



PTMNN

Notes to help you complete your application
for student finance

2021/22

You can also apply online at www.gov.uk/studentfinance

This notes booklet will help you answer the questions on the application form. It will also advise you of the evidence you will need to supply to allow us to fully assess your entitlement to student finance, and whether it needs to be photocopies or originals.

It can take up to 20 working days to process your original identity evidence. If you require the use of your original identification documents within 20 working days of us receiving it, please submit your document to us after you have used it.

Who should complete the application form?

A student starting one of the following course types on or after 1 August 2018:

- a part-time course of higher education.
- a part-time Initial Teacher Training (ITT) course.

If you are not studying one of these courses do not complete this form.

Don't complete the form if you normally live in Wales, Scotland, Northern Ireland, the Channel Islands or the Isle of Man, but you have moved or will be moving to England to undertake this course or a previous course which you were undertaking just before this course. If this is the case, you should contact whichever of the following organisations is relevant:

- Student Finance Wales (SFW)
- The Student Awards Agency Scotland (SAAS)
- The Education Authority of Northern Ireland (EA)
- The Education Department of Guernsey or Jersey
- The Education Department for the Isle of Man

Where can I find more information about student finance?

You can find out more about all aspects of student finance at www.gov.uk/studentfinance

Alternative formats

You can order forms and guides in Braille, large print or audio by emailing with your name, address, Customer Reference Number along with what form and format you require to: brailleandlargefonts@slc.co.uk or you can telephone us on **0141 243 3686**.

Please note, the above email address and telephone number can only deal with requests for alternative formats of forms and guides.

How can I contact you?

Visit www.gov.uk/studentfinance

Call us on **0300 100 0607**

Available student finance

Disabled Students' Allowance (DSA)

You can find out more about DSA at www.gov.uk/studentfinance

DSA can help pay for the extra course-related costs you may have as a result of your disability, including a long-term health condition, mental health condition or specific learning difficulty. This includes specialist equipment, a non-medical helper or special travel arrangements.

If you only want to apply for DSA, and not any other loans or grants, you should complete a DSA1 form instead of this one. You can download a DSA1 application form at www.gov.uk/studentfinance

Section 1

Personal details

Nationality

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

National Insurance number

If you do not provide your National Insurance number, payment of your loan(s) will be withheld and you will have to fund your own tuition fees and living costs until you have resolved this issue.

You will find your National Insurance number on any of the following:

- your National Insurance number card or letter.
- a payslip.
- an Income Tax document such as a P45 or P60.

If you have never been given a National Insurance number, you should leave the box blank. You will be contacted if you need to take any action to obtain a National Insurance number.

Identity evidence details

b1& If your UK passport has expired you must send your original UK birth or adoption certificate.

b2 If you don't hold a UK passport, you must send your original non-UK passport or Biometric Residence Permit.

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

If you provide a share code in Section 3, we will use this to confirm your identity with the Home Office. When you give us your share code you do not need to send identity evidence.

Contact details

- c** If you provide a term-time correspondence address all correspondence we issue will be sent to that address from the date you move there. Any original evidence you send will be returned to your home address unless you specify otherwise.

Evidence **e**

	Evidence of	Evidence item required
b1& b2	Identity	<ul style="list-style-type: none">• original non-UK passport, or• original Biometric Residence Permit, or• original UK birth or adoption certificate. <p>We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.</p>
b1& b2	Name change Required if your name has changed from that which appears on your birth certificate or passport.	A photocopy of: <ul style="list-style-type: none">• Change of name deed, or• Marriage/divorce certificate, or• Civil partnership/dissolution certificate.

Section 1

Personal details

Evidence **e**

	Evidence of	Evidence item required
d	Date of marriage or civil partnership if you will be under 25 at the start of the academic year	A photocopy of: <ul style="list-style-type: none">• Marriage certificate, or• Civil partnership documentation.
d	Separated, divorced or dissolved civil partnership	A photocopy of: <ul style="list-style-type: none">• Decree absolute, or• Dissolution order, or• a letter from your solicitor confirming your status.
d	Widowed or surviving civil partner	<ul style="list-style-type: none">• a certified copy of the death certificate.

Section 2

Previous support and qualification history

Previous study

- c** This includes any undergraduate or postgraduate course you have attended whether it was in the UK or overseas. Examples of undergraduate higher education courses you should tell us about include:
- DipHE, Cert HE, HNC, HND and Foundation Degree, and similar courses from outside the UK.
 - Integrated Masters Degrees.
 - PgDip, MA, MSc, MBA or equivalents.
- If you're unsure of the level of your existing qualification, contact the university or college where you completed the course, they may be able to help.
- e2** Mention any course where you were eligible to apply for funding from Student Finance England, Student Finance Wales, Student Awards Agency for Scotland (SAAS) or Student Finance Northern Ireland even if:
- you didn't receive any funding, or
 - you chose not to take the funding available.
- f** You can find the level of any qualifications you have achieved on the certificate you were given. If you are unsure of the level of a qualification you should contact the university or college you attended.

a1 UK national

You are a UK national if you have a UK passport or are eligible to apply for one.

If you have provided your UK passport details in section 1, you do not need to send any further evidence of your UK nationality.

Armed forces

If you, your parents or partner are members of the armed forces, you must apply for student finance in the UK country where you were ordinarily resident when you/they enlisted, unless you are permanently living in another area of the UK.

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

a2 Irish citizen

If you hold a UK passport, you should provide your passport details in section 1 as you do not need to send further evidence of your nationality.

a3 Family member of a UK national

By family member, you must be the:

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

of a UK national.

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

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

To prove your immigration status, you need to provide us with a share code. Go to **www.gov.uk/view-prove-immigration-status** to generate the code. Once generated, the code will expire after 30 days. You should return your application form within 10 days of generating the share code.

We will use your share code to confirm your identity with the Home Office. When you give us your share code you do not need to send identity evidence.

a5 Child of a Swiss national

To get student finance as a child of a Swiss national, your parent or step-parent must have settled or pre-settled status through the EU Settlement Scheme, and be resident in the UK on the first day of the first academic year. You must have pre-settled status and be ordinarily resident in the UK, Gibraltar, the EEA or Switzerland for three years prior to the first day of your first academic year.

Go to the residency status section on page 8 to find out when your academic year starts.

To prove your immigration status, you need to provide us with a share code. To prove your parent or step-parent's immigration status, you need to provide us with their date of birth and share code. Go to **www.gov.uk/view-prove-immigration-status** to generate the codes. Once generated, the codes will expire after 30 days. You should return the application form within 10 days of generating the share codes.

We will use your share code to confirm your identity with the Home Office. When you give us your share code you do not need to send identity evidence unless it is required as proof of relationship. We will still need identity evidence from your parent or step-parent.

a6 EEA or Swiss worker

By family member, you must be the:

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

of the EEA or Swiss national.

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

To prove your immigration status, you need to provide us with a share code. To prove your family member's immigration status, you need to provide us with their date of birth and share code. Go to www.gov.uk/view-prove-immigration-status to generate the codes. Once generated, the codes will expire after 30 days. You should return your application form within 10 days of generating the share codes.

We will use your share code to confirm your identity with the Home Office. When you give us your share code you do not need to send identity evidence unless it is required as proof of relationship. We will still need identity evidence from your family member.

You do not need to provide a share code if you:

- are an Irish citizen; or
- have a Frontier Worker Permit.

Your family member does not need to provide a share code if they have a Frontier Worker Permit.

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

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

a7 Child of a Turkish worker

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

a8 'Settled status'

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

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

- You are a British citizen.
- You have been granted 'Indefinite Leave to Remain'.
- You have a right of abode in the UK.

Further information about immigration issues can be obtained from the Home Office.

If you have been granted 'Indefinite Leave to Remain' in the UK as a victim of domestic violence or abuse, provide details at question a12.

a9 Refugee status

If you or your:

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

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

If you are claiming student finance as the child or step-child of a refugee, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming student finance as the husband, wife or civil partner of a refugee, you must have been their husband, wife or civil partner at the time of their application for asylum.

Expiry date

If you or your

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

were granted refugee status without an expiry date you should mark the expiry date box as N/A (not applicable).

a10 Humanitarian Protection

If you or your:

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

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

If you are claiming student finance as the dependent child or step-child of a person granted Humanitarian Protection, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming student finance as the husband, wife or civil partner of someone who has been granted Humanitarian Protection, you must have been their husband, wife or civil partner at the time of their application for asylum.

a11 Stateless Person

If you or your:

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

have been granted 'Leave to Remain' as a Stateless Person in the UK, you or they, will have received a letter and an immigration status document from the UK Home Office confirming this.

If you are claiming student finance as the child or step-child of a person granted 'Leave to Remain' as a Stateless Person, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the UK Home Office.

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

a12 Victim of domestic violence or abuse

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

a13 Section 67 of the Immigration Act 2016

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

If you are claiming student finance as the dependent child or step-child of a person granted 'Leave to Remain' under section 67 of the Immigration Act 2016, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

a14 Calais leave

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

If you are claiming student finance as the dependent child or step-child of a person granted Calais leave, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

a15 Bereaved partner

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

a16 Long residency

&17 To be eligible for support under the long residence category you must have lawful ordinary residence in the UK for the three year period before the first day of the first academic year of your course and must be resident in England. This means you must have held a form of Leave to Remain issued by the Home Office for the whole of the three year period before the first day of the first academic year of your course.

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

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



If you answered 'No' to all the questions in this section, you are not eligible for student finance from Student Finance England. You may still be able to get Tuition Fee only funding if for example, you are an EU/EEA national or an Irish citizen. For more information on Fee Support only funding go to www.gov.uk/studentfinance

b2 Residency status

&3 If you have refugee status you should provide your address details from the point your status was granted or up to a maximum of three years if your status was granted prior to that point.

If you have been granted:

- 'Indefinite Leave to Remain' as the victim of domestic violence or abuse;
- 'Indefinite Leave to Remain' as a person who has been a bereaved partner;
- 'Leave to Remain' in the UK under section 67 of the Immigration Act 2016;
- Calais leave in the UK;
- Humanitarian Protection; **or**
- 'Leave to Remain' in the UK as a Stateless Person

only provide your address history from the date your Home Office status was granted, up to a maximum of 3 years before the first day of the first academic year of your course.

Date study begins between

1 August until 31 December inclusive
1 January until 31 March inclusive
1 April until 30 June inclusive
1 July until 31 July inclusive

Date academic year begins

1 September
1 January
1 April
1 July

Section 3

Residence – continued

Evidence **e**

Check the table below to make sure you send us the correct evidence about your nationality and residency. Please note that we may contact you at a later date if we need any further information or evidence to confirm what you've told us in your application.

If we find that any of the information or evidence you provide is false or incorrect you may not receive financial support, any support you have received may be withdrawn and you could be prosecuted.

Question	Evidence of	Original evidence item required
a1	UK nationality	If you were born outside the UK and have a British birth certificate issued by a British Consulate, send this instead of your passport, a letter or other document.
a2	Irish citizenship	Your ROI passport or national identity card.
a3	Family member of a UK national	<ul style="list-style-type: none"> Your family member's passport; and Proof of your relationship with your UK national family member. This may be: <ul style="list-style-type: none"> your marriage or civil partnership certificate; or a birth certificate showing your name and the UK national's name; and the marriage or civil partnership certificate if you or the UK national are a step-parent or step-child.
a5	Parent/step-parent's Swiss nationality and your relationship to them	<ul style="list-style-type: none"> Your parent or step-parent's passport or national identity card (confirming their Swiss nationality); and Your birth certificate or equivalent.
a5	Residency of Swiss national parent/step-parent	<ul style="list-style-type: none"> A letter signed by your parent to confirm they are/were living in the UK on the first day of your academic year; and Bank statement; or Payslip (showing home address); or Tenancy agreement/Mortgage statement; or Recent utility bill; or Local Authority correspondence; or Government department correspondence.
a6	EEA or Swiss nationality	<ul style="list-style-type: none"> Your family member's passport or national identity card.
a6	Employment of the EEA or Swiss national who is working, has worked or is looking for work in the UK	<ul style="list-style-type: none"> P60 or letter from employer; or Audited accounts, tax returns or details of income if self-employed; or Letter from employer confirming intention to continue working while studying; or P45, P60 or letter from previous employer if currently looking for work or previously worked in the UK.
a7	The child of a Turkish worker	<ul style="list-style-type: none"> A Home Office letter and an immigration status document, normally a passport or Biometric Residence Permit; and Your parent's passport or national identity card. <p>We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.</p>

Section 3

Residence – continued

Question	Evidence of	Original evidence item required
a7	Turkish worker's employment in the UK	<ul style="list-style-type: none"> Your parent's contract of employment as proof of their employment in the UK.
a8	'Settled status'	<ul style="list-style-type: none"> Confirmation of your immigration status. For example, your UK passport, Biometric Residence Permit or Home Office letter. <p>We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.</p>
a9	Refugee status	<ul style="list-style-type: none"> A Home Office letter and an immigration status document, normally a passport or Biometric Residence Permit. <p>We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.</p>
a9	Relationship to person holding Refugee status if it is not you	<ul style="list-style-type: none"> Proof of your relationship to the person who has been granted refugee status.
a10	Humanitarian Protection	<ul style="list-style-type: none"> A Home Office letter and an immigration status document, normally a passport or Biometric Residence Permit. <p>We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.</p>
a10	Relationship to person holding Humanitarian Protection status if it is not you	<ul style="list-style-type: none"> Proof of your relationship to the person who has been granted Humanitarian Protection status.
a11	Stateless Person	<ul style="list-style-type: none"> A Home Office letter and an immigration status document, normally a passport or Biometric Residence Permit. <p>We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.</p>
a11	Relationship to person holding Stateless Person status if it is not you	<ul style="list-style-type: none"> Proof of your relationship to the person who has been granted Stateless Person status.
a12	Indefinite Leave to Remain in the UK as the victim of domestic violence or abuse	<ul style="list-style-type: none"> A Home Office letter and an immigration status document, normally a passport or Biometric Residence Permit. <p>We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.</p>
a13	Leave to Remain in the UK under section 67 of the Immigration Act 2016	<ul style="list-style-type: none"> A Home Office letter and an immigration status document, normally a passport or Biometric Residence Permit. <p>We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.</p>
a13	Relationship to person holding this status if it is not you	<ul style="list-style-type: none"> Proof of your relationship to the person who has been granted 'Leave to Remain' under section 67 of the Immigration Act 2016.

Question	Evidence of	Original evidence item required
a14	Calais leave in the UK	<ul style="list-style-type: none"> • A Home Office letter and an immigration status document, normally a passport or Biometric Residence Permit. <p>We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.</p>
a14	Relationship to person holding this status if it is not you	<ul style="list-style-type: none"> • Proof of your relationship to the person who has been granted this status.
a15	Indefinite Leave to Remain in the UK as a bereaved partner	<ul style="list-style-type: none"> • A Home Office letter and an immigration status document, normally a passport or Biometric Residence Permit. <p>We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.</p>
a16 &17	Immigration status in the UK	<ul style="list-style-type: none"> • A Home Office letter and an immigration status document, normally a passport or Biometric Residence Permit. <p>We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.</p>
a16 &17	<p>If on the first day of the first academic year you'll be:</p> <ul style="list-style-type: none"> • under 18 and have lived in the UK and Islands for at least seven years <p>or</p> <ul style="list-style-type: none"> • 18 or above and have lived in the UK and Islands for at least half of your life or 20 years 	<p>School letter and records on headed paper, signed by the Deputy Head or Head Teacher within the school. The letter and records should confirm dates you were in attendance at the school.</p> <ul style="list-style-type: none"> • Letter from a GP. • Confirmation of university/college attendance. • Council tax bill. • Payslips/P60/P45/self-assessed tax return. • Confirmation of employment from your employer. This should be on company headed paper and signed by a senior member of staff with contact details provided.

You'll be eligible to apply for a Tuition Fee Loan and Disabled Students' Allowance if you're studying at level 4 and above.

You'll normally only be eligible for a Maintenance Loan if you're studying at level 6 or 7. Part time students who'll be studying a level 5 course in Dental Health/Dental Therapy or Operating Department Practice may be eligible for a Maintenance Loan.

The list below gives examples of the common course types at each level:

- Level 4 – Higher National Certificate (HNC) or Certificate of Higher Education (CertHE)
- Level 5 – Higher National Diploma (HND), Diploma of Higher Education (DipHE) or Foundation degree
- Level 6 – Bachelor's degree (with or without honours), Professional Graduate Certificate in Education (PGCE) or Graduate certificate/diploma
- Level 7 – Integrated Master's degree or Postgraduate Certificate in Education (PGCE)

If you're still not sure what level your course is, check with your university or college.

Course details

b1 If the course details you give us can't be confirmed yet, your student funding may be delayed.

b2 If you are unsure about the tuition fee amount you will be charged, please contact your university or college.

Each module you study is worth a number of credits. You should agree how many credits you'll study with your university or college.

If you can't confirm how many credits you'll be studying during the academic year yet, we'll assess your application at 25% intensity. You should contact us once you've agreed your credits with your university/college.

To apply for a Tuition Fee Loan and/or a Maintenance Loan, you need to have a course intensity of at least 25% in the academic year.

c A part-time postgraduate Initial Teacher Training (ITT) course is a course taken after a first degree has been attained (Postgraduate Certificate in Education (PGCE) and equivalent courses). These are courses of at least one academic year in length and completed in no more than four.

Armed Forces

c You may be eligible for support to study a distance learning course outside of England if you or your family member (who you live with) is currently serving outside England in one of the following:

- The Naval Service (Royal Navy and Royal Marines)
- The Army
- The Royal Air Force
- The Royal Military Police
- The Gurkhas

The following family members will be eligible students:

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

c If you're studying a part-time distance learning course and you do not have a disability preventing from attending and/or are not a member or family member of someone currently serving in the Armed Forces, you're not eligible for a Maintenance Loan.

Term details

If you have applied for income assessed support you may be eligible to apply for Travel Grant.

- d** You must tell us if where you're living changes and you may be asked to give evidence of this. This is so we can make sure you get the right amount of student finance. You can update any changes in your online account.
- e** If you're studying an Initial Teacher Training course, you should select 'University or college' for any time you'll spend in teaching practice.

You must tell us if where you'll spend most of your time changes. This is so we can make sure you get the right amount of student finance. You can make these changes in your online account.

NHS bursary

- f** If you are eligible to apply for a social work bursary from the National Health Service Business Services Authority (NHSBSA) you should answer 'No' to this question because this is a separate bursary to those offered by the National Health Service (NHS) or the Department of Health (DoH).

If you're studying on a Paramedic course at an English university/college and are eligible to apply for tuition fee and/or living cost support from your local ambulance/health trust, you should answer yes to this question.

If you are eligible to apply for a bursary (income or non-income assessed) – you are not eligible for any student finance. The only exception would be if you are a seconded student studying a health related course and you have been advised that you cannot apply for any bursary at all, either income or non-income assessed.

If you are unsure about your eligibility for a bursary, contact the NHSBSA.

Evidence e

	Evidence of	Photocopied evidence item required
c	Distance learning for a reason related to a disability	<ul style="list-style-type: none"> • a note from the student's doctor clearly stating that their medical condition prevents them from attending a part-time higher education course; and • information from the student of the equivalent part-time course and provider they wished to attend but are unable to do so.
c	Distance learning for a reason related to a disability at a provider that would otherwise require attendance	<ul style="list-style-type: none"> • a note from the student's doctor clearly stating that their medical condition prevents them from attending a part-time higher education course; and • a note from the provider confirming the student is undertaking that course by distance learning because they are unable to attend their course due to a disability. • you do not need to provide evidence from a university/college confirming that you are unable to attend an equivalent full-time course due to a disability.
c	Your Armed Forces details	<p>A letter that's signed, dated and stamped by the Armed Forces Unit Records Office confirming the following:</p> <ul style="list-style-type: none"> • your name • your address (or BFPO address) • which country you were resident in before you were based at your current location • if you're currently based overseas or in the UK but outside England
c	Your family member's Armed Forces details	<p>A letter that's signed, dated and stamped by the Armed Forces Unit Records Office confirming the following:</p> <ul style="list-style-type: none"> • their name • their address (or BFPO address) • your name • their relationship to you • if they're currently based overseas or in the UK but outside England • if you have been ordinarily resident in the UK, which country they were ordinarily resident in before they were based at their current location • if you've never been ordinarily resident in the UK, which country they signed up for the Armed Forces in

Loan request section

Maintenance Loan

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

Tuition Fee Loan

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

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

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

Liability date	% of total Tuition Fee loan that you will be liable for
First day of Term 1	25%
First day of Term 2	50%
First day of Term 3	100%

If you are unsure when your term starts please contact your university or college.

Each payment is made after we receive confirmation from your university or college that you have attended at the start of each term. Interest will be charged from the day we pay the Tuition Fee Loan to your university or college.

Applying for a loan at a later date or changing the amount requested

You can apply for a Maintenance Loan or Tuition Fee Loan any time in the academic year provided you are within the time limit. The time limit for applying is usually nine months from the start of your academic year.

You can apply for a Maintenance Loan or Tuition Fee Loan or change the amount you originally requested at www.gov.uk/studentfinance

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

b Irreconcilable estrangement

You will normally be considered irreconcilably estranged from your parents if you have not had verbal or written contact with both of your biological or adoptive parents, or your only living parent before the start of your academic year, and this will not change.

You will not be considered irreconcilably estranged from your parents because:

- you do not get on with your parents;
- you do not live with them;
- your parents do not want to give details of their income; or
- your parents choose not to provide you with financial support.

In the legal care of a local authority

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

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

- income from employment;
- benefits;
- state studentships;
- scholarships, exhibitions and bursaries.

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

Evidence 

Question	Evidence of	Photocopied evidence item required
a3	Care of a child	<ul style="list-style-type: none"> • A photocopy of the child's/children's birth certificate(s) and evidence that you have care of the child, for example, photocopied evidence that you are receiving Child Benefit, Child Tax Credit or the child element of Universal Credit.
c	Supporting yourself financially	<ul style="list-style-type: none"> • A photocopy of your P60s or benefit information.

Section 7

Student financial questions

The academic year is determined by when you begin your study, see page 8 for academic year dates.

Unearned income

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

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

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

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

Payments from an employer

b1 You should only provide an amount here if you are being released from employment by your employer to attend your course. If this is the case, you should only include salary or wages that you will receive from that employer for days you are actually attending your course and have been released from your employment to do so. Any earnings from salary or wages entered here may affect your student finance entitlement.

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

Evidence **e**

Question	Evidence of	Photocopied evidence item required
c	Date of birth of any children	• A photocopy of the child's/children's birth certificate(s).

Section 8

About your family

Dependent students

If you are a dependent student, the following family members count for the purpose of income assessment:

- Your natural or adoptive parents, if both of them live with you.
- Your parent and their partner, if they have one.
- Your parent's partner is defined as:
 - Your stepmother or stepfather.
 - Your parent's opposite or same sex partner if they live together as though they were married or in a civil partnership.

Independent students

For the purpose of income assessment, if you are an independent student, only your partner, if you have one, counts.

Your partner is defined as:

- Your husband, wife or civil partner.
- Your opposite or same sex partner, if you are 25 or over on the first day of the academic year and you live with your partner as though you are married or in a civil partnership.

If you do not have a partner as defined above we will only assess your income.

Question	Evidence of	Photocopied evidence item required
b	Parent's current relationship status if they are separated, divorced or they have had their civil partnership dissolved	A photocopy of: <ul style="list-style-type: none">• Decree absolute/Decree nisi, or• Dissolution order, or• A letter from their solicitor confirming their status.

Terms and Conditions

If you cannot sign the form it must be signed on your behalf by your attorney. The Power of Attorney letter must be sent with the application before a signature from that attorney will be accepted.

Privacy Notice

SLC and the Department for Education are joint Data Controllers under the Data Protection Legislation. We hold information for the purposes specified in our notification to the Information Commissioner including determining eligibility for student finance, assessing the maximum amount of financial support available, payment of student finance and the detection and prevention of fraud, and may use this information for any of these.

To find out how we'll use the information you provide go to **www.gov.uk/studentfinance** to read our Privacy Notice.

If you don't have internet access, please call us on **0300 100 0607** and we can send a copy to you.

Change of circumstances

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

The most common changes of circumstance would be if:

- you are absent from the course for more than 60 days because of illness;
- you are absent for any period of time for any other reason;
- you leave, abandon or are expelled from the course;
- you stop attending or undertaking the course and do not intend, or are not allowed, to return for the rest of the academic year;
- you transfer to a different course at the same, or a different, university or college;
- you transfer from a part-time to a full-time course;
- you repeat part or all of a year of your course; or
- the date of the start or end of your course changes.

If any of your course details change, or you suspend, withdraw or transfer you must speak to your university or college who will let us know. You can still make changes to your personal details online. Just log into your account at **www.gov.uk/studentfinance**

Section 9

Financial details for tax year 2019-20 for parents and partners

Self assessed

If you completed an online tax return

You should refer to your saved online tax return for the income figures required in this section.

If you completed a paper tax return

There's an online guide to help you answer the questions in this section which you can download from www.gov.uk/studentfinance

What happens if my household income has changed since tax year 2019-20?

If your total household income (before tax) for tax year 2021-22 will be at least 15% less than it was in tax year 2019-20, still complete this section as well as completing a Current Year Income Assessment Form.

You can download this form at www.gov.uk/studentfinance



Please note that a current year income assessment cannot be carried out unless you provide your financial details for the 2019-20 tax year.

Part B - Data sharing and you

We will check the financial information that you provide with HM Revenue & Customs (HMRC). This information will be kept securely and held strictly under the provisions of the applicable data protection legislation in the UK.

If you fail to provide your National Insurance (NI) number on the application form we will ask you to provide copies of your financial documents.

If your NI number is shown on any documents you send us in support of an application, we will use this information and share and check it with HMRC in order to obtain accurate financial information about you.

Part C - Your financial information

Please give financial information for tax year 2019-20. Normally, this is the year ending 5 April 2020, but may differ if your employer or business has a tax year which does not end in April.

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

Q1 Income from salary, wages, taxable state benefits or from occupational or private pensions

a Total income from salary/wages

You should refer to your 2019-20 P60 or final payslip for your income from salary/wages. If as part of your salary or wages for tax year 2019-20 you received tips and other payments that did not show on your P60, you still need to include this figure when providing your total income amount earned from employment.

Section 9

Financial details for tax year 2019-20 for parents and partners

b Taxable state benefits

You should refer to your 2019-20 P60 or P45 from the Department of Work and Pensions for your taxable state benefit details. Only include income received for the following benefits:

- Bereavement Allowance
- Carer's Allowance
- Contribution-based Employment and Support Allowance
- Graduated Retirement Benefit
- Incapacity Benefit (only include the amount received after 28 weeks of incapacity)
- Industrial Death Benefit
- Jobseeker's Allowance
- Statutory Adoption Pay
- Statutory Maternity Pay
- Statutory Paternity Pay
- Statutory Sick Pay
- Widowed Parent's Allowance

Do not include income from any other benefits, including Universal Credit.

Occupational/private pension

If you received an occupational or private pension, you should refer to your P60P or annual statement from your pension provider.

Q3 Income from savings and investments

To make this question easier to answer, we have split it into 4 separate parts. You may or may not have received income from every part, just tell us about the ones you did.



Only tell us about the amount of interest/income you gained from savings and investments during tax year 2019-20, not the actual amount of savings or invested sums you had.

a Income from UK banks, building societies and unit trusts

Tell us about the amount of interest/income you received from the following savings and investment income type(s):

- Gross UK interest (before tax has been deducted)
- You must include interest you receive on bank, building society and other savings account, unless specifically non-taxable, for example, a non-taxable Individual Savings Account (ISA) etc.

If you did not declare any savings and investment income to HMRC

Please refer to your bank or building society statements for these figures.

b Income from UK life insurance gains, securities and partnerships

Tell us about the amount of interest/income you received from the following savings and investment income type(s):

- Interest from gilt edged and other UK securities – gross amount before tax
- UK life insurance policy etc. gains on which tax was treated as paid
- UK life insurance policy etc. gains on where no tax was treated as paid
- UK life insurance policy etc. gains from voided ISAs
- Your share of taxed interest etc.
- Total untaxed savings income taxable at 20%
- Taxed income taxable at 10%
- Taxed income taxable at 20%

Section 9

Financial details for tax year 2019-20 for parents and partners

c Income from UK investments and dividends

Tell us about the amount of interest/income you received from the following savings and investment income type(s):

- Dividends from UK companies
- Other dividends
- Stock dividends
- Non-qualifying distributions and close company loans written off or released
- Share schemes – taxable amount

d Income from foreign investment and dividends

Tell us about the amount of interest/income you received from the following savings and investment income type(s):

- Foreign dividends
- Interest and other income from overseas savings
- Dividends from foreign companies
- Dividend income received by a person overseas

Q4 Income from taxable benefits in kind

P11D

The following table provides a breakdown of what we want you to include as part of your total income from 'taxable benefits in kind' during tax year 2019-20. Add together all the benefits in kind you received and write your total figure on the form.

Benefit in kind
Assets placed at employee's disposal (cars, property, goods or other assets)
Payments made on behalf of employee
Vouchers and credit cards
Living accommodation
Mileage allowance and passenger payments
Total cash equivalent of all cars/vans made available
Total cash equivalent of fuel for all cars/vans made available
Cash equivalent of loans after deducting any interest paid by the borrower
Private medical treatment or insurance
Qualifying relocation expenses payments and benefits
Services supplied
Assets placed at employees disposal
Other items (including subscriptions and professional fees)
Expenses payments made to, or on behalf of, the employee

Section 9

Financial details for tax year 2019-20 for parents and partners

Part D - Other income

Q1 Income from self-employment

To make this question easier to answer, we have split it into 2 parts. You may or may not have received self-employment income from both parts, just tell us about the ones you did.

a Total adjusted profit from businesses

You should include the income type below as your answer for the total amount of adjusted profits you received from self-employment during tax year 2019-20

- Total adjusted profits from this business (aggregated for multiple self-employments)

b Total adjusted profit from partnerships

You should include the income type(s) below as your answer for the total adjusted profit you received from partnerships during tax year 2019-20

- Share of total taxed and untaxed income other than that taxable at 10% and 20%
- Your share of total adjusted profit from the partnerships

Q2 Minister of religion

Tell us about the amount of income you received from the following income type during the 2019-20 tax year:

- Taxable income minus expenses (Ministers of religion) that are not included in your P60 or P11D

Q3 Other income and lump sums

You should include the income type(s) below as your answer for the amount of income you received from other income and lump sums.

Add together the income types below that you received during tax year 2019-20 and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

- Other taxable income - before expenses and tax taken off
- Foreign earnings not taxable in the UK
- Taxable lump sums
- Lump sums or benefits received from an Employer Financed Retirements Benefit Scheme excluding pensions
- Redundancy and compensation for loss of job

Q4 Income from property lettings

You should include the income type(s) below as your answer for the amount of income you received from property lettings.

Add together the income types below that you received during the 2019-20 tax year and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

- Income from UK property
- Income from foreign property or land

Q5 Income from UK trusts

You should include the income type(s) below as your answer for the amount of income you received from UK trusts.

Add together the income types below that you received during tax year 2019-20 and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

- Discretionary income payment from a UK resident trust - Net amount
- Discretionary income payment from a UK resident trust - Total payments from settlor-interested trusts
- Non-discretionary income entitlement from a trust – net amount of non-savings income
- Non-discretionary income entitlement from a trust – net amount of savings income
- Non-discretionary income entitlement from a trust – net amount of dividend income
- Income chargeable on settlors
- Income from UK estates
- Foreign estate income

Q6 Foreign income

You should include the income type(s) below as your answer for the amount of income you received from foreign income.

Add together the income types below that you received during tax year 2019-20 and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

- Total taxable amount of overseas pensions, social security benefits and royalties etc.
- Total taxable amount of all other income received by a person abroad and any remitted 'ring fenced' foreign income
- Gains on disposals of holdings offshore funds and discretionary income from non-resident trusts
- Benefit received from an overseas trust, company or other person
- Gains on foreign life policies (amount of gain)

Section 9

Financial details for tax year 2019-20 for parents and partners

Q7 Income from an overseas pension

You should include the income type(s) below as your answer for the amount of income you received from an overseas pension.

Add together the income types below that you received during tax year 2019-20 and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

- Value of pension benefits in excess of your Available Lifetime Allowance, taken by you as a lump sum
- Amount of unauthorised payment from a pension scheme, not subject to surcharge
- Total amount of unauthorised payment from a pension scheme, subject to surcharge
- Taxable short service refund of contribution (overseas pension schemes only)
- Taxable lump sum death benefit payment (overseas pensions only)

Q8 Other overseas income and gains

You should include the income type below as your answer for the amount of income you received from other overseas income and gains.

Add together the income types below that you received during tax year 2019-20 and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

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

Part E - Income deduction

Q3 Allowable expenses on which you claimed tax relief

The list below is a breakdown of what we want you to include in your answer for the amount of allowable expenses you had on which you claimed tax relief.

Add together all allowable expenses below which you have had during tax year 2019-20 and tell us your total figure on the form. You may not have had all the allowable expenses listed, just tell us about the ones you did.

- Total amount of allowable expenses
- Foreign tax for which tax credit relief not claimed
- Business travel and subsistence expenses
- Fixed deductions for expenses
- Professional fees and subscriptions
- Other expenses and capital allowance

Part F – Your dependants

Q1 The child dependant's income is required to assess eligibility for deductions in the calculation of household income for each child that is wholly or mainly financially dependent on the student, the student's husband, wife or partner or the student's parents or step parents. You can find out more information about how household information is calculated at www.gov.uk/studentfinance

Please do not include income from sources such as the Government Child Trust, State Child Benefit, Child Tax Credit, child element of Universal Credit or minimal sums of money from other sources when entering a child dependant's income.

Declaration for parents and partners

If you cannot sign the form it must be signed on your behalf by your attorney. The Power of Attorney letter must be sent with the application before a signature from that attorney will be accepted.

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Changes of circumstance

You must notify SLC about any change in your circumstances which may affect the student's entitlement to financial support.

The most common changes of circumstance would be if:

- your household income changes; or
- your marital status changes.