



UIF Management System Functionality

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Introduction

This document details current system functionality and proposed future system functionality of an online management system designed specifically to simplify the tasks of Management Companies participating in the UIF Project

This system is located at www.UIFManagement.co.za

The system is currently structured in a Management Company / Employer / Branch environment where, per client:

- A single Management Company exists
 - Structured to hold all management capabilities for all Employers associated to the Management Company as well as all reporting facilities
- Multiple Employers can exist within a single Management Company
 - Structured to hold all management capabilities for each specific employer as well as some reporting facilities
- Multiple Branches can exist within a single Host Employer
 - These are, essentially, "Places Of Work" and hold no management capabilities or reporting facilities

Current Functionality

System User & Logon Management

System users are people within the Management Company / Employer that can logon to the UIF Project Management System with clear rights and actions that they can perform

We, currently, have several System User Types. These are:

- Management Company Administrator
- Management Company Manager
- Management Company Employee
- Employer Administrator
- Employer Manager
- Employer Employee

System view & management rights are described, per System User Type, in detail, below



When a system user is created (By capturing their information), they are sent an email with logon instructions as well as a temporary, one time, password to use. Passwords must be changed before any information can be seen

System users can be created by either:

- The support team at UIFManagement.co.za
- A Management Company Administrator OR
- A Employer Administrator

Management Company Administration

Management Companies are administered by the team at UIFManagement.co.za

However, once a Management Company has been created and a Management Company Administrator has been added to it, that Management Company Administrator can take over the creation of Employers, Branches and other System Users within their associated Management Company

Employer / Branch Management

An unlimited number of Employers & Branches can be added per Management Company with Branches housing the physical location of work to be done

Employers & Branches can be created by any Management Company Administrators for the Management Company that they are associated to

Employers can be marked as running their own payroll or utilising the Management Companies payroll (This requires Banking Details to be captured if utilising the Management Companies Payroll)

Management Company Batch Management

Batches are seen as a holding bucket for candidates / employees. These contain start dates and a maximum numbers of candidates / employees

Management Company Administrators can create an unlimited number of batches

Candidates / Employees are added to Batches in order to provide management to smaller groups



Data Acquisition Process

Data acquisition is managed in 3 separate phases. These are:

Initial Data Acquisition (Candidate Data)

This process acquires initial information about the candidate to be placed on a Batch (Name, ID Number, Cell Number, Home Address, etc)

This information is captured, manually, per Candidate, on the system

Documents required to be uploaded:

- Certified Copy Of Candidates ID Book
- Copy Of Candidates CV
- Candidates Unemployment Affidavit

Candidate Documents can be added both during the capture of Candidate Data or after the fact (The system will prompt you to upload documents still required)

An unlimited number of Candidates can be added to any Employer at any Management Company

Acquire Candidate Data From ESSA

This depends entirely on your Agreement & MOU with the UIF, but we have found that most Management Companies are required to acquire Candidates from the Department of Employment & Labour's ESSA system

If you have not done so already, you will need to register on ESSA, link your Organisation to your profile utilising your UIF Registration Number, post opportunities on ESSA and received Candidate CV's in response back from ESSA

This process does not appear to be a real time one and it may take some time to receive Candidate CV's back from the ESSA System

ESSA can be found at

<https://essa.labour.gov.za/EssaOnline/WebBeans/>

Data Confirmation By The UIF

Once the batch has been fulfilled (Max number achieved), the batch data, including all documents, can be exported to excel for submission to the UIF for approval

Once approval has been acquired from the UIF, Employees are created by finding the Candidate on System and converting their existing data to an Employee by adding additional information and uploading additional documents

Extended Data Acquisition (Employee Data)

Once the Employee has been UIF Approved, the following data can be appended to the Candidate record to create an Employee:

- Date Employed
 - Date To Be Terminated is auto factored as 1 year from the date employed or the end date of the Batch, whichever is earlier
- Amount of Monthly Stipend to be paid (Preset, but can be changed)
- Amount of Monthly Employers top up (If any)
- If the Management Company runs the payroll for an Employer:
 - Name of Bank + Bank Account details

Documents required:

- Signed Contract Of Employment
- Signed EEA1 Form
- Employees Funding Agreement
- If the Management Company runs the payroll for a specific Employer:
 - Stamped copy of latest statement
- Documents can only be added when capturing Employee Data

This sets up the monthly process and will prompt the Management Company to upload specific documents to a monthly schedule

An unlimited number of Employees can be added to any Employer at any Management Company



Monthly Document Acquisition & Management

Once an Employee is created, the system automatically starts a monthly document management process for each of the current Employees within each Management Company. These documents are:

- Monthly Timesheets
 - Required to be uploaded between 20th and 25th of the month for that month
- Monthly Proof Of Payments & Pay Slips
 - Required to be uploaded between 1st and 5th of the month for the prior month

This Monthly Document Acquisition process will prompt specified users within Management Companies and Employers that these documents are required (On a per Employee basis)

An exception report is provided, detailing all outstanding documents, on a per Employee basis

Monthly Employee Management

Terminations / Replacements

Employees on a batch can be terminated if they no longer work for the Employer. Dates and termination reasons are required

Terminated Employees can be replaced on the Batch if more than 1 month is time still available on the batch for that Terminated Employee (They can be replaced for the time they have left on the Batch)

Leave

Leave can be managed on a per Employee basis. Leave is factored into your "Claim Amount" for each specific Employee for each specific month, utilising the following leave types:

- Annual
- Sick
- Maternity / Paternity
- Family / Bereavement
- Religious



- Other (And Describe)

Leave is managed, monthly during the upload of Timesheets and is utilised in monthly "Claim Amounts"

Managing Terminations & Replacements

If a Employee, on a Batch, is terminated (For whatever reason) and that Employee has more than a month still available on the Batch (Using Start and End Dates), that Initial Employee can be replaced for the duration of time still available on that Batch (Based on time available from the terminated Employee)

These Replacement Employees can be selected from your existing list of Candidates without going through the UIF Approvals process

The system utilises an internal numbering system to detail initial Employees and Employees that have replace initial Employees within Batches

A specific area on the System is provided for Replacements

Monthly Reporting & Quarterly Claims

Reporting & Claims

Monthly Reporting & Quarterly Claims follows exactly the same format

At the start of every working day a report is auto generated (and exported to excel) for each Batch, containing every Employee on that Batch (Active, Terminated or Replaced) and detailing monthly claim amounts per employee as well as providing links to each months supporting documents. This is a month by month detail, per employee on the batch, on a single spreadsheet

Documents are provided as clickable links within the spreadsheet, with a further link provided for a list of all documents associated to an Employee

These documents are retained and detailed on the system, within each batch

Who To Pay Report

If the Management Company runs the payroll for a specific Employer, a pay report is generated at month end, detailing Who, Which bank account, What amount and for What month. This is done at a Management Company level

System User Types / Roles & Their Rights

We, currently manage 6 different System User Types. These are the roles that people from within your organisation can be assigned on the system

As roles are assigned rights on the system, your access to view or manage information contained on the system is detailed by the rights associated to your associated System User Type.

- **Management Company Administrator**
 - Can view and manage (Created, Edit or Deactivate) all information within their associated Management Company
 - An unlimited number of Management Company Administrators can be added to any Management Company
- **Management Company Manager**
 - Can view all the information within their associated Management Company
 - Can manage some information (Created, Edit or Deactivate)
 - This is, essentially, a report viewing roles
 - An unlimited number of Management Company Managers can be added to any Management Company
- **Management Company Employee**
 - Can only view some of the information within their associated Management Company
 - This role is designed to manage the creation of Candidates & Employees as well as uploading of monthly information for Employees on Batches
 - An unlimited number of Management Company Employees can be added to Management Companies
- **Employer Administrator**
 - Can view and manage (Created, Edit or Deactivate) all information within their associated Employer
 - An unlimited number of Employer Administrators can be added to any Employer
- **Employer Manager**
 - Can view all the information within their associated Employer
 - Can manage some information (Create, Edit, Deactivate)
 - This is, essentially, a report viewing roles
 - An unlimited number of Employer Managers can be added to any Employer



- **Employer Employee**
 - Can only view some of the information within their associated Employer
 - This role is designed to manage the creation of Candidates & Employees as well as uploading of monthly information for Employees on Batches
 - An unlimited number of Employer Employees can be added to Employers

Integration With Other Systems

The system can be integrated with existing HR Systems, utilising well known API / Server-to-Server interaction methodologies. As each integration is different to the next, costings are based on the actual work to be executed for each integration

We can integrate most elements of the System to your existing HR Management systems (and vice-versa), as required

If you have an integration requirement, please get in touch with the team at UIFManagement.co.za

System Training & Support

Training

Online, instructor led training is provided over Microsoft Teams to a monthly schedule. Training can be specifically scheduled for your entire Management Company once you have signed up for the service

We typically also run a question and answer session over Microsoft Teams on a monthly basis

Please get in touch with the team at UIFManagement.co.za if you would like to schedule any training for your team or join in on the next Q&A Session



Support & Service Level Agreement

A Support SLA is attached to this service, based on response times and mean time to repair times. These are centered on Issue Levels and the definitions associated with those levels.

High Priority: The issue renders the UIFManager Application COMPLETELY unusable and has no workaround, or causes loss/corruption of stored data

- Response Time: Under 4 working hours
- Mean Time To Repair: Under 8 working hours, but all efforts extended to resolve as fast as is humanly possible

Moderate Priority: Not High Priority, but does have significant impact / is important as defined by the Management Company

- Response Time: Under 6 working hours
- Mean Time To Repair: Under 16 working hours

Low Priority: Have isolated impact and may have workarounds. Most issues are considered low

- Response Time: Under 8 working hours
- Mean Time To Repair: Communicated at response time after an investigation into the issue

Working hours are described and 8am to 5pm on any standard South African work day, excluding Saturdays, Sundays & recognised Public Holidays

Support can be requested by sending a detailed email to

support@UIFManagement.co.za

Please understand that spurious or repeated support calls logged may incur an additional charge



If Things Go Badly Wrong

We all have these. It's the nature of technology. Things can go very badly wrong

This is not about stopping these things from going very badly wrong, this is about how we manage things when they do

If something has gone very badly wrong, simple get hold of us and invoke the "Things Have Gone Badly Wrong" process

Invoking this process will galvanise the team to drop everything and help you until **things** are not going very badly wrong any more. Even at 2am on a Sunday morning on Christmas day. Whatever it takes

But, beware..... If you invoke this process and things have not gone very badly wrong from a technology perspective, we will bill you R 5 000 per hour (or part) per person we've galvanised to solve your exceptionally serious problem. You could end up paying us R 20 000 for 90 seconds worth of work because you thought not understanding how to do something was "Things Have Gone Badly Wrong"

As a side note, we only allow specific, named personnel within Management Companies to invoke the "Things Have Gone Badly Wrong" process



Possible Future Functionality

Please understand that while we are currently thinking about this additional functionality, there is a possibility that, due to several reasons, we may not actually release any of the elements described below. This is simply a list of elements we would like to add to our system over time. There are no guarantees we will implement any of this possible future functionality

Auto Creation Of Candidates From Excel Uploads

We are currently investigating the auto creation of Candidates from an uploaded excel spreadsheet. This is a relatively challenging technology process as the spreadsheet needs to be in a very specific format, with columns in expected locations and data presented in a very specific way (EG: Think of how excel deals with a 0 at the start of a cell phone number, etc)

As the system is currently set up to manage Candidates and their Document Uploads separately, this presents no issues

Auto Creation Of Employees From Excel Uploads

We are currently investigating the auto creation of Employees from an uploaded excel spreadsheet. This is an exceptionally challenging process as the spreadsheet needs to be in a very specific format, with columns in expected locations

As the system is currently set up to manage Candidates and their Document Uploads simultaneously, this will result in a system wide change regarding the management of Employees initial information

Information Pushed To The UIF

At the moment, any information required by the UIF is extracted to excel, from the System, by the Management Company and presented to the UIF by the Management Company in terms of their agreement with the UIF

It makes sense that we should investigate a simpler, cleaner and clearer technology level integration with the UIF. So we will

This is something we will investigate later in 2024, but we are aware that most government departments are wary of technology changes presented from outside of their organisation, this process might not actually happen



Conclusion

Please get in touch with the team at UIFManagement.co.za if you would like any further information on the online management system designed specifically to simplify the tasks of Management Companies participating in the UIF Project

