



SDF USER MANUAL

WSP ATR 2026_2027



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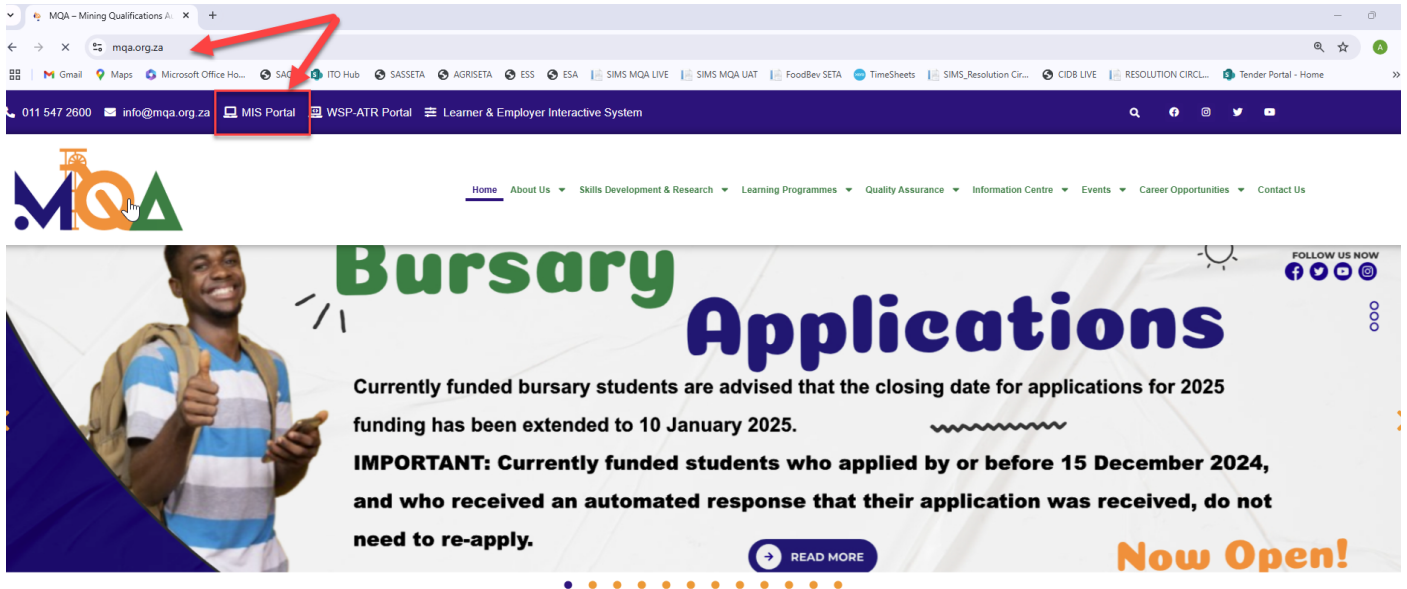
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Login to SIMS

Follow the next steps to access **SIMS**.

- 1 The system is accessible through a link that are placed on the MQA website. Navigate to www.mqa.org.za.



Click on WSP-ATR Portal.

- 2 The hyperlink will navigate to the **SIMS** landing page.



SDF Registration



SDF REGISTRATION

The following Steps is required for you to access SIMS.

Step 1

Follow the next steps to access **SIMS**.

Step 2

On the Landing Page Click on SDF Registration



MINING QUALIFICATIONS AUTHORITY

Login

Enter Username

Password

Login

[Forgot password?](#)

[SDF Registration](#)

[SDF Appointment Letter](#)

The following Steps is required for you to register as an SDF on SIMS

Step 3 – Complete Person Details

SDF Details

ORGANISATION DETAILS

First Name * Middle Name Surname *

PERSON DETAILS CONTACT DETAILS ADDRESS DETAILS EDUCATION & EXPERIENCE

ID Document Upload

UPLOAD FILE

Title * ID No * Initials *

Date of Birth * Gender * Equity *

Disability * Home Language * Citizen Residential Status *

Alternate ID Type * Nationality * Socio Economic Status *

If you are in a new South African ID card, you can use the following steps:

Note: If you do not have a new South African ID card the information should be captured manually

Click on Upload File to upload the New South African ID card.

SDF Details

ORGANISATION DETAILS

First Name * Middle Name Surname *

PERSON DETAILS CONTACT DETAILS ADDRESS DETAILS EDUCATION & EXPERIENCE

ID Document Upload

UPLOAD FILE

Title * ID No * Initials *

Date of Birth * Gender * Equity *

Disability * Home Language * Citizen Residential Status *

Alternate ID Type * Nationality * Socio Economic Status *

Navigate to where the ID document is stored on your laptop/device.

Once the file is uploaded, Click on Extract File.

First Name *

PERSON DETAILS CONTACT DETAILS ADDRESS DETAILS EDUCATION & EXPERIENCE

ID Document Upload

UPLOAD FILE EXTRACT FILE



Once the Extract File is selected the system will display the following three blue dots indicating that the process on reading information from the ID card is in progress.

ID Document Upload

UPLOAD FILE EXTRACT FILE



Title * ID No * Initials *

Date of Birth * Gender * Equity *

Disability * Home Language * Citizen Residential Status *

Alternate ID Type * Nationality * Socio Economic Status *

Three blue dots indicating processing progress.

The following information will auto populate from the ID card uploaded:

First Name * CHARLIZE Middle Name Surname * THERON

PERSON DETAILS CONTACT DETAILS ADDRESS DETAILS EDUCATION & EXPERIENCE

ID Document Upload

UPLOAD FILE EXTRACT FILE



Title * ID No * 8303100111087 Initials *

Date of Birth * 10/03/1983 Gender * Female Equity *

Disability * Home Language * Citizen Residential Status * South Africa

Alternate ID Type * Nationality * South Africa Socio Economic Status *

- First Name
- Middle Name – as per this example the person did not have a Middle Name
- Surname
- ID No

- Date of Birth
- Gender
- Citizen Residential Status
- Nationality

Please complete the remainder of the fields:

Title *	ID No *	Initials *
Date of Birth *	Gender *	Equity *
10/03/1983	Female	
Disability *	Home Language *	Citizen Residential Status *
		South Africa
Alternate ID Type *	Nationality *	Socio Economic Status *
	South Africa	

Then click on the Save Button

SDF Details

ORGANISATION DETAILS

First Name *
CHARLIZE

PERSON DETAILS CONTACT DETAILS ADDRESS DETAILS EDUCATION & EXPERIENCE

ID Document Upload

UPLOAD FILE EXTRACT FILE

All Fields marked with an * Asterisks are compulsory to complete and if not captured and save is selected the fields will display in red, indicating that the fields are compulsory.

Title *	ID No *	Initials *
Date of Birth *	Gender *	Equity *
10/03/1983	Female	
Disability *	Home Language *	Citizen Residential Status *
		South Africa
Alternate ID Type *	Nationality *	Socio Economic Status *
	South Africa	

Step 4 – Complete Contact Details

SDF Details

ORGANISATION DETAILS

First Name * Middle Name Surname *

PERSON DETAILS CONTACT DETAILS ADDRESS DETAILS EDUCATION & EXPERIENCE

ID Document Upload

UPLOAD FILE

Title *	ID No *	Initials *
Date of Birth *	Gender *	Equity *
Disability *	Home Language *	Citizen Residential Status *
Alternate ID Type *	Nationality *	Socio Economic Status *

The following fields are compulsory to complete:

- Cell Phone Number
- E Mail

First Name * CHARLIZE Middle Name Surname * THERON

PERSON DETAILS CONTACT DETAILS ADDRESS DETAILS EDUCATION & EXPERIENCE

Telephone Number Cell Phone Number *
* Required

Fax Number E Mail *
* Required

Note: Please ensure that when you are capturing your email address:

1. The E-mail address is valid (spelling)
2. The E-mail address is most recent.

All system related correspondence will be sent to the email address captured therefore it is important to use the most recent and valid email address.

Click on the Save Button.

SDF Details

ORGANISATION DETAILS

First Name * CHARLIZE

PERSON DETAILS CONTACT DETAILS

Step 5 – Complete Address Details

SDF Details

ORGANISATION DETAILS

First Name * Middle Name Surname *

PERSON DETAILS CONTACT DETAILS ADDRESS DETAILS EDUCATION & EXPERIENCE

ID Document Upload
UPLOAD FILE

Title * ID No * Initials *

Date of Birth * Gender * Equity *

Disability * Home Language * Citizen Residential Status *

Alternate ID Type * Nationality * Socio Economic Status *

In the Address field, please type in your full Physical address.

First Name * CHARLIZE Middle Name Surname * THERON

PERSON DETAILS CONTACT DETAILS ADDRESS DETAILS EDUCATION & EXPERIENCE

☐ Use Physical Address for Postal Address?

Address GPS Coordinates

Physical Address 1 * Postal Address Line 1 *
* Required * Required

Physical Address 2 * Postal Address Line 2 *
* Required * Required

Physical Address 3 * Postal Address Line 3
* Required

Physical Code * Postal Code *
The code must be 4 or 5 digits long The code must be 4 or 5 digits long

Province Province

Municipality Municipality

Urban Rural * Urban Rural *

If the address is valid Google will read the address and auto populate the following fields:

☐ Use Physical Address for Postal Address?

Address 7 Anerley Road, Parktown, Johannesburg, South Africa	GPS Coordinates -26,10,02.532 28,02,53.700
Physical Address 1 * 7 Anerley Road	Postal Address Line 1 *
Physical Address 2 * Parktown	Postal Address Line 2 *
Physical Address 3 * Johannesburg	Postal Address Line 3
Physical Code * 2193	Postal Code * The code must be 4 or 5 digits long
Province Gauteng	Province
Municipality Johannesburg Metro	Municipality
Urban Rural * Urban	Urban Rural *

- Physical address 1
- Physical Address 2
- Physical Address 3
- Physical Code
- Province
- Municipality
- Urban/Rural
- GPS Coordinates

Note: If the address is not recognized the fields should be captured manually.

Both Physical Address and Postal Address is compulsory to complete.

If the Physical Address and Postal Address are the same, please use the below tick box.



☒ Use Physical Address for Postal Address?

Once selected the Postal address will auto populate the postal address details fields.

☒ Use Physical Address for Postal Address?

Address 7 Anerley Road, Parktown, Johannesburg, South Africa	GPS Coordinates -26,10,02.532 28,02,53.700
Physical Address 1 * 7 Anerley Road	Postal Address Line 1 * 7 Anerley Road
Physical Address 2 * Parktown	Postal Address Line 2 * Parktown
Physical Address 3 * Johannesburg	Postal Address Line 3 Johannesburg
Physical Code * 2193	Postal Code * 2193
Province Gauteng	Province Gauteng
Municipality Johannesburg Metro	Municipality Johannesburg Metro
Urban Rural * Urban	Urban Rural * Urban

Click on the Save Button if all required fields are captured.

SDF Details

ORGANISATION DETAILS

First Name *

CHARLIZE

PERSON DETAILS

CONTACT DETAILS

ADDRESS DETAILS

Step 6 – Complete Education and Experience

SDF Details

ORGANISATION DETAILS

First Name *

Middle Name

Surname *

PERSON DETAILS

CONTACT DETAILS

ADDRESS DETAILS

EDUCATION & EXPERIENCE

ID Document Upload

UPLOAD FILE

Title *

ID No *

Initials *

Date of Birth *

Gender *

Equity *

Disability *

Home Language *

Citizen Residential Status *

Alternate ID Type *

Nationality *

Socio Economic Status *

The following fields on this section are compulsory to complete and marked as an asterisk.

PERSON DETAILS CONTACT DETAILS ADDRESS DETAILS **EDUCATION & EXPERIENCE**

Highest Education *

Highest Education Description

* Required

Name Of Accredited Training Provider

Experience *

* Required

Current Occupation *

Year In Occupation *

* Required

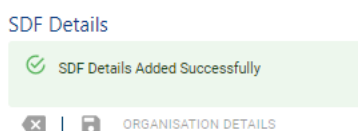
General Comments *

* Required

Once all the compulsory fields are captured, Click on Save

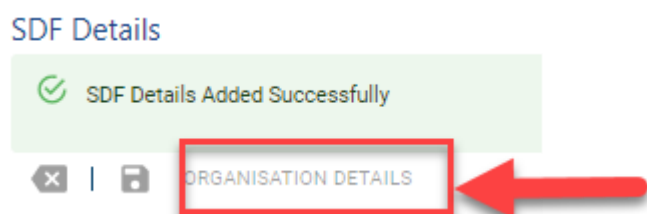


If all 6 Steps have been completed and all required fields captured the following will display:



Step 7 – Link Organisation

Click on the Organisation details.



The following screen will display:

SDF Details > Organisations Details > CHARLIZE THERON - 8303100111087

| + FRESH

Organisation Name	SDF Number	Status	Document	Banking Detail Document
-------------------	------------	--------	----------	-------------------------

Please click on the + sign to Link the SDF to an Organisation.

SDF Details > Organisations Details > CHARLIZE THERON - 8303100111087

| + FRESH

Organisation Name	SDF Number	Status	Document	Banking Detail Document
-------------------	------------	--------	----------	-------------------------

The following screen will display.

Link Organisation

Organisation Details

Organisation * 

☐ Consultant acting for Employer?

Will you perform your SDF functions in respect of * 

Please indicate method of appointment to SDF position * 

Other method of appointment

☐ Are you replacing the previous primary SDF of this Company?

☐ Are you registering as secondary SDF for this Company?

UPLOAD LETTER OF APPOINTMENT

Banking Details

UPLOAD BANK DETAILS

Banking details uploaded must be signed off by the Organisation CFO as true and correct.

Bank Name * 

Branch Name *

Branch Code *

Account Holder *

Account Type * 

Account Number *

The Administrative Details Given Above Are Correct * 

The Banking Details Given Above Are Correct * 

The Banking Details Given Above Have Changed * 

SAVE CANCEL

On the first field – Organisation Details – click on the magnifying glass.

Organisation Details

Organisation * 

Then Type in the SDL number, followed by the Search button.

Skills Organisations

SDL Number 

Legal Name	Trade Name	SDL Number
------------	------------	------------

If the L number is found, click anywhere on the field to select the SDL number.

Skills Organisations

SDL Number
L00080000

Legal Name Trade Name SDL Number

Test Organisation	Test Organisation	L00080000
-------------------	-------------------	-----------

Once selected the background colour will change, proceed and click on the OK button.

Skills Organisations

SDL Number
L00080000

Legal Name Trade Name SDL Number

Test Organisation	Test Organisation	L00080000
-------------------	-------------------	-----------

Rows per page: 10 1-1 of 1

CANCEL OK

If the SDL number is not found, the following message will display and MQA Skills Development Unit should be contacted.

Skills Organisations

The SDL you are trying to submit for cannot be found. Please contact the Skills Development unit.

SDL Number
L90003456

Legal Name Trade Name SDL Number

Proceed to complete the remainder of the fields on the form, once completed click on the Save button.

Link Organisation

Organisation Details

Organisation *
Test Organisation

☐ Consultant acting for Employer?

Will you perform your SDF functions in respect of *

Please indicate method of appointment to SDF position *

Other method of appointment

☐ Are you replacing the previous primary SDF of this Company?

☐ Are you registering as secondary SDF for this Company?

UPLOAD LETTER OF APPOINTMENT

Banking Details

UPLOAD BANK DETAILS

Banking details uploaded must be signed off by the Organisation CFO as true and correct.

Bank Name *

Branch Name *

Branch Code *

Account Holder *

Account Type *

Account Number *

The Administrative Details Given Above Are Correct *

The Banking Details Given Above Are Correct *

The Banking Details Given Above Have Changed *

SAVE CANCEL

Note: The Letter of Appointment and Bank Details are not Compulsory to upload on this section and can be uploaded at a later stage.

UPLOAD LETTER OF APPOINTMENT

Banking Details

UPLOAD BANK DETAILS

Banking details uploaded must be signed off by the Organisation CFO as true and correct.

If another Primary SDF is already linked to this Company, the following message will display and MQA Skills Development Unit should be contacted.

Link Organisation

ⓘ Another Primary SDF already registered with this SDL number, please contact MQA for further assistance.

☒ Consultant acting for Employer?

Will you perform your SDF functions in respect of *

Single establishment

Please indicate method of appointment to SDF position *

Appointed by employer

Other method of appointment

The same will apply if the application is for a Secondary SDF.

Note: MQA rule is that only One Primary SDF and only One Secondary SDF can be linked to an Organisation.

If all compulsory fields are captured and the Save button is selected the following screen will display indicating that the system is processing and saving the information.

Link Organisation

ⓘ

Another Primary SDF already registered with this SDL number, please contact MQA for further assistance.

Single establishment

Please indicate method of appointment to SDF position *

Appointed by employer

Other method of appointment

☒ Are you replacing the previous Primary SDF of this Company?

☐ Are you registering as secondary SDF for this Company?

UPLOAD LETTER OF APPOINTMENT

Banking Details

UPLOAD BANK DETAILS

Banking details uploaded must be signed off by the Organisation CFO as true and correct.

Bank Name *

ABSA

Branch Name *

Test3642

Branch Code *

5683e

Account Holder *

Test

Account Type *

Current

Account Number *

4575368

The Administrative Details Given Above Are Correct *

Yes

The Banking Details Given Above Are Correct *

Yes

The Banking Details Given Above Have Changed *

Yes

Newly Registered Company? *

No

Registration Date

SAVE

CANCEL

The following field will display once the Organisation has been linked successfully.

SDF Details > Organisations Details > CHARLIZE THERON - 8303100111087

Organisation Name	SDL Number	Status	Document	Banking Detail Document
testg22	99999	Pending		

The Status of the application will default to Pending.

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Step 8 – Finalise Application

Important to Finalise the Application by clicking on the Finish Button.

SDF Details > Organisations Details > CHARLIZE THERON - 8303100111087

| + FINISH 

Organisation Name	SDL Number
testrg22	99999

Once Finalised the below message will display:

Finalise SDF Registration

Formal evaluation will be done by MQA for this SDF application and the outcome thereof will be communicated via e-mail.

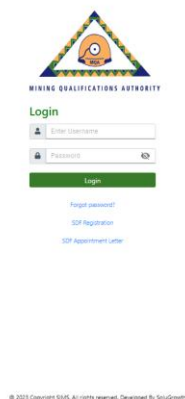
Please access the system by using the forgot password functionality and resetting your password. The username will be your ID number.

Should you have any queries with the process please consult the training manual and guidelines.

OK

Please read the message and click on OK.

The screen will refresh and take you back to the landing page.



Please navigate to your Email account as the following email will be received:

Dear CHARLIZE THERON

A formal evaluation will be done by MQA for this SDF application and the outcome thereof will be communicated via e-mail. I

Please access the system by using the forgot password functionality and resetting your password. The username will be your ID number.

Should you have any queries with the process please consult the training manual and guidelines

**Yours Sincerely
MQA Skills Division**

EXISTING SDF PROCESS

Step 1: Login to SIMS with your existing credentials.



MINING QUALIFICATIONS AUTHORITY

Login

Login

[Forgot password?](#)

Step 2: Select your primary SDF role and click next.

Select a Role

☒ Primary SDF

BACK

NEXT

The below dashboard will display with the organisation(s) linked to your SDF profile.

Step 3: Select the organisation you want to submit for and click on view organisation to start the submission process.

Mining Qualifications Authority (MQA)

Lethabo Poopedi - Primary SDF

SDF Dashboard - Lethabo Poopedi

EDIT SDF DETAILS

LINK/REMOVE ORGANISATIONS

Organisation Name	SDL Number	SDF Status
testing	L12345678	Approved
Testing Org	N000000000	Pending

Link/Delink Organisations

Step 1: Select the LINK/REMOVE ORGANISATION button.

SDF Dashboard - Lethabo Poopedi - 9709040176080

EDIT SDF DETAILS LINK/REMOVE ORGANISATIONS

Organisation Name	SDL Number	SDF Status
testing	L12345678	Approved
Testing Org	N000000000	Pending

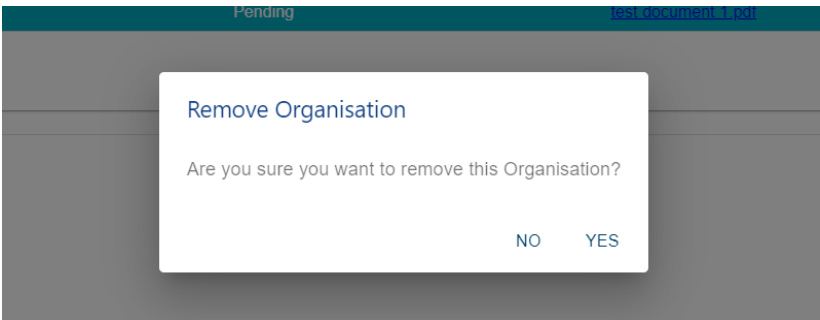
Step 2: To remove organisation: Select the organisation records and click on the remove button.

SDF Details > Organisations Details > Lethabo Poopedi -

X +

Organisation Name	SDL Number	Status	Document	Banking Detail Document
testing	L12345678	Approved	test document 1.pdf	test document 2.pdf
Testing Org	N000000000	Pending	test document 1.pdf	test document 4.pdf

Step 2.1: Confirm if you want to remove organisation by clicking Yes. Then the organisation will be removed from your profile.



Step 3: To link new organisation: click on the add request button to your profile.

SDF Details > Organisations Details > Lethabo Poopedi - 9709040176080

X +

Organisation Name	SDL Number	Status	Document
testing	L12345678	Approved	test document 1.pdf
Testing Org	N000000000	Pending	test document 1.pdf

Step 3.1: The below page will display. Complete the organisation details.

Link Organisation

Organisation Details

Organisation *

☐ Consultant acting for Employer?

Will you perform your SDF functions in respect of *

Please indicate method of appointment to SDF position *

Other method of appointment

☐ Are you replacing the previous primary SDF of this Company?

☐ Are you registering as secondary SDF for this Company?

UPLOAD LETTER OF APPOINTMENT

Banking Details

UPLOAD BANK DETAILS

Banking details uploaded must be signed off by the Organisation CFO as true and correct.

SAVE CANCEL

Step 4: Once you have completed the organisation details click save.

Link Organisation

Banking details uploaded must be signed off by the Organisation CFO as true and correct.

Bank Name *
Bank of Athens

Branch Name *
abc

Branch Code *
231234

Account Holder *
Test organization

Account Type *
Transmission

Account Number *
98765432

The Administrative Details Given Above Are Correct *
Yes

The Banking Details Given Above Are Correct *
Yes

The Banking Details Given Above Have Changed *
No

Newly Registered Company? *
No

Registration Date
19/01/2024

SAVE CANCEL

If another Primary SDF is already linked to this Company, the following message will display and MQA Skills Development Unit should be contacted.

Link Organisation

Another Primary SDF already registered with this SDL number, please contact MQA for further assistance.

☒ Consultant acting for Employer?

Will you perform your SDF functions in respect of *
Single establishment

Please indicate method of appointment to SDF position *
Appointed by employer

Other method of appointment

The same will apply if the application is for a Secondary SDF.

Note: MQA rule is that only One Primary SDF and only One Secondary SDF can be linked to an Organisation.

The following fields will display once the Organisation has been linked successfully.

Organisation Name	SDL Number	Status	Document	Banking Detail Document
testing	L12345678	Approved	test document 1.pdf	test document 2.pdf
Testing Org	N000000000	Pending	test document 1.pdf	test document 4.pdf

Rows per page: 10 1-2 of 2

The Status of the application will default to Pending. Awaiting approval from MQA.

UPLOAD REQUIRED DOCUMENTS

Step 1: Select the organisation you are linked to on your SDF dashboard and click on the view organisation button.

SDF Dashboard		
EDIT SDF DETAILS LINK/REMOVE ORGANISATIONS		
Organisation Name	SDL Number	SDF Status
testing	L12345678	Approved

Step 2: Navigate to CRM tab.

Organisation > testing - L12345678

CONTACT BANK DETAILS LINK ORGANISATIONS TRAINING COMMITTEE / UNION CFO DETAILS WSP & ATR FORMS WSP/ATR DOCUMENT UPLOADS GRANTS & LEVIES CRM

Trade Name * Legal Name * SDL Number *

Test organisation testing L12345678

GENERAL DETAILS CONTACT DETAILS ADDRESS DETAILS

Step 3: Click on the communication type dropdown.

Organisation > CRM > testing - L12345678

Communication Type

Comments

Step 4: Select documents option.

Organisation > CRM > testing - L12345678

Comments Documents Email

Step 5: Click on Upload Document.

Organisation > CRM > testing - L12345678

Communication Type
Documents

Documents



Upload Document	Upload Date
Uploaded by	

Step 6: Click on the Document Relates to dropdown and select the Signed SDF Appointment Letter to upload the current financial year signed SDF Appointment Letter.

New Document

Document Relates to *
Signed SDF Appointment Letter

Comment

UPLOAD DOCUMENT

SAVE CANCEL

Step 7: Select the UPLOAD DOCUMENT button and upload the document applicable to the signed SDF appointment letter and click save.

New Document

Document Relates to *
Signed SDF Appointment Letter

Comment

UPLOAD DOCUMENT test document 3.pdf

→ SAVE CANCEL

Step 8: The document will be saved under the documents section of the CRM tab.

Documents

Uploaded By	Upload Date	Document Relates	Comment	Document Name
Lethabo Poopedi	2024/01/22 08:35:27	Signed SDF Appointment Letter		test document 7.pdf

Step 9: To upload the second required document, click on the Document Relates to dropdown and select the Signed Bank Letter to upload the current financial year signed Bank Letter.

New Document

Document Relates to *

Signed Bank Letter

Comment

UPLOAD DOCUMENT

SAVE

CANCEL

Step 10: Select the UPLOAD DOCUMENT button and upload the document applicable to the signed bank letter and click save.

New Document

Document Relates to *

Signed Bank Letter

Comment

UPLOAD DOCUMENT

batch 13648.pdf

→

SAVE

CANCEL

Step 11: The document will be saved under the documents section of the CRM tab.

Documents

Uploaded By	Upload Date	Document Relates	Comment	Document Name
Test FAT Test FAT Surname	2023/03/13 13:02:01	Signed Bank Letter		Bank Letter.pdf

The next section will demonstrate how to use the Forgot Password Functionality.

Forgot Password

Follow the below steps.

Step 1: Click on the Forgot password link.



MINING QUALIFICATIONS AUTHORITY

Login

Login

[Forgot password?](#)

[SDF Registration](#)

Step 2: Enter your Username then click Reset Password.



MINING QUALIFICATIONS AUTHORITY

Reset Password

[Back to Login](#)

Step 3: After clicking Reset Password button, you will receive a system generated email with a new Temporary Password. Copy the temporary password from your email to a notepad.



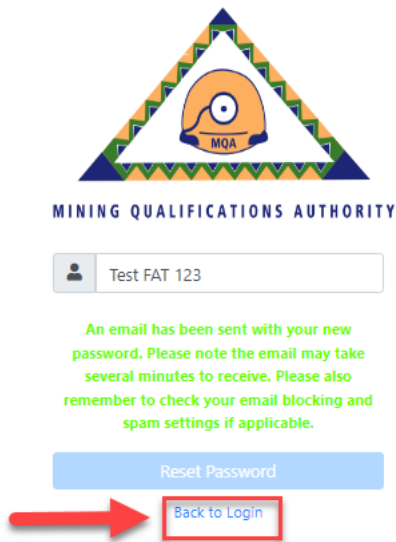
MINING QUALIFICATIONS AUTHORITY

An email has been sent with your new password. Please note the email may take several minutes to receive. Please also remember to check your email blocking and spam settings if applicable.

Reset Password

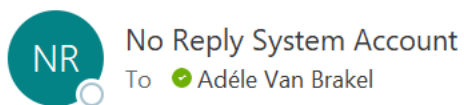
[Back to Login](#)

Step 4: After the message is displaying click on “Back to Login.”



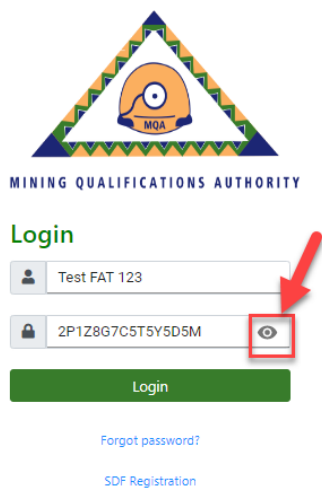
Step 5: Open your Email and copy the Temporary Password as per sample below:

SIMS Password Recovery



You currently requested for a password

New Temporary Password: 2P1Z8G7C5T5Y5D5M



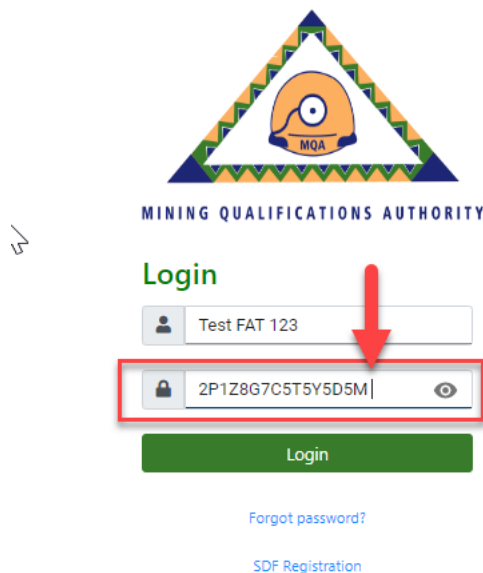
Step 6: Enter your username and paste the temporary password then click Login.

Make sure there is no space behind the last letter of the password.

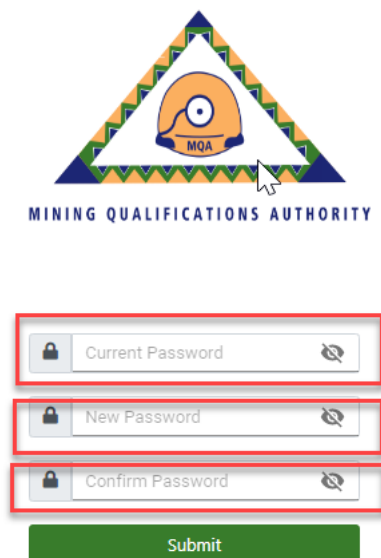
You can do this by selecting the View Button.

If there is a space, please remove the space by using the Backspace on your keyboard.

Then Click on Login.



The next screen will display.



Step 7: Enter your temporary password as 'Current Password and then type in a new password.

Make sure your new created password meets the following criteria.

!

PLEASE NOTE THAT NEW PASSWORD DOES NOT MATCH THE FOLLOWING CRITERIA:
THE LENGTH OF THE PASSWORD MUST BE AT LEAST 7 CHARACTERS LONG
THE PASSWORD MUST CONTAIN ONE CAPITAL/UPPER CASE LETTER
THE PASSWORD MUST AT LEAST CONTAIN A SPECIAL CHARACTER

X

In your New Password please also ensure that the password does not contain and part of your username.

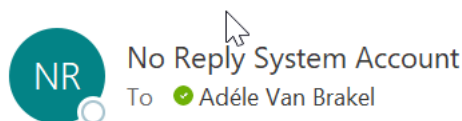
!

PLEASE NOTE THAT NEW PASSWORD DOES NOT MATCH THE FOLLOWING CRITERIA:
THE PASSWORD MUST AT LEAST CONTAIN A SPECIAL CHARACTER
PASSWORD CANNOT CONTAIN THE USER'S ACCOUNT NAME OR PART OF THE USER'S FULL NAME THAT EXCEED TWO CONSECUTIVE CHARACTERS.

X

Step 8: Select Submit then your password will be reset successfully!! A system generated email will be sent to you with your new created password.

SIMS Password Changed



Your password has been changed
New Password: 2P1Z8G7C5T5Y5D5M@

Step 7: Go back to login and use your new password to login. You will be required to change your password at the end of every month for audit purpose.

Once the Password has been updated the SDF Dashboard will display.

☰ Mining Qualifications Authority (MQA)

Adele Van Brakel - Primary SDF

SDF Dashboard - null null - null

EDIT SDF DETAILS LINK/REMOVE ORGANISATIONS

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Once you are logged in The SDF Dashboard will display with all the Organisations linked to your profile.

EDIT SDF DETAILS LINK/REMOVE ORGANISATIONS

SDF Dashboard - Test FAT Test FAT Surname - Test FAT 123

Organisation Name	SDL Number	SDF Status
testing	L12345678	Pending

Rows per page: 10 1-1 of 1

Select the company and click on the View Organisation.

↓

EDIT SDF DETAILS LINK/REMOVE ORGANISATIONS

SDF Dashboard - Test FAT Test FAT Surname - Test FAT 123

Organisation Name	SDL Number
testing	L12345678

GENERAL INFORMATION ON THE TABS

1. Organisation Details

General Details- These are compulsory, and all fields should be completed Please remember to select the Tick box at the bottom of the screen to Confirm Details.

Organisation > testing - L12345678

LINK ORGANISATIONS WSP & ATR FORMS SDF

Trade Name * Orga Legal Name * testing SDL Number * L12345678

GENERAL DETAILS CONTACT DETAILS ADDRESS DETAILS

Registration Number * 20175678 SDL Number Type * L Number

Organisation Registration Number Type * Company Registration Number SARS Number * 123455

Number of Employees * 4 Number of Employees as Per the Employment Profile 4

Terminated Employees * 0 SIC Code * 23000 - Mining of gold and uranium ore

Organisation Size * Small(0 - 49) Sub Sector *

Organisation Type * Parent Chamber Code * Unknown

☐ Confirm Details

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Contact Details - These are compulsory, and all Compulsory Fields should be completed – Ensure the email address captured is valid and spelled correctly as all correspondence will be sent to the email address captured.

Organisation > testing - L12345678

LINK ORGANISATIONS WSP & ATR FORMS SDF

Trade Name * Orga Legal Name * testing SDL Number * L12345678

GENERAL DETAILS CONTACT DETAILS ADDRESS DETAILS

Organisation Email Address * badoro@solugrowth.com

Organisation Fax Number Organisation Phone Number * 0115551234

Address Details These are compulsory, and all Compulsory Fields should be completed.

Organisation > testing - L12345678

LINK ORGANISATIONS WSP & ATR FORMS SDF

Trade Name *	Legal Name *	SDL Number *
Orga	testing	L12345678

GENERAL DETAILS CONTACT DETAILS ADDRESS DETAILS

☐ Use Physical Address for Postal Address?

Address		GPS Coordinates
Physical Address 1 *		Postal Address Line 1 *
1 Klarinet Road		7 Anerley Road
Physical Address 2 *		Postal Address Line 2 *
Menlo Park		Parktown
Physical Address 3 *		Postal Address Line 3
Pretoria		Johannesburg
Physical Code *		Postal Code *
0102		2193
Province		Province
Gauteng		Gauteng
Municipality		Municipality
Tshwane Metro		Tshwane Metro
Urban Rural *		Urban Rural *
Urban		Urban
Suburb		Suburb
Menlo Park		Menlo Park
City		City
Menlo Park		Menlo Park

Note: Please ensure to Confirm the Details by clicking inside the tick box and click on the Save Button.

Organisation > testing - L12345678

LINK ORGANISATIONS WSP & ATR FORMS SDF

Trade Name *	Legal Name *	SDL Number *
Orga	testing	L12345678

GENERAL DETAILS CONTACT DETAILS ADDRESS DETAILS

Registration Number *	SDL Number Type *
20175678	L Number
Organisation Registration Number Type *	SARS Number *
Company Registration Number	123455
Number of Employees *	Number of Employees as Per the Employment Profile
4	4
Terminated Employees *	SIC Code *
0	23000 - Mining of gold and uranium ore
Organisation Size *	Sub Sector *
Small(0 - 49)	
Organisation Type *	Chamber Code *
Parent	Unknown

☒ Confirm Details

Once saved successfully the below message will display.

Organisation > testing - L12345678

LINK ORGANISATIONS WSP & ATR FORMS SDF

Organisation Details Updated Successfully

Trade Name *

Orga

GENERAL DETAILS CONTACT DETAILS ADDRESS DETAILS

Registration Number *

20175678

Organisation Registration Number Type *

Company Registration Number

Number of Employees *

4

Terminated Employees *

0

Organisation Size *

Small(0 - 49)

Organisation Type *

Parent

☒ Confirm Details

2. Contact - This section is Compulsory

Contact Details can be captured.

Organisation > Contacts > Pilot Test 7 - L030813705

Title	First Name	Surname	Designation	Telephone Number	Cell Phone Number	Fax Number	Email	Province

Add Organisation Contact.

Add Organisation Contact

Title
Adv

First Name *
Test

Surname *
Test Surname

Designation
Tester

Telephone Number *
0117850909

Cell Phone Number *
0981231212

Fax Number

Email *
test@gmail.com

Province
Gauteng

SAVE

CANCEL

Once The Save button is clicked the details will save and display as follows:

Organisation > Contacts > Pilot Test 7 - L030813705

Title	First Name	Surname	Designation	Telephone Number	Cell Phone Number	Fax Number	Email	Province
Adv	Test	Test Surname	Tester	0117850909	0981231212		test@gmail.com	Gauteng

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There is an option to Add, Edit or Delete the Contact Details.

Organisation > Contacts > Pilot Test 7 - L030813705

Title	First Name	Surname	Designation	Telephone Number
Adv	Test	Test Surname	Tester	0117850909

3. Bank Details - This section is Compulsory

Bank Details captured during the SDF Registration process will automatically populate onto this section.

Organisation > Banking Details > Pilot Test 7 - L030813705

BANKING DETAILS

Account Holder *	dkidgpgjy	Bank Name *	ABSA
Account Type *	Credit	Account Number *	65884768
Branch Name *	5475w7	Branch Code *	rwurely
The Administrative Details Given Above Are Correct *	Yes	The Banking Details Given Above Are Correct *	Yes
The Banking Details Given Above Have Changed *	Yes	Newly Registered Company? *	Yes
Captured By	Adele Van Brakel	Captured On	03/03/2023
Registration Date			

☐ Confirm Details

Once the Banking details are verified, please ensure to select the Tick Box to Confirm the banking Details and then click on save.

Organisation > Banking Details > Pilot Test 7 - L030813705

BANKING DETAILS

Account Holder *	dkidgpgjy	Bank Name *	ABSA
Account Type *	Credit	Account Number *	65884768
Branch Name *	5475w7	Branch Code *	rwurely
The Administrative Details Given Above Are Correct *	Yes	The Banking Details Given Above Are Correct *	Yes
The Banking Details Given Above Have Changed *	Yes	Newly Registered Company? *	Yes
Captured By	Adele Van Brakel	Captured On	03/03/2023
Registration Date			

☒ Confirm Details

Once Save the following will display:

Organisation > Banking Details > Pilot Test 7 - L030813705

☒ Organisation Bank Details Saved Successfully

4. Link Organisations - This section is Optional.

To add a Child Company, select the Icon below labelled Link Organisation.

Organisation > Link Organisations > Pilot Test 12 - L030816393

Legal Name	Trade Name
SDL Number	

☒ ☐ ☐

The following window will display.

Link Organisation

Link Start (Financial Year) *

Link End (Financial Year) if applicable

Child Organisation *

Q

UPLOAD LINKING REQUEST

SAVE

CANCEL

Complete the sections Link start (Financial Year).
Select from the dropdown menu the current financial year.

Link Organisation

Link Start (Financial Year) *
01 April 2026 - 31 March 2027

Complete the sections Link End (Financial Year) if applicable.
Select from the dropdown menu the financial year as example:

Link End (Financial Year) if applicable
01 April 2027 – 31 March 2028

Link the Child Organisation next by clicking on the Magnifying Glass.

Child Organisation *

Q

The following window will display:

Skills Organisations

Legal Name

Trade Name

SDL Number

Q

Legal Name	Trade Name	SDL Number
testedBy Mpho	L1aanbb	E0003
AA SUPERMARKET	AA SUPERMARKET	L140724446
Test Organisation	Test Organisation	L00080000
MQA Test Organisation 712	MQA Test Organisation 712	N000000006
MQA Test Organisation 8	MQA Test Organisation 8	L893720000
MQA Test L700734298	MQA Test L700734298	L700734298
MQA Test L200717298	MQA Test L200717298	L200717298
MQA Test L123333789	MQA Test L123333789	L123333789
MQA Test L120750270	MQA Test L120750270	L120750270
MQA Test L124444789	MQA Test L124444789	L124444789

Type in the SDL number of the Child Company and click on Save.

Once the Child Company is then linked to the Parent the following screen will display"

 Child Organisation Linked Successfully



 |
  |
  |
 

Rules:

- Only a Parent Company can link a Child Company
- More than Child can be linked to one Parent.
- If a Child Company is already linked to another Parent the linking will be unsuccessful, refer to screenshot below:

 Linking not allowed: Child Organisations (L00080000) exists as a Parent Organisation for the selected Link Start Financial Year and Link End Financial Year combination.

Once the Linking is successful, the Child Company will be displaying in the window below:

LegalName	SDL Number	Link Start Date	Link End Date	Number Of Employees
Child Test	L010714139	01/04/2023	31/03/2026	1

5. Training Committee/Union – This section is Optional.

To add a Training Committee member, click on the add Sign.

 Mining Qualifications Authority (MQA)



 |
  |
  |
 

Title	First Name	Surname	ID

Once all the information is captured click on Save.

Add Organisation Training Committee Member

Title Dr	First Name * Test
Surname Surname Test	ID Number 7004300000082
Initials T	Designation * Training Manager
Telephone Number * 0119084567	Cellphone Number * 0839091010
Fax Number	Email * Test@gmail.com
NameOfUnion Test	PositionInUnion Secretary

 **SAVE** **CANCEL**

There is an option to Add, Edit or Delete the Contact Details.

Organisation > Training Committee > Pilot Test 7 - L030813705



Title	First Name	Surname	ID Number
Dr	Test	Surname Test	7004300000082

6. CFO Details – This section is Compulsory.

CFO Details required to be captured.

Organisation > CFO Details > Pilot Test 7 - L030813705



ORGANISATION CFO DETAILS

First Name *	Surname *
Cellphone Number *	Fax Number
Email *	

Once the details are captured click on Save.

Mining Qualifications Authority (MQA)

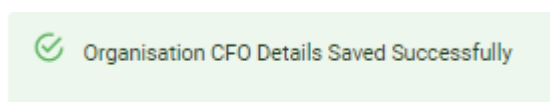
Organisation > CFO Details > Pilot Test 7 - L030813705



ORGANISATION CFO DETAILS

First Name * CFO TEST	Surname * CFO Surname
Cellphone Number * 0902126060	Fax Number
Email * Test@gmail.com	

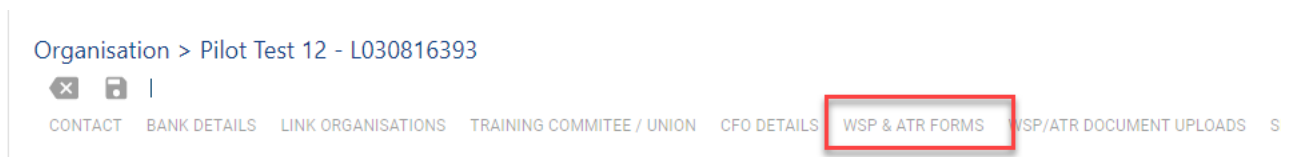
Once Saved the following will display.



WSP & ATR FORMS

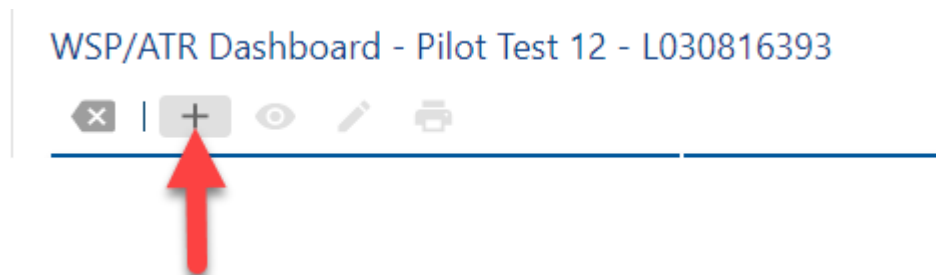
Step 1

Click on the Tab named WSP & ATR FORMS.



Step 2

Click on the Icon to Create/add WSP & ATR.



Step 3

Select the current Financial Year and the Form Type from the dropdown menu.

A screenshot of the 'Create WSP/ATR' form. It features two dropdown menus side-by-side. The first dropdown is labeled 'Financial Year *' and shows the selected range '01 April 2026 - 31 March 2027'. The second dropdown is labeled 'Form Type *'. Both dropdowns are enclosed in a red rectangular box. To the right of the dropdowns are two buttons: 'SAVE' and 'CANCEL'. A red arrow points to the 'SAVE' button.

Rule: The Form type is validating the number of Employees captured on the Organisation, General Tab details. Please ensure the correct number of employees is reflecting as per selection on the form type.

A screenshot of the 'Organisation > Pilot Test 12 - L030816393' form. The 'GENERAL DETAILS' tab is highlighted with a red box. The form contains several input fields. The 'Number of Employees *' field is highlighted with a red box and contains the value '350'. Other fields include 'Trade Name *' (Pilot Test 12), 'Legal Name *' (Pilot Test 12), 'Registration Number *' (Pilot Test 12), 'SDL Number Type *' (L Number), 'Organisation Registration Number Type *' (Company Registration Number), 'SARS Number *' (100008765), 'Terminated Employees *' (0), 'Number of Employees as Per the Employment Profile' (0), 'Organisation Size *' (Large(150+)), 'SIC Code *' (24000 - Mining of metal ores, except gold and uranium), 'Organisation Type *' (Parent), 'Sub Sector *' (Diamond Processing), and 'Chamber Code *' (Other Mining). A checkbox labeled 'Confirm Details' is checked at the bottom.

Step 4

Select the row of the form that has been created by clicking anywhere in the row as per below.
Once selected the colour will change.

WSP/ATR Dashboard - Test Organisation - L000000000



Financial Year	Form Type	WSP Status	Due Date	Submitted Date
01 April 2026 - 31 March 2027	Large (150 and more permanent)	Capturing	30/04/2026	

The icons will also be active.

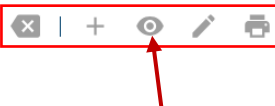
WSP/ATR Dashboard - Pilot Test 2 - L030807152



Step 5

Select the View WSP/ATR Icon.

WSP/ATR Dashboard - Pilot Test 2 - L030807152



Then following window will display:

BACK TO WSP/ATR DASHBOARD

WSP & ATR Forms

01 April 2026 - 31 March 2027

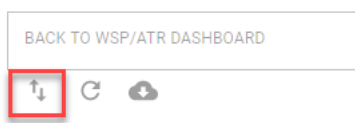
Test Organisation - L000000000

WSP/ATR Status : Capturing

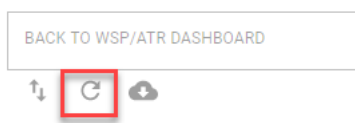
Import Date	Import FileName	Import Progress	Import Status Code	Import Status	Report
07/10/2025 15:28	2026WSPATRTemplateV1 (2).xlsx	Completed	100	WSP ATR Import Successful. Please refer to report for more information.	WSPATRImporReport_L000000000_4523_638954477546336063.xlsx

The icons are explained below:

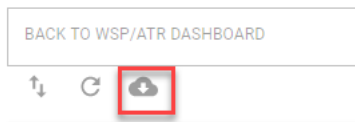
Import WSPATR Form.



Check Import Progress.

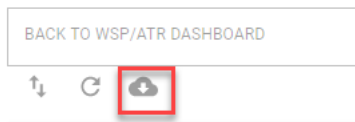


Download WSPATR Import Template.

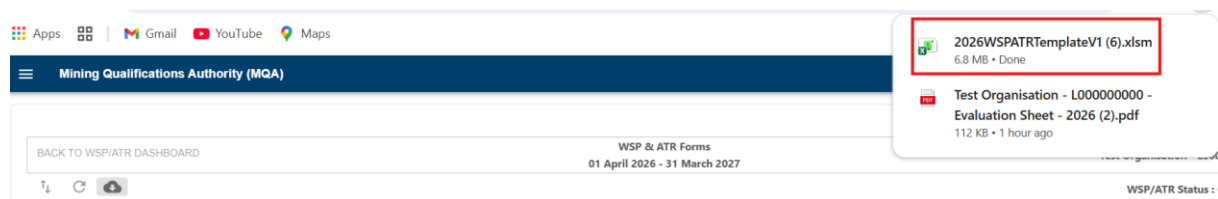


Step 6

Select the Download WSP/ATR Import Template.



Once selected the Excel Workbook will download on the bottom left of your screen:



Step 7

Double Click to Open the Excel Workbook:

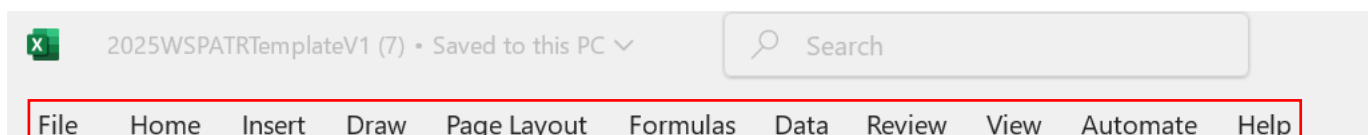


Step 8

Save the Workbook

Once the Workbook has been downloaded, please follow the steps below before capturing any data on the sheet.

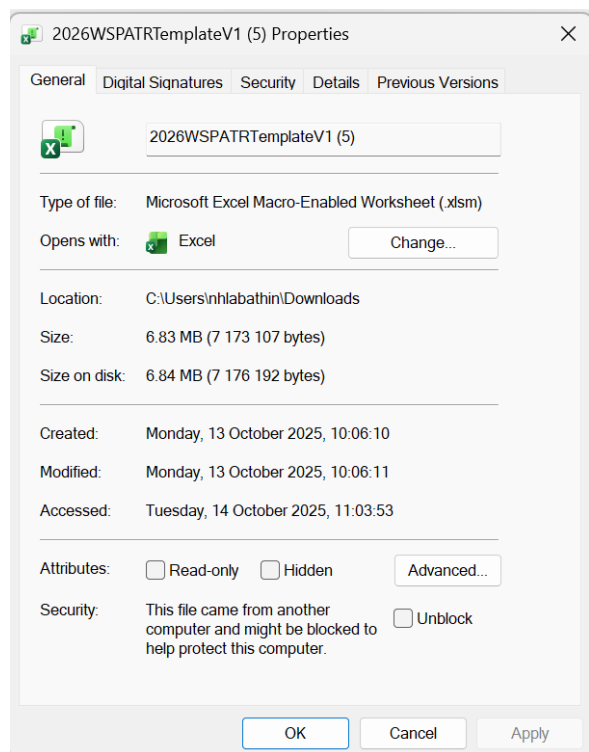
The section in yellow indicates that the workbook is not secured.



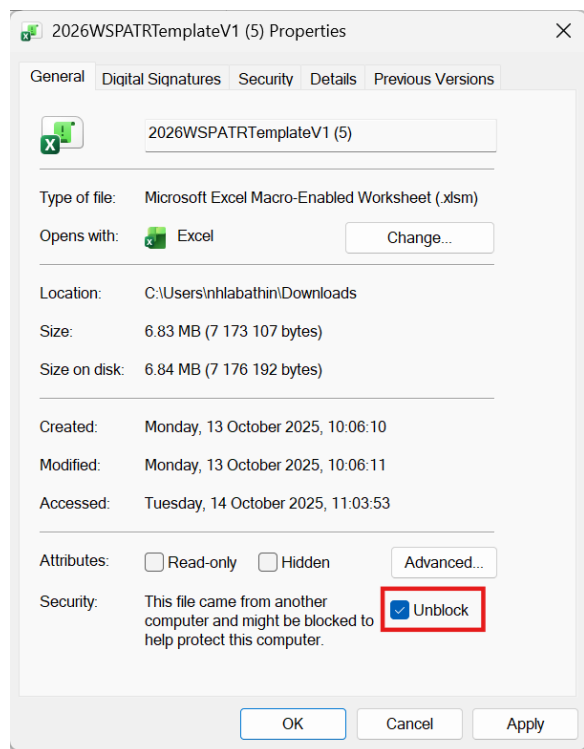
Step 1 – Save the workbook.

Step 2 - Right click on the Excel workbook in the Directory the workbook has been saved.

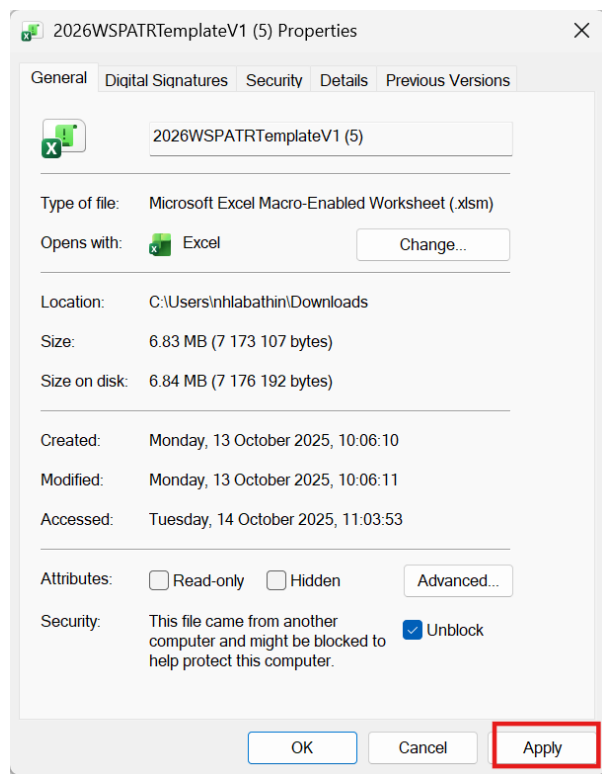
Step 3 – Select properties, the below screen will display.



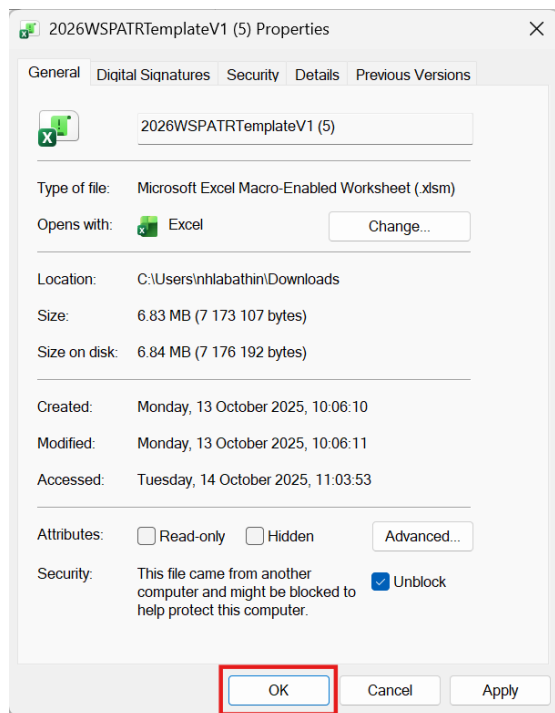
Step 4 – Please select the Security tick box, refer to screenshot below.



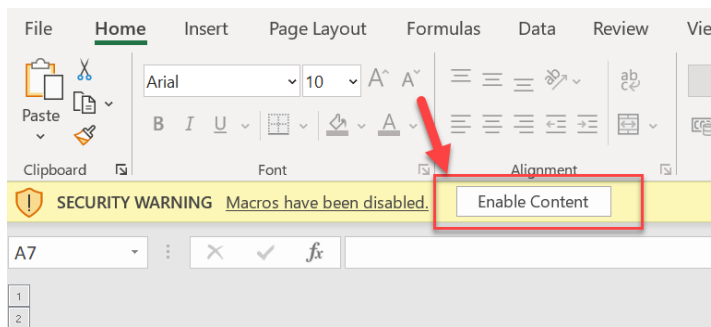
Step 5 – Click on Apply.



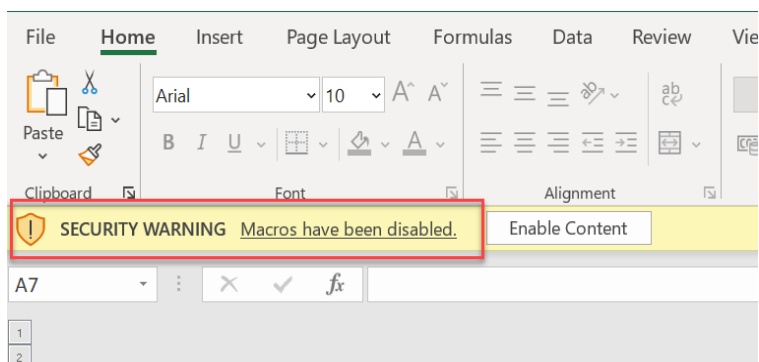
Step 6 – Click on OK.



Step 7 - Open the workbook and select Enable Content.



The Security Warning in Yellow indicates that the macros have been disabled and makes the workbook trusted.



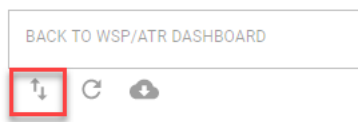
You can now continue capturing the content of the workbook.

Please make sure that you Save your workbook regularly to avoid any data being lost.

Uploading of Source Data Template.

Once the workbook is completed select the following Icon

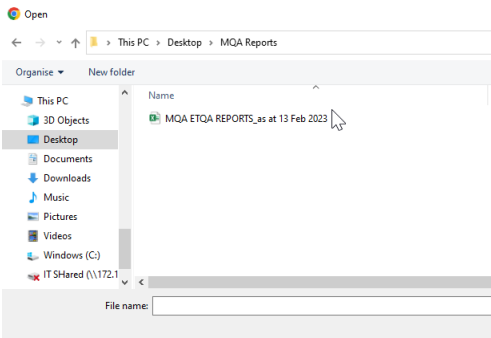
Import WSPATR Form.



Click on the Button "'Upload WSPATR File'".

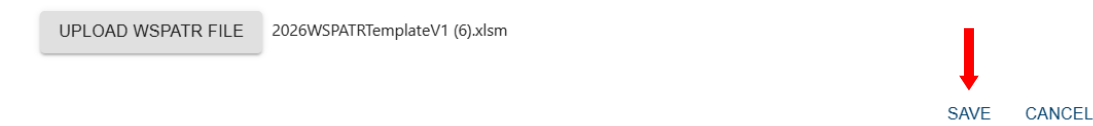


Navigate to the directory where the completed template is saved on your device.



Then Click on the Save Button.

Import WSPATR



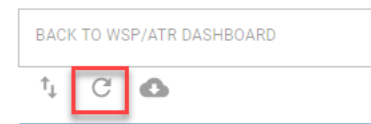
Once the workbook is uploaded it will be added to queue for import, refer to screenshot below:

WSP ATR Import File successfully added to the queue for import.

BACK TO WSP/ATR DASHBOARD		WSP & ATR Forms 01 April 2026 - 31 March 2027		Test Organisation - L000000000	
		WSP/ATR Status : Capturing			
Import Date	Import FileName	Import Progress	Import Status Code	Import Status	Report
30/10/2025 10:18	2026WSPATRTemplateV1 (6).xlsx	In Progress	0	WSP ATR Import in Progress.	
07/10/2025 15:28	2026WSPATRTemplateV1 (2).xlsx	Completed	100	WSP ATR Import Successful. Please refer to report for more information.	WSPATRimportReport_L000000000_4523_638954477546336063.xlsx

Note the status of the Import Progress is "In Progress" and the Import Status is "WSP ATR Import in Progress".

Please navigate to the Icon named : Check Import Progress.



Note the status of the Import Progress is "Completed" and the Import Status is "WSP ATR Import Successful. Please refer to report for more information."

BACK TO WSP/ATR DASHBOARD		WSP & ATR Forms 01 April 2026 - 31 March 2027		Test Organisation - L000000000	
		WSP/ATR Status : Capturing			
Import Date	Import FileName	Import Progress	Import Status Code	Import Status	Report
30/10/2025 10:18	2026WSPATRTemplateV1 (6).xlsx	Completed	100	WSP ATR Import Successful. Please refer to report for more information.	WSPATRimportReport_L000000000_4523_638974163368963576.xlsx

The Import Status Codes

Code = 0 WSP ATR Import in Progress.

Code 100 = WSP ATR Import Successful – This implies that the workbook uploaded does not contain any error and the workbook is successfully uploaded and the SDF can proceed with the WSP ATR Submission.

Code 101 = Incorrect Template Used – This implies that you need to download the most recent version of the workbook.

Code 102 = A system error has occurred. Please contact your system administrator System – This is implying that there is a major error on the data. Please inform MQA and provide the workbook that was used for the upload.

Code 103 = "WSP ATR Import File could not be uploaded", This is implying that there is a major error on the data. Please inform MQA and provide the workbook that was used for the upload.

Code 104 = WSP ATR Import Completed with errors. Data was not imported into system. Please refer to report for more information. – This implies that the workbook uploaded has errors and the entire upload is rejected. The SDF will not be able to submit a WSP ATR if this code persists.

Example below indicates an upload with Import status code 104.

BACK TO WSP/ATR DASHBOARD

WSP & ATR Forms
01 April 2026 - 31 March 2027

Test Organisation - L00000000

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WSP/ATR Status : Capturing

Import Date	Import FileName	Import Progress	Import Status Code	Import Status	Report
16/09/2024 15:55	8da0ce20-e598-4b32-a35e-48f6b531826f.xlsm	Completed	104	WSP ATR Import Completed with errors. Data was not imported into system. Please refer to report for more information.	WSPATRimportReport_L00080000_1_638620989355596634.xlsx

The workbook reflecting the errors can be downloaded on this section as per screenshot below.

BACK TO WSP/ATR DASHBOARD

WSP & ATR Forms
01 April 2026 - 31 March 2027

Test Organisation - L000000000

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WSP/ATR Status : Capturing

Import Date	Import FileName	Import Progress	Import Status Code	Import Status	Report
16/09/2024 15:55	8da0ce20-e598-4b32-a35e-48f6b531826f.xlsm	Completed	104	WSP ATR Import Completed with errors. Data was not imported into system. Please refer to report for more information.	WSPATRimportReport_L00080000_1_638620989355596634.xlsx

Once the report is opened navigate to each sheet of the workbook. In the last two columns the Import status will display as well as the Error Description.

ImportStatus															
Birth Year	Gender	Race	Disabled	SACitizen	Province	Municipal Highest Q	Specify fit Employm	Employment	Occupatio	Organisati	Post Refere	Job Title	OFO Occu	OFO Spec	OFO Occu
1061965	Male	African	No	Yes	North_We	Bojanala F	Other	Engineeri	Terminate	2010	Skilled tei	Kroondal	C1	Artisan Fit	2021-6523 Fitter and Fitter and
1071988	Male	African	No	Yes	North_We	Bojanala F	Other	Engineeri	Terminate	2016	Skilled tei	Kroondal	C1	Artisan Fit	2021-6523 Fitter and Fitter and
1081976	Male	African	No	Yes	North_We	Bojanala F	Other	Engineeri	Terminate	2015	Skilled tei	Kroondal	C1	Artisan Fit	2021-6523 Fitter and Fitter and
1091986	Male	African	No	Yes	North_We	Bojanala F	Diploma /	Engineeri	Employed	2020	Skilled tei	Kroondal	C1	Artisan Fit	2021-6523 Fitter and Fitter and
1101976	Male	White	No	Yes	North_We	Bojanala F	Other	Engineeri	Terminate	2005	Skilled tei	Kroondal	C1	Artisan Fit	2021-6523 Fitter and Fitter and
1111978	Male	African	No	Yes	North_We	Bojanala F	Other	Engineeri	Terminate	2013	Skilled tei	Kroondal	C1	Artisan Fit	2021-6523 Fitter and Fitter and
1121967	Male	White	No	Yes	North_We	Bojanala F	Other	Engineeri	Terminate	2011	Skilled tei	Kroondal	C1	Artisan Fit	2021-6523 Fitter and Fitter and
1131968	Male	White	No	Yes	North_We	Bojanala F	Grade 9/S	Engineeri	Terminate	2014	Skilled tei	Kroondal	C1	Artisan Fit	2021-6523 Fitter and Fitter and
1141980	Female	African	No	Yes	North_We	Bojanala F	Grade 10/	Engineeri	Employed	2007	Unskilled	RPM	A4	Artisans A	2021-8311 Shaft Assi Mining W
1151993	Female	African	No	Yes	North_We	Bojanala F	Grade 11/	Engineeri	Employed	2019	Unskilled	RPM	A4	Artisans A	2021-8311 Shaft Assi Mining W
1161988	Male	African	No	Yes	North_We	Bojanala F	Other	Engineeri	Employed	2008	Unskilled	RPM	A4	Artisans A	2021-8311 Shaft Assi Mining W

How to correct the Errors

On the sheet the Import status will indicate the row number on which the error appears. You should open your template and go to that specific sheet and row number and correct the data.

Each error will have a unique error description and needs to be corrected on the template.

Step 8: Follow step 7 again to upload the corrected template. You should get a successful status if the errors have been corrected.

BACK TO WSP/ATR DASHBOARD

WSP & ATR Forms

01 April 2026 - 31 March 2027

Test Organisation - L000000000

WSP/ATR Status : Capturing

Import Date	Import FileName	Import Progress	Import Status Code	Import Status	Report
30/10/2025 10:18	2026WSPATRTemplateV1 (6).xlsm	Completed	100	WSP ATR Import Successful. Please refer to report for more information.	WSPATRIImportReport_L000000000_4523_638974163368963576.xlsx

PRINT REPORT

The following steps need to be followed when the Print Report is Generated.

Step 1:

Click on Print WSP/ATR Report.



The following screen will display:

× Print WSP/ATR Report

StatusCompleted

Last Ran13/10/2025

DOWNLOAD FILE

GENERATE REPORT

CHECK PROGRESS

Step 2:

Click on Generate Report.

× Print WSP/ATR Report

StatusCompleted

Last Ran13/10/2025

DOWNLOAD FILE

GENERATE REPORT

CHECK PROGRESS

The following screen will display:

× Print WSP/ATR Report

StatusIn Progress

Last Ran30/10/2025

DOWNLOAD FILE

GENERATE REPORT

CHECK PROGRESS

Step 3:

Click on Check Progress.

×

Print WSP/ATR Report

Status

In Progress

Last Ran

30/10/2025

DOWNLOAD FILE

GENERATE REPORT

CHECK PROGRESS

Step 4:

Click on Download File.

×

Print WSP/ATR Report

Status

Completed

Last Ran

30/10/2025

DOWNLOAD FILE

GENERATE REPORT

CHECK PROGRESS

The PDF report will download on the bottom left of the screen.

×

Print WSP/ATR Report

Status

Completed

Last Ran

30/10/2025

DOWNLOAD FILE

GENERATE REPORT

CHECK PROGRESS

Apps

Gmail

YouTube

Maps

×

Print WSP/ATR Report

Recent download history

pdf

29ebcc23-c9e5-4e8a-ab8a-12de84c43b6b.pdf

73.3 KB • Done

Step 5:

Double Click to Download the Generated Report.

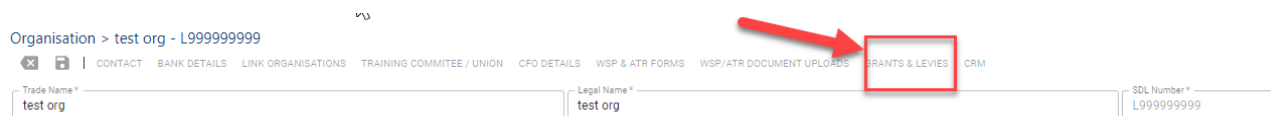
NOTE:

Please ensure you generate a new report then download after it has been generated as the system will download the previous report if a new one has not been generated.

GRANTS AND LEVIES

The following section will be explained on how to view The Grants and levies contributions made by the Organisation.

Step 1: Navigate to the Tab named Grants and levies.



Step 2: From the Dropdown list under section make the selection on either:

- Grant Summary
- Levy Summary
- Financial Summary

Organisation > Grants and Levies > test org - L999999999



Step 3: Select the Financial Year

Organisation > Grants and Levies > Test Organisation - L000000000



Step 4: Click on Print Report

Organisation > Grants and Levies > Test Organisation - L000000000



The detail will display on the Print Report



Client Relationship Management (CRM)

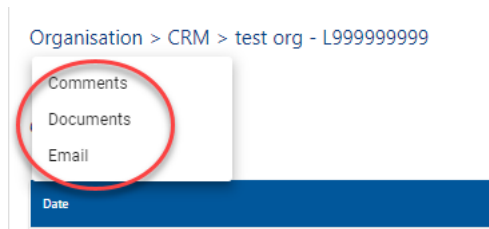
DOCUMENTS WILL BE UPLOADED UNDER CRM AND WSP/ATR DOCUMENT UPLOADS TABS.

The **Client Relationship Management** Section as referred to CRM can be found under the tab as per screenshot below.



There are 3 different Communication Types on the CRM

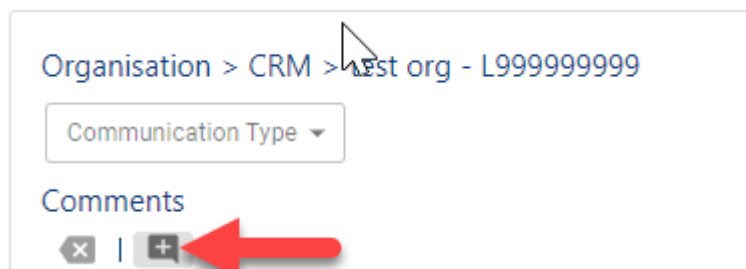
1. Comments
2. Documents
3. Email



1. Comments

This section is Optional and can be used to make a comment.

Step 1: To add a Comment, select the +



Step 2: Once the Comment is placed click on Save and the Comment will be recorded and display as per below.

- Display the date.
- Content of the Comment
- Comment By – this is the SDF making the comment and the name will display as such.

Organisation > CRM > test org - L999999999

Communication Type
Comments

Comments

Date	Comment	Comment By
13/03/2023	Bank Letter to be signed	Bred Bitt

2. Documents

This section of the CRM will enable you to upload supporting Documents and view the uploaded documents generated by the system. Compulsory documents for submission are:

- Signed SDF appointment Letter
- Signed Bank Letter

Step 1: To Upload a New Document, select the "Upload Document" Icon.

Organisation > CRM > test org - L999999999

Communication Type
Documents

Documents



Step 2: Select from the Dropdown options for the options the Document relates to:

New Document

Grants and Levies
InterSETA Transfer
Organisation Information
Proof of Consultation
SDF Registration
Signed Bank Letter
Signed SDF Appointment Letter
Signed WSP/ATR Report
WSP and ATR

SAVE CANCEL

Step 3: Select the Upload Document button and then Save.

The **WSP/ATR DOCUMENT UPLOADS** Section can be found under the tab as per screenshot below.

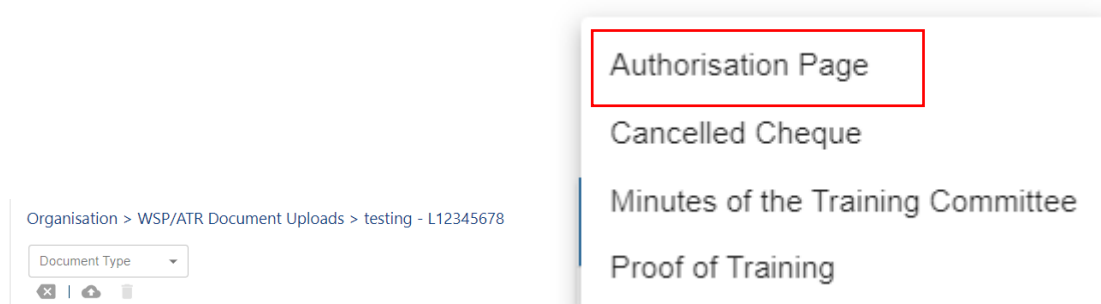


Signed WSP/ATR Report should be uploaded under the WSP/ATR document uploads tab.

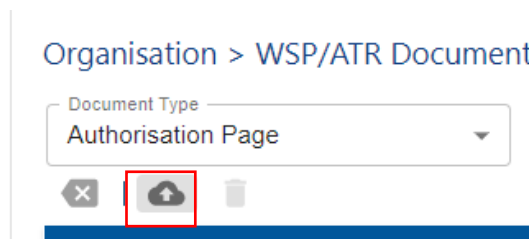
Step 1: To Upload a signed WSP/ATR report, navigate to WSP/ATR document uploads tab.



Step 2: Select Authorisation Page option from the document type field.



Step 3: Click the upload document button.



Step 4: Ensure the financial year selected is 2026/2027, upload the document and click save.

Upload Authorisation Page

Financial Year *
01 April 2026 - 31 March 2027

Comment

UPLOAD FILE 109fcaa2-5c05-494c-b098-d38dcba837ee.pdf

→ SAVE CANCEL

The uploaded document will display and can be viewed by using the hyperlink to the Document.

Financial Year	Comment	Document Type	Document	Uploaded By	Upload Date
01 April 2024 - 31 March 2025		Authorisation Page	batch 13648.pdf	Charlotte Matsha	2024/01/22 11:52:14

Step 5: To upload more documents, repeat step 1 and select a different option from the document type field.

Organisation > WSP/ATR Document Uploads > testing - L12345678

Document Type

Authorisation Page
Cancelled Cheque
Minutes of the Training Committee
Proof of Training

SUBMIT WSP&ATR

SUBMIT BUTTON

Step 1: To submit WSP&ATR form, select the WSP&ATR FORMS tab.

Organisation > testing - L12345678

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CONTACT

BANK DETAILS

LINK ORGANISATIONS

TRAINING COMMITTEE / UNION

CFO DETAILS

WSP & ATR FORMS

WSP/ATR DOCUMENT UPLOADS

SDF

Trade Name *

Test organisation

Legal Name *

testing

SDL Ni

L123

GENERAL DETAILS

CONTACT DETAILS

ADDRESS DETAILS

Step 2: Select the 2026/2027 WSP&ATR form and click on the view WSP/ATR button.

WSP/ATR Dashboard - Test Organisation - L000000000

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Financial Year	Form Type	WSP Status	Due Date
01 April 2026 - 31 March 2027	Large (150 and more permanent)	Capturing	30/04/2026

Step 3: Click on the submit WSP/ATR button on the top right to submit your WSP.

BACK TO WSP/ATR DASHBOARD

WSP & ATR Forms

01 April 2026 - 31 March 2027

Test Organisation - L000000000

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WSP/ATR Status : Submitted

Import Date	Import FileName	Import Progress	Import Status Code	Import Status	Report
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Step 4: Once the WSP/ATR is successfully submitted, the status will update to WSP/ATR Status: Submitted.

BACK TO WSP/ATR DASHBOARD

WSP & ATR Forms

01 April 2026 - 31 March 2027

Test Organisation - L000000000

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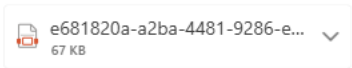
🔄

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WSP/ATR Status : Submitted

Import Date	Import FileName	Import Progress	Import Status Code	Import Status	Report
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Step 5: An automated email will be sent to the SDF email address as well as Receipt Letter



2024/11/14 00:00:00

L000000000
Test Organisation

We hereby acknowledge that your WSP application for financial year 01 April 2025 - 31 March 2026 has been submitted on the Indicum SETA Management System.

Should you require additional information please contact your SETA Administrator.

Yours Sincerely
Skills Management

Please do NOT reply to this message as it is sent from an unattended mailbox

Well Done if you have received the above you have successfully submitted your WSP/ATR for 2026.

SUBMISSION DEADLINE
30 APRIL 2026 AT MIDNIGHT

ALL THE BEST WITH THE
SUBMISSION