

# **Integrated Management System (IMS) User Manual for Mandatory Grants**

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## 1. ACCESSING THE SYSTEM

The Integrated Management System (IMS) is the primary online platform that is used by CHIETA to interact with stakeholders. The platform incorporates all Grant applications processes (Discretionary and Mandatory Grants), Learner Management, Stakeholder Management (Skills Development Providers, Employers, Skills Development Facilitators, Moderators, Assessors, etc.).

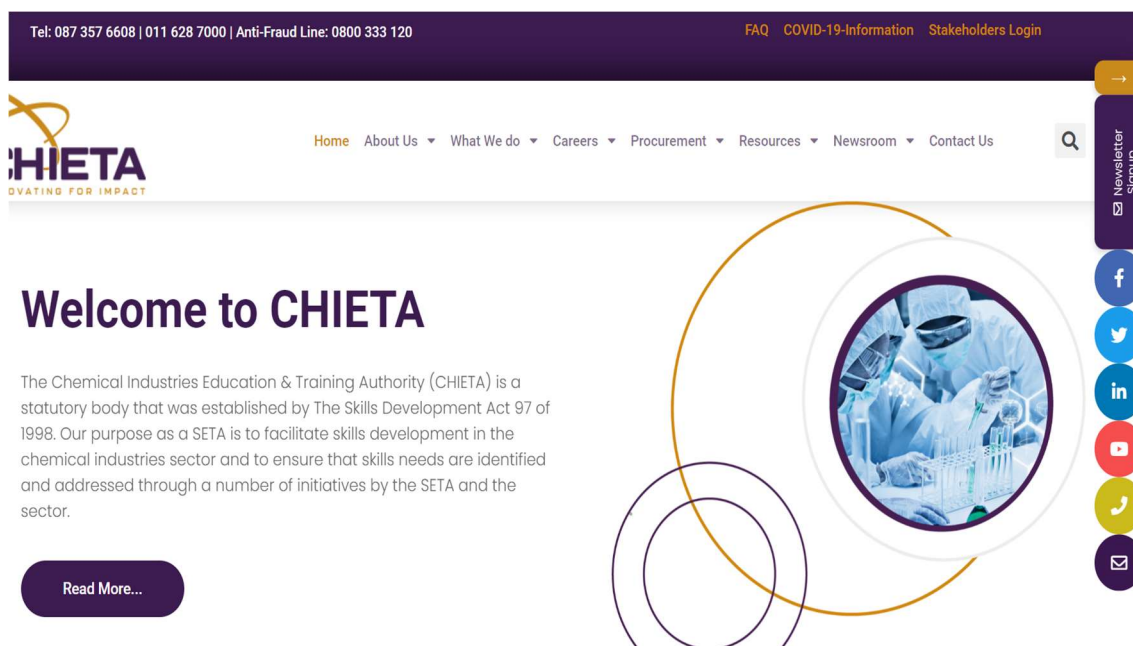
### 1.1 Access

Access to the system is by through the system address (<https://ims.chieta.org.za>) from the CHIETA website or directly by keying in the address on any web browser.

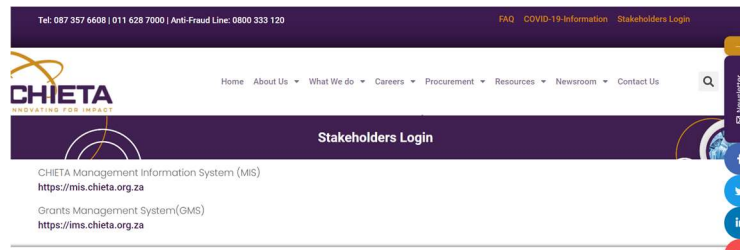
The system is compatible with any web browser of your choice, and it may also be accessed through Handheld devices.

From the Website:

Go to [www.chieta.org.za](http://www.chieta.org.za)



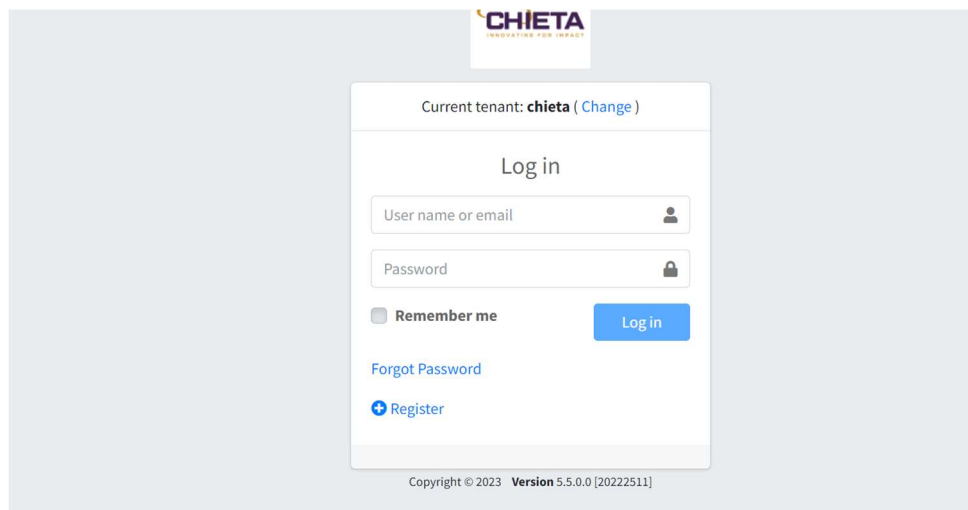
1. On our web page click “Stakeholders Login” on the top left of your screen, then it will direct you to the next page.



2. To log into the mandatory Grants system, click on link below Grants Management System (GMS) or use this link for alternative logging in “<https://ims.chieta.org.za>”

## 1.2 Logging In

This is the layout of the system (IMS) where user will be apply to apply for Mandatory grants.



1. To start the SDF registration process user can click “Register” or login if they have already accessed the system before.
2. SDFs can also recover the passwords by click on “Forget Password” function.

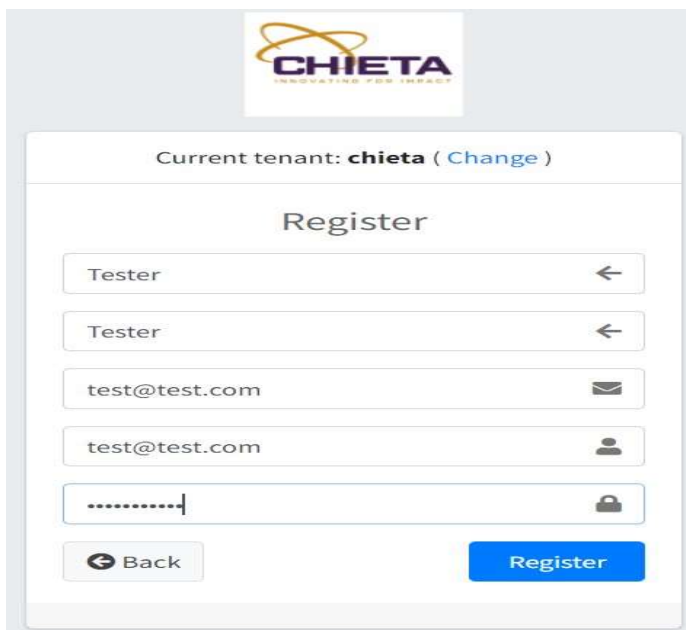
## 2. SDF REGISTRATION

### 2.1 SDF Details

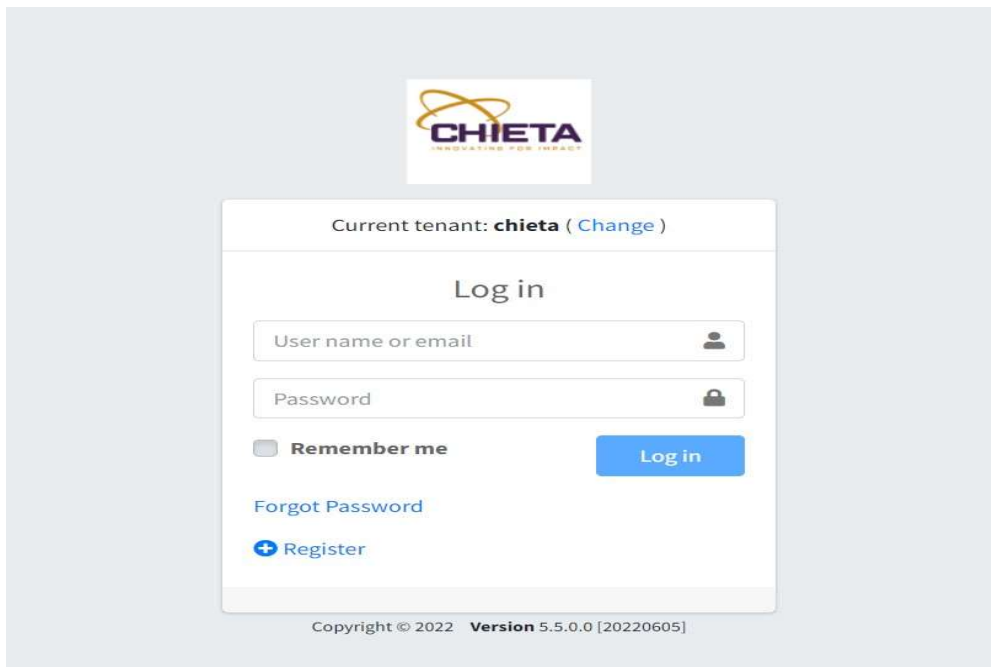
The Registration process starts on the Login Page. All new users will start with a User Registration.

#### User Registration

1. If you do not have login details to access the system, on the Login Page, click on Register button.
2. Complete your details on the Registration Form and click on Register to complete.
3. You can use your email as your Username.



The screenshot shows the CHIETA User Registration interface. At the top, the CHIETA logo is displayed. Below it, the text "Current tenant: chieta ( [Change](#) )" is visible. The main heading is "Register". The form contains five input fields: two for "Tester" (with a left arrow icon), one for "test@test.com" (with an envelope icon), another for "test@test.com" (with a person icon), and one for a password (with a lock icon and masked characters "....."). At the bottom, there are two buttons: a "Back" button with a left arrow icon and a blue "Register" button.



CHIETA

Current tenant: **chieta** ( [Change](#) )

**Log in**

User name or email

Password

☐ Remember me [Log in](#)

[Forgot Password](#)

[+ Register](#)

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4. You will be taken to the Login screen where you can proceed with the SDF Registration process. The landing page presents the profile buttons for the profiles that are available for you to activate.

The profiles are color coded as follows:

**Red:** The profile has not been activated. This means that you have not completed the SDF Registration Process. Press 'Complete Submission' to finalize.

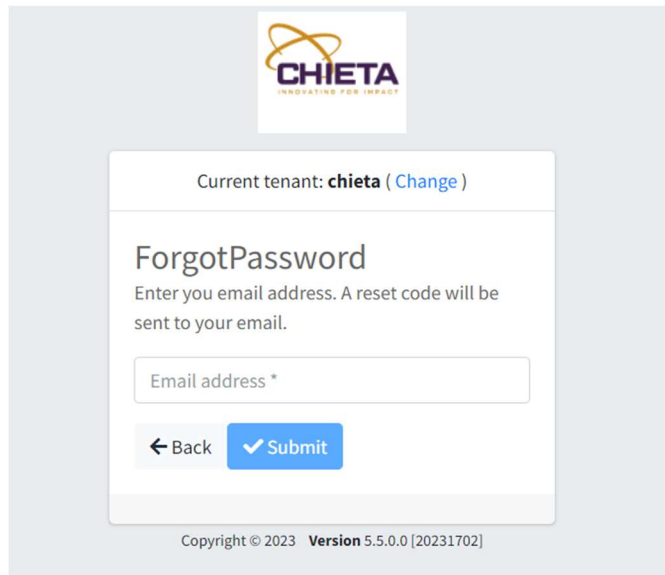
**Green:** The profile has been activated; you can proceed to access your profile.

5. To proceed with SDF Registration or to access your SDF Profile, click on the profile button.

### Forgot Password

If you already have an account but you have forgotten your password, follow these steps:

1. On the Login page, click on 'Forgot Password.'
2. You will then be prompted to enter your email address.
3. A Password Reset code will be sent to this email address.



CHIETA  
INNOVATING FOR IMPACT

Current tenant: **chieta** ([Change](#))

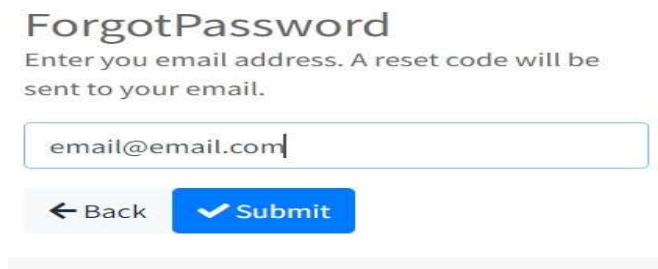
### ForgotPassword

Enter you email address. A reset code will be sent to your email.

Email address \*

[← Back](#) [✓ Submit](#)

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### ForgotPassword

Enter you email address. A reset code will be sent to your email.

email@email.com

[← Back](#) [✓ Submit](#)

6. Once you click on Submit, please check on your email for the Code before you can complete the next step.
7. Once you receive your reset code on your email, complete the details on the provided Reset screen.

INNOVATING FOR IMPACT

Current tenant: **chieta** ([Change](#))

## Reset Password

**Email Address \***

**Password Reset Code \***

Check your Email for the Code

**New Password \***


**Confirm New Password \***


[Save](#)

8. Once you get confirmation of the Password reset, you will be redirected to the Login screen where you can now login with the new password.
9. If your **SDF profile is Not Active** (still **Red**), do the following steps:
  1. Click on the Red SDF profile.
  2. A SDF Registration screen will appear.




## Home page

 Use this dashboard to activate profiles to access the system. A



**SDF**  
Skills Development Facilitator

Activate Profile 

### Notifications

Title	Details
-------	---------


10. You are required to capture your details on this screen. All mandatory fields must be captured before you proceed.

<b>Designation</b> <input type="text" value="SDF"/>	<b>Title</b> <input type="text" value="Mr"/>	
<b>Firstname</b> <input type="text" value="Tester"/>	<b>Middle names</b> <input type="text" value="Tester"/>	<b>Lastname</b> <input type="text" value="Tester"/>
<b>ID Type</b> <input type="text" value="SA ID Number"/>	<b>SA ID Number</b> <input type="text" value="xxxxxxxxxxxx"/>	<b>Passport Number</b> <input type="text"/>
	<div>⊗ The Id Number is invalid.</div>	
<b>Phone</b> <input type="text" value="0110110111"/>	<b>Cellphone</b> <input type="text" value="0820000000"/>	<b>Email</b> <input type="text" value="test@test.com"/>

---

Optional

<b>Date of Birth</b> <input type="text" value="05/13/2022"/>	<b>Gender</b> <input type="text" value="Male"/>	<b>Equity</b> <input type="text" value="Coloured"/>
<b>Language</b> <input type="text" value="xiTsonga"/>	<b>Nationality</b> <input type="text" value="South Africa"/>	<b>Citizenship</b> <input type="text" value="South Africa"/>

 Save

11. Click on Save once, you are done. This is required to activate the address details.

## 2.2 Addresses

### 1. Physical Address

To capture the Physical Address:

- i. Type in your Complex/Street Number on first line.
- ii. Type in your Street Name on the second line.
- iii. Key in your Post Code. This will assist in completing the rest of the address details. In some cases, all the details are completed once you key in the Post Code. In other cases, you may need to select the Suburb and/or area if it is not automatically populated. Care should be taken in providing the correct Post Code.
- iv. Once all fields are populated, click on Save.

Complex/Street No  
100 Complex Name

Street  
50 Small Street

Post Code  
2195

Suburb ▾

Area ▾

District  
City of Johannesburg ▾

Municipality  
Johannesburg Metro ▾

Province  
Gauteng ▾

Save

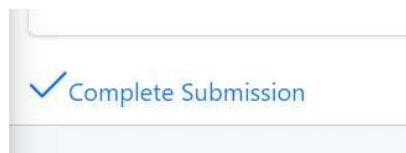
2. Capture the Postal Address. This is optional. The system provides:

Capture your Postal Address.

☒ Same as Physical

an option to use the Physical Address or the postal address.

3. To complete the SDF Registration, click on “Complete Submission”. The application will not be complete if this step is not done.



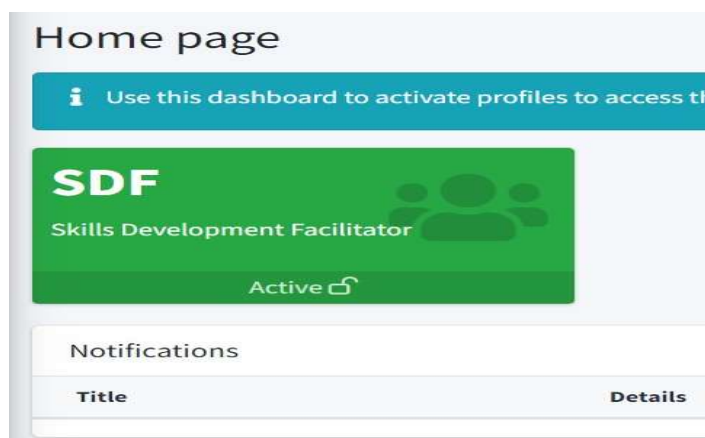
If the SDF Profile button is still Red, this step has not been done. This button is at the bottom of the screen.

4. After this step, you will be taken back to the landing page. The Profile button will turn Green.

### 3. LINKING AN ORGANISATION

#### 3.1 Linking Organisation to SDF Profile

1. When your profile has been activated (**Green**), click on the Profile button to access your company list.



2. The Linked Organisations screen lists all the Organisations for which you can apply for



Grants.

## Linked Organisations

**i** List of Companies linked to you. You can add companies by clicking Link button

	SDL No.	Organisation Name	Tr.
No organisations found.			
Showing 0 to 0 of 0 en			

To add an Organisation to your profile, follow these steps:

Click on the “Link” button on the top right corner of your screen.

This will open up the Organisation Search popup screen. This is where you can search for the Organisation you would like to link to your profile. You can do a search on three (2) key fields:

- (i) Skills Development Levy number (SDL).
- (ii) Organisation Name or Trade Name.
- (iii) Company Registration Number.


You can search using a part of the name, or registration number. For more accurate searches, it is recommended that you provide as much of the search string as possible.

### Link an Organisation

**i** Search for the Company to be linked and select add to link it. You can search by SDL, Name, or Registration Number.

SDL No.	Organisation Name	Trade Name	Registration Number.	SARS Status	
N030000032	Sipho 10	Sipho 10	2010/01245/07	Active	<input type="button" value="Add"/>

Showing 1 to 1 of 1 entries << < 1 > >> 10

5. Once you have located the Organisation you would like to link, click on the Plus sign  to link the Organisation to your profile.

## 4. MANDATORY GRANT APPLICATION PROCESS

### 1.1 Initiating the Mandatory Grant Application

1. On the Linked Organisation screen, each organisation has an action button.



This is to initiate a Grant Application.


2. Click on the Action button and Select “Mandatory Grants”.
3. If you have not yet uploaded the SDF Appointment Letter, you will get a popup message prompting you to upload the SDF Appointment Letter.
4. The SDF Appointment Letter is required before proceeding to the Applications.



Click on Yes to proceed and upload the SDF Appointment Letter.


5. To upload the letter, do the following:
  - i. Click on “Choose” to locate the file on your device. PDF files are recommended for uploading.
  - ii. Choose the Appointment Letter to upload.
  - iii. Click on Upload to complete the upload of the Letter.

6. The System will confirm the upload. There is an option for Downloading the Letter if you would like to confirm that you have uploaded the correct Letter. You can also Delete the Letter if it is incorrect and upload the correct one.

 Upload a signed SDF appointment letter on a company letterhead.

Appointment Letter \*


+ Choose

 Upload



✕ Cancel

SDF App  
ointmen  
t.pdf

34.259  
KB







SDF Appointment.pdf






 


7. When you upload has been done, you can proceed to the Mandatory Grants Applications screen.
8. To start the process, click on the “Mandatory Grants” sub dropdown.

## 4.2 Organisation Details

Linked Organisations			
<i>i</i> List of Companies linked to you. You can add companies by clicking Link button.			
<div>  Clear           <input type="text" value="Search keyword"/> </div>			
	SDL No. 	Organisation Name 	Trade Name
 <div>           Appointment Letter            Mandatory Grants            Discretionary Grants            DeLink         </div>	N030000056	Demo Organisation	Demo Org.
Showing 1 to 1 of 1 entries <			

1. The Mandatory Grants Applications screen lists the Grants Applications that you have initiated for the selected Organisation.
2. To initiate a new Mandatory Grant within funding Window, click on the “Apply” button on the top right corner of the screen.

Mandatory Grant Applications					
<i>i</i> List of Mandatory Grants applied for. You can add a new application by clicking Apply button. You can only apply during a grant window period					
download documents(click to download)					
					 Apply
	Reference 	Title 	Date Submitted	Status 	Closing Date
	MG2023	Mandatory Grants 2023/24		Application	4/30/23, 11:59 PM
Showing 1 to 1 of 1 entries << < 1 > >> 10 ▾					

3. A popup will appear with all the open Mandatory Funding Windows. Click  on the Funding Window you would like to apply for. The Application will now be added to your list of Applications.



« Home

MG.	Description	Start Date	Close Date		
MG2023	Mandatory Grants 2023/24	2023-01-01T00:00:00	2023-04-30T23:59:59		

List of Mandatory Grants applied for. You can add a new application by clicking Apply button. You can only apply during a grant window period

Download documents(click to download)

4. You can now proceed to the Application forms, press Action button on the application and click on “Application”.

Apply

	Reference	Title	Date Submitted	Status	Closing Date
	MG2023	Mandatory Grants 2023/24		Application	4/30/23, 11:59 PM

Application

Showing 1 to 1 of 1 entries << < 1 > >> 10 ▾

5. There are Two (2) sub tabs that you will need to go through to complete the application. The tabs are as follows:

SDL: N030000056    Name: Demo Organisation    Trading: Demo Organisation

## Mandatory Grant Application

**i** Please complete all the tabs and all compulsory requirements in this section. Once all tabs are completed, press 'Submit the Application' to finalise.

Bulk Upload (Please use the CHIETA Template for Year 2023 to populate details and upload here)

[+ Choose](#)   [Upload](#)   [X Cancel](#)

Client Details   [Application Details](#)

SDF Details   [Organisation Details](#)   [Organisation Physical Address](#)   [Postal Address \(Optional\)](#)   [Bank Details](#)

**i** Please update the SDF details that have changed.

Designation   Title

SDF   Mr

6. Under Client Details there are several sub tabs which reads as follows:

i. SDF Details

- i. The details on this tab are the same details that you captured during the SDF Registration process. You can update any details that have changed and save the details.

ii. Organisation Details

- i. You will be required to update the Organisation details that are missing or have changed. All details on this tab should be completed or updated.

iii. Organisation Physical Address

- i. You are required to capture or update the Physical address of the Organisation.
- ii. Capturing the Post Code will enable you complete the rest of the address details.

iv. Postal Address

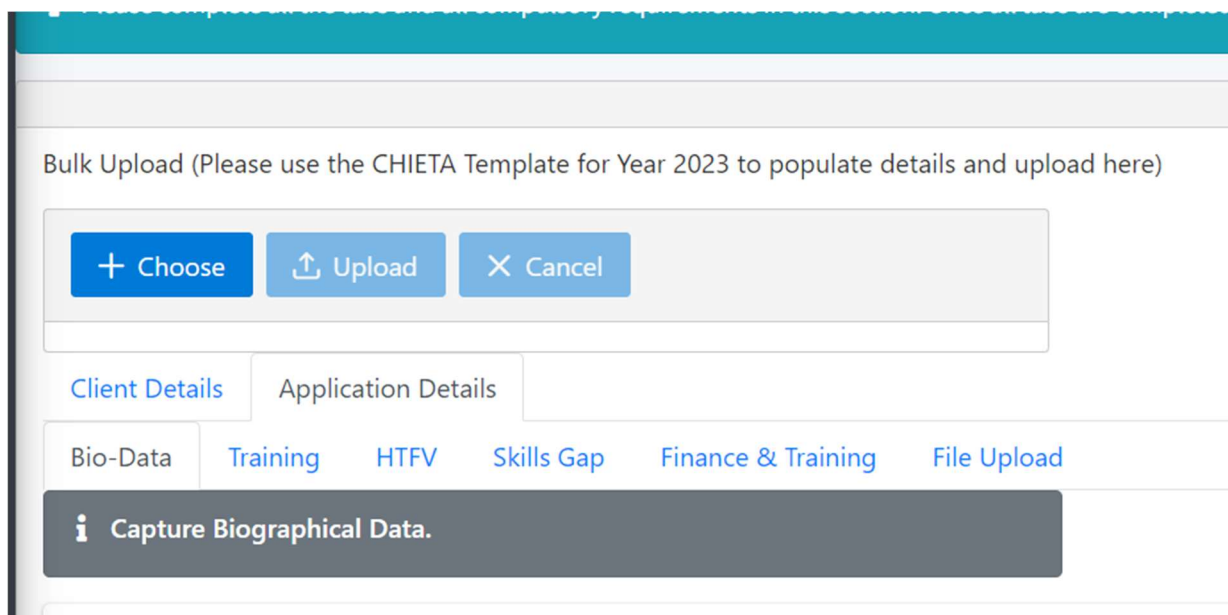
- i. This is an optional tab. You can also indicate if the Postal Address is the same as the Physical address by clicking on the switch on Postal Address.

### 4.3 Bank Details

1. You are required to capture the Bank Details that match your bank confirmation letter that should be provided.

### 4.4 Application Details

1. Use the Upload function above the tabs to submit/upload the “WSP template”. All the uploaded data(details) will populate on the rightful tables corresponding to sheet names provided on the WSP.
2. On the Application Details tab, there will be sub tabs.



Bulk Upload (Please use the CHIETA Template for Year 2023 to populate details and upload here)

[Client Details](#)
[Application Details](#)

[Bio-Data](#)
[Training](#)
[HTFV](#)
[Skills Gap](#)
[Finance & Training](#)
[File Upload](#)

**i Capture Biographical Data.**

### 3. Biodata

The details on this tab, you are required to capture the Biodata. You can update any details that have changed and save the details.

- i. All the details entered on Bio-data sheet will populate on the Bio-Data table after the uploading process, or you can use:-
  1. the “Add” button to manually enter details.
  2. The Delete All button removes all the entries.
  3. Once you have completed the capturing, you can validate your data by clicking on Validate Bio button.
  4. If there are any errors that were identified, you can click on the download button to download the errors to Excel.

Client Details Application Details

Bio-Data Training HTFV Skills Gap Finance & Training File Upload

**i Capture Biographical Data.**

	ID No	Passport	Firstname	Surname	Occupation
	8901123456081		Siphon	Mlotshwa	

Showing 1 to 1 of 1 entries << < 1 > >> 10

View  
Delete

- ii. -Use the menu item to view or delete the entered information
- iii. For edit or view purpose press the “view” option.

**Create Biographical Data**

SA Id Number: 8801235679081

Passport:

First Name: Siphon Middle Name: Thabo Surname: Mlotshwa

Birth Year: 1988 Gender: Male Equity: African

Disability: None Nationality: South Africa

Province: Gauteng Municipality:

Highest Qualification Type: Master's Degree

Employment Status: Permanent

Occupation Level: None Organisational Structure Filter: None Post Reference: None

Job Title: Developer OFO Occupation Code: 343102 OFO Specialisation: Air Observer

OFO Occupation: Air Observer

#### 4. Training Details

The details on this tab, you are required to capture the Training information. You can update any details that have changed and save the details.


- i. All the details entered on Bio-data sheet will populate on the Bio-Data table after the uploading process, or you can use the “Add” button to manually enter details.

Client Details Application Details

Bio-Data Training HTFV Skills Gap Finance & Training File Upload

**i Capture Training Details. Click Add to add a new Training**

**Add Delete All Validate Training**

	ID No	Passport	Programme Type	Programme	Status	Year
	8901123456081		Adult_Education_and_Training		Planned	2012

Showing 1 to 1 of 1 entries << < 1 > >> 10

**View Delete**

- ii. Use the menu item to view or delete the entered information and for edit or view purpose press the “view” option.

**Create Training Data**

SA Id Number: 8901123456081

Passport:

Program Type: Adult\_Education\_and\_Training

Learning Programme: Developer

Specialisation: Developing

Training Cost: 50000.00

Achievement Status: Planned

Year Enrolled/Completed: 2012

**Cancel Save**

## 5. Hard to fill vacancies

- i. The details on this tab, you are required to capture the HTFV information. You can update any details that have changed and save the details.
- ii. All the details entered on HTFV sheet will populate on the HTFV table after the uploading process, or you can use the “Add” button to manually enter details.
- iii. Use the menu item to view or delete the entered information and for edit or view purpose press the “view” option.

Client Details		Application Details															
Bio-Data	Training	HTFV	Skills Gap	Finance & Training	File Upload												
<div>  Capture Hard to Fill Vacancies. Click Add to add a new Vacancy         </div>																	
<div> <div>  Add            Delete All            Validate Training            </div> <table> <tr> <th></th><th>Occupation Code </th><th>Occupation </th><th>Primary Reason </th><th>Province </th><th>Vacancies</th></tr> <tr> <td></td><td>343102</td><td>Air Observer</td><td>COVID</td><td>Gauteng</td><td>12</td></tr> </table> </div>							Occupation Code	Occupation	Primary Reason	Province	Vacancies		343102	Air Observer	COVID	Gauteng	12
	Occupation Code	Occupation	Primary Reason	Province	Vacancies												
	343102	Air Observer	COVID	Gauteng	12												

## 6. Skills Gap

- i. The details on this tab, you are required to capture the Skills Gap information. You can update any details that have changed and save the details.
- ii. All the details entered on Skills Gap sheet will populate on the Skills Gap table after the uploading process, or you can use the “Add” button to manually enter details.
- iii. Use the menu item to view or delete the entered information and for edit or view purpose press the “view” option.

Client Details
Application Details

Bio-Data
Training
HTFV
Skills Gap
Finance & Training
File Upload

*i* Capture Skills Gaps. Click Add to add a new Gap

Add
Delete All
Validate Skills Gap

	Occupation Code	Occupation	Skills Gap	Reason
	252302	Transmission Engineer	4IR	Training Gap

## 7. Finance and Training

- The details on this tab, you are required to capture the Finance and Training information. You can update any details that have changed and save the details.
- All the details entered on Finance and Training sheet will populate on the table after the uploading process, or you can use the “Add” button to manually enter details.
- Use the menu item to view or delete the entered information and for edit or view purpose press the “view” option.

Client Details
Application Details

Bio-Data
Training
HTFV
Skills Gap
Finance & Training
File Upload

*i* Capture Finance and Training. Click Add to add a new Finance details

Add
Delete All

	Skills Development Spend	Projected Spend	Percentage Actual Spend	BENEFICIARIES Planned	Beneficiaries Trained
	50000	120000	0.8333333333333334		2



#### 4.5 Documents Uploads

1. You will be required to download the mandatory documents on the File Upload Section.
2. The mandatory documents are indicated by a red (\*) asterisk.
3. To upload a document:
  - i. Click on “Choose” to locate the file on your device. PDF files are recommended for uploading.
  - ii. Choose the File to upload.
  - iii. Click on Upload to complete the upload of the File.
  - iv. The System will confirm the upload.
  - v. There is an option for Downloading the File if you would like to confirm that you have uploaded the correct File. You can also Delete the File if it is incorrect and upload the correct one.

SDL: N030000056    Name: Demo Organisation    Trading: Demo Organisation

### Mandatory Grant Application

**i** Please complete all the tabs and all compulsory requirements in this section. Once all tabs are completed, press 'Submit the Application' to finalise.

Bulk Upload (Please use the CHIETA Template for Year 2023 to populate details and upload here)

**+ Choose**   **Upload**   **X Cancel**

Client Details   Application Details

Bio-Data   Training   HTFV   Skills Gap   Finance & Training   File Upload

**i** Upload all mandatory supporting documents.

Proof of Banking Details\*


Cancelled Original Cheque or Original Bank Letter not older than 6 months

**+ Choose**   **Upload**   **X Cancel**

#### 4.6 WSP/ATR Download


Annual Training Report/Workplace Skills Plan and Pivotal Training Report\*

**Download the Report for signing here**





Upload the signed document here

+ Choose

 Upload


× Cancel

#### 4.7 Verification Document Upload


Verification Document\*

**Download the Document for signing here**





**Upload Verification Document**

+ Choose

 Upload

× Cancel

## 5. SUBMITTING APPLICATION

Once you have captured all the details and you have verified that they are correct, you can do the Final submission.

**Warning:** Once the submission is finalised and submitted, you will not be able to make any changes on the application. You are therefore encouraged to check the accuracy of the application before submitting it.

To submit the application, click on "Submit Application" at the bottom of the screen. A warning message will be displayed to alert you that you will not be able to make any more changes. Accept the notification to Submit the application.

The application will then be finalised, and status of the application will change to "Submitted".

