



**merSETA**

MANUFACTURING, ENGINEERING  
AND RELATED SERVICES SETA

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## Six (6) Step Discretionary Grant Claim Form Guideline

### Step 1: Find the Discretionary Grant Claim Form.

- When the entity reaches milestones 1–4, get ready to fill out the discretionary grant claim form.
- Go to the merSETA website on [www.merseta.org.za](http://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 2023/2024 or 2024/2025 or 2025/2026

### 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](mailto:discretionarygrantclaims@merseta.org.za) along with the fully completed and signed off discretionary grant claim form and **Cc'd your designated CLO/CRM**.

**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.

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