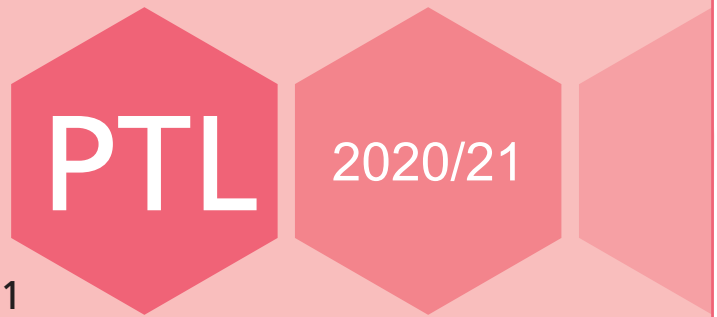


PTL Notes

Tuition Fee Loan, Tuition Fee Grant and Course Grant application notes for new and returning part-time students 2020/21



About these notes

These notes should be read with your part-time Tuition Fee Loan, Tuition Fee Grant and Course Grant application form.

Returning your form

Send your completed form and any documents to:

Student Finance NI – Part-Time office
Ballee Centre
Ballee Road West
Ballymena
BT42 2HS

Timescale for returning your form

Your form should be returned within nine months of the start of your academic year, otherwise you may lose your entitlement to student finance.

Make sure you pay the correct postage.

Find out more

You can find out more information about part-time student finance by:

- going to: **www.studentfinancenl.co.uk**
- reading our part-time guides
- speaking to your university or college
- calling us on **0300 100 0077**

Other information

The Student Loans Company Limited (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/privacynotice

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

Other information – continued

Alternative formats

You can order forms and guides in Braille, large print or audio by emailing your name, address and Customer Reference Number, if you have one, along with what form and format you require to: brailleandlargefonts@slc.co.uk or you can call us on **0141 243 3686**. Please note the email address and telephone number can only deal with requests for alternative formats of forms and guides.

Section 1 - your details

1.1 Customer Reference Number



Your Customer Reference Number is your personal reference number and is 11 digits long. You'll have one of these if you've previously had a student loan or any other student finance from the Student Loans Company Limited (SLC) or the Education Authority. You may also have one if you've given financial information for another student's application. If you don't have one, or don't know what your Customer Reference Number is, leave this blank.

1.2 Personal details



If you have been granted leave to remain as a Stateless Person, you can answer 'None' or 'Stateless' in the Nationality box.

1.3 National Insurance number



If you have a National Insurance number but don't provide it, payment of your loan(s) will be withheld and you'll have to fund your own tuition fees until you've resolved this.

You'll 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've never been given a National Insurance number, leave the National Insurance number boxes blank. We'll contact you if you need to take any action to obtain a National Insurance number.

1.4 Expired UK/ROI passport



If your UK/ROI passport has expired you'll need to send other documents to prove your identity.

1.5 Valid UK/ROI passport



You need to provide your valid UK passport details on the form **or** send us your original valid ROI passport.

Evidence - If you provide your UK passport details, you do not need to send your passport to us.

If you send us your original valid ROI passport, we will return your document as soon as possible.

Section 1 - your details continued

1.7 Non-UK passport, Biometric Residence Permit or Birth/Adoption Certificate form



If you don't have a valid UK/ROI passport you must send:

- your original non-UK passport or Biometric Residence Permit; **or**
- your original UK or ROI birth or adoption certificate (this would include a UK birth certificate issued by a British Consulate abroad) and a completed Birth/Adoption Certificate form.

The Birth/Adoption Certificate form contains two separate declarations. The Declaration of Identity must be signed by yourself to confirm your identity. The Identity Confirmation is to verify your identity and must be completed by a person of good standing in the community (for example, a teacher, solicitor, civil servant or police officer) who has known you for at least two years.

You can download a Birth/Adoption Certificate Declaration form at www.studentfinanceni.co.uk

Please use your full name, as it appears on your passport or birth certificate. If your name has changed from the name that appears on your birth certificate or passport - please send the relevant evidence confirming this and give details of any previous names you have had in the additional notes section at the back of the PTL form.

If you have lost your birth certificate you should get a replacement by contacting the Register Office in the sub-district where your birth was registered.

We will only use your Biometric Residence Permit to validate your identity, no other data from it will be used or stored.

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

1.8 Marital status



Your partner is defined as follows:

- your husband/wife
- your civil partner
- your opposite sex partner if you live with your partner as though you were married or in a civil partnership **or**
- your same sex partner if you live with your partner as though you were married or in a civil partnership.

Separated, divorced or dissolved civil partnership

Widowed or surviving civil partner



You need to send:

- Decree Absolute **or**
- Dissolution order **or**
- a letter from your solicitor confirming your status
- original death certificate

If you have previously sent the evidence above you do **not** have to send it again.

Section 2 - previous support and qualification history

2.3 Honours degree from a UK, ROI or overseas educational institution



If you already hold an honours degree from a UK, ROI or overseas institution you will not be eligible for any part-time grants or Tuition Fee Loan.

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; or
- you hold a qualification that is not a first degree (for example, HND, HNC or Dip HE)

Section 3 - your residency information

3.1 UK or ROI national



Armed Forces

If you, your parents or partner are members of the Armed Forces, you must apply for student finance in the UK country where you/they enlisted unless they are permanently living in another area of the UK.

3.2 EU national



You need to send your passport or National Identity card.

3.3 Child of a Swiss national



To get student finance as the child of a Swiss national, your Swiss national parent must be living/have lived in the UK on the first day of the academic year. Go to the residency history section on page 10 to find out when your academic year starts.

Section 3 - your residency information continued

3.3 Child of a Swiss national



You need to send us:

- your parent's passport **or** National Identity card **and** your birth certificate or equivalent.

Also send a letter signed by your parent to confirm they are/were living in the UK on the first day of your academic year, stating their UK address, with one of the following:

- Bank statement
- Payslip (showing home address)
- Tenancy Agreement/Mortgage Statement
- Recent utility bill
- Local Authority correspondence
- Government department correspondence

3.4 EEA or Swiss national



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

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



You need to send us your:

- passport or National Identity card.

For employment of EEA or Swiss national send **one** of the following:

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

Section 3 - your residency information continued

3.5 Child of a Turkish Worker



To get student finance as the child of a Turkish Worker, your Turkish parent must be working in the UK on the first day of your course.



Send us:

- your parent's passport or National Identity card

We also need evidence of your Turkish parent's employment in the UK, send us:

- a contract of employment

3.6 'Settled status'



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

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

- you are a British citizen or ROI national
- 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 Home Office.



You need to send your:

- UK or ROI passport **or**
- Biometric Residence Permit **and**
- a letter from the Home Office which confirms immigration status.

We will only use your Biometric Residence Permit to validate your identity, no other data from it will be used or stored.

Section 3 - your residency information continued

3.7 'Refugee status'



If you or your:

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

have successfully applied for refugee status in the UK under the terms of the 1951 UN Convention relating to the Status of 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.

If you're claiming student finance as the child or step-child of a refugee, you'll 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're 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/they haven't been given an expiry date you should mark the expiry date box as N/A (not applicable).



You need to send us:

- a Home Office letter and an immigration status document, normally a passport or Biometric Residence Permit of the person who holds refugee status **and**
- evidence to confirm your relationship to the person who has been granted refugee status.

Section 3 - your residency information continued

3.8 'Leave to enter or remain'

Expiry date



If you or your:

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

has been granted 'leave to enter or remain' in the UK as a result of a failed asylum application or discretionary leave where no application for asylum has been made the Home Office will have sent you/them a letter and an immigration status document confirming this. Where applicable this letter should also tell you/them when the leave to enter or remain status is due to expire.

If you're 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're 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.

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



You need to send us:

- a Home Office letter and an immigration status document, normally a passport or Biometric Residence Permit of the person who has been granted leave to enter or remain **and**
- evidence of your relationship to the person who has been granted leave to enter or remain if it is not you.

We will only use your Biometric Residence Permit to validate your identity, no other data from it will be used or stored.

Section 3 - your residency information continued

3.9 Stateless Person



If you or your:

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

have been granted leave to enter or remain as a Stateless person in the UK, you or they will have received a letter and an immigration status document from the UK Home Office confirming this.

If you are claiming student finance as the child or step-child of a person granted leave to enter or remain as a Stateless Person, 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 UK 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 as a Stateless Person, you must have been their husband, wife or civil partner at the time of their application.



You need to send us:

- a Home Office letter and an immigration status document, normally a passport or Biometric Residence Permit of the person who has been granted leave to remain as a Stateless Person **and**
- evidence of your relationship to the person who has been granted leave to remain as a Stateless Person if it is not you.

We will only use your Biometric Residence Permit to validate your identity, no other data from it will be used or stored.'

3.10 'Leave to enter or remain' under section 67 of the Immigration Act 2016



If you have been granted 'leave to enter or remain' in the UK under section 67 of the Immigration Act 2016 or are the dependent child of someone who has, you will have received a letter and an immigration status document from the UK Home Office confirming this.



You need to send us:

- a Home Office letter and an immigration status document, normally a passport or Biometric Residence Permit of the person who has been granted leave to enter or remain under section 67 of the Immigration Act 2016 and
- evidence of your relationship to the person if you are the dependent child of someone who has been granted leave to enter or remain in the UK under section 67 of the Immigration Act 2016.

We will only use your Biometric Residence Permit to validate your identity, no other data from it will be used or stored.

Section 3 - your residency information continued

3.12 Residence history



Academic years begin in the autumn, winter, spring and summer, and last for 12 months. Use this table to work out when your academic year begins.

| If you start your course between | Your academic year will begin |
|----------------------------------|-------------------------------|
| 1 August – 31 December inclusive | 1 September 2020 |
| 1 January – 31 March inclusive | 1 January 2021 |
| 1 April – 30 June inclusive | 1 April 2021 |
| 1 July – 31 July inclusive | 1 July 2021 |

Section 4 - your part-time course

4.2 Full course name



You should check the name of your course with your university or college. If the course details you give us can't be confirmed yet, your student funding may be delayed.

Only designated courses are eligible for support. Your university or college should be able to tell you whether your course is a designated course.

4.7 Course length



You should answer this 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 four times 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 2020/21' for information on Tuition Fee Grant rates applicable depending on your study rate.

4.8 Current year of course



You should tell us what year of your course you're going into, not the year of your studies.

For example if you're repeating the first year of your course, you should answer 'first'.

Section 4 - your part-time course continued

4.9 Tuition Fee amount charged



If you're not sure how much you're being charged for tuition fees, speak to your university or college to find out. You must specify an amount for your form to be accepted.

4.10 Distance learning



Don't 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.

Don't 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 **0300 100 0077** for advice. If you are not sure, your university or college will tell you whether your course is designated as distance learning or not.

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

Armed Forces

Section 4 - your part-time course continued

4.10 Distance learning



If you are in the Armed Forces

You need to send a letter confirming your name, your address (or BFPO address) and which country you were ordinarily resident in before you were based at your current location.

If your family member is in the Armed Forces, you need to send a letter confirming the following:

- their name
- their address (or BFPO address)
- your name
- their relationship to you
- where they're currently based
- if you have been ordinarily resident in the UK, which country they were ordinarily resident in before they were based at their current location
- if you've never been ordinarily resident in the UK, which country they signed up for the Armed Forces in.

The letter you send must be signed, stamped and dated by the Armed Forces Unit Records Office.

Section 6 - your loan request

6.1 Loan payments



We'll pay your Tuition Fee Loan directly to your university or college in three instalments within the academic year. The first payment of the Tuition Fee Loan is made after we receive confirmation from your university or college that you're in attendance on your course.

Loan liability



You'll be liable for your Tuition Fee Loan two weeks after the first day of term 1, and at the start of terms 2 and 3, not the dates the instalments are paid to your university or college.

| Liability | % of total Tuition Fee Loan that you'll be liable for |
|-----------|---|
| Term 1 | 25% |
| Term 2 | 50% |
| Term 3 | 100% |

Interest



Interest is added to your loan balance from the day the first loan payment is made to your university or college. You can find out more about this and the current interest rate at www.gov.uk/repaying-your-student-loan

Changing your loan amount



You can change the amount of loan you originally requested by completing a Tuition Fee Loan Request form. The Tuition Fee Loan Request form is available to download at:

www.studentfinanceni.co.uk or call us on **0300 100 0077** to request a copy.

Section 8 - financial details

8.1 State benefits



If you are not married or in a civil partnership, but are living with a partner as defined in section 1, question 1.8 of these notes, we will take your partner's income into account.



You need to send us evidence of the benefit received by you or your husband, wife, civil partner or partner. **You do not need to provide any other financial details.**

Send us:

- a photocopy of the document you received from the agency or authority telling you about the benefit; **or**
- a completed 'Confirmation of benefits' (CB1) form with your application.

The evidence you send must show entitlement to benefit at the time of your application.

You can download a copy of form CB1 from www.studentfinancenl.co.uk or call us on **0300 100 0077** to request a copy.

8.2 Gross income from salary or wages



Your gross income means income before deductions from:

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

We require these figures for tax year 2019-20, normally this will be the year ending 5 April 2020, but this may differ if your employer or business has a tax year which doesn't end in April, or you start your course in July.

Also include any income you received in 2019-20 from employment overseas or any other income you get from abroad which is not covered by UK tax as well as any of the benefits asked for.

Don't include any of the following:

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

Section 8 - financial details continued

8.2 Gross income from salary or wages



Evidence of your earnings can be:

- P60 for 2019-20;
- payslips for month 12 or week 53 showing 'Total paid to date' for earnings in the period 6 April 2019 to 5 April 2020;
- a letter from your employer confirming your earnings;
or
- written details of all benefits in kind you receive.

8.3 Income from self-employment



Give the details shown on your self-assessment form for your trading year which ends during the period from 6 April 2019 to 5 April 2020.

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



Evidence of your income from self employment can be:

- a photocopy of your self assessed tax return **or**
- a letter from your accountant confirming your income

If you're a company director send:

- a photocopy of your P60 **and/or**
- a photocopy of your P11D **or**
- independent confirmation of your earnings and directors fees from a chartered or certified accountant or HMRC.

8.4 Bank and building society gross interest



Evidence of your income from bank/building society gross interest can be:

- bank or building society statements

8.5 Other investment income



Evidence of your income from other investments can be:

- bank or building society statements **or**
- annual statement of interest **or**
- dividend vouchers

Section 8 - financial details continued

8.6 Income from property lettings or rent



Evidence of your income from property, lettings or rent can be:

- a photocopy of your self assessed tax return **or**
- a letter from your accountant confirming your income

8.6.1 Rent a Room scheme



We need to know how much of your income from property, lettings or rent is through the Rent a Room scheme as any income from this scheme up to £7,500 per year is tax-free. This means any income from the Rent a Room scheme under this threshold won't count as income for your student finance assessment.



Evidence of your income from the Rent a Room scheme can be:

- a photocopy of your self assessed tax return; **or**
- a letter from your accountant.

8.7 Other income types



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 2019 to 5 April 2020;
- 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 10);
- 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;
- redundancy payments or compensation for loss of job. You must include the full amount of your redundancy payment, even if you don't expect to pay tax on it;
- 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.

Section 8 - financial details continued

8.7 Other income types



If you've declared any other income types, you need to send us photocopies of evidence to confirm the total amount received during the 2019-20 tax year.

8.8 Dependent children



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.

Section 9 - your UK bank or building society account details

9.1 Bank 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
- 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 10 - Terms and conditions

Power of Attorney



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.

Section 10 - Terms and Conditions continued

Change in your circumstances



You must notify the EA 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 for reasons related to illness;
- the student is absent for any length of time for reasons not related to illness (or 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.