

PTL Notes

Tuition Fee Loan, Tuition Fee Grant and Course Grant application notes for new and returning part-time students 2022/23



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.studentfinancenl.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 and residency status, 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



You need to send:

- decree absolute; **or**
- dissolution order; **or**
- a final or conditional order; **or**
- a letter from your solicitor confirming your status; **or**
- original death certificate

Widowed or surviving civil partner

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 - residence

3.1 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 1, 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.

3.2 Irish citizen



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

3.3 Family member of a UK national



By family member, you must be the:

- husband, wife, civil partner; **or**
- direct descendant

of a UK national.

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.

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.

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

- your marriage or civil partnership certificate; **or**
- a long 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 'child' means a person 'under the age of 21; or dependants of the person or the person's spouse or civil partner'.

Section 3 - residence continued

3.4 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 Scheme status from the Home Office with a share code. Go to **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.

3.5 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 pre-settled status and be ordinarily resident in the UK, Gibraltar, the 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 Scheme status from the Home Office with 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.

Section 3 - residence continued

3.6 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 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 (only applicable to EEA worker family members);
- 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.

If your child, son 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 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.

Section 3 - residence continued

3.6 EEA or Swiss worker



To prove your immigration status, you need to provide us with confirmation of your EU Settlement Scheme status from the Home Office with 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 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.

3.7 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, the 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

3.8 Afghan Relocation and Assistance Policy (ARAP) or the Afghan Citizens Resettlement Scheme (ACRS)



If you or your:

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

have been granted leave under the Afghan Relocation 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.

3.9 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; **or**
- you have been granted 'Indefinite Leave to Remain'; **or**
- 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

If you do not have a British passport or Biometric Residency 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 Residency Permit to validate your identity and residency status, no other data from it will be used or stored.

Section 3 - residence continued

3.10 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**.

3.11 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).

Section 3 - residence continued

3.12 & 3.13 Discretionary Leave to Remain



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

3.14 Humanitarian Protection



If you or your:

- husband, wife, civil partner; or
- 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.

Section 3 - residence continued

3.15 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.

3.16 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.

Section 3 - residence continued

3.17 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 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 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.

3.18 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.

3.19 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

3.20 & 3.21 Long residency



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; **or**
- 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 if you are an EU/EEA national or an Irish citizen. For more information on Tuition Fee only funding go to www.studentfinancenir.co.uk

Section 3 - residence continued

3.23 Residency status



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

3.24 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; or
- Leave under the Afghan Relocation and Assistance Policy (ARAP) or the Afghan Citizens Resettlement Scheme (ACRS); or
- Limited leave to remain under a Ukraine scheme.

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

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 2022/23' 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



Do not complete this form if you are studying full-time and are attending your university or college regularly instead of studying by distance learning.

You should complete this form if you are studying by distance learning including a full-time distance learning course.

Do not complete this form if you are studying a full-time distance learning course because you have a disability that prevents you from attending; contact our Customer Support Office on **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; or
- 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.studentfinanceni.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 2021-22, normally this will be the year ending 5 April 2022, 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 2021-22 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 2021-22;
 - payslips for month 12 or week 53 showing 'Total paid to date' for earnings in the period 6 April 2021 to 5 April 2022;
 - 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 2021 to 5 April 2022.
- 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 director's 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 2021 to 5 April 2022;
- 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 16);
- 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 2021-22 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.