



How do I apply for a FASSET SETA grant - Checklist

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Instruct the wise and they  
will be wiser still; teach the  
righteous and they will  
add to their learning

*Proverbs 9:9*

## [Checklist]

This checklist can be used to tick off what needs to be done to be able to submit your Workplace Skills Plan (WSP) / Skills Development Plan (SDP).

Step	Instruction	Completed (Yes / No)								
Step 1	Obtain Skills Development Levy (SDL) number from the South African Revenue Services (SARS).	<input type="checkbox"/>								
Step 2	Register Skills Development Facilitator (SDF) with Finance and Accounting Services Sector Education and Training Authority (FASSET SETA).	<input type="checkbox"/>								
Step 3	Register SDF on the FASSET online portal: <a href="https://portal.fasset.org.za/">https://portal.fasset.org.za/</a> <b>Everything from hereon, must be done by the SDF.</b>	<input type="checkbox"/>								
Step 4	Log into the FASSET online portal and ensure that the SDF is linked to the entity.	<input type="checkbox"/>								
Step 5	Confirm the details of the entity on the system is correct.	<input type="checkbox"/>								
Step 6	Make a list of all employees' OFO codes, including specialisation (remember the list is on the portal under OFO codes): <table border="1" data-bbox="319 1014 1240 1088"> <thead> <tr> <th>Employee name</th> <th>Employee surname</th> <th>Employee OFO code</th> <th>Employee specialisation</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> This will assist when completing the WSP / SDP.	Employee name	Employee surname	Employee OFO code	Employee specialisation					<input type="checkbox"/>
Employee name	Employee surname	Employee OFO code	Employee specialisation							
Step 7	Press create at the top of the screen on the portal, to start to complete the WSP / SDP and Annual Training Plan (ATR).	<input type="checkbox"/>								
Step 8	Choose ATR to submit the previous year's training and skills development that took place.	<input type="checkbox"/>								
Step 9	Complete Tab 1: Actual training, by completing each column.	<input type="checkbox"/>								
Step 10	Complete Tab 2: Adult Education and Training, by completing each column.	<input type="checkbox"/>								
Step 11	Ensure your press save!	<input type="checkbox"/>								
Step 12	Complete Tab 3: Variance, by completing each column.	<input type="checkbox"/>								
Step 13	Ensure your press save!	<input type="checkbox"/>								
Step 14	Complete Tab 4: WSP Impact Assessment, by answering each question.	<input type="checkbox"/>								
Step 15	Ensure your press save!	<input type="checkbox"/>								
Step 16	Complete Tab 5: Upload documents for each learner / delegate's training that took place (including: attendance registers, certificates, and invoices)	<input type="checkbox"/>								

## [Checklist]

Step	Instruction	Completed (Yes / No)
Step 17	Ensure you press save!	<input type="checkbox"/>
Step 18	Make sure the employees counting up at the bottom of the screen is correct.	<input type="checkbox"/>
Step 19	Go back to the WSP details at the top of the form, and where you previously chose ATR, now choose WSP.	<input type="checkbox"/>
Step 20	Complete Tab 1: Total Employment Profile, by completing each column.	<input type="checkbox"/>
Step 21	Ensure you press save!	<input type="checkbox"/>
Step 22	Complete Tab 2: Planned Training, by completing each column.	<input type="checkbox"/>
Step 23	Ensure you press save!	<input type="checkbox"/>
Step 24	Complete Tab 3: Adult Education and Training, by completing each column.	<input type="checkbox"/>
Step 25	Ensure you press save!	<input type="checkbox"/>
Step 26	Complete Tab 4: Vacancies Hard to fill, by completing each column.	<input type="checkbox"/>
Step 27	Ensure you press save!	<input type="checkbox"/>
Step 28	Complete Tab 5: Documents uploads – Important, this is only required for employers with 50 or more employees.	<input type="checkbox"/>
Step 29	Ensure you press save!	<input type="checkbox"/>
Step 30	Make sure the employees counting up at the bottom of the screen is correct.	<input type="checkbox"/>
Step 31	Make sure everything is correct, and then press submit. Important to note: In previous years, signatures from the entity's Board (or relevant signatories), where required. This might be the case again, but as FASSET SETA just changed the system, it is not possible to confirm this.	<input type="checkbox"/>

Enjoy the journey and we trust you will reap the benefits in your business soon.

The SAIBA Academy Team & Altimax

