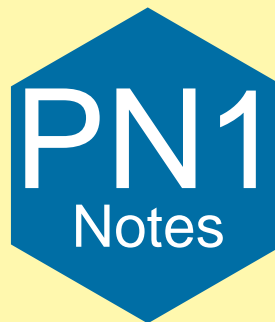


# Notes for Student Finance Application 2022/23





You can apply online at [www.studentfinanceneni.co.uk](http://www.studentfinanceneni.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 PN1 form if any of the following apply to you:

- You normally live in Wales, Scotland, England, the Channel Islands or the Isle of Man, but you have moved or will be moving to Northern Ireland to attend this course. If this is the case, you should contact whichever of the following organisations is relevant:
  - Student Finance Wales (SFW)
  - Student Awards Agency Scotland (SAAS)
  - Student Finance England (SFE)
  - The Education Department of Guernsey or Jersey
  - The Education Department for the Isle of Man
- You are studying on a distance learning course for a reason which is not related to a disability. If this is the case, you should complete an 'Application for grants for part-time study' (PTL) form to apply for student finance.
- You are eligible for fee only support as a result of your nationality, residence or course details.
- You are, or will be attending a part-time higher education course other than for Initial Teacher Training (ITT). In some circumstances, you may qualify for help if you are taking a part-time course. For more information you should phone our Customer Support Office on **0300 100 0077**.
- You will be starting a course in a health related discipline and will be 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 must use these notes whenever you see this icon within the main PN1 form. 

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

Your evidence should be sent to your local Student Finance (SFNI) office at the same time as your application.

## 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 foreign 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 a Special Support Grant.

If you will be studying on a postgraduate Initial Teacher Training (ITT) course of a year or more and choose not to provide any financial information you 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 foreign 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 or on an approved course
- Have a disability, and qualify for the Disability Premium or Severe Disability Premium
- Are deaf and qualify for Disabled Students' Allowance
- Have been treated as incapable of work for a continuous period of at least 28 weeks
- Have a disability and qualify for income-related Employment and Support Allowance
- Are 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 PN1 form or download a **Special Support Grant application form at [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)**

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

### Maintenance Loan **REPAYABLE**

You may not be eligible for a Maintenance Loan if you already hold an honours degree or foreign 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 will be reduced.

## Section 1 - finance available continued

### Tuition Fee Loan **REPAYABLE**

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

The maximum tuition fee amount you are charged by your university or college may vary depending on which country you are studying in. If you are unsure about the tuition fee amount you will be charged, please contact your university or college.

If you will be starting a course at a university or college in Northern Ireland in this academic year you can apply for a Tuition Fee Loan to cover the amount of tuition fees that your university or college will charge you, up to a maximum of £4,630.

If you will be starting a course at a university or college in England, Wales or Scotland in this academic year you can apply for a Tuition Fee Loan to cover the amount of tuition fees that your university or college will charge you, up to a maximum of £9,250 or up to £11,100 for an accelerated degree.

There is no cap on the tuition fee amount a private university or college can charge. If you are studying at a private university or college, and your course qualifies for tuition fee support, you can only apply for a Tuition Fee Loan up to the maximum of £4,630. You will have to fund any additional tuition fee over this amount yourself.

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 from your university or college that you are in attendance at the start of each term.

### 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.

If you are unsure whether you are attending a relevant institution, check with Student Finance.

### 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, if you are 25 or over and are living with a partner of either sex or have another adult dependant. You can only apply for this grant for one adult dependant; if you have more than one adult dependant, you can still only receive one grant.

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

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

### Bursaries and scholarships **NOT REPAYABLE**

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 £4,630, can apply to their institution for a bursary.

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 cost 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 the medical insurance, visa costs and vaccinations.

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

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

Contact your local Student Finance (SFNI) office to find out whether 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 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 will be sent more information about the Childcare Grant and further forms to complete about your weekly childcare costs.

You can find out more about the Childcare Grant at [www.studentfinancenico.uk](http://www.studentfinancenico.uk) and about Working Tax Credit at [www.nidirect.gov.uk](http://www.nidirect.gov.uk)

### Disabled Students' Allowance **NOT REPAYABLE**

These can help pay for extra course-related costs you may have as a result of your disability or specific learning difficulty. This includes special equipment, a non-medical helper or special travel arrangements. If you want to apply for DSA only, you should complete an 'Application for Disabled Students' Allowance'

(DSA1) form instead of this form. You can download a DSA1 application form at [www.studentfinancenico.uk](http://www.studentfinancenico.uk)

Alternatively, you can complete sections 1-4 of the PN1 form and return it to us. We will then send you another form that asks more specific questions about your disability/specific learning difficulty.

**e** 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.

**e** If you are taking your course by distance learning or otherwise undertaking but not attending a course in person for a reason which relates to your disability you 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.

## Section 1 - finance available continued

### Further information

You can find more information in the following guides available at [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)

- '2022/23 A guide to Financial Support for Full Time Students in Higher Education'
- '2022/23 Terms and Conditions - Student Loans - A guide to terms and conditions'
- '2022/23 How you are paid - Full Time Higher Education Student Finance - A guide to Entitlement to Support and Payment'
- '2022/23 DSA students - Bridging the gap: A guide to the Disabled Students' Allowance (DSA) in Higher Education'
- '2022/23 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](mailto:brailleandlargefonts@slc.co.uk); or
- telephone us on **0141 243 3686**

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

## Section 2 - personal details

### Personal details

- a** If you have been granted 'Leave to Remain' as a Stateless Person, you can answer 'None' or 'Stateless' in the Nationality box.
- b1** If your UK/ROI passport has expired you'll need to send other documents to prove your identity.
- b2** You need to provide your valid UK passport details on the form or send us your **original** valid ROI passport.
- e** 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.

- b4** If you don't have a valid UK/ROI passport you must send:

- e**
- 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 form at [www.studentfinancenir.co.uk](http://www.studentfinancenir.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 PN1 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 use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.

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

### Previous loans

- c** If you are behind with repayments on a previous loan, you should not apply for student finance until you have resolved this issue.
- If you have any Mortgage Style (MS) Loans please call your debt owner on the telephone number shown on the most recent correspondence that you have received from them. If you do not know who your debt owner is please call **0300 100 0632** for advice.
- If you have any Income Contingent Repayment (ICR) loans, please call **0300 100 0611** for advice.

### Armed Forces

- d1 & 2** You may be eligible for support to study a distance learning course outside 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 Royal Air Force
- The Royal Military Police
- The Army
- 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 2 - personal details continued

### **If you're 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. It must also confirm the country you're currently based in.

**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
- it must also confirm the country you're currently based in
- 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.

### **Contact details**

- e** If your contact address is different, please also provide this. If you provide a contact address, all correspondence we issue will be sent to that address. If your address changes you need to tell us as soon as possible.

### **Current relationship status**

- f** 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 the application.

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

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

## Section 3 - residence

### a1 UK national



If you answer 'Yes' to this question, you must provide your UK passport details on the form, or send your birth certificate as evidence of your nationality. If you were born outside the UK and have a British birth certificate issued by a British Consulate, send this instead of your passport, a letter or other document.

If you have provided your UK passport details in section 2, you do not need to send any further evidence of your UK nationality.

#### 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.

We can accept certified photocopies of your residency evidence, stamped with your unit stamp. You should use your BFPO address for all correspondence.

### a2 Irish citizen



If you answer 'Yes' to this question, you must send your **original** ROI or EU passport.

If you hold a UK passport, you should provide your passport details in section 2 as you do not need to send further evidence of your nationality.

### a3 Family member of a UK national

By family member, you must be the:

- husband, wife, civil partner;
- direct descendant of a UK national.

A direct descendant is defined as the biological child, grandchild, great-grandchild and so on, of a person. For example, you are a direct descendant of your mother, your grandmother, your great-grandmother, and so on.



If you answer 'Yes' to this question, you must provide evidence to show you are the family member of a UK national by sending their passport.

You must also send proof of your relationship to the UK national. This may be:

- your marriage or civil partnership certificate; **or**
- a birth certificate showing your name and the UK national's name; **and**
- the marriage or civil partnership certificate if you or the UK national are a step-child.

If you are claiming student finance as the direct descendant of a UK national, the term means a person 'under the age of 21; or dependants of the person or the person's spouse or civil partner.'

### a4 Settled or pre-settled status under the EU Settlement Scheme



If you answer 'Yes' to this question, you must provide evidence to show you are an EU national, by sending us your **original** EU passport or national identity card.

To prove your immigration status, you need to provide us with confirmation of your EU Settlement Status award from the Home Office, and a share code. Go to

**[www.gov.uk/view-prove-immigration-status](https://www.gov.uk/view-prove-immigration-status)** to generate the code. Once generated, the code will expire after 30 days. You should return your application form as soon as you generate your share code so we can check your status within the 30 days.


When giving your share code, we will check the details with the Home Office and confirm the information you have provided.



## Section 3 - residence continued

### a5 Child of a Swiss national

Your parent or step-parent must have been granted settled or pre-settled status through the EU Settlement Scheme. You must have settled or pre-settled status and be ordinarily resident in the UK, Gibraltar, EEA or Switzerland for three years prior to the first day of your first academic year.

 If you answer 'Yes' to this question, you must provide evidence to show that you are the child of a Swiss national by sending us your **parent's original** passport or national identity card. You must also send us **your** birth certificate or equivalent.

To get student finance as the child of a Swiss national, your Swiss national parent must be resident in the UK on the first day of the academic year. We need a signed letter from your Swiss national parent stating their UK address, and that they live there on the first day of the academic year. They must also send **one** of the following documents:

- Bank statement
- Payslip
- Tenancy agreement/mortgage statement
- Utility bill
- Local authority correspondence
- Government department correspondence

To prove your immigration status, you need to provide us with confirmation of your EU Settlement Status award from the Home Office, and a share code. To prove your parent or step-parent's immigration status, you need to provide us with their date of birth and share code. Go to **www.gov.uk/view-prove-immigration-status** to generate the codes. Once generated, the codes will expire after 30 days. You should return your application form as soon as you generate your share code so we can check your status within the 30 days.

When giving your share codes, we will check the details with the Home Office and confirm the information you have provided.

### a6 EEA or Swiss worker

To get student finance as the family member of an EEA or Swiss national who is working, has worked or is looking for work in the UK, you and your family member must have been granted settled or pre-settled status through the EU Settlement Scheme.


My family member is my:

- husband, wife, civil partner;
- parent(s), step-parent;
- child or step-child;
- other direct ascending or descending line family member (only applicable to EEA worker family members).

A direct descendant is defined as the biological child, grandchild, great-grandchild and so on, of a person. For example, you are a direct descendant of your mother, your grandmother, your great-grandmother, and so on.

A direct relative in the ascending line is defined as the biological parent, grandparent, great-grandparent and so on, of a person. You are a direct relative in the ascending line of your child, grandchild, great-grandchild, and so on.

Other family relationships are excluded from the definitions above.

 The EEA or Swiss national must provide proof of their nationality with their **original** passport or national identity card. You must also send us your birth certificate or equivalent.

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

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

### a6 continued

## Section 3 - residence continued

If you are the parent or other direct ascending line relative of 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 a dependant 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.

To prove your immigration status, you need to provide us with confirmation of your EU Settlement Status award from the Home Office, and a share code. To prove your family member's immigration status, you need to provide us with their date of birth and share code. Go to [www.gov.uk/view-prove-immigration-status](https://www.gov.uk/view-prove-immigration-status) to generate the codes. Once generated, the codes will expire after 30 days. You should return your application form as soon as you generate your share code so we can check your status within the 30 days.

When giving your share codes, we will check the details with the Home Office and confirm the information you have provided.

You do not need to provide a share code if:

- you are an Irish citizen; **or**
- you or your family member is a frontier worker.

### a7 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. You must be ordinarily resident in the UK, Gibraltar, EEA, Switzerland or Turkey for three years prior to the first day of your first academic year.



Please send the **original** Home Office letter and your Biometric Residence Permit.

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

You must provide evidence to show that you are the child of a Turkish worker by sending us your **parent's original** passport or national identity card. You must also send us **your** birth certificate or equivalent.

As proof of your parent's employment in the UK, you must send their contract of employment.

## Section 3 - residence continued

### a8 **Afghan Relocations and Assistance Policy (ARAP) or the Afghan Citizens Resettlement Scheme (ACRS)**

 If you or your:

- husband, wife, civil partner;
- parent or step-parent

have been granted leave under the Afghan Relocations and Assistance Policy (ARAP) or the Afghan Citizens Resettlement Scheme (ACRS), you will have received a letter from the Home Office confirming this.

We need one of the following as proof of identity:

- Original valid Home Office travel document; or
- Original Biometric Residency Permit; or
- Original valid passport.

and one of the following as proof of residency status:

- Original Home Office travel document; or
- Original Biometric Residency Permit; or
- Original Immigration Status Document; or
- Original Home Office letter confirming the category of leave and the date this was granted.

#### **Afghan Locally Employed Staff Ex-Gratia Scheme**

This scheme is for previous employees of the UK government who resigned or were made redundant from their post. Afghan nationals relocated to the UK under this scheme are not eligible for student funding.


### a9 **'Settled status'**

'Settled status' that was not granted under the EU Settlement Scheme means that you can live in the UK permanently without the Home Office placing any restrictions on how long you may remain.

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

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

Further information about immigration issues can be obtained from the Home Office at [www.homeoffice.gov.uk](http://www.homeoffice.gov.uk)


 If you do not have a British passport or Biometric Residence Permit which confirms your immigration status, but you have a letter from the Home Office which does, please send this letter with your application form.

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

### a10 **Limited leave to enter or remain under a Ukraine Scheme**

You need to prove your current status, send us one of the following:

- your valid Biometric Residence Permit; or
- your valid passport with a vignette; or
- your permission to travel document.

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

**All evidence items you send must be originals.**


## Section 3 - residence continued

### a11 Refugee status

If you or your:

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

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

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

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

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).

### a12 Discretionary Leave to Remain


**&13** If you or your:

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

have Discretionary Leave to Remain in the UK:

- as a result of a failed application for asylum; or
- where no application for asylum has been made

the Home Office will have sent you or them a letter and an immigration status document confirming this.

 Please send the **original** Home Office letter and immigration status document, normally a passport or Biometric Residence Permit of the person who holds Discretionary Leave to Remain. You should also send evidence of your relationship to the person who holds this status if it is not you.

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

If you are claiming student finance as the child or step-child of someone who has been granted this status, 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 this status, you must have been their husband, wife or civil partner at the time of their application.

#### Expiry date

If you or your:

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

were granted Discretionary Leave to Remain without an expiry date, you should mark the expiry date box as N/A (not applicable).


## Section 3 - residence continued

### a14 Humanitarian Protection

If you or your:

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

have been granted Humanitarian Protection, you, or they, will have received a letter and an immigration status document from the UK Home Office confirming this.

 Please send the **original** Home Office letter and an Immigration Status Document, normally a passport or Biometric Residence Permit, of the person who has been granted Humanitarian Protection. You should also send evidence of your relationship to the person who has been granted Humanitarian Protection status if it is not you.

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

If you are claiming student finance as the child or step-child of a person granted Humanitarian Protection, 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 Humanitarian Protection, you must have been their husband, wife or civil partner at the time of their application for asylum.

### a15 Stateless Person

If you or your:

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

have been granted 'Leave to 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.

 Please send the **original** Home Office letter and Biometric Residence Permit of the person who has been granted 'Leave to Remain' as a Stateless Person. You should also send 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 and residency status, no other data from it will be used or stored.


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

## Section 3 - residence continued


### a16 Victim of domestic violence or abuse

If you have been granted 'Indefinite Leave to Remain' in the UK as a victim of domestic violence or abuse, you will have received a letter from the Home Office confirming this.

-  Please send the **original** Home Office letter and your Biometric Residence Permit. We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.

### a17 Section 67 of the Immigration Act 2016

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


-  Please send the **original** Home Office letter and Biometric Residence Permit of the person who has been granted 'leave to enter or remain' under section 67 of the Immigration Act 2016. You should also send evidence of your relationship to the person if you are the dependant 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 and residency status, no other data from it will be used or stored.

If you are claiming student finance as the dependent child or step-child of a person granted 'Leave to Remain' in the UK under section 67 of the Immigration Act 2016, 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.

### a18 Calais leave

If you have been granted Calais leave in the UK, or are the dependent child of someone who has, you, or they, will have received an immigration status document from the UK Home Office confirming this.


-  Please send the **original** Home Office letter Biometric Residence Permit of the person who has been granted Calais leave. You should also send evidence of your relationship to the person who has been granted Calais leave if it is not you.

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

If you are claiming student finance as the dependent child or step-child of a person granted Calais leave, 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.

### a19 Bereaved partner

If you have been granted 'Indefinite Leave to Remain' in the UK as a bereaved partner, you will have received a letter from the Home Office confirming this.

-  Please send the **original** Home Office letter and your Biometric Residence Permit. We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.




## Section 3 - residence continued

### a20 Long residency

**&21** To be eligible for support under the long residence category you must have lawful ordinary residence in the UK and Islands for the three-year period before the first day of the first academic year of your course and must be resident in Northern Ireland. This means you must have held a form of Leave to Remain issued by the Home Office for the whole of the three-year period before the first day of the first academic year of your course.

If you are under 18 on the first day of the first academic year of your course, you must also have lived in the UK for at least seven years.

If you are 18 or above on the first day of the first academic year of your course, you must also have lived in the UK for at least half of your life or 20 years.

 As evidence of your date of entry into the UK, please send your **original** Home Office letter confirming the category of your leave, and the date this was granted, and your Biometric Residency Permit. You should also send any of the following:

- School letter and records on headed paper, signed by the Deputy Head or Head Teacher within the school. The letter and records should confirm dates you were in attendance at the school.
- Letter from a GP.
- Confirmation of university/college attendance.
- Rates bill.
- Payslips/P60/P45/self-assessed tax return.
- Confirmation of employment from your employer. This should be on company headed paper and signed by a senior member of staff with contact details provided.



If you have answered 'No' to all questions in this section, you are not eligible for student finance from Student Finance NI. You may still be able to get Tuition Fee only funding. For more information on Tuition Fee Only funding go to [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)

### b3 Residency status

If you have been granted:

- **'Indefinite Leave to Remain'** as the victim of domestic violence or abuse; or
- **'Indefinite Leave to Remain'** as a person who has been a bereaved partner

only provide address history from when you received the status. You only need to provide up to a maximum of 3 years information.

Date study begins between	Date academic year begins
1 August until 31 December inclusive	1 September
1 January until 31 March inclusive	1 January
1 April until 30 June inclusive	1 April
1 July until 31 July inclusive	1 July

## Section 4 - about your course and your university or college

### Course details

- b1** If the new course details you give us can't be confirmed yet, your student funding may be delayed. You can update your university/college and course once your place is confirmed.
- b2** If you are studying for an accelerated degree in England you may be able to apply for funding of up to £11,100.

### Full-time undergraduate course

- c** For these courses you will attend university or college on most days of the week and for most weeks of the year (apart from weekends and the usual holidays). You must attend the course for at least 24 weeks in the academic year, unless it is the last academic year of the course, in which case you must attend for at least 8 weeks. The course must also last for at least one academic year.

### Flexible postgraduate ITT course

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

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

Period of full-time study during the academic year	Less than 10 weeks	<b>Studying in Northern Ireland</b> Tuition Fee Loan of up to £2,300
		<b>Studying in England, Wales or Scotland</b> Tuition Fee Loan of up to £4,625
	10 or more weeks	<b>Studying in Northern Ireland</b> Tuition Fee Loan of up to £4,630
		<b>Studying in England, Wales or Scotland</b> Tuition Fee Loan of up to £9,250

Period of combined full-time study and full-time teaching practice during the academic year	Length of course	
	Less than 1 academic year	1 or more academic years
Less than 6 weeks	No maintenance support	Reduced Maintenance Loan
6 to less than 10 weeks	No maintenance support	Reduced Maintenance Grant Full Maintenance Loan
10 or more weeks	No maintenance support	Full Maintenance Grant Full Maintenance Loan

- e** **Part-time undergraduate ITT course**  
A part-time undergraduate ITT course is a first degree course. You will need to provide a letter from your university or college confirming the number of weeks you will be attending your course full-time and the number of weeks you will be on full-time teaching practice.

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

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.

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

## Section 4 - about your course and your university or college continued

### **e** Full-time postgraduate ITT course

For these courses you must attend full-time, for either study or teaching practice, for an aggregate of at least 6 weeks in the year. If your periods of full-time study including teaching practice amount to less than 6 weeks, you will not be eligible for Maintenance Grants, but you may be able to receive a Tuition Fee Loan and a reduced rate non-income assessed Maintenance Loan. You will still be considered to be attending your course even if arrangements have been made by your university or college for you to take the course without having to attend.

### **Full-time distance learning in relation to 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. If you're studying on a full-time distance learning course because you or your family member is currently serving in the Armed Forces outside Northern Ireland, you don't have to send evidence of a disability.

### **Full-time foundation degree**

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

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

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

### **Term details**

**e** 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**

**g** If you don't know where your placement will be yet you should let us know as soon as possible.

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 are on a paid placement, or an unpaid placement that is not listed, then you will only be entitled to a reduced rate of Maintenance Loan and no Maintenance Grant.

Support is not available for optional placements.

## Section 5 - previous financial support and other information

### Previous study

If you already have an HND, Foundation Degree or similar level qualification and are progressing on to year 1 of a degree course you may not be eligible for fee and grant support for some or all of that degree course.

- a1** This includes any full-time or part-time undergraduate or postgraduate course you have attended, where a qualification was achieved, whether it was in the UK or overseas. You should include any course that you are currently following even if you have not yet received your results. Examples of undergraduate higher education courses you should tell us about include:
- DipHE, HND Degree and Foundation Degree, and similar courses from outside the UK.
  - Integrated Masters Degrees.
- a3** Tick the relevant box(es) to show all qualifications you have achieved in the UK. If you are unsure of the level of your existing qualification please contact your university or college where you completed the course for advice. If you have achieved a qualification overseas you must send evidence of this qualification.
- a4** A self-funded course is one that was studied at a private university or college and no support of any kind was paid either to you or the university or college to meet tuition fee or maintenance costs for the duration of the course.
- e** If you have compelling personal reasons, such as illness or bereavement, for not achieving a qualification you should send evidence to support this. Each case is carefully considered before a decision is made to award additional funding.
- b1** If you are eligible to apply for a social work bursary from the Social Services Inspectorate you should answer 'No' to this question because this is a separate bursary to those offered by the NHS or the 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 the 5th year of study of a medical or dental course will have the DoH bursary entitlement assessed by your local SFNI office using the information provided on the PN1 application.
- 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.
- b2** If you are eligible to apply for a **non-income assessed** bursary - you are **not** eligible for any other student finance. The only exception would be if you are a seconded student studying a health-related course and you have been advised that you cannot apply for any bursary at all, either income or non-income assessed.
- Contact your local SFNI office if you are unsure how to apply for a bursary.

## 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 box blank. You will be contacted if you need to take any action to obtain a National Insurance number.

### Maintenance Loan

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

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

The maximum tuition fee amount you are charged may vary depending on what country you are studying in.

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

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. If you are unsure whether you are attending a relevant institution, check with Student Finance.

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.studentfinancenl.co.uk](http://www.studentfinancenl.co.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.


## Section 7 - dependent and independent students

### 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.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)

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

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

### **b Irreconcilable estrangement**

You will normally 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 student finance guide at [www.standalone.org.uk/guides/student-guide](http://www.standalone.org.uk/guides/student-guide)


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

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

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

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

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

 Please send evidence that you have been supporting yourself financially, such as copies of letters from employers giving dates of employment and pay or similar benefit information.

If you're sending P60s, include evidence to confirm the dates you worked in each financial year.



## Section 8 - student financial details

### Unearned income

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

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

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

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

### Payments from an employer

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

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

### Dependent children

- d** You must 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.

**e**

You must include any income the child received in tax year 2020-21 from working, interest earned on savings, investments and from any maintenance payments you received for your children as part of **their** income in this question.

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 or the student's husband, wife or partner, or the student's parents or step-parents.

**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.

If your child's income will be at least 5% less than it was in tax year 2020-21 you can apply for a current year income assessment. This means we would use their expected income for tax year 2022-23 instead of their actual income for tax year 2020-21 when working out your grant entitlement. If you want to be assessed using expected income for tax year 2022-23 please use the additional notes pages at the back of the form to let us know.

**e**

You must send copies of evidence of your child's income from all sources after tax and National Insurance contributions in tax year 2020-21.

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

**If both you and your partner are students and one of you is studying on a course which is funded by the NHS, and the other is studying a standard course, you can't get Childcare Grant from us as well as childcare support from the NHS.**

- 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 13 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.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)**  
You can get information about all aspects of Working Tax Credit at **[www.nidirect.gov.uk](http://www.nidirect.gov.uk)**
- e4** If your adult dependant's income will be at least 5% less than it was in tax year 2020-21 you can apply for a current year income assessment. This means we would use their expected income for tax year 2022-23 instead of their actual income for tax year 2020-21 when working out your grant entitlement. If you want to be assessed using expected income for tax year 2022-23 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 2020-21. 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.

## Section 10 - about your 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.
- 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 a partner.  
You should tick 'Living with a partner' if your parent has previously been separated, divorced or widowed but is currently living with a partner.  
If full income details are not provided by parent(s) or parent and partner, this could result in an overpayment of support.

- e** If your parents are **divorced** or **separated**, or if they have been in a **civil partnership** which has been **dissolved**, you should send a copy of the decree absolute, decree nisi, dissolution order, a final or conditional order, or a letter from their solicitor confirming their status and date of separation.  
**If your parent is separated or divorced and now living with a partner, their partner must tell us their income details in section 11.**

# 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](http://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.

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;
- the date of the start or end of your course changes; or
- your children are no longer in childcare or your childcare costs change.

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. You should inform your local SFNI office at the same time in order to prevent any overpayments.

You can make changes to your personal details online, log into your account at [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)

## Information about data sharing for bursary and scholarship purposes

Universities and colleges will be offering financial awards such as bursaries or scholarships to their students. To help them administer these awards (i.e. to determine eligibility and entitlement to, and if relevant pay, a bursary or scholarship - 'bursary administration purposes') they will ask the Department for the Economy, your local SFNI office or the 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 11 - financial details for tax year 2020-21 for parents and partners

**If you do not wish to apply for student finance based on household income, your parent(s) or partner do not need to complete this section.**

These notes will help you to complete section 11 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 '2022/23 How you are Paid - Full Time Higher Education Student Finance - A guide to Entitlement to Support and Payment'

### **What happens if my household income has changed since tax year 2020-21?**

If your total household income (before tax) for tax year 2022-23 will be at least 5% less than it was in tax year 2020-21, still complete this section as well as completing a 'Current Year Income Assessment Form'. Be as accurate as possible when submitting figures as any overpayments will be taken off the next year's entitlement.

The Current Year Income Assessment Form will be available to download at [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk) from April 2022.



Please note that a current year income assessment cannot be carried out unless you provide your financial details and evidence for tax year 2020-21.

### **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.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)

## **Part B - Your financial information**

Please give evidence for tax year 2020-21. Normally, this is the year ending 5 April 2021, but may differ if your employer or business has a tax year which does not end in April.

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

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

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

You should refer to your 2020-21 P60 or final payslip for your income from salary/wages. If as part of your salary or wages for tax year 2020-21 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 2020-21 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
- Jobseeker's Allowance
- Statutory Adoption Pay
- Statutory Maternity Pay
- Statutory Paternity Pay
- Statutory Sick Pay
- Widowed Parent's Allowance

## Section 11 - financial details for tax year 2020-21 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 into four 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 2020-21, 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 11 - financial details for tax year 2020-21 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 2020-21. 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 11 - financial details for tax year 2020-21 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 into two 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 2020-21.

- 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 2020-21.

- 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 2020-21:

- 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 2020-21 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 11 - financial details for tax year 2020-21 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 2020-21 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 2020-21 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 11 - financial details for tax year 2020-21 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 2020-21 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 2020-21 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 2020-21 tax year and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

- Amount of omissions (exemptions under transfer of foreign assets)

## Section 11 - financial details for tax year 2020-21 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 2020-21 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	Academic year
1 August 2022 and 31 December 2022 inclusive	1 September 2022 to 31 August 2023
1 January 2023 and 31 March 2023 inclusive	1 January 2023 to 31 December 2023
1 April 2023 and 30 June 2023 inclusive	1 April 2023 to 31 March 2024
1 July 2023 and 31 July 2023 inclusive	1 July 2023 to 30 June 2024

**Q1** The child dependant's income is required to assess eligibility for deductions in the calculation of household income for each child that is wholly or mainly financially dependent on the student, the student's husband, wife or partner or the student's parent(s) or step parent(s). You can find out more information about how household information is calculated at [www.studentfinanceneni.co.uk](http://www.studentfinanceneni.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.

**Q2** If a sibling is listed here and then later does not attend a higher education course, you must inform your local SFNI office immediately as this can impact the amount of support due to the remaining student.

# Declaration for parents and partners

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

## Changes of circumstance

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

The most common change of circumstance would be if:

- your household income changes; or
- your marital status changes or you start/stop living with a partner.

## 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 the Student Loans Company Ltd (SLC) for access to information you provide in connection with any application for student finance for academic year 2022/23 (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](http://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.