

Notes to help you  
complete your  
Application for Student  
Finance **2010/11**


**PR1** notes  
Continuing Students


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

**StudentFinance ni is a partnership between the Education and Library Boards (ELBs) and the 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 form PR1 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:
  - Student Finance England (SFE)
  - Your Local Authority (LA) in Wales
  - The Student Awards Agency for Scotland (SAAS)
  - 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 2010.
- 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. 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 will be receiving a bursary from the National Health Service (NHS) or the Department of Health, Social Services and Public Safety (DHSS&PS) which is not assessed on your household income, excluding the social work bursary.
- You are or will be in receipt of funding to participate in the Business Education Initiative Scheme.

You must use these notes whenever you see this icon within the main PR1 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 form PR1 you should check these notes for information on the evidence required.

## section 1 finance available

### Maintenance Loan **REPAYABLE**

You may not be eligible for a Maintenance Loan if you already hold a UK 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 to you may be reduced.

### Tuition Fee Loan **REPAYABLE**

You may not be eligible for a Tuition Fee Loan if you already hold a UK 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 £3,290, 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, the tuition fee chargeable could be any amount up to a maximum of £1,310. 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 £3,290.

If you started your course before academic year 2006/07 or you were a gap year student who started your course in academic year 2006/07, your university or college can charge tuition fees up to a maximum of £1,310. You can apply for a Tuition Fee Loan to cover this cost. However, if you receive a Grant for Tuition Fees then the amount of Tuition Fee Loan you can apply for will be dependant on how much Grant for Tuition Fees you are entitled to.

If you are undertaking a course at a private university or college then you may be charged more than £3,290 for tuition fees. You can still apply for a Tuition Fee Loan up to the maximum of £3,290 if your course is one that qualifies for tuition fee support.

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

### 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.

### 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.

## 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 costs of travel. You may also be able to get help to cover the cost of 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.

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

These can help pay for the 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.

If you want to apply for DSAs only, you should complete sections 2-3 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).

**e** If you provide evidence of your disability such as a letter from your doctor, or if you have a specific learning difficulty, 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. For further information please refer to 'Bridging the Gap: a guide to the Disabled Students' Allowances (DSAs) in higher education 2010/11'.

### 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. For further information please refer to our guide 'Childcare Grant and other support for full-time student parents in higher education 2010/11'.

## section 1 finance available

**Students who started their course in academic year 2006/07 or after (excluding gap year students who started in 2006/07) may be eligible for the following:**

### 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 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 a young person aged under 20 who is in full-time non-advanced education).
- 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.
- 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.
- 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, with supporting evidence, with this 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. Entitlement is calculated in the same way as the Maintenance Grant but will 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.

If you are unsure about your eligibility for a Special Support Grant, call our Customer Support Office for help.

### 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

Students who started their course in academic year 2005/06 or before (including gap year students who started in 2006/07) may be eligible for the following:

### Grant for Tuition Fees NOT REPAYABLE

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

If you are assessed as having to pay a contribution towards your tuition fees then you can apply for a Tuition Fee Loan to cover this assessed contribution, up to a maximum of £1,310.

If you are studying on a full-time Initial Teacher Training (ITT) course this grant may be non-income assessed and will be used to help with the amount of tuition fees charged by your university or college, up to a maximum of £1,310.

If you are studying at a private university or college, you are NOT eligible for a Grant for Tuition Fees, unless you are continuing your studies which started before September 2006, in which case you may be eligible for a Grant for Fees which is non-income assessed.

If you are entitled to any of this grant it will be paid directly to your university or college.

### Higher Education (HE) Bursary NOT REPAYABLE

There is up to £2,000 available, depending on your household income, to meet your living costs. It is counted by the Social Security Agency when calculating your other benefits.

If you are still having difficulty choosing which types of financial support you wish to apply for, please refer to the following sources for further information:

- **A guide to financial support for higher education students in 2010/11**
- **Student Loans: A guide to terms and conditions**
- **Bridging the Gap: a guide to the Disabled Students' Allowances (DSAs) in higher education 2010/11**
- **Childcare Grant and other support for full-time student parents in higher education 2010/11**

All of these booklets, as well as all of the application forms, are available at [www.studentfinanceneni.co.uk](http://www.studentfinanceneni.co.uk).

All forms and booklets are also available in Braille, large print or audio. If you require copies of any forms or booklets in one of these alternative formats, please contact our Customer Support Office on **0845 600 0662**.

## Section 2 personal details

### Contact details

- b** 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

- c** 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 your application. Your document will be returned to you.
- e** If you are separated, divorced or 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 about your course and your university or college

### e Course type

#### Part-time ITT (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.

#### Full-time distance learning

**e** 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.

**f** 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**

**g** If you have applied, or will be applying, for a social work bursary from the Social Services Inspectorate (SSI) 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 their fifth year of study on a medical or dental course will have their DHSS&PS bursary entitlement assessed by their ELB using the information provided on the PR1 form.

If you are receiving or are likely to receive 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 receiving or are likely to receive a **non-income assessed** bursary then you are NOT eligible for any other student finance unless 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.

If you are unsure about your eligibility for a bursary, contact your ELB.

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

## section 4 your UK bank or building society account details

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:

- 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 personal 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.

To apply for a Maintenance Loan or a Tuition Fee Loan, or to change the amount you originally requested, you can download a Maintenance Loan or Tuition Fee Loan Request form 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 5 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 certificate(s) 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.

## section 6 student financial questions

### a Unearned income

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 holiday 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 6d;
- Teacher Training Bursaries;
- Care Leavers' Bursary;
- bounties paid by the armed services to reservists or disablement or invalidity pensions; or
- ISAs.

### b Payments from an employer

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 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.

### d Dependent children

You must include any income the child receives from working, from interest earned on savings, from investments and 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) to confirm their date(s) of birth before they can be taken into account when assessing your entitlement. If you have provided these with a previous application for financial support then you do not need to provide them again.

## Section 7 Parents' Learning Allowance, Adult Dependants' Grant and Childcare Grant

- 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 will have to provide documentary evidence of any obligations you declare.
- 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 HM Revenue & Customs (HMRC) helpline on 0845 603 2000.

## section 8 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.

 **c** If your parents are divorced, 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 this application before a signature from that Power of Attorney will be accepted.

### Data Protection

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.

### 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 9 financial details for the tax year 2008-09 for parents and partners

### Part B - Your financial information

**Q1b** If you have already provided information about your income for the tax year 2007-08, and your income was £15,000 or less in that year and also in the tax year 2008-09, you only need to answer this question in Part B. You do not need to answer any of the other questions in this section or provide evidence of your income. However, you should keep all information about your income and supporting evidence (such as P60s) for the tax year 2008-09, as you may be asked to provide these at a later date.

#### Tax Year

Please give information for the tax year 2008-09. Normally, this is the year ending 5 April 2009, but may differ if your employer or business has a tax year which does not end in April.

If you are paid in a foreign currency, please state the equivalent in pounds sterling.

#### What if my income is less in tax year 2010-11 than it was in tax year 2008-09?

If you think the total income for your household (before tax) for the tax year 2010-11 will be at least 5% less than it was in tax year 2008-09, still complete this section.

From April 2010, it may be possible for the tax assessment to be calculated using the expected total income for your household in the tax year 2010-11 - a 'current year income assessment'.

- If you are completing this form before April 2010, please give brief details of the expected reduction in income on a separate piece of paper and enclose it with this application. We will then contact you for further information when we can fully assess your household's financial circumstances.
- If you are completing this form after April 2010, you can download a 'Current Year Income Assessment' form from [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk) and return it with this application or contact our Customer Support Office on 0845 600 0662 to have one sent to you.
- All family members who count for the purposes of income assessment will need to complete a 'Current Year Income Assessment' form so we can fully assess your household's financial circumstances.



Please note that a 'current year income assessment' cannot be carried out unless you also provide your financial details for the 2008-09 tax year.

## section 9 financial details for the tax year 2008-09 for parents and partners

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

#### 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

Income Type	Amount (£)	Where to find amount
Total salary or wages for the year:	£ <input type="text"/>	P60 - Pay and income details box
Income from taxable state benefits:	£ <input type="text"/>	P60 - Pay and income details box
Occupational Pension:	£ <input type="text"/>	P60 - Pay and income details box
Tips and other payments not on P60:	£ <input type="text"/>	SA102 E1 Box 3
Directors salary or wages:	£ <input type="text"/>	P60 - Pay and income details box
Total income received:	£ <input type="text"/>	Write this total figure on the application form.

## section 9 financial details for the tax year 2008-09 for parents and partners

### Q4. Income from Self-employment

Income showing on your SA103 and/or SA200 documents

Income Type	Amount (£)	Where to find amount
Total taxable profits from this business (aggregated for multiple Self-employments):	£ <input type="text"/>	SA103F Box 72 + Box 74 SA103L Box 51 minus Box 52 SA103S Box 27 + Box 29
Profit (Self-employment):	£ <input type="text"/>	SA200 Box 3.10
Business start up allowance:	£ <input type="text"/>	SA200 Box 3.6
Total Self-employment income showing on your SA103 and SA200 documents:	£ <input type="text"/>	Write this total figure on the application form.

Income stated on SA104 document

Income Type	Amount (£)	Where to find amount
Share of total taxed and untaxed income other than that taxable at 10% and 20%:	£ <input type="text"/>	SA104F Box 14 + Box 17 + Box 66 + Box 73 minus box 74
Your share of total taxable profit:	£ <input type="text"/>	SA104S Box 14 + 17
Total Self-employment income showing on your SA104 document:	£ <input type="text"/>	Write this total figure on the application form.

### Q5. Income from a State Retirement Pension

Non-Lump Sum

Income Type	Amount (£)	Where to find amount
Total State Retirement Pension (non-lump sum):	£ <input type="text"/> Write this total figure on the application form.	SA100 TR3 Box 7 or SA200 Box 4.1

Lump Sum

Income Type	Amount (£)	Where to find amount
Total State Retirement Pension (lump sum):	£ <input type="text"/> Write this total figure on the application form.	SA100 Box 8

## section 9 financial details for the tax year 2008-09 for parents and partners

### Q6. Minister of religion

Income Type	Amount (£)	Where to find amount
Total taxable income minus expenses not included in your P60 or P11D:	<p>£ <input type="text"/></p> <p>Write this total figure on the application form.</p>	SA102M Box 4 + Box 8 + Box 10 minus (Box 26 + Box 35)

### Q7. Income from savings and investments

Total income showing on your SA100 and SA200 documents or on your bank statements/letters if you were not Self Assessed (SA).

Income Type	Amount (£)	Where to find amount
Dividends from UK companies:	£ <input type="text"/>	SA100 TR3 Box 3 (grossed Up)
Dividends from unit trusts and open ended investment companies:	£ <input type="text"/>	SA100 TR3 Box 4 (grossed Up)
Foreign dividends (up to £300):	£ <input type="text"/>	SA100 TR3 Box 5
UK bank, building society, unit trust etc. interest/amount which has been taxed already (grossed up) plus untaxed UK interest (amounts that have not been taxed at all):	£ <input type="text"/>	SA100 TR3 Box 1 (grossed up) + SA100 TR3 Box 2 or SA200 Box 5.1 (grossed) + SA200 box 5.2
UK interest, dividends and other investment income – company dividends (excluding tax credit):	£ <input type="text"/>	SA200 Box 5.3
Total savings and investment income showing on your SA103 and SA200 documents:	£ <input type="text"/>	Write this total figure on the application form.

## section 9 financial details for the tax year 2008-09 for parents and partners

### Income from savings and investments

Total income showing on your SA101 document

Income Type	Amount (£)	Where to find amount
Stock dividends:	£ <input type="text"/>	SA101 Ai1 Box 12 (grossed up)
Non-qualifying distributions and close company loans written off or released:	£ <input type="text"/>	SA101 Ai1 Box 13
Interest from gilt edged and other UK securities – gross amount before tax:	£ <input type="text"/>	SA101 Ai1 Box 3
UK life insurance policy etc. gains on where no tax was treated as paid:	£ <input type="text"/>	SA101 Ai1 Box 6
UK life insurance policy etc. gains from voided ISA's:	£ <input type="text"/>	SA101 Ai1 Box 8
Life insurance gains – UK life insurance policy etc.gains on which tax was treated as paid:	£ <input type="text"/>	SA101 Ai1 Box 4
Share schemes – taxable amount:	£ <input type="text"/>	SA101 Ai2 Box 1
Total savings and investment income showing on your SA101 document:	£ <input type="text"/>	Write this total figure on the application form.

## section 9 financial details for the tax year 2008-09 for parents and partners

### Income from savings and investments

Total income showing on your SA104 document

Income Type	Amount (£)	Where to find amount
Total untaxed savings income taxable at 20%:	£ <input type="text"/>	SA104F Box 33
Taxed income taxable at 10%:	£ <input type="text"/>	SA104F Box 69
Taxed income taxable at 20%:	£ <input type="text"/>	SA104F Box 72
Taxed interest:	£ <input type="text"/>	SA104S Box 26
Total savings and investment income showing on your SA104 document:	£ <input type="text"/>	Write this total figure on the application form.

### Income from savings and investments

Total income showing on your SA106 document

Income Type	Amount (£)	Where to find amount
Foreign investment income:	£ <input type="text"/>	SA106 F3 Box 4
Dividend income (foreign) other:	£ <input type="text"/>	SA106 F3 Box 11
Dividends from foreign companies:	£ <input type="text"/>	SA106 F3 Box 6 (grossed up)
Total savings and investment income showing on your SA106 document:	£ <input type="text"/>	Write this total figure on the application form.

## section 9 financial details for the tax year 2008-09 for parents and partners

### Q8. Income from taxable benefits in kind

Income Type	Amount (£)	Where to find amount
Total cash equivalent of fuel for all cars/ vans made available:	<input type="text"/>	P11D Box 10 (Section F & G)
Private medical treatment or insurance:	<input type="text"/>	P11D Box 11
Vouchers and credit cards:	<input type="text"/>	P11D Box 12 (Section C)
Mileage allowance and passenger payments:	<input type="text"/>	P11D Box 12 (Section E)
Assets transferred or placed at employees disposal (cars, property, goods or other assets):	<input type="text"/>	P11D Box 13 (Section A)
Assets placed at employees disposal:	<input type="text"/>	P11D Box 13 (Section L)
Living accommodation:	<input type="text"/>	P11D Box 14 (Section D)
Payments made on behalf of employee:	<input type="text"/>	P11D Box 15 (Section B)
Cash equivalent of loans after deducting any interest paid by the borrower:	<input type="text"/>	P11D Box 15 (Section H)
Qualifying relocation expenses payments and benefits:	<input type="text"/>	P11D Box 15 (Section J)
Services supplied:	<input type="text"/>	P11D Box 15 (Section K)
Other items (including subscriptions and professional fees):	<input type="text"/>	P11D Box 15 (Section M)
Expenses payments made to, or on behalf of, the employee:	<input type="text"/>	P11D Box 16 (Section N)
Total cash equivalent of all cars/vans made available:	<input type="text"/>	P11D Box 9 (Section F & G)
Total income from taxable benefits in kind:	<input type="text"/>	Write this total figure on the application form.

## section 9 financial details for the tax year 2008-09 for parents and partners

### Q9. Income from other taxable income and lump sums

Income Type	Amount (£)	Where to find amount
Other taxable income before expenses and tax taken off (casual earnings, freelance income, business receipts where your business has ceased):	£ <input type="text"/>	SA100 TR3 Box 15
Foreign earnings not taxable in the UK:	£ <input type="text"/>	SA101 Ai2 Box 12
Taxable lump sums, excluding redundancy and compensation for loss of job:	£ <input type="text"/>	SA101 Ai2 Box 3
Lump sums or benefits received from an employer financed retirements benefit scheme:	£ <input type="text"/>	SA101 Ai2 Box 4
Redundancy and other lump sums and compensation payments:	£ <input type="text"/>	SA101 Ai2 Box 5
Other income (short return):	£ <input type="text"/>	SA200 Box 7.1
Total income from other taxable income and lump sums:	£ <input type="text"/>	Write this total figure on the application form.

### Q10. Income from property lettings

Income Type Name	Amount (£)	Where to find amount
Income from foreign property or land:	£ <input type="text"/>	SA106 Box 25
Income from UK property:	£ <input type="text"/>	SA200 Box 6.3 or SA105 Box 36
Total income from property lettings:	£ <input type="text"/>	Write this total figure on the application form.

## section 9 financial details for the tax year 2008-09 for parents and partners

### Q11. Income from UK trusts

Income Type	Amount (£)	Where to find amount
Discretionary income payment from a trust (grossed up):	<input type="text" value="£"/>	SA107 Box 1 (grossed up)
Total payments from settlor-interested trusts:	<input type="text" value="£"/>	SA107 Box 2
Foreign estate income:	<input type="text" value="£"/>	SA107 Box 22
Non-discretionary income entitlement from a trust - net amount taxed at basic rate (grossed up):	<input type="text" value="£"/>	SA107 Box 3 (grossed up)
Non-discretionary income entitlement from a trust - net amount taxed at savings rate (grossed up):	<input type="text" value="£"/>	SA107 Box 4 (grossed up)
Non-discretionary income entitlement from a trust - net amount taxed at dividend rate (grossed up):	<input type="text" value="£"/>	SA107 Box 5 (grossed up)
Income chargeable on settlors:	<input type="text" value="£"/>	SA107 Boxes 13 -14
Income from UK estates grossed up:	<input type="text" value="£"/>	SA107 Boxes 16 - 21 (grossed up)
Income chargeable on settlors:	<input type="text" value="£"/>	SA107 Boxes 7 - 12 (grossed up)
<b>Total income from UK trusts:</b>	<input type="text" value="£"/>	Write this total figure on the application form.

## section 9 financial details for the tax year 2008-09 for parents and partners

### Q12. Income from foreign income

Income Type	Amount (£)	Where to find amount
All other overseas income received by an overseas trust, company or other person abroad:	£ <input type="text"/>	SA106 F3 Box 13
Overseas Pensions etc:	£ <input type="text"/>	SA106 F3 Box 9
Gains on disposals of holdings offshore funds and discretionary income from non resident trusts:	£ <input type="text"/>	SA106 F6 Box 41
Benefit received from an overseas trust, company or other person:	£ <input type="text"/>	SA106 F6 Box 42
Gains on foreign life policies (amount of gain):	£ <input type="text"/>	SA106 F6 Box 43
Total income from foreign income:	£ <input type="text"/>	Write this total figure on the application form.

### Q13. Income from an Overseas Pension

Income Type	Amount (£)	Where to find amount
Total amount of unauthorised payment from a scheme, subject to surcharge:	£ <input type="text"/>	SA101 Ai4 Box 10
Taxable short service refund of contribution (Overseas Pension schemes only):	£ <input type="text"/>	SA101 Ai4 Box 12
Taxable lump sum death benefit payment (Overseas Pensions only):	£ <input type="text"/>	SA101 Ai4 Box 13
Value of pension benefits in excess of your available lifetime allowance, taken by you as a lump sum:	£ <input type="text"/>	SA101 Ai4 Box 5
Amount of unauthorised payment from a pension scheme, not subject to surcharge:	£ <input type="text"/>	SA101 Ai4 Box 9
Total income from an Overseas Pensions:	£ <input type="text"/>	Write this total figure on the application form.

## section 9 financial details for the tax year 2008-09 for parents and partners

### Q14. Income from other overseas income and gains

Income Type	Amount (£)	Where to find amount
Amount of omissions (exemptions under transfer of foreign assets):	<input type="text"/> <p>Write this total figure on the application form.</p>	SA106 F6 Box 46

### Obligations

#### Q15. Private pension contributions

Do not include any regular payments you are making towards a retirement pension provided by your employer.

Obligation Type	Amount (£)	
Private pension contributions:	<input type="text"/>	Write this total figure on the application form.

#### Q16. Additional Voluntary Contributions (AVCs)

Obligation Type	Amount (£)	
Additional Voluntary Contributions (AVCs):	<input type="text"/>	Write this total figure on the application form.

## section 9 financial details for the tax year 2008-09 for parents and partners

### Q17. Allowable expenses on which you claimed tax relief

Obligation Type	Amount (£)	Where to find amount
Total amount of allowable expenses:	£ <input type="text"/>	SA100 TR3 Box 16
Seafarers earnings deduction:	£ <input type="text"/>	SA101 Ai2 Box 11 (Deductions)
Foreign tax for which tax credit relief not claimed:	£ <input type="text"/>	SA101 Ai2 Box 13 (Deductions)
Business travel and subsistence expenses:	£ <input type="text"/>	SA102 E1 Box 17
Fixed deductions for expenses:	£ <input type="text"/>	SA102 E1 Box 18
Professional fee's and subscriptions:	£ <input type="text"/>	SA102 E1 Box 19
Other expenses and capital allowances:	£ <input type="text"/>	SA102 E1 Box 20
Allowable expenses:	£ <input type="text"/>	SA200 Box 2.5
Total amount of allowable expenses:	£ <input type="text"/>	Write this total figure on the application form.

### Part C - 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:	Academic Year
1 August 2010 and 31 December 2010 inclusive	1 September 2010 to 31 August 2011
1 January 2011 and 31 March 2011 inclusive	1 January 2011 to 31 December 2011
1 April 2011 and 30 June 2011 inclusive	1 April 2011 to 31 March 2012
1 July 2011 and 31 July 2011 inclusive	1 July 2011 to 30 June 2012

**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'.

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 named in section 9 is unable to sign the form, for whatever reason, someone who holds a valid Power of Attorney for that person may sign on their behalf. The Power of Attorney letter must be sent with this 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 the ELB about any change in your circumstances, which may affect the student's 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 Secretary of State or Student Loans Company for access to information you provide in connection with any application for student finance for academic year 10/11 (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.