



Six (6) Step Discretionary Grant Claim Form Guideline

Step 1 Find the Discretionary Grant Claim Form

- When the entity reaches milestones 2 - 4, get ready to fill out the discretionary grant claim form.
- Go to the merSETA website on www.merseta.org.za and download the discretionary grant claim form.
- Open the discretionary grant claim form and completed the correct grants period i.e., 2017/2018 to 2020/2021 or 2021/2022 to 2023/2025.

Step 2 Capturing the required company and MoA information

Fill in the information as shown in the MOA and this includes:

- The employer name (*type in the white cell*).
- The levy number (*type in the white cell*).
- The MoA Value (*type in the white cell*).
- DG Financial Period as per MoA (*choose from a dropdown in blue cell*).
- MoA Start Date (*choose the date from a dropdown in blue cell*).
- MoA End Date (*choose the date from a dropdown in blue cell*).
- Regional Office (*choose the company location by region from a dropdown in blue cell*).

Step 3 Capturing the learner number for the interventions

Fill in the learner numbers as shown in the MoA, and this includes:

- Number of Learners Awarded per intervention (*type in the white cell*).
- Number of Learners Already Claimed per intervention (*type in the white cell*).
- Number of Learners on Current Claim (Fully funded) (*type in the white cell*).
- Number of Learners on Current Claim (Co-funded) (*type in the white cell*).
- The tranche that is claimed (*choose from a dropdown in blue cell*).
- Number of Disabled Learners Currently Claimed (*type in the white cell*).

Only fill out this section when submitting tranche 2 if the company is claiming a disability allowance, as it receives full payment during this phase.

Step 4 Verification of recorded information and sign off

- Where required provide comments or recommendations in the designated space (*type in the white cell*).
- Type in the name and surname of the company representative (*type in the white cell*).
- Type in the company representative capacity (position/role) (*type in the white cell*).
- Enter the date on which the form was completed (*choose the date from a dropdown in blue cell*).
- Verify the collected information to ensure its accuracy and alignment with the provided disclaimer (*refer to text in red*).
- Save the discretionary grant claim form as a portable document format (PDF).
- Print out the form for and sign off or attach an electronic signature (*type in the white cell*).

Step 5 Submission of the signed discretionary grant claim form

- To submit a claim, send an email to discretionarygrantclaims@merseta.org.za along with the fully completed and signed off discretionary grant claim form.

Step 6 Confirmation of Submission

- Once the discretionary grant claim form has been sent successfully, the sender will receive a confirmation email letting them know that it has been received.