
CRITERIA & GUIDELINES

Database Support - Providers

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Criteria & Guideline: Introduction

1 *Content of the Criteria & Guideline Document*

The *Criteria an Guideline* document covers the following aspects regarding the THETA *Database Support* for providers:

- 1 System Introduction
- 2 Learner Management Flow-Charts
- 3 System Access
- 4 Data Management
- 5 Learner Import
- 6 Glossary of Terms

2 *Additional Support*



The **THETA web-site** is www.theta.org.za and contains all the policy documents and resources mentioned in this document. All **unit standards and qualifications** within the THETA accreditation scope may also be found on the THETA web-site.

Should any further assistance be required, a **THETA Quality Assuror** will be able to assist potential providers in queries at:

Tel: (011) 803-6010.
Fax: (011) 803-6702
Email: theta@theta.org.za

3 Navigating the Criteria & Guideline document

The following icons are used in this document to assist you in finding information:

Icon	Use
	Critical Step / requirement
	Notes

4 Purpose of this Criteria & Guideline document

The purpose of this document is to:

- Provide an overview of the database services offered to the THETA provider
- Provide step-by-step assistance to providers in accessing and utilizing the THETA Database for learner management

Acknowledgements:

This document enables the provider to access the **Deloitte MIS system** that supports all THETA data in the ETQA and Learnerships division.

THETA wishes to thank **Deloitte** for their kind assistance in drafting the Provider Manual that forms the basis of this Criteria & Guidelines document. We appreciate the effort and quality that has gone into it!

1. System Introduction

1.1 System Background



ETD QMS Policy Requirement:

Every provider is required to maintain a database as part of the quality management system.

Providers are also required to report on learner management on a regular basis to the SETA where the qualifications are housed. Such information, at minimum, includes:

- Learner registration
- Learner terminations or achievements
- Assessors and moderator registrations

A Turn-key system

THETA has implemented a web-enabled MIS (Management Information System) as a total turn-key solution to all THETA information requirements. The MIS manages the following aspects for THETA:

1. THETA Levies and grants payments
2. Workplace Skills Plan
3. Learnership Agreements
4. Learner registrations, terminations, achievements and certification
5. Provider accreditation and registrations
6. Programme scope and assessor / moderator registration
7. Skills programme and qualification framework

1.2 Stakeholder Support

In order to minimize errors and delays through data capturing, THETA has provided access to its database to constituent organizations and providers to enable them to manage their own affairs regarding the following:

- Workplace skills plan
- Implementation report
- Registering learnership agreements
- Logging learner registrations, terminations and achievements



THETA Provider Assistance:

Providers are also required to report on learner management on a regular basis to the SETA where the qualifications are housed. Such information, at minimum, includes:

- Learner registration
- Learner terminations or achievements
- Assessor and moderator registrations

Direct access to the THETA Database to capture such information will enable THETA to report to the relevant authorities “real-time”, in the correct format required, and without additional work required on the provider side.

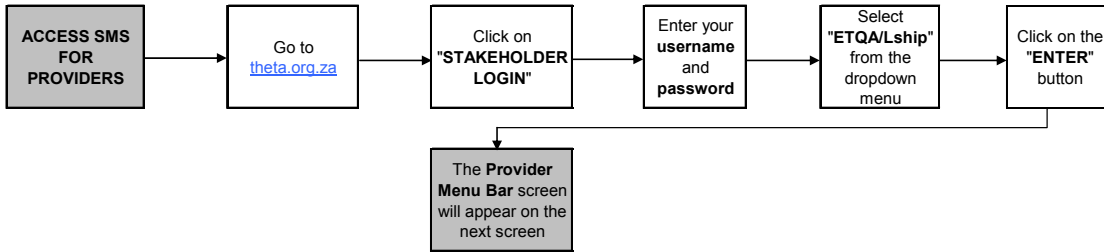


System Requirements:

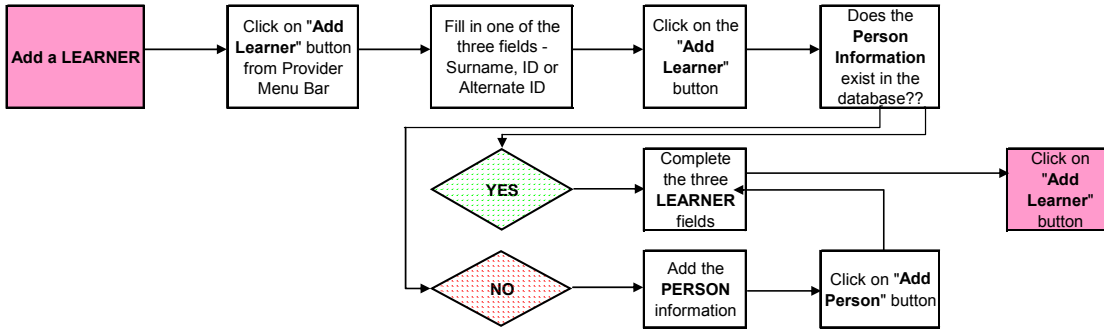
- The provider is required to have *access to the internet* and THETA’s web-site in order to log onto the THETA system.
- Each provider will only have *access to his own records* to view or add / edit information.
- Each provider will be provided with a *username and password* to be able to log onto the system.

2. Learner Management Flow-charts

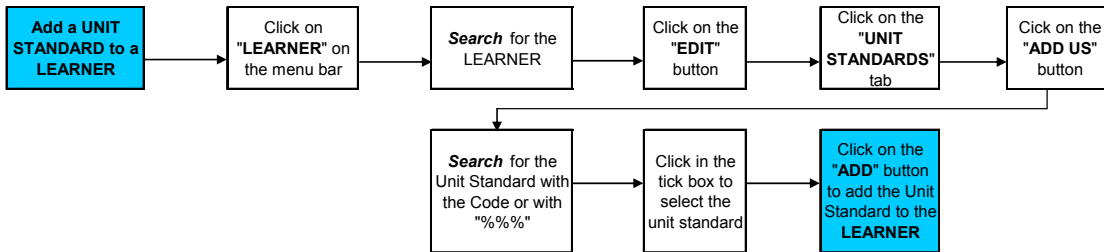
STEP BY STEP FLOWCHART



NOTE: It is *Very Important* to ensure that your Provider Details are captured on the system before you will be able to have access to it.

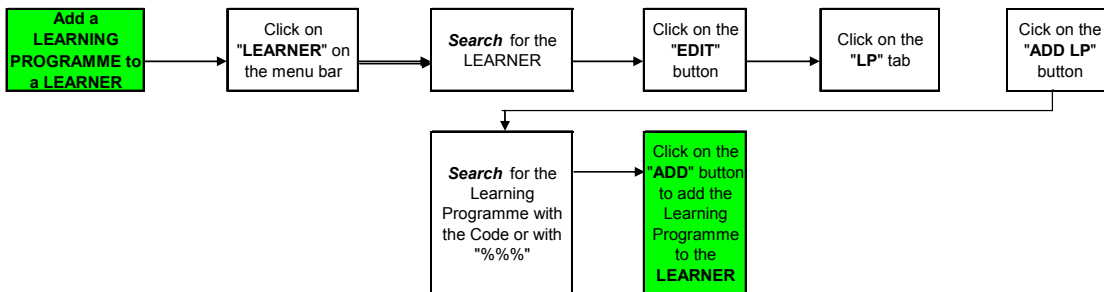


NOTE: The system will determine if the person information of the Learner exist, if it do exist you will only need to complete the three Learner Status fields, if it do not exist, the system will ask you if you want to add the information. When you click on the "Yes" button, it will bring up the screen where you can add the information.



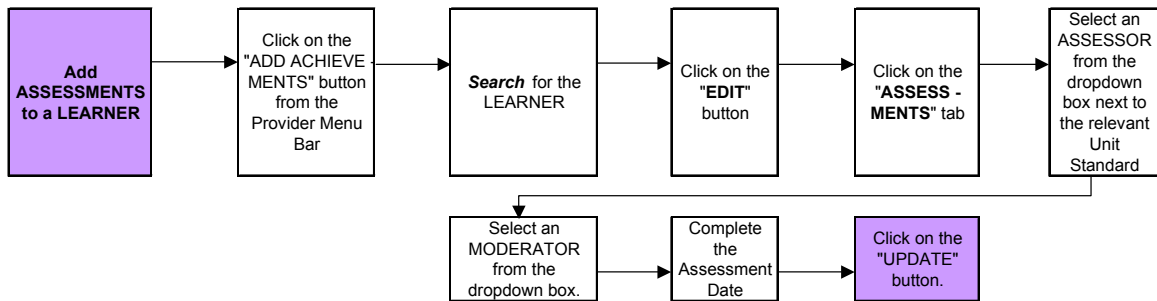
NOTE 1: Only the Unit Standards that is part of the scope of the Provider will appear in the result of the search.

NOTE 2: It is very useful to have the SAQA codes of the Unit Standards ready when you need to add a Unit Standard.

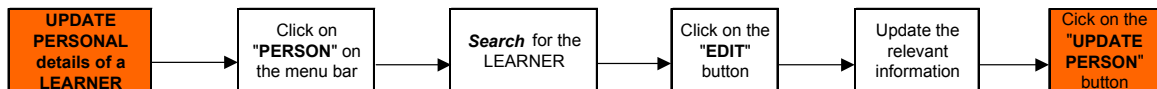


NOTE: Only the Learning Programme that has been approved by the ETQA will appear on the system.

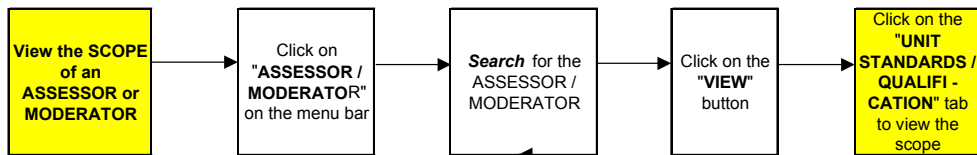
Criteria & Guidelines: Database Support for Providers



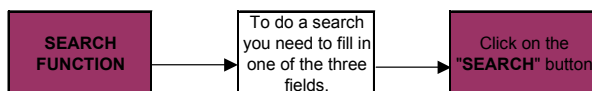
NOTE 1: The **ASSESSOR** field is a **compulsary** field. The system will not accept the update of the achievement if there is no assessor.
NOTE 2: Only the **ASSESSORS** linked to the **Provider** and where the **Unit Standard** is part of their **scope** will appear in the dropdown box.
NOTE 3: The **MODERATOR** field is **not a compulsary** field as only a sample of 10% needs to be moderated as per ETQA requirements.
NOTE 4: The **ASSESSMENT DATE** field is a **compulsary** field.



NOTE: You can only update PERSONAL details of the LEARNER on the PERSON page, for example, address information or contact details. To edit details regarding the learner status for example, you need to go to the LEARNER and edit the details there.



NOTE: The scope of the Assessor is the Unit Standards that the Assessor is either competent in or has the technical competencies



NOTE: To do a generic search to get a list of all the specific data enter three percentage signs (%%%) in the search field.



THETA Provider Assistance:

We have created the flow charts above for quick and easy reference, below is further explanations with pictures on the flow charts above to make it easier for you.

3. System Access



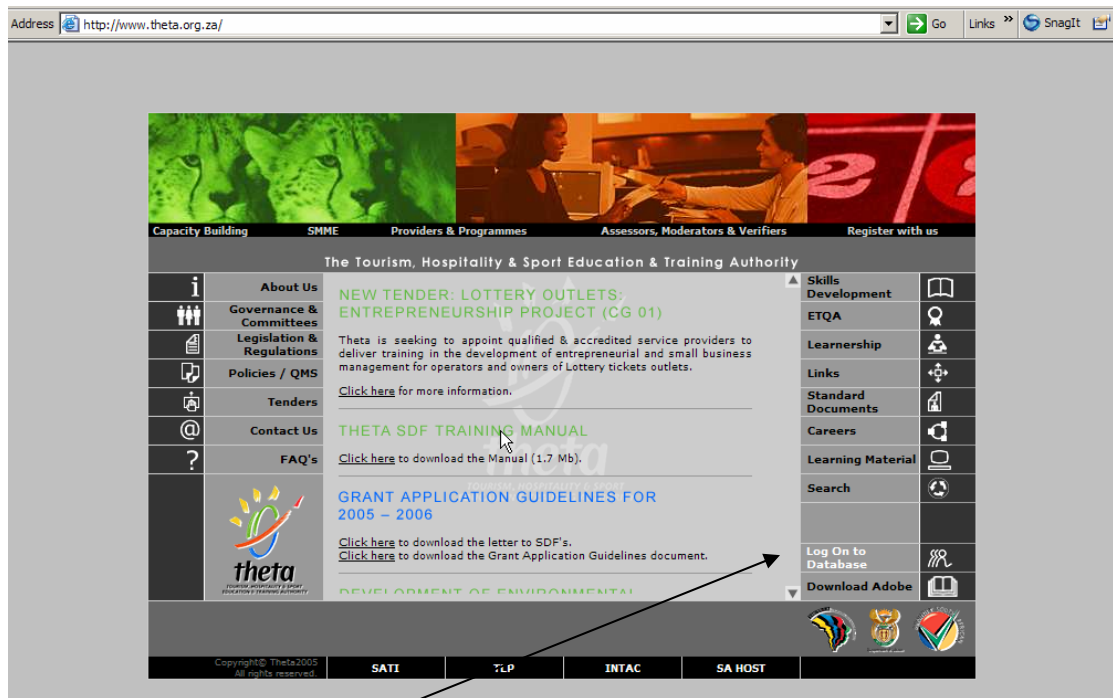
Notes:

It is **Very Important** to ensure that your Provider Details are captured on the system before you will be able to access the system.



Step 1:

Go to the THETA web-site: theta.org.za



Step 2:

Click on "Log on to Database"

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Step 3:

Enter your **username** and **password**



The screenshot shows the login interface for the theta system. At the top left is the theta logo. Below it is a horizontal banner with five images: two hands shaking, a person's face, a jersey with the number 22, a stack of red bricks, and a waterfall. The login form contains the following elements:

- Username:
- Password:
- Logon to: Skills - Current Year (dropdown menu)
- Enter button
- Change Password button

A red oval highlights the Username and Password fields. A hand cursor icon points to the dropdown menu, and a line connects it to Step 4. Another line connects the Enter button to Step 5. Below the form is the text "Register as a Skills Development Facilitator" and a footer note: "This site is best viewed in Microsoft Internet Explorer 6.0 or higher with a Screen Resolution of 1024x 768" with an Internet Explorer icon.



Step 4:

Select **ETQA/Lship** from the dropdown menu



Step 5:

Click on the **ENTER** button

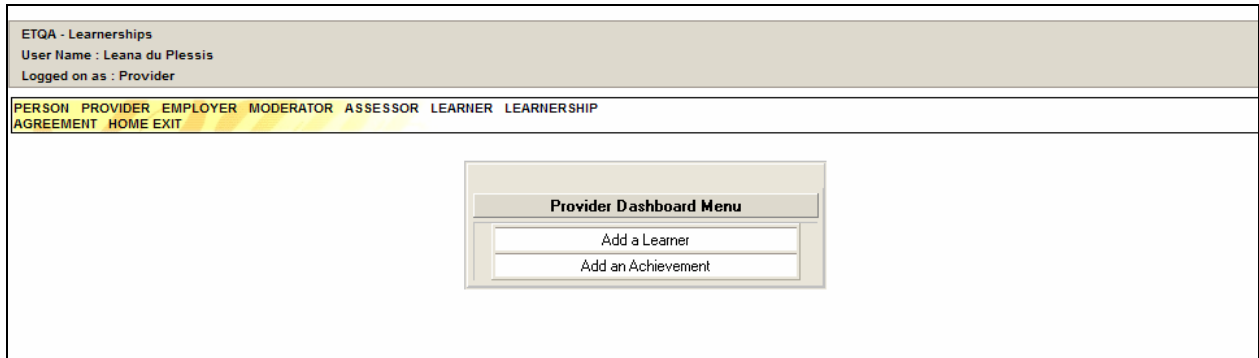
4. Data Management

4.1 Add a Learner



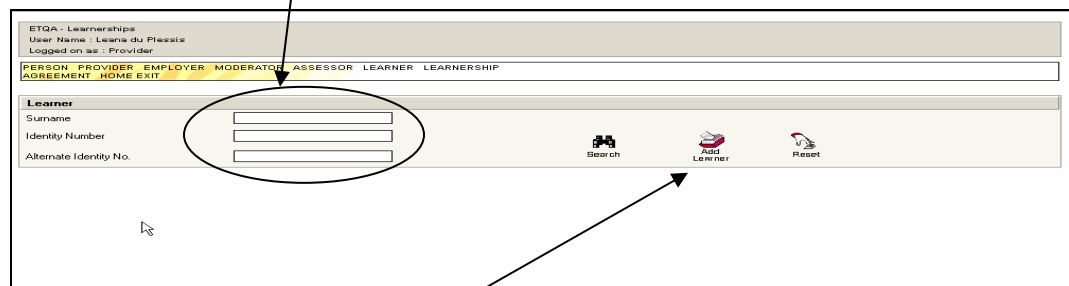
Step 1:

Click on "Add Learner" button from **Provider** Menu Bar



Step 2:

Fill in one of the three fields - Surname, ID or **Alternate ID**



Step 3:

Click on the "Add Learner" button

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Step 4:

Does the **Person Information** exist in the database??

NO – Go to Step 5 on Page XX

YES – Go to Step 7 on Page XX



Note:

The system will determine if the person information of the Learner exists. If it does exist you will only need to complete the three Learner Status fields.

If it does not exist, the system will ask you if you want to add the information.

When you click on the “Yes” button it will bring up the screen where you can add the information. Please see steps 5 and 7 below.



Step 5:

Add the **PERSON** information

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Details		Address	
Title	<input type="text"/>	Socio-Economic Status	<input type="text"/>
First Name	<input type="text"/>	Disability Status	<input type="text"/>
Middle Names	<input type="text"/>	Geographical Area	<input type="text"/>
Surname	<input type="text"/>	Phone No. Business	<input type="text"/> (011) 555-1234
Maiden Name	<input type="text"/>	Phone Number Home	<input type="text"/> (011) 555-1234
Initials	<input type="text"/>	Cell Number	<input type="text"/> 083 555 5555
RSA ID Number	<input type="text"/>	Fax Number	<input type="text"/> (011) 555-1234
Alternate ID Type	<input type="text"/>	Email	<input type="text"/>
Alternate ID Number	<input type="text"/>	Communication Method	<input type="text"/>
Date of Birth	<input type="text"/> dd/mm/ccyy	Person Status	<input type="text"/>
Gender	<input type="text"/>	Status Effective Date	<input type="text"/> dd/mm/ccyy
Equity	<input type="text"/>	Status Reason	<input type="text"/>
Highest Education	<input type="text"/>	Status Comments	<input type="text"/>
Current Occupation	<input type="text"/>	Last Updated Operator	<input type="text"/> Pelsier, Andries
Experience	<input type="text"/>	Record Last Updated	<input type="text"/> 4/8/2003
Years in Occupation	<input type="text"/>		
Nationality	<input type="text"/>		
Citizen Residence Status	<input type="text"/>		
Home Language	<input type="text"/>		



Step 6:

Click on "Add Person" button



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Step 7:

Complete the three **LEARNER** fields

Learner	
Surname	<input type="text" value="du Plessis"/>
Identity Number	<input type="text" value="6810060120082"/>
Alternate Identity No.	<input type="text"/>

Details	Address	Agreements	Achievements	Employer	Registers
Title	<input type="text" value="Mrs"/>				Email <input type="text" value="lduplessis@dtss.co.za"/>
Name	<input type="text" value="Leana"/>				Method of Communication <input type="text" value="E-mail"/>
Surname	<input type="text" value="du Plessis"/>				Date of Birth <input type="text" value="06/10/1968"/>
Maiden Name	<input type="text"/>				Nationality <input type="text" value="South African"/>
RSA Identity No	<input type="text" value="6810060120082"/>				Learner Status <input type="text" value="Enrolled"/>
Citizen Residential Status	<input type="text" value="South African"/>				Status Date <input type="text" value="01/01/2002"/>
Gender	<input type="text" value="Female"/>				Status Reason <input type="text" value="None"/>
Equity	<input type="text" value="White"/>				Status Comments <input type="text"/>
Disability Status	<input type="text" value="(None)"/>				Record Last Updated <input type="text" value="8/4/2003 6:57:58 PM"/>
Home Language	<input type="text" value="Afrikaans"/>				Last Updated Operator <input type="text" value="Pelsier, Andries"/>
Highest Education	<input type="text" value="BCom Information systems"/>				
Business Tel No	<input type="text" value="(012) 482 0364"/>				
Home Tel No	<input type="text"/>				
Fax No	<input type="text"/>				
Cell	<input type="text" value="082 468 1771"/>				



Step 8:

Click on "Add Learner" button



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Note:

The system will now allow the user to access the address, agreements, achievements, employer and provider tabs on the screen.

Address Information

- The system will allow the user to go to the address details. Once again the address details default from the person table. Any updates need to be done on the person (see Updates on personal data later in manual)
- Please note that the **agreements** will only be linked from the agreement function. If an agreement was signed by the learner and registered, the information will appear on the agreement screen and the detail can be viewed from here. (This will be done by the Learnership division)

Add achievements to the learner by clicking on the **Achievements** Tab. A list of all the achievements linked to this learner will appear. To add an additional achievement click on the see the add achievement section. (See later in Manual)

4.2 Add a Unit Standard to a Learner



Step 1:

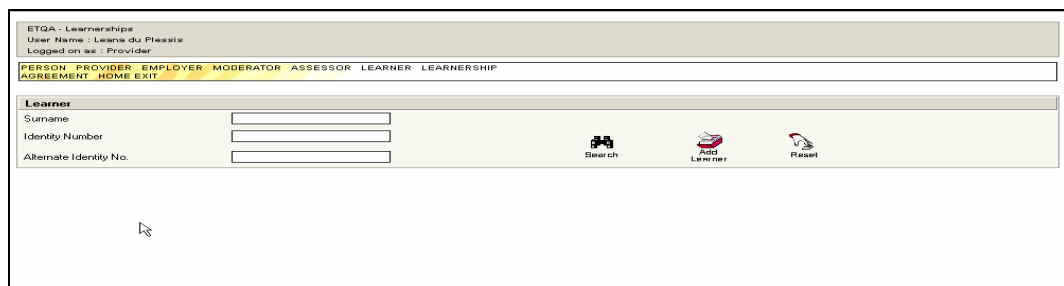
Click on "**LEARNER**" on the menu bar

LEARNER



Step 2:

Search for the LEARNER






ETQA - Learnerships
User Name : Leana du Plessis
Logged on as : Provider

PERSON PROVIDER EMPLOYER MODERATOR ASSESSOR LEARNER LEARNERSHIP
AGREEMENT HOME EXIT

Learner

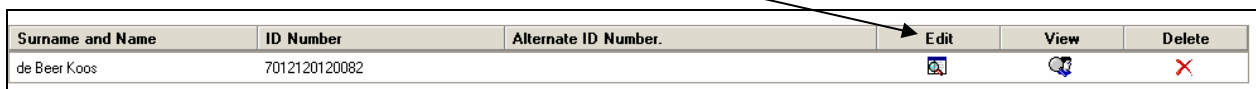
Surname
Identity Number
Alternate Identity No.




 Search  Add Learner  Reset



Step 3:

Click on the "**EDIT**" button



Surname and Name	ID Number	Alternate ID Number.	Edit	View	Delete
de Beer Koos	7012120120082				



Step 4

Click on the "**UNIT STANDARDS**" tab

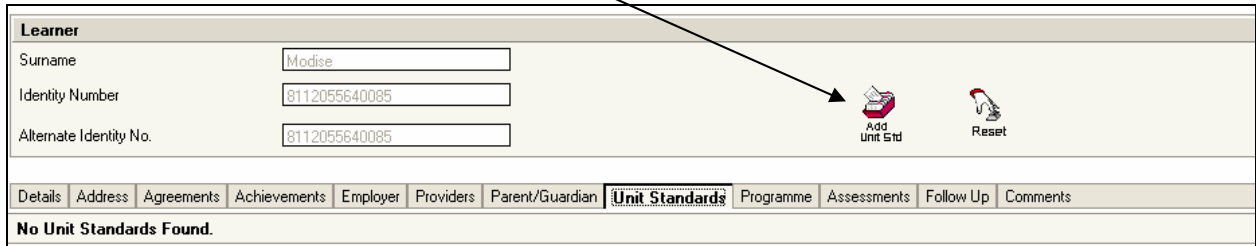
Unit Standards

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Step 5

Click on the **"ADD US"** button



Learner
Surname: Modise
Identity Number: 8112055640085
Alternate Identity No.: 8112055640085

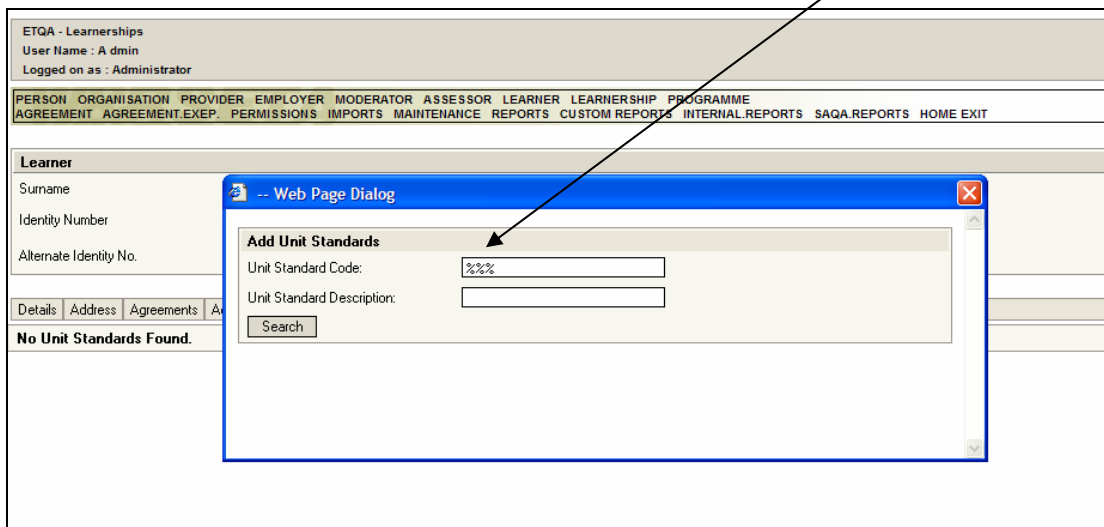
Details | Address | Agreements | Achievements | Employer | Providers | Parent/Guardian | **Unit Standards** | Programme | Assessments | Follow Up | Comments

No Unit Standards Found.



Step 6

Search for the **Unit Standard** with the **Code** or with "%%%"



ETQA - Learnerships
User Name : A dmin
Logged on as : Administrator

PERSON ORGANISATION PROVIDER EMPLOYER MODERATOR ASSESSOR LEARNER LEARNERSHIP PROGRAMME
AGREEMENT AGREEMENT.EXEP. PERMISSIONS IMPORTS MAINTENANCE REPORTS CUSTOM REPORTS INTERNAL.REPORTS SAQA.REPORTS HOME EXIT

Learner
Surname: Modise
Identity Number: 8112055640085
Alternate Identity No.: 8112055640085

Details | Address | Agreements | **Unit Standards** | Programme | Assessments | Follow Up | Comments

No Unit Standards Found.

Add Unit Standards
Unit Standard Code: %%%
Unit Standard Description:
Search



Notes:

- Only the Unit Standards that are part of the scope of the Provider will appear in the result of the search.
- It is easier to add the unit standard when you know the SAQA Unit Standard code.

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Step 7

Click in the tick box to select the unit standard



Step 8

Click on the **"ADD"** button to add the Unit Standard to the **LEARNER**

4.3 Add a Learning Programme to a Learner



Step 1

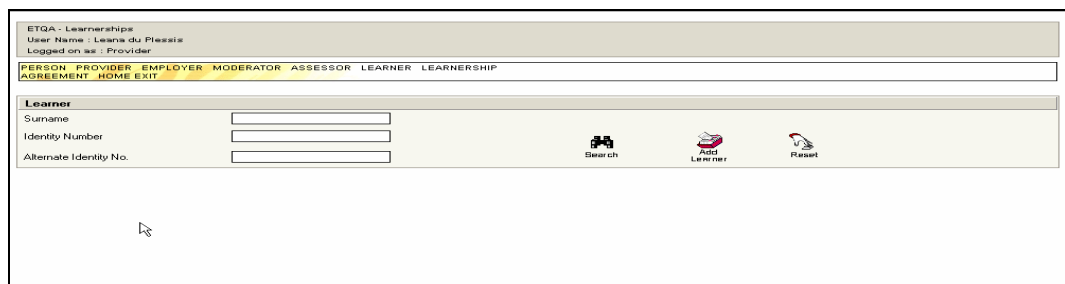
Click on **"LEARNER"** on the menu bar

LEARNER



Step 2:

Search for the LEARNER



ETQA - Learnerships
User Name : Leana du Plessis
Logged on as : Provider




PERSON PROVIDER EMPLOYER MODERATOR ASSESSOR LEARNER LEARNERSHIP
AGREEMENT HOME EXIT

Learner

Surname

Identity Number

Alternate Identity No.

 Search  Add Learner  Reset

Criteria & Guidelines: Database Support for Providers



Step 3:

Click on the **"EDIT"** button

Surname and Name	ID Number	Alternate ID Number.	Edit	View	Delete
de Beer Koos	7012120120082				



Step 4:

Click on the **"PROGRAMME"** tab

ETQA - Learnerships
User Name : A dmin
Logged on as : Administrator

PERSON ORGANISATION PROVIDER EMPLOYER MODERATOR ASSESSOR LEARNER LEARNERSHIP PROGRAMME
AGREEMENT AGREEMENT.EXEP. PERMISSIONS IMPORTS MAINTENANCE REPORTS CUSTOM REPORTS INTERNAL.REPORTS SAQA.REPORTS HOME EXIT

Learner

Surname

Identity Number

Alternate Identity No.

Details | Address | Agreements | Achievements | Employer | Providers | Parent/Guardian | Unit Standards | **Programme** | Assessments | Follow Up | Comments

No Programme Found.



Step 5:

Click on the **"ADD LP"** button



Step 6:

Search for the Learning Programme with the Code or with "%%%"



Step 7:

Click on the "**ADD**" button to add the Learning Programme to the **LEARNER**



Notes:

Only the Learning Programme that has been approved by the ETQA will appear on the system.

4.4 Add Assessments to a Learner



Step 1:

Click on the "**LEARNER**" button from the Menu Bar

LEARNER

Criteria & Guidelines: Database Support for Providers



Step 2:

Search for the LEARNER



Step 3:

Click on the **EDIT** button

Surname and Name	ID Number	Alternate ID Number.	Edit	View	Delete
de Beer Koos	7012120120082				



Step 4:

Click on the **ASSESSMENTS** tab

Assessments

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Step 5:

Select an **ASSESSOR** from the dropdown box next to the relevant Unit Standard

ETQA - Learnerships
User Name : Ad Min
Logged on as : Administrator

PERSON ORGANISATION PROVIDER EMPLOYER MODERATOR ASSESSOR LEARNER LEARNERSHIP
AGREEMENT AGREEMENT.EXEP. PERMISSIONS IMPORTS MAINTENANCE REPORTS INTERNAL.REPORTS HOME EXIT

Learner
Surname:
Identity Number:
Alternate Identity No.:


Details | Address | Agreements | Achievements | Employer | Providers | Parent/Guardian | Unit Standards | LP | **Assessments**

Qualifications
Qualification name: Required Credits:

US Code	US Description	Credits	Assessor	Moderator	Assessment Date
7234	Conduct an analysis of a personal	0	<input type="text"/>	<input type="text"/>	dd/mm/ccyy
7231	Establish a personal banking custo	0	<input type="text"/>	<input type="text"/>	dd/mm/ccyy

Learning Programmes
No Learning Programmes

Unit Standards
No Unit Standards



Step 6:

Select a **MODERATOR** from the dropdown box



Step 7:

Complete the **Assessment Date**

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Step 8:

Click on the "**UPDATE**" button



Notes:

NOTE 1: The ASSESSOR **field** is a compulsory field. The system will not accept the update of the achievement if there is no assessor.

NOTE 2: Only the ASSESSORS linked to the Provider and where the Unit Standard is part of their **scope** will appear in the dropdown box

NOTE 3: The MODERATOR field is not a compulsory field, as only a sample of 10% needs to be moderated as per ETQA requirements.

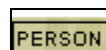
NOTE 4: The ASSESSMENT DATE field is a compulsory field.

4.5 Update personal details of a Learner




Step 1:

Click on "PERSON" on the menu bar



Step 2:




Search for the PERSON

Person	
Surname	<input type="text" value="de Beer"/>
ID Number	<input type="text"/>
Alternate ID Number	<input type="text"/>
 Search	



Step 3:

Click on the "EDIT" button

Surname and Name	ID Number	Alternate ID Number.	Edit	View	Delete
de Beer Koos	7012120120082				



Step 4:

Update the relevant information

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Step 5:

Click on the **"UPDATE PERSON"** button



Note 1:

It is important to know that all changes will be captured in the **audit trail**. Detail of the last update on the information can be seen at the bottom of the person screen.

Record Last Updated	29/01/2004 7:50:13 AM	
Last Updated Operator	Min, Ad	



Note 2:

You can only update PERSONAL details of the LEARNER on the PERSON page, for example, address information or contact details.

To edit details regarding the learner status for example, you need to go [to](#) the LEARNER and edit the details there.

4.6 View the Scope of the Assessor



Step 1:




Click on "ASSESSOR / MODERATOR" on the menu bar

MODERATOR ASSESSOR



Step 2:




Search for the ASSESSOR / MODERATOR

Assessor	
Surname	<input type="text"/>
ID Number	<input type="text"/>
Alternate ID Number	<input type="text"/>
Assessor Registration No	<input type="text"/>
	 Search  Add Assessor  Reset



Step 3:

Click on the **VIEW** button

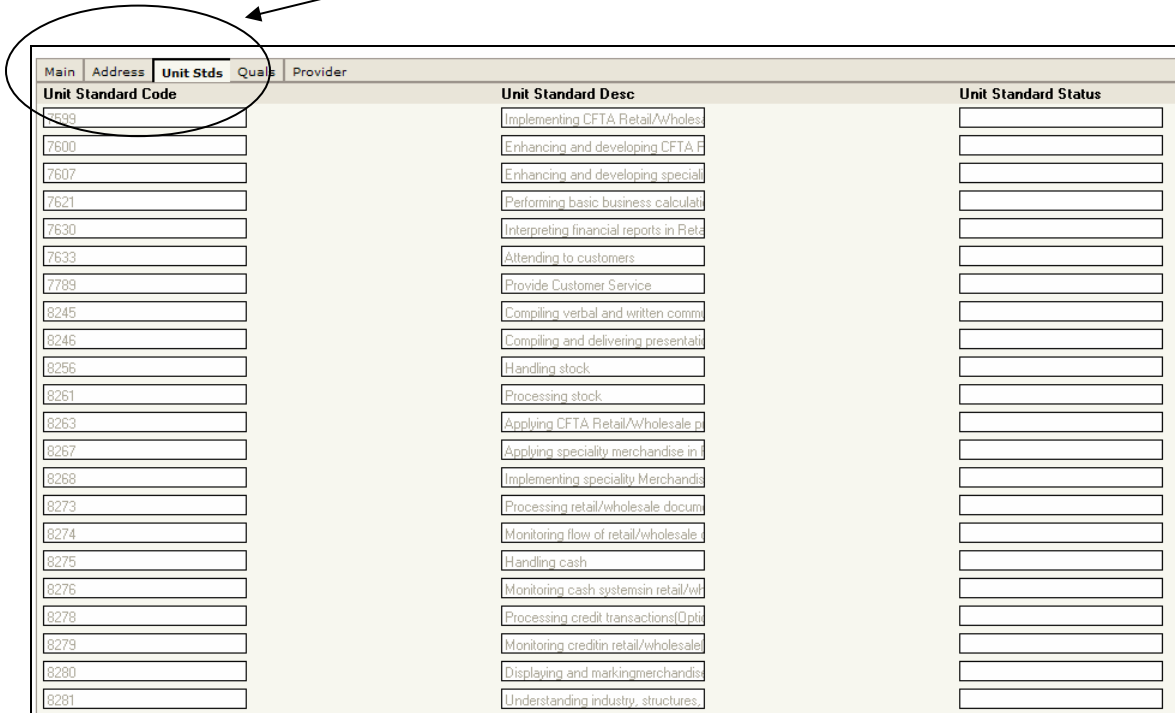
Surname and Name	ID Number	Alternate ID Number	Assessor Registration No	Edit	View	Delete
Waugh Chris	4503305018086		617/ASS/00002/04			

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Step 4:

Click on the **"UNIT STANDARDS / QUALIFICATION"** tab to view the scope



Main	Address	Unit Stds	Quals	Provider	Unit Standard Code	Unit Standard Desc	Unit Standard Status
					7599	Implementing CFTA Retail/Wholes	
					7600	Enhancing and developing CFTA B	
					7607	Enhancing and developing special	
					7621	Performing basic business calculati	
					7630	Interpreting financial reports in Ret	
					7633	Attending to customers	
					7789	Provide Customer Service	
					8245	Compiling verbal and written commi	
					8246	Compiling and delivering presentati	
					8256	Handling stock	
					8261	Processing stock	
					8263	Applying CFTA Retail/Wholesale p	
					8267	Applying speciality merchandise in	
					8268	Implementing speciality Merchandis	
					8273	Processing retail/wholesale docum	
					8274	Monitoring flow of retail/wholesale	
					8275	Handling cash	
					8276	Monitoring cash systemsin retail/wf	
					8278	Processing credit transactions(Ophi	
					8279	Monitoring creditin retail/wholesale	
					8280	Displaying and markingmerchandis	
					8281	Understanding industry structures	



Notes:

The scope of the Assessor is the Unit Standards that the Assessor is either competent in or has the technical competencies


4.7 Search Function



Step 1:

To do a search you need to fill in one of the three fields

Person	
Surname	<input type="text" value="de Beer"/>
ID Number	<input type="text"/>
Alternate ID Number	<input type="text"/>

 Search



Step 2:

Click on the "SEARCH" button



Notes:

To do a **generic search** to get a list of all the specific data, enter three percentage signs (%%%) in the search field.

4.8 Printing of Reports



Step 1:

Click on Custom Reports

CUSTOM REPORTS



Step 2:

Click on the report that you want to download

Customised Reports	
Provider	
Assessors	Provider with list of assessors
Assessors Scope (Qual)	Provider with list of assessors and assessor scope (Qualifications)
Assessors Scope (US)	Provider with list of assessors and assessor scope (Unit Standards)
Moderators	Provider with list of moderators
Qualifications	Provider with all linked Qualifications
Skills Programmes	Provider with all Skills Programmes that they can train
Unit Standards	Provider with all linked Unit standards




Step 3:

Click on the Excel icon

Excel CSV Report

Your Excel Document is ready. Click on the link below to download the Document.

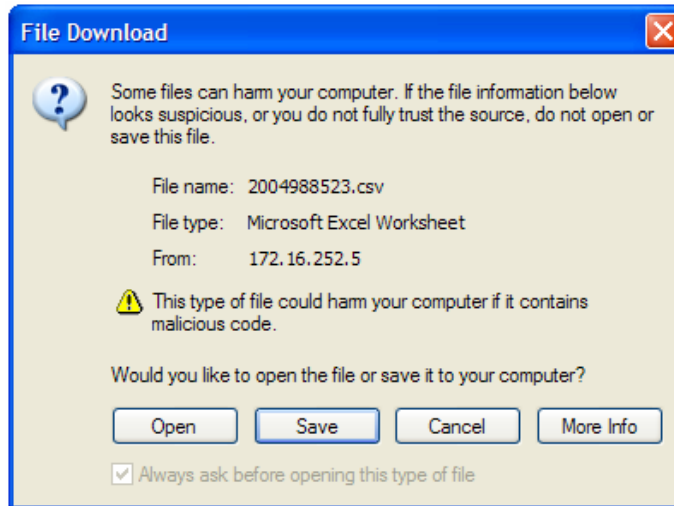
 a,

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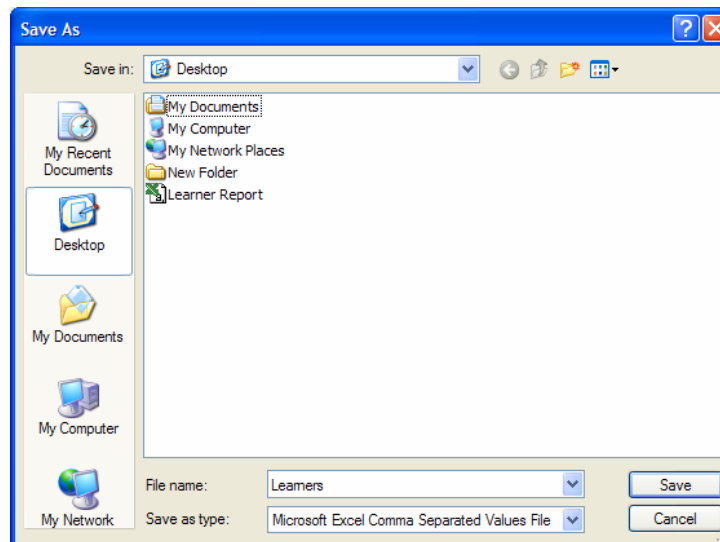
Step 4:

Click on the “SAVE” button



Step 5:

Select the place where you want to save this report in the “Save in” dropdown box.

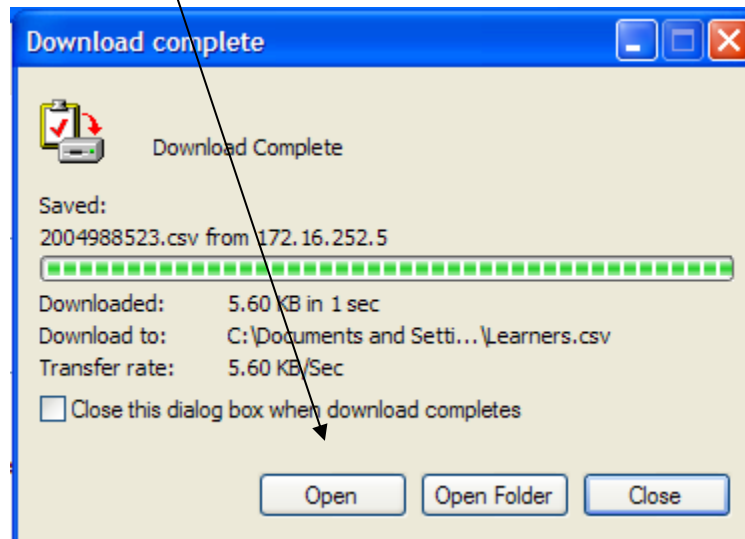


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Step 6:

Click on the “OPEN” button



Notes:

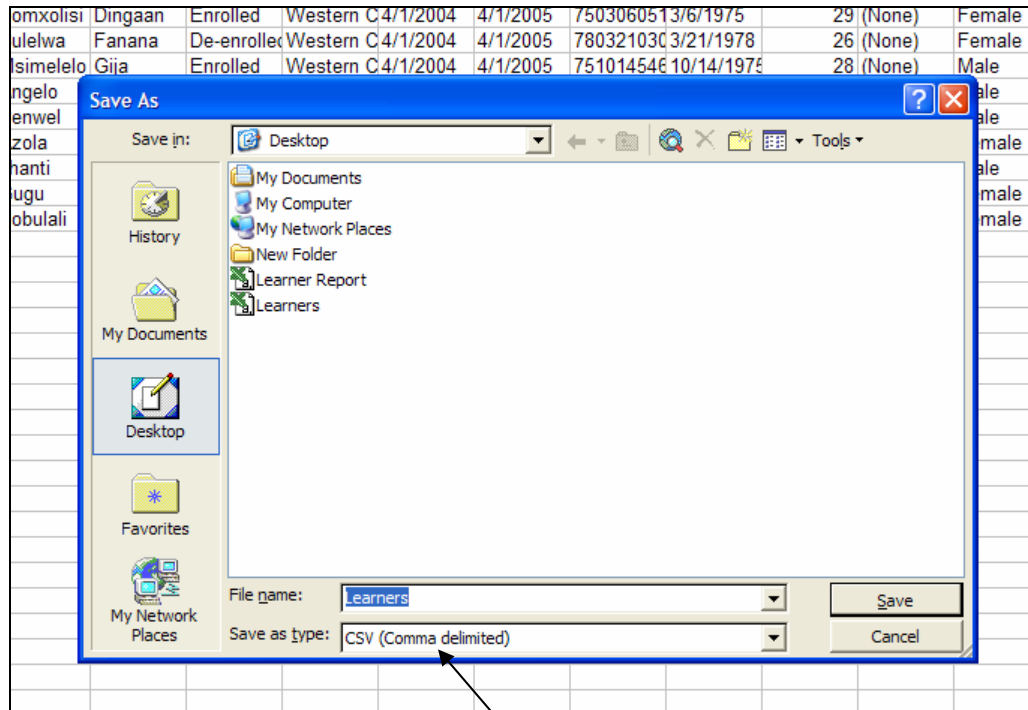
The file is going to open in Excel but the format is CSV.

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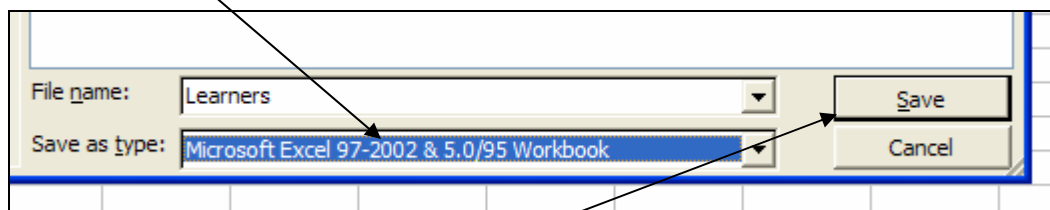
Step 7:

Click on “File”, then click on “Save As”. The next “Save As” box will appear like in the picture below



Step 8.1:

Change the “Save as type:” from “CSV (Comma delimited)” to “Microsoft Excel 97 – 2002 & 5.0/95 Workbook”



Step 8.2:

Click on the “Save” button

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Step 9:

Delete the two (2) blank rows at the top of the spreadsheet by highlighting the rows, right click, and select “Delete” from the menu that pops up.



Step 10.1:

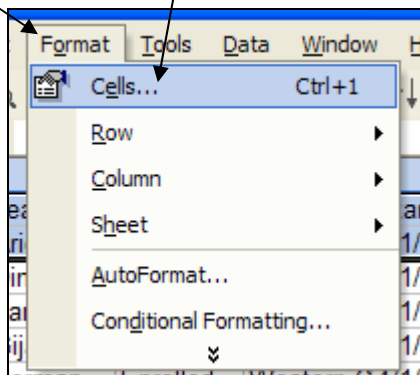
Change the format of the “Learner ID” column

A
Learner ID
8.01E+12
7.5E+12
7.8E+12
7.51E+12
8.5E+12
7.91E+12



Step 10.2:

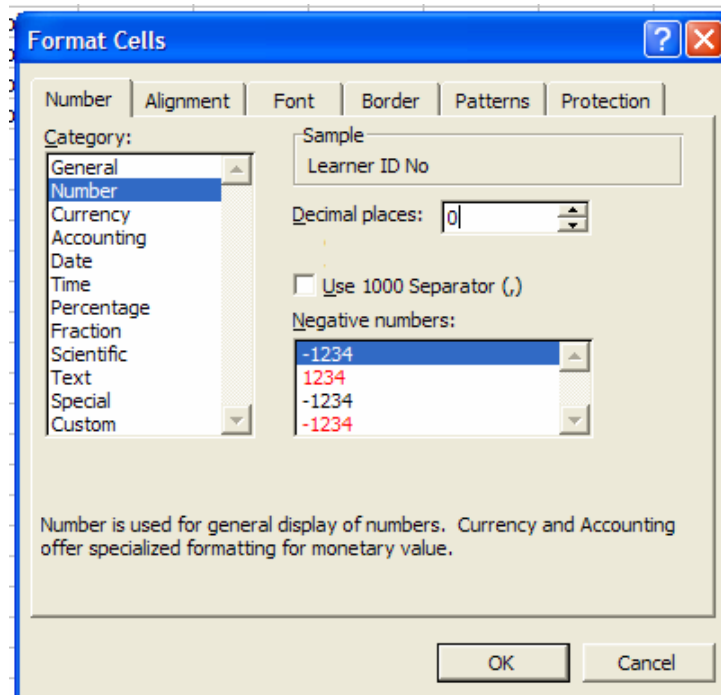
Click on the “A” at the top of the column to select the whole column. Click on “Format” then click on “Cells”





Step 11:

Select the “Number” tab. Select “Number” in the “Category” box. Change the “Decimal places” to “0”. Click on the “OK” button. This will change the ID number into the correct format.

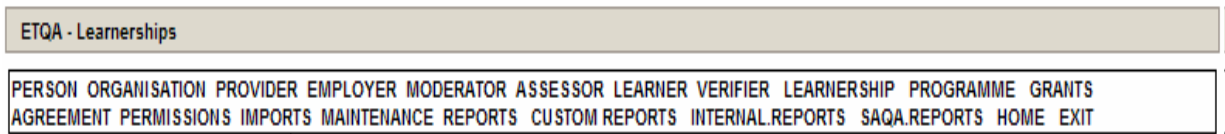


5. Learner Import



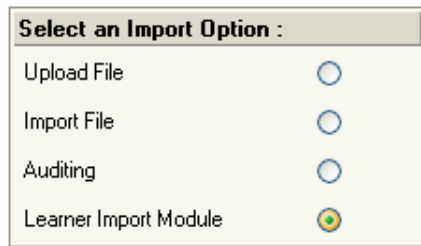
Notes:

This option is used for mass uploads /imports into the THETA ETQA system



Step 1:

Click on "**Imports**"



Step 2:

Select "**Learner Import Module**"

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Notes:

Figure 1 Learner Import Module

You will be presented with the screen depicted in Figure 1.2 after clicking on this new menu item. Three choices are available:

- *Export Data*: Populate the MS Access application with the latest lookup data from the ETQA module. Once populated, a hyperlink will be made available to the user so that the application may be downloaded.
- *Upload File*: Upload an MS Access file to the server for processing.
- *Import Data*: Import an uploaded file into the system or view files that have already been imported.

Select an Option :	
Export Data	<input type="radio"/>
Upload File	<input type="radio"/>
Import Data	<input type="radio"/>



Notes:

Figure 2 : Import Menu Items

Export Data

The following tables will be exported:

- Citizen Status
- Communication Method
- Disability Status
- Equity
- Gender
- Home Language
- Learner Status
- Learner Status Reason
- Providers
- Nationality
- Region
- Socio Economic Status
- Title

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After populating the application, you may download the file and take it offline to capture the required learners. Please note: Only Providers with a status of *Accredited* or *Accredited – Provisional* will be exported.



Step 3: Upload File

Upload the application once capturing has been completed. Figure 1.3 portrays the File Upload functionality

The screenshot shows a dialog box titled "File Upload:". It contains the text "Please Select a file to upload:". Below this is a text input field containing the file path "C:\Learner_THETA.mdb" and a "Browse..." button to its right. At the bottom of the dialog is an "Upload File" button.



Notes:

Figure 3 File Upload

Import Data

The Import Data screen will allow you to import a file that has been uploaded or to view files that have already been imported into the system. A file may not be imported more than once.

The screenshot shows a dialog box titled "Data Import:". It contains the text "Please Select a file to import:". Below this is a list box containing the file name "Learner_THETA.mdb". Underneath the list box are two input fields: "Uploaded By" with the value "Ad, Min" and "Date Uploaded" with the value "04 March 2005 17:05:26". Below these is an "Import Data" button. Further down, it says "The following files have already been imported: (Click on the file to view it's details)". Below this is another list box containing the file name "Learner_THETA_UMH017_2802C". At the bottom are two more input fields: "Imported By" with the value "Ad, Min" and "Date Imported" with the value "04 March 2005 17:12:45".

6. Glossary of Terms



Notes:

Terminology used in this Criteria & Guideline document must be interpreted within the specific context that it is written and intended in.

The list of terms defined below defines the context of its use within this document.

1. **Achievements:**

An achievement is when a student has been found competent in a Qualification or set of Unit Standards

2. **Add US:**

“Add US” refers to linking a single Unit Standard to a Learner.

3. **Agreements:**

The Agreement on the system is the Learnership Agreement that the Learnership Department of THETA captured on the system. The Learnership, Learner details, Commencement Date and End Date get captured in the Agreement. The Agreement also gets linked to the Provider and the Employer so you will be able to see the Agreements linked to you as a Provider.

4. **Alternate ID:**

The Alternate ID is an Identity Document other than the RSA Identity Document, for example a Student Number or a Drivers Licence Number.

5. **Assessments:**

Assessments are the assessment that is being done by an Assessor.

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6. **Assessment Date:**

Assessment Date is the date on which the assessment for a specific Unit Standard took place.

7. **Assessor:**

The Assessor is the person with the necessary competencies who assesses Unit Standards.

8. **Audit Trail:**

Audit Trail is a tool in the system that we use to track changes that has been made by individuals. With the Audit Trail we will be able to see who did what changes where and when.

9. **Code:**

This code refers to the SAQA Unit Standard Code. It is easier to use this code when linking Unit Standards to a learner that is only doing a Unit Standard. The reason why we are using SAQA's codes is because we need to upload this information of the learners onto the NLRD.

10. **Edit:**

To "Edit" something is to make changes to records on the database. For example Learner contact details, or status changes. Very important to remember is that all the changes get recorded in the database for future reference.

11. **ETQA/Lship:**

The system consists of two parts, the Skills system and the ETQA/Learnership system. To logon to the ETQA System you need to select the ETQA/Lship option from the dropdown box when you log in with your username and password.

12. **Field:**

Field refers to the dropdown boxes or the spaces where you can capture any data in.

13. Generic Search:

A Generic Search refers to a general search, in other words, when you are looking for a list of the learners in your system you can use “%%” and then the system will give you all the learners link to your profile, or when you use “a%%” the system is going to give you all the learners who’s surname starts with an “A”. When you search you need to use a minimum of 3 characters.

14. Learner

A Learner in the system is a Person who is enrolled in a Learnership, a Unit Standard of a Learning Programme.

15. Learning Programme

A Learning Programme is not a full Qualification but a Programme with only a few Unit Standards.

16. LP

LP refers to a Learning Programme.

17. Moderator

The Moderator is the person with the necessary competencies to moderate the assessments of Unit Standards.

18. Person

A Person in the system is somebody without a Learner-, Assessor-, or Moderator Status. The information on Person is personal information and information that need to be uploaded to the NLRD e.g. gender, equity, contact numbers and address. If you need to do any changes on personal information for example a contact number that changed, you will search for the learner under Person and make the necessary changes.

19. Provider

A Provider in the system is an organisation that has been Fully- or Provisionally Accredited by THETA to provide training. It is important to know that you can only access your information once it has been uploaded on the system by THETA.

20. Qualification

A Qualification refers to the Qualifications that are registered at SAQA .

21. Scope

The Scope of the Assessor/Provider is the Unit Standards that the Assessor/Provider is either competent in or has the technical competencies to provide training in.

22. Scope of an Assessor

The scope of the Assessor is the Unit Standards that the Assessor is either competent in or has the technical competencies.

23. Search

Search is a function available in the system that one can use when you need to find a specific Learner/Assessor/Moderator.

24. Stakeholder

Stakeholder refers to THETA's Stakeholders.

25. Unit Standard to a Learner

To add a Unit Standard to a Learner refers to linking a single Unit Standard to the Learner. In other words, the learner is only doing a single Unit Standard and not a Qualification or Learning Programme.

26. Unit Standard

Unit Standard refers to the Unit Standards registered at SAQA

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27. Update

Update refers to saving information that changed in the system. For Example if you changed the contact details of a learner, you are going to click on the “Update Person” button to save the change that you have made to the details.

28. View

To “View” means that you won’t be able to make any changes to the information, but you will see the information.