



# PTG1 notes

Notes to help you complete your form PTG1 2011/12

## General information

### A guide to completing your application for grants for part-time study

If you require further information you should:

- refer to the booklet 'A guide to financial support for part-time students in higher education 2011/12' available from [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)
- visit [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)
- contact our Customer Support Office on 0845 600 0662

### You should not complete this form if any of the following apply to you:

- You normally live in England, Wales, Scotland, the Channel Islands or the Isle of Man, even if you have moved, or are moving to Northern Ireland to undertake your course. If this is the case you should contact whichever of the following organisations is relevant:

#### Where you live

England  
 Wales  
 Scotland  
 Channel Islands  
 Isle of Man

#### Relevant organisation

Student Finance England  
 Your Local Authority (LA)  
 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 at the Open University. Contact the Open University on 028 9024 5025 to obtain copies of its application forms for financial support.
- You are a national of a European Union Member State and you have moved or are moving to Northern Ireland to attend a course of higher education. You should contact the EU Customer Services Team on 0141 243 3570.
- You are a prisoner serving a custodial sentence. If this is the case, you will **not** be eligible for grants or Disabled Students' Allowances (DSAs) for a part-time course. If you go to prison or are released from prison during the academic year, you may be able to receive grants and DSAs for a part-time **undergraduate** course.
- You will get a bursary from the Department of Health, Social Services and Public Safety (DHSS&PS) or the National Health Service (NHS) which is not assessed on income. This normally applies to nursing and midwifery diploma courses.
- You will be attending a flexible postgraduate ITT course that lasts less than one year. If your course normally lasts for at least one year, but you do not attend for a full year or more because you were awarded Qualified Teacher Status (QTS) before then, you may be eligible for some support. Please contact your university or college for more information.

## Disabled Students' Allowances (DSAs)

If applying for DSAs you need to complete a Disabled Students' Allowances application form (DSA1). This is available from [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk), or by calling us on 0845 600 0662 to have one sent to you. If you are a postgraduate student or distance learning student applying for DSAs you should **not** complete this PTG1 form as you are not eligible for part-time grants.

If you have already completed the DSA1 form relating to part-time study you will **not** have to complete the following sections of the PTG1 form:

- section 2, questions f and g
- any of section 3

## Studying in other parts of the UK

Eligible part-time students who are living in Northern Ireland but choose to study in Wales, Scotland or England will still receive financial support in the form of a fee grant and a course grant. The financial support available will be equal to that which these other administrations would provide to their own students studying in their home region. However, it will not be more than the maximum statutory fee grant offered to students living in Northern Ireland who choose to study in Northern Ireland.

## Part-time distance learning students

If you are a part-time student undertaking a course by distance learning you are eligible for finance from the administration you live in and not the administration you will be studying in.

For example, if you are undertaking a distance learning course from your home in Northern Ireland but your course is provided by a university or college in Scotland, Wales or England, and you are eligible for student finance, your financial support will be provided by the Northern Ireland administration.

Place of Study	Term 'administration'
Northern Ireland	Department for Employment and Learning
Wales	Welsh Ministers
England	Secretary of State for Business, Innovation and Skills
Scotland	Student Awards Agency for Scotland

## section 1 personal details

**a** Your Customer Reference Number is your personal reference number and should be 11 digits long. You will have one of these if you have previously had a student loan or any other student finance from the Student Loans Company (SLC) or your Education and Library Board (ELB). You may also have one if you have given financial information for another student's application. If you do not have one or do not know what your Customer Reference Number is please leave this blank.

**e** If you are a returning student and have previously sent the following evidence you do **not** have to send it again. If not please send an original:

- adoption certificate;
- passport;
- birth certificate; or
- United Kingdom (UK) birth certificate issued by a British Consulate abroad.

If you send your original birth certificate or adoption certificate you must also send a completed Birth/Adoption Certificate form, this contains two separate declarations.

- 1 Declaration of Identity signed by yourself.
- 2 Identity Confirmation completed and signed by a person of good standing (for example, teacher, solicitor, civil servant or police officer) who has known you for at least two years.

This form is available from [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk) or by calling our Customer Support Office.

**Your original documents will be sent back to you as soon as possible.**

Replacement birth certificates can be obtained from the Registers Office in the sub district where your birth was registered or from the following depending on where you were born:

Born	Contact point
Northern Ireland	General Register Office 028 9025 2000
England/Wales	Certificate Services Section, General Register Office 0845 603 7788
Scotland	General Register Office for Scotland 0131 314 4411

### Name change


If your name has changed from your birth certificate or passport please supply supporting evidence confirming the change, also provide a note on a separate piece of paper of any other previous names you have had.

**b** Definition of partner depends on when you entered higher education.


If you entered higher education between 1 September 2000 – 31 August 2005	If you entered higher education on or after 1 September 2005
<ul style="list-style-type: none"> <li>• your husband/wife;</li> <li>• your civil partner; or</li> <li>• your opposite sex partner if you are 25 or over and you live together as though you were married.</li> </ul>	<ul style="list-style-type: none"> <li>• your husband/wife;</li> <li>• your civil partner;</li> <li>• your opposite sex partner if you live with your partner as though you were married; or</li> <li>• your same sex partner if you live with your partner as though you were in a civil partnership.</li> </ul>

## section 1 personal details

**If you will be under 25 at the start of your course and you are married or in a civil partnership you need to send supporting evidence, for example:**

-  • original marriage certificate; or
- civil partnership documents.

**If you are divorced or separated, or if you have been in a civil partnership which has been dissolved, you need to send evidence, for example:**

-  • decree absolute;
- dissolution order; or
- letter from your solicitor confirming your status.

**If you are a widow or a surviving civil partner, you need to send evidence, for example:**

-  • original death certificate

If you have entered into an overseas civil partnership or an equivalent legal relationship with a same-sex partner, we will contact you to let you know whether this will be recognised for student finance purposes.

- c** If you provide a term-time address all correspondence we issue will be sent to that address from the date you move there. You can update your term-time address or your home address at any time by contacting our Customer Support Office.

## section 2 previous loans or financial support

- a** On page 16 - Additional notes please provide information of any other assistance you are receiving to help you undertake your course, for example, day release arrangements, help with travel and other course costs, or help with childcare.
- c** If you already hold a first degree from a UK institution, or an ROI institution for which you were funded under the Northern Ireland Student Support Regulations, you will **not** be eligible for any part-time grants. However you should answer 'No' to this question if:
  - you previously started a course which led to a first degree (for example, BA, BSc or BEd) but didn't finish it;
  - you hold a qualification that is not a first degree (for example, HND, HNC or Dip HE); or
  - the qualification was gained from outside the UK (which includes the Isle of Man and the Channel Islands).
- d1** This includes any undergraduate or postgraduate course you have attended whether it was in the UK or overseas. Examples of Higher Education courses you should tell us about include:
  - UK courses such as DipHE, HND 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.)
- d2** Please provide the name of the institution where you studied, the name of the course and the qualification gained.

## section 2 previous loans or financial support

- f** You will not normally be able to get any grants until you are up to date with your repayments on any previous loans you have had from SLC. Please call SLC on 0845 073 8891 for advice.
- g** You will not normally be able to get any grants until you have signed all of the relevant documents. Please call SLC on 0845 026 2019 for advice.

## section 3 residence

- 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 or a letter or other document. If you have provided your UK passport or Birth Certificate as part of section 1, you do not need to send any further evidence of your UK nationality.
- 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).
- a4** If you are an EEA or Swiss national who is currently employed in the UK, you will need to provide evidence such as:
- a P60; or
  - a letter from your employer.

If you are an EEA or Swiss national who is currently working in the UK as a self-employed person you will need to provide evidence such as:

- audited accounts;
- tax returns; or
- details of income.

If you are going to continue working whilst you are studying you will need to provide:

- a letter from your employer confirming this;
- audited accounts;
- tax returns; or
- details of income if you are self-employed.

If you are an EEA or Swiss national who is currently looking for work in the UK, you will need to show evidence of this, as well as your previous employment or work as a self-employed person in the UK such as:

- a P45;
- a P60;
- a letter from your employer;
- audited accounts;
- tax returns; or
- details of income if you were self-employed.

## section 3 residence

If you are an EEA or Swiss national who previously worked in the UK, you will need to provide evidence such as:

- a P45;
- a P60; or
- a letter from your previous employer.

**In all cases you will need to provide evidence of your EEA or Swiss nationality such as a passport or national identity card.**

If it is your relative who is working, has worked or is looking for work in the UK they will need to provide the relevant evidence rather than you. If your child or son or daughter-in-law 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:

- e**
- 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).

**a6** If you or your:

- e**
- 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. You should send these documents, not photocopies, with your application form. You should also provide evidence to confirm your relationship to the person who has been granted refugee status.

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).

## section 3 residence

**a7** If you or your:

- e** • 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 him or her) a letter and an immigration status document confirming this. Where applicable this letter should also tell you (or him or her) when the leave to enter or remain status is due to expire. You should send this letter, not a photocopy, with your application form. You should also provide evidence to confirm your relationship to the person who has been granted leave to enter or remain.

If you (or your husband, wife, civil partner, parents or a step-parent) have been granted '**indefinite leave to remain**', you should mark the expiry date box as N/A (not applicable).

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.

### **b2** Residence history

The academic year will start depending on the date your course begins and will fall within one of the following timescales:

<b>Date study begins between</b>	<b>Date academic year begins</b>
1 August – 31 December inclusive	1 September
1 January – 31 March inclusive	1 January
1 April – 30 June inclusive	1 April
1 July – 31 July inclusive	1 July

## section 4 about your course

- c** Only designated courses are eligible for support. Your university or college will be able to tell you whether your course is a designated course.
- g** Please give this answer in whole years. You should work this out assuming that you will study continuously, even if you have different plans. Your university or college will be able to tell you how long, in total, your course will take to complete. You must be planning to complete your course in no more than twice the time it would take you to finish it on a full-time basis. If you are studying at a faster rate than this, you may be able to receive more Tuition Fee Grant, subject to your financial circumstances. See the booklet, 'A guide to financial support for part-time students in higher education 2011/12' for information on fee grant rates applicable depending on your study rate.
- i** **Do not** complete this form if you are studying full-time and are attending your university or college regularly instead of studying by distance learning. You should complete this form if you are studying by distance learning including a full-time distance learning course. **Do not** complete this form if you are studying a full-time distance learning course because you have a disability that prevents you from attending; contact our Customer Support Office on 0845 600 0662 for advice. If you are not sure, your university or college will tell you whether your course is designated as distance learning or not.

## section 5 your UK bank or building society account details

Please check the following before completing your bank or building society details:

- the account is held in your name
- your account accepts BACS payments (Bankers Automated Clearing System)
- it is a UK bank or building society
- if giving details of a building society you may need to provide a roll number (check with your building society regarding this).

## section 6 your university or college

Intensity of study is calculated each year by considering how long it will take you to complete your course. Students should therefore make sure their university or college is in agreement with them about their intended intensity of study.

## section 8 financial details

- a** If you are not married or in a civil partnership, but are living with a partner we will take your partner's income into account if you have a partner as defined in section 1, question b1 of these notes.

If you or your husband, wife, civil partner or partner are receiving any one of the benefits listed, you must provide evidence to show who is receiving the benefit. **You do not need to provide any other financial details.** You can either send the original document you received from the agency or authority telling you about the benefit, or you can send a completed 'Confirmation of benefits' (CB1) form with your application.

**e**

You can download a copy of form CB1 from [www.studentfinanceni.co.uk](http://www.studentfinanceni.co.uk) or contact our Customer Support Office to have one sent to you.

### **b Income**

Please give details of income in the **tax year ending 5 April 2011**. This means income from all sources before any personal relief, payments under covenant or deductions are made, and from abroad, which is not covered by UK tax.

You **do not** have to declare any income from:

- Working Tax Credit;
- Child Tax Credit; or
- Maintenance payments (either received or paid out).

If your husband, wife, civil partner or partner wishes to provide income information separately they can obtain a copy of the PTG1 form from our website [www.studentfinanceni.co.uk](http://www.studentfinanceni.co.uk) or they can contact our Customer Support Office.

- b1** Your gross income means income before deductions from:

- salary/wages;
- overtime;
- bonuses; and/or
- commission.

We require these figures for **tax year 2010-11**, normally this will be the year ending 5 April 2011, but this may differ if your employer or business has a tax year which does not end in April, or you start your course in July.

Please include income you received from abroad in 2010-11 such as from employment overseas, and any other income you get from abroad which is not covered by UK tax as well as any of the benefits asked for.

Do not include any of the following;

- any personal relief;
- payments under covenant; or
- non-taxable income.

- e** Evidence of your earnings can be in the form of:

- P60 for 2010-11;
- Payslips for month 12 or week 53 showing 'Total paid to date' for earnings in the period 6 April 2010 to 5 April 2011;
- A completed 'Confirmation of Income Form for Part-time Students 2011/12' (PTCI2) form;
- A letter from your employer confirming your earnings; or
- Written details of all benefits in kind you receive.

You can download a copy of the form PTCI2 at [www.studentfinanceni.co.uk](http://www.studentfinanceni.co.uk) or call our Customer Support Office.

## section 8 financial details

**b2** You should give the details shown on your self-assessment form for your trading year which ends during the period from 6 April 2010 to 5 April 2011. As confirmation of your income from self-employment you can send a letter from your accountant.

If you cannot give us the amounts, you should give an estimate and write 'E' beside the amount on the form.

If you are a company director, send your P60, P11D or independent confirmation of your earnings and director's fees from a chartered or certified accountant or HM Revenue & Customs (HMRC).

**b6** Include here any other income you have received, for example:

- state or personal pensions. For personal pensions, please send your P60 or a letter from your pension provider showing your pension payments during the period 6 April 2010 to 5 April 2011;
- scholarships, studentships, exhibitions, bursaries, awards, grants and allowances not already given above;
- other payments you receive for attending your course during the academic year;
- any payments from an employer releasing you for your study during the academic year. (Please read the note on academic years on page 7);
- any salary or wages that you will receive from your employer while you are studying for your course. This includes work you finish before the course begins, or work you are paid for in advance which you will do after your course ends;
- fostering or boarding-out allowances where these are regular payments that foster carers receive to meet the cost of keeping a child; or
- for taxable benefits in kind please send your P11D.

**c** If you are a student who entered higher education **before 1 September 2005**, you need to provide details of any dependent children except if:

- they are your same sex partner's children; or
- they are your opposite sex partners children if you are under 25.

If you are a student who entered (or is entering) higher education **on or after 1 September 2005**, you need to provide details of any child that you have parental responsibility for regardless of whether they are your or your partner's child.

## Declarations

If either the student or the person named in section 7 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 (DEL) 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 entitlement to financial support.

The most common changes of circumstance would be if:

- the student is absent from the course for more than 60 days because of illness;
- the student is absent for any other reason;
- the student leaves, abandons or is expelled from the course;
- the student stops attending the course and does not intend, or is not allowed, to return for the rest of the academic year;
- the student transfers to a different course at the same, or a different, university or college;
- the student transfers from a part-time to a full-time course;
- the student repeats part or all of a year of their course;
- the date of the start or end of the student's course changes;
- the student's household income changes; or
- the student's 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, the 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 the student may be entitled will be delayed.

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