**UNIVERSITY OF PRETORIA**

**APPLICATION FOR STUDY FINANCE (Bursaries & Loans) - 2025**

- **UP Bursaries and Loans:**
    - o Applications must be submitted through the UP Student Portal.
    - o Applications for 2025 open on 01 November 2024.
    - o For more information you can visit www.up.ac.za/feesfunding

- **NSFAS**:
    - o NSFAS applications are centralised with NSFAS.
    - o For application dates & information please visit www.nsfas.org.za

- **International Students**:
    - o International applications for 2025 will open in 06 January 2025.
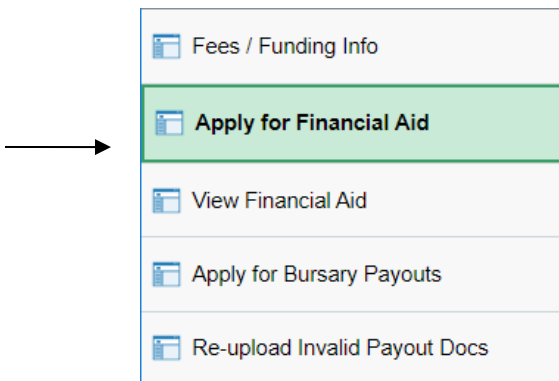
**HOW TO APPLY**

- Apply for Financial Aid via UP Student Portal, click on "**Student Centre"** tile



- Click on "**Fin Aid and Funding Opportunities**" tile



- Click **"Apply for Financial Aid"**

- Click **Add Application**

- Select "**YES – Create Application**" for the Financial Aid Type you want to apply for

- Select the row for **2025** in the Application Summary table and follow the pages to complete the form



- Read through the information on the Instructions page to understand how to apply and what you are agreeing to when you submit your application.

## How to complete the application and the information and documents required.

Click on the "Next" or "Previous" buttons to move between the screens. You must select or fill in the required field(s) on each page before you can go over to the next page.

For details/requirements for each bursary/loan click on the info icon next to the bursary/loan name. The specific bursaries have special criteria and therefore additional supporting documents will be required before submitting the application.

Detailed information of your parent(s)/legal guardian or you as an independent applicant and spouse(if married) must be completed before the supporting documents can be uploaded.

**Independent Applicant:** Select this option if you do not have parents or a legal guardian or are employed. You will need to upload proof of your income or means of survival. If you are married you will need to upload proof of your spouses income as well.

**Mother/Father:** Select both Mother and Father if your parents are married. You will need to upload proof of their income or no-income (if unemployed). If your parents are divorced or you only have a single parent then select the parent that supports you and upload their income plus (affidavit) proof of other income/maintenance from the other parent.

**Legal Guardian:** If you are in the care of a Legal Guardian then select this option and upload proof (affidavit by the guardian) of the monthly allowance that the guardian supports you with.

The proof of income (not older than three months) of your parent(s)/legal guardian/yourself if independent applicant and spouse (if you are married) listed below are required to process the application. To add more than one source of income (eg salary & maintenance) on the income page please add a new row by clicking +. Documents must be in .pdf format and individually uploaded according to the 'Document Details' on the last page of the completed application. Documents that are uploaded must **NOT** be password protected.

- Proof of basic gross salary- salary/pension advice(s).
- Bonuses/overtime to be excluded.
- Self-employed - latest financial statements as well as a confirmation letter from auditor/bookkeeper or affidavit stating gross monthly income/withdrawal from business. Tax certificates/bank statements are not acceptable.
- Commission only - proof of income for the past three months.
- Unemployed - individual affidavit/sworn statement per unemployed person signed by a judicial officer to declare the source of income/means of financial survival (maintenance/allowances/grants/contributions by family/friends).
- Divorced (Biological parents) - affidavit written by the parent confirming maintenance received/not received.
- Single or never married - affidavit written by the parent confirming maintenance/other financial assistance received/not received.
- House executives – affidavit written by the parent confirming any source of income/no income.
- Legal guardian must declare **monthly allowance made available to applicant** by means of an affidavit/sworn statement.

**This Financial Aid application process will also make use of a third party institution to verify your household income.**

## When submitting this application

The University will use your personal information for purposes of application and potentially awarding of funding.

When you apply for funding, we will use your information to:
- Verify the information you provide with external third parties to ensure the information is complete, accurate and not misleading;
- Use your ID number to verify with an external third party your household income for purposes of obtaining funding;
- For purposes of awarding funding, and in the event of successfully awarded funds:
  o Share your personal information with bursars / potential bursars;
  o Share your academic progress with bursars / potential bursars;
  o Share the status of your fees account with bursars / potential bursars.

If you are younger than 18 years, you must have your parent or guardian's permission to apply for funding through, or from, the University.

- After completion, select "AGREE" on the Consent page to agree that your information can be used as set out for the purpose of your application process and click "NEXT"

- A list of required documents will appear.  You must upload <u>ALL</u> of the required documents before you can submit the application for processing.   The documents must be in **.pdf format** and must <u style="color:red">**NOT be password protected**</u>.

- Click **Submit**

If you do not have the required documents immediately available you can save your application as draft and upload them at a later stage but you will not be able to submit your application for processing before they are **ALL** uploaded.

University staff will review submitted applications for the quality and classification of each uploaded document and either validate it or reject it.  You will be notified via an automated email if any document has been rejected.

You will then have to go to the "**Documents & Communications**" tile to view the rejected reason and document. Any new documents that must be uploaded can only be uploaded via the Documents & Communications tile once the application is submitted.

**For not yet submitted applications** - to upload documents at a later stage and submit your application you must:
- Navigate to your application and go "NEXT"  through each page to get to the last document page
- Upload the required documents
- Click **Submit**

**For already submitted applications** - if you need to upload additional, correct, replacement documents you must:
- Click on the "**Documents & Communications**" tile
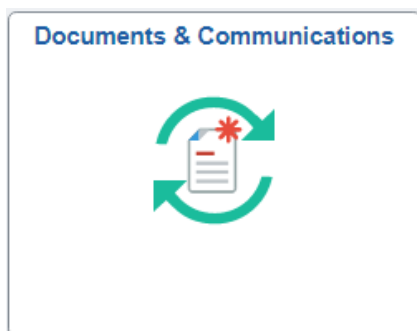
- Add a new row by clicking on the "+" in one of the rows



  - o select Financial Aid
  - o select the correct year for your application – eg 2025
  - o select the correct Doc type
  - o upload the .pdf document
  - o save

example of a new row added



**Documents listed below are required in support of the application.**
- Proof of Income (payslip / pension advices / audited financial statements) **not older than 3 months** for the working applicant / spouse / parents / legal guardian;
- If no proof of income or if unemployed, an affidavit per individual stating the source of income / maintenance / allowances;
- If the biological parents are divorced or the parent is single(never married) they must provide an affidavit stating maintenance;
- Payments for bonus / overtime must be excluded when the gross income is declared.

- Document must **NOT be password protected**. Your application cannot be processed and you will be requested to re-upload a non-password protected document.

**GUIDELINES FOR AFFIDAVITS & PROOF OF INCOME**

1. **Guidelines for affidavits**
   a) An affidavit is a sworn statement. The person making the statement takes an oath that the contents are, to the best of their knowledge, true before signing the affidavit. It is also signed by a notary public or some other judicial officer who can administer oaths, to confirm that the person signing the affidavit was under oath when doing so. These documents can carry considerable weight in a legal process.
   b) The biological/adoptive parents or legal guardian must write the affidavit. An affidavit made by the applicant (student) will not be accepted.
   c) The document must not be older than three (3) months.
   d) The following must be indicated:
      • The date and place where the affidavit was written
      • The relationship of the writer with the applicant (student)
         • How gross income is generated. Gross income is any money received and is not limited to remuneration earned from employment. It includes receipt of rental, interest, annuities, business income, etc. It excludes any deductions / expenses
      • The amount of money generated per month/year
      • Clearly state what portion of the gross income is utilised to support the applicant (student)

2. **Guidelines for payslips**
   a) Salary advice should not be older than three (3) months.
   b) Indicate payment period i.e. weekly/fortnight/monthly/annually.
   c) Tax certificates are not accepted.
   d) Bank Statements are not accepted

3. **Pensioners**
   a) Copies of the pension advice from social welfare or institution concerned must be submitted.
   b) The name, surname and ID number of the pensioner must be indicated on the pension slip.
   c) The pension advice should not be older than three (3) months.

4. **Self-employed & business owners**
   a) The latest audited financial statements must be provided;
   b) An affidavit stating gross income from business activities (only if audited statements are not available / self-employed)
   c) If commission only, proof of payments for the past three months or an affidavit to declare commission received for the past three (3) months must be provided.

5. **Unemployment Insurance Fund (UIF)**
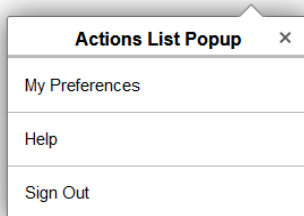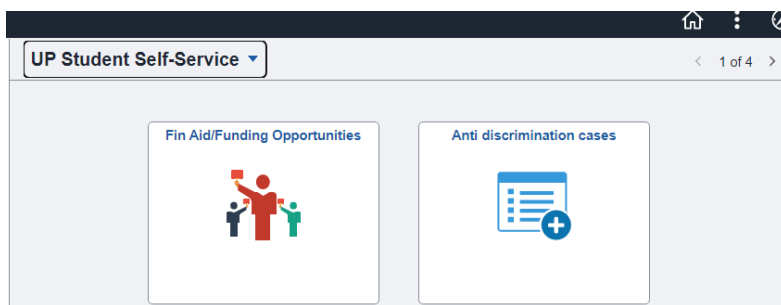   This is not accepted as a source of income.

   *We reserve the right to request any other financial information.*

**PROBLEM SOLVING:**

1. **If you are not getting a response when you click on the 2025 row then it is probably that you/your device changed some of your "My Preferences" in Peoplesoft.**

   - Sign onto PeopleSoft
   - On the right next to the house icon - click on those three dots
   - Then select My Preferences
   - Change Accessibility Layout - **must be Screen Reader Mode OFF** (yours is probably set to ON)







   - Sign out and then back in again and try again.

2. **If you are battling to upload a document or re-load a new document.**

   Make sure of the following:
   - the doc is a .pdf
   - there are no strange characters in the name  (% & # * etc)
   - there are no full stops "." in the name - eg T.M.banking.details.pdf    The ONLY . that may be in the name is between the name and .pdf
   - the name must not be too long.  Make it short. eg student number + bank  12345678_bank.pdf


   Please contact the Financial Aid office at the SSC for assistance.