

SUPPLEMENTARY BURSARY APPLICATION GUIDE

Submit your **Supplementary Bursary application successfully the first time**. The following table identifies how your application will be assessed, and what will qualify your application to be accepted, reopened, or deemed ineligible.

Requested Financial Support Documentation Provided

- ACCEPTED** All financial documents requested in the application are provided and include the following:
- All financial statements (bank accounts, credit card(s), line of credit, and assets) for the three to five months requested in the application. If the applicant is married or common law, their partner's financial statements must also be provided.
 - Financial statements provided in an acceptable format (example on page 3) with visible daily transactions and opening and closing balances.
 - Resources or expenses entered in the application match the deposits and withdrawals on financial statements (e.g. rent payment amounts entered in the application are clearly and regularly seen on bank statements).
 - Explanations for transactions in financial statements that are not educational or living-expense related.

- REOPENED** Not all financial documents requested in the application are provided.
Documents are submitted in an incorrect or unacceptable format.
Resources or expenses entered in the application do not match the deposits and withdrawals on financial statements (e.g. deposits on bank statements that do not match student loans or family support entered in the application).

- INELIGIBLE** All financial documents requested in the application have not been provided after the applicant has had at least one additional opportunity to submit them.

Proof of Funding Received / Expected

- ACCEPTED** Government Student Loan confirmed funding letters are provided (e.g. Notice of Award Letter).
Documentation is provided of other funding supports (e.g. parental support, RESPs, sponsorships, awards or scholarships not from the University of Alberta, etc.).
- Graduate Students:**
Include department pay documents for the current academic year for a minimum of eight months from September to April, or September to August if twelve months has been confirmed.

- REOPENED** Deposits are visible in financial statements but no document or explanation is provided to confirm the funding sources.
- Domestic Students:**
The applicant has unconfirmed or no Government Student Loans at the time of application. Please note, some exceptions are in place for Indigenous applicants.
The applicant received less than the yearly maximum amount of student loan funding available.
- Graduate Students:**
Department pay documents do not report a minimum of eight months of funding support.

- INELIGIBLE** No demonstration of accessing funding supports for the current academic year.

Demonstrated Moderate Standard of Living

(Based on Alberta Student Aid Education and Living Costs)

ACCEPTED	Application and financial statements demonstrate a Moderate Standard of Living. Any additional monthly or yearly expenses include supporting documentation (e.g. dietary requirements, child care, medical costs, etc.).
REOPENED	Application and financial statements demonstrate greater than Moderate Standard of Living expenses and no supporting information for additional costs have been included in the application.
INELIGIBLE	No shortfall is demonstrated in the application after additional costs have been evaluated and a Moderate Standard of Living is applied to living expenses.

Explanation of Financial Situation

ACCEPTED	Essay description is detailed and documents (if applicable) are provided to support the financial shortfall situation.
REOPENED	Essay description is unclear or vague and/or additional supporting documentation is required.
INELIGIBLE	No essay explanation and/or no documentation provided to support the financial shortfall situation.

Explanation of Deviation from Financial Plan for the Duration of Studies

(Specific to International Undergraduate and Graduate Students)

ACCEPTED	Description explains the original financial plan to pay for all educational and living costs for the duration of the program of studies and what changed from the original plan that is causing a shortfall of funds. Applicable documents are provided to verify any extenuating circumstances that affected the original financial plan. <i>Note: International undergraduate students must also provide a detailed letter from parents/sponsors confirming the original financial support plan, what is being provided for the current academic year, and why full support is no longer being provided.</i>
REOPENED	Description is incomplete and/or does not verify what has changed from the original plan or what extenuating circumstances were present.
INELIGIBLE	Description and/or requested documents are not provided.

FINANCIAL STATEMENT CHECKLIST

Avoid having your application reopened due to an incomplete bank statement. Below is a checklist of things we look for when assessing a bank statement. Make sure you can check off each one before submitting.

- Is my statement from an official source?
- Does my statement display my full first and last name?
- Is my statement showing a full month of transactions?
- Does my statement show running account balances?
- Does my statement clearly show my payment of rent?
- Are any unclear transactions (transactions without a description) labelled?

SAMPLE BANK STATEMENT

Below is an example of a bank statement that meets all the criteria highlighted on page 2. Can you identify each one?

DAY-TO-DAY BANKING

JOHN DOE
9999 100-100 Street
Albertaton, AB T9T 9N9

Your account number:
91091 09109 10

YOUR ACCOUNT SUMMARY

Opening Balance on September 1, 2019	\$2,953.17
Minus total withdrawals	\$4,535.07
Plus total deposits	\$2,503.69
Closing Balance on September 30, 2019	\$921.79

DATE	TRANSACTIONS	AMOUNTS WITHDRAWN (\$)	AMOUNTS DEPOSITED (\$)	BALANCE (\$)
Sep 1	Opening Balance			2,953.17
Sep 1	Point of sale purchase Fpos Subway #22085 Edmonton ABCD	10.92		2,942.25
Sep 1	Withdrawal 55468524 MB-Email Money Trf George Smith	650.00		2,292.25
Sep 7	Point of sale purchase Fpos Safeway Garneau	73.84		2,218.41
Sep 9	ATM Withdrawal	120.00		2,098.41
Sep 14	Deposit 22514963 MB-Email Money Trf		300.00	2,398.41
Sep 15	Payroll dep. Rexall Pharma Plus		114.12	2,512.53
Sep 18	Point of sale purchase Fpos Safeway Garneau	123.63		2,388.90
Sep 19	Point of sale purchase Fpos Earls	22.84		2,366.06
Sep 21	EPCOR	49.84		2,316.22
Sep 24	Deposit 45831389 PC-Email Money Trf		2,000.00	4,316.22
Sep 25	University of Alberta	3484.00		832.22
Sep 29	Payroll dep. Rexall Pharma Plus		89.57	921.79
Sep 30	Closing Balance			921.79

BANK

QUESTIONS?
Call 1 800 800-8000

FOR ONLINE ACCOUNT ACCESS:
www.bank.com

Rent to my landlord

For food

From my roommate for groceries

From my parents for tuition help

Paying my tuition