

# PN1 Notes


## Notes to help you complete your Application for Student Finance 2011/12


You can also apply online at [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)

**StudentFinancenl is a partnership between the Education and Library Boards (ELBs) and Student Loans Company (SLC) for delivering financial support to students on behalf of the Department for Employment and Learning (DEL) Northern Ireland.**

You should **not** be completing the PN1 form if any of the following apply to you:

- You normally live in Wales, Scotland, England, the Channel Islands or the Isle of Man, but you have moved or will be moving to Northern Ireland to attend this course. If this is the case, you should contact whichever of the following organisations is relevant:
  - Your Local Authority (LA) in Wales
  - The Student Awards Agency for Scotland (SAAS)
  - Student Finance England (SFE)
  - The Education Department of Guernsey or Jersey
  - The Education Department for the Isle of Man
- You are studying on a distance learning course for a reason which is not related to a disability. If this is the case, you should instead complete a PTG1 form to apply for student finance. The PTG1 form will be available from August 2011.
- You are a national of a European Union Member State and you have moved to Northern Ireland to attend a higher education course. If this is the case, you should contact the EU Customer Services Team at: PO Box 89, Darlington, County Durham, England, United Kingdom DL1 9AZ. Phone: 0141 243 3570.
- You are, or will be attending a part-time higher education course other than for Initial Teacher Training (ITT). In some circumstances, you may qualify for help if you are taking a part-time course. For more information you should phone our Customer Support Office on 0845 600 0662.
- You will be starting a course in a health related discipline and be eligible to apply for a bursary from the National Health Service (NHS), the Scottish Government Health Directorate or Department of Health, Social Services and Public Safety (DHSS&PS) which is not assessed on your household income, excluding the social work bursary.

You must use these notes whenever you see this icon within the main PN1 form. 

Any evidence that you are required to provide is also outlined in these notes and is marked with this icon. 

Wherever you see this evidence icon on the PN1 form, you should check these notes for information on the evidence required.

## section 1 finance available

### Maintenance Grant **NOT REPAYABLE**

You will not be eligible for a Maintenance Grant if you are eligible to receive a Special Support Grant.

The amount of Maintenance Grant you receive will affect the amount of Maintenance Loan you are entitled to and is dependent on your household income.

If you will be studying on a postgraduate Initial Teacher Training (ITT) course of a year or more and choose not to provide any financial information you will be eligible to receive £1,318 Maintenance Grant (£659 for part time ITT students). If you choose to provide financial information then you may be eligible to receive up to £3,475 Maintenance Grant (£1,738 for part-time ITT students).

### Special Support Grant **NOT REPAYABLE**

If you are eligible to receive a Special Support Grant you will not be eligible to receive a Maintenance Grant.

You may be able to receive a Special Support Grant if you:

- Are a lone parent.
- Have a partner who is also a student and one or both of you is responsible for a child or young person aged under 20 who is in full-time education below higher education level.
- Have a disability, and qualify for the Disability Premium or Severe Disability Premium.
- Are deaf and qualify for Disabled Students' Allowances.
- Have been treated as incapable of work for a continuous period of at least 28 weeks.
- Have a disability and qualify for income-related Employment and Support Allowance.
- Are from abroad and are entitled to an Income Support Urgent Cases Payment because you are temporarily without funds for a period of up to six weeks.
- Are waiting to go back to a course having taken agreed time out from that course due to an illness or caring responsibility that has now ended (this does not mean that you will be paid for time you were not on your course).
- Are aged 60 or over.

 **Please state on a separate piece of paper which of the above categories you think you may fall into and enclose this, and relevant supporting evidence, with the PN1 form.**

The Special Support Grant pays up to £3,475, depending on your household income, and is intended to help with additional course-related costs such as books, equipment, travel or childcare. We calculate your entitlement the same way as the Maintenance Grant. The Special Support Grant does not affect the amount of Maintenance Loan you may be entitled to receive. The Social Security Agency will not take account of the Special Support Grant when assessing any claim you make for income related benefits.

### Maintenance Loan **REPAYABLE**

You may not be eligible for a Maintenance Loan if you already hold a UK/ROI honours degree unless you are taking a particular vocational degree.

If you are assessed as being eligible to receive the Maintenance Grant then the amount of Maintenance Loan available may be reduced.

## section 1 finance available

### Tuition Fee Loan **REPAYABLE**

You may not be eligible for a Tuition Fee Loan if you already hold a UK/ROI honours degree. If you are undertaking a course at a university or college in Northern Ireland, England or Wales that is charging variable or flexible tuition fees up to a maximum of £3,375, you will be able to take out a Tuition Fee Loan to cover some or all of these fees (depending on how much you are charged and how much you wish to borrow).

If you are undertaking a course at a university or college in Northern Ireland, England or Wales that is not charging variable or flexible tuition fees then the tuition fee chargeable could be any amount up to a maximum of £1,345 and you can apply for a Tuition Fee Loan to cover this cost.

If you are undertaking a course at a university or college in Scotland you can apply for a Tuition Fee Loan to cover the amount of tuition fees that your university or college will charge you, up to a maximum of £3,375.

If you are undertaking a course at a university or college in the Republic of Ireland you will not have to pay any tuition fees and therefore you are not entitled to a Tuition Fee Loan. Instead, the university or college will charge a registration fee and your Education and Library Board will cover this cost.

If you are undertaking a course at a private university or college then you may be charged more than £3,375 for tuition fees but you can still only apply for a Tuition Fee Loan up to the maximum of £3,375 if your course is one that qualifies for tuition fee support.

If you are continuing on a course at a private university or college that you started before academic year 2006/07 and this is your first application for student finance, you will not be able to take out a Tuition Fee Loan; you may instead be able to take out a Grant for Tuition Fees.

The Tuition Fee Loan borrowed will be paid directly to the relevant university or college once your attendance is confirmed.

### Adult Dependants' Grant **NOT REPAYABLE**

This grant is dependent on your income and any income of your dependants. You can only apply for this grant if you are married, in a civil partnership, are living with a partner of either sex or have another adult dependant. You can only apply for this grant for one adult dependant; if you have more than one adult dependant, you can still only receive one grant.

### Parents' Learning Allowance **NOT REPAYABLE**

The amount you receive depends on your income and that of your dependants (including your husband, wife or partner). It is not counted by the Social Security Agency or housing benefit departments when calculating your other benefits, so you do not have to choose between Parents' Learning Allowance and other benefits.

### Bursaries and Scholarships **NOT REPAYABLE**

Universities and colleges in England, Wales and Northern Ireland must offer you a mandatory bursary if you are assessed as being eligible to receive either the full Maintenance Grant or full Special Support Grant and the university or college is charging the maximum variable or flexible fee rate.

Some universities and colleges may choose to offer discretionary bursaries or scholarships. The amount offered would be at their discretion and you may not need to be eligible for the full Maintenance Grant or the full Special Support Grant to qualify for their bursary or scholarship scheme.

## section 1 finance available

### Travel Grant **NOT REPAYABLE**

If you have to study at a university or college outside the UK/ROI for the majority of any term in the academic year or if you have to attend a place in the UK/ROI away from your main college or university as part of your medical or dental training, you may be eligible for help with the cost of travel. You may also be able to get help to cover the cost of the medical insurance, visa costs and vaccinations. The support you receive is dependent on your household income.

If you have extra travel costs because you are disabled or have a specific learning difficulty, apply for Disabled Students' Allowances instead.

You will be sent further forms to complete about your travel costs.

### Childcare Grant **NOT REPAYABLE**

You may get help with some of your childcare costs, depending on your income and any income of your dependants, if you have dependent children aged under 15 at the beginning of the academic year - or under 17, if they have special educational needs - and you need childcare services for them. You may be able to get help with childcare costs during vacations as well as during term-time. Your childcare provider must be registered or approved for you to receive this grant. You cannot have this grant if you or your partner receives the childcare element of Working Tax Credit; you have to choose one or the other.

You will be sent more information about the Childcare Grant and further forms to complete about your weekly childcare costs.

### Disabled Students' Allowances **NOT REPAYABLE**

These can help pay for extra course-related costs you may have as a result of your disability or specific learning difficulty. This includes special equipment, a non-medical helper or special travel arrangements.

**e** If you provide evidence of your disability such as a letter from your doctor, or if you have a specific learning disability, a diagnostic assessment carried out by a suitably qualified person, this will help us process your application more quickly. If you do not have this evidence yet, send this form to us now and send in the evidence of your disability or specific learning difficulty later. We will contact you to ask for the extra information we need.

**e** If you are taking your course by distance learning or otherwise undertaking but not attending a course in person for a reason which relates to your disability you can apply for all types of student finance (except Travel Grant) as if you were attending in person. The evidence you send must show that you are unable to attend university or college in person for a reason which relates to your disability.

If you want to apply for DSAs only, you should complete sections 2-5 of this form and return it to us. We will then send you another form that asks more specific questions about your disability/ specific learning difficulty. Alternatively, if you want to send us all the details in one go you should complete a full DSA1 form instead of this form. You can download a full DSA1 application form at [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk).

You can also find more information in the following guides which are available on our website at [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)

- **A guide to financial support for higher education students in 2011/2012**
- **Student Loans: A guide to terms and conditions**
- **Bridging the Gap: A guide to the Disabled Students' Allowances (DSAs) in higher education 2011/2012**
- **Childcare Grant and other support for full-time student parents in higher education 2011/2012**

You can order forms and guides in Braille, large print or audio by emailing with your name, address, customer reference number along with what form and format you require to:

**[brailleandlargefonts@slc.co.uk](mailto:brailleandlargefonts@slc.co.uk)**

or you can telephone us on **0141 243 3686**

Please note, the above email address and telephone number can only deal with requests for alternative formats of forms and guides.

## section 2 personal details

### Personal details

#### a You must send your original passport, birth certificate or adoption certificate with your application form.

**e** If you choose to send your original birth certificate (this would include a UK birth certificate issued by a British Consulate abroad) or original adoption certificate it must be accompanied by a completed Birth/Adoption Certificate form.

- If you are still at school a shorter version of the form will be available from your school. This form should be completed by your teacher.
- If you have left school you must complete the full form which contains two separate declarations. The Declaration of Identity must be signed by yourself to confirm your identity. The Identity Confirmation is to verify your identity and must be completed by a person of good standing in the community (for example, a teacher, solicitor, civil servant or police officer) who has known you for at least two years.

You can download a Birth/Adoption Certificate form at [www.studentfinancenl.co.uk/forms](http://www.studentfinancenl.co.uk/forms). Alternatively, contact our Customer Support Office and they will arrange to have one sent to you.

If your name has changed from the name that appears on your birth certificate or passport - please send the relevant evidence confirming this and give details of any previous names you have had in the Additional notes section at the back of the PN1 form.

#### Your documents will be returned to you as soon as possible.

If you have lost your birth certificate you should get a replacement by contacting the Register Office in the sub-district where your birth was registered. If you do not know where this sub-district is, you should contact the general register office at one of the following addresses:

- If you were born in England or Wales: Certificate Services Section, General Register Office, PO Box 2, Southport, PR8 2JD, Tel: 0845 603 7788.
- If you were born in Scotland: General Register Office for Scotland, New Register House, Edinburgh, EH1 3YT, Tel: 0131 314 4411.
- If you were born in Northern Ireland: General Register Office, Oxford House, 49-55 Chichester Street, Belfast, BT1 4HL, Tel: 028 9025 2000.

#### DO NOT send your application form to any of the above addresses.

### Previous loans

#### b If you are behind with repayments on a previous loan, you should not apply for student finance until you have resolved this issue.

If you have any mortgage style loans please call 0845 073 8896 for advice.

If you have any Income Contingent Repayment (ICR) loans, please call 0845 073 8891 for advice.

### Contact details

#### d If you provide a term-time correspondence address then all correspondence we issue will be sent to that address from the date you move there.

### Marital status

#### e You are 'living with a partner' if you are sharing a home with your partner but you are not married or in a civil partnership. It does not matter whether you are of the same sex or of opposite sex.

**e** If you will be under 25 at the start of the academic year, and you are married or in a civil partnership, please send your original marriage certificate or civil partnership documentation with the application. Your document will be returned to you.

**e** If you are divorced or separated, or if you have been in a civil partnership which has been dissolved, you should send a copy of the decree absolute, dissolution order, or a letter from your solicitor confirming your status. Any original documents will be returned to you.

**e** If you are widowed or a surviving civil partner, please send the original death certificate.

## section 3 residence

### Nationality

- a1** If you answer 'Yes' to this question, you must send your passport or birth certificate as evidence of your nationality. If you were born outside the UK and have a British birth certificate issued by a British Consulate, send this instead of your passport, a letter or other document.
- a2** If you answer 'Yes' to this question, you must send your passport or national identity card as evidence of your EU nationality.
- a3** If you answer 'Yes' to this question, you must provide evidence to confirm that your parent is a Swiss national and that you are their child by sending your parent's passport or national identity card (if these show proof of their Swiss nationality and your relationship to them).

### Residence status

- a4** The EEA or Swiss national must provide proof of their nationality with their passport or national identity card.

As proof of the current employment status of the EEA or Swiss national who is working, has worked or is looking for work, one of the following must be provided as evidence:

- A P60 or a letter from employer if currently working.
- Audited accounts, tax returns or details of income if self-employed.
- A letter from employer confirming the intention to continue working whilst studying.
- P45, P60 or letter from previous employer if currently looking for work or previously worked in the UK.

If your child, son or daughter-in-law or child's civil partner is the worker you must be dependent on them.

For children of EEA workers the term 'child' means a person "under the age of 21; or dependants of the person or the person's spouse or civil partner." This does not apply in cases where the EEA worker parent has died or left the UK and the child is staying on in the UK to finish their education.

- a5** 'Settled status' means that you can live in the UK permanently without the Home Office placing any restrictions on how long you may remain.

You are free from any restriction if any of the following apply:

- You are a British citizen.
- You have a right of 'permanent residence' in the UK.
- You have been granted 'indefinite leave to remain'.
- You have a right of abode in the UK.

Further information about the right of permanent residence and other immigration issues can be obtained from the UK Border Agency at the Home Office at [www.ukba.homeoffice.gov.uk](http://www.ukba.homeoffice.gov.uk).

- e** If you do not have a British Passport which confirms your immigration status, but you have a letter from the Home Office which does, please send this letter with your application form.

### a6 Refugee status

If you or your:

- husband, wife, civil partner; or
- parent(s), step-parent

have successfully applied for refugee status in the UK under the terms of the 1951 United Nations Convention on Refugees, and you or they have been granted refugee status, the Home Office will have sent you or them a letter and an immigration status document confirming this.

## section 3 residence

**e** Please send the Home Office letter and immigration status document, normally a passport, of the person who holds refugee status. You should also send evidence of your relationship to the person who holds refugee status if it is not you.

If you are claiming student finance as the child or step-child of a refugee, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming student finance as the husband, wife or civil partner of a refugee, you must have been their husband, wife or civil partner at the time of their application for asylum.

### Expiry date

If you or your

- husband, wife, civil partner; or
- parent(s), step-parent

were granted refugee status without an expiry date you should mark the expiry date box as N/A (not applicable).

### a7 Leave to enter or remain

If you or your:

- husband, wife, civil partner; or
- parent(s), step-parent

have been granted 'leave to enter or remain' in the UK as the result of an unsuccessful asylum application, the Home Office will have sent you or them a letter and an immigration status document confirming this.

**e** Please send the Home Office letter and immigration status document, normally a passport, of the person who has been granted leave to enter or remain. You should also send evidence of your relationship to the person who has been granted leave to enter or remain if it is not you.

If you are claiming student finance as the child or step-child of a person granted leave to enter or remain, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming student finance as the husband, wife or civil partner of someone who has been granted leave to enter or remain, you must have been their husband, wife or civil partner at the time of their application for asylum.

## Residence history

### b2 Date study begins between

- 1 August 2011 until 31 December 2011 inclusive
- 1 January 2012 until 31 March 2012 inclusive
- 1 April 2012 until 30 June 2012 inclusive
- 1 July 2012 until 31 July 2012 inclusive

### Date academic year begins

- 1 September 2011
- 1 January 2012
- 1 April 2012
- 1 July 2012

## section 4 about your course and your university or college

### Course details

- b** If you are unsure about the tuition fee amount you will be charged, please contact your university or college for clarification.

### Course type

**c Full-time undergraduate course**

For these courses you will attend university or college on most days of the week and for most weeks of the year (apart from weekends and the usual holidays). You must attend the course for at least 24 weeks in the academic year, unless it is the last academic year of the course, in which case you must attend for at least eight weeks. The course must also last for at least one academic year.

### Flexible postgraduate ITT course

The amount of financial support you can receive for this type of course depends on the length of the course and the number of weeks you will be in full-time study and full-time teaching practice. The tables below show what you may be entitled to.

<b>Period of full-time study during the academic year</b>	Less than 10 weeks	Tuition Fee Loan of up to £1,680
	10 or more weeks	Tuition Fee Loan of up to £3,375
<b>Period of combined full-time study and full-time teaching practice during the academic year</b>	<b>Length of course</b>	
	Less than 1 academic year	1 or more academic years
Less than 6 weeks	No maintenance support	Reduced Maintenance Loan
6 to less than 10 weeks	No maintenance support	Reduced Maintenance Grant Full Maintenance Loan
10 or more weeks	No maintenance support	Full Maintenance Grant Full Maintenance Loan

- e** You will need to provide a letter from your university or college confirming the number of weeks you will be attending your course full-time and the number of weeks you will be on full-time teaching practice.

**e Part-time undergraduate ITT course**

You will need to provide a letter from your university or college confirming the number of weeks you will be attending your course full-time and the number of weeks you will be on full-time teaching practice.

### Part-time ITT course (excluding first degrees)

A part-time undergraduate ITT course is a first degree course. If you are applying for support for a part-time PGCE, part-time Certificate in Education (CertEd) or part-time Diploma in Teaching in the Lifelong Learning Sector (DTLLS) or equivalent course, please tick the 'Part-time ITT' box.

- e** You will need to provide a letter from your university or college confirming the number of weeks you will be attending your course full-time and the number of weeks you will be on full-time teaching practice.

### Full-time postgraduate Initial Teacher Training (ITT) course

For these courses you must attend full-time, for either study or teaching practice, for an aggregate of at least six weeks in the year. If your periods of full-time study including teaching practice amount to less than six weeks, you will not be eligible for Maintenance Grants, but you may be able to receive reduced rate non-income assessed Maintenance and Tuition Fee Loans. You will still be considered to be attending your course even if arrangements have been made by your university or college for you to take the course without having to attend.

**e Full-time distance learning**

If you are studying on a full-time distance learning course for a reason relating to a disability you must send evidence that clearly shows you are unable to attend university or college in person for a reason which relates to your disability.

## section 4 about your course and your university or college

### Full-time foundation degree

Foundation degrees are employment-related higher education qualifications designed to give you the skills needed at the relevant professional and higher technician level. They are designed to be flexible to suit different situations, and you can complete foundation degrees in two years if you study full-time.

### Full-time course involving a placement ('sandwich' course)

This kind of course includes full-time education at the university or college, plus periods of industrial or work placement.

- d** Please send the official letter indicating that you have been offered a state-funded place on a dance and drama course at a privately funded institution.

### **e** Term details

- e** Do not count any period spent studying in the Republic of Ireland as a term abroad.

If you study abroad we will send you additional forms separately. You will need to complete those forms with your study abroad and travel details.

### Placement details

- g** Do not count any placement in the Republic of Ireland as abroad.

If your placement is an unpaid placement that is not listed then you will only be entitled to a reduced rate of Maintenance Loan.

## section 5 previous financial support and other information

### Previous study

If you have a Dip HE, HND or similar qualification and progress to year one of a degree course you may not be eligible for fee and grant support for the first year of that course.

- a1** This includes any undergraduate or postgraduate course you have attended whether it was in the UK or overseas. Examples of undergraduate higher education courses you should tell us about include:

- DipHE, HND Degree and Foundation Degree, and similar courses from outside the UK.
- Integrated Masters Degrees.

This does not include any stand-alone postgraduate qualifications (e.g PgDip, MA, MSc, MBA or equivalents).

- a3** If you are unsure of the level of your existing qualification, please contact your university or college where you completed the course, which may be able to help.
- a4** A self-funded course is one that was studied at a private university or college and no support of any kind was paid either to you or the university or college to meet tuition fee or maintenance costs for the duration of the course.

- e** Evidence that supports compelling personal reasons for not achieving a qualification.

- b** If you are eligible to apply for a social work bursary from the Social Services Inspectorate you should answer 'No' to this question because this is a separate bursary to those offered by the NHS or the DHSS&PS.

Students studying an Allied Health Profession course at the University of Ulster or students who have reached the fifth year of study of a medical or dental course will have the DHSS&PS bursary entitlement assessed by their ELB using the information provided on the PN1 form.

If you are eligible to apply for an **income assessed** bursary or award, the only element of student finance you are eligible to apply for is the non-income assessed part of the Maintenance Loan and this will be at a reduced rate.

If you are eligible to apply for a **non-income assessed** bursary - you are **not** eligible for any other student finance. The only exception would be if you are a seconded student studying a health related course and you have been advised that you cannot apply for any bursary at all, either income or non-income assessed.

Contact your ELB if you are unsure how to apply for a bursary.

## section 6 your bank or building society account details

Payments will be made directly into the bank or building society account that you have given. If the account is a building society account, you should check whether you also need to give a roll number. The account must be in the UK and be able to accept payments by direct credit (check with your bank or building society if you are not sure about this). We cannot pay your Maintenance Loan, bursary (if applicable) or any grants to someone else for you.

You do not need to provide your bank or building society account details if you are only applying for a Tuition Fee Loan because this will be paid directly to your university or college and not to you.

## loan request section

### National Insurance Number

If you do not provide your National Insurance Number, payment of your loan(s) will be withheld and you will have to fund your own tuition fees and living costs until you have resolved this issue.

You will find your National Insurance Number on any of the following:

- Your National Insurance Number card.
- A payslip.
- An income tax document such as a P45 or P60.

If you have never been given a National Insurance Number, you should leave the National Insurance Number box blank. You will be contacted if you need to take any action to obtain a National Insurance Number.

### Maintenance Loan

This loan is paid in instalments directly to you and is to help cover your living costs throughout the academic year.

### Tuition Fee Loan

This loan is paid directly to your university or college once they confirm your attendance on the course.

### Applying for a loan at a later date or changing the amount requested

You can apply for a Maintenance Loan or a Tuition Fee Loan at any time in the academic year provided you are within the time limit. The time limit for applying is usually nine months from the start of your academic year.

You can apply for a Maintenance Loan or a Tuition Fee Loan, or change the amount you originally requested at [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk) or contact our Customer Support Office on 0845 600 0662 to have one sent to you.

## section 7 dependent and independent students

**a3** Having the care of a person under the age of 18 means that you look after a child and the child lives with you, irrespective of your relationship with the child.

**e** Please send the child's/children's original birth certificates and evidence that you have care of the child, for example, evidence that you are receiving Child Benefit or Child Tax Credit.

### **b Irreconcilable estrangement**

You will normally only be considered irreconcilably estranged from your parents if you have had no contact with them for at least a year prior to the start of your academic year.

You will not be able to claim irreconcilable estrangement just because:

- you do not get on with your parents;
- you do not live with them;
- your parents do not want to give details of their income; or
- your parents choose not to provide you with financial support.

### **In the legal care of a Local Authority**

If you have at any point been in the custody or care of a local authority but have been back in the legal care of your parents at any time since then, you will not be considered independent.

**c** To be considered as supporting yourself financially you must have been meeting your own living costs for at least 3 years (this does not have to be 3 consecutive years) from any of the following sources:

- Income from employment.
- Benefits.
- State studentships.
- scholarships, exhibitions and bursaries.

You would not be considered as supporting yourself financially if you are meeting living costs from money paid by a parent.

**e** Please send evidence that you have been supporting yourself financially such as P60s or benefit information.

## section 8 student financial details

### Unearned income

- a** You may be asked to confirm any estimated income at a later date.

If your actual income is different from your estimated income we will reassess your entitlement to student finance. This may change the level of financial support you receive.

When working out your taxable unearned income, you should **not** include:

- **earnings from full or part-time work** such as vacation work or work you do during term-time;
- any Maintenance Loan or grant payments you may receive;
- payments you receive from your parents under a covenant;
- maintenance payments you expect to receive for your children. These maintenance payments should be included as part of your children's income in question 8d;
- Teacher Training Bursaries;
- Care Leavers' Bursary;
- bounties paid by the armed services to reservists or disablement or invalidity pensions; or
- ISAs.

### Payments from an employer

- b** You should **only** provide an amount here if you are being released from employment by your employer to attend your course. If this is the case, you should only include salary or wages that you will receive from that employer for days you are actually attending your course and have been released from your employment to do so. Any earnings from salary or wages entered here may affect your student finance entitlement.

**Do not** provide any amount here if you are a student who is working while studying but have not been specifically released by your employer to attend your course.

### Dependent children

- d** You must include any income the child receives from working, from interest earned on savings, from investments and from any maintenance payments you expect to receive for your children as part of **their** income in this question.

- e** You must send your child's/children's original birth certificate(s).

## section 9 Parents' Learning Allowance, Adult Dependants' Grant and Childcare Grant

- c** The academic year is determined by when you begin your study, see page 25 for the dates.
- d** Fostering or boarding out allowances are regular payments that foster carers receive to meet the costs of keeping a child.
- e** Financial commitments to include would be insurance policies such as household or medical insurance, life assurance premiums, mortgage repayments or maintenance payments for a dependant. You should only include details of commitments which you, the student were paying before you started your course as only your commitments can be allowed. You must send evidence of any obligations you declare.  
The academic year is determined by when you begin your study, see page 25 for the dates.
- f** If you apply for Childcare Grant or you choose to receive Childcare Grant instead of the childcare element of Working Tax Credit you will be sent a further form to complete and an information booklet outlining the amount of Childcare Grant available. You can get information on all aspects of Working Tax Credit from the HM Revenue & Customs (HMRC) helpline on 0845 603 2000.

## section 10 about your family

### Independent students

For the purpose of income assessment, if you are an independent student, only your partner, if you have one, counts.

If you entered higher education **on or after 1 September 2005**, your partner is defined as:

- Your husband, wife or civil partner.
- Your opposite or same sex partner, if you are 25 or over and you live with your partner as though you were married or in a civil partnership.

**If you do not have a partner as defined above we will only assess your income.**

### Dependent students

If you are a dependent student, the following family members count for the purpose of income assessment:

- Your natural or adoptive parents, if both of them live with you.
- Your parent and their partner, if they have one.

If you entered higher education **on or after 1 September 2005**, your parent's partner is defined as:

- Your stepmother or stepfather.
- Your parent's opposite or same sex partner if they live together as though they were married or in a civil partnership.

If you entered higher education **on or after 1 September 2004 but before 1 September 2005** your parent's partner is defined as:

- Your stepmother or stepfather; or
- Your parent's opposite sex partner if they live together as though they were married.

- b** If your parents are divorced or separated, or if they have been in a civil partnership which has been dissolved, you should send a copy of the decree absolute, dissolution order, or a letter from their solicitor confirming their status.

## Student Declaration

If you cannot sign the form it must be signed on your behalf by your Power of Attorney. The Power of Attorney letter must be sent with the application before a signature from that Power of Attorney will be accepted.

## Data Protection Act 1998

The Student Loans Company (SLC) is a Data Controller under the Data Protection Act 1998. We hold information for the purposes specified in our notification to the Information Commissioner including determining eligibility for student finance, assessing the maximum amount of financial support available, payment of student finance and the detection and prevention of fraud, and may use this information for any of these. The Department for Employment and Learning is a joint Data Controller for your information. If false or inaccurate information is provided and fraud is identified, details may be passed to fraud prevention agencies to prevent fraud and money laundering. We may share the information you have given us with other organisations including the Department for Employment and Learning, other Government bodies and with the university or college for these purposes. We may also get information about you from other organisations. If so, it will only be for the purposes described and as the law permits us to do. For more detailed information about with whom we share your information and for what purpose, go to **[www.studentfinancenl.co.uk/dataprotection](http://www.studentfinancenl.co.uk/dataprotection)**.

### Changes of circumstance

You must notify your ELB about any change in your circumstances which may affect your entitlement to financial support.

The most common changes of circumstance for students would be if:

- you are absent from the course for more than 60 days because of illness;
- you are absent for any other reason;
- you leave, abandon or are expelled from the course;
- you stop attending the course and do not intend, or are not allowed, to return for the rest of the academic year;
- you transfer to a different course at the same, or a different, university or college;
- you transfer from a full-time to a part-time course;
- you repeat part or all of a year of your course; or
- the date of the start or end of your course changes.

The quickest and easiest way to tell us about any changes you've had to your name or address, your course or university or even your course fee amount is online. Just log into your account at **[www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)**.

### Information about data sharing for bursary and scholarship purposes

Universities and colleges will be offering financial awards such as bursaries or scholarships to their students. To help them administer these awards (i.e. to determine eligibility and entitlement to, and if relevant pay, a bursary or scholarship - 'bursary administration purposes') they will ask the Department for Employment and Learning, your Education and Library board or Student Loans Company for access to information you provide in connection with this application for student finance (whether on this form or at a later date).

We will share the relevant information with them, unless you indicate that you do not wish us to do so by ticking the box on the declaration. If you **do not** give consent for us to share this information, the payment of any bursary or scholarship to which you may be entitled will be delayed.

Please contact the university or college if you require further information about their bursaries and scholarships.

## section 11 financial details for the tax year 2009-10 for parents and partners

### What happens if my household income has changed since tax year 2009-10?

If your total household income (before tax) for the tax year 2011-12 will be at least 5% less than it was in tax year 2009-10, still complete this section as well as completing a 'Current Year Income Assessment Form'.

You can download this form at [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk) and return it with this application or contact us on 0845 600 0662 to have one sent to you.



Please note that a current year income assessment cannot be carried out unless you provide your financial details and evidence for the 2009-10 tax year.

### Part B - Your financial information

Please give evidence for the tax year 2009-10. Normally, this is the year ending 5 April 2010, but may differ if your employer or business has a tax year which does not end in April.

For any income paid in a foreign currency, please state the equivalent in pounds sterling.

#### Q3 Income from salary, wages, taxable state benefits or from occupational or private pensions

##### a Total income from salary / wages

If as part of your salary or wages for the tax year 2009-10 you received **tips and other payments** that did not show on your P60, you still need to include this figure when providing your total income amount earned from employment. If you declared this type of income to HM Revenue and Customs you would have done so by completing Box 3 on Page E1 for the 2009-10 SA102 (Employment) Form.

##### b Taxable state benefits

Only include income received for the following benefits:

- Bereavement Allowance
- Carer's Allowance
- Contribution based Employment and Support Allowance
- Graduated retirement benefit
- Incapacity Benefit (only include the amount received after 28 weeks of incapacity)
- Industrial Death Benefit
- Jobseekers Allowance
- Statutory Adoption Pay
- Statutory Maternity Pay
- Statutory Paternity Pay
- Statutory Sick Pay
- Widowed Parent's Allowance

## section 11 financial details for the tax year 2009-10 for parents and partners

### Q4 Income from a state retirement pension

#### If you are Self Assessed

##### Online tax return

You would have been asked what your state retirement pension income amounts were as part of your self-assessment. You should refer to your saved online tax return for these income figures.

##### Paper tax return

The locations of where to find these income types on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 4.1 (non-lump sum amount only – if you completed an SA200 you would not have had a lump sum pension payment)

Full paper tax return - SA100 TR3 Box 7, SA100 TR3 Box 8

### Q5 Income from savings and investments

To make this question easier to answer, we have split it up into 4 separate parts. You may or may not have received income from every part, just tell us about the ones you did.



Only tell us about the amount of interest / income you gained from savings and investments during the 2009-10 tax year, not the actual amount of savings or invested sums you had.

#### a Income from UK banks, building societies and unit trusts

Tell us about the amount of interest / income you received from the following savings and investment income type(s):

Taxed UK interest etc. (the net amount after tax has been taken off) + untaxed UK interest (amounts that have not been taxed)

#### If you did not declare any savings and investment income to HMRC

Please refer to your bank or building society statements for these figures.

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 5.1 plus Box 5.2

Full paper tax return - SA100 TR3 Box 1 plus Box 2

## section 11 financial details for the tax year 2009-10 for parents and partners

### b Income from UK life insurance gains, securities and unit trusts

Tell us about the amount of interest / income you received from the following savings and investment income type(s):

Interest from gilt edged and other UK securities – gross amount before tax  
UK life insurance policy etc. gains on which tax was treated as paid  
UK life insurance policy etc. gains on where no tax was treated as paid  
UK life insurance policy etc. gains from voided ISA's  
Your share of taxed interest etc.  
Total untaxed savings income taxable at 20%  
Taxed income taxable at 10%  
Taxed income taxable at 20%

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from UK life insurance gains, securities and unit trusts.

Full paper tax return - SA101 Ai1 Box 3, SA101 Ai1 Box 4, SA101 Ai1 Box 6, SA101 Ai1 Box 8, SA104S Box 26, SA104F Box 33, SA104F Box 69, SA104F Box 72

### c Income from UK investments and dividends

Tell us about the amount of interest / income you received from the following savings and investment income type(s):

Dividends from UK companies  
Other dividends  
Stock Dividends  
Non-qualifying distributions and close company loans written off or released  
Share schemes – taxable amount

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 5.3

Full paper tax return - SA100 TR3 Box 3, SA100 TR3 Box 4, SA101 Ai1 Box 12, SA101 Ai1 Box 13, SA101 Ai2 Box 1

## section 11 financial details for the tax year 2009-10 for parents and partners

### d Income from foreign investment and dividends

Tell us about the amount of interest / income you received from the following savings and investment income type(s):

Foreign dividends (up to £300)  
Interest and other income from overseas savings  
Dividends from foreign companies  
Dividend income received by a person overseas

### If you are Self Assessed

#### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

#### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from foreign investment and dividends.

Full paper tax return - SA100 TR3 Box 5, SA106 F3 Box 4, SA106 F3 Box 6, SA106 F3 Box 11

## section 11 financial details for the tax year 2009-10 for parents and partners

### Q6 Income from taxable benefits in kind

#### Original P11D

The following table provides a breakdown of what we want you to include as part of your total income from 'taxable benefits in kind' during the 2009-10 tax year. Add together all the benefits in kind you received and write your total figure on the form.

Benefit in kind	Where to find amount on your P11D
Assets transferred or placed at employees disposal (cars, property, goods or other assets)	(Section A) Box 13
Payments made on behalf of employee	(Section B) Box 15 (Total sum of both boxes)
Vouchers and credit cards	(Section C) Box 12
Living accommodation	(Section D) Box 14
Mileage allowance and passenger payments	(Section E) Box 12
Total cash equivalent of all cars/vans made available	(Section F) Box 9 plus (Section G) Box 9
Total cash equivalent of fuel for all cars/vans made available	(Section F) Box 10 plus (Section G) Box 10
Cash equivalent of loans after deducting any interest paid by the borrower	(Section H) Box 15
Private medical treatment or insurance	(Section I) Box 11
Qualifying relocation expenses payments and benefits	(Section J) Box 15
Services supplied	(Section K) Box 15
Assets placed at employees disposal	(Section L) Box 13
Other items (including subscriptions and professional fees)	(Section M) Box 15 (Total sum of all boxes)
Expenses payments made to, or on behalf of, the employee	(Section N) Box 16 (Total sum of all boxes)

## section 11 financial details for the tax year 2009-10 for parents and partners

### Part C – Other income

#### Q1 Income from self-employment

To make this question easier to answer, we have split it up into 2 parts. You may or may not have received self-employment income from both parts, just tell us about the ones you did.

##### a Total taxable profit from businesses

You should include the income type below as your answer for the total amount of taxable profits you received from self-employment during the 2009-10 tax year.

Total taxable profits from this business (aggregated for multiple self employments)

#### If you are Self Assessed

##### Online tax return

You would have been asked this question as part of your assessment. You should refer to your saved online tax return for these figures.

##### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) and how to work this amount out are detailed below:

Short paper tax return - SA200 Box 3.6 plus Box 3.10

Full paper tax return - SA103F (Box 72 plus Box 74) or SA103S (Box 27 plus Box 29) or SA103L (Box 49 minus Box 50)

##### b Total taxable profit from partnerships

You should include the income type(s) below as your answer for the total profit you received from partnerships during the 2009-10 tax year.

Share of total taxed and untaxed income other than that taxable at 10% and 20%

Your share of total taxable profit from the partnerships

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) and how to work this amount out are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any self-employment income from partnerships.

Full paper tax return - SA104F (Box 14 plus Box 17 plus Box 66 plus Box 73 minus Box 74), SA104S (Box 14 plus Box 17)

## section 11 financial details for the tax year 2009-10 for parents and partners

### Q2 Minister of religion

Tell us about the amount of income you received from the following income type during the 2009-10 tax year:

Taxable income minus expenses (Ministers of religion) that are not included in your P60 or P11D

#### If you are Self Assessed

##### Online tax return

You would have been asked this question as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed SA102M tax form and how to work this amount out are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from working as a Minister of religion.

Full paper tax return - SA102M (Box 4 plus Box 8 plus Box 10 minus (Box 26 plus Box 35))

### Q3 Other income and lump sums

You should include the income type(s) below as your answer for the amount of income you received from other income and lump sums.

Add together the income types below that you received during the 2009-10 tax year and tell us your total figure on the form. You may not have received income from every income type listed just tell us about the ones you did.

Other taxable income - before expenses and tax taken off

Foreign earnings not taxable in the UK

Taxable lump sums, excluding redundancy and compensation for loss of job

Lump sums or benefits received from an Employer Financed Retirements Benefit Scheme excluding pensions

Redundancy and other lump sums and compensation payments

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 7.1

Full paper tax return - SA100 TR3 Box 16, SA101 Ai2 Box 12, SA101 Ai2 Box 3, SA101 Ai2 Box 4, SA101 Ai2 Box 5

## section 11 financial details for the tax year 2009-10 for parents and partners

### Q4 Income from property lettings

You should include the income type(s) below as your answer for the amount of income you received from property lettings.

Add together the income types below that you received during the 2009-10 tax year and tell us your total figure on the form. You may not have received income from every income type listed just tell us about the ones you did.

Income from UK property  
Income from foreign property or land

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 6.3

Full paper tax return - SA105 Box 36, SA106 Box 25

### Q5 Income from UK trusts

You should include the income type(s) below as your answer for the amount of income you received from UK trusts.

Add together the income types below that you received during the 2009-10 tax year and tell us your total figure on the form. You may not have received income from every income type listed just tell us about the ones you did.

Discretionary income payment from a UK resident trust - Net amount  
Discretionary income payment from a UK resident trust - Total payments from settlor-interested trusts  
Non-discretionary income entitlement from a trust – net amount of non-savings income  
Non-discretionary income entitlement from a trust – net amount of savings income  
Non-discretionary income entitlement from a trust – net amount of dividend income  
Income chargeable on settlors  
Income from UK estates  
Foreign estate income

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed SA107 tax form and how to work out these amounts are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from UK trusts.

Full paper tax return - SA107 Box 1, SA107 Box 2, SA107 Box 3, SA107 Box 4, SA107 Box 5  
SA107 total sum of (Boxes 7 to 14), SA107 total sum of (Boxes 16 to 21),  
SA107 Box 22

## section 11 financial details for the tax year 2009-10 for parents and partners

### Q6 Foreign income

You should include the income type(s) below as your answer for the amount of income you received from foreign income.

Add together the income types below that you received during the 2009-10 tax year and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

Total taxable amount of overseas pensions, social security benefits and royalties etc.

Total taxable amount of all other income received by a person abroad and any remitted 'ring fenced' foreign income

Gains on disposals of holdings offshore funds and discretionary income from non-resident trusts

Benefit received from an overseas trust, company or other person

Gains on foreign life policies (amount of gain)

### If you are Self Assessed

#### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

#### Paper tax return

The locations of where to find these individual figures on your completed SA106 tax form are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any foreign income.

Full paper tax return - SA106 F3 Box 9, SA106 F3 Box 13, SA106 F6 Box 41, SA106 F6 Box 42, SA106 F6 Box 43

### Q7 Income from an overseas pension

You should include the income type(s) below as your answer for the amount of income you received from an overseas pension.

Add together the income types below that you received during the 2009-10 tax year and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

Value of pension benefits in excess of your Available Lifetime Allowance, taken by you as a lump sum

Amount of unauthorised payment from a pension scheme, not subject to surcharge

Total amount of unauthorised payment from a pension scheme, subject to surcharge

Taxable short service refund of contribution (overseas pension schemes only)

Taxable lump sum death benefit payment (overseas pensions only)

### If you are Self Assessed

#### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

#### Paper tax return

The locations of where to find these individual figures on your completed SA101 tax form are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from an overseas pension.

Full paper tax return - SA101 Ai4 Box 5, SA101 Ai4 Box 10, SA101 Ai4 Box 11, SA101 Ai4 Box 13, SA101 Ai4 Box 14

## section 11 financial details for the tax year 2009-10 for parents and partners

### Q8 Other overseas income and gains

You should include the income type below as your answer for the amount of income you received from other overseas income and gains.

Add together the income types below that you received during the 2009-10 tax year and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

Amount of omissions (exemptions under transfer of foreign assets)

#### If you are Self Assessed

##### Online tax return

You would have been asked this question as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The location of where to find this figure on your completed SA106 tax form is detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from other overseas income and gains.

Full paper tax return - SA106 F6 Box 46

## section 11 financial details for the tax year 2009-10 for parents and partners

### Part D - Income deductions

#### Q3 Allowable expenses on which you claimed tax relief

The list below is a breakdown of what we want you to include in your answer for the amount of allowable expenses you had on which you claimed tax relief.

Add together all allowable expenses below which you had during the 2009-10 tax year and tell us your total figure on the form. You may not have had all the allowable expenses listed, just tell us about the ones you did.

Total amount of allowable expenses  
Seafarers' Earnings Deduction  
Foreign tax for which tax credit relief not claimed  
Business travel and subsistence expenses  
Fixed deductions for expenses  
Professional fees and subscriptions  
Other expenses and capital allowances

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 2.5

Full paper tax return - SA100 TR3 Box 17, SA101 Ai2 Box 11, SA101 Ai2 Box 13, SA102 E1 Box 17, SA102 E1 Box 18, SA102 E1 Box 19, SA102 E1 Box 20

### Part E - Your dependants

#### Academic year

You should provide the child dependants' income for the academic year. The academic year is determined by when the student begins their study.

##### Student's study begins between:

1 August 2011 and 31 December 2011 inclusive

1 January 2012 and 31 March 2012 inclusive

1 April 2012 and 30 June 2012 inclusive

1 July 2012 and 31 July 2012 inclusive

##### Academic year

1 September 2011 to 31 August 2012

1 January 2012 to 31 December 2012

1 April 2012 to 31 March 2013

1 July 2012 to 30 June 2013

**Q1** The child dependant's income is required to assess eligibility for deductions in the calculation of household income for each child that is wholly or mainly financially dependent on the student, the student's husband, wife or partner or the student's parents or step parents. You can find out more information about how household information is calculated in the booklet 'Higher education student finance – How you are assessed and paid' which you can download from [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk).

Please do not include income from sources such as the Government Child Trust, State Child Benefit or minimal sums of money from other sources when entering a child dependant's income.

## Declaration for parents and partners

If any person(s) named in section 11 cannot sign the form it must be signed on their behalf by their Power of Attorney. The Power of Attorney letter must be sent with the application before a signature from that Power of Attorney will be accepted.

### Changes of circumstance

You must notify your ELB about any change in your circumstances which may affect your entitlement to financial support.

The most common change of circumstance would be if:

- your household income changes; or
- your marital status changes.

### Information about data sharing for bursary and scholarship purposes

Universities and colleges will be offering financial awards such as bursaries or scholarships to their students. To help them administer these awards (i.e. to determine eligibility and entitlement to, and if relevant pay, a bursary or scholarship - 'bursary administration purposes') they will ask the Department for Employment and Learning, your Education and Library Board or Student Loans Company for access to information you provide in connection with any application for student finance for academic year 2011/12 (whether on this form or at a later date).

We will share the relevant information with them, unless you indicate that you do not wish us to do so by ticking the box on the declaration. If you **do not** give consent for us to share this information, the payment of any bursary or scholarship to which the student(s) you are supporting may be entitled will be delayed.

## Data Protection Act 1998

The Student Loans Company (SLC) is a Data Controller under the Data Protection Act 1998. We hold information for the purposes specified in our notification to the Information Commissioner including determining eligibility for student finance, assessing the maximum amount of financial support available, payment of student finance and the detection and prevention of fraud, and may use this information for any of these. The Department for Employment and Learning is a joint Data Controller for your information. If false or inaccurate information is provided and fraud is identified, details may be passed to fraud prevention agencies to prevent fraud and money laundering. We may share the information you have given us with other organisations including the Department for Employment and Learning, other Government bodies and with the university or college for these purposes. We may also get information about you from other organisations. If so, it will only be for the purposes described and as the law permits us to do. For more detailed information about with whom we share your information and for what purpose, go to [www.studentfinancenl.co.uk/dataprotection](http://www.studentfinancenl.co.uk/dataprotection).