

Tax Technician Qualification

Accreditation Application as Provider

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1. Introduction

All Knowledge, Practical Skills and Workplace Experience Training Providers seeking accreditation with SAIT must complete this Application Document and submit all the required documentation as stated.

This document should be read with the Tax Technician Qualification: Accreditation Policy and Procedures.

A site visit will be conducted as part of the approval process for new accreditation applications, followed by periodic site monitoring visits. Please refer:

- Annexure A: Site Visit Checklist for New Applications
- Annexure B: Checklist for Monitoring Site Visits.

2. Instructions

Applications must be complete to enable SAIT to proceed with the accreditation process. To assist with this, if you have queries regarding the application, please contact Caretha Laubscher, SAIT Head of Education and Standards at claubscher@thesait.org.za.

Guidelines for completion of Accreditation Application:

- All applicants must complete Section A.
- Applicants applying to become accredited as a Knowledge Provider must complete Section B.
- Applicants applying to become accredited as a Practical Skills Provider must complete Section C.
- Applicants applying to become approved as a Workplace Experience Provider must complete Section D.
- The head of training or the head of the business unit or department responsible for the Tax Professional Learnership has to complete sign Section E.

Please ensure that all the relevant sections are completed and necessary documentation as requested attached. Return application to Caretha Laubscher, SAIT Head of Education and Standards. .

3. Type of Application

	Mark	Complete the following Sections
Organisational Information		Section A
Knowledge Competency Provider		Section B
Practical Skills Provider		Section C
Workplace Experience Provider		Section D
Training Officer Authentication		Section E

4. Administration Fee Structure

Application and Accreditation Fees	Mark
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Knowledge Competency Providers are accredited by QCTO

Practical Skills Provider are accredited by QCTO

Workplace Experience Provider	R5 500	
Practical Skills and Workplace Experience RPL Exemption Application (Assess POE & Logbook)	R3 250	Per Learner

Monitoring Fees	Mark
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Knowledge Competency Provider monitored by QCTO n.a.

Practical Skills Provider monitored by QCTO n.a.

Workplace Experience Provider Monitoring – every 3 years R5 550

Workplace Experience Provider Monitoring – annually (Assess example POE & Logbook) R3 250

Learnership Fees iro Training Contracts	Number of Learners
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Registration of Contract per Learner R 750

Annual Administration Levy iro each Learner R 250

Candidate Fees

Tax Technician Knowledge Competency Assessment (RPL Entry Exam) R3 200

Tax Technician External Integrated Summative Assessment (Final Exam) R 4 500

5. Section A: Organisational Information

A1: Organisational Details

Please provide details of the organisation.

Name of Organisation

Faculty / School

Department

VAT Number

Physical address

Postal address

Telephone number

Fax number

Website

A2: Contact Details

Please provide details of the person directly responsible for the Tax Technician Qualification Accreditation Application of the organisation.

Title

First Name

Surname

Position

Telephone Number

Mobile Number

Fax Number

E-mail Address

6. Section B: Knowledge Competency Provider

SAIT will recommend possible skills development providers to the QCTO for formal accreditation.

B1: Accreditation with the Council for Higher Education (CHE)

Is your institution currently accredited by the CHE to offer qualifications in taxation?

Yes No

If **Yes** please provide the following information regarding the qualification(s)

Qualification Name (as registered on the NLRD)	NLRD Qualification ID	NQF Level

If **No**, is your organisation accredited by the CHE to offer any other (related) qualification(s)?

Yes No

B2: Registration with the Department of Higher Education and Training to offer the programme(s) listed in B1 above

Is your organisation or institution registered with the Department of Higher Education and Training to offer the qualifications listed in B1?

Yes No

B3: List the Modules of the Tax Technician Qualification which you intend to offer

List the Knowledge Modules for which you want to be accredited. Please refer to the Tax Technician Qualification Curriculum Document for further guidance. If the content of the modules correspond with the content of a qualification for which you are already accredited by the CHE, please provide details of the qualification and the specific course(s) in which the Tax Technician Qualification's content will be offered.

Tax Professional Learnership Qualification					Corresponding Qualification (CHE)							
Name of Module	Mark Modules for Accreditation with X	Module Number	NQF Level	Credits	Mode of delivery (D=distance, R=residential)	Semester in which Module will be offered	Name of Qualification	NLRD ID	Name of Course / Module	NQF Level	Credits	
				144								
Tax Legislation		331303001-KM-01	5	40								
Tax Administration		331303001-KM-02	5	20								
Taxation of Business		331303001-KM-03	6	10								
Taxation of Individual		331303001-KM-04	6	10								
Value Added Tax		331303001-KM-05	6	10								
Commercial Law		331303001-KM-06	4	6								
Financial Accounting		331303001-KM-07	6	20								
Basic Principles of Cost and Management Accounting		331303001-KM-08	4	10								
Management of Business		331303001-KM-09	5	10								
Ethics and Risk		331303001-KM-10	5	8								

B4: Staff Responsible for the Tax Technician Qualification Knowledge Modules

Please provide the following information on the members of staff who will offer the Knowledge Modules for the Tax Technician Qualification.

Name	Position in Department (e.g. Senior Lecturer)	Highest Educational Qualification

B5: Documents to be submitted in support of the Application

The following documents have to be submitted in support of the Accreditation Application:

- Please refer to the QCTO application documents:
 - a. Skills Development Provider Accreditation Application Form
 - b. Criteria and guidelines for accreditation of skills development providers.
- Suggested Support Documents to be submitted:
 - a. For each of the modules as listed in the table per Section B3, learning outcomes and assessment criteria as per the organisations or institutions' study guides.
 - b. Examination papers, including the report of the external examiner.
 - c. CV's of the members of staff responsible for the Knowledge Modules of the Tax Professional Qualification as listed in the table per Section B4.

Section C: Practical Skills Provider

SAIT will recommend possible skills development providers to the QCTO for formal accreditation.

C1: List the Modules of the Tax Technician Qualification which you intend to offer

List the Practical Skills Modules for which you want to be accredited. Please refer to the Tax Technician Qualification Curriculum Document for further guidance.

Name of Module	Mark Modules for Accreditation with X	Module Number	NQF Level	Credits
Complete registration documents or register taxpayer online		331303001-PM-01	5	21
Drafting, checking and classifying tax records and source documents		331303001-PM-02	5	21
Compute tax liability using relevant legal, accounting and tax principles		331303001-PM-03	6	40
Submitting tax returns		331303001-PM-04	5	10
Producing tax packs for audit and review functions		331303001-PM-05	6	21
Analysing assessments		331303001-PM-06	6	8
Participate in ADR (objection only) process		331303001-PM-07	5	8
Maintain timesheets		331303001-PM-08	5	8

C2: Staff Responsible for the Tax Technician Qualification Practical Skills Modules

Please provide the following information on the members of staff who will offer the Practical Skills Modules for the Tax Professional Qualification.

Name	Position in Organisation	Highest Educational Qualification	Years of Practical Experience in a Tax Environment

C3: Teaching of Practical Skills Modules

Please describe the measures that you have taken to ensure that real-life practical examples are used in the teaching of the Practical Skills Modules.

C4: Assessment of Practical Skills Modules

Please describe how the Practical Skills Modules will be assessed.

C5: Documents to be submitted in support of the Application

The following documents have to be submitted in support of the Accreditation Application:

- Please refer to the QCTO application documents:
 - a. Skills Development Provider Accreditation Application Form
 - b. Criteria and guidelines for accreditation of skills development providers.
- Suggested Support Documents to be submitted:
 - a. For each of the modules as listed in the table per Section C1, learning outcomes and assessment criteria as per the organisations or institutions' study guides.
 - b. Assessment papers.
 - c. CV's of the members of staff responsible for the Practical Skills Modules of the Tax Professional Qualification as listed in the table per Section C2.

7. Section D: Workplace Experience Provider

D1: Number of Learners on Learnership Programme

Please give an indication of the number of learners that you would be registering for the Learnership. To enter this Learnership a minimum of an NQF level 6 qualification in the fields of commerce or accountancy or law is needed.

Year	2016	2017	2018
Number of Learners			

D2: Existing Approval as a Workplace Training Provider

Is your Organisation currently approved as a Workplace Training Provider by any of the following Professional Bodies?

Professional Body	Yes
SAICA	
SAIPA	
ACCA	
LSSA	
CIMA	

Other (please provide details)

D3: Provision on Workplace Experience Modules

Does your Organisation have the required client base and the resources to provide the following Workplace Experience Modules as per the Tax Professional Qualification Curriculum?

Workplace Experience Component: Private Practice and SARS Name of Module	Resources Available to Deliver Training Yes / No		NQF Level	Credits
Complete registration documents or register taxpayer online		331303001-WM-01	5	21
Drafting, checking and classifying tax records and source documents		331303001-WM-02	5	21
Capture tax liability using relevant legal, accounting and tax principles		331303001-WM-03	6	40
Submitting tax returns		331303001-WM-04	5	10
Producing tax packs for audit and review functions		331303001-WM-05	6	21
Analysing assessments		331303001-WM-06	6	8
Participate in the ADR (objection only) process		331303001-WM-07	5	8
Maintain timesheets		331303001-WM-08	5	8

D4: Training Programme

Please provide details about how you plan to run the Training Programme in your Organisation. Provide, for example details of how learners will be placed in specialist units or how they will rotate in the organisation. Attach detailed training plan.

D5: Registered Tax Practitioners

How many of the staff members in your organisation are registered with SARS as Tax Practitioners?

D6: Training Supervisor Details

Please provide the following details of the Training Supervisor(s) who will be responsible for the Learners in your Organisation:

Name	Position in Organisation	Highest Educational Qualification	Years of Work Experience in a Tax Environment	Professional Body Membership

D7: SETA and Skills Levy Details

SETA your Organisation is currently registered with

Skills Development Levy Number

D8: Employer Undertaking

As an employer, will you be able to make the following commitment to your learners:

	Yes / No
Register the Learnership Agreement with the SAIT	
Recruit and select Learners for the Learnership Programme	
Provide the Learner with the necessary Workplace Experience, Supervision and Mentorship for the particular Learnership	
Be able to provide Training on all the Workplace Experience Modules relevant to Private Practice or SARS	
Provide Training Supervisors in line with the Mentor / Learner ratio guidelines set by SAIT	
Release the Learner to attend Training at the Training Provider or, if the Learner studies through Distance Education, to work through the Relevant Study Material	
Ensure that the Learner will be Assessed by a Registered Assessor	

If answered no, kindly provide details why the specific area(s) will be a challenge or present problems?

D9: Documents to be submitted in support of the Application

The following documents have to be submitted in support of the Accreditation Application:

- Proof of current Approval as a Workplace Training Provider by a Professional Body as listed in the table per Section D2.
- Detail Training Plan as listed per Section D4.
- List of Training Supervisors details as listed in the table per Section D6.
- Proof of Registration with relevant SETA as listed per Section D7.
- Tax Clearance Certificate.

8. Section E: Training Officer Authentication

This section should be signed by the senior person responsible for the delivery of the training

I hereby declare that the above information is correct, valid and accurate and all the supporting documents are submitted with the application form.

Signed at _____ on the _____ of _____ 20____

Signature

Full Name

Title

Annexure A: Checklist for New Applicants

A1. Requirements for Knowledge Component

Criteria	Requirements for Knowledge Component	Accreditation Committee Comments
Training Facilities	Adequate training rooms, equipment, research support and learning management systems	
Qualified Staff	Sufficient number of appropriately qualified members of staff	
Course Material	Quality training materials, guides and course outcomes that match the Knowledge Modules Outcomes	
Course Assessment	Quality course assessment criteria, sound assessment processes and procedures	
DHET Registration	Proof of registration with the Department of Higher Education	
SAQA Registration	Qualification(s) registered with SAQA	

A2. Requirements for Practical Skills Component

Criteria	Requirements for Practical Skills Component	Accreditation Committee Comments
Training Facilities	Adequate training rooms, equipment, research support and learning management systems	
Qualified Trainers	Sufficient number of appropriately qualified trainers	
Practical Skills Training Material	Quality training materials, guides and course outcomes that match the Practical Skills Modules Outcomes	
Practical Skills Assessment	Quality practical skills assessment criteria, sound assessment processes and procedures	
Training Policies	Training policies setting out roles and responsibilities of learners, trainers and assessors	
Registration with Professional Bodies, DHET or SAQA	Proof of registration with Professional Bodies or training authorities as institution as well as module or programme registration	

A3. Requirements for Workplace Experience Component

Criteria	Requirements for Workplace Experience Component	Accreditation Committee Comments
Capacity to Deliver	Sufficient training capacity to deliver on all the Workplace Experience Modules	
Qualified Trainers	Sufficient number of appropriately qualified trainers	
Training Policies	Training policies setting out roles and responsibilities of learners and trainers	
Scope of Client Base	The scope of the employers client base sufficient to ensure exposure to all tax types and all different types of entities	
Training Programmes	The quality and depth of training programmes and development plans of individuals	
Registration	Proof of registration with other Professional Bodies as Training Provider and registration as tax practitioner with SARS if private practice	
Compliance	Compliance with SDL, Tax and other Statutory requirements	
Support to Learners	The financial and non-financial support to learners	

Annexure B: Monitoring Site Visit Checklist

Criteria	Requirement	Accreditation Committee Comments
Training Infrastructure	Review the training facilities, policies, systems and material to ensure quality	
Learner Experience	Interview a selection of learners to get feedback of their learning experience	
Trainer Experience	Interview trainers, instructors and lecturers to get feedback on the training and teaching experience	
Progress of Learners	Review the progress of learners on the Learnership in terms of results, evaluations, and training records	
Support provided to Learners	Review the support provided to learners, taking into account their feedback and possible changes to training policies	
Continued capacity to deliver the training	Review the ongoing capacity in terms of appropriately qualified trainers to deliver all the modules in respect of the different learning components and accreditation approval	