national treasury

Department:
National Treasury
REPUBLIC OF SOUTH AFRICA

PUBLIC FINANCE MANAGEMENT KNOWLEDGE QUERIES PORTAL

USER MANUAL FOR USERS OF THE SYSTEM

OFFICE OF THE ACCOUNTANT-GENERAL

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User Manual

Enquiry Logging and Tracking System

Contents

1.   Go to the PFM Knowledge Queries Portal Site (log-in / register)

a)   Go to http://pfmportal.treasury.gov.za/Pages/splash.aspx; or click on the PFM Knowledge Queries Portal Link on the National Treasury Website:

b)   Click "Login / Register"

2.   Registration

a)   First time users must register on the Queries Portal before attempting to log onto the system with a user name and a password; and

b)   After registering on the Queries Portal, users must enter their user name and password as per their registration.
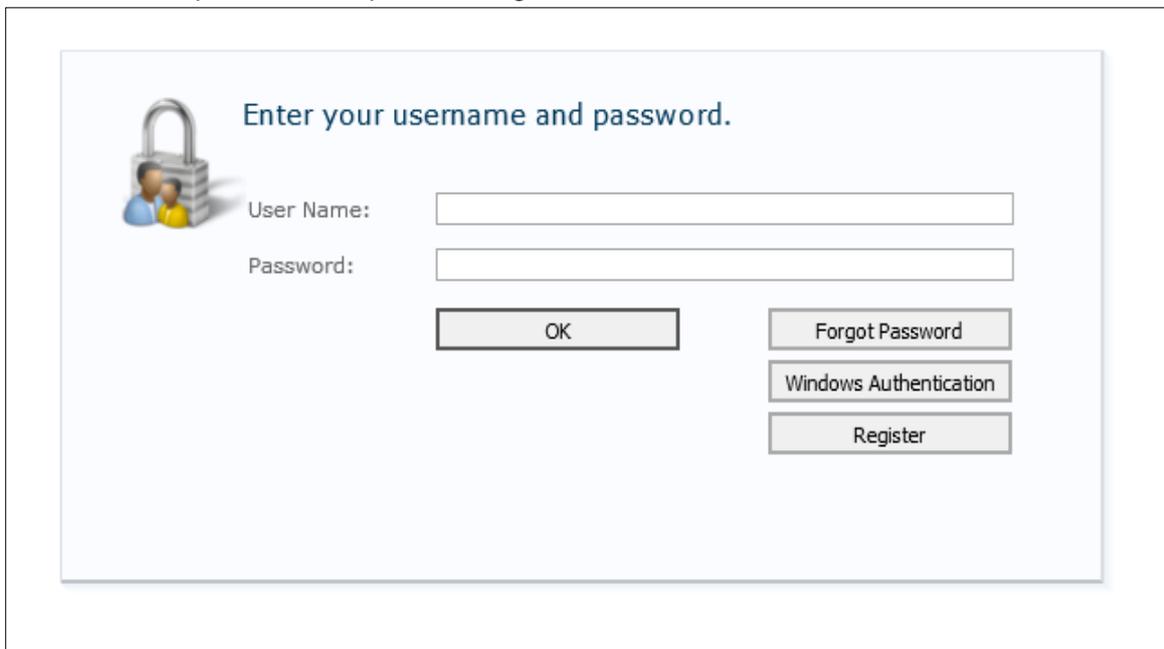
3. User Registration

a) **User Name**: This field may only be completed with the e-mail address that the institution has allocated to user;

b) **First Name and Last Name:** This is self-explanatory.

c) **E-Mail Address:** This field will be completed automatically when the user completes the **User Name** field in **(a);** hence no action is required;

d) **Enter Password:** The user must enter a password that is at least 8 characters in length and which must contain a capital letter, a number and a symbol;

e) **Confirm Password:** The password entered in this field must be exactly the same as the password that was provided in the **Enter Password** field in (d);

f) **E-Mail:** This field will be completed automatically when the user completes the **User Name** field in **(a);** hence no action is required;

g) **Telephone Number:** The user must complete this field with the number that he or she would prefer to be contacted on;

h) **Client:** The user must use the drop down list to select the institution that he or she works for;

i) **Verification:** The verification code in the greyed out box must be entered in the box below the block that contains the verification code;

j) **Cancel:** The user may click on the "Cancel" tab should he or she want to cancel his or her user registration. Please note that this can only be done if the user has not already clicked the "Register" tab to complete his or her registration; and

k) **Register:** Click on the "Register" tab to complete your registration.

Once on landing page click "PFM Knowledge Platform"

4.   Select FAQs to identify if an answer to your enquiry already exists

5.   Select the relevant FAQs
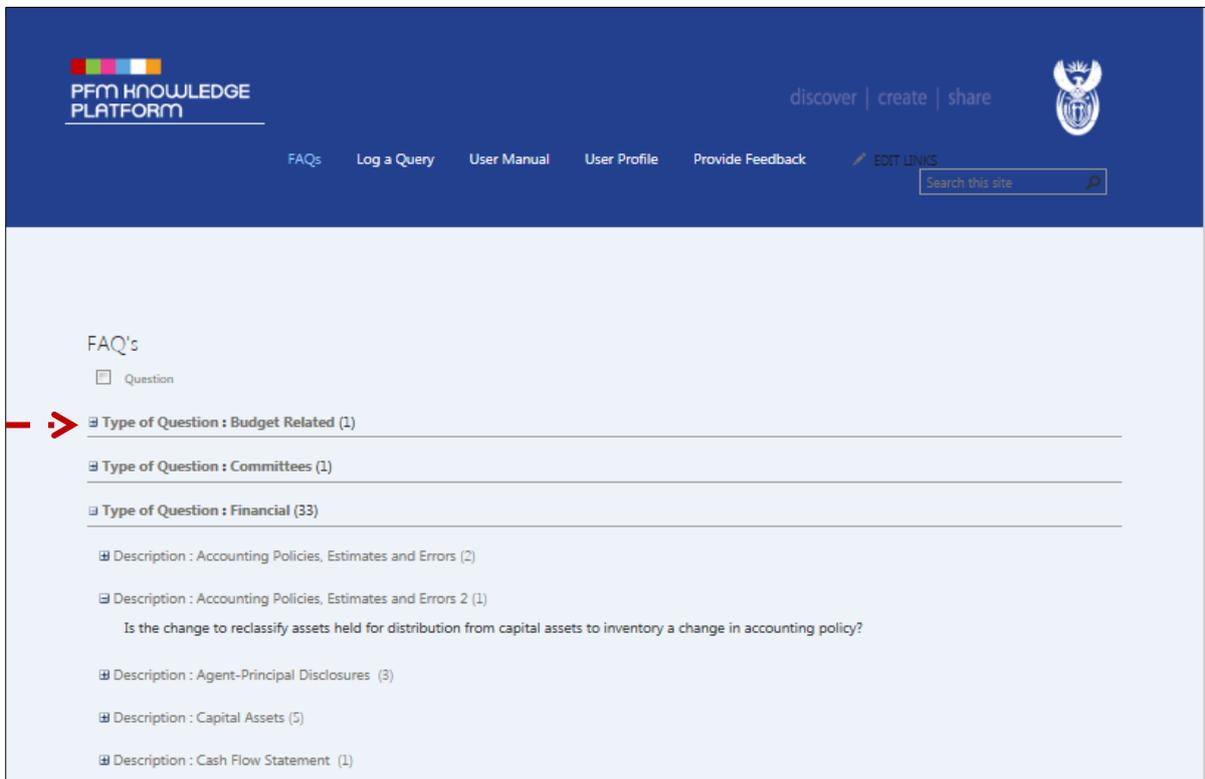
6.   If FAQs are not helpful – Select "Log a Query" from the menu

a)   All queries previously logged by the user will be displayed here.

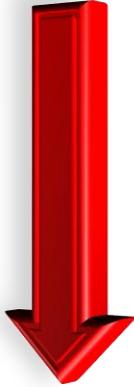**7.   Click "New Item" to log a new enquiry**

    a)   The page on paragraph 8 below will open showing the enquiry submission form

8.   Complete the form and submit / log the enquiry

    a)   The system completes the top part of the form based on the user's registered profile;

    b)   Confirm that the contact details are correct and amend if necessary;

    c)   Select 'PFMA' or 'MFMA' as an appropriate topic for your enquiry;

    d)   The user must include a clear description of the subject matter and type the nature of his or her enquiry;

    e)   Query type – at this stage, the Queries Portal is only designed to deal with enquiries related to the interpretation and application of the PFMA and MFMA;

    f)   The user must upload any documents related to his or her enquiry by clicking on the tab 'Click here to attach a file'; and

    g)   The submit tab must be clicked log the enquiry.

PFM KNOWLEDGE
PLATFORM

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FAQs   Log a Query   User Manual   User Profile   Provide Feedback   EDIT LINKS

Search this site

Queries

New Query

Clients Details

Please ensure that your contact details are correct. If you need to change it go to your "User Profile" and update your details there.

Username	dkrywanio@gmail.com
Email Address	dkrywanio@gmail.com
Tel No	013 1234 567
Client:	Agriculture, Forestry and Fisheries - Marine Living Resources Fund

Query Details

Please ensure that your capture your query correctly as you wont be able to modify it afterwards. If you would like to make a change close this query and open a new one.

MFMA / PFMA	▼
Query	
Query Type	Interpretation / Clarification ▼
Attachments	Click here to attach a file
Status	Logged

Close   Submit

9. Track progress of the enquiry

a) Once the enquiry has been submitted or logged, the user will receive an e-mail within one business day confirming receipt and indicating that an employee in the National Treasury will be allocated the enquiry for a response directly to the user.

b) After the enquiry has been allocated to an employee in the National Treasury, the user will receive an e-mail with a service commitment to provide a response within a certain number of days. The number of days to be taken will be determined by the complexity of the enquiry.

c) The user may track the status of the enquiry at any time by viewing the list of his or her logged queries that have been logged on the Queries Portal. Refer to point 7 above.

10. Finalisation of the enquiry

After the enquiry has been finalised, an e-mail is forwarded to the user with a response.

11. Feedback from the user in relation to the response

Upon receipt of a response in relation to a particular enquiry, the user has the opportunity to provide the National Treasury with feedback whether he or she is satisfied. This feedback can be provided as follows:

a) The user must select the enquiry from the "Log a Query" screen;

b) Feedback must be provided whether he or she is satisfied or not with the response. If the user is not satisfied, he or she must provide reasons; and

c) If the user selects the "not satisfied" tab, the relevant official within the National Treasury that provided the response will contact the user.

12. Closure of enquiry

a) The enquiry shall be closed if the user indicates that he or she is satisfied with the response.

b) If the user does not provide feedback to the National Treasury within 5 working days from forwarding the response, the Queries Portal will automatically close the enquiry.