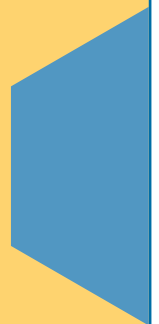
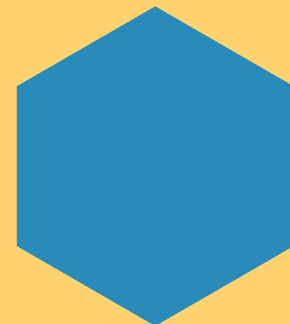
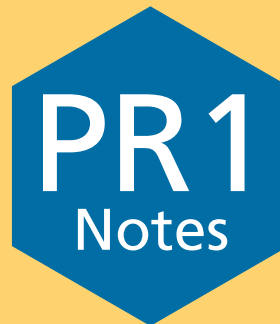


Notes for Student Finance application for continuing students **2020/21**





You can apply online at www.studentfinancenl.co.uk

Student Finance NI is a partnership between the Education Authority (EA) and the Student Loans Company Ltd (SLC) for delivering financial support to students on behalf of the Department for the Economy (DfE) Northern Ireland.

You should **not** complete the PR1 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:
 - Student Finance England (SFE)
 - Student Finance Wales (SFW)
 - Student Awards Agency 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 complete a 'Tuition Fee Loan, Tuition Fee Grant and Course Grant application form for new and returning part-time students' (PTL) to apply for student finance.
- 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 go to www.studentfinancenl.co.uk for more information.
- 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 **0300 100 0077**.
- You will be starting a course in a health related discipline and you are eligible to apply for a bursary from the National Health Service (NHS), SAAS or the Department of Health (DoH) 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 Study USA Scheme.
- You are on a year's optional placement

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. 

Section 1 - finance available

Maintenance Grant **NOT REPAYABLE**

You may not be eligible for a Maintenance Grant if you already hold an honours degree or overseas equivalent unless you are taking a particular vocational degree.

The amount of Maintenance Grant you receive is dependent on your household income and will affect the amount of Maintenance Loan you are entitled to. You will not be eligible for a Maintenance Grant if you are eligible to receive Special support Grant.

If you will be studying on a postgraduate Initial Teacher Training (ITT) course and choose not to provide any financial information you may 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**

You may not be eligible for a Special Support Grant if you already hold an honours degree or overseas equivalent unless you are taking a particular vocational degree.

The amount of Special Support Grant you receive is dependent on your household income. Entitlement is calculated in the same way as Maintenance Grant but will not affect the amount of Maintenance Loan you may be entitled to receive. If you are eligible to receive Special support Grant you will not be eligible to receive Maintenance Grant.

The Social Security Agency will not take account of Special Support Grant when assessing any claim you make for income related benefits.

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

- Are a lone parent or foster 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 week
- Have a disability and qualify for income-related Employment and Support Allowance
- Are waiting to return to the same course within the same academic year 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
- Are eligible for Housing Benefit or the housing element of universal Credit whilst you're studying
- Are entitled to Armed Forces Independence Payment (AFIP)
- Are entitled to a Personal Independence Payment or Disability Living Allowance

e 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 PR1 form or download a Special Support Grant application form at www.studentfinanceni.co.uk

If you are unsure about your eligibility for Special Support Grant, call our Customer Support Office on **0300 100 0077** for help.

Section 1 - finance available

Continued

Maintenance Loan **REPAYABLE**

You may not be eligible for a Maintenance Loan if you already hold an honours degree or overseas equivalent unless you are taking a particular vocational degree.

The amount of Maintenance Loan you receive is dependent on your household income.

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

Tuition Fee Loan **REPAYABLE**

You may not be eligible for a Tuition Fee Loan if you already hold an honours degree or overseas equivalent.

Any Tuition Fee Loan that you borrow will be paid directly to your university or college in three instalments within the academic year. Each payment is made after we receive confirmation that you are in attendance at the start of each term.

You can borrow a Tuition Fee Loan up to a maximum of £4,395 if you are studying in Northern Ireland, or £9,250 if studying elsewhere in the UK. If you are studying at a private university or college you can borrow a maximum of £4,395. The amount of Tuition Fee Loan you can borrow will depend on how much your university or college is charging you. You should confirm the amount with your university or college before making your application.

Student Contribution Loan **REPAYABLE**

If you are studying on an undergraduate higher education course at a relevant institution of higher education in the Republic of Ireland you won't pay any tuition fees. Instead, you will have to pay a student contribution charge to your university or college. You can apply for a Student Contribution Loan to cover the amount charged.

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, aged 25 and over and 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**

Full-time students studying at a university or college in Northern Ireland who are eligible for the full £3,475 Maintenance Grant or Special Support Grant, and who are being charged tuition fees of up to £4,395, can apply to their institution for a minimum bursary of £393.

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

Continued

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. The support you receive is dependent on your household income.

If you apply for student finance which is not based on your household income you are not eligible to claim a travel grant.

You may also be able to get help to cover the cost of medical insurance, visa costs and vaccinations. These costs aren't affected by household income assessment.

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

You can download or request forms to complete about your travel costs.

Contact your local Student Finance (SFNI) office to find out you are eligible to apply.

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 husband, wife, civil partner or cohabiting partner receives the childcare element of Working Tax Credit or Universal Credit, Tax-Free Childcare from HM Revenue & Customs (HMRC), a healthcare bursary or Scottish Healthcare Allowance. You have to choose one or the other.

You can find out more about Childcare Grant at www.studentfinancenl.co.uk and more information about Working Tax Credit at www.nidirect.gov.uk

Section 1 - finance available

Continued

Disabled Students' Allowances (DSAs) **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 an 'Application for Disabled Students' Allowances' (DSA1) form instead of this form. You can download a DSA1 application form at **www.studentfinancenl.co.uk**

Alternatively, you can complete sections 1-3 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.

If you provide evidence of your disability such as a letter from your doctor or a completed Disability Evidence Form, or if you have dyslexia or dyscalculia, 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.

If you are otherwise undertaking, but not attending a course in person for a reason which relates to your disability, you may be able to 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 'Disabled Students 2020/21 Bridging the Gap A guide to the DSA Students' Allowances (DSAs) in Higher Education'.

Further information

You can find more information in the following guides available at **www.studentfinancenl.co.uk**

- '2020/21 A guide to Financial Support for Full Time Students in Higher Education'
- '2020/21 Terms and Conditions - Student Loans - A guide to terms and conditions'
- '2020/21 How you are Paid - Full-Time Higher Education Student Finance - A guide to Entitlement to Support and Payment'
- '2020/21 DSA students - Bridging the gap: A guide to the Disabled Students Allowances (DSAs) in Higher Education'
- '2020/21 Dependants Grants - A guide to Dependants Grants for full time student parents in higher education'

Alternative formats

You can order forms and guides in Braille, large print or audio. You can either:

- email your name, address and customer reference number along with what form and format you require to **brailleandlargefonts@slc.co.uk**; or telephone us on **0141 243 3686**

The above email address and telephone number can only deal with requests for alternative formats of forms and guides.

Section 2 - personal details

Contact details

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

If your address changes you should let us know as soon as possible.

Relationship status

- c** You should tick 'Single' if you have never been married or in a civil partnership and are not living with a partner.

You should tick 'living with a partner' if you are sharing a home with your partner but you are not married or in a civil partnership with them. You should tick this box if you have previously been separated, divorced or widowed but are currently living with a partner. 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 a copy of your marriage certificate or civil partnership documentation with your application.

- 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, decree nisi, dissolution order or a letter from your solicitor confirming your status and date of separation.

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

Armed Forces

- d** You may be eligible for support to study a distance learning course outside of Northern Ireland if you or your family member (who you live with) is currently serving outside of Northern Ireland in one of the following:

- The Naval Service (Royal Navy and Royal Marines)
- The Army
- The Royal Air Force
- The Royal Military Police
- The Gurkhas

The following family members will be eligible students:

- A spouse or civil partner living with a member of the UK Armed Forces serving outside of Northern Ireland
- A child, step-child or adoptive child living with a member of the UK Armed Forces serving outside of Northern Ireland
- A dependant parent living with either;
 - A child who is a member of the UK Armed Forces serving outside of Northern Ireland
 - The child's spouse or civil partner who is a member of the UK Armed Forces serving outside of Northern Ireland

Section 3 - about your course and your university or college

Course details

- e1** If the new course details you give us can't be confirmed yet, your student funding may be delayed.
- e2** You must complete the section with the correct year of course which you will be following in 2020/21. For example if you are repeating year one tick 'first year' rather than 'second year' which does not mean the second year of study but the second year of the course.

Course type

- f** A part-time undergraduate ITT course is a first degree course. If you are applying for support for a part-time Postgraduate Certificate in Education (PGCE), part-time Certificate in Education (CertEd) or part-time Diploma in Education and Training (DET) 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.

- g1** If you are eligible to apply 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 DoH.

If you're studying on a Paramedic course at an English university/college and are eligible to apply for tuition fee and/or living cost support from your local ambulance/health trust, you should answer yes to this question.

Students studying an Allied Health Professional course at Ulster University or students who have reached their fifth year of study on a medical or dental course will have their DoH bursary entitlement assessed by their local SFNI office using the information provided on the PR1 application.

- g2** 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 then 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.

If you are unsure about your eligibility for a bursary, contact your local SFNI office.

Term details

- i** Do not count any period spent studying in the Republic of Ireland (ROI) as a term abroad. If you are studying abroad you should speak to your university or college to confirm your tuition fee before completing the loan request section of the form.
- 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.
- You should select 'Work placement' if you will be working in the UK/ROI or abroad as part of your course during this academic year or if your placement is part of a sandwich course.

Placement details

- k** If you don't know where your placement will be yet you should let us know as soon as you find out. The tuition fee amount you may be charged will vary depending on the type of placement and where in the UK the university or college you normally attend is located. If you're on a placement you should speak to your university or college who will be able to confirm your tuition fee amount.
- If you're on a paid placement, or an unpaid placement that is not listed, then you will only be entitled to a reduced rate Maintenance Loan and no Maintenance Grant.
- If you're on a year's optional placement you are not eligible for any support.

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 or letter
- 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.

Payment will be made when we receive confirmation from your university or college that you have registered on the course.

Interest will be charged from the day you receive your first payment.

Tuition Fee Loan

Your Tuition Fee Loan will be paid directly to your university or college in three instalments within the academic year.

You will be liable for your Tuition Fee Loan from the first day of each term not the date when the instalment is paid to your university or college. If you are unsure when your term starts please contact your university or college.

Liability Date	% of total Tuition Fee Loan that you will be liable for
First day of Term 1	25%
First day of Term 2	50%
First day of Term 3	100%

Each payment is made after we receive confirmation from your university or college that you are in attendance at the start of each term. Interest will be charged from the day we pay the Tuition Fee Loan to your university or college.

Student Contribution Loan

If you're studying on an undergraduate higher education course at a relevant institution of higher education in the Republic of Ireland you will have to pay a student contribution charge. To cover this charge you can apply for a Student Contribution Loan which is paid in Euros to your university or college. Your university or college can charge up to a maximum of €3000.

You can apply for a Student Contribution Loan to cover all or part of the student contribution charge. If you choose to apply for less than the maximum amount you should use the exchange rate shown on our website at www.studentfinancenico.uk to work out the equivalent in Sterling.

If you apply for a Student Contribution Loan to pay part of your student contribution charge, you'll be responsible for paying the difference to your university or college.


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

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

You can apply for a Maintenance Loan, Tuition Fee Loan or a Student contribution Loan; or change the amount you originally requested at www.studentfinancenico.uk

Section 5 - dependent and independent students

a3 Having 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.

 Please send copies of the child's/children's long 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 be considered irreconcilably estranged from your parents if you have not had verbal or written contact with both of your biological or adoptive parents, or your only living parent for twelve months or more before the start of your academic year, and this will not change. If you tick that you are irreconcilably estranged from your parents we will contact you to ask for evidence.

You will **not** be considered irreconcilably estranged from your parents 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.

For more information on estrangement refer to the 'Stand Alone' booklet available on our website at www.studentfinancenl.co.uk

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

b1 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.

c Dependent children

e You must send copies of your child's/children's long 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.

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

Don't include income from sources such as Child Benefit, Child Tax Credit, Government Child Trust or minimal sums of money from other sources when entering a child's income.

You must send copies of evidence showing the child's income.

e If your child's income will be at least 5% less than it was in tax year 2018-19 you can apply for a current year income assessment. This means we would use their expected income for tax year 2020-21 instead of their actual income for tax year 2018-19 when working out your grant entitlement. If you want to be assessed using expected income for tax year 2020-21 please use the additional notes pages of the form to let us know. You still need to give your child's income for tax year 2018-19.

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

c This information will be used to work out if your children are mainly financially dependent on you or your partner during this academic year. The academic year is determined by when you begin your study, see page 19 for the dates.

d If you apply for Childcare Grant you will be sent another form for you to give us your childcare details and estimated costs. You can find further information about Childcare Grant at www.studentfinanceni.co.uk and information about all aspects of Working Tax Credit at www.nidirect.gov.uk

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

- e4** If your adult dependant's income will be at least 5% less than it was in tax year 2018-19 you can apply for a current year income assessment. This means we would use their expected income for tax year 2020-21 instead of their actual income for tax year 2018-19 when working out your grant entitlement. If you want to be assessed using expected income for tax year 2020-21 please use the additional notes pages of the form to let us know.
- e** You still need to give your adult dependant's income details for tax year 2018-19. Send copies of evidence of any taxable income received by your adult dependant, for example, P60, letter from employer confirming earnings or month 12/week 53 payslip.
- f** 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.
- e** You will have to provide documentary evidence of any obligations you declare. The academic year is determined by when you begin your study, see page 19 for dates.

Section 8 - about family

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.

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.

Independent students

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

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.

- b** You should tick 'Single' if the parent you normally live with has never been married or in a civil partnership and is **not** living with their partner. You should tick 'living with a partner' if your parent have been previously been separated, divorced or widowed but are currently living with a partner.
- 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, decree nisi, dissolution order, or a letter from their solicitor confirming their status and date of separation. If full income details are not provided by parent(s) or parent and partner this could result in an overpayment of support.

If your parent is separated or divorced and now living with a partner, their partner must tell us their income details in section 9.

Terms and Conditions

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

Privacy Notice

The Student Loans Company Ltd (SLC) and the Department for the Economy are joint Data Controllers under the Data Protection Legislation. 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.

For further details about the way your information is used, who is responsible for it and the rights you have in connection with it, please refer to our full Privacy Notice available online at www.studentfinancenl.co.uk/privacy-notice

If you don't have internet access, please call us on **0300 100 0077** and we can send a copy to you.

Change of circumstances

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

You are not eligible for funding when you are not in attendance. Any overpayments must be repaid immediately or will be deducted from your next year's support

The most common change of circumstances for students would be if:

- you are absent from the course for more than 60 days, including for reasons related to illness
- 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.

If any of your course details change, or you suspend, withdraw or transfer you must speak to your university or college and ask them to notify your local SFNI office immediately. You can still make changes to your personal details online. Just log into your account at 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 the Economy, your local SFNI office or SLC for access to information you provide in connection with this application for student finance (whether on this form or at a later date).

Section 9 - financial details for tax year 2018-19 for parents and partners

These notes will help you to complete section 9 of the application form. You can find out more about how your information is used to assess how much student finance the student can get by reading the booklet '2020/21 How you are Paid - Full Time Higher Education Student Finance - A guide to Entitlement to Support and Payment' available at www.studentfinanceneni.co.uk

What happens if my household income has changed since tax year 2018-19?

If your total household income (before tax) for tax year 2020-21 will be at least 5% less than it was in tax year 2018-19, you need to complete this section **and** a 'Current Year Income Assessment (CYI) Form'.

You must be accurate when submitting figures as any overpayments will be taken off the next year's funding.

The Current Year Income Assessment Form will be available to download at www.studentfinanceneni.co.uk from April 2020.



Please note that a current year income assessment cannot be carried out unless you provide your financial details for tax year 2018-19.

If you are Self Assessed

If you completed an online tax return

You should refer to your saved online tax return for the income figures required in this section.

If you completed a paper tax return

There's an online guide to help you answer the questions in this section which you can download from www.studentfinanceneni.co.uk

Part B - Your financial information

Please give evidence for tax year 2018-19. Normally, this is the year ending 5 April 2019, 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 amount in both foreign currency and equivalent in pounds sterling.

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

a Total income from salary/wages

You should refer to your 2018-19 P60 or final payslip for your income from salary/wages. If as part of your salary or wages for the tax year 2018-19 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.

b Taxable state benefits

You should refer to your 2018-19 P60 or P45 from the Social Security Agency for your taxable state benefit details. 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 9 - financial details for tax year 2018-19 for parents and partners

Continued

c&d Occupational/private pension

If you received an occupational or private pension, you should refer to your P60P or annual statement from your pension provider.

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 tax year 2018-19, 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):

- Gross UK interest (before tax has been deducted)

You must include interest you receive on bank, building society and other savings accounts unless it is specifically non-taxable, for example, a non-taxable Individual Savings Account (ISA) etc.

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

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

b Income from UK life insurance gains, securities and partnerships

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 ISAs
- Your share of taxed interest etc.
- Total untaxed savings income taxable at 20%
- Taxed income taxable at 10%
- Taxed income taxable at 20%

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

Section 9 - financial details for tax year 2018-19 for parents and partners

Continued

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
- Interest and other income from overseas savings
- Dividends from foreign companies
- Dividend income received by a person overseas

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 tax year 2018-19. Add together all the benefits in kind you received and write your total figure on the form.

Benefit in kind

Assets placed at employee's disposal (cars, property, goods or other assets)

Payments made on behalf of employee

Vouchers and credit cards

Living accommodation

Mileage allowance and passenger payments

Total cash equivalent of all cars/vans made available

Total cash equivalent of fuel for all cars/vans made available

Cash equivalent of loans after deducting any interest paid by the borrower

Private medical treatment or insurance

Qualifying relocation expenses payments and benefits

Services supplied

Assets placed at employee's disposal

Other items (including subscriptions and professional fees)

Expenses payments made to, or on behalf of, the employee

Section 9 - financial details for tax year 2018-19 for parents and partners

Continued

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 adjusted profit from businesses

You should include the income type below as your answer for the total amount of adjusted profits you received from self-employment during tax year 2018-19.

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

b Total adjusted profit from partnerships

You should include the income type(s) below as your answer for the total adjusted profit you received from partnerships during tax year 2018-19.

- Share of total taxed and untaxed income other than that taxable at 10% and 20%
- Your share of total adjusted profit from the partnerships

Q2 Minister of religion

Tell us about the amount of income you received from the following income type during tax year 2018-19.

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

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 tax year 2018-19 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
- Lump sums or benefits received from an Employer Financed Retirements Benefit Scheme excluding pensions
- Redundancy and compensation for loss of job

Section 9 - financial details for tax year 2018-19 for parents and partners

Continued

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 tax year 2018-19 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

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 tax year 2018-19 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

Section 9 - financial details for tax year 2018-19 for parents and partners

Continued

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 tax year 2018-19 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)

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 tax year 2018-19 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)

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 tax year 2018-19 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)

Section 9 - financial details for tax year 2018-19 for parents and partners

Continued

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 tax year 2018-19 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
- 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

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 2020 and 31 December 2020 inclusive
1 January 2021 and 31 March 2021 inclusive
1 April 2021 and 30 June 2021 inclusive
1 July 2021 and 31 July 2021 inclusive

Academic year

1 September 2020 to 31 August 2021
1 January 2021 to 31 December 2021
1 April 2021 to 31 March 2022
1 July 2021 to 30 June 2022

Q1 The child dependant's income is required to assess eligibility for deductions in the calculation of household income for each child who 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 by visiting www.studentfinancenl.co.uk

Please do not include income from sources such as Government Child Trust, State Child Benefit, Child Tax Credit 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 attorney will be accepted.

Change of circumstances

You must notify your local SFNI office 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 or co-habiting 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 the Economy, your local SFNI office or Student Loans Company Ltd (SLC) for access to information you provide in connection with any application for student finance for academic year 2020/21 (whether on this form or at a later date).

Privacy Notice

SLC and the Department for the Economy are joint Data Controllers under the Data Protection Legislation. 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.

For further details about the way your information is used, who is responsible for it and the rights you have in connection with it, please refer to our full Privacy Notice available online at

www.studentfinancenl.co.uk/privacy-notice

If you don't have internet access, please call us on **0300 100 0077** and we can send a copy to you.