



SERVICES SETA

GUIDELINES:

Expression of Interest (EOI)

Online Web based System



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1. Introduction

The Services SETA developed an online web based system to streamline the Discretionary Grant Application process.

The first phase of this process allows the applicant to complete an Expression of Interest (EOI).

This Guideline document will assist the user in completing the Expression of Interest (EOI) on the online web based system.

2. WEB Browser Details

Please note in order to complete the Expression of Interest (EOI) online the user needs to access the system using Internet Explorer.

You will note the notification on the system as well:

This site is best viewed in Microsoft Internet Explorer 6.0 with a Screen Resolution of 1024x 768
Note that this site is not compatible with other browsers



3. Accessing the Expression of Interest (EOI)

Please visit the Services SETA website on: www.serviceseta.org.za

A link has been placed on the website that will direct the user to the online web based system in order to complete the Expression of Interest (EOI).

A “Discretionary Grant Expression of Interest” hyperlink will be available. The system will open the Expression of Interest (EOI) form for completion once the user clicks on this link



Loton	
Username:	<input type="text"/>
Password:	<input type="password"/>
Logon to:	Discretionary Grant Application
	<input type="button" value="Enter"/> <input type="button" value="Change Password"/>
	<input type="button" value="Forgot Password"/>

Deloitte.

This site is best viewed in Microsoft Internet Explorer 6.0 with a Screen Resolution of 1024x 768
Note that this site is not compatible with other browsers

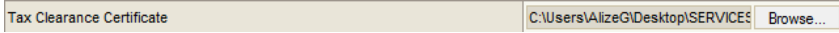
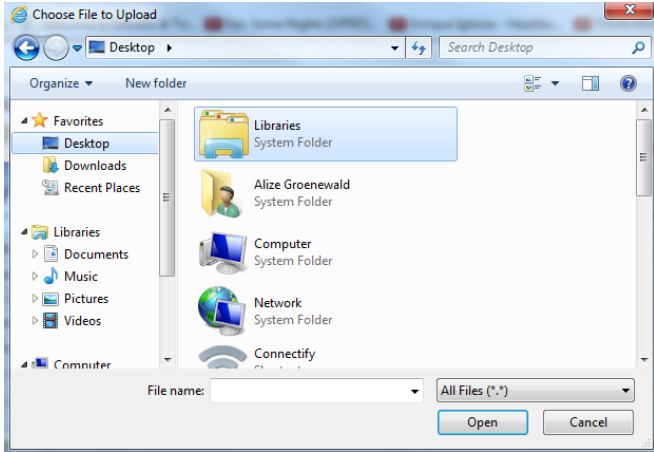
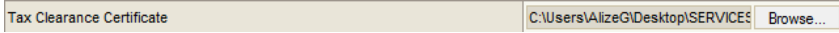
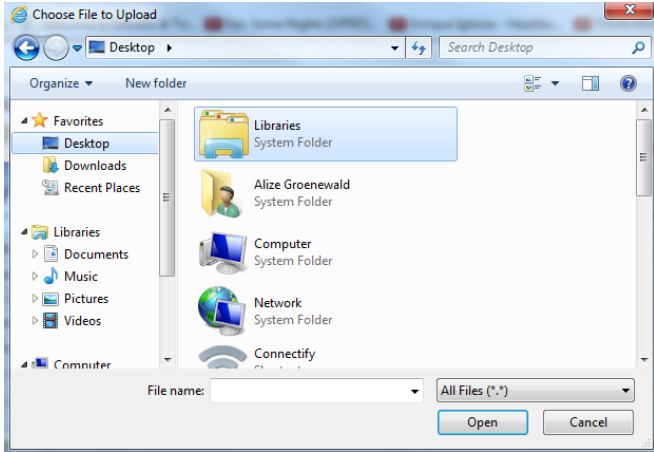
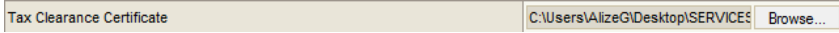
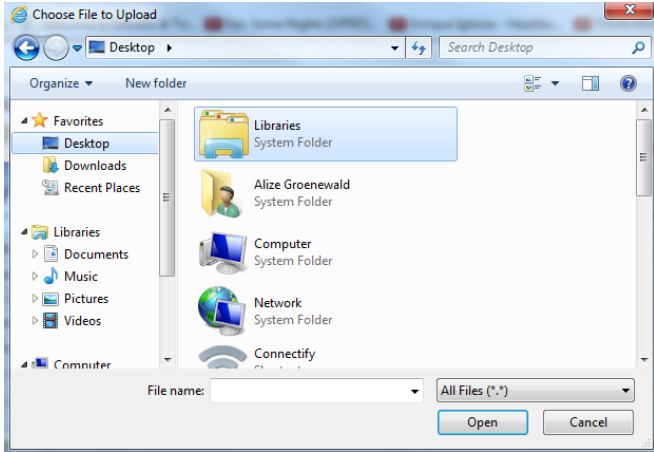




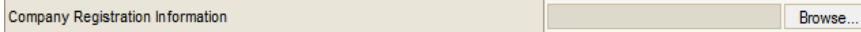
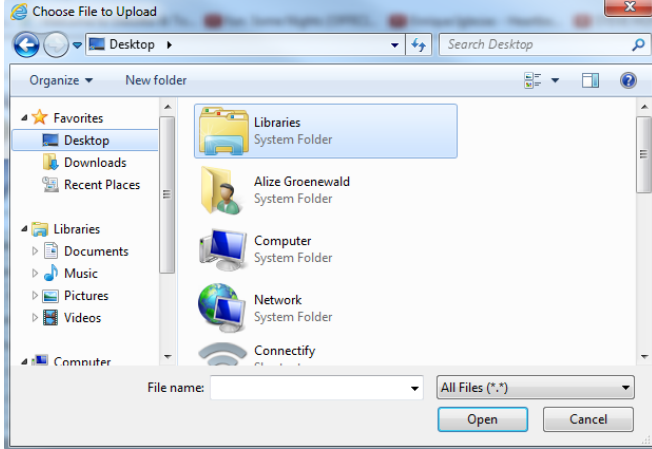
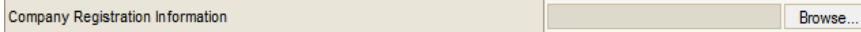
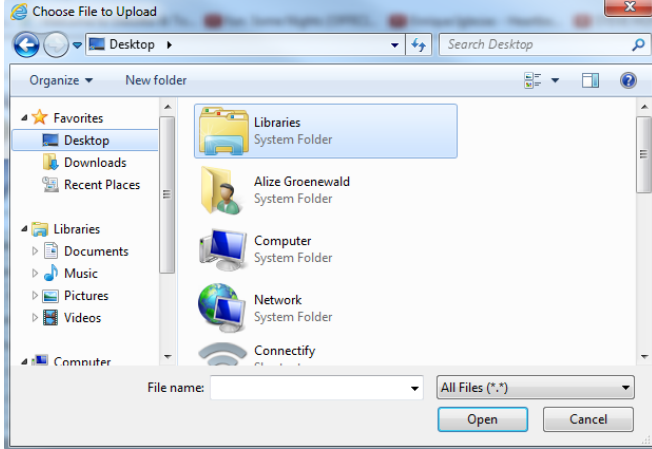
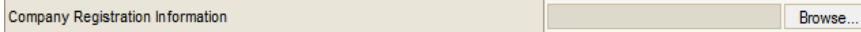
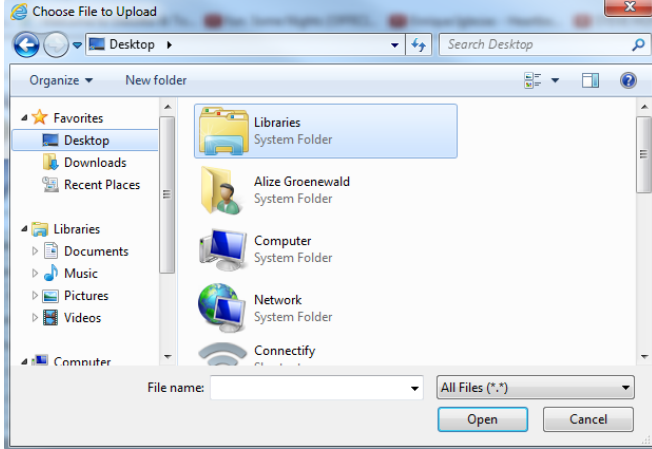


4. Completion of the Expression of Interest (EOI)

The Expression of Interest (EOI) form is on one page. This section will describe the fields that need to be completed:

#	Field	Rule	Description						
1	Tax Clearance Certificate	Compulsory	This field is an upload field. Services SETA requires the user to upload the Tax Clearance Certificate by following the next steps: <div data-bbox="1021 644 1995 1358" style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> <table border="1"> <thead> <tr> <th>Steps</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Click on the “Browse” button </td> </tr> <tr> <td>2</td> <td>Select the document to be uploaded from the popup window: </td> </tr> </tbody> </table> </div>	Steps	Description	1	Click on the “Browse” button 	2	Select the document to be uploaded from the popup window: 
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2	Select the document to be uploaded from the popup window: 								



#	Field	Rule	Description												
			<p>3 Click on the “Open” button to upload the document</p>												
2	Company Registration Information	Compulsory	<p>This field is an upload field. Services SETA requires the user to upload the Company Registration Information by following the next steps:</p> <table border="1"> <thead> <tr> <th>Steps</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Click on the “Browse” button</td> </tr> <tr> <td></td> <td>  </td> </tr> <tr> <td>2</td> <td>Select the document to be uploaded from the popup window:</td> </tr> <tr> <td></td> <td>  </td> </tr> <tr> <td>3</td> <td>Click on the “Open” button to upload the document</td> </tr> </tbody> </table>	Steps	Description	1	Click on the “Browse” button			2	Select the document to be uploaded from the popup window:			3	Click on the “Open” button to upload the document
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3	Click on the “Open” button to upload the document														
3	Legal Name	Compulsory	This field is compulsory where the system does not find the Services SETA Skills												



#	Field	Rule	Description
			Development Number in the Services SETA member database
4	Trade Name	Compulsory	This field is compulsory where the system does not find the Services SETA Skills Development Number in the Services SETA member database
5	Services SETA Skills Development Number (if applicable)	Compulsory	<p>When the user completes this field, the system verifies the Services SETA Skills Development Number against a Services SETA member database. The system will auto populate the Legal Name and the Trade Name as well as the Organisation Registration Number should the organisations' Services SETA Skills Development Number can be verified against the Services SETA member database.</p> <p>The user will need to complete the Legal Name and the Trade Name as well as the Organisation Registration Number should the system not be able to verify the Services SETA Skills Development Number in the Services SETA member database.</p>
6	Organisation Registration Number	Compulsory	This field is compulsory where the system does not find the Services SETA Skills Development Number in the Services SETA member database.
7	Are you a member of Services SETA	Compulsory	The user will need to select the Yes or No radio button.
8	Is the company a levy contributing member of the Services SETA	Compulsory	The user will need to select the Yes or No radio button.
9	What is the type of company	Compulsory	This field become a compulsory field when the user selects the No radio button in question 5 - Is the company a levy contributing member of the Services SETA
10	Which Industry are you in	Compulsory	This is a dropdown field where the user selects the industry.
11	Sub Sector	Populated Field	The system will populate this field with the Sub Sector information related to the Industry that was selected in question 7 - Which Industry are you in
12	Tax Status of Organisation	Compulsory	The user will need to select the Paying or Exempt radio button
13	Tax Number	Compulsory	The user needs to capture the Tax Number of the organisation
14	Tax Clearance Certificate Expiry Date	Compulsory	The user needs to capture the Tax Clearance Certificate Expiry Date . The system will validate whether the date is still valid. The system will allow the user to continue if the Tax Clearance Certificate is expired. The system will also notify the user using a popup message when the user saves the Expression of Interest.



#	Field	Rule	Description
			NB: It is the organisations responsibility to ensure that a valid Tax Clearance Certificate is submitted to the Services SETA before the closing of this application window.
15	Did your organisation previously submit a WSP/ATR to the Services SETA	Compulsory	The user will need to select the Yes or No radio button
16	Are you interested in submitting a WSP/ATR in 2013	Compulsory	The user will need to select the Yes or No radio button
17	Does your organisation require support in completing a WSP/ATR in 2013	Compulsory	The user will need to select the Yes or No radio button
18	Organisation size	Compulsory	The user will need to select one of the following options: <ul style="list-style-type: none"> ❖ Small (1 to 49 Employees) ❖ Medium (50 – 149 Employees) ❖ Large (150+ Employees)
19	If Small and Micro Enterprises (Less than 15 employees) do you require business mentorship programmes	Compulsory	The user will need to select the Yes or No radio button
20	Province of Organisation	Compulsory	The system populates the system with the organisations region information found on the Services SETA member database. This field is compulsory for the user to select should the system not be able to verify the organisations details from the Services SETA member database
21	Municipality of Organisation	Compulsory	The user needs to select the municipality form the dropdown list. Please note that the values in this dropdown list are the municipalities related to the region selected in question 15 - Province of Organisation
22	Contact Details	Compulsory	Below is the rules of the fields for the contact details:



#	Field	Rule	Description	
			Field	Rule
	Name	Compulsory		
	Surname	Compulsory		
	ID Number	Compulsory		The system validates that the ID Number is a valid South African ID Number . NB: The system will not the user to submit the EOI if this ID Number is not a valid South African ID Number .
	Designation	Compulsory		
	Physical Address	Compulsory		
	Postal Address	Compulsory		Please complete these fields even if it is the same as the Physical Address
	Tel Number	Not Compulsory		The user needs to type the number as is, the system will auto format the number
	Cell Number	Compulsory		The user needs to type the number as is, the system will auto format the number
	Fax Number	Not Compulsory		The user needs to type the number as is, the system will auto format the number
	Email	Compulsory		NB: The system will be using this e-mail address to send out notifications. If this e-mail is wrongly captured, not notifications will be sent to the user.
	Confirm Email address	Compulsory		This is to assist the user in ensuring that the email details captured is correct. The system will validate that this e-mail address is the same as the address entered in the Email address above.



#	Field	Rule	Description																																				
23	Alternate Contact Person's Details	Compulsory	<p>Below is the rules of the fields for the contact details:</p> <table border="1"> <thead> <tr> <th>Field</th> <th>Rule</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>Name</td> <td>Compulsory</td> <td></td> </tr> <tr> <td>Surname</td> <td>Compulsory</td> <td></td> </tr> <tr> <td>ID Number</td> <td>Compulsory</td> <td>The system validates that the ID Number is a valid South African ID Number. NB: The system will not the user to submit the EOI if this ID Number is not a valid South African ID Number.</td> </tr> <tr> <td>Designation</td> <td>Compulsory</td> <td></td> </tr> <tr> <td>Physical Address</td> <td>Compulsory</td> <td></td> </tr> <tr> <td>Postal Address</td> <td>Compulsory</td> <td>Please complete these fields even if it is the same as the Physical Address</td> </tr> <tr> <td>Tel Number</td> <td>Not Compulsory</td> <td>The user needs to type the number as is, the system will auto format the number</td> </tr> <tr> <td>Cell Number</td> <td>Compulsory</td> <td>The user needs to type the number as is, the system will auto format the number</td> </tr> <tr> <td>Fax Number</td> <td>Not Compulsory</td> <td>The user needs to type the number as is, the system will auto format the number</td> </tr> <tr> <td>Email</td> <td>Compulsory</td> <td>NB: The system will be using this e-mail address to send out notifications. If this e-mail is wrongly captured, not notifications will be sent to the user.</td> </tr> <tr> <td>Confirm Email</td> <td>Compulsory</td> <td>This is to assist the user in ensuring that</td> </tr> </tbody> </table>	Field	Rule	Comment	Name	Compulsory		Surname	Compulsory		ID Number	Compulsory	The system validates that the ID Number is a valid South African ID Number . NB: The system will not the user to submit the EOI if this ID Number is not a valid South African ID Number .	Designation	Compulsory		Physical Address	Compulsory		Postal Address	Compulsory	Please complete these fields even if it is the same as the Physical Address	Tel Number	Not Compulsory	The user needs to type the number as is, the system will auto format the number	Cell Number	Compulsory	The user needs to type the number as is, the system will auto format the number	Fax Number	Not Compulsory	The user needs to type the number as is, the system will auto format the number	Email	Compulsory	NB: The system will be using this e-mail address to send out notifications. If this e-mail is wrongly captured, not notifications will be sent to the user.	Confirm Email	Compulsory	This is to assist the user in ensuring that
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#	Field	Rule	Description
			<p>address the email details captured is correct. The system will validate that this e-mail address is the same as the address entered in the Email address above.</p>
24	Select the Interventions you interest in (more than one answer allowed)	Compulsory	<p>The system allows the user to select more than one intervention.</p> <p>NB: The system will only make the interventions selected here available in the next phase for the online application phase.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <input type="checkbox"/> Services SETA Learnerships - including FET's <input type="checkbox"/> Non Services SETA Learnerships <input type="checkbox"/> Recognition of Prior Learning <input type="checkbox"/> Skills Programmes <input type="checkbox"/> Internships <input type="checkbox"/> Bursaries (Higher Education and Training) <input type="checkbox"/> Adult Education and Training </div>
25	If Services SETA Learnerships state which learnership and number of learners	Not Compulsory	Note that this fields has been marked as Not Compulsory, HOWEVER , this field will become a compulsory field where the user selected the intervention – “Services SETA Learnerships – including FET’s”
26	If Non Services SETA Learnerships	Not Compulsory	Note that this fields has been marked as Not Compulsory, HOWEVER , this field will become a compulsory field where the user selected the intervention – “Non Services SETA Learnerships”
27	If Recognition of Prior Learning	Not Compulsory	Note that this fields has been marked as Not Compulsory, HOWEVER , this field will



#	Field	Rule	Description
			become a compulsory field where the user selected the intervention – “Recognition of Prior Learning”
28	If Skills Programmes (unit standards)	Not Compulsory	Note that this fields has been marked as Not Compulsory, HOWEVER , this field will become a compulsory fields where the user selected the intervention – “Skills Programmes”
29	If Services SETA Internship	Not Compulsory	Note that this fields has been marked as Not Compulsory, HOWEVER , this field will become a compulsory fields where the user selected the intervention – “Internships”
30	If Bursaries (Higher Education and Training)	Not Compulsory	Note that this fields has been marked as Not Compulsory, HOWEVER , this field will become a compulsory field where the user selected the intervention – “Bursaries (Higher Education and Training)”
31	If Adult Education and Training (Numeracy and Literacy)	Not Compulsory	Note that this fields has been marked as Not Compulsory, HOWEVER , this field will become a compulsory field where the user selected the intervention – “Adult Education and Training”
32	How many learners can the workplace accommodate if unemployed?	Compulsory	If there is no unemployed learners the user needs to capture a zero “0” in this field
33	Do you have internal Mentors in place?	Compulsory	The user will need to select the Yes or No radio button
34	How many additional Internal Workplace Mentors do you require?	Compulsory	If there is no additional Internal Workplace Mentors are required, the user needs to capture a zero “0” in this field
35	Is training required for these Internal Workplace Mentors	Compulsory	The user will need to select the Yes or No radio button
36	Do you have SDFs in place?	Compulsory	The user will need to select the Yes or No radio button
37	How many additional SDFs do you require?	Compulsory	If there is no additional SDFs are required, the user needs to capture a zero “0” in this field
38	Is this training required for these SDFs?	Compulsory	The user will need to select the Yes or No radio button



#	Field	Rule	Description
39	Are you an authorised person to act on behalf of the employer?	Compulsory	The user will need to select the Yes or No radio button. NB: The system will validate this field. The user will not receive an e-mail with user details for the application phase should the answer selected for this question is No
40	The employer must be willing to cooperate with, and facilitate a workplace readiness evaluation visit by the Services SETA to determine suitability and capacity to implement learning programmes. Complete readiness will not be a requirement for inclusion. The Services SETA will assist employers to put in place what is needed to implement a successful programme for learners,	Compulsory	The user will need to select the Agree or Disagree radio button. NB: The system will validate this field. The user will not receive an e-mail with user details for the application phase should the answer selected for this question is Disagree
41	SAVE Button	Compulsory	In order to submit the completed Expression of Interest the user needs to click on the “Save” button. NB: The system only saves and submit the information when the user clicks the “Save” button. Data will be lost if this button is not clicked.



5. System Notifications


Please be aware of the system notifications in the form of pop-up messages and system writings on the fields.

For the popup messages to work efficiently the user needs to ensure that the pop-up blockers on Internet Explorer are disabled.

Follow the next steps to disable the pop-up blockers:

Step	Description	Screenshot
1	Open Internet Explorer	
2	Click on the Tools Menu	
3	Hover over the "Pop-up Blocker" option	
4	Select "Turn off Pop-up Blocker" from the sub menu	
5	Click 'Yes' on the popup message	

The System will direct the user to the next page when the user saves the Expression of Interest (EOI) has been successfully. Example of this page:



Discretionary Grant : Expression of Interest - your application has been received in good order ...

Confirmation of Expression of Interest Details:

Name of Organisation:	Test Company
Services SETA Sals Development Number (if applicable):	L000000000
Organisation Registration Number:	2001/55/201235
Tax Number:	123456789
Contact Name:	Alize
Contact Surname:	Groenewald
Contact Designation:	Manager
Contact Email address:	agroenewald@dtss.co.za
SETA:	SERVICESSETA
Reference No:	EOI-01/2012/00003



The system will also send an e-mail with the EOI Reference Number to the e-mail address added in the contact details to the user for record keeping purposes:

SETA@SMS.co.za

Sent: Fri 07/12/2012 04:57 PM

To: Alize Groenewald; Alize Groenewald

Message ATT142334.dat (276 B)

We acknowledge receipt of your Expression of Interest for Test Company - L000000000

Your Reference No is: EOI-01/2012/00003

6. Notes