Bursary	1	reported	Comment	1	Yes

The form will open, please populate the form and click on Save.



Form

Placement
Yes *

Learning Programme Type
Bursary *

No of Learners
3 *

Training Reported
reported *

Comments
Comment I *

Percentage Spent
3 *

Save

Close

Once done click on Sign off section.

Workplace Skills Plan and Annual Training Report Template

Section	Annual Training Report	Form	LI	
Form Title	Support Assessment			
Form Description	Indicates how training as reported to the ATR and PTR has affected the company.			
Section Sign Off	%	SDF Sign Off	-	Date Sign Off

[Clear Form](#)
[Sign Off Section](#)
[Add Data](#)

Placement	Learning Programme Type	No of Learners	Training Reported	Comments	Percentage Spent	
True	Bursary	3	reported	Comment	3	Yes

After you can click on Close form, you also have the option to re-open the form.

Workplaces Skills Plan and Annual Training Report Template

Section	Annual Training Report	Form	L3	
Form Title	Impact Assessment			
Form Description	Indicate how training as reported in the ATR and FTR has affected the company.			
Section Signed Off	Yes	ATR Signed Off	Minnie Mouse	Date Signed Off
				13 January 2024 21:50

- Close Form
- Re-Open this Section

Placement	LearningProgrammeType	No of Learners	Training Reported	Comments	Percentage Spent
Tina	Bursary	3	reported	Comment	30

Once you have signed off the sign off field will be marked yes.

10. Research and Knowledge Questionnaire	Yes	Minnie Mouse	13 January 2024 21:10	Open
Workplace Skills Plan Summary				
2.02. Employment Summary	Yes	Minnie Mouse	13 January 2024 21:16	Open
2.03. Employment Potential Profile	Yes	Minnie Mouse	13 January 2024 20:29	Open
2.07. Planned Beneficiaries of Training	Yes	Minnie Mouse	15 January 2024 21:21	Open
2.08. Planned Training For Intervention	Yes	Minnie Mouse	13 January 2024 21:23	Open
2.09. Planned Training Budget	Yes	Minnie Mouse	13 January 2024 21:24	Open
Annual Training Report				
1.1. Number of Actual Beneficiaries	Yes	Minnie Mouse	13 January 2024 21:27	Open
1.2. Beneficiaries Completed Training Per Intervention	Yes	-	-	Open
1.3. Impact Assessment	Yes	Minnie Mouse	13 January 2024 21:30	Open
Application Documents				
Document Title	Document Description	Document Compulsory		
Signed Authorisation Form for small, medium and large - compulsory	Signed Authorisation Form for small, medium and large - compulsory	Compulsory		File Not uploaded

Click on Upload documents to be able to upload your document.

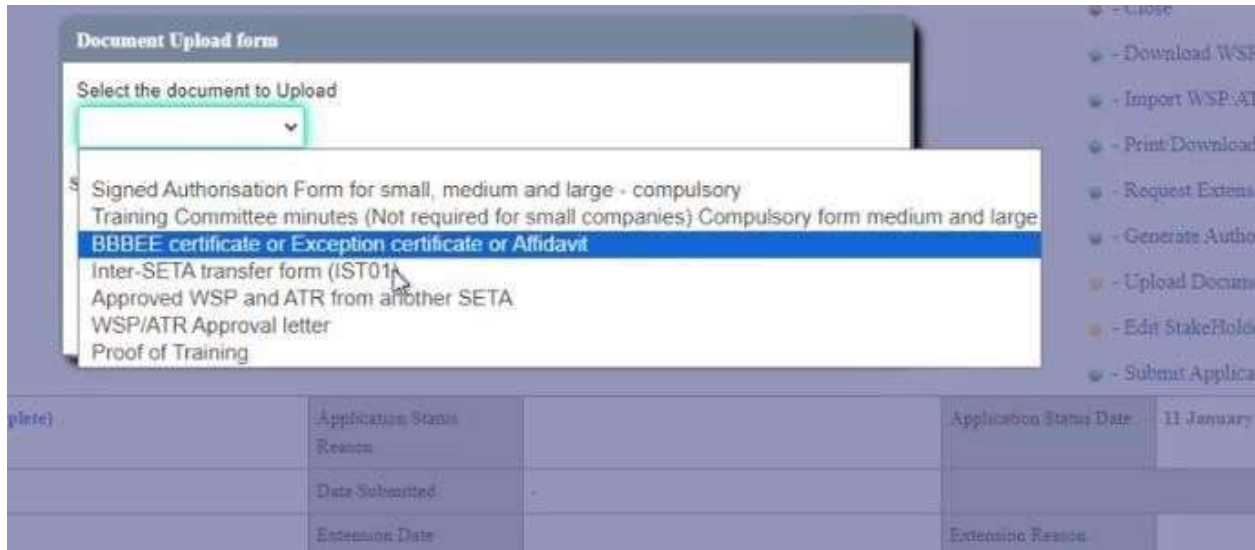
Workplace Skills Plan and Annual Training Report Template

Only the primary SDF will be able to submit the WSP-ATR

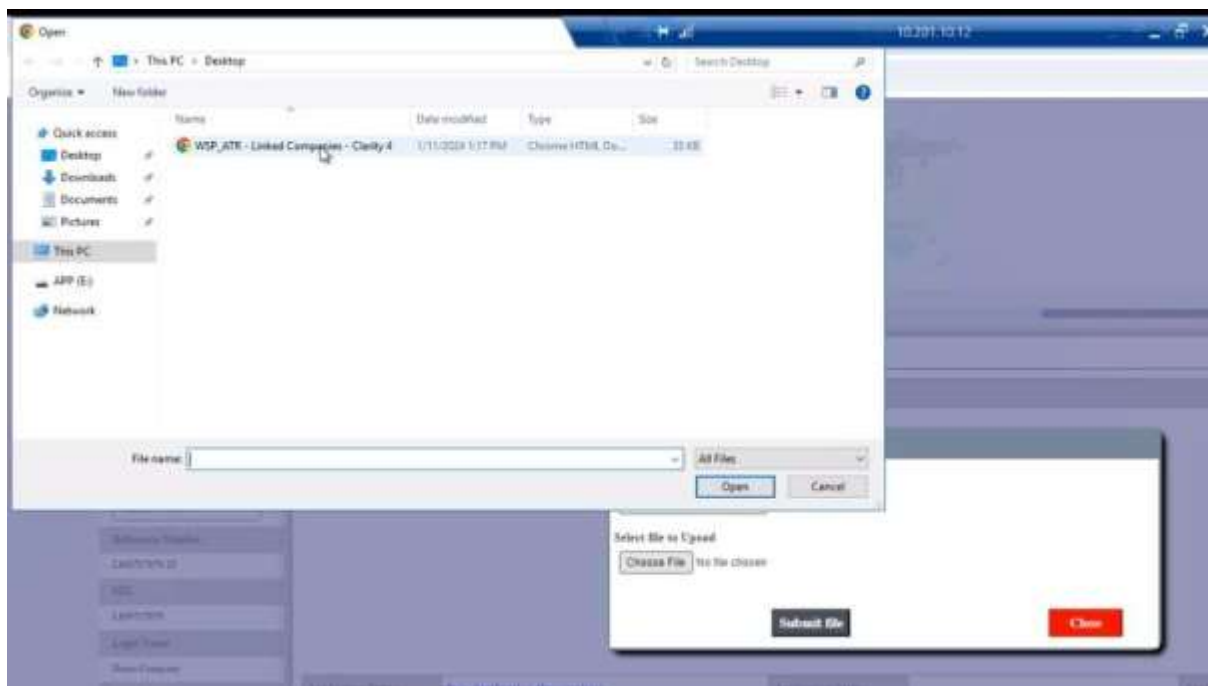
- Close
- Download WSP-ATR Excel Template for Bulk Upload
- Import WSP-ATR Excel Data
- Print Download WSP-ATR
- Request Extension
- Generate Authorisation Form
- Upload Document
- Edit Stakeholder Feedback
- Submit Application

Application Status	New Application (Incomplete)	Application Status Reason		Application Status Date	11 January 2024 13:55
Application Submitted	No	Date Submitted			
Extension Granted	No	Extension Date		Extension Reason	
General Comments					

These are the options of documents that need to be uploaded, select the a document.



Click on upload and choose the document you want and select the document and click on Open.



Click on Submit file once done uploading.



The documents that you have upload will display on this screen, you will have link and the option to view/download once loaded.

Document Title	Document Description	Document Compulsory	
Signed Authorisation Form for small, medium and large - compulsory	Signed Authorisation Form for small, medium and large - compulsory	Compulsory	Click to View/Download File
Training Committee minutes (Not required for small companies) Compulsory form medium and large	Training Committee minutes (Not required for small companies) Compulsory form medium and large	Compulsory for medium and large	Click to View/Download File
BBBEE certificate or Exception certificate or Affidavit	BBBEE certificate or Exception certificate or Affidavit	Compulsory	Click to View/Download File
Inter-SETA transfer form (IST01)	Inter-SETA transfer form (IST01)	Compulsory (Only if Transferred from another SETA)	Click to View/Download File
Proof of Training	Certificates or Statement of Results (alternatively Attendance Register/Invoice and Proof of Payment)	Compulsory	Click to View/Download File

Click on Edit stakeholder feedback, to give feedback about your experience with Clarity and SDF forums.

Workspace Home Page and Annual Training Report template

Only the primary SDF will be able to submit the WSP-ATR

- Close
- Download WSP-ATR Excel Template for Bulk Upload
- Import WSP-ATR Excel Data
- Print Download WSP-ATR
- Request Extension
- Generate Authorisation Forms
- Upload Documents
- Edit Stakeholder Feedback**
- Submit Application

Application Status	New Application (Incomplete)	Application Status Reason		Application Status Date	11 January 2024 13:55
Application Submitted	No	Date Submitted			
Extension Granted	No	Extension Date		Extension Reason	
General Comments					



Populate the feedback form and when done click on Save.

StakeHolder Feedback

Did you attend the SDF Forums?

Does your chamber offer support and guidance when needed?

Did they capacitate you to submit?

Is the online system user friendly?

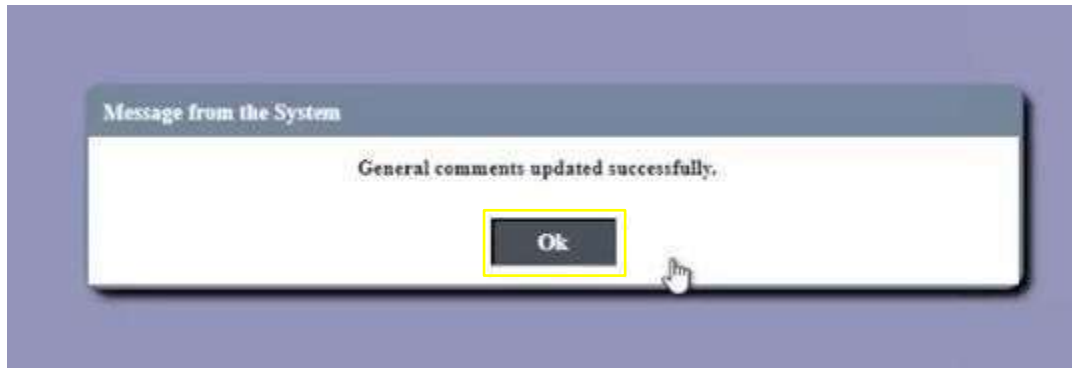
Would you suggest any system improvements?

Are you willing to take TETA previously funded learners for workplace experience and internship programmes?

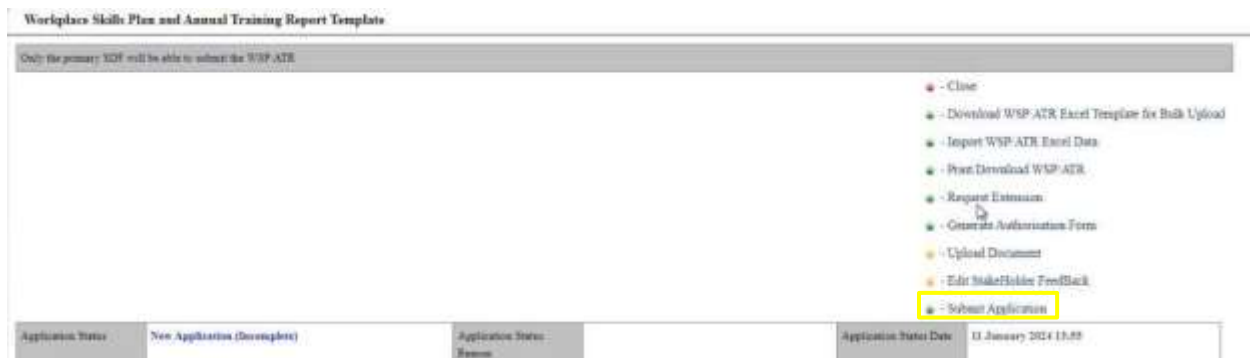
Can TETA engage your organization regarding placements?

General Comments

A pop-up message will appear and click on OK.

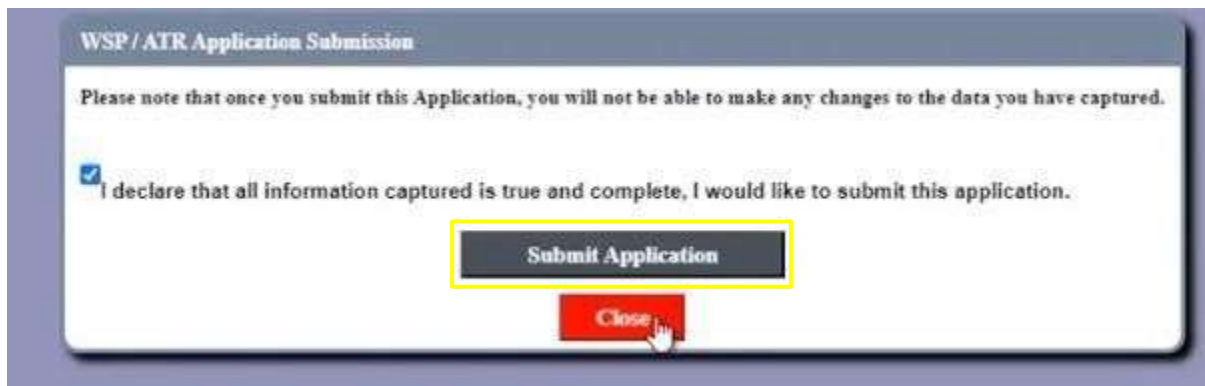


Click on the submit application button.



A pop-up screen will appear and click on the declaration check box, and click on submit application.

You application you will wait for feedback from TETA.





Transport Education Training Authority
Driven by Vision

