2026/27 Mandatory Grant Employee Profile Template

The Services SETA 2026/27 Mandatory Grant submissions open
from 02 February 2026 to 30 April 2026 at 24h00

The LMIS allows employees, interventions and classes through:

- Direct capturing on the LMIS
- Using the bulk excel option making use of MG_SOP_Annex_05_25-Mandatory Grant Employee Profile Template-Final

Should the skills development facilitator opt to make use of the bulk excel option we urge the user to follow the guidelines provided to accurately capture their data for proper submission.

The top rows of each sheet marked in **"Orange"** are the instructions to be followed for that specific collum.

The Employee Profile template consists of 3 sheets:

1. Employees
2. Training Interventions
3. Training Competed and Planned

Each sheet has an example highlighted in GREY which needs to be deleted before uploading onto the LMIS. The sheet can be uploaded multiple times as data is added to the document.

Please see below guidelines per sheet:

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1. Employees:

On this sheet the skills development facilitator must capture the following employees' biographic data:

- All employees employed at the time that the submission is made
- All employees who were terminated but training during the submission period
- All unemployed learners trained during the submission period

Please make use of the MG_SOP_ANNEX_MANDATORY GRANTS_CODE SHEET to accurately complete this section as the LMIS will reject any incorrect spelling or data.

Collum number and Description:	Action Required:
A: Companies SDL number	Must be the SDL number of the applicant company matching on the LMIS
B: Employee number	Each employee must have a unique number assigned by the employer's payroll
C: Employee's ID	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available. For the sheet to work add an apostrophe before capturing the ID, for example: '0101011001011
D: ID Type	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available
E: First name	Must match the employee's official identification information as per Home Affairs
F: Last name	Must match the employee's official identification information as per Home Affairs
G: Date of birth	South African IDs: The sheet has a formula to automatically determine the employee's date of birth. To have this option the user must pull the cell with the formula downwards. It will only work with national 13-digit ID numbers. Non-South African ID types, the data will have to be captured manually
H: Gender	South African IDs: The sheet has a formula to automatically determine the employee's gender. To have this option the user must pull the cell with the formula downwards. It will only work with national 13-digit ID numbers. Non-South African ID types, the data will have to be captured manually

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Collum number and Description:	Action Required:
I: Equity	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available
J: Disability	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available
K: Citizenship	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available
L: Municipality	**Copy and paste** from the MG_SOP_ANNEX_MANDATORY GRANTS_CODE SHEET

Must be an exact match otherwise the LMIS will reject the data |
| M: Highest qualification | This is a text field, so the user can capture the qualification based on it's informal description eg. "Matric" |
| N: Highest qualification type | **Copy and paste** from the MG_SOP_ANNEX_MANDATORY GRANTS_CODE SHEET

Must be an exact match otherwise the LMIS will reject the data |
O: Employment Type	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available
P: Employment Status	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available
Q: Job title	This is a text field, so the user can capture the job title based on the letter of appointment.
R: OFO Code	**Copy and paste** from the MG_SOP_ANNEX_MANDATORY GRANTS_CODE SHEET

Must be an exact match otherwise the LMIS will reject the data |

2. Training Interventions:

Collum number and Description:	Action Required:
A: Companies SDL number	Must be the SDL number of the applicant company matching on the LMIS
B: Intervention number	Each intervention must have a unique intervention number
	If the same intervention is present in the ATR and WSP periods, the intervention must be captured twice, once for each period, with different intervention numbers
C: Intervention Title	This is a text field, however where training is PIVOTAL use the office qualification name of the training eg: "Occupational Qualification: Project Management"
	For non-PIVOTAL training ensure that the description is clear and for the ATR matches the proof of training
D: Intervention type	Use the MG_SOP_ANNEX_06_25-WSP AND ATR INTERVENTION MATRIX to accurately plot the training
	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available
E: Band Level	Use the MG_SOP_ANNEX_06_25-WSP AND ATR INTERVENTION MATRIX to accurately plot the training
	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available
F: Intervention level	Use the MG_SOP_ANNEX_06_25-WSP AND ATR INTERVENTION MATRIX to accurately plot the training
	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available
G: Intervention Cost	Accurately capture the cost of ATR training which will show in Addendum C once captured on the LMIS. The Total Cost of all ATR learning programmes must be manually captured into the Delegation and Declaration form under **"Total personnel budget for this financial year"**
	For WSP the totals cost must be calculated manually and inserted post uploading onto the LMIS on the Delegation and Declaration form under **"Total planned budget for this financial year"**

Collum number and Description:	Action Required:
H: SAQA ID	PIVOTAL training must have an SAQA/QCTO number, claiming PIVOTAL and not providing accurate data deems the data to be unreliable
	Non-PIVOTAL data state Not Applicable
	Do not leave the field blank
I: Provider Name	External Training: State the name of the training provider who conducted the training. In case of multiple providers for the same intervention use the one mostly used
	Internal Training: State the name of the applicant company
J: ETQA	PIVOTAL state the official Quality Partner (SETA) who registered the qualification with the QCTO, not providing accurate data deems the data to be unreliable
	Non-PIVOTAL data state Not Applicable
	Do not leave the field blank
K: Accreditation number	PIVOTAL state the accreditation number of the Training Provider assigned by the QCTO, not providing accurate data deems the data to be unreliable
	Non-PIVOTAL data state Not Applicable
	Do not leave the field blank
L: PIVOTAL	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available
	If PIVOTAL state: Y
	If non-PIVOTAL state: N
M: External	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available
	If PIVOTAL state: Yes
	If non-PIVOTAL state: No
N: Will apply for Discretionary Grant?	The Services SETA Mandatory Grant and Discretionary Grant application processes are not linked. This section is only to provide the Services SETA with data for future Discretionary Grant considerations

3. Training Completed and Planned:

In this section data from the "Employees" sheet and the "Training Interventions" sheet are combined. There are formulas to help keep the records accurate, making use of the Employee No captured on the Employee No captured on the Employees Sheet and the Intervention No captured on the Training Interventions Sheet. To use the formula

Collum number and Description:	Action Required:
A: Companies SDL number	Must be the SDL number of the applicant company matching on the LMIS
B: Intervention number	Must capture the intervention number as stated in the Training Interventions tab – exact match required
C: Intervention Title	Formula on sheet: will auto-populate the information captured on the Training Intervention tab – exact match required
D: Employee Number	Must capture the Employee number as stated in the Employees tab – exact match required
E: Employee ID	Formula on sheet: will auto-populate the information captured on the Employees tab – exact match required
F: Employee Name	Formula on sheet: will auto-populate the information captured on the Employees tab – exact match required
G: Employee Intervention status	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available
H & I: Start date & End date	The dates per Interventions status must match the period the training falls in: **Achieved: 2024/04/01 – 2025/03/31** **Enrolled: 2024/04/01 – 2025/03/31** **Planned: 2025/04/01 – 2026/03/31**
J: Learning Mode	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available
K: Appointment section	Look at the instructions on the sheet marked in **"Orange"** must be exactly as the options available 18.1 – refers to employed persons 18.2 – refers to unemployed person Capture only either: **18.1** or **18.2**