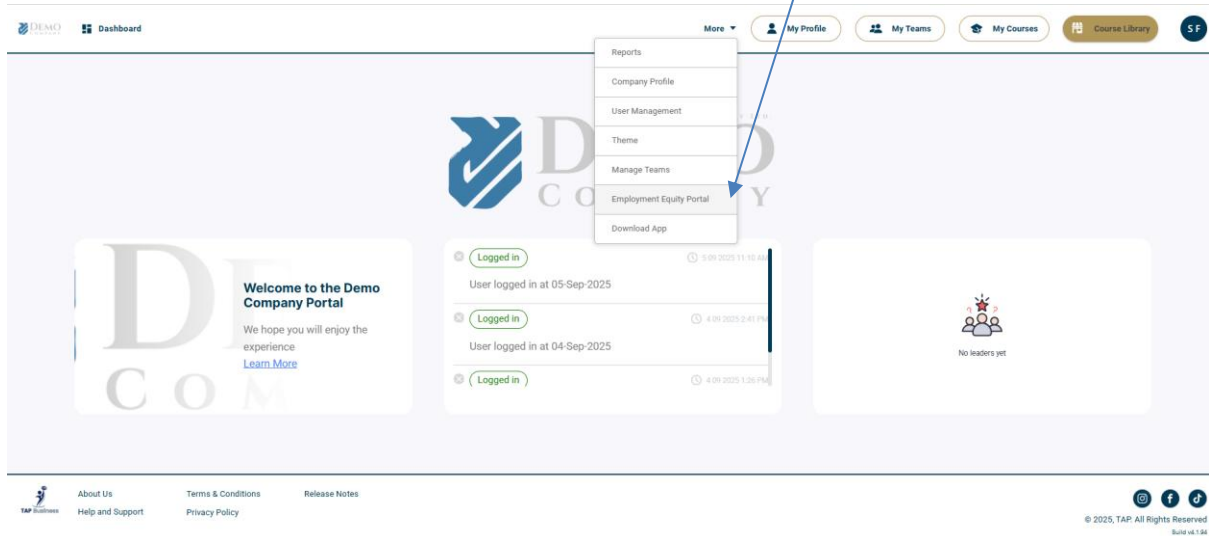



Add, promote, terminate and / or reinstate an employee

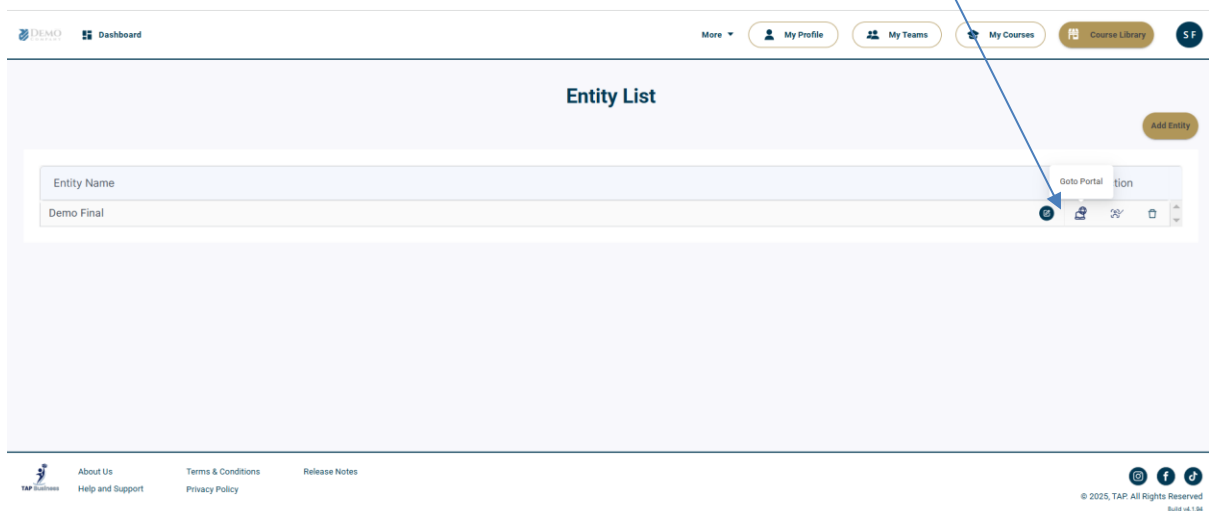
How to access the workforce profile data through the EE Dashboard.

Once you logged in, click on “More” and select "Employment Equity Portal”.

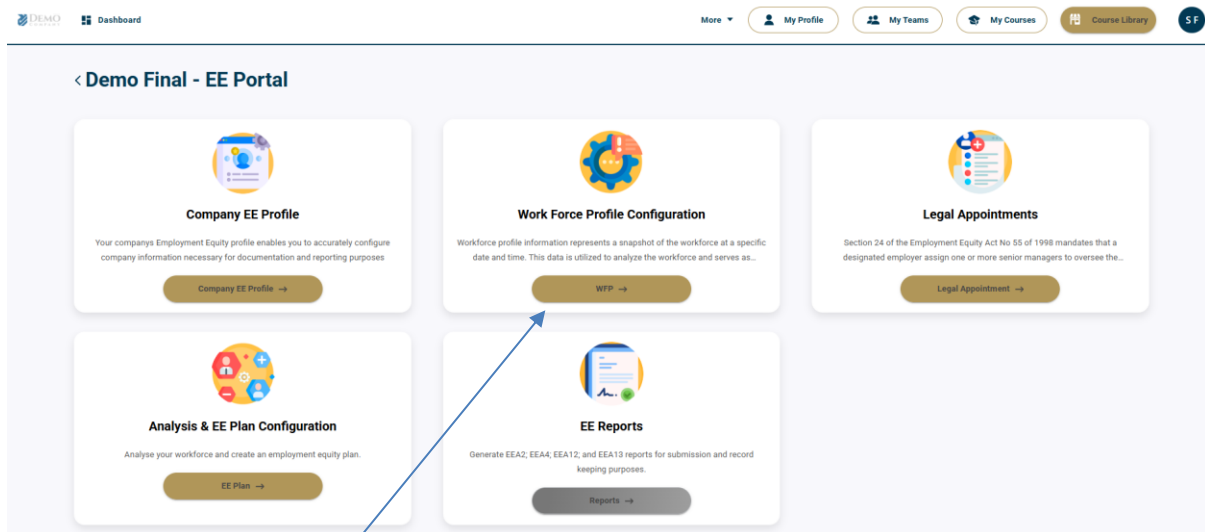


The following screen will be displayed, click on the “Go to Portal” icon to see the EE Dashboard.

 icon to see the EE Dashboard.



The EE Dashboard:



Click on the “WFP->” button in the Workforce Profile Configuration tile.

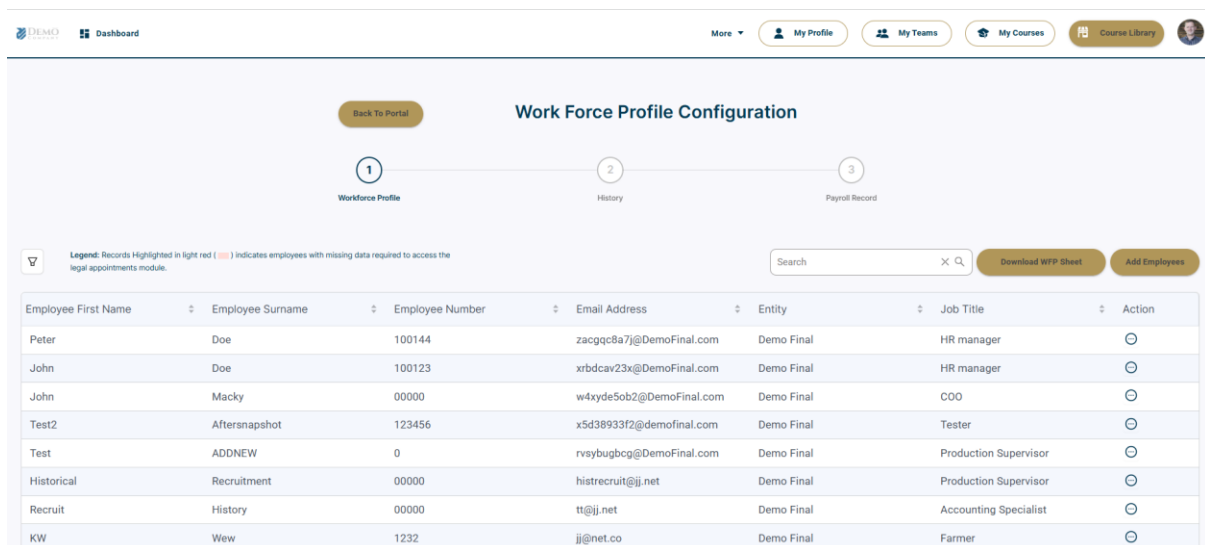


In the “Workforce Profile Configuration” Section. The following tasks can be performed:

1. Add an Employee
2. Promote an Employee
3. Terminate an Employee
4. Reinstate an Employee

These tasks will be explained in this document.

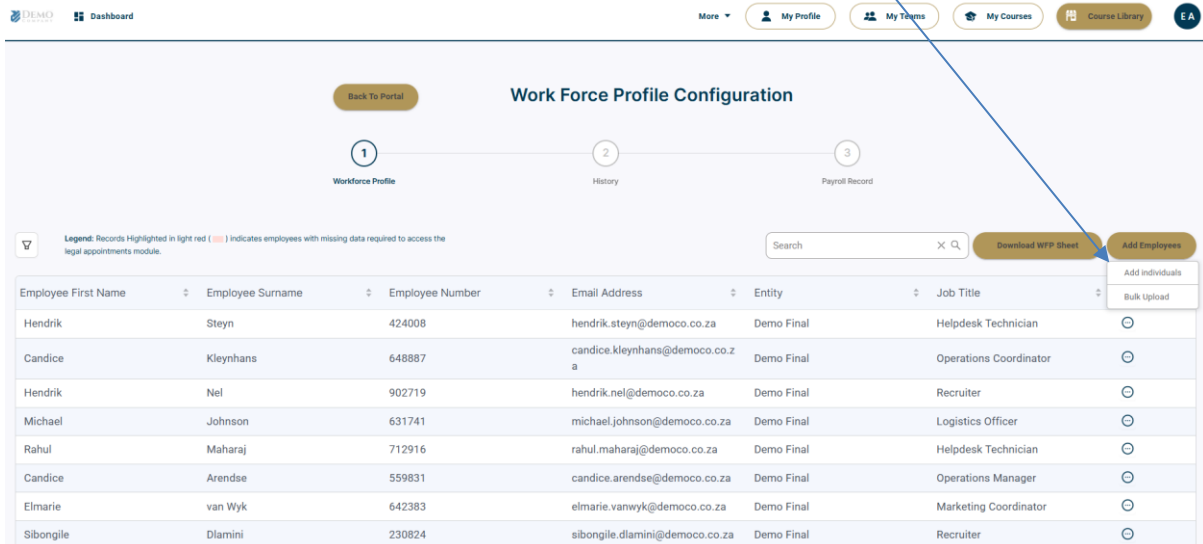
The “Workforce Profile Configuration” is displayed below when you click the “WFP ->” button.



Add an Employee:

There are two methods for adding employees:

1. Add individual (This is the method to be used going forward).
2. Bulk upload (This was used to setup the initial WFP and will no longer be used).



The screenshot shows the 'Work Force Profile Configuration' page. At the top, there is a navigation bar with 'Dashboard', 'My Profile', 'My Teams', 'My Courses', and 'Course Library'. Below this is a progress indicator with three steps: '1 Workforce Profile', '2 History', and '3 Payroll Record'. A legend indicates that records highlighted in light red indicate missing data. A search bar and 'Download WFP Sheet' button are present. The 'Add Employees' button is highlighted with a blue arrow. Below the legend is a table of employees with columns for Employee First Name, Employee Surname, Employee Number, Email Address, Entity, and Job Title. The table contains 8 rows of employee data.

| Employee First Name | Employee Surname | Employee Number | Email Address | Entity | Job Title |
|---------------------|------------------|-----------------|--------------------------------|------------|------------------------|
| Hendrik | Steyn | 424008 | hendrik.steyn@democo.co.za | Demo Final | Helpdesk Technician |
| Candice | Kleynhans | 648887 | candice.kleynhans@democo.co.za | Demo Final | Operations Coordinator |
| Hendrik | Nel | 902719 | hendrik.nel@democo.co.za | Demo Final | Recruiter |
| Michael | Johnson | 631741 | michael.johnson@democo.co.za | Demo Final | Logistics Officer |
| Rahul | Maharaj | 712916 | rahul.maharaj@democo.co.za | Demo Final | Helpdesk Technician |
| Candice | Arendse | 559831 | candice.arendse@democo.co.za | Demo Final | Operations Manager |
| Elmarie | van Wyk | 642383 | elmarie.vanwyk@democo.co.za | Demo Final | Marketing Coordinator |
| Sibongile | Dlamini | 230824 | sibongile.dlamini@democo.co.za | Demo Final | Recruiter |

Add Individuals:

You will need to complete the fields displayed. Fields marked with an (*) are mandatory fields.

The form is divided into four main sections:

1. Biographical Information
2. Employee Address Information
3. Job Information
4. Disability Status

Please complete all the sections as **thoroughly as possible**.

Once you have completed the form click on the "Submit" button to complete the employee addition.

Click on "Add Employees".



The screenshot shows the 'Work Force Profile Configuration' page, similar to the previous one. A blue arrow points from the 'Add Employees' button in the bottom right corner to the '1 Workforce Profile' step in the progress indicator.

This is displayed in Section 1 Workforce Profile.

Click on "Add Individuals".

Search X Q Download WFP Sheet Add Employees

| Entity | Job Title | |
|------------|------------|---|
| Demo Final | HR manager | ⋮ |
| Demo Final | HR manager | ⋮ |

- Add individuals
- Bulk Upload

The following form will be displayed:

Please search Employee using email

Email Address

Biographical Information

Employee First Name * Employee Surname *

Employee Number *

Contact Number: +27 Ethnicity

Foreign Citizen ID Number

DOB Age

Gender

Please complete the "Biographical Information". Please note that, if the new employee is a Foreign National, click the slider button to "Yes", change the Ethnicity to Foreign National and add the passport number into the Passport Number Field as seen below:

Biographical Information

Employee First Name * Employee Surname *

Employee Number *

Contact Number: +27 Ethnicity

Foreign Citizen ID Number

DOB Age

Gender

Passport Number

ADR1234567


Scrolling down will display the “Employee Address Information” – This is a non-mandatory section; complete should you like.

Employee Address Information

| | |
|----------------|-------------|
| Street Address | Suburb |
| City | Country |
| Province/State | Postal Code |

Scrolling down will display the Job Information – Please complete the mandatory fields marked with an Asterix (*).

Job Information

| | |
|--------------------------------|---|
| Entity * Demo Final | Branch |
| Department | Business Unit |
| Job Title * | Starting Date *  |
| OFO Code | Occupation Title |
| Occupation Level | Employment Status * |
| Was Promoted | |
| Access Type Employee Record | |

Please note in the drop-down selection for “Employment Status” there are several options available. For EE purposes, select **“Permanent”**.

To add a temporary employee, select temporary in the “Occupational level” drop-down and permanent in the “Employment Status” drop-down.

To add a fulltime employee, select the applicable Occupational Level in the “Occupational Level” and permanent in the “Employment Status” drop-down.

The screenshot shows a form titled "Job Information" with the following fields:

- Entity * (Demo Final)
- Branch
- Department
- Business Unit
- Job Title *
- Starting Date *
- OFO Code
- Occupation Title
- Occupation Level (Temporary)
- Employment Status * (Permanent)
- Was Promoted (No)
- Access Type (Employee Record)

Three blue arrows point from the text above to the "Occupation Level", "Employment Status", and "Was Promoted" fields.

In the field “Was Promoted”, please select “No”, as we are adding a new employee who has not yet been promoted.

Scrolling down will display the Disability Status – Please select the correct option “Yes” or “No”.

The screenshot shows a form titled "Disability Status" with the following field:

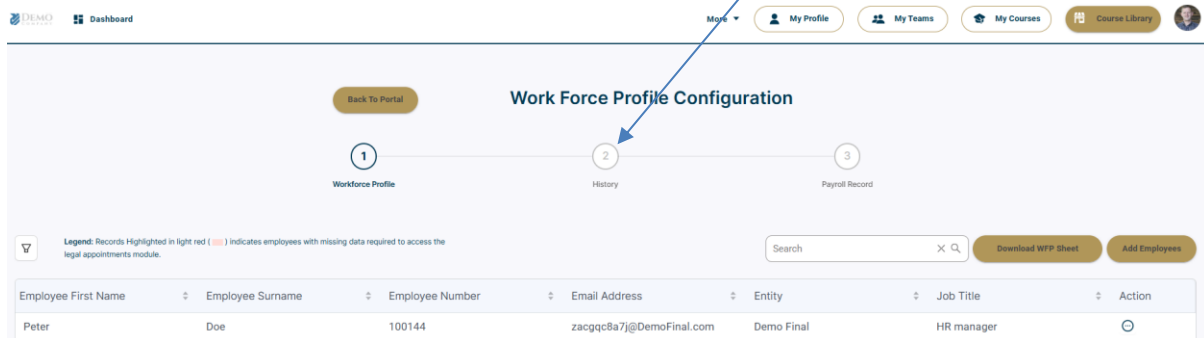
- Disabled (Y/N)

A "Submit" button is located at the bottom right of the form.

Please click the “Submit” button to save and add the employee to the workforce profile.

Promote

In the Workforce Profile Configuration Section, please click on “History (2)” to view the History section:



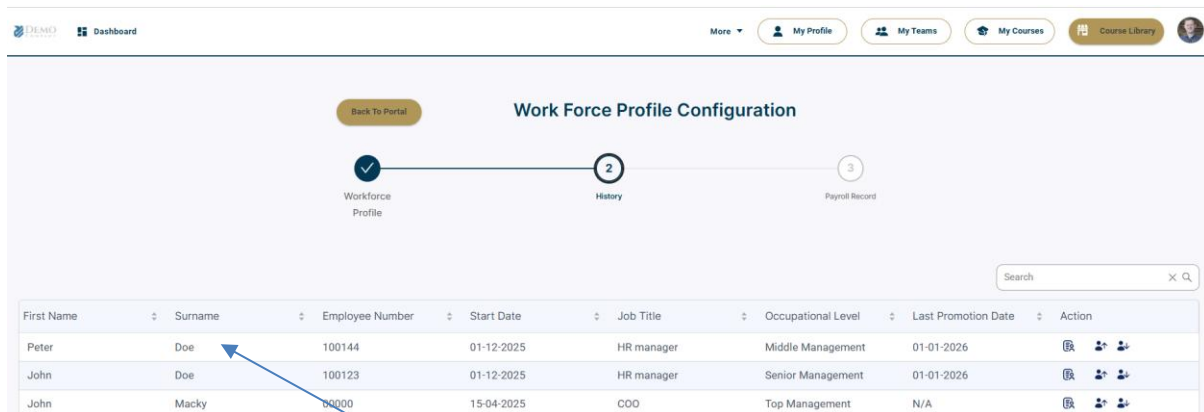
Work Force Profile Configuration

1 Workforce Profile 2 History 3 Payroll Record

Legend: Records Highlighted in light red () indicates employees with missing data required to access the legal appointments module.

| Employee First Name | Employee Surname | Employee Number | Email Address | Entity | Job Title | Action |
|---------------------|------------------|-----------------|--------------------------|------------|------------|--------|
| Peter | Doe | 100144 | zacqgc8a7j@DemoFinal.com | Demo Final | HR manager | |

The following screen will be displayed as below. Please select the employee eligible for promotion.



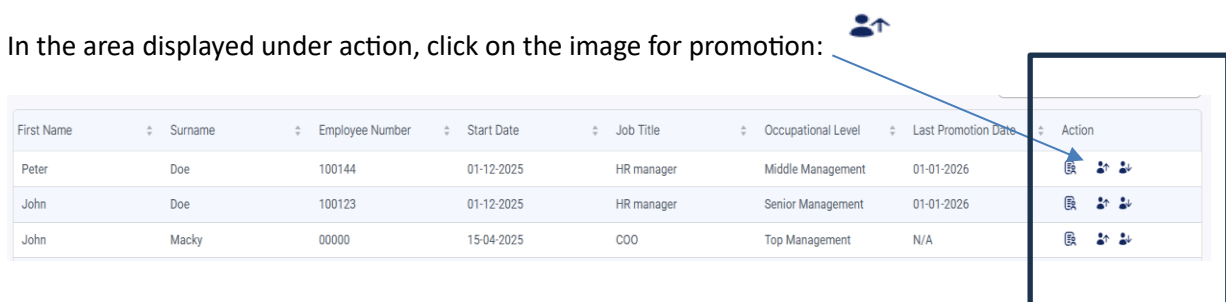
Work Force Profile Configuration

Workforce Profile 2 History 3 Payroll Record

| First Name | Surname | Employee Number | Start Date | Job Title | Occupational Level | Last Promotion Date | Action |
|------------|---------|-----------------|------------|------------|--------------------|---------------------|--------|
| Peter | Doe | 100144 | 01-12-2025 | HR manager | Middle Management | 01-01-2026 | |
| John | Doe | 100123 | 01-12-2025 | HR manager | Senior Management | 01-01-2026 | |
| John | Macky | 00000 | 15-04-2025 | COO | Top Management | N/A | |

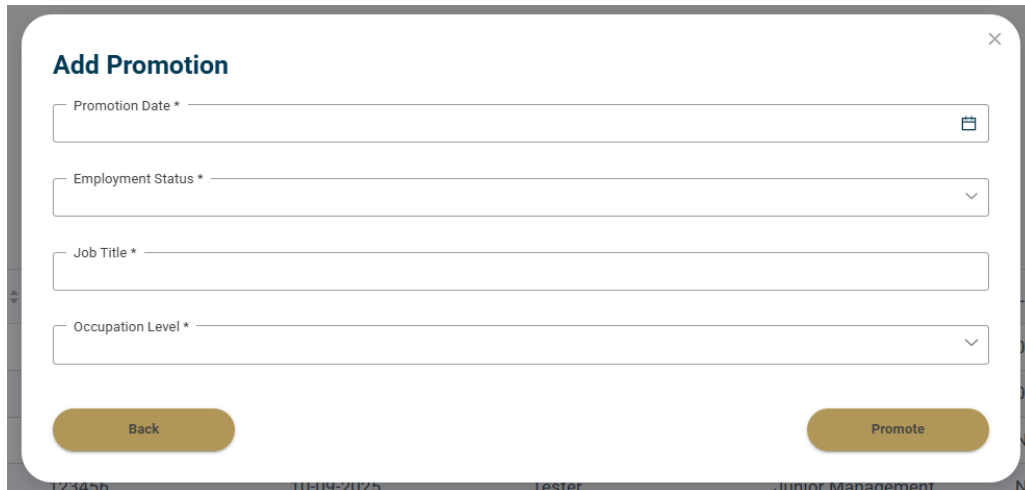
In this example we will select Peter Doe, Middle Management, HR Manager, to be promoted to Senior Management.

In the area displayed under action, click on the image for promotion:



| First Name | Surname | Employee Number | Start Date | Job Title | Occupational Level | Last Promotion Date | Action |
|------------|---------|-----------------|------------|------------|--------------------|---------------------|--------|
| Peter | Doe | 100144 | 01-12-2025 | HR manager | Middle Management | 01-01-2026 | |
| John | Doe | 100123 | 01-12-2025 | HR manager | Senior Management | 01-01-2026 | |
| John | Macky | 00000 | 15-04-2025 | COO | Top Management | N/A | |

The following form will be displayed:

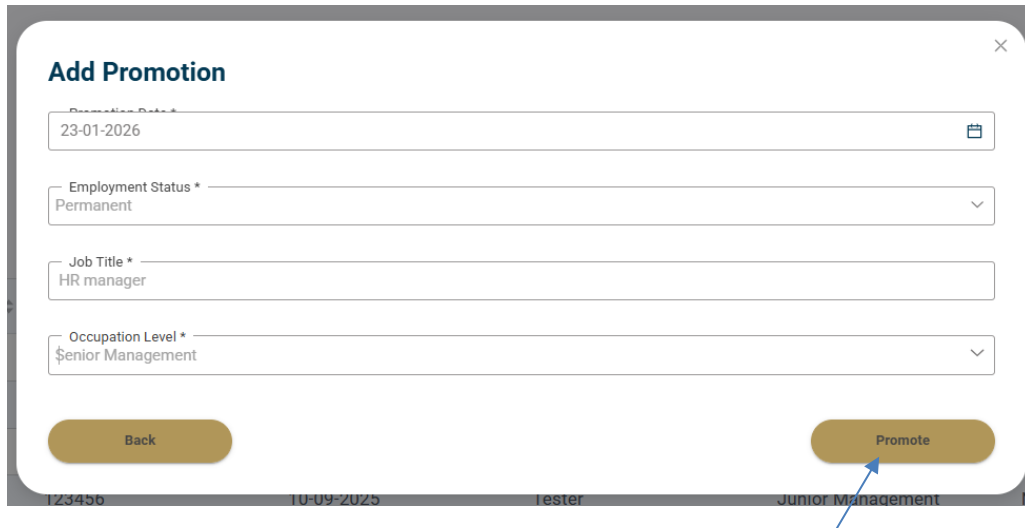


The screenshot shows a modal window titled "Add Promotion" with a close button (X) in the top right corner. It contains four mandatory fields, each with an asterisk: "Promotion Date *", "Employment Status *", "Job Title *", and "Occupation Level *". The "Promotion Date" field has a calendar icon on the right. Below the fields are two buttons: "Back" on the left and "Promote" on the right. At the bottom of the modal, there is a status bar with the following text: "123456 10-09-2025 Tester Junior Management N/".

Complete the four mandatory fields below:

- "Promotion Date" from the date selector.
- "Permanent" as the "Employment Status".
- Verify whether "Job Title" changed and update accordingly, if needed.
- The "Occupation Level" will change to the new "Occupational Level".

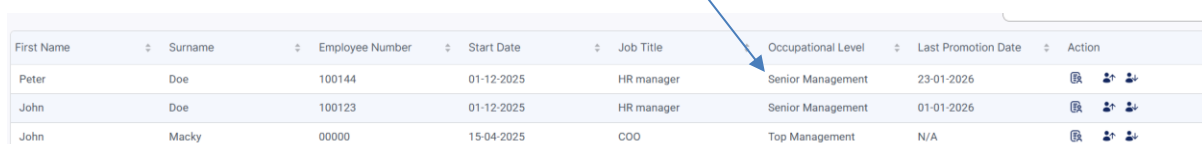
IMPORTANT NOTE: You will only be able to promote an employee in a higher Occupational Level, and not a lower level, as the EEA2 does not accommodate "Demotions" into a lower Occupational Level.



The screenshot shows the same "Add Promotion" modal window, but now the fields are filled: "Promotion Date" is "23-01-2026", "Employment Status" is "Permanent", "Job Title" is "HR manager", and "Occupation Level" is "Senior Management". The "Promote" button is highlighted with a blue arrow pointing to it. The status bar at the bottom remains the same: "123456 10-09-2025 Tester Junior Management N/".

Once all the details have been correctly added, you can click the "Promote" button to promote the employee.

Updated employee information after the page has been refreshed.

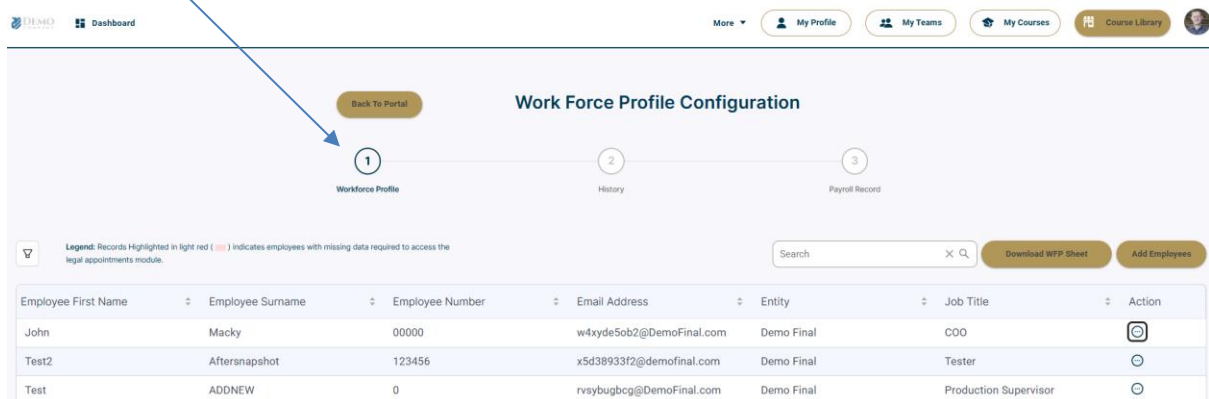


The screenshot shows a table with the following columns: First Name, Surname, Employee Number, Start Date, Job Title, Occupational Level, Last Promotion Date, and Action. The table contains three rows of data. A blue arrow points from the "Promote" button in the previous screenshot to the "Occupational Level" column of the first row, which now shows "Senior Management".

| First Name | Surname | Employee Number | Start Date | Job Title | Occupational Level | Last Promotion Date | Action |
|------------|---------|-----------------|------------|------------|--------------------|---------------------|--------|
| Peter | Doe | 100144 | 01-12-2025 | HR manager | Senior Management | 23-01-2026 | 🔍 👤 ⬇️ |
| John | Doe | 100123 | 01-12-2025 | HR manager | Senior Management | 01-01-2026 | 🔍 👤 ⬇️ |
| John | Macky | 00000 | 15-04-2025 | COO | Top Management | N/A | 🔍 👤 ⬇️ |

Terminate

Proceed to Section 1 Workforce Profile:



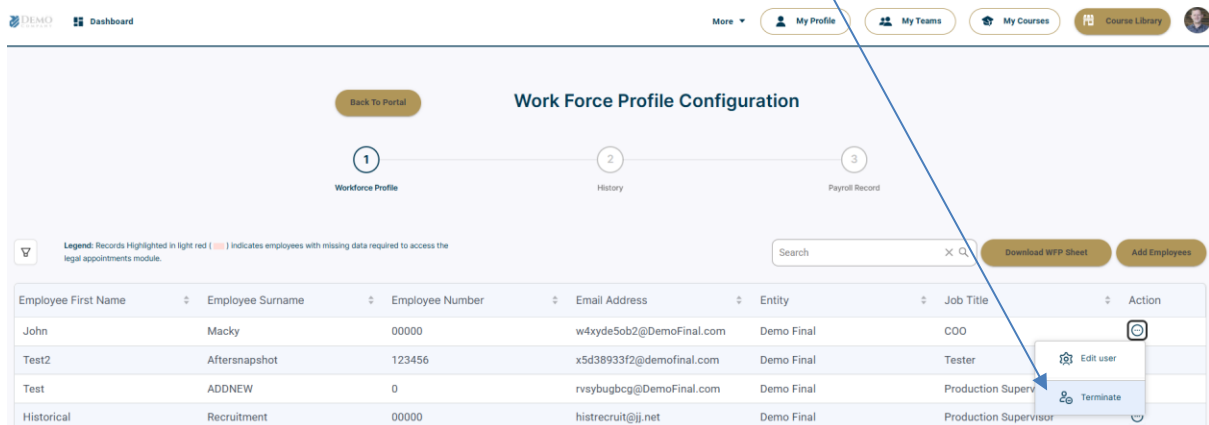
Work Force Profile Configuration

1 Workforce Profile 2 History 3 Payroll Record

Legend: Records Highlighted in light red () indicates employees with missing data required to access the legal appointments module.

| Employee First Name | Employee Surname | Employee Number | Email Address | Entity | Job Title | Action |
|---------------------|------------------|-----------------|--------------------------|------------|-----------------------|--------|
| John | Macky | 00000 | w4xyde5ob2@DemoFinal.com | Demo Final | COO | |
| Test2 | Afternapshot | 123456 | x5d38933f2@demofinal.com | Demo Final | Tester | |
| Test | ADDNEW | 0 | rvsybugbcq@DemoFinal.com | Demo Final | Production Supervisor | |

Under the action section, hover over the action button, select and click “Terminate”.



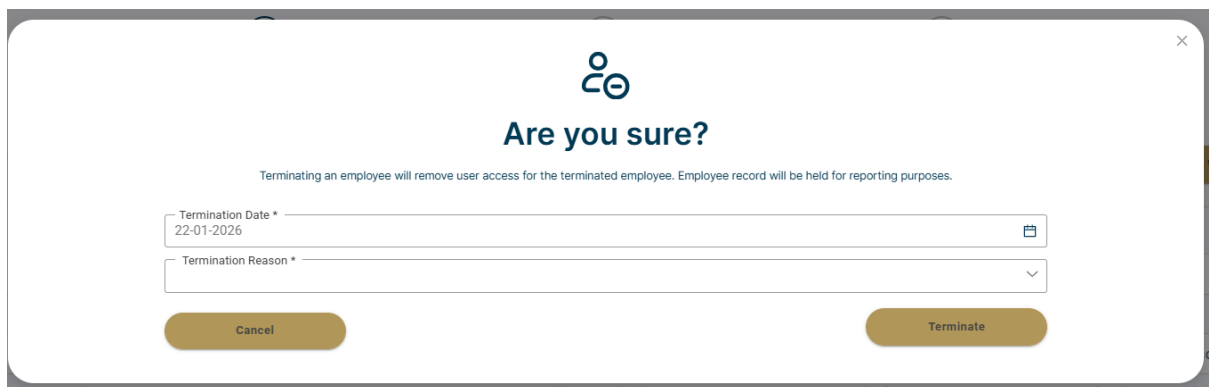
Work Force Profile Configuration

1 Workforce Profile 2 History 3 Payroll Record

Legend: Records Highlighted in light red () indicates employees with missing data required to access the legal appointments module.

| Employee First Name | Employee Surname | Employee Number | Email Address | Entity | Job Title | Action |
|---------------------|------------------|-----------------|--------------------------|------------|-----------------------|--------|
| John | Macky | 00000 | w4xyde5ob2@DemoFinal.com | Demo Final | COO | |
| Test2 | Afternapshot | 123456 | x5d38933f2@demofinal.com | Demo Final | Tester | |
| Test | ADDNEW | 0 | rvsybugbcq@DemoFinal.com | Demo Final | Production Superv | |
| Historical | Recruitment | 00000 | histrecruit@ji.net | Demo Final | Production Supervisor | |

The following screen will be displayed:



Are you sure?

Terminating an employee will remove user access for the terminated employee. Employee record will be held for reporting purposes.

Termination Date * 22-01-2026

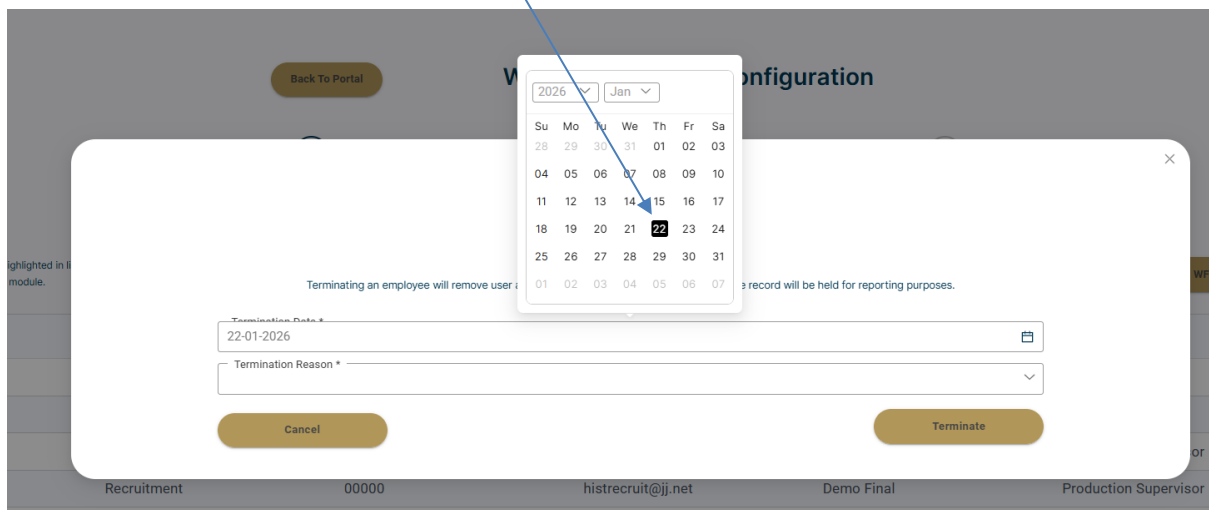
Termination Reason *

Cancel Terminate

IMPORTANT NOTE: You may not select a date prior to the previous submission period.

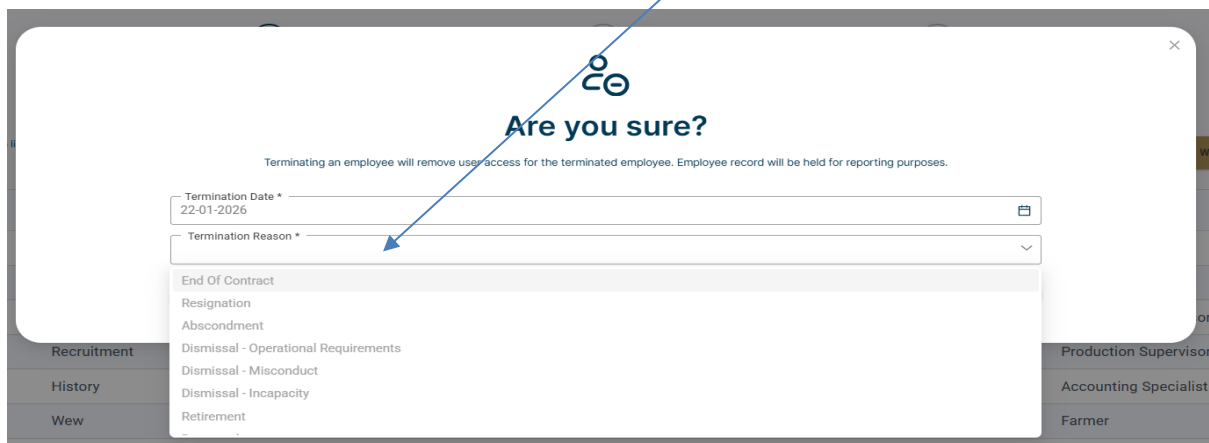
For example, the 2025 snapshot period was from 1 September 2024 to 31 August 2025, therefore you may not select a termination date before 1 September 2025 to terminate the employee, as these reports were submitted to the DEL already.

Please select the appropriate "Termination Date" from the date selector:



The screenshot shows a web application interface for terminating an employee. A date selector is open, showing a calendar for January 2026. The date 22 is selected. Below the calendar, the "Termination Date" field contains "22-01-2026". The "Termination Reason" field is empty. There are "Cancel" and "Terminate" buttons. A warning message states: "Terminating an employee will remove user access for the terminated employee. Employee record will be held for reporting purposes." The background shows a sidebar with "Recruitment" selected and a user profile for "Production Supervisor".

By clicking on the drop-down combo box, please select a reason for the termination.



The screenshot shows the same termination configuration form, but the "Termination Reason" dropdown menu is open. The menu lists several options: "End Of Contract", "Resignation", "Abscondment", "Dismissal - Operational Requirements", "Dismissal - Misconduct", "Dismissal - Incapacity", and "Retirement". The "Are you sure?" warning message is visible above the form fields. The background shows the same sidebar and user profile.

There are several predefined options available:

- End of Contract
- Resignation
- Abscondment
- Dismissal - Operational Requirements
- Dismissal - Misconduct
- Dismissal - Incapacity
- Retirement
- Deceased
- Other

If you are unsure of the reason, "Other" can be selected as the option.

Once the reason for termination has been selected, click on the “Terminate” button to complete the process.

Are you sure?

Terminating an employee will remove user access for the terminated employee. Employee record will be held for reporting purposes.

Termination Date * 22-01-2026

Termination Reason * End of Contract

Cancel Terminate

You will be directed to the workforce profile screen and, by hovering over the action button, you will note that “Terminate” is no longer displayed, but “Reinstate” is now displayed.

| Employee First Name | Employee Surname | Employee Number | Email Address | Entity | Job Title | Action |
|---------------------|------------------|-----------------|--------------------------|------------|-----------------------|--------|
| Peter | Doe | 100144 | zacgqc8a7j@DemoFinal.com | Demo Final | HR manager | ⊙ |
| John | Doe | 100123 | xrbdcav23x@DemoFinal.com | Demo Final | HR manager | ⊙ |
| John | Macky | 00000 | w4xyde5ob2@DemoFinal.com | Demo Final | COO | ⊙ |
| Test2 | Aftersnapshot | 123456 | x5d3893f2@demofinal.com | Demo Final | Tester | ⊙ |
| Test | ADDNEW | 0 | rvsybugbcg@DemoFinal.com | Demo Final | Production Supervisor | ⊙ |

Reinstate:

If you hover over the action button for the employee that you have terminated, you will see that “Terminate” is no longer an option, but “Reinstate” is now displayed.

DEMO Dashboard More My Profile My Teams My Courses Course Library

Back To Portal

Work Force Profile Configuration

1 Workforce Profile 2 History 3 Payroll Record

Legend: Records Highlighted in light red () indicates employees with missing data required to access the legal appointments module.

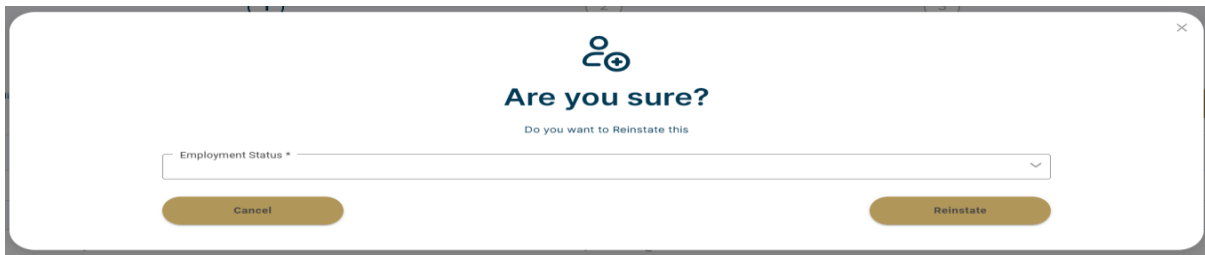
Search X Q Download WFP Sheet Add Employees

| Employee First Name | Employee Surname | Employee Number | Email Address | Entity | Job Title | Action |
|---------------------|------------------|-----------------|--------------------------|------------|-----------------------|--------|
| John | Macky | 00000 | w4xyde5ob2@DemoFinal.com | Demo Final | COO | ⊙ |
| Test2 | Aftersnapshot | 123456 | x5d3893f2@demofinal.com | Demo Final | Tester | ⊙ |
| Test | ADDNEW | 0 | rvsybugbcg@DemoFinal.com | Demo Final | Production Supervisor | ⊙ |
| Historical | Recruitment | 00000 | histrecruit@ijj.net | Demo Final | Production Supervisor | ⊙ |

You can “Reinstate” the employee should the employee have been a previously captured termination.

IMPORTANT NOTE: When Reinstating, the current EEA2 report to be submitted to the DEL will be updated, indicating a “New Recruit” in the “Workforce Movements – New Recruits” section.

If the employee was terminated and re-employed at the company, "Reinstate" the employee. This is generally used with seasonal workers.



You will "Reinstate" an employee by changing the "Employment Status" to "Permanent":



Then click "Reinstate" and the employee will be reinstated to the active workforce.

When the page refreshes the employee has been reinstated and the options for "Edit User" and "Terminate" are displayed again.

The screenshot shows a table with the following columns: Employee First Name, Employee Surname, Employee Number, Email Address, Entity, Job Title, and Action. A context menu is open over the 'Action' column for the second row (John Doe), showing options for "Edit user" and "Terminate". A blue arrow points from the text above to the "Edit user" option.

| Employee First Name | Employee Surname | Employee Number | Email Address | Entity | Job Title | Action |
|---------------------|------------------|-----------------|--------------------------|------------|-----------------------|--------|
| Peter | Doe | 100144 | zacgqc8a7j@DemoFinal.com | Demo Final | HR manager | ⊙ |
| John | Doe | 100123 | xrbdcav23x@DemoFinal.com | Demo Final | HR manager | ⊙ |
| John | Macky | 00000 | w4xyde5ob2@DemoFinal.com | Demo Final | COO | ⊙ |
| Test2 | Aftersnapshot | 123456 | x5d38933f2@demofinal.com | Demo Final | Tester | ⊙ |
| Test | ADDNEW | 0 | rsvbuobco@DemoFinal.com | Demo Final | Production Supervisor | ⊙ |

To reiterate the **IMPORTANT NOTE**: When Reinstating, the current EEA2 report to be submitted to the DEL will be updated, indicating a "New Recruit" in the "Workforce Movements – New Recruits" section.