



# The NHS Bursary Scheme New Rules

**9th edition for the academic year 2020 to 2021**

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# Notes

**Ninth Edition Explanatory Notes:** The Ninth Edition rules are for the **academic year** from 1 September 2020 to 31 August 2021 and are applicable to:

- Medical and Dental students (bursary-eligible study years);
- Continuing **Non-medical students** who started their course on or after 1 September 2012 but before 1 August 2017
- Continuing **Non-medical** postgraduate students who started their course on or after 1 August 2017 but before 1 August 2018
- Continuing students on dental hygiene and dental therapy courses (included in the capped numbers commissioned by **Health Education England**) that started their course on or after 1 August 2017 but before 1 August 2019.

## Disclaimer

Students and prospective students should not rely on the current NHS Bursary rules and allowances when planning for subsequent **academic years**. These rules may be subject to review in the future and as a result may change. Further information about the **NHS Bursary Scheme** will be posted on the [NHS Business Services Authority website](#). Students are advised to check the website on a regular basis. The Department of Health and Social Care and NHSBSA Student Services will not accept responsibility for loss of any type suffered by students who have relied on current rules and allowances whether for the current **academic year**, **academic year** to begin, or indeed for subsequent **academic years**.

# Introduction

(a) In 1968, Parliament gave the Secretary of State for Health and Social Care the power to provide training for people considering employment in the National Health Service (NHS), and to pay allowances to people who have accepted places on these courses. These allowances are known as NHS Bursaries. (A bursary is a traditional name for a financial allowance given to help a student meet the costs of study).

(b) Since then, successive Secretaries of State have developed rules to ensure that NHS Bursaries are paid fairly and consistently. They have also developed administrative arrangements to ensure that they are paid efficiently in line with the rules. These rules and administrative arrangements are known collectively as “The NHS Bursary Scheme”.

(c) Because of the large number of allowances paid under the rules, the Secretary of State has directed the NHS Business Services Authority (NHSBSA) to administer the NHS Bursary Scheme on their behalf<sup>1</sup>. Although the NHS Bursary Scheme is administered by the NHSBSA, the Secretary of State retains overall responsibility for the scheme.

(d) A summary of the changes to the rules for 2020/21 can be found in appendix I.

(e) The NHSBSA can provide further assistance in understanding these rules, including the changes for 2020. A number of other bodies also provide information on careers in the NHS health professions. These bodies are listed in appendix II.

<sup>1</sup> The Secretary of State has done this through the NHS Business Services Authority (Awdurdod Gwasanaethau Busnes y GIG) Directions 2016.

# 1. Section 1. Summary of the Rules

1.1 The following rules describe the circumstances under which the Secretary of State for Health and Social Care will pay allowances under Section 63(6) of the Health Services and Public Health Act 1968 in the 2020/21 academic year to:

- (a) Medical and Dental students (bursary-eligible study years); and
- (b) Continuing Non-medical students who first started their course on or after 1 September 2012, but before 1 August 2017; and
- (c) Continuing Non-medical students on eligible undergraduate part-time capped courses<sup>2</sup> who first started their course on or after 1 August 2017 but before 1 August 2018; and
- (d) Continuing non-medical students occupying a commissioned place on an eligible pre-registration postgraduate healthcare course who first started on or after 1 August 2017 but before 1 August 2018 and to whom the temporary transitional arrangements in 2017/18 applied; and
- (e) Continuing students occupying a capped place on an eligible undergraduate pre-registration dental hygiene and dental therapy course at certain institutions commissioned by Health Education England which started on or after 1 August 2018 but before 1 August 2019. For details of these institutions, see section 2, table 2c.

1.2 Any allowance paid under these rules is referred to as an NHS Bursary, and these rules, together with the administrative arrangements by which the NHS Business Services Authority (NHSBSA) makes such payments on behalf of the Secretary of State for Health and Social Care, are referred to as the NHS Bursary Scheme.

1.3 Words and phrases which have a particular meaning in these rules appear in bold black typeface like these words. The particular meaning of these words or phrases can be found in the glossary in section 14. Where the rules contain words and phrases like this they must be interpreted as having the meaning set out in the glossary.

<sup>2</sup> A maintenance bursary is available for a capped number of continuing eligible English-domiciled students on part-time courses in the 2020/21 academic year. Students will have access to the tuition fee loan funding and any Disabled Students Allowances via the standard student finance system as administered by the Student Loans Company (Student Finance England provisions). They are also eligible to apply for the Exceptional Support Fund element of the Learning Support Fund.

## Application and Changes

1.4 These rules apply to the groups of students referred to in para 1.1 (a) to (e). They apply for the year from 1 September 2020 to 31 August 2021. They contain a number of changes from the Eighth Edition of the NHS Bursary Scheme rules published in 2019. These changes are summarised at appendix I.

## Complaints and Appeals

1.5 Where a student is dissatisfied with the way an NHS Bursary application, bursary payment, or any other matter in relation to an NHS Bursary has been dealt with, the procedure for complaints and appeals is set out in section 13.

## The Principle Rule

1.6 The principle rule is that the NHS Bursary Scheme will provide an NHS Bursary to Medical and Dental students (bursary-eligible study years), and non-medical students on the courses outlined in paragraph 1.1, sub-paragraphs (a) to (e) who meet all the following conditions. These are that the student:

- (a) is a person who is eligible under these rules, and
- (b) is on a course which is eligible under these rules, and
- (c) has applied for a bursary as prescribed by these rules, and
- (d) has not been disqualified from receiving a bursary as a result of misconduct in relation to a previous application or award.

1.7 The students who are eligible under these rules are described in section 2. The courses which are eligible are set out in section 3. The procedure for applying for a bursary is set out in section 12, and the rules relating to disqualification are described in section 10.

1.8 It should be noted that a student's eligibility for an NHS Bursary is determined by the NHSBSA, whereas a student's eligibility to be accepted onto an NHS commissioned course is determined by the academic authority.



## **What an NHS Bursary Provides**

1.9 The NHS Bursary Scheme may provide a contribution towards a medical or dental student's tuition fees as set out in section 4. Where this is the only assistance for which a student is eligible, the bursary is known as a fees only bursary.

1.10 The NHS Bursary Scheme may also provide a maintenance award to assist students with the cost of attending the course. In this case the bursary is known as a full bursary. The rules on eligibility are set out in section 2 and the calculation of the amounts payable is set out in section 5.

1.11 Where a student is eligible for a full bursary, the maintenance award may also include additional allowances, such as Disabled Students Allowances set out in section 6, the reimbursement of costs associated with attending practice placements set out in section 7, and a number of other allowances set out in section 8.

## **Changes in Circumstances**

1.12 Where a student's circumstances change during a course, the rules setting out the consequences for any NHS Bursary are set out in section 9.

## **Conditions Attached to an Award**

1.13 If an NHS Bursary is awarded under these rules, it will be awarded subject to the conditions set out in section 10.

## **Exceptions to the Normal Rules**

1.14 There are a limited number of cases where exceptions to particular rules have been allowed. These exceptions, and the circumstances in which they have been granted, are set out in section 11. Any student whose circumstances are the same as those described in this section is entitled to benefit from the relevant exception.

## **Applying for a Bursary**

1.15 The rules on applying for a bursary are set out in section 12.

## **Glossary**

1.16 Words and phrases in these rules which have a particular meaning are defined in the glossary in section 14.

## **Appendices**

1.17 A summary of the changes in these rules compared to the rules published in 2019 is provided at appendix I. A list of organisations which may be able to provide help and advice is provided at appendix II, and some guidance on maternity, adoption and related awards is provided at appendix III.

1.18 These appendices are provided for information and are not part of the rules themselves.

## **2. Section 2. The People Eligible for an NHS Bursary**

### **Personal eligibility**

2.1 Subject to the provisions detailed in section 1, a student is eligible for an NHS Bursary if the student satisfies all of the following conditions. These are that the student:

- (a) is a pre-registration student of one of the healthcare professions listed in table 2a who has not previously been registered in that healthcare profession; and
- (b) satisfies the general immigration and residence requirements set down by the Secretary of State for Health and Social Care in paragraph 2.2 and table 1; and
- (c) satisfies, in the case of students of medicine or dentistry, the particular requirements at paragraphs 2.6 to 2.8 below; and
- (d) satisfies, in the case of non-medical students, the requirements at paragraph 2.9.
- (e) is not attending the course on secondment; and
- (f) is not in receipt of support in excess of the value of an NHS Bursary by reason of sponsorship or assistance from another scheme (other than the Student loan scheme or the academic authority's own hardship funds) as set out in paragraph 2.10; and
- (g) is not held in custody while on or awaiting trial or serving a prison sentence
- (h) needs to have started their course on the relevant dates outlined in section 1, paragraph 1.1 (a) to (e).

### **Temporary withdrawal**

2.2 Students who applied for a place that started in 2016/17 but deferred course commencement to on or after 1 August 2017, will come under the standard student support system provided by the Student Loans Company (SLC).

2.3 Students who commence an NHS Bursary-eligible course but step off that course on a temporary basis may continue under NHS Bursary provisions when they re-join the course (either with the same or a different cohort) if:

- (a) they remain registered with the academic authority during the period of absence; and

(b) they stepped off the course due to exceptional circumstances, as agreed between the academic authority and the commissioner.

(i) Exceptional circumstances include, but are not limited to, maternity leave or medically certified illness or injury.

(ii) The academic authority in conjunction with the commissioner will be responsible for determining whether it is appropriate for the absence to be classed as exceptional and for NHS funding to continue to be provided through the NHS Bursary Scheme, providing the conditions at paragraphs 2(a) and (b) above are met.

## General Immigration and Residence Requirements

2.4 The general immigration and residence requirements for NHS Bursaries are set out in table 1. There is an immigration status in the first column and a residence requirement in the second column. A student must satisfy both the immigration status and residence requirement in at least one table entry in order to receive a bursary.

2.5 The third column of table 1 sets out the type of bursary to which the student satisfying the associated immigration and residence requirements will be entitled. This can be either a full bursary or a fees only bursary.

### Table 1: Immigration Status and Residence Requirements

Table 1a: Persons who are settled in the UK

Immigration Status	Associated Residence Requirements	Eligibility
<p>a) Settled in the UK, other than by having acquired the right to permanent residence, on the first day of the first academic year of the course.</p> <p>(i) Ordinarily resident in the UK on the first day of the first academic year of the course, and</p>	<p>(ii) has been ordinarily resident in the UK and Islands throughout the three years preceding the first day of the first academic year of the course, and</p> <p>(iii) whose residence in the UK and Islands has not during any part of the period referred to in entry (a) (ii), been wholly or mainly for the</p>	<p>Full bursary Note: UK nationals who have always lived in the UK will qualify under this entry.</p>

Immigration Status	Associated Residence Requirements	Eligibility
	purpose of receiving full-time education, unless they are a person who is treated as ordinarily resident on account of their or their family's temporary absence abroad under the definition of ordinarily resident in the glossary.	
<p>(b) settled in the UK by virtue of having acquired the right of permanent residence.</p> <p>(i) Ordinarily resident in the UK on the first day of the first academic year of the course, and</p>	<p>(ii) has been ordinarily resident in the UK and Islands throughout the three years preceding the first day of the first academic year of the course, and</p> <p>(iii) in a case where the person's ordinary residence in entry (b) (ii) was wholly or mainly for the purpose of receiving full-time education, was ordinarily resident in the territory comprising the EEA and Switzerland immediately before the period of ordinary residence referred to in entry (b) (ii).</p>	Full Bursary

**Table 1b: Refugees and their family members**

Immigration Status	Associated Residence Requirement	Eligibility
(c) A refugee.	<p>(i) Ordinarily resident in the UK and Islands and has not ceased to be so resident since the person was recognised as a refugee, and</p> <p>(ii) Ordinarily resident in the UK on the first day of the first academic year of the course.</p>	Full bursary
(d) The spouse or civil partner of a refugee and was	(i) Ordinarily resident in the UK and Islands and has not	Full bursary

<b>Immigration Status</b>	<b>Associated Residence Requirement</b>	<b>Eligibility</b>
the spouse or civil partner of the refugee on the date on which the refugee made the application for asylum.	<p>ceased to be so resident since being given leave to enter or remain in the UK, and</p> <p>(ii) Ordinarily resident in the UK on the first day of the first academic year of the course.</p>	
(e) The child of a refugee or the child of the spouse or civil partner of a refugee, and on the date on which the refugee made the application for asylum was the child of the refugee or the child of a person who was the spouse or civil partner of the refugee on that date, and was under 18 on the date on which the refugee made the application for asylum	<p>(i) Ordinarily resident in the UK and Islands and has not ceased to be so resident since being given leave to enter or remain in the UK, and</p> <p>(ii) Ordinarily resident in the UK on the first day of the first academic year of the course.</p>	Full bursary

**Table 1c: Persons granted humanitarian protection and their family members**

<b>Immigration Status</b>	<b>Associated Residence Requirement</b>	<b>Eligibility</b>
(f) A person granted humanitarian protection.	<p>(i) Ordinarily resident in the UK on the first day of the first academic year of the course, and</p> <p>(ii) has been ordinarily resident in the UK and Islands throughout the three-year period preceding the first day of the first academic year of the course.</p>	Full bursary
(g) The spouse or civil	(i) Ordinarily resident in the	Full bursary

<b>Immigration Status</b>	<b>Associated Residence Requirement</b>	<b>Eligibility</b>
partner of a person granted humanitarian protection and was the spouse or civil partner of the person granted humanitarian protection on the date on which that person applied for asylum.	UK on the first day of the first academic year of the course, and  (ii) has been ordinarily resident in the UK and Islands throughout the three-year period preceding the first day of the first academic year of the course.	
(h) The child of a person granted humanitarian protection, or the child of the spouse or civil partner of a person granted humanitarian protection, and on the asylum application date was the child of that person or the child of a person who was the spouse or civil partner of the person granted humanitarian protection on that date and was under 18 on the asylum application date.	(i) Ordinarily resident in the UK on the first day of the first academic year of the course, and  (ii) has been ordinarily resident in the UK and Islands throughout the three-year period preceding the first day of the first academic year of the course.	Full bursary

**Table 1d: Workers, employed persons, self-employed persons and their family members**

<b>Immigration Status</b>	<b>Associated Residence Requirement</b>	<b>Eligibility</b>
(i) An EEA migrant worker or an EEA self-employed person, or a family member of such a person.	(i) Ordinarily resident in the UK on the first day of the first academic year of the course, and  (ii) has been ordinarily resident in the territory comprising the EEA or Switzerland throughout the three-year period preceding	Full bursary

Immigration Status	Associated Residence Requirement	Eligibility
	the first day of the first academic year of the course.	
(j) A Swiss employed person or a Swiss self-employed person or a family member of such a person.	(i) Ordinarily resident in the UK on the first day of the first academic year of the course, and  (ii) has been ordinarily resident in the territory comprising the EEA or Switzerland throughout the three-year period preceding the first day of the first academic year of the course.	Full bursary
(k) An EEA frontier worker or an EEA frontier self-employed person, or a family member of such a person.	Has been ordinarily resident in the territory comprising the EEA or Switzerland throughout the three-year period preceding the first day of the first academic year of the course.	Full bursary
(l) A Swiss frontier employed person or a Swiss frontier self-employed person, or a family member of such a person.	Has been ordinarily resident in the territory comprising the EEA or Switzerland throughout the three-year period preceding the first day of the first academic year of the course.	Full bursary
(m) a person entitled to support by virtue of Article 10 of Regulation 492/11 on Free Movement of Workers as extended by the EEA agreement.	(i) Ordinarily resident in the UK on the first day of the first academic year of the course, and  (ii) has been ordinarily resident in the territory comprising the EEA and Switzerland throughout the three-year period preceding	Full bursary



Immigration Status	Associated Residence Requirement	Eligibility
	the first day of the first academic year of the course.	

**Table 1e: Persons who are settled in the UK and have exercised a right of residence elsewhere**

Immigration Status	Associated Residence Requirement	Eligibility
(n) Settled in the UK and has exercised a right of residence elsewhere.	<p>(i) Ordinarily resident in the UK and settled in the UK immediately before leaving the UK, and</p> <p>(ii) Ordinarily resident in the UK on the first day of the first academic year of the course, and</p> <p>(iii) Ordinarily resident in the territory comprising the EEA and Switzerland throughout the three-year period preceding the first day of the first academic year of the course, and</p> <p>(iv) in a case where the person's Ordinary residence referred to in entry (n) (iii) was wholly or mainly for the purpose of receiving full-time education, ordinarily resident in the territory comprising the EEA and Switzerland immediately before the period of ordinary residence</p>	Full bursary

Immigration Status	Associated Residence Requirement	Eligibility
	referred to in entry (n) (iii).	

**Table 1f: EU nationals**

Immigration Status	Associated Residence Requirement	Eligibility
<p>(o) An EU national on the first day of the first academic year of the course, or a family member of such a person.</p>	<p>(i) Ordinarily resident in the territory comprising the EEA or Switzerland throughout the three-year period preceding the first day of the first academic year of the course, and</p> <p>(ii) whose ordinary residence in the territory comprising the EEA or Switzerland has not, during any part of the period referred to in entry (o) (i) been wholly or mainly for the purpose of receiving full-time education, unless they are a person who is treated as ordinarily resident on account of their or their family's temporary absence abroad under the definition of ordinarily resident in the glossary.</p>	<p>Fees only bursary</p>
	<p>(i) Ordinarily resident in the UK on the first day of the first academic year of the course, and</p>	<p>Full bursary</p>

**Table 1g: Children of Swiss Nationals**

<b>Immigration Status</b>	<b>Associated Residence Requirement</b>	<b>Eligibility</b>
(q) A Child of a Swiss national exercising their free movement rights in the UK <sup>3</sup> is entitled to support in the UK by article 3(6) of annex 1 of the Swiss agreement.	<p>(i) Ordinarily resident in the UK on the first day of the first academic year of the course, and</p> <p>(ii) ordinarily resident in the territory comprising the EEA or Switzerland throughout the three-year period preceding the first day of the first academic year of the course, and</p> <p>(iii) in a case where the persons ordinary residence referred to in entry (q) (ii) was wholly or mainly for the purpose of receiving full-time education, was ordinarily resident in the territory comprising the EEA and Switzerland immediately prior to the period of ordinary residence referred to in entry (q) (ii).</p>	Full bursary

<sup>3</sup> Applicable to students who started their course from 2013/14

**Table 1h: Children of Turkish workers**

<b>Immigration Status</b>	<b>Associated Residence Requirement</b>	<b>Eligibility</b>
(r) The Child of a Turkish worker.	<p>(i) Ordinarily resident in the UK on the first day of the first academic year of the course, and</p> <p>(ii) has been ordinarily</p>	Full bursary

Immigration Status	Associated Residence Requirement	Eligibility
	resident in the territory comprising the EEA, Switzerland and Turkey throughout the three-year period preceding the first day of the first academic year of the course.	

**Table 1i: Persons with leave to remain**

Immigration Status	Associated Residence Requirement	Eligibility
(s) Persons with Long Residence in the UK <sup>4</sup>	<p>A person who on the first day of the first academic year of the course is either:</p> <p>(i) under the age of 18 and has lived in the UK throughout the seven-year period preceding the first day of the first academic year of the course; or (ii) aged 18 years old or above and, preceding the first day of the first academic year of the course, has lived in the UK throughout either</p> <ul style="list-style-type: none"> <li>• half their life or</li> <li>• a period of twenty years<sup>5</sup></li> </ul> <p>(iii) is ordinarily resident in the UK, and</p> <p>(iv) has been ordinarily resident in the UK and Islands throughout the three-</p>	Full bursary

Immigration Status	Associated Residence Requirement	Eligibility
	<p>year period immediately preceding the first day of the first academic year of the course, and (v) whose residence in the UK and Islands has not during any part of the period referred to in entry (s) (iv), been wholly or mainly for the purpose of receiving full-time education.</p>	

4 Applicable to students from September 2016/17 onwards

5 The minimum residency period is capped at twenty years for those aged 40 and over.

**Table 1j: Persons granted stateless leave and their family members**

Immigration Status	Associated Residence Requirement	Eligibility
(t) A person granted stateless leave <sup>6</sup>	<p>(i) ordinarily resident in the UK on the first day of the first academic year of the course; and</p> <p>(ii) has been ordinarily resident in the United Kingdom and Islands throughout the three-year period preceding the first day of the first academic year of the course.</p>	Full bursary
(u) The spouse or civil partner of a person granted stateless leave who on the leave application date was the spouse or civil partner of	(i) ordinarily resident in the UK on the first day of the first academic year of the course; and	Full bursary

Immigration Status	Associated Residence Requirement	Eligibility
that person	(ii) ordinarily resident in the United Kingdom and Islands throughout the three-year period preceding the first day of the first academic year of the course.	
(v) The child of a person granted stateless leave, or the child of the spouse or civil partner of a person granted stateless leave, who on the leave application date was the spouse or civil partner of the person and who was under 18 on that date.	(i) ordinarily resident in the United Kingdom on the first day of the first academic year of the course; and(ii) ordinarily resident in the United Kingdom and Islands throughout the three-year period preceding the first day of the first academic year of the course.	Full bursary

6 Applies to new students commencing a course from 1 August 2018 onwards

## Additional requirements for Medical and Dental Students

2.6 Each UK country is responsible for its own medical and dental students, wherever they study in the UK. Because of this and in addition to the general immigration and residence requirements set out at paragraph 2.4 and 2.5 and in table 1, the NHS Bursary Scheme will only provide bursaries for medical and dental students who are either:

- (a) Ordinarily resident in England on the first day of the first academic year of their course; and whose residence in England is not wholly or mainly for the purpose of receiving full-time education or
- (b) Are not ordinarily resident in the UK or Islands but qualify for an NHS Bursary under the provisions in entries (k), (l) Table 1d, or (o) in table 1f.

2.7 Medical and dental students must also be occupying a place on a medical or dental course which is counted within the Office for Students (OfS) medical and dental student intake target.

## **Additional requirements for students on eligible part-time courses**

2.8 Students on eligible part-time courses which started on or after 1 September 2017 and prior to 1 September 2018 must have been ordinarily resident in England on the first day of their academic year, rather than the wider UK.

2.9 EU nationals other than UK nationals may be eligible for a bursary maintenance award if, on the first day of the first academic year of the course, they meet the required eligibility criteria, in accordance with the Education (Student Support) Regulations 2011.

2.10 Part-time students who are therefore:

- (i) eligible for a maintenance bursary; and
- (ii) allocated one of the capped places, will continue to receive a maintenance bursary in the 2020/21 academic year and for the duration of that course.

2.11 For the purposes of paragraphs 2.6 and 2.8, a person who is ordinarily resident in England, Wales, Scotland, Northern Ireland or the Islands, as a result of having moved from another of those areas for the purpose of undertaking:

- (a) the current course; or
- (b) a course which, disregarding any intervening vacation, the person undertook immediately before undertaking the current course, is to be considered as ordinarily resident in the place from which the person moved.

## **Additional requirements for non-medical students**

2.12 In addition to the general immigration and residence requirements set out at paragraphs 2.4 and 2.5 and table 1, the NHS Bursary Scheme will only provide bursaries for non-medical students if Health Education England (HEE), the commissioner, holding the contract and providing the funding for the non-medical course has agreed with the institution providing the course that the student can take up the place on the HEE-funded place on that course.

## **Students with assistance from employers or other schemes**

2.13 A student who is sponsored, or in receipt of any scholarship, exhibition, bursary or award of similar description (other than from the Student Loan Scheme or the academic authority's own hardship funds), is not eligible for an NHS Bursary<sup>7</sup> if their income after tax

from any sponsorships or awards in the academic year exceeds the maximum bursary, including any contribution towards tuition fees, that would have been payable had the student not been in receipt of the award.



## 3. Section 3. The Courses Eligible for an NHS Bursary

### Course eligibility

3.1 Subject to the provisions detailed in section 1, a course is eligible for an NHS Bursary if it satisfies all the following conditions. These are that:

- (a) it is provided by a Recognised Institute of Higher Education in England or, for courses leading to professional registration as a doctor or dentist, in the UK; and
- (b) it leads to a professional registration in one of the healthcare professions listed in tables 2(a), (b) and (c) below; and
- (c) it is either provided under a contract with and funded by Health Education England or it is a course leading to professional registration as a doctor or dentist; and
- (d) if it is a course leading to professional registration as a doctor or dentist, it is a part of the course which is eligible for a bursary as set out in paragraph 3.2 and table 3.
- (e) The minimum level of qualification required for a course to be eligible is a Diploma of Higher Education Level

Table 2a: Eligible Healthcare professions—courses which started on or after 1 September 2012 and before 1 August 2018:

<b>Eligible Healthcare professions</b>
Chiropodist or Podiatrist
Dental Hygienist/Dental Therapist
Dentist
Dietician
Doctor
Nurse (including students studying joint nursing/social work programmes)
Midwife
Occupational Therapist
Operating Department Practitioner

Orthotist/Prosthetist
Orthoptist
Physiotherapist
Radiographer
Radiotherapist
Speech and Language Therapist

Table 2b: Eligible Healthcare professions – students on courses which started on or after 1 August 2017 but before 1 August 2018<sup>8</sup>:

<b>Eligible Healthcare professions</b>
Eligible undergraduate part-time capped Nursing, Midwifery and Allied Health Professional courses
Eligible pre-registration postgraduate healthcare students
Eligible pre-registration dental hygiene and dental therapy students

Table 2c: Eligible Healthcare professions – students on courses which started on or after 1 August 2018 and before 1 August 2019.

Pre-registration dental hygiene and dental therapy students occupying a capped place on a course commissioned by Health Education England at the following institutions:
The UCL Eastman Dental Institute
Kings College London
The Greater Manchester School for Dental Care Professionals
The University of Birmingham – in partnership with Birmingham Community Healthcare NHS
Bristol Dental School
The UCL Eastman Dental Institute

8 i.e. courses which fell under the 2017/18 Transitional Arrangements for NHS Bursary funding

## The parts of a Medical or Dental Course eligible for an NHS Bursary

3.2 Only the later years of courses leading to professional registration as a doctor or dentist are eligible for an NHS Bursary. These years are set out in table 3, subject to the qualification concerning repeat years set out in paragraph 3.3.

Table 3: Eligible parts of Medical and Dental courses

### Part of Course Eligible for an NHS Bursary

Type of Medical or Dental Pre-registration Course	Year One	Year Two	Year Three	Year Four	Year Five	Years Six or more
Five or more years pre- registration course (including any integral foundation or intercalating years at bachelor or master’s degree level).	Not Eligible	Not Eligible	Not Eligible	Not Eligible	NHS Bursary	NHS Bursary
Accelerated pre- registration course for graduates with relevant prior learning	Not Eligible	NHS Bursary	NHS Bursary	NHS Bursary		
Accelerated pre- registration course for graduates with relevant prior learning	Not Eligible	NHS Bursary	NHS Bursary			

3.3 A year of study required to be undertaken as a repeat of a year which was not itself eligible for a bursary, is not eligible for a bursary. A year of study required to be undertaken

as a repeat of a year which would have been eligible for a bursary, may be eligible for a bursary under the rules in section 9.

## **Part time, accelerated, postgraduate and international courses**

3.4 For the avoidance of doubt, eligible courses can be part-time or full-time and include:

- (a) Accelerated courses aimed at graduates from other disciplines.
- (b) Pre-registration courses at masters, graduate diploma or postgraduate diploma level.
- (c) International courses (sometimes undertaken as a study-abroad option for part of a course).

## 4. Section 4. Tuition Fee Contributions

4.1 Most courses eligible for an NHS Bursary, other than those leading to professional registration as a doctor or dentist, are funded directly by the NHS. For this reason, the majority of students on courses eligible for an NHS Bursary do not have to pay tuition fees.

4.2 Tuition fees are payable on courses leading to professional registration as a doctor or dentist. In these cases, the NHS Bursary Scheme will pay a contribution towards tuition fees, but only for the later years of the course which are eligible for an NHS Bursary as set out in section 3 and table 3, and only if the student is attending the course on 1 December of the year for which a fee is payable.

4.3 The maximum amount of help the medical or dental student will get towards their tuition fees for each is set out in table 4. If a student's tuition fees are less than this, the tuition fee contribution will be limited to the student's actual fees. If the student's tuition fees are higher the student will have to pay the balance, although the student may be able to apply for a loan from the Student Loans Company to cover the additional cost.

**Table 4 Maximum Annual Tuition Fee Contribution**

**Courses starting on or after 1 September 2012**

<b>Year and Type of Course</b>	<b>Maximum Annual Tuition Fee Contribution</b>
Any eligible academic year on a pre- registration course lasting 5 or more years (including any integral foundation or intercalating years at bachelor or master's degree level).	£9,250
Any eligible academic year on an accelerated pre-registration course for graduates.	£3,715 (£3,925 in Northern Ireland)
Any eligible academic year of an international course where the periods of study at the institution in the UK are no more than 10 weeks full-time or 30 weeks part-time (excluding holidays).	£4,625
Any final year of a course this is ordinarily required to be completed after less than 15 weeks attendance.	£4,625

## **How the Tuition Fee Contribution is Paid**

4.4 The tuition fee contribution is paid annually on behalf of the student, directly to the academic authority providing the course, provided the student is attending the course on 1 December of the year for which the fees are payable.

## 5. Section 5. Maintenance awards

5.1 All students who are eligible for an NHS Bursary, other than EU nationals who qualify for a fees only bursary under entry (o) of table 1f, are eligible for a full bursary including a maintenance award.

### Calculation of the Maintenance award

5.2 The amount of maintenance award payable is assessed for each academic year. The calculation for eligible students as set out in section 2, tables 2(a) to (c), is set out in table 5, subject to an adjustment for part-time courses set out in paragraph 5.3.

**Table 5: Maintenance award calculation**

Non-Means-Tested Allowances:	Means-Tested Allowances:
(a) A non-means tested grant as set out in table 6, plus	(d) The means tested bursary as set out in table 6, plus
(b) Any disabled students allowance as set out in section 6, plus	(e) Any extra weeks allowance as set out in paragraph 5.4, plus
(c) The reimbursement of practice placement expenses as set out in section 7.	(f) Any dependants allowance or parent learning allowance payable under paragraphs 8.2 to 8.7, plus
	(g) Any childcare allowance payable under paragraphs 8.8 to 8.11, minus
	(i) Any deduction on account of the student's, parent's, spouse's, civil partner's or partner's income as set out in paragraphs 5.6 to 5.17.

### Adjustment for part-time courses<sup>1</sup>

5.3 Where the course is a part-time course the disabled students allowances payable under the rules in section 6, practice placement expenses payable under section 7, and any

childcare allowances payable under paragraphs 8.8 to 8.11, will be the same as for a full-time course. Other elements of the maintenance award in each academic year will be a proportion of the amount payable for full-time courses determined as follows:

- (a) for courses which are normally three years full-time:
  - (i) For a four-year part-time course 75%;
  - (ii) For a five-year part-time course 60%;
  - (iii) For a six-year part-time course 50%.
- (b) For all other courses the appropriate proportion of the full-time rate taking into account the relative length of the part-time course and the equivalent full-time course.

**Table 6: Basic Allowance**

<b>Place where the student is studying and living</b>	<b>Non-Means Tested Grant – Academic Year</b>	<b>Means Tested Bursary – basic year rate</b>
(a) Studying in London and living away from the parental home during the course.	£1,000	£3,191
(b) Studying outside London and living away from the parental home during the course.	£1,000	£2,643
(c) Living at the parental home during the course.	£1,000	£2,207

<sup>1</sup> Applies to students who started their course on or after 1 September 2012 but before 1 August 2017 and also to continuing students on part time courses who fell under the 2017/18 Transitional Arrangements.



## Extra Weeks Allowance for more intensive courses

5.4 If a student’s course runs during the academic year for a period of more than 30 weeks and 3 days excluding holidays, the student’s extra weeks allowance is determined as follows:

(a) Where the student’s course runs during the academic year for a period of less than 45 eligible weeks excluding holidays, the extra weeks allowance is the amount set out in table 7 multiplied by the number of additional eligible weeks of attendance over 30 weeks and 3 days, rounding up to the nearest whole week, or,

(b) Where the student’s course runs during the academic year for a period of 45 or more eligible weeks excluding holidays, the extra weeks allowance is the amount set out in table 7 multiplied by 22.

**Table 7: Extra Weeks Allowance**

<b>Place where the student is studying and living</b>	<b>Extra Weeks Allowance</b>
(a) Studying in London and living away from the parental home during the course.	£108
(b) Studying outside London and living away from the parental home during the course.	£84
(c) Living at the parental home during the course.	£56

## How the maintenance award is paid

5.5 The maintenance award will continue to be paid directly to the student’s bank or building society account in instalments or after receipt of the appropriate claim. In particular:

(a) Any practice placement expenses payments will only become payable after the relevant expenses claim has been received, approved and processed.

(b) Any disabled students allowance payments will only become payable after the appropriate documentation has been received, approved and processed.

(c) All other elements of the maintenance award, including the non-means tested grant and any extra weeks allowances will be paid monthly, as far as practicable in equal monthly instalments.

## Deduction on account of the student’s income

5.6 The amount deducted from a maintenance award on account of a student’s own income is the student’s income after tax in the academic year from any source, but disregarding:

- (a) In relation to the specific types of income set out in table 8, the whole amount of that income.
- (b) In relation to the specific types of income set out in table 9, income of that type up to the maximum amount set out in the table.

5.7 Any payments that would be income if they were made to the student rather than to a third party on the student’s behalf will be deemed to be the student’s income.

5.8 The amount of any payment for the maintenance of the student’s child or former spouse or civil partner under a court order or binding agreement, voluntary agreement, instrument or enactment will be deducted from the student’s income after tax before calculating the deduction from the maintenance award.

5.9 Where the student’s spouse, civil partner, partner, child or step-child is also in receipt of an NHS Bursary or other publicly funded student support, for which the student is deemed to make a contribution, the student’s contribution to their own support will be reduced in proportion to the number of persons for whom they are deemed to be making a contribution.

### Table 8: Student’s income which is exempt

<b>Types of income which are exempt</b>
(a) Any income received by a student, who is not an independent student, from a parent, spouse, civil partner or partner from whom a contribution is deemed to be made under these rules, including any such contribution made through a trust, covenant or other similar instrument.
(b) Any pension, allowance or other benefit paid by reason of a disability to which the student is subject and any war widows or war widower’s pension.
(c) Any bounty received as a reservist with the armed forces.
(d) Remuneration for work done during any academic year of the student’s course, if it is a full-time course.
(e) Any payment made for a specific educational purpose other than to meet such tuition fee contributions and maintenance requirements as are specified in the NHS Bursary Scheme.
(f) Any payments under the EU Action Scheme, or the EU scheme for the mobility of

### Types of income which are exempt

academic authority students known as ERASMUS or other EU or EEA programmes for the encouragement of the mobility of students.

(g) Any payment to the student by way of a student loan or from the academic authority's own hardship funds, or an NHS Hardship Grant under this scheme.

(h) Child tax credits and working tax credit under the Tax Credits Act 2002 and income support.

(i) Any housing benefit or council tax benefit under a statutory or local scheme under part VII of the Social Security Contributions and Benefits Act 1992 or any council tax benefit under a statutory or local scheme under that Act.

(j) Child benefit under part IX of the Social Security Contributions and Benefits Act 1992.

(k) Any other payments made to the eligible student for the maintenance of a child legally in the student's care by virtue of a court order or other binding agreement, voluntary agreement, instrument or enactment.

### Table 9: Student's income which is disregarded

Type of Income	Amount Disregarded
(a) Sponsorship income, or remuneration for work done while on a part-time course.	Up to £4,921
(b) Income under a trust deed or similar instrument where the student is an independent student.	Up to £2,306
(c) Any pension, allowance or other benefit payable by reason of incapacity to which the student is subject, his or her old age, retirement, the death of a spouse, civil partner, parent or other person on whom the student was dependent, or by reason of his military or public service.	Up to £3,959
(d) Any income not otherwise disregarded for either:	
(i) a single parent	Up to £2,270
(ii) a single independent student	Up to £8,891
(iii) any other student	Up to £1,044

### Contribution by a student's parents

5.10 Unless the student is an independent student as defined in paragraph 5.18, a contribution towards the student's maintenance is assumed to be made by any parent if their total income before tax and after any deductions allowed in table 10 below, is in excess of

the threshold set out in table 11 below. Where it is, the excess is the parents' residual income for the purpose of determining the assumed contribution in paragraph 5.16.

5.11 Where the student's parents are no longer ordinarily living with each other the NHSBSA will take into account for the purposes of paragraph 5.10 the income of the parent the NHSBSA considers to be the more appropriate in the circumstances.

5.12 Where the student's parents are assumed to make a contribution, the amount is determined under the rules in paragraphs 5.16 and 5.17, and this amount is deducted from the student's maintenance award irrespective of the actual contribution, if any, made by the parents.

5.13 Where the student's parent(s) are in receipt of publicly funded student support or they are deemed to provide a contribution to another child or children who is/are in receipt of publicly funded student support, their contribution shall be reduced in proportion to the number of persons for whom they are deemed to be making a contribution.

## **Contribution from a spouse, civil partner or partner**

5.14 A contribution towards the student's maintenance is assumed to be made by a student's spouse, civil partner or partner, provided they are not separated, and the spouse, civil partner or partner has an income before tax, after any deductions allowed in table 10, in excess of the threshold set out in table 11. Where it is in excess of the threshold, the excess is the spouse's, civil partner's or partner's residual income for the purpose of determining the assumed contribution in paragraph 5.16.

5.15 Where the student's spouse, civil partner or partner is assumed to make a contribution, the amount is determined under the rules in paragraphs 5.16 and 5.17, and this amount is deducted from the student's maintenance award irrespective of the actual contribution, if any, made by the spouse, civil partner or partner.

## **Amount of any contribution**

5.16 The amount of the contribution assessed and to be deducted from the student's maintenance award is the amount in relation to the student's parents, spouse, civil partner or

partner’s residual income that is set out in table 11, less any deduction allowed for other children set out in table 11, and subject to the minimum contribution also set out in table 11.

5.17 For the purposes of paragraphs 5.10 to 5.15, the income before tax of a parent, spouse, civil partner or partner will be assessed for the last UK tax year ending before the academic year for which the maintenance award is being determined unless:

(a) the NHSBSA are satisfied that the income of a parent or spouse or civil partner or partner is wholly or mainly derived from the profits of a business or profession carried out by that person, in which case his or her income from that business will be assessed by reference to the latest available annual accounts of that profession or business, or

(b) the NHSBSA are satisfied that, for reasons outside the control of a parent or spouse or civil partner or partner, their income before tax in the academic year for which their contribution is being assessed is likely to be no more than 85% of their income in the last UK tax year ending before that academic year, in which case the assessment will be made by taking as the residual income the average of the residual income for each of the tax years in which that academic year falls.

**Table 10: Deductions allowed from the income of a Parent or Spouse or Civil partner or Partner**

Income	Amount of Deduction
(a) Any income which is exempt from tax under the Income Tax Acts or would be exempt under those Acts if the income were taxable in the UK rather than overseas.	The whole amount
(b) Pension contributions which are eligible for tax relief in the UK or would be eligible for relief if the income applied to them were taxable in the UK rather than overseas.	The whole amount
(c) Any payments made to the parent, spouse, civil partner or partner of the student under an order of a competent court for the benefit of a child who is not the parent’s child, but for whom he or she has custody or care or for whom he or she provides accommodation.	The whole amount

**Table 11: Threshold, Rates of Contribution and Deductions from the Contribution of a Parent or Spouse or Civil partner or Partner**

<b>Threshold and Rate</b>	<b>Amount</b>
(a) Parent's contribution threshold.	£24,279
(b) Spouse's, civil partner's or partner's contribution threshold.	£24,279
(c) Parent's contribution for each complete £9.50 of residual income.	£1
(d) Spouse's, civil partner's or partner's contribution for each complete £9.50 of residual income.	£1
(e) Minimum contribution.	£45
(f) Deduction for each child of the parent or the parent's spouse or civil partner or partner, other than the student	£95

## **Definition of an Independent student**

5.18 A student is regarded as an independent student if the student can demonstrate that he or she:

(a) Has supported him or herself out of his or her own earnings before the first academic year of the course for periods aggregating at least 3 years; or

(b) would meet the condition in paragraph 5.18(a) if any period or periods were included for which the student was:

(i) participating in arrangements for training for the unemployed under any scheme operated, sponsored or funded by a State authority;

(ii) in receipt of benefits payable by a State authority in respect of a person who is unemployed but available for work;

(iii) available for employment and had complied with any requirement imposed by a State authority as a condition of receiving benefits or training described in paragraphs 5.18 (b) (i) and (ii);

(iv) in receipt of a state studentship or similar award;

- (v) in receipt of any pension, allowance or other benefit paid by reason of a disability to which the student is subject, or by reason of maternity, injury or sickness, paid by any person;
- (c) is or has been married or in a civil partnership at the start of an academic year; or
- (d) has no parent living; or
- (e) is irreconcilably estranged from his or her parents; or
- (f) has satisfied the NHSBSA that his or her parents cannot be found or that it is not reasonably practicable to get in touch with them; or
- (g) is a care-leaver; or
- (h) is a member of a religious order who lives in a house of his or her order; or
  - (i) is a student whose parents are residing outside the EU in circumstances where the assessment of a parental contribution would put them in jeopardy or that it would not be reasonably practicable for them to send any such contribution to the UK; or
- (j) is responsible or has joint custody for the care of a person under the age of 18 who is dependent on the student. Students who qualify on this ground retain that status for the period of eligibility.

## 6. Section 6. Disabled Students Allowances

6.1 Where a disabled student qualifies for a full bursary, an allowance for the following costs will be added to his or her maintenance award, up to the limit set out in table 12, subject to the conditions in paragraphs 6.2 to 6.6, provided the NHSBSA are satisfied in each case that it is reasonable in the light of that student's assessed needs for the student to have incurred that additional expenditure to participate in the course.

6.2 Disabled Students Allowances (DSAs) will not be included as part of the maintenance bursary award for students who commenced an eligible part-time course on or after 1 August 2017 and before 31 July 2018, as set out in paragraph 1.1(c). Students with disabilities who fall under this para will need to apply to SLC for DSAs. The allowances payable by SLC are equivalent to the DSAs included in these rules and details can be found at [www.gov.uk/disabled-students-allowances-dsas/overview](http://www.gov.uk/disabled-students-allowances-dsas/overview)

6.3 These costs are:

- (a) The cost of employing a non-medical personal helper;
- (b) Major items of specialist equipment and any reasonable costs associated with the use and ownership of that equipment needed to attend or participate in the course such as insurance, warranty, repair or modification;
- (c) Additional expenditure for travel in the UK, reasonably incurred by reason of the student's disability, to attend or participate in the course or a practice placement arranged as part of the course;
- (d) Any other costs, which exceed the limits applicable to the items at sub- paragraphs (a) to (c), which the student is obliged to incur to attend or participate in the course and which do not arise irrespective of attendance at the course, including the assessment by a qualified person or body of a disabled student's course-related needs;

6.4 A student will be eligible for Disabled Students Allowances (DSAs) if it appears to the NHSBSA that the student is likely to satisfy the definition of a disabled person contained in the Equality Act 2010. In order to assist the NHSBSA in forming a reasonable view of the student's needs, the student must provide an assessment of his or her needs, made by an assessment centre approved by the Department for Education (DfE).

6.5 Any requests made by a disabled student's non-medical helper to the NHSBSA for additional funding for the student will be considered by the NHSBSA in conjunction with the non-medical helper and / or the assessment centre that carried out the original assessment. Once a decision is made, the NHSBSA will inform all parties of the outcome. Where the request is a significant increase, the student may need to be reassessed.



6.6 A disabled students allowance is personal to the student and may not be used to contribute to the infrastructure, administrative or pastoral costs of the academic authority concerned, or to other services which it might reasonably be expected to provide. The allowance may not be paid to any third party without the written consent of the NHSBSA and the student.

6.7 Any equipment purchased becomes and remains the property of the student.

**Table 12: Rates of Disabled Students Allowance**

Type of Cost	Maximum Amount
(a) Non-medical Helper	£20,725 for each academic year
(b) Equipment	£5,214 for the whole course. For the cost of a computer, DSA entitlement is the amount equal to the purchase cost of the computer less £200
(c) Travel	Actual cost for each academic year
(d) Other costs	£1,741 for each academic year

6.8 The Secretary of State for Health and Social Care has the discretion to determine whether the additional costs a student is obliged to incur in connection with undertaking a course because of their disability will be covered by DSAs. This reflects the support that academic authorities should be providing under their duty to make reasonable adjustments under the Equality Act 2010. The detail on how this discretion will be exercised is published in the NHSBSA guidance: Student Services Disabled Students Allowances (DSAs).

6.9 All disabled students applying for DSAs for the first time in respect of an academic year beginning on or after 1 September 2016 are required to contribute £200 towards the cost of any computer provided under the DSAs. This is considered to be the minimum cost that any student is likely to incur when buying a computer.

6.10 Under the DSAs travel allowance, reimbursement to the student of the receipted cost of taxi journeys will be limited to less than 15 taxi journeys per academic year. For those students who require more than 15 taxi journeys per academic year, the NHSBSA will require an account to be set up with the taxi company listed on the students DSA Funding Award letter and payment will be made directly to that company (on receipt of an appropriate invoice) by the NHSBSA for the student’s agreed journeys.

## 7. Section 7. Practice Placement Expenses

7.1 Students who qualify for a full bursary are entitled to have some of the additional costs arising from attendance at a practice placement added to their maintenance award, provided a valid claim is made within nine months of the cost being incurred. These costs are specified in paragraphs 7.2 and 7.3 and calculated on the basis of the rules in paragraph 7.7, subject to the limits set out in table 13.

7.2 The costs that are added to the maintenance award are those costs of a type described in paragraph 7.3 below, which must:

(a) be necessarily and reasonably incurred as part of attending a necessary part of the course which constitutes supervised clinical practice at premises other than those of the academic authority providing the course. Those premises may be located either within the UK or overseas.

(b) not already covered in full or in part by the disabled students allowances set out at section 6.

7.3 The types of cost that can be added while on practice placement are as follows:

(a) the cost of temporary accommodation near the clinical practice site where it is not practicable for the student to travel there from his or her normal accommodation on a daily basis, provided that the temporary accommodation is not the parental home;

(b) the cost of travel arising from the practice placement which exceeds the cost of travel in term time between the student's normal accommodation and the academic authority providing their course, as follows;

(i) for students attending a full-time course, this is the daily cost of their daily travel between their normal accommodation and higher education institution; and

(ii) for students attending a part-time course, this is the cost of their weekly travel between their normal accommodation and higher education institution.

(c) This will either be:

(i) any excess cost arising from daily travel between the student's normal accommodation and the practice placement site, or

(ii) any excess cost arising from one weekly return journey between the student's normal accommodation and their temporary accommodation, and

(iii) any excess cost arising from daily travel from the temporary accommodation to the practice placement site.

(d) the additional cost of being required to travel to visit other practice placement sites or the homes of patients while on practice placement, where the student is not given free transport.

(e) Where the student is attending a part of the course overseas, the additional travelling costs necessarily incurred within or outside the UK that are in excess of the student's normal daily cost of travel between their normal accommodation and the academic authority they usually attend, and any essential associated costs for accommodation, medical insurance, tests and any fees for visas;

7.4 Other costs arising in connection with practice placements such as the costs of refreshments, tips and phone calls will not be reimbursed.

## Means of travel

7.5 Students are expected to travel by the cheapest form of transport available where it is reasonably practical to do so. A student may claim reimbursement of the cost of using a private motor vehicle if this is their preferred method of travel. The student must ensure they use the most cost-effective routes for all journeys for which they are claiming, where practicable.

7.6 Students who choose to travel in their own private motor vehicle should:

(a) ensure that they have adequate insurance cover for all risks associated with this use of the motor vehicle; and

(b) understand that travelling in their own private motor vehicle they do so at their own risk; and

(c) be aware that the provision in these rules for re-imbusement of the costs of travel by private motor vehicle do not constitute any acceptance of liability by the academic authority, the NHSBSA or any other NHS body for the risks arising from the use of the private motor vehicle concerned.

## Calculation of the amount to be reimbursed

7.7 For the purposes of these rules the cost to be reimbursed is calculated on the following basis:

(a) For travel, the costs are:

- (i) the receipted cost of travel by the most direct route by public transport using the most favourable rates, concessionary schemes or facilities available to the student; or
- (ii) where the student travels in a private motor vehicle, or hire car where appropriate, the distance travelled by the most direct route at the mileage rate set out in table 13, and the actual receipted cost of any parking, tolls or ferries necessarily incurred on that journey;
- (iii) less the cost of daily or weekly travel in term time (as set out in paragraph 7.3(b)(i) or (ii), whichever is applicable) between the student's normal accommodation and the student's academic authority for the relevant period and calculated as described in sub-paragraphs (i) and (ii).

(b) For temporary accommodation the costs are the actual receipted cost of the temporary accommodation up to the limits set in table 13. Receipts should be in the format prescribed by the NHSBSA and;

- (i) be addressed to, or otherwise include, the name of the student making the claim; and
- (ii) include all dates for which the accommodation was both booked and used as well as the exact nightly cost(s) that were charged for each night.

(c) For all other costs reimbursable under the rules above, the actual receipted cost.

## **Application for reimbursement**

7.8 Students must submit claims for practice placement expenses, including the appropriate receipts, to their academic authority in the format required by the NHSBSA.

7.9 All claims must be checked by the academic authority before they are sent to the NHSBSA. It is their responsibility to authorise and confirm the validity of each student's claim in line with the requirements set out in this section.

7.10 Without exception, reimbursement for practice placement expenditure will only be issued to the student and not to a third party.

7.11 Where practice placement accommodation is booked by the academic authority on behalf of the student, any invoices issued to the student for payment of the accommodation must include:

- (a) the start and end dates of the booking and;

(b) the actual nightly cost charged by the accommodation provider, which may not necessarily be the same as the maximum nightly rate limit shown in table 13.

7.12 Dates claimed for placement accommodation must only be those where the student actually stays in that accommodation. Costs should not be claimed for any individual nights the student chooses not to stay on the premises, but consideration may be given by the NHSBSA for reimbursement of cost-effective block bookings made by the student, or on their behalf by the academic authority, where weekends may be required to be included as part of the booking.

## Time limit

7.13 No reimbursement will be made in respect of claims presented more than nine months after the relevant costs were incurred.

**Table 13: Limits on reimbursable Practice Placement Expenses**

<b>Cost</b>	<b>Limit</b>
(a) Public transport	Actual cost
(b) Travel in or on the student's own vehicle: Pedal Cycle Motor vehicle Additional reimbursement for a student passenger who is also travelling to a practice placement Parking, Tolls and Ferries	20p per mile 28p per mile 5p per mile Actual cost
(c) Temporary accommodation: Commercial accommodation Non-commercial accommodation	Up to £55 per night Up to £25 per night

## 8. Section 8. Other Allowances

8.1 Students who are eligible for a full bursary may also qualify for additional allowances. These allowances are:

- (a) A dependants allowance (paragraphs 8.2 to 8.6).
- (b) A parent learning allowance (paragraph 8.7).
- (c) A childcare allowance (paragraphs 8.8 to 8.11).

### Dependants Allowance

8.2 Where a student qualifies for a full bursary, a dependant's allowance will be added to the student's maintenance award in respect of those persons ordinarily resident in the UK who are wholly or mainly dependent on the student, and who are not:

- (a) in receipt of an NHS Bursary or other publicly funded student support, or
- (b) a spouse, civil partner or partner with whom the student no longer ordinarily lives (whether or not there is a formal separation).

8.3 *8.3 Subject to paragraph 8.6, the amount of dependant's allowance to be added to the student's maintenance award in each academic year will be any positive result determined by the following formula:*

*TDA-TDNI*

*Where TDA is the total of the entire dependant's allowances for the student's dependants as set out in table 14, and TDNI is the total of his or her dependants' net incomes after income disregards as calculated in paragraph 8.4.*

8.4 The total of the dependants' net incomes after income disregards for the purposes of determining how much dependants allowance is payable under paragraph 8.3 is:

- (a) The total income after tax of all the dependants in the last UK tax year prior to the commencement of the course year concerned, after disregarding any pensions, allowances or benefits (including those paid to them by reason of their disability) and not subject to tax under the Income Tax Acts;

(b) Less so much of the total amount of income disregarded when the income disregards specified for each dependant in table 14 are added together, as does not exceed the total income after tax calculated under sub-paragraph 8.4(a).

(c) Where the spouse, partner or civil partner make any recurrent mortgage or rent payments which were previously made by the student under an obligation incurred before the first academic year of the student's course, an amount equivalent to these payments will be disregarded from their income.

8.5 For the avoidance of doubt, any of the following paid to the student in relation to the dependant, are not regarded as part of the dependant's income for the purposes of the calculation in paragraph 8.4:

(a) any child benefit paid under Part IX of the Social Security Contributions and Benefits Act 1992; and

(b) any other payments made to the eligible student for the maintenance of a child legally in the student's care by virtue of a court order or other binding agreement, voluntary agreement, instrument or enactment; and

(c) any payment made by an adoption agency under regulations under section 4 of the Adoption and Children Act 2002; and

(d) any payment of a guardian's allowance under Section 77 of the Social Security Contributions and Benefits Act 1992; and

(e) any payment made under section 23 of the Children Act 1989 in respect of a child in the care of a local authority who is boarded out with the student; and

(f) any payment made under an order made under Section 34 of the Children Act 1975 in respect of a child who is not a child of the student or the student's spouse, civil partner or partner; and

(g) any payment made under Section 15 and Schedule 1 to the Children Act 1989 in respect of a child who is not a child of the student or the student's spouse, civil partner or partner; and

(h) any assistance given by a local authority under Section 24 of the Children Act 1989 in respect of a child who is not a child of the student or the student's spouse, civil partner or partner.

8.6 If a dependant is also the dependant of the student's spouse or civil partner, and the spouse or civil partner is receiving publicly funded student support which takes account of the requirements of the dependant, then the amount added to the dependant's allowance in respect of that dependant is half the amount determined under paragraph 8.3.

**Table 14: Rates of Dependants Allowances**

**Dependants Allowance and Income Disregarded in Calculation of Allowance**

<b>Person</b>	<b>Allowance</b>	<b>Income Disregarded</b>
(a) Spouse, civil partner, partner or other dependent adult	£2,448	£1,000
(b) First child if there are no dependent adults	£2,448	£1,000
(c) Any other children whose age on the first day of the academic year is under 19	£549	£1,000

**Parent Learning Allowance**

8.7 A student who is entitled to receive a dependant’s allowance under paragraphs 8.2 to 8.6 in respect of a child under the age of 19 years, will receive the more favourable of the following adjustments:

- (a) The amount of the student’s own income which is disregarded for the purposes of the maintenance award is increased as specified in entry (a) of table 15 for the parent learning allowance; or
- (b) The dependant’s allowance is increased by the amount of the parent learning allowance as specified in entry (b) of table 15; or
- (c) A higher amount of their own income is disregarded as specified in entry (c) of table 15.

**Table 15: Rates of Parent Learning Allowance**

<b>Form of Parent Learning Allowance</b>	<b>Rate</b>
(a) (i) higher standard income disregard (ii) single independent student disregard	£2,270 £8,891
(b) Parent learning allowance	£1,204
(c) Parent learning allowance disregard for a first child and for each subsequent child for a single independent student	£3,035 £960



## Childcare Allowance

8.8 Where a student;

(a) qualifies for a full bursary and;

(b) has parental responsibility for a child who is:

(i) under 15 years of age on the first day of the academic year or

(ii) under 17 years of age if the child is registered with special educational needs within the meaning of section 20 of the Children and Families Act 2014, a childcare allowance in relation to childcare of a type set out in paragraph 8.9 will be added to the student's maintenance award in respect of childcare costs up to the maximum amount and at the rate set out in table 16, subject to the exclusions set out in paragraphs 8.10 and 8.11.

8.9 The types of childcare for which a childcare allowance is payable are:

(a) childcare provided by persons registered under the Childcare Act 2006 and on:

(i) the OFSTED Early Years Register (EYR) for children under 5; or

(ii) the OFSTED compulsory part of the General Childcare Register for children aged 5 to 7; or

(iii) the OFSTED voluntary part of the General Childcare Register (GCR) for children aged 8 or over.

(b) childcare provided by out-of-school clubs run on school premises by a school or a local authority or by a third-party provider who is registered with OFSTED or equivalent body.

(c) childcare provided in the child's own home by a care worker or nurse from an agency registered with the Care Quality Commission under the Care Standards Act who is expected to comply with the Domiciliary Care Agencies Regulations 2002 or the Nurses Agency Regulations 2002 as appropriate.

(d) Care provided by an approved foster carer (the care must be for a child who is not being fostered by the foster carer) who is also registered with OFSTED either on the EYR or the GCR

(e) Childcare provided in Wales, Scotland or Northern Ireland, and registered by:

(i) The National Assembly for Wales through the Care and Social Services Inspectorate for Wales or under the Approval of Child Care Providers (Wales) 2007 Scheme where the childcare is provided in the child's own home;

(ii) Social Care and Social Work Improvement Scotland (SCSWIS);

(iii) The local Health and Social Care Trust (Northern Ireland) or approved by the Approval of Home Child Care Providers (Northern Ireland) Scheme 2006, if the care is in the child's home.

8.10 No childcare allowance will be payable where the student, spouse, civil partner or partner is in receipt of the following:

(a) The childcare element of Working Tax Credit or the child element of Universal Credit;

(b) Tax Free Childcare;

(c) Financial support for childcare provided under the following regulations and guidance

(i) The Education (Student Support) Regulations 2011, as amended;

(ii) The Nursing and Midwifery Student Allowances (Scotland) Regulations 2007, as amended;

(ii) The Education (Access Funds) (Scotland) Regulations 1990;

(iv) The Education (Student Support) (No.2) Regulations (Northern Ireland) 2009, as amended;

(v) The Education (Student Support) (Wales) Regulations 2015; and

(vi) The NHS Wales Bursary Scheme.

8.11 Similarly, no childcare allowance will be payable in respect of:

(a) normal education provided by local authority, religious or private schools;

(b) free early education provided by the local authority;

(c) childcare where the registered provider is the student's spouse, civil partner or partner;

(d) childcare provided by a close relative of the child in the child's own home;

(e) childcare provided by a close relative of the child away from the child’s own home where the care is solely for the student’s children, or the student’s children and the close relative’s children.

**Table16: Rates of Childcare Allowance and maximum amounts**

Number of Children	Maximum Amount Eligible	Rate	Maximum Amount Payable
(a) For one child of the student	£151.50 per week	85% of gross actual cost	£128.78
(b) For two or more children of the student	£225.23 per week	85% of gross actual cost	£191.45

## 9. Section 9. Changes in Circumstances

9.1 This section of the rules applies to the following changes in a student's circumstances after an NHS Bursary has been awarded for a particular academic year:

- withdrawal from training;
- inability to complete the course;
- moving away from or back to home;
- transferring to another course;
- illness, injury or disability;
- maternity;
- paternity/maternity support;
- adoption;
- an extension to a course;
- marriage, civil partnership or living with a partner;
- loss of a spouse, civil partner or partner;
- loss of a parent;
- separation of parents;
- loss of an adult dependant;
- loss of a child;

- a change in eligibility for an NHS Bursary;
- a material changes in the income of the student, student's parent, spouse, civil partner or partner;
- cases of hardship on medical and dental courses.

9.2 In any other case where a student's circumstances change in a way which may affect their eligibility for an NHS Bursary, or the payments they are entitled to under an NHS Bursary, or the student's ability to meet the conditions attached to an NHS Bursary, the student should seek advice from the NHSBSA as soon as possible.

## **Withdrawal from training**

9.3 Where a student withdraws from a course, the student must notify the NHSBSA as soon as possible and no later than one month after the event.

9.4 Where the NHSBSA becomes aware that a student has withdrawn from a course, the NHS Bursary award will be terminated with effect from the date on which they withdraw.

## **Inability to complete the course**

9.5 Where a student ceases to be able to complete the course and qualify in the relevant profession the student and academic authority should notify the NHSBSA as soon as possible, and no later than one month after the situation becomes clear.

9.6 Where the NHSBSA becomes aware that a student will not be able to complete the course and qualify in the relevant profession, the NHS Bursary award will be terminated from a date which the NHSBSA consider appropriate in the circumstances.

9.7 Where a student who is enrolled on a part-time course commencing on or after 1 August 2017 subsequently withdraws or temporarily suspends their studies, and later returns to the course as a new student on or after 1 August 2018, they will no longer be eligible for a maintenance bursary from NHSBSA. However, exceptional cases where students have relevant mitigating circumstances will be considered between NHSBSA and the commissioner.

## **Moving away from or back to home**

9.8 Where a student changes his or her normal accommodation away from or to their parental home during an academic year, the student must notify the NHSBSA.

9.9 In these cases, the amount of the basic allowance set out in table 6, and the amount of any extra week's allowance set out in table 7, will be the aggregate of the basic allowance for the different locations for the parts of the year to which they apply. In calculating the amount due, the NHSBSA may treat part of the allowance as being in respect of holidays.

## **Transferring to another course**

9.10 If the academic authorities concerned agree that a student who is in receipt of an NHS Bursary should transfer to another course, then provided the new course is also eligible for an NHS Bursary under section 3 and does not require the student to restart the course from the first day, the student's NHS Bursary award may be transferred to the new course<sup>10</sup>.

9.11 If the requirements at 9.10 are met, the student's NHS Bursary award may be extended for up to 12 months to allow the student to continue to receive an NHS Bursary for the period ordinarily required to complete the new course.

## **Illness, injury or disability**

9.12 A student may continue to receive their NHS Bursary during periods of authorised absence due to a medically certified illness or injury of up to 60 days in an academic year, including any holidays which intervene between continuous periods of absence due to illness or injury at the end of one term and the beginning of the next.

9.13 If a student's illness or injury requires more than 60 days leave to be taken in an academic year, the student must inform the academic authority and the NHSBSA as soon as possible and no later than one month after it is known that more than 60 days leave will be required. An NHS Bursary award will be suspended from the 61st day of absence until the student returns to the course. If during or after the 60-day period, the student informs the academic authority and the NHSBSA that they will not be returning to the course, then the NHSBSA will withdraw the NHS Bursary award from the day it becomes known that the student will not be returning. An NHS Bursary award may also be withdrawn if, after consulting the academic authority concerned, the NHSBSA consider that the student is unlikely to be able to complete the course and qualify in the relevant profession.

<sup>10</sup> Continuing non-medical students on eligible undergraduate part-time courses: Where a student who is eligible for a bursary maintenance award from NHSBSA subsequently transfers to a full-time course, either at the same or a different higher education institution, maintenance bursary funding from NHSBSA will no longer be payable from the date the change takes effect or for any subsequent transfer back to a part-time programme

9.14 Where a student becomes disabled during the course, they should notify the NHSBSA as soon as possible, to establish whether a disabled student's allowance is payable. If an assessment by a person approved by the Disabled Students Allowances Quality Assurance Group (DSA-QAG) has not already been arranged, such an assessment will be needed to enable the NHSBSA to determine the additional needs of the student.

## **Maternity**

9.15 Subject to paragraphs 9.16 to 9.18, a student who is eligible for a full bursary is entitled to a maternity award of up to 12 months maintenance award in respect of maternity leave authorised by the academic authority providing the course.

9.16 A maternity award includes all elements of the maintenance award except those relating to actual attendance at the course. These elements are:

(a) practice placement expenses, and

(b) childcare allowance, and

(c) those elements of the disabled student's allowance's which relate solely to attendance at the course.

9.17 A student must apply for a maternity award in the form required by the NHSBSA, including confirmation by the academic authority of the period for which maternity leave has been granted.

9.18 The student should inform the NHSBSA when she returns from maternity leave in order to ensure her maintenance award continues after the end of her maternity leave, and that any additional allowances in relation to her child can be added to her maintenance award.

9.19 Only one maternity award will be made in relation to a single pregnancy, irrespective of how many children are born. The maternity award remains payable irrespective of whether the child or children concerned are still-born or die after birth.

## **Maternity support**

9.20 Subject to the conditions in paragraphs 9.21 to 9.23, a maintenance award will continue to be paid to a student for up to 4 weeks authorised leave granted to enable the student to provide support to a mother and child during and after childbirth. This is known as a maternity support award.

9.21 A student applying for a maternity support award will need to sign a declaration stating that he or she:

(a) is taking leave to care for the new-born child and mother, and

(b) has, or expects to have, responsibility for the upbringing of the child, and

(c) is the spouse, civil partner or partner of the child's mother or is the biological or adoptive father or nominated carer of the child.

9.22 A maternity support award applies to leave taken during and after the birth of the child, but not to leave taken before the birth of a child to support the mother during pregnancy. The leave may be taken at any time within the first year after the birth of the child, either as one four-week period or in several shorter periods which add up to four weeks. The maternity support award remains payable irrespective of whether the child or children concerned are still-born or die after birth.

9.23 Only one maternity support award will be made in relation to a single pregnancy, irrespective of how many children are born.

## Adoption

9.24 When a student who is eligible for a full bursary expects to become the primary carer for a child under 18 which they have adopted, they are entitled to an adoption award of up to twelve months maintenance award in respect of adoption leave authorised by the academic authority providing the course.

9.25 The adoption award runs from the date of placement of the child and includes all elements of the maintenance award except the following:

(a) practice placement expenses; and

(b) childcare allowance; and

(c) where applicable, those elements of the Disabled Students Allowances which relate solely to attendance at the course.

9.26 A student must apply for an adoption award in the form required by the NHSBSA, including confirmation by the academic authority of the period for which adoption leave has been granted.

9.27 Only one adoption award will be made in relation to a single adoption event, irrespective of how many children are adopted.



## **Extending the time normally required to complete the course**

9.28 If a student cannot complete the course in the time normally required because of maternity, maternity support or adoption leave, the NHS Bursary will be extended for up to twelve months to allow the student to complete the course.

9.29 Where the academic authority, with the prior approval of the commissioner or funding body, requires the student to repeat part of the course, the bursary may be extended for twelve months to allow the student to complete the course, provided the year being repeated was itself eligible for a bursary.

9.30 If a student cannot complete the course in the time normally required for any other reason, an NHS Bursary may be extended for up to twelve months to allow the student to complete the course. But in these circumstances an extension will only be granted if the NHSBSA, after consulting the academic authority and the course commissioner or funding body, conclude that there is a reasonable prospect of the student qualifying and, where the course has been commissioned by the NHS, that the commissioner or funding body is content to fund any additional cost of commissioning the additional tuition.

## **Marriage, civil partnership or living with a partner**

9.31 When a student marries, enters a civil partnership or commences living with a partner, they should notify the NHSBSA as soon as possible and no later than three months after the event to establish whether the marriage, civil partnership or partnership affects the amount of maintenance award to which they are entitled.

9.32 Where the spouse, civil partner or partner is required to make a contribution under these rules, the contribution in the academic year in which the marriage, civil partnership or partnership has started will be reduced in proportion to the part of the year in which the marriage, civil partnership or partnership existed.

## **Loss of a spouse, civil partner, or partner**

9.33 When a student loses a spouse, civil partner or partner through death, divorce, or separation, they should notify the NHSBSA as soon as possible after the event to establish whether the death, divorce or separation affects the amount of maintenance award to which they are entitled.

9.34 Where the spouse, civil partner or partner was required to make a contribution under these rules, the contribution in the academic year in which the loss occurs will be reduced in proportion to the part of the year which falls after the death, divorce, or separation.

## Loss of a parent

9.35 When a student loses a parent through death, they should notify the NHSBSA as soon as possible after the event to establish whether the death affects the amount of maintenance award to which they are entitled.

9.36 Where a parent dies after the parental contribution was assessed but before the academic year begins any parental contribution in the academic year will be assessed solely in relation to any surviving parent unless the loss of the parent means the student has become independent under paragraph 5.17.

9.37 Where a parent dies during the academic year, the parental contribution will be determined by reference to the income of both parents for the part of the academic year before the death occurred, and by reference to the income of the surviving parent in relation to the part of the academic year after the death occurred, subject to a maximum of the same proportion of the student's maintenance requirement.

## Separation of parents

9.38 When a student's parents separate, he or she should notify the NHSBSA as soon as possible and in any event within three months to establish whether the separation affects the amount of maintenance award to which they are entitled.

9.39 Where a student's parents separate after the parental contribution was assessed but before the academic year begins any parental contribution in the academic year will be re-assessed by reference to the income of the parent the NHSBSA considers to be the more appropriate in the circumstances.

9.40 Where a student's parents separate after the academic year has begun, the parental contribution will be determined on the basis of the income of both parents for the part of the academic year before the separation. For the part of the year after the separation the parental contribution will be determined by reference to the income of the parent the NHSBSA considers to be the more appropriate in the circumstances. But in no case will the single parent be assumed to make a contribution which is higher, as a proportion of the maximum maintenance grant which the student would receive in the absence of a parental contribution, than was the case before the separation.

## Changes in the dependency of adults or children

9.41 When an adult or child either becomes dependent on the student or ceases to be dependent on the student, the student should notify the NHSBSA as soon as possible and

no later than one month after the event to establish whether the change in dependants affects the amount of maintenance award to which they are entitled.

## **Changes in eligibility for a Bursary part-way through a year**

9.42 Where one of the events listed occurs in the course of an academic year the student should contact the NHSBSA as soon as possible and no later than one month after the event. The relevant events are set out below:

- (a) The State of which the student is a national accedes to the EU;
- (b) The student starts or ceases to work in the UK in one of the categories of workers, employed persons and self-employed persons in Table 1d entries (i) to (l), or is a family member of such a person.
- (c) The person becomes entitled to support as per Table 1d entry (m) (d) The person becomes a family member of an EU national
- (e) The person becomes the Child of a Swiss national; (f) The person becomes the Child of a Turkish worker;
- (g) The person acquires the right of permanent residence in the UK
- (h) The student, or the student's spouse, civil partner or parent is recognised as a refugee, or whose refugee status is cancelled, ceases or is withdrawn;
  - (i) The student, or the student's spouse, civil partner or parent is granted humanitarian protection, or their humanitarian protection is revoked or is not renewed;
  - (j) The student or the student's spouse, civil partner or parent becomes a person granted stateless leave, or the period for which the person granted stateless leave is allowed to stay in the United Kingdom has expired and no further leave to remain has been granted.

9.43 Where the NHSBSA conclude that the person has become eligible, and a bursary is awarded following a successful application, any maintenance award will be paid for that part of the academic year falling after the person became eligible and the amount payable for the year as a whole will be reduced accordingly.

9.44 Where the NHSBSA conclude that the person has ceased to be eligible for an NHS Bursary, and where the NHS Bursary includes a maintenance award, the maintenance award will cease from the point at which the person ceased to be eligible, and the amount payable for the year as a whole will be reduced accordingly.

## **A material change in the student's income, or the income of the student's parent, spouse, civil partner or partner;**

9.45 If there is a material change in a student's own income, or if there is a material change in the income of a parent, spouse, civil partner or partner, the student should notify the NHSBSA as soon as possible and no later than one month after the event to establish whether the change in income affects the amount of maintenance award to which they are entitled. If the dependents income used to assess the dependents award in paragraph 8.4 (a) reduces by 15% or more in the current academic year, then the student can apply for reassessment.

## **Cases of hardship on medical and dental courses**

9.46 Because of the length of medical and dental courses the Secretary of State for Health and Social Care has asked the NHSBSA to make a hardship grant to students who meet the following conditions. To be eligible for a medical and dental hardship grant the student must be:

- (a) on a course leading to registration as a doctor or dentist, and
- (b) eligible for a full bursary, and
- (c) in genuine hardship, and
- (d) unable to manage any shortfall between income and expenditure by their own actions.

9.47 An application for a hardship grant must be made in such a form and with such supporting information as the NHSBSA may require in order to assess the application, including details of the student's income and expenditure and whether the application is supported by the academic authority providing the course.

9.48 Where the NHSBSA agrees that a student meets the conditions in paragraph 9.47, a hardship grant of between £100 and £3000 may be made to assist the student.

9.49 In deciding the level of hardship grant to be made, the NHSBSA will not make allowance for:

- (a) making good a default in a contribution by a parent, spouse, civil partner or partner;
- (b) meeting practice placement expenses originally assessed as able to be met from the student's own income;

(c) meeting a temporary shortfall in income, such as where the student is awaiting payment of a maintenance award or reimbursement of practice placement expenses or requires a loan.

9.50 A hardship grant will only be paid where the student signs an undertaking to repay any sums which are overpaid or paid in circumstances where it later becomes clear that the student was ineligible for the grant.

## 10. Section 10. Conditions Applying to an NHS Bursary Award

10.1 An NHS Bursary is awarded and is payable subject to all of the following conditions. These are that:

- (a) The student continues to attend the course for which the bursary has been awarded, unless granted authorised leave of absence under paragraphs 9.12, 9.15, 9.20 or 9.24, or a transfer to another course is approved under paragraph 9.10 in section 10.
- (b) The student is not expelled from the course or refused permission to complete the course.
- (c) The student completes the course within the period ordinarily required for completion of the course unless a repeat year or other extension is approved under paragraphs 9.28 to 9.30.
- (d) The student supplies the NHSBSA with such information it considers necessary to determine eligibility for a Fees only bursary or Full bursary and any payment pursuant to it within one month of the request being made.
- (e) The student informs the NHSBSA as soon as possible and in any event no later than one month after:
  - (i) he or she abandons or withdraws from the course; or
  - (ii) he or she is expelled from the course; or
  - (iii) he or she ceases to attend the course and does not intend or is not permitted to return; or
  - (iv) he or she transfers to another course, whether or not the new course is an eligible course and whether or not it is at the same institution; or
  - (v) he or she interrupts training temporarily for reasons of pregnancy, childbirth, maternity support or adoption; or
  - (vi) he or she is absent from the course for up to 60 days because of illness or injury; or
  - (vii) he or she is absent from the course without the prior agreement of the academic authority for any period for any other reason; or
  - (viii) there is any change in the date for starting or completing the course;

or

(ix) it becomes clear that the student cannot complete the course and qualify in the relevant healthcare profession; or

(x) there is any change in his or her contact details; or

(xi) there is any change in the bank or building society account into which NHS Bursary payments are to be made.

(f) The student has not knowingly or recklessly supplied the NHSBSA with information which is false in a material particular.

(g) The student promptly repays any overpayment of an NHS Bursary when requested to do so by the NHSBSA.

(h) The student has not fraudulently obtained or fraudulently attempted to obtain an NHS Bursary or a payment under an NHS Bursary.

(i) The student has not in any other way shown by their conduct that it would be inappropriate to grant them an NHS Bursary award.

10.2 The NHSBSA may suspend, reduce or terminate an NHS Bursary award, or disqualify a student from future eligibility for a bursary if, after consulting the academic authority and the commissioner or funding body of the course as appropriate, it appears to them that the student is in breach of the conditions in paragraph 10.1 or if any other misconduct by the student while receiving a bursary is such, as to show that it would be inappropriate to grant them an NHS Bursary award. The NHSBSA may also suspend payment if requested to do so by NHS Protect or NHSBSA Local Counter Fraud Specialists pending enquiries concerning possible fraud in relation to the payment of an NHS Bursary.

10.3 The NHSBSA may also disqualify a student from future eligibility for a bursary if, after consultation with a NHSBSA Local Counter Fraud Specialist, they conclude that any breach of the condition set out in paragraph 10.1(f), or if any other misconduct by the student while receiving a bursary is such, as to show that it would be inappropriate to grant them an NHS Bursary award at any point in the future.

10.4 Where the NHSBSA suspends or reduces an NHS Bursary award because of the student's unauthorised absence, or the student's suspension by the academic authority, the suspension or reduction of the bursary may only be in relation to the period, including any holidays, between the start of the unauthorised absence or suspension and the student's return to the course.

10.5 Where an award is terminated, the NHSBSA will decide the date of termination, and this date may be different to the date on which the student abandoned, withdrew or was expelled from the course.



# 11. Section 11. Exceptions

11.1 The following table sets out a number of exceptions which the Secretary of State for Health and Social care has authorised the NHSBSA to make to the normal rules. For a student in the circumstances described in the first column of table 17 below, the exception listed in the second column will apply.

**Table 17 Exceptions to Rules**

<b>Rule</b>	<b>Circumstance</b>	<b>Exception</b>
Table 1	Where an area which was not previously part of the EU or EEA becomes part of one or both of these areas.	The area concerned is considered to have always been a part of the EU or EEA for the purpose of satisfying the residence and nationality requirements in table 1.
Paragraph 4.2 and 4.4	Where a medical or dental student is not in attendance on the course on 1 December of the year for which a fee is payable, due to illness or injury but returns to the course in the same academic year for which fees are applicable.	The rule that a medical or dental student must be in attendance on the course on 1 December is waived provided they return to the course in the same academic year period.
Paragraph 5.17(a)	Where no recent accounts are available for the business or profession.	The NHSBSA will accept a self- assessment used for tax purposes or an equivalent assessment.
Paragraph 5.18	Where a medical or dental student was supported by Student Finance England in the earlier years of their course and was deemed by them to be an independent student under DfE Student Support Regulations.	The NHSBSA will accept this assessment and the student will not be required to demonstrate that they meet the requirements set out at paragraph 5.18(a) to (j).
Paragraph 8.2	Where a student is maintaining a dependant, who is ordinarily resident outside the UK.	The NHSBSA may add an allowance for that dependant at a rate which they consider reasonable in all the circumstances, provided the

Rule	Circumstance	Exception
		amount does not exceed the amount that would have been allowed had the dependant been ordinarily resident in the UK.
Paragraph 8.4(a)	Where a dependant who is paid a pension, allowance or other benefit by reason of their disability, and that payment is taxable under the tax legislation of an EU state other than the UK but would not be taxable if that legislation made equivalent provision to UK Tax legislation.	The dependant's pension, allowance or other benefit paid by reason of their disability is disregarded in the calculation of the dependant's income.
Paragraph 9.12	Where a disabled student is absent from the course due to illness or injury for more than 60 days.	The NHSBSA in liaison with the academic authority will consider whether in the circumstances of the student's disability it would be reasonable to extend the 60-day limit.
Paragraph 9.15	Where a student on maternity leave is suffering from post-natal depression or another pregnancy related illness or is coping with the serious illness or loss of a baby.	The NHSBSA may extend the maximum 12-month period for a maternity award, subject to medical evidence.
Paragraph 9.16	Where a student was in receipt of a childcare allowance before going on maternity leave and has on-going contractual commitments to pay childcare costs.	The NHSBSA may continue to pay a childcare allowance in respect of those costs while the commitment continues, provided they are satisfied that the commitment was reasonably incurred.
Paragraph 9.24	Where a student on adoption leave is coping with the serious illness or loss of the adopted child.	The NHSBSA may extend the maximum 12-month period for an adoption award, subject to medical evidence.
Paragraph 12.5(a)	Where a student was born in the UK but his or her birth	The student may provide alternative documentation

<b>Rule</b>	<b>Circumstance</b>	<b>Exception</b>
	was not registered, and no adoption certificate is available.	after consulting the office of national statistics, but nothing in this exception requires the NHSBSA to accept alternative documentation which they consider unsatisfactory.

## 12. Section 12. Applying for an NHS Bursary

12.1 A student must apply to the NHSBSA for each academic year in which the course runs, as required by the NHSBSA.

12.2 The re-application for another year's funding under an existing NHS Bursary must be made in the form prescribed by the NHSBSA and within the first nine months of the current academic year of study.

12.3 The applicant must give a written undertaking that the particulars given are correct to the best of his or her knowledge and belief, and that he or she will notify the NHSBSA promptly of any change which might affect his or her eligibility for an NHS Bursary or the payments which he or she receives under an NHS Bursary.

12.4 The applicant, or if he or she is under the age of 18 a person with parental responsibility for them, must give a written undertaking that, where any payment under an NHS Bursary exceeds the amount payable under these rules for the academic year concerned, the person signing the undertaking will, if called on to do so, repay the excess amount.

12.5 The applicant must provide such evidence as the NHSBSA may require to demonstrate his or her eligibility for a bursary, including either:

- (a) if the student was born in the UK, his or her birth certificate, or, if adopted, the adoption certificate; or
- (b) if the student was born outside the UK, including in the Islands, his or her passport and a letter or other document (which could be the student's birth certificate) signed by a consular officer, a minister of religion, a medical or legal practitioner, an established civil servant, a teacher or a police officer, giving details of his or her place and country of birth and of his or her name at birth; or
- (c) if the student believes they have refugee status, or leave to enter or remain in the UK, the official letter of recognition from the home office or one of its agencies and a letter or other document (which could be the student's birth certificate) signed by a consular officer, a minister of religion, a medical or legal practitioner, an established civil servant, a teacher or a police officer giving details of his or her place and country of birth and of his or her name at birth; or
- (d) an "Assessment of Eligibility for Financial Support for Higher Education" for the academic year concerned, issued by Student Finance England in the UK provided the NHSBSA is satisfied that the evidence referred to in paragraph 12.5(a) or (b) or (c) has been produced in support of a previous application for publicly funded student support.

12.6 The normal procedure is as follows:

(a) For students on courses leading to professional registration as a doctor or dentist, the academic authority will notify the NHSBSA of any students who will be starting a year of the course which is eligible for an NHS Bursary. Students are required to apply directly to the NHSBSA for their NHS Bursary.

(b) For students already in receipt of an NHS Bursary, the NHSBSA will contact the student with information on how to apply for a further year's funding.

12.7 A student who is expecting to attend another year of a course, which he or she believes to be eligible for an NHS Bursary, should apply online as soon as they believe they are eligible for a bursary as set out in paragraph 12.6 (a) and (b).

# 13. Section 13. Complaints Appeals and Reviews

## Complaints

13.1 If a student is concerned about the way in which an NHS Bursary application, bursary payment or any other matter in relation to an NHS Bursary is being dealt with, the student should first contact the NHS Bursary Helpline on 0300 330 1345. This is likely to be the fastest way to resolve any issues about a current payment or application.

13.2 If a student remains dissatisfied with the way in which an NHS Bursary application, bursary payment or any other matter in relation to an NHS Bursary has been dealt with, the student may make a formal complaint to the NHSBSA in writing to:

The Review Section NHSBSA Student Services Hesketh House  
200-220 Broadway  
Fleetwood  
FY7 8SS

Or by email to: [nhsbsa.bursarycomplaints@nhs.net](mailto:nhsbsa.bursarycomplaints@nhs.net)

13.3 The Secretary of State for Health for Health and Social Care has asked the NHSBSA to treat all complaints in a fair, objective and consistent manner; to take corrective and remedial action where possible; and to identify any areas for improvement in the operation of the NHS Bursary Scheme.

13.4 If a student has exhausted the NHSBSA formal complaints procedure and believes their complaint has been inappropriately or unfairly dealt with by the NHSBSA, the student may complain to the Department of Health and Social Care in writing. A student should include in their letter their explicit consent that the Department of Health and Social Care may share the necessary personal information with the NHSBSA, Health Education England (HEE) or the relevant Local Office of HEE in order to investigate their complaint fully. This is to ensure compliance with the Data Protection Act. The Department aims to respond to complaints within 20 working days, A student should write to:

NHS Bursary Complaint  
F.A.O. Rikki Ismail  
NHS Workforce: Education, Modernisation & Funding  
Department of Health and Social Care  
Quarry House Quarry Hill Leeds  
LS2 7UE

## Reviews

13.5 Where a student believes a decision made by the NHSBSA in relation to an NHS Bursary is incorrect, they may ask for the decision to be reviewed. Such a review can include, but is not limited to, the following matters:

- (a) the outcome of a bursary application,
- (b) a decision on the amount of bursary payable,
- (c) suspension, reduction or termination of a bursary.

13.6 The request for a review should be made within 28 days of notification of the decision.

13.7 Any application for a review must be made in writing to:

The Review Section  
NHSBSA Student Services  
Hesketh House  
200-220 Broadway  
Fleetwood  
FY7 8SS

Or by email to: [nhsbsa.bursarycomplaints@nhs.net](mailto:nhsbsa.bursarycomplaints@nhs.net)

## Appeals

13.8 If after being informed of the result of a review a student continues to believe that a decision made by the NHSBSA in relation to an NHS Bursary is incorrect the student may appeal to the Department of Health and Social Care.

13.9 The request for an appeal should be made within 28 days of notification of the decision of the review. The Department aims to respond to appeals within 20 working days.

13.10 Any application for an appeal to the Department of Health and Social Care must be made only after the review process has been completed by the NHSBSA and be made in writing. A student should include in their letter their explicit consent that the Department of Health and Social Care may share the necessary personal information with the NHSBSA, HEE or the relevant Local Office of HEE in order to investigate the student's appeal fully. This is to ensure compliance with the Data Protection Act. A student should write to:

**NHS Bursary Scheme New Rules 2020/21**

NHS Bursary Appeal  
FAO: Rikki Ismail  
NHS Workforce: Education Modernisation & Funding  
Department of Health and Social Care  
Quarry House Quarry Hill Leeds  
LS2 7UE

Email: [educationandtraining@dhsc.gov.uk](mailto:educationandtraining@dhsc.gov.uk)



## 14. Section 14. Glossary

Words and Phrases with Special Meanings	Special Meaning in These Rules
Academic authority	The institution of Higher Education which is providing the course for which a particular NHS Bursary has been awarded, including a person acting with the authority of such an institution.
Academic year	The Academic year is a period of 12 months starting from the first date of the first term in that period, as provided to the NHSBSA by the relevant academic authority.
Care leaver	A person who, as a result of an order of a competent court, was in care for at least 3 months up to or after their 16th birthday and has not since been returned to the care of their parents. In this context “in-care” means in the custody or care, or provided accommodation by a state authority, or national, or regional or local authority, or a voluntary or charitable organisation, or any other person who is not their parent.
Child of a refugee	A person who is the natural, adopted or step-child or ward of a Refugee and who was under 18 years of age when the refugee made their asylum application or, if no such application was made, under 18 years of age when leave to enter or remain was granted.
Child of a Swiss national	A person who is the natural, adopted or step-child or ward of a Swiss National and who is either under 21 years of age or dependent on the Swiss National.
Child of a Turkish worker	A person who is the natural, adopted or step-child or ward of a Turkish national who is ordinarily resident in the UK, Islands and is or was lawfully employed in the UK, provided the child is under 21 years of age or dependent on that Turkish national.
Close relative	A parent, step-parent, foster-parent, grandparent, step-grandparent, uncle, aunt, brother or sister.
Commercial accommodation	Accommodation whereby a commercial rental agreement is in place, which, whether a tenancy or a licence, imposes conditions upon the parties to the agreement that are enforceable at law.
Commissioner	The NHS organisation which has commissioned the course for which an NHS Bursary has been awarded or a person acting with the authority of such an institution in relation to the commissioning of the course.
Dependent	A person is dependent if they wholly or mainly financially rely on the other person for their day-to-day needs. But a person is not dependent if they are wholly or mainly supported by state benefits.
Directive 2004/38	Directive 2004/38 of the European Parliament and of the Council of 29th April 2004 of the rights of citizens of the Union and their family members to move and reside freely in the territory of the Member States.

<b>Words and Phrases with Special Meanings</b>	<b>Special Meaning in These Rules</b>
EEA	The area comprised by the European Economic Area states, which includes the member states of the EU, plus Iceland, Norway (including Svalbard) and Lichtenstein.
EEA frontier self-employed person	An EEA national who is a self-employed person in the UK and resides in Switzerland or the territory of an EEA state other than the UK and returns to his or her residence in Switzerland or that EEA state, as the case may be, daily or at least once a week.
EEA frontier worker	An EEA national who is a worker in the UK but resides in Switzerland or an EEA state other than the UK and returns to his or her residence in Switzerland or that EEA state, as the case may be, daily or at least once a week.
EEA migrant worker	An EEA national who is a worker, other than an EEA frontier worker, in the UK.
EEA national	A national of an EEA State other than the UK.
EEA self-employed person	An EEA national who is a self-employed person, other than an EEA frontier self-employed person, in the UK.
Eligible week	An eligible week consists of any educational time spent in attendance on the course at an academic authority or on a clinical placement.
EU	The European Union, which includes Austria, Belgium, Bulgaria, Croatia, Cyprus, The Czech Republic, Denmark (but not Greenland or the Faroe Islands), Estonia, Finland (including the Aland Islands), France (including the departments d'outre Mer of Guadeloupe, Martinique, French Guyana and Reunion, but not including the Territoires d' Outre Mer or Monaco) , Germany (including Heligoland), Greece, Hungary, Ireland, Italy (but not San Marino or the Vatican), Latvia, Lithuania, Luxembourg, Malta, The Netherlands, Poland, Portugal (including Madeira and the Azores but not Macau), Romania, Slovakia, Slovenia, Spain (including the Balearics, the Canaries, Ceuta and Melilla but not Andorra), Sweden and the United Kingdom (including Gibraltar but not the Channel Islands, the Isle of Man, the Sovereign Base areas of Cyprus, and the British Overseas Territories).
EU national	A national of a Member State of the EU. All citizens of the British Overseas Territories, except those residing at Britain's Sovereign Bases in Cyprus, are citizens of the European Union.

<b>Words and Phrases with Special Meanings</b>	<b>Special Meaning in These Rules</b>
Family member	<p>(a) In relation to an EEA frontier worker, an EEA migrant worker, an EEA frontier self-employed person, or an EEA self-employed person:</p> <ul style="list-style-type: none"> <li>(i) that person’s spouse or civil partner, or</li> <li>(ii) direct descendants of the person or of the person’s spouse or civil partner who are: <ul style="list-style-type: none"> <li>(aa) under the age of 21, or</li> <li>(bb) dependents of the person or the person’s spouse or civil partner; or</li> <li>(cc) dependent direct relatives in the ascending line of that person or of the person’s spouse or civil partner.</li> </ul> </li> </ul> <p>(b) In relation to a Swiss employed person, a Swiss frontier employed person, a Swiss frontier self-employed person or a Swiss self-employed person:</p> <ul style="list-style-type: none"> <li>(i) that person’s spouse or civil partner, or</li> <li>(ii) that person’s child or the child of that person’s spouse or civil partner.</li> </ul> <p>(c) In relation to an EU national who falls within article 7(1)(c) of Directive 2004/38:</p> <ul style="list-style-type: none"> <li>(i) that person’s spouse or civil partner; or,</li> <li>(ii) direct descendants of the person or of the person’s spouse or civil partner who are: <ul style="list-style-type: none"> <li>(aa) under the age of 21, or</li> <li>(bb) dependants of the person or the person’s spouse or civil partner.</li> </ul> </li> </ul> <p>(d) In relation to an EU national who falls within article 7(1)(b) of Directive 2004/38:</p> <ul style="list-style-type: none"> <li>(i) that person’s spouse or civil partner; or</li> <li>(ii) direct descendants of the person or of the person’s spouse or civil partner who are: <ul style="list-style-type: none"> <li>(aa) under 21, or</li> <li>(bb) dependants of the person or of the person’s spouse or civil partner; or</li> <li>(iii) dependent direct relatives in the person’s ascending line or that of the person’s spouse or civil partner.</li> </ul> </li> </ul> <p>(e) in relation to a UK national, for the purposes of category (o) in table 1(f) –</p> <ul style="list-style-type: none"> <li>i) the person’s spouse or civil partner; or</li> <li>ii) direct descendants of the person or the person’s spouse or civil partner who are – <ul style="list-style-type: none"> <li>aa) under the age of 21; or</li> <li>bb) dependants of the person or the person’s spouse or civil partner</li> </ul> </li> </ul>
Fees only bursary	A bursary which only includes help with tuition fees.

<b>Words and Phrases with Special Meanings</b>	<b>Special Meaning in These Rules</b>
Full bursary	A bursary which includes eligibility for a maintenance award.
Full-time	In relation to an eligible course, a course in which the student is required to attend the course for at least 30 weeks in each academic year except the final year of multi-year courses, and at least 8 weeks in the final academic year of multi-year courses; and to undertake in each academic year an average of at least 21 hours a week in study or practice placement or other work experience required by the course. In relation to a student, a student attending such a course.
Funding body	The NHS organisation which provides the funding for the course for which an NHS Bursary has been awarded
Healthcare profession	A healthcare profession for the purpose of these rules is one of the professions listed in section 3, tables 2(a) to (c).
Health Education England	The national leadership organisation for education, training and workforce development in the health sector.
Income after tax	All income, including overseas income, after deduction of income tax and national insurance contributions or equivalent taxes overseas. Where the income is in a currency other than sterling, the sterling equivalent will be used in any calculations on the basis of the actual sum in sterling received by the student or, where this is not known, the amount in sterling which the income would purchase using the average rate for the year it is received.
Income before tax	All income, including overseas income, before deduction of tax or national insurance payments, including any sums exempt from tax. Where the income is in a currency other than sterling, the sterling equivalent will be used in any calculations on the basis of the actual sum in sterling received by the student or, where this is not known, the amount in sterling which the income would purchase using the average rate for the year it is received.
Independent student	A student who can demonstrate that he or she is independent of their parents under the rules in paragraph 5.18.
International course	A first-degree course provided by a publicly funded institution in England in conjunction with an overseas institution, where part of the course takes place abroad.
Irreconcilably estranged	The student has not communicated with either of his or her parents for a period of at least one year, or otherwise demonstrated to the satisfaction of the NHSBSA that he or she has no association with either parent and that this situation cannot reasonably be expected to change.
Islands	The Channel Islands and the Isle of Man.

<b>Words and Phrases with Special Meanings</b>	<b>Special Meaning in These Rules</b>
Leave application date	The date on which a person granted stateless leave made an application to remain in the United Kingdom as a stateless person under the immigration rules (within the meaning given in section 33(1) of the Immigration Act 1971).
Leave to enter or remain	An unexpired grant of leave to enter or remain in the UK given on behalf of the Secretary of State to a person recognised as a refugee or given humanitarian protection; or to a family member of a person granted recognition as a refugee or given humanitarian protection.
Local office of Health Education England	Local Offices of Health Education England are the designated offices that have responsibility for commissioning relevant pre- registration programmes at a range of higher education institutions within the remit of the Local Office.
London	The area comprising the City of London and the Metropolitan Police District as defined by section 76 of the Greater London Act 1963 prior to its substitution by section 323(1) of the Greater London Authority Act 1999.
Maintenance award	The collective term for that part of the NHS Bursary which is paid to a student to help support them while attending the course. The types of support provided, and the overall amount payable, will depend on the nature of the course and on the student's circumstances as set out in Section 5. But the types of support that may be included are a basic allowance, an extra week's allowance, a disabled students allowance, a dependants allowance, a childcare allowance or parents learning allowance and reimbursement of practice placement expenses.
Maternity award	The continued payment of an NHS Bursary during authorised absence on maternity leave.
NHS Bursary Scheme	The arrangements established by the Secretary of State to pay allowances to students under section 63(6) of the Health Services and Public Health Act 1968.
Non- commercial accommodation	Generally, where the student is staying with friends or relatives and/or in a room in a private house, where there is no formal tenancy or contract in place. Where there is, if this includes terms which are not legally enforceable or which the parties did not intend to be legally enforceable, this would be considered to be non-commercial.
Non-medical	Includes all NHS Bursary eligible professions listed in tables 2(a) to (c) apart from doctor or dentist
Normal accommodation	A student's primary accommodation during term time, whether at the parental home or away from the parental home.
OFSTED	The Office for Standards in Education, Children's Services and Skills

<b>Words and Phrases with Special Meanings</b>	<b>Special Meaning in These Rules</b>
Ordinarily resident	<p>Lawful and habitual residence through choice and for a settled purpose throughout the period concerned.</p> <p>A person is to be treated as ordinarily resident in the area in question if the person would have been so resident but for the fact that person, their spouse or civil partner, their parent, or (in the case of a dependent direct relative in the ascending line) their child or child's spouse or civil partner is or was temporarily employed outside the area in question.</p> <p>For the purposes of this definition, temporary employment includes: (a) in the case of members of the regular naval, military or air forces of the crown, any period in which they serve outside the UK as members of such forces; and</p> <p>(b) in the case of members of the regular armed forces of an EEA State or Switzerland, any period in which they serve outside the territory comprising the EEA and Switzerland as members of such forces; and</p> <p>(c) in the case of members of the regular armed forces of Turkey, any period in which they serve outside the territory comprising the EEA, Switzerland and Turkey as members of such forces.</p>
Parent/Parents	A parent or parents by nature or legal adoption. But not a guardian step-parent, or foster parent (unless they have legally adopted the student concerned).
Parental home	The home of a parent or guardian of the student or, for members of a religious order, a house belonging to that religious order.
Parental responsibility	Exists where a person has the same legal rights, duties, powers, responsibilities and authority as a parent for a child and for the child's property.
Partner	A person who is ordinarily living with the student as if they were the student's spouse or civil partner.
Part-time	In relation to a course, any course that does not satisfy the definition of a full-time course. In relation to a student, any student attending a course that does not satisfy the definition of a full-time course.
Period ordinarily required to complete the course	The period ordinarily required to complete the course by a student who is not excused part of the course on account of his or her having attended a previous course.

<b>Words and Phrases with Special Meanings</b>	<b>Special Meaning in These Rules</b>
Person granted humanitarian protection	A person who on the grounds of humanitarian protection has been granted leave to remain under the immigration rules as defined in s33 (1) of the Immigration Act 1971, whose leave to remain is extant, or in respect of whose leave to remain an appeal is pending within s104 of the Nationality, Immigration and Asylum Act 2002, and who has been ordinarily resident in the UK and Islands throughout the period since the person was granted such leave to remain.
Person granted stateless leave	A person who has extant leave to remain as a stateless person under the immigration rules within the meaning given in section 33(1) of the Immigration Act 1971(a) and who has been ordinarily resident in the United Kingdom and Islands throughout the period since being granted such leave.
Pre-registration student	A student on a course leading to professional registration who is not already registered in the same field of healthcare.
Private vehicle	Includes a pedal cycle or motor vehicle owned by the student or otherwise used by the student with the owner's consent, other than a hire vehicle and subject to the requirements in paragraph 7.5
Publicly funded student support	Any award bestowed, grant paid, or other support provided by virtue of the Education Act 1962 or the Teacher and Higher Education Act 1998 or any comparable award, grant, or other support paid out of moneys provided by any UK Parliament
Recognised Institution of Higher Education	Institution of higher education that is recognised by the Department of Health and Social Care and the NHS as offering a course for which an NHS Bursary may be payable.
Refugee	A person recognised by Her Majesty's government as a refugee within the meaning of the United Nations Convention relating to the status of refugees done at Geneva on 28th July 1951 as extended by the protocol thereto which entered force on 4th October 1967.
Residual income	For a parent is the amount determined in accordance with paragraph 5.11 in these rules, and for a spouse, civil partner or partner is the amount determined in accordance with paragraph 5.15 in these rules.
Right of permanent residence	A right arising under Directive 2004/38 to reside in the UK permanently without restriction.
Right of residence	A right of residence under article 7 of Directive 2004/38, or an equivalent right granted under the EEA Agreement or the Swiss agreement.

<b>Words and Phrases with Special Meanings</b>	<b>Special Meaning in These Rules</b>
Secondment	A secondment is where a student remains employed by an organisation but is relieved of his or her normal duties or is given leave of absence to enable them to attend the course.
Self-employed person	In relation to an EEA national, a person who is self-employed within the meaning of article 7 of Directive 2004/38 or the EEA agreement as the case may be. In relation to a Swiss national, a person who is self-employed within the meaning of annex 1 to the Swiss agreement.
Settled in the UK	Settled within the meaning of section 33(2A) of the Immigration Act 1971 – that is ordinarily resident in the UK without being subject under the immigration laws to any restriction on the period for which the person may remain in the UK. (This will apply to UK nationals born in the UK and who have always lived in the UK).
Settled in the UK and has exercised a right of residence elsewhere	A UK national, a family member of a UK national for the purposes of article 7 of Directive 2004/38 (or corresponding purposes under the EEA agreement or Swiss agreement), or a person who has a right of permanent residence, who has exercised a right under Article 7 of Directive 2004/38 or any equivalent right under the EEA Agreement or Swiss agreement in a State other than the UK, or, in the case of a person who is settled in the UK and has a right of permanent residence, if the person goes to the state within the territory comprising the EEA and Switzerland of which the person is a national or of which the person in relation to whom the person is a family member is a national.
Single parent	A person with parental responsibility for a child who does not ordinarily live with a spouse or civil partner or partner.
Special educational needs	A child or young person has special educational needs within the meaning of the Children and Families Act 2014 if he or she has a learning difficulty or disability which calls for special educational provision to be made for him or her.
Sponsorship income	Any scholarship, studentship, exhibition, award, grant, allowance or benefit however described, payable in connection with the student's attendance on the course, or any earnings from employment in respect of any period in which the student has leave of absence for the purpose of attending the course.
State authority	A State authority or Agency whether national, regional or local.
State studentship	Funding provided by the State to support a postgraduate student undertaking research as well as study - normally arranged through various UK research councils.
Student loan	A loan made under the Student loan scheme.



<b>Words and Phrases with Special Meanings</b>	<b>Special Meaning in These Rules</b>
Student loan scheme	The scheme introduced by the Education (Student loans) Act 1990 by which government supported loans are made available to students, and which is administered by the Student loans Company.
Swiss agreement	The agreement between the EU and its member states, of the one part, and the Swiss Confederation, of the other, on the Free Movement of Persons signed at Luxembourg on 21 June 1999 and which came into force on 1 June 2002.
Swiss employed person	A Swiss national who is an employed person other than a Swiss frontier employed person, in the UK.
Swiss frontier employed person	A Swiss national who is an employed person in the UK; and resides in Switzerland or in the territory of an EEA state other than the UK and returns to the national's residence in Switzerland or that EEA State as the case may be, daily or at least once a week.
Swiss frontier self-employed person	A Swiss national who is a self-employed person in the UK and resides in Switzerland or in the territory of an EEA State, other than the UK, and returns to the national's residence in Switzerland or that EEA state, as the case may be daily or at least once a week.
Swiss self-employed person	A Swiss national who is a self-employed person other than a Swiss frontier self-employed person, in the UK
Temporary accommodation	Secondary accommodation taken by a student for the purposes of attending a compulsory practice placement which forms part of his or her course, where it is not practical for the student to travel to the placement site from their normal accommodation on a daily basis.
Turkish worker	A Turkish national who is ordinarily resident in the UK and Islands and is, or has been, lawfully employed in the UK.
UK	The United Kingdom of Great Britain and Northern Ireland, comprising England, Scotland, Wales and Northern Ireland but not the Islands.
UK nationals	British citizens, persons who are British subjects by virtue of Part IV of the British Nationality Act 1981, and who have the right of abode in the UK and are therefore exempt from UK immigration control, and British Overseas Territories citizens who acquire their citizenship from a connection with Gibraltar.
UK tax year	A UK tax year begins on 6th April and runs for a 12-month period.
Worker	Means a person who is a worker within the meaning of Article 7 of Directive 2004/38 and who is not removed from the definition of "qualified person" in regulation 6 of the immigration (EEA) Regulations 2006 by the Accession (Immigration and Worker Authorisation) Regulations 2006 or a worker within the meaning of the EEA agreement or Swiss agreement as the case may be.

## 15. Appendix I: Summary of Changes

15.1 The NHS Bursary Scheme New Rules is the ninth edition of the new rules. The rules are applicable for the academic year 1 August 2020 to 31 July 2021. They include a number of changes from the eighth edition of the NHS Bursary Scheme Rules published in 2019.

15.2 In section 1, paragraphs 1.1 (b) to (d), the word 'Continuing' has been added in terms of non-medical students to reflect the fact that NHS Bursary funding is not available to new students. An Equality Impact Assessment was carried out in 2016 when the Education Funding reforms for nursing, midwifery and allied health profession students was announced and implemented. This change provides clarity on the fact that the bursary is available to those students who started courses before the 2017 Education Funding reforms were implemented.

15.3 In section 2, the title heading 'Deferrals' has been changed to 'Temporary Withdrawal'. This is to make it clearer for students who step off NHS-Bursary eligible courses that they may still be eligible to apply for the bursary on their return to the programme.

15.4 In section 2, paragraph 2.3 has been amended to reflect Health Education England provisions concerning students who temporarily step off an NHS Bursary-eligible programme.

15.5 In section 6, paragraph 6.4, reference to the Disabled Students Allowances Quality Assurance Group (DSA-QAG) has been removed and replaced with the Department for Education to reflect the closure of this organisation from December 2019 in line with DfE planned changes to Non-Medical Help provision, quality assurance and registration from 2020/21. This reflects the organisational change only and has no impact on students' access to services.

15.6 In section 7, paragraphs 7.10 – 7.12 have been added to provide clarification around the block booking of placement accommodation on students' behalf by higher education institutions.

15.7 Section 8, paragraph 8.8b (ii) has been amended to provide further clarification on special educational needs. A corresponding Glossary definition has also been added. There is no change to the meaning of the rule within this paragraph.

15.8 In section 8, paragraph 8.9e (ii), reference to 'The Care Inspectorate Scotland' has been removed and replaced with 'Social Care and Social Work Improvement Scotland (SCSWIS)' to reflect the change of name only.

15.9 Section 8, paragraph 8.10(a) has been corrected to refer to the 'child element of Universal Credit'.

15.10 In section 9, paragraph 9.11, reference to a student transferring in the first academic year of their course has been removed to provide clarification that students can continue on a bursary for a further 12 months, where applicable.

15.11 The first two rows of Table 17 in section 11 which provided exceptions to students not already being registered in the same field of healthcare have been removed

15.12 In section 11, Table 17, a new exception has been added regarding medical and dental students who have previously received student finance as independent students.

15.13 In the Glossary at section 14, the entry for DSA-QAG has been deleted.

15.14 A number of other minor and inconsequential changes have been made throughout the rest of the text compared to the earlier published rules.

## 16. Appendix II: Organisations that maybe able to help

NHS Bursary Enquiries:

England:

NHSBSA Student Services  
Hesketh House  
200-220 Broadway  
Fleetwood  
FY7 8SS

Tel: 0300 330 1345

Website [www.nhsbsa.nhs.uk/student-services](http://www.nhsbsa.nhs.uk/student-services)

Wales:

NHS Wales Student Awards Services  
Floor 4  
Companies House  
Crown Way Cardiff CF14 3UB

Tel: 029 2090 5380

Website: [www.nwssp.wales.nhs.uk/student-awards](http://www.nwssp.wales.nhs.uk/student-awards)

Scotland:

The Student Awards Agency for Scotland  
Saughton House Broomhouse Drive EDINBURGH EH11 3UT

Tel: 0300 555 0505

Website: [www.saas.gov.uk](http://www.saas.gov.uk)

Northern Ireland:

Website: [www.nidirect.gov.uk](http://www.nidirect.gov.uk)

Student Finance England

Telephone: 0845 300 5090

Textphone: 0845 604 4434

Website: [www.gov.uk/contact-student-finance-england](http://www.gov.uk/contact-student-finance-england)

**Independent Organisations Representing Health Professions:**

Allied Health Professionals Federation

Tel: 0207 378 3022

Website: [www.ahpf.org.uk](http://www.ahpf.org.uk)

British and Irish Orthoptic Society

Tel: 0121 728 5633

Website: [www.orthoptics.org.uk/](http://www.orthoptics.org.uk/)

British Association of Dental Therapists

Tel: 0161 665 5878

Website: [www.badt.org.uk/](http://www.badt.org.uk/)

Royal College of Occupational Therapists

Tel: 0207 357 6480

Website: [www.rcot.co.uk](http://www.rcot.co.uk)

British Association of Prosthetists and Orthotists

Tel: 0141 561 7217

Website: [www.bapo.com](http://www.bapo.com)

British Dental Association

Tel: 0207 935 0875

Website: [www.bda.org](http://www.bda.org)

British Dietetic Association

Tel: 0121 200 8080 (Members only) Website: [www.bda.uk.com](http://www.bda.uk.com)

British Medical Association

Tel: 0300 123 1233 (Members Only) Website: [www.bma.org.uk](http://www.bma.org.uk)

British Society of Dental Hygiene and Therapy (formerly the BDHA)

Tel: 01788 575050  
Website: [www.bsdht.org.uk](http://www.bsdht.org.uk)

**Chartered Society of Physiotherapy**

Tel: 020 7306 6666  
Website: [www.csp.org.uk](http://www.csp.org.uk)

**College of Operating Department Practitioners**

Tel: 0870 746 0984  
Website: [www.unison.org.uk/at-work/health-care/representing-you/unison-partnerships/codp/](http://www.unison.org.uk/at-work/health-care/representing-you/unison-partnerships/codp/)

**General Dental Council**

Tel: 020 7167 6000  
Website: [www.gdc-uk.org](http://www.gdc-uk.org)

**General Medical Council**

Website: [www.gmc-uk.org](http://www.gmc-uk.org)

**Health and Care Professions Council**

Website: [www.hcpc-uk.org](http://www.hcpc-uk.org)

**Nursing and Midwifery Council**

Tel: 020 7637 7181  
Website: [www.nmc.org.uk](http://www.nmc.org.uk)

**Royal College of Midwives**

Tel: 0300 303 0444  
Website: [www.rcm.org.uk](http://www.rcm.org.uk)

**Royal College of Nursing**

Tel: 0207 409 3333  
Website: [www.rcn.org.uk](http://www.rcn.org.uk)

Royal College of Speech and Language Therapists

Tel: 020 7378 3012 (General enquiries) Website: [www.rcslt.org](http://www.rcslt.org)

The College of Podiatry

Tel: 020 7234 8620

Website: [www.cop.org.uk](http://www.cop.org.uk)

The Society of Radiographers

Tel: 020 7740 7200

Website: [www.sor.org](http://www.sor.org)

UNISON

Tel: 0800 0857 857

Website: [www.unison.org.uk/at-work/health-care/representing-you/unison-partnerships/codp/](http://www.unison.org.uk/at-work/health-care/representing-you/unison-partnerships/codp/)

National Union of Students

Tel: 0300 303 8602

Website: [www.nus.org.uk](http://www.nus.org.uk)

## **17. Appendix III Guidance on Maternity, Adoption and Associated Awards**

### **Students who Become Pregnant**

17.1 If a student becomes pregnant after she has started her course, she should let her tutor know as soon as possible and provide the academic authority with information concerning the baby's estimated date of arrival. This is important because the academic authority will need to make provision for the student's antenatal needs prior to her period of maternity leave and to assess the health and safety risks of her undertaking any scheduled placements during that time.

### **Arranging for Maternity Leave**

17.2 It is for the student and the academic authority to agree when her authorised absence for maternity leave should begin, taking into account her own health and the health of her baby, and the point in the course when it would be best to begin the break.

17.3 The student should provide the academic authority with confirmation of the pregnancy before commencing maternity leave (usually the official form MAT B1 available from her GP or midwife after she has been pregnant for 20 weeks).

### **How to Apply for Maternity awards and Additional Benefits**

17.4 To apply for an award, students and their tutors will need to complete form BUR101W (MAT) for the academic authority to submit to the NHSBSA. The form must be completed by both the academic authority and the student and the student given a copy of the completed form. The form should give an estimated return date to ensure payment of the award during the period of leave, but the date may be re-negotiated between the student and the academic authority at a later stage.

17.5 A student on maternity leave should also inform the NHSBSA of the birth of her child as she may be entitled to additional allowances as a result. Further information on these allowances and the relevant application forms can be found on the NHSBSA website.



17.6 The student should also contact the academic authority to confirm when she will be returning to her course. If she fails to do this, she will receive a letter from the academic authority confirming the return date as originally given on form BUR101W (MAT) and the bursary administrators will stop making bursary payments on that day.

## **Students Returning to the Course after Giving Birth**

17.7 Students on maternity leave are encouraged to take at least 12 weeks paid absence before returning to their training after giving birth and must not return to the course for at least two weeks after giving birth.

## **Students Who Wish to Defer their Return to Training**

17.8 Students on maternity leave who wish to extend the period of absence beyond that originally agreed with the academic authority will need to request an extension and specify a reason for it. Any student wishing to do this must contact the academic authority, and a member of staff (usually a tutor) will then meet with the student at the academic authority (or, in the case of difficult circumstances, at the student's home) to fill out a further BUR101W (MAT) form.

## **Additional Factors to Consider When Arranging Maternity Leave**

17.9 Students should check whether it is a requirement of the course or relevant professional bodies that they complete their training within a set period of time so that they can take this information into account when arranging, or requesting to extend, a period of maternity leave with their academic authority.

17.10 Students should not assume that the NHS Bursary rules concerning Maternity awards will still be in force when planning for subsequent academic years as they may be subject to change in the future. Further information concerning any updates or changes to the current rules will be posted on the NHSBSA website.

## **Arranging for Maternity (Paternity) Support Leave**

17.11 Students who are about to become biological fathers, adoptive fathers or nominated carers of a new-born or newly-adopted child, or whose spouse, civil partner or partner is scheduled to give birth to a child, should provide the academic authority with some form of confirmation of the impending birth or arrival of the child such as a copy of

form MAT B1, or, in the case of adoption, the relevant documents issued by the adoption agency.

17.12 It is for the student and the academic authority to agree when his or her four weeks of authorised absence for maternity support leave should begin and end, and whether it will be taken as one period of absence or split severally. Students will need to arrange time-off for antenatal appointments separately with the academic authority and this will not affect their ordinary bursary payments.

17.13 A full bursary student applying for a maternity support award will need to sign a declaration to be sent to his or her course tutor (see also item 9.17 of the NHS Bursary Rules) in order for to be able to receive a maternity support award and for the continuation of the maintenance award when they return to the course.

17.14 The academic authority should also send the NHSBSA the completed form BUR101W (MAT) when the student goes on leave.

## **Extending Bursary Payments after Taking Maternity Support Leave**

17.15 It is expected that students receiving a maternity support award may need to extend maintenance payments of their NHS Bursary after their return to training for up to four weeks at the end of the academic year, depending on the length of time that they have been absent from the course. This extension payment will be paid in one sum regardless of whether the student's period of authorised leave has been taken in one go or split. However, students may not need an extension payment if they have caught up with their training by the end of the academic year or the end of the course.

17.16 Academic authorities should send a completed NHS Bursaries form BUR102 if the student receives extended payments of his or her maintenance award as a result of taking maternity support leave.

## **Additional Factors to Consider When Arranging Maternity Support Leave**

17.17 Students requiring maternity support leave should check whether it is a requirement of the course or relevant professional bodies that they complete their training within a set period of time so that they can take this information into account when arranging periods of leave with their academic authority.

17.18 Students should not assume that these NHS Bursary rules concerning maternity support leave will still be in force when planning for subsequent academic years as they may be subject to change in the future. Further information concerning any updates or changes to the current rules will be posted on the NHSBSA website.

## **Arranging for Adoption Support Leave**

17.19 Students who have already started their training should inform tutors that they will be adopting children at the earliest opportunity. This is important as the academic authority will need to arrange for such students to take time-off in order to attend official meetings as part of the usual proceedings for adoption.

17.20 Students should inform their tutors of the week that the child or children will be placed with them and when they would like to start and end their period of leave. They should also provide the academic authority with confirmation of the impending adoption from the relevant adoption agency before beginning their leave period. This could take the form of official documents specifying:

- (a) the name and address of the agency;
- (b) the name and date of birth of the child/children;
- (c) the date on which the student received notice that he/she had been matched with the child/children;
- (d) the date on which the agency expects the child/children to be placed with the student;
- (e) any other relevant confirmation from the adoption agency.

17.21 The student and the academic authority should discuss when the period of authorised absence for adoption support leave should begin. The final decision as to when the leave should be taken rests with the academic authority.

## **How to Apply for an Adoption Support Award**

17.22 To apply for an award, students and their tutors will need to complete form BUR101W (MAT) for the academic authority to submit to the NHSBSA. The form must be completed by both the academic authority and the student and the student given a copy of the completed form.

17.23 The form should give an estimated return date to ensure payment of the award during the period of leave, but the date may be re-negotiated between the student and the academic authority at a later stage.

17.24 Students on Adoption Support Leave should also inform the NHSBSA when their adopted children are placed in their care as they may be entitled to additional allowances as a result. Further information on these allowances and the relevant application forms can be found on the NHSBSA website.

17.25 Students on adoption support leave are responsible for maintaining contact with the academic authority while they are on adoption support leave and they should contact the academic authority to confirm when they will be returning to their courses. If they fail to do this, they will receive a letter from the academic authority confirming the return date as originally given on form BUR101W (MAT) and the NHSBSA will stop making bursary payments on that day.

## **Additional Factors to Consider**

17.26 Students should check whether it is a requirement of the course or relevant professional bodies that they complete their training within a set period of time so that they can take this information into account when arranging, or requesting to extend, a period of adoption support leave with their academic authority.

17.27 Students should not assume that these NHS Bursary rules concerning adoption support awards will still be in force when planning for subsequent academic years as they may be subject to change in the future. Further information concerning any updates or changes to the current rules will be posted on the NHSBSA website.

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