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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  | | --- | --- | | **Organisation:** | FP&M SETA | | **Project name:** | DG system Stakeholder Manual | | **Date:** | 13 February 2019 | |  |  | |

Table of Contents

[1 Important information to Note before registering as Stakeholder: 2](#_Toc30515838)

[2 SDF Profiles on the system 2](#_Toc30515839)

[2.1 Document required 2](#_Toc30515840)

[3 HOW TO REGISTER AS NEW STAKEHOLDER 2](#_Toc30515841)

[4 ACCESSING ORGANISATION INFORMATION AND CREATING FORMS 4](#_Toc30515842)

[5 UPLOADING SUPPORTING DOCUMENT 5](#_Toc30515843)

[6 CAPTURING INFORMATION ON PIVOTAL FORMS 6](#_Toc30515844)

[7 CAPTURING INFORMATION ON NON PIVOTAL FORMS 7](#_Toc30515845)

[8 EDITING INFORMATION IN THE FORMS 8](#_Toc30515846)

[9 SUBMITTING FORMS 9](#_Toc30515847)

# Important information to Note before registering as Stakeholder:

1. ID / alternative ID number are key during the registration process
2. Scanned appointment letter from the Organization(s) to be on hand when accessing the system to register.
3. Stakeholders to know the SDL numbers of their organization’s as they will be required to link and search using the SDL number on the system
4. None levy paying organizations will have N number allocated to them by FPMSETA

# SDF Profiles on the system

* Stakeholder Capturer which includes all approved stakeholders including SSAs)
* Stakeholder (view only)

## Document required

•Valid Tax Clearance Certificate/Tax Exemption document

•CIPRO/Government Registration

•BEE Certificate (if applicable) Bee Level must be selected before you Submit

•Bargaining Council certificate/exemption letter

•Proof of accreditation

•Letter/agreement appointing external training provider

•Occupation Health and Safety Certificate (If applicable)

# HOW TO REGISTER AS NEW STAKEHOLDER

| Steps |  | Action | Screenshot |
| --- | --- | --- | --- |
| 1 |  | Click on ***Register*** to register as Stakeholder in the system |  |
| 2 |  | Click on ***Register*** from the ***Registration Menu*** |  |
| 3 |  | Capture your personal details on the “Applicant Details” page. |  |
| 4 |  | Click on the ***Save and Proceed button*** to move to the next step. |  |
| 5 |  | Click the **magnifying glass** to search for organisation SDL number |  |

# ACCESSING ORGANISATION INFORMATION AND CREATING FORMS

| Steps | Action | Screenshot |
| --- | --- | --- |
| 1 | **Login** into the system |  |
| 2 | The Stakeholder **Dashboard** will open  Click on **organisation**    Click on **organisation** and search for SDL number  Organisation will open at the bottom for **Stakeholde**r to open  Click on the Magnifying glass to open |  |
| 3 | **Stakeholder** must confirm organisation details  click the **edit** button and then confirm on the tick box  Then click on **Save** |  |

# UPLOADING SUPPORTING DOCUMENT

The section below outlines the process for uploading supporting document

| Steps | Action | Screenshot |
| --- | --- | --- |
| 1 | Click on document type then click on choose file  Capture details and save |  |
| 2 | File uploaded will show as below |  |

# CAPTURING INFORMATION ON PIVOTAL FORMS

| Steps | Action | Screenshot |
| --- | --- | --- |
| 1 | Click on Grant Type details then click on select button to open  **Captureinformation and Save**  Information captured will show as below |  |

# CAPTURING INFORMATION ON NON PIVOTAL FORMS

| Steps | Action | Screenshot |
| --- | --- | --- |
| 1 | Click **on Grant Type details** then click on **select button** to open  **Captureinformation and Click on add to Save**  Information captured will show as below  Click on **Project budget summary**  Capture information and Save |  |

# EDITING INFORMATION IN THE FORMS

| Steps | Action | Screenshot |
| --- | --- | --- |
| 1 | Click on Grant Type details then click on select button to open  Click on the information you want to **Edit and** click on button to edit  Info will open for Stakeholder to **Edit** and then click on update to update |  |

# SUBMITTING FORMS

**Welcome to the 2020/2021 funding window.**  
  
Before you proceed, please ensure that you have a minimum of the following documents for upload purposes in electronic format on hand to be able to proceed with the application:

 Valid Tax Clearance Certificate/Tax Exemption document

 CIPRO/Government Registration

 BEE Certificate

 Bargaining Council certificate/exemption letter

 Proof of accreditation

 Letter/agreement appointing external training provider

 Occupation Health and Safety Certificate (If applicable)

| Steps | Action | Screenshot |
| --- | --- | --- |
| 1 | Click **forms** you want to Submit  Then click on **View** to **open**  Click on ***Submit DG application***  Click **ok** to submit  **DG Status** will show as Submitted |  |