

# SERVICES SETA

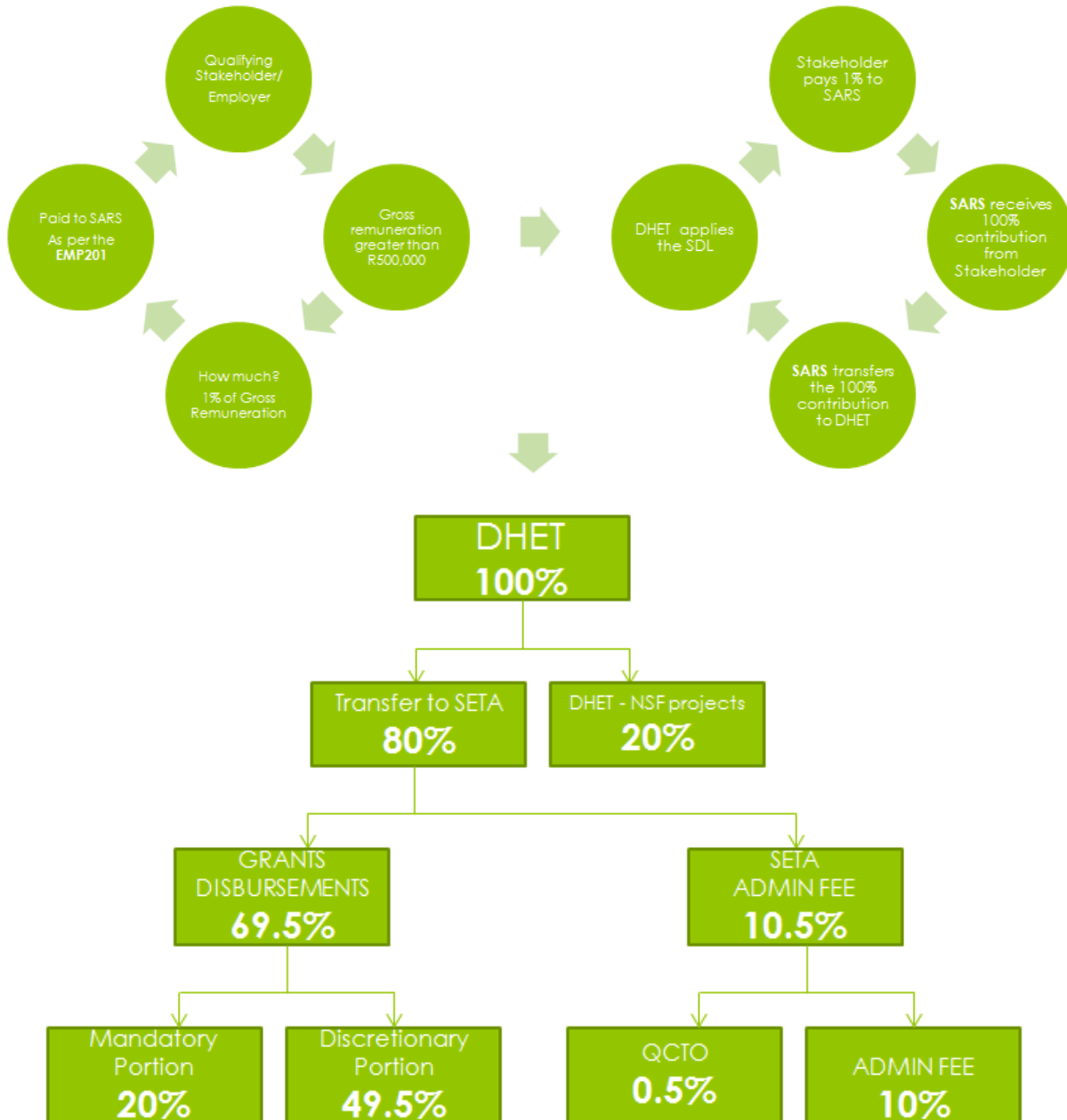


**WSP/ATR/PTP/PTR SUBMISSION INFORMATION**

**2015**

## THE SKILLS DEVELOPMENT LEVY (SDL) BREAKDOWN

For entities that have an annual payroll of R500 000 or more are required to pay 1% of their annual payroll as SDL via the EMP201. The SDL is administered as per the below.



## **Frequently Asked Questions**

### **1. What is a WSP/ATR?**

A Workplace Skills Plan (WSP) is a strategic document that articulates how the employer is going to address the training and development needs in the workplace. This process should be an all-inclusive one. The employer should consult with all employees or representatives, irrespective of their levels or rank in the company.

The Annual Training Report (ATR) is an accurate account of all training that has taken place in the reporting period within the organisation.

### **2. When do I need to submit my WSP/ATR?**

The WSP and ATR data needs to be submitted to the relevant SETA between 1 April and 30 April each year; this is a legislated date and is enforced throughout all SETA's.

### **3. What periods do I report on for my WSP/ATR?**

The Workplace Skills Plan is an annual training plan starting from the first of April in the current year, until the end of March in the following year, e.g. 1 April 2015 – 31 March 2016.

The Annual Training Report is an annual report of training that has taken place from the First of April of the previous year, to the end of March in the current year, e.g. 1 April 2014 – 31 March 2015.

### **4. Why should I submit a WSP/ATR?**

The Workplace Skills Plan serves to structure the type and amount of training for the year ahead, and is based on the skills needs of the organisation. A good WSP should consider current and future needs, taking into account gaps identified through a skills audit, the performance management system, succession planning initiatives, and any new process or technology changes planned for the year. Management discusses the company's goals with employees who in turn commit to the process of achieving these goals. Management gets the opportunity to discover talent as well as skills that they did not know that they had.

The WSP/ATR submission provides access to the mandatory grant, as well as discretionary grants advertised by the SETA. This data provides the SETA with insight into its specific industries to better equip them to provide further development and support to its stakeholders. WSP and ATR submission also enables a company to receive points for BEE purposes.

### **5. What is an SDF?**

Description Skills Development Facilitator (SDF) is a resource appointed by the employer to assist with SETA related duties. Rolls of the SDF are to compile and submit WSP and ATR information to

the relevant SETA in line with the requirements of the specific SETA, as well as assist with implementation of the WSP.

**6. Where do I submit my WSP/ATR information and what system are you using to submit your WSP/ATR?**

The Services SETA makes use of the Skills Development Management System (SDMS) for electronic submission of all WSP and ATR data. The SDSM is an online system and can be accessed via <http://www.sseta-live-serviceseta.org.za>

**7. Do I need to be registered with a SETA to submit a WSP/ATR?**

Yes and No, WSP and ATR's need to be submitted to the SETA that your company has been registered under, however NPO, NGO or an exempted companies may submit their information via the SDMS system by allowing the system to generate a Non Levy Paying (NLP) number.

**8. Can I report on training if a candidate is not found competent?**

Yes, a company may report on any training that has taken place within the organisation regardless of the outcome, as well as internal and informal training. All training reported on will need to be able to be supported by proof of the intervention taking place.

**9. What happens if I plan for training but it is not realised?**

The Services SETA will not penalise employers for not reporting on information that was planned in a previous year. However reports need to be completed as accurately as possible.

**10. Where do I get my SDL number from?**

A company's SDL number is allocated by SARS, and may be obtained from the nearest SARS office.

**11. What is the mandatory grant percentage break down?**

As legislated by the Skills Developments Levies Act, the mandatory grant is set at a maximum of 20 percent of the Skills Development Levy (1 percent of the company's annual payroll) paid by the company, which is accessible through submission of a WSP and ATR.

**12. I want to capture a mandatory grant application but my organization is not in the system?**

If the SDMS does not recognise your SDL number and you have confirmed your registration with the Services SETA, a Non Levy Paying (NLP) number may be generated to complete the submission while the system gets updated.

**13. What is the qualifying criterion for paying SDL?**

Any company that pays more than R500 000 on its annual payroll automatically qualifies to pay a Skills Development Levy and is eligible for a mandatory grant payback on submission of WSP/ATR.

**14. How do I calculate Internal and external training?**

External training is calculated via invoices paid for training received and needs to be supported by an invoice for the training.

Internal training may be calculated per person by the following formula:

$(\text{Hourly rate of staff member trained}) \times (\text{No. Hours trained}) / (\text{No. Staff trained}) = \text{Average cost pp}$

**15. What other supporting documents do I need to submit my WSP/ATR?**

Along with invoices, the Services SETA requires the Authorisation page (obtainable via the SDMS) to be completed by the SDF and company, a cancelled check or bank verified banking details of the company, and Annexure C (obtainable via the SDMS) completed with a summary of training reported on.

**16. How do you classify a company's size?**

Companies are classified in the following way for the SETA's:

Small: 1 – 49 permanent employees

Medium: 50 – 149 permanent employees

Large: 150+ permanent employees

**17. Where can I go for WSP assistance?**

Assistance for WSP/ATR submission is offered by the Services SETA Mandatory Grant division through workshops and one on one support, as well as the nearest Services SETA regional office. Assistance may also be found via the Services SETA website and the SDMS. Please ensure assistance is requested timeously, as there is no guarantee of response near the deadline date.


**18. What is PIVOTAL Training and how do I report it?**

PIVOTAL (Professional, Vocational, Technical and Academic Learning) is any formal training that leads to a learner achieving a full qualification, such as a certificate, diploma, Degree, etc. This training is reported in the same way as the normal training, but just marked as PIVOTAL in the WSP/ATR submission.

# THE WSP/ATR SUBMISSION – THE SKILLS DEVELOPEMNT MANAGEMENT SYSTEM (SDMS)

## STEP 1: Registration / Login

**Welcome to the  
Skills Development Management System**



Username:  **1**

Password:  **1**

[Need to reset your password? Click Here](#) **2**

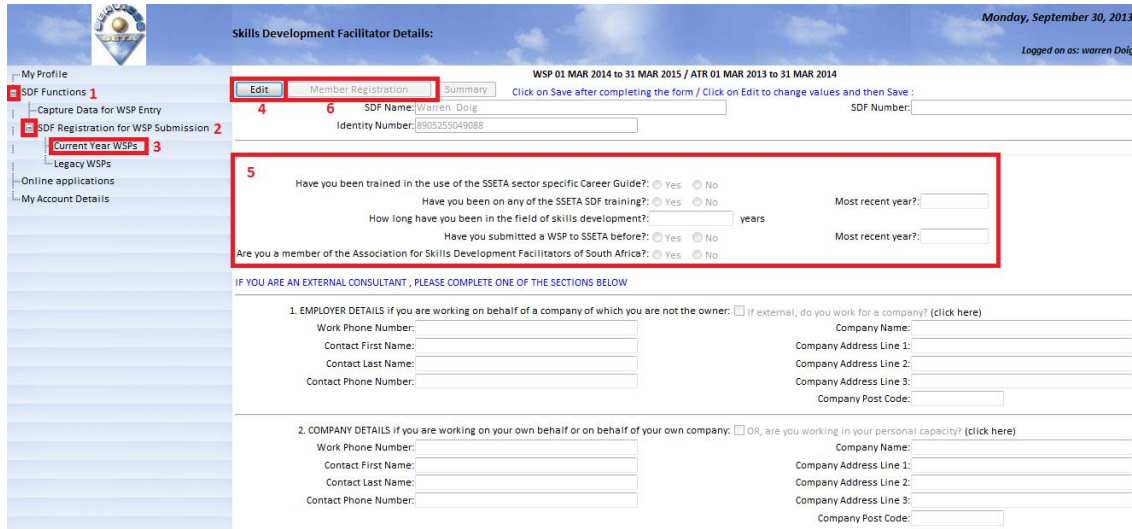
[If you are a new external user click here](#) **3**

Enter User Name and Password into relevant Fields (1), or create a new account using your email address (3).

If the email address has already been registered, you may reset your password to have a new one sent to the address (2).

Password criteria: Needs to be at least 6 characters long, at least one capital letter, needs to have at least 1 numeric digit, and one special character (~!#\$%^&\*()\_+) e.g.: Password0!

## STEP 2: SDF Information



Skills Development Facilitator Details: Monday, September 30, 2013  
Logged on as: warren Doig

WSP 01 MAR 2014 to 31 MAR 2015 / ATR 01 MAR 2013 to 31 MAR 2014

**4** SDF Name: Warren Doig **6** SDF Number:

Identity Number: 8905255049088

**5**

Have you been trained in the use of the SSETA sector specific Career Guide?:  Yes  No

Have you been on any of the SSETA SDF training?:  Yes  No

Most recent year?:

How long have you been in the field of skills development?:  years

Have you submitted a WSP to SSETA before?:  Yes  No

Most recent year?:

Are you a member of the Association for Skills Development Facilitators of South Africa?:  Yes  No

IF YOU ARE AN EXTERNAL CONSULTANT, PLEASE COMPLETE ONE OF THE SECTIONS BELOW

1. EMPLOYER DETAILS if you are working on behalf of a company of which you are not the owner:  If external, do you work for a company? (click here)

Work Phone Number:  Company Name:

Contact First Name:  Company Address Line 1:

Contact Last Name:  Company Address Line 2:

Contact Phone Number:  Company Address Line 3:

Company Post Code:

2. COMPANY DETAILS if you are working on your own behalf or on behalf of your own company:  OR, are you working in your personal capacity? (click here)

Work Phone Number:  Company Name:

Contact First Name:  Company Address Line 1:

Contact Last Name:  Company Address Line 2:

Contact Phone Number:  Company Address Line 3:

Company Post Code:

Once logged in, go to Current Year WSP by using the (+) button to drop down the “SDF Functions” menu (1), then (+) button to drop down the “SDF Registration for WSP Submission” menu (2), then

Selecting “Current Year WSP’s” (3). Click the “Edit” button to open the page for editing (4), and answer the SDF questions (5). Once the questions are answered select the “Save” button that the “Edit” button would have changed into (4), then Select the “Member Registration” Button (6).

### **STEP 3: Member Registration**

The screenshot shows the 'Main Company Details' form. At the top, there are three buttons: 'Edit' (3), 'Add a Levy-paying Member' (1), and 'Add a Non Levy-Paying Company' (2). To the right of these buttons are 'Next' and 'Previous' buttons (4). Below the buttons, there are several input fields: 'SDL Number', 'Company Name', 'In which industry is this company involved?' (dropdown), and 'Services SETA regional office to which the submission is made:' (dropdown). The 'Physical Address' section includes 'Physical address line 1', 'Physical address line 2', 'Physical address line 3', 'Physical address postal code', 'Telephone Number', 'Cell Number', 'Fax Number', 'Email Address', and 'Province'. Below this, there are sections for 'Total number of employees for whom SDL levies are paid as at 31 MAR 2014', 'Total number of staff', 'Total annual payroll for the end of your last financial year', 'Total training spend', and 'Total PIVOTAL'. The 'Company Contact (other than SDF)' section includes 'Title', 'Firstnames', 'Surname', 'Designation', 'Telephone Number', 'Cell Number', 'Fax Number', and 'Email Address'.

Now you will be able to capture the companies you will be submitting a WSP/ATR/PTP/PTR for.

To add a company that is registered with the SSETA and had a SDL number, use the “Add a Levy-paying member” button (1), if the company is not registered with the SSETA yet, or does not have an SDL number you will be able add the company using it’s CK number by selecting “Add a Non Levy-Paying Company” Button (2).

Once one of these buttons has been selected you will be taken to a new screen prompting you to enter the SDL number or CK number, enter the number select the “Save” button, the companies details will be shown and if it is the correct company displayed, confirm this by selecting the “Please confirm by clicking here that this is the correct company” button and you will be brought back to the Member registration page with the companies details now displayed.

Complete the companies details by selecting the “Edit” button (3) and entering the required information in the fields then selecting the “Save” button (3).

If you have more than one company, you may add them the same way, and switch between companies using the “Next” and “previous” button (4).

Once all the main company details are completed and saved, you may proceed to the below image.

The screenshot shows a web interface for WSP/ATR registration. At the top right is a button labeled "Back to SDF Details". Below it is a navigation bar with four tabs: "Main Company Details", "Secondary Companies Included" (marked with a red box and number 3), "Training Committee" (marked with a red box and number 2), and "Submit Registration for WSP" (marked with a red box and number 1). The main content area has a header with the text "WSP 01 APR 2015 to 31 MAR 2016 / ATR 01 APR 2014 to 31 MAR 2015". Below this are two input fields: "Main SDL Number:" and "Company Name:". A central instruction reads: "All sections must be completed before you can Print the Declaration or Submit: Note that once you have submitted the WSP/ATR you may not change the values in these screens. Each main company must be submitted separately and a separate Declaration and Verification document must be printed and forwarded to Services SETA." Below the instruction are several sections: 1. "Print blank Authorisation Form" and "Print Addendum C Form" (grouped with a red box and number 5). 2. "Load Signed Authorisation Form" (red box and number 4), "Load banking details" (red box and number 7), and "Load Proof of Expenditure (multiple)" (red box and number 7). 3. A list of completion checkboxes: "SDF detail completed" (checked), "Main company details completed" (checked), "Secondary companies added" (checked), and "Training committee completed" (checked) (grouped with a red box and number 4). 4. "Authorisation Form Loaded" (checkbox), "Banking details loaded" (checkbox), and "Proof of Expenditure loaded" (checkbox) (grouped with a red box and number 8). 5. Three "Browse..." buttons (grouped with a red box and number 6). 6. "Add another Levy-paying Member" (checkbox) and "SUBMIT FOR REGISTRATION" (red box and number 9).

Once the Main Company details page is complete and saved, you will need to complete the “Secondary Companies included” tab (3) on the image below, where you may add levy numbers that fall under your main levy number if applicable, the Training committee tab (2), which is mandatory for companies that have more than 49 permanent employees, and then go to the “Submit and Print Verification Document” tab (1), below.

If all relevant information has been entered you should have 4 ticked blocks (4) that relate to the specific page, if a block is not ticked, revert back to the relevant tab and complete the information.

Once all blocks are ticked you will be able to generate your Authorisation form and Addendum C (5), the Authorisation form needs to be signed by all relevant parties, and Addendum C may be completed with a summary of training completed, which may be used in instead of training invoices and registers. The “Browse” buttons (6) will be used to search for the copies of the Authorisation form, Proof of banking details (cancelled check or bank stamped letter) and the proof of training (addendum C, or invoices and registers as proof), before they are loaded into the system via the buttons labelled (7). Ensure the 3 tick boxes (8) are ticked once the documents have been loaded. Once the documents show as loaded the Submit for registration button (9) will be active and must be pressed, to registered the company for submission and allow the user to complete the online WSP/ATR/PTP/PTR.



## STEP 4: Upload WSP

The screenshot displays a web application interface for uploading WSP information. On the left is a navigation menu with 'My Profile' at the top, followed by 'SDF Functions' containing 'Capture Data for WSP Entry' (1), 'SDF Registration for WSP Submission', 'Current Year WSPs', and 'Legacy WSPs'. Below this are 'Online applications' and 'My Account Details'. The main area has a top navigation bar with tabs: 'Employees' (2), 'Training Interventions' (8), 'Training completed and planned' (9), and 'Submit' (10). To the right of these tabs are buttons: 'Export To Excel' (5), 'Copy From Last Year' (6), 'Save' (7), 'Delete', and 'Back'. Below the tabs is a search section with a 'Go' button (4), an 'SDL No:' dropdown menu (3) containing 'L770762849', and an 'Employee ID:' dropdown menu. The main content is a table with the following columns: 'SDL No', 'Employee No', 'Employee ID', 'ID Type', 'First Name', 'Last Name', 'Birth Date(yyyy/mm/dd)', 'Gender', and 'Equity'. The first row (1) has 'L770762849' in the 'SDL No' column. The table has 23 rows in total. At the bottom, there is a status bar showing 'Employees'.

You will now have access to capture your WSP/ATR/PTP/PTR information, to do this select the “Capture Data for WSP Entry” link (1).

You will be taken to the Employee information tab (2) below. To capture information, select the SDL Number (3) and select the “Go” button (4). You may enter information directly into the sheet by typing or using the drop down menu’s, or copying and pasting information into the sheet from an excel document (please note that the window will not allow you to right click, so please use the “ctrl” + “v” buttons to paste, and “ctrl” + “c” to copy.

If you have submitted information via the online system in the previous period, you may select the “Copy from Last Year” button (6) to import this information and update what is necessary.

You may also export the entered information to an Excel document by selecting “Export to Excel” (5).

Please ensure you continuously use the “Save” button (7) as this will save your information and also show any data that may have an error. It is advisable to save after ever line of entry.

On the Employees tab, you need to enter the required information for each employee that has received training (ATR, PTR) or that will receive training in the following period (WSP, PTP).

Once the employee tab is completed you will also need to complete the “Training Intervention” tab (8) where you need to enter the information of the training programmes that have taken place (each program only needs to be entered once, for each unique training intervention), and also the “Training completed and planned” tab (9), where you need to link the employees that have been captured and the training interventions together and select where the training is part of your WSP or ATR.

Once your WSP/ATR/PTR/PTP information has been captured you may follow the “Submit” tab (10).

## The "Submit" Page

Employees Training Interventions Training completed and planned Submit

WSP 01 MAR 2014 to 31 MAR 2015 / ATR 01 MAR 2013 to 31 MAR 2014  
And  
PIVOTAL TRAINING PLAN 01 MAR 2014 to 31 MAR 2015 / PIVOTAL TRAINING Report 01 MAR 2013 to 31 MAR 2014

SDL Number: L770762849 Company Name: CLASSY TRADE AND INVEST 1224 CC

All Sections must be completed before you can submit Note that Once you Submit , changes cannot be made to this data

Print Draft WSP-ATR 1 Submit 2

No. of employees: 0  
No. of interventions: 0  
No. of employees training achieved/enrolled: 0  
No. of employees training planned: 0

On the Submit page you may view your draft WSP generated from your data entry (1), and once you are happy with the information, submit it to the SSETA by selecting the "Submit" button (2).

### Original Documentation

Original Proof of banking details, Proof of Expenditure/Training (Addendum C, or supporting invoices and training registers) and Authorisation form are **no longer required** to be delivered, but should be kept on hand by the main company in case of an audit by the Services SETA.

### Mandatory Grant Payment

Quality Assurance of the proof of banking details, proof of expenditure, and the signed authorisation form that have been uploaded via the registration process will take place before Mandatory Grant payment. If any document is found to be incomplete or incorrectly uploaded the Mandatory Grant cannot be processed by the Services SETA. Once documents have been found compliant the WSP/ATR data can be accepted by the SSETA and the entity will be handed over for payment to take place.

For companies that have added "secondary companies" in the registration process, the "secondary companies" levies will be added to the "main" company's mandatory grant payment, and will not be paid the secondary companies.

## HOW TO USE THE WSP TEMPLATE (EXCEL AND ONLINE)

1. The “Employees” Tab, complete all fields with employee information, you may add all your employees, but only the employees that have been on training and will receive training are required. You may only put each employee on the sheet once, please do not duplicate ID number or Employee numbers as this sheet is a reference page only. Allocation of employee numbers can be used through actual employee numbers or non-real employee number (e.g. numbering 1, 2, 3, ...), but these are used at a later stage to reference back to the employee.
2. The “Training Interventions” Tab, is for all training interventions that have taken place and will take place, you only need to insert each intervention once even if multiple employees have attended it or will attend it (interventions may be entered multiple times at the discretion of the SDF) as this page is also a reference page for later use. In this spreadsheet it asks for a cost of the intervention, this is a **cost per learner**, so if you have for example 10 learners that went on training and the total cost was R10 000, you will enter the cost as R1 000 (R10 000 / 10). There is also a section for intervention number, this is similar to the employee number, it is used to reference the interventions and these need to be unique.
3. The “Training completed and planned” Tab, this is where you compile the actual WSP and ATR information, there is place for the employee number, intervention number, dates and status. All you need to do is now link the employees from “Employees” tab to interventions from “Training Interventions” tab using the employee numbers and intervention numbers that have been allocated, and state under status if the learner is enrolled, achieved or planned for this intervention. Achieved will place the line of information into your ATR, Planned into your WSP, and enrolled means that they have started the intervention during the ATR period but carry over into your WSP period, you can also split learners in this case over two lines, one for achieved and one for planned, indicate the dates the training took place or will take place. You will see columns for name and ID of learner and title of intervention, but it is not necessary to complete this as once it is in the system it will reference back to your previous tabs and pull information from there.

The excel spreadsheet contains a grey block of information that must be used for options throughout this process, as the online system uses these as drop down menus, and will reject any information that is not in line with this. Only columns that indicate “\*Text field” **do not** have specific information that needs to be selected.

Columns highlighted in Blue are not mandatory, however some fields like date of birth and gender are not mandatory due to that information being gathered from South African National ID numbers entered, if a passport or other form of identification is used, you will need to manually enter this data. If the information for non-mandatory field is available it is preferred that it is included.

## WSP WORKSHOP DATES

If you should wish to attend a WSP workshop presented by the mandatory grant department,  
please contact you nearest regional office to book for one of the below dates.

<u>PRESENTER</u>	<u>Marc-Leigh Alexander</u>	<u>Warren Doig</u>	<u>Sibusiso Selepe</u>
<u>DATE</u>	<u>REGION</u>		
24 February 2015, Tuesday	Durban	Gauteng	East London
25 February 2015, Wednesday	Bloemfontein	Polokwane	Kimberly
26 February 2015, Thursday	Cape Town	Nelspruit	Gauteng
27 February 2015, Friday	Cape Town	Port Elizabeth	Gauteng
2 March 2015, Monday	Cape Town	Polokwane	Gauteng
3 March 2015, Tuesday	Cape Town	Nelspruit	Gauteng
4 March 2015, Wednesday	Cape Town	Bloemfontein	East London
5 March 2015, Thursday	Durban	Bloemfontein	Port Elizabeth
6 March 2015, Friday	Durban	Kimberly	Port Elizabeth
9 March 2015, Monday	East London	Port Elizabeth	Gauteng
10 March 2015, Tuesday	East London	Port Elizabeth	Gauteng
11 March 2015, Wednesday	East London	Port Elizabeth	Gauteng
12 March 2015, Thursday	Durban	Cape Town	Bloemfontein
13 March 2015, Friday	Durban	Cape Town	Bloemfontein
16 March 2015, Monday	Cape Town	Kimberly	Polokwane
17 March 2015, Tuesday	Cape Town	Kimberly	East London
18 March 2015, Wednesday	Cape Town	East London	East London
19 March 2015, Thursday	Nelspruit	Port Elizabeth	Gauteng
20 March 2015, Friday	Nelspruit	Port Elizabeth	Gauteng
23 March 2015, Monday	Durban	Gauteng	Kimberly
24 March 2015, Tuesday	Durban	Gauteng	Kimberly
25 March 2015, Wednesday	Port Elizabeth	Gauteng	Bloemfontein
26 March 2015, Thursday	Cape Town	Gauteng	Bloemfontein
27 March 2015, Friday	Cape Town	Gauteng	Polokwane
30 March 2015, Monday	Durban	Bloemfontein	Gauteng
31 March 2015, Tuesday	Durban	Bloemfontein	Gauteng
1 April 2015, Wednesday	Durban	Cape Town	Gauteng
2 April 2015, Thursday	East London	Cape Town	Gauteng
7 April 2015, Tuesday	Pietermaritzburg	Gauteng	Cape Town
8 April 2015, Wednesday	Pietermaritzburg	Gauteng	Cape Town
9 April 2015, Thursday	Richards Bay	Gauteng	East London
10 April 2015, Friday	Richards Bay	Gauteng	East London
13 April 2015, Monday	Cape Town	Durban	Gauteng
14 April 2015, Tuesday	Cape Town	Durban	Gauteng
15 April 2015, Wednesday	Cape Town	Durban	Gauteng
16 April 2015, Thursday	Cape Town	Durban	Gauteng
17 April 2015, Friday	Cape Town	Durban	Gauteng

## **GENERAL INFORMATION**

### **Website Addresses**

Service SETA home page: <http://www.serviceseta.org.za/>

SDMS (Skills Development Management System): <http://sseta-live.serviceseta.org.za/>

### **Reporting Periods**

WSP (Plan): 1 April 2015 – 31 March 2016

ATR (Report): 1 April 2014 – 31 March 2015

### **Submission Deadline**

30 April 2015 (need formal request for one month extension, 31 May 2015, no promise of approval)

### **Cost of Training Calculation**

Internal Training: (Add hourly rate of staff trained) x (No. Hours trained) / (No. Staff trained)

= Average cost pp

External Training: As per invoice

\*Costs must be calculated per person

### **Contact Details**

#### **WSP Support**

Warren Doig: [warrend@serviceseta.org.za](mailto:warrend@serviceseta.org.za)

Marc-Leigh Alexander: [marca@serviceseta.org.za](mailto:marca@serviceseta.org.za)

Sibusiso Selepe: [Sibusisos@serviceseta.org.za](mailto:Sibusisos@serviceseta.org.za)

#### **SETA and SIC code changes (IST-O1)**

Theo Mufamadi: [NdivhuwoM@serviceseta.org.za](mailto:NdivhuwoM@serviceseta.org.za) (011 276 9625)

#### **Management**

Paul Dhlamini: [Pauld@serviceseta.org.za](mailto:Pauld@serviceseta.org.za) - 011 276 9743 (Senior Manager)

Tebello Mokoena: [tebellom@serviceseta.org.za](mailto:tebellom@serviceseta.org.za) - 011 276 9605 (Customer Care)

Extension Email Address [WSPextension@serviceseta.org.za](mailto:WSPextension@serviceseta.org.za)