

Who is this guide for?

Parents or partners who:

- have been asked to supply financial information in support of a student finance application for academic year 2023/24 and;
- completed a paper tax return for tax year 2021-22.

What is this guide for?

This guide will tell you where to find the information you need on your paper tax return to help you complete the 'Financial details for tax year 2021-22 for parents and partners' section of the main application form.

How to use this guide

The income and deduction types are listed below in the same order as the form you're completing. For each income or deduction type we've provided a reference to help you find that amount on your paper tax return.

Part C - Your financial information

if you are completing a PFF2 form this is Section 3

Income Type	Paper tax return reference
Q1a Tips and other payments not shown on P60	SA102 E1 Box 3
Q2 Total income from state retirement pension	Short paper tax return - SA200 Box 4.1 (non-lump sum amount only – if you completed an SA200 you would not have had a lump sum pension payment) Full paper tax return - SA100 TR3 Box 8, SA100 TR3 Box 9
Q3a Total interest from UK banks, building societies, and unit trusts	Short paper tax return - SA200 Box 5.2 Full paper tax return - SA100 TR3 Box 2
Q3b Total income from UK life insurance gains, securities and partnerships	Short paper tax return - If you completed a short paper return you would not have had any income from UK life insurance gains, securities and unit trusts. Full paper tax return - SA101 Ai1 Box 3, SA101 Ai1 Box 4, SA101 Ai1 Box 6, SA101 Ai1 Box 8, SA104S Box 28, SA104F Box 35, SA104F Box 70, SA104F Box 73
Q3c Total income from UK investments and dividends	Short paper tax return - SA200 Box 5.3 Full paper tax return - SA100 TR3 Box 4, SA100 TR3 Box 5, SA101 Ai1 Box 12, SA101 Ai1 Box 13, SA101 Ai2 Box 1
Q3d Income from foreign investments and dividends	Short paper tax return - If you completed a short paper return you would not have had any income from foreign investments and dividends. Full paper tax return - SA100 TR3 Box 6, SA106 Box 4, SA106 F3 Box 6, SA106 F3 Box 11

Part C - Your financial information (continued)

Q4

Income from taxable benefits in kind	P11D reference
<ul style="list-style-type: none"> Assets placed at employee's disposal (cars, property, goods or other assets) 	Section A - Box 13
<ul style="list-style-type: none"> Payments made on behalf of employee 	Section B - Box 15 (Total sum of both boxes)
<ul style="list-style-type: none"> Vouchers and credit cards 	Section C - Box 12
<ul style="list-style-type: none"> Living accommodation 	Section D - Box 14
<ul style="list-style-type: none"> Mileage allowance and passenger payments 	Section E - Box 12
<ul style="list-style-type: none"> Total cash equivalent of all cars/vans made available 	Section F - Box 9 plus Section G - Box 9
<ul style="list-style-type: none"> Total cash equivalent of fuel for all cars/vans made available 	Section F - Box 10 plus Section G - Box 10
<ul style="list-style-type: none"> Cash equivalent of loans after deducting any interest paid by the borrower 	Section H - Box 15
<ul style="list-style-type: none"> Private medical treatment or insurance 	Section I - Box 11
<ul style="list-style-type: none"> Qualifying relocation expenses payments and benefits 	Section J - Box 15
<ul style="list-style-type: none"> Services supplied 	Section K - Box 15
<ul style="list-style-type: none"> Assets placed at employees disposal 	Section L - Box 13
<ul style="list-style-type: none"> Other items (including subscriptions and professional fees) 	Section M - Box 15 (Total sum of all boxes)
<ul style="list-style-type: none"> Expenses payments made to, or on behalf of, the employee 	Section N - Box 16 (Total sum of all boxes)

Part D - Other income

if you are completing a PFF2 form this is Section 4

Q1a **Total adjusted profit from businesses**

Short paper tax return -
SA200 Box 3.9

Full paper tax return -
SA103F (Box 73 plus Box 75) or SA103S (Box 28 plus Box 30) or SA103L (Box 49 minus Box 50)

b **Total adjusted profit from partnerships**

Short paper tax return -
If you completed a short paper return you would not have had any self-employment income from partnerships.

Full paper tax return -
SA104F (Box 16 plus Box 19 plus Box 67 plus Box 74 minus Box 75), SA104S (Box 16 plus Box 19)

Q2 **Income as a Minister of Religion**

Short paper tax return -
If you completed a short paper return you would not have had any income from working as a Minister of religion.

Full paper tax return -
SA102M (Box 4 plus Box 8 plus Box 10 minus Box 26 plus Box 35)

Q3 **Other taxable income or lump sums**

Short paper tax return -
SA200 Box 7.1

Full paper tax return -
SA100 TR3 Box 17, SA101 Ai2 Box 12, SA101 Ai2 Box 3, SA101 Ai2 Box 4, SA101 Ai2 Box 5, SA101 Ai2 Box 9

Q4 **Income from property lettings**

Short paper tax return -
SA200 Box 6.3

Full paper tax return -
SA105 Box 13 and 38, SA106 Box 25

Part D - Other income (continued)

Q5	Income from UK trusts	Short paper tax return - If you completed a short paper return you would not have had any income from UK trusts. Full paper tax return - SA107 Box 1, SA107 Box 2, SA107 Box 3, SA107 Box 4, SA107 Box 5, SA107 total sum of (Boxes 7 to 14), SA107 total sum of (Boxes 16 to 21), SA107 Box 22
Q6	Foreign income	Short paper tax return - If you completed a short paper return you would not have had any foreign income. Full paper tax return - SA106 F3 Box 9, SA106 F3 Box 13, SA106 F6 Box 41, SA106 F6 Box 42, SA106 F6 Box 43
Q7	Income from an overseas pension	Short paper tax return - If you completed a short paper return you would not have had any income from an overseas pension. Full paper tax return - SA101 Ai4 Box 7, SA101 Ai4 Box 13, SA101 Ai4 Box 14, SA101 Ai4 Box 16, SA101 Ai4 Box 17
Q8	Other overseas income and gains	Short paper tax return - If you completed a short paper return you would not have had any income from other overseas income and gains. Full paper tax return - SA106 F6 Box 46

Part E - Income deductions

if you are completing a PFF2 form this is Section 5

Q3	Allowable expenses on which you claimed tax relief	Short paper tax return - SA200 Box 2.5 Full paper tax return - SA100 TR3 Box 18, SA101 Ai2 Box 11, SA101 Ai2 Box 13, SA102 E1 Box 17, SA102 E1 Box 18, SA102 E1 Box 19, SA102 E1 Box 20
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