

About these notes

Use these notes to help you complete your 'Postgraduate Doctoral Loan Application form'.

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

How to use these notes



Where you see this in your Postgraduate Doctoral Loan Application form it means there's additional information in these notes to help you.

This could be information about how to complete a question or section or an instruction to send specific supporting documents.

These notes are in sections and numbered in the same way as the questions in the application form.

Read these notes - if you don't answer a question or section correctly or you don't include the documents we need this will delay any payments.

Alternative formats

All of our forms and guides are available in Braille, large print format or audio. If you need these, you can request them by emailing your name, address and details of the format you require to: brailleandlargefonts@slc.co.uk or call **0141 243 3686** (this number is only for alternative format requests).

Section 1 Your details

1.1 Change of name

If your name has changed since your passport or birth certificate was issued you need to prove that your name has legally changed.

You need to send us one of the following:

- your change of name deed; **or**
- your marriage certificate or civil partnership documentation; **or**
- a final or conditional order; **or**
- your divorce certificate or dissolution order.

1.4 Your nationality

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

1.5 UK National Insurance number

We can't pay your full loan until you've given us your National Insurance number.

If you've never been given a National Insurance number, you can leave the National Insurance number box blank and carry on with your application.

We'll contact the Department for Work and Pensions if you have one. If you don't we'll write to you to advise how to obtain one.

Alternatively, you can go to **www.gov.uk/apply-national-insurance-number** to apply for one.

Section 2 Your previous study

2.2 Qualification gained

If you have a:

- Higher Doctorate (e.g. DLitt, DSc, DTech, LLD, DD, DMus, DMedSc)
- Doctoral degree (e.g. PhD/DPhil, EdD, DBA, DClinPsy)

You are not eligible to receive a Postgraduate Doctoral Loan.

Section 3 Your postgraduate course

3.1 A full Postgraduate Doctoral course

If you are using previous study or experience to bypass part of your course and top up to a doctoral degree you can't receive a Postgraduate Doctoral Loan.

Your course is not a full doctoral degree if it is one of the following:

- Doctorate by publication
- Higher Doctorate

If you are unsure if you are studying a full Postgraduate Doctoral course you should ask your university or college.

3.2 Course applied for

Course duration

You should select the number of years you expect it will take to complete your course. If you need to you can change your course length at a later date.

3.3 Social Work bursary

Students are **not** eligible for a Postgraduate Doctoral Loan if they're in receipt of a social work bursary. If you're unsure if you can apply for this, you need to speak to your university.

If you are in receipt of a Social Work travel allowance bursary only, you can still apply for a Postgraduate Doctoral Loan.

If you have applied for this and been rejected you need to send your rejection letter with your application. We can't accept your application without this.

3.4 NHS bursary

Students are not eligible for a Postgraduate Doctoral Loan if they're able to apply for or are getting an NHS bursary. If you're unsure if you can apply for this, you need to speak to your university.

3.5 Research Council Funding

Students are not eligible for a Postgraduate Doctoral Loan if you will be receiving Research Council Funding during any part of your course. If you're unsure if you can receive Research Funding you need to speak to your university or college to check.

3.6 Educational Psychology bursary

Students are not eligible for a Postgraduate Doctoral Loan if you will be receiving an Educational Psychology bursary during any part of your course. If you're unsure if you can receive an Educational Psychology bursary you need to speak to your university or college to check.

Section 3 Your postgraduate course

3.7 Distance Learning course

If you are not studying distance learning due to you or a family member being in the Armed Forces you must be living in England on the first day of your course to be eligible for a Postgraduate Doctoral Loan.

Are you studying on a distance learning course because you or a member of your family are in the Armed Forces?

You may be eligible for support to study a distance learning course if you or your family member is currently serving both in and outside of the UK 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 of England
- a dependant parent living with either;
 - a child who is a member of the UK Armed Forces serving outside of England
 - the child's spouse or civil partner who is a member of the UK Armed Forces serving outside of England

If you are studying in a different country from where you or your family member are posted you can only get a Postgraduate Doctoral Loan if you study less than half of your course in that country.

What you need to send

You need to send a letter confirming your name and your address, or British Forces Post Office address.

If your family member is in the Armed Forces, you need to send a letter confirming the following:

- their name
- their address or British Forces Post Office (BFPO) address
- your name
- their relationship to you

The letter you send must be stamped, signed and dated by the Armed Forces Unit Records Officer. We can't accept a photocopy. We recommend that you use your BFPO address for all correspondence.

Section 4 Your residency information

4.1 & 4.2 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 4, you do not need to send any further evidence of your UK nationality.

If it has expired, or is about to expire, you need to send:

- a photo copy of your UK birth or adoption certificate

Armed forces

If you, your parent(s) 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.

4.1.1 Chagossians with British citizenship and their family members

You must be the child, grand-child or other direct descendant of a Chagossian with British citizenship in order to be eligible as a family member.

If you are a Chagossian with British citizenship and don't have a UK passport, you need to send us your original birth certificate.

If you're the family member of a Chagossian with British citizenship, you need to send us documents to show that you're a direct descendant. This can be:

- your own original birth certificate
- the birth certificates of parents, grandparents or others you're directly descended from
- change of name deed polls

Section 4 Your residency information

4.3 Irish citizen

You must send your original ROI passport or national identity card.

If you hold a UK passport, you should provide your passport details in section 4 as you do not need to send further evidence of your nationality.

4.4 Family member of a UK national

By family member, you must be the:

- husband, wife, civil partner;
- child, step-child or other direct descendant of a UK national.

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

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

You must also send proof of your relationship to the UK national.

This may be:

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

If you are a child, step-child or other direct descendant of a UK national, you must be under 21 or dependent on the person or the person's spouse or civil partner.

You need to give us some details about your identity and residency at question **4.27**.

Section 4 Your residency information - continued

4.5 Family member of an Irish citizen

By family member, you must be the:

- husband/wife/civil partner;
- parent/step-parent or other direct ascending relative;
- child, step-child or other direct descendant of an Irish citizen.

If you are a child, step-child or other direct descendant you must be under 21 or dependent on the Irish citizen family member.

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

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

If you have pre-settled status and have been in the UK, the EEA, Switzerland or the Overseas Territories for three years, ascending line relatives of Irish citizens are eligible.

You must provide evidence to confirm your family member is an Irish citizen and your relationship to them by sending their original ROI passport or national identity card and your birth certificate or marriage certificate (if this shows proof of their Irish citizenship and your relationship to them).

You need to give us some details about your identity and residency at question **4.27**.

Section 4 Your residency information - continued

4.6 Family member of a person of Northern Ireland

By family member, you must be the:

- husband/wife/civil partner;
- parent/step-parent or other direct ascending relative;
- child, step-child or other direct descendant of a person of Northern Ireland.

If you are a child, step-child or other direct descendant you must be under 21 or dependent on the person of Northern Ireland .

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

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

If you have been in the UK and Islands for three years and the person of Northern Ireland was in the UK, ascending line relatives of the person of Northern Ireland are not eligible.

If you have pre-settled status and have been in the UK, the EEA, Switzerland or the Overseas Territories for three years, ascending line relatives of the person of Northern Ireland are eligible.

You must provide evidence to confirm your family member is a person of Northern Ireland and your relationship to them by sending their original ROI or UK passport and your birth certificate or marriage certificate that shows your relationship to them.

You need to give us some details about your identity and residency at question **4.27**.

Section 4 Your residency information - continued

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

If you're an EU national

You need to give us some details about your identity and residency at question **4.27**.

If you're the family member of an EU national

You must also send proof of your relationship to the EU national.

You need to give us some details about you and your family member's identity and residency at question **4.28**.

If your status was awarded by the government of Jersey, Guernsey or the Isle of Man, you need to send us a photocopy of your status document.

4.8 EU national, family member of an EU national who is a resident in Gibraltar

By family member, you must be the:

- husband/wife/civil partner;
- parent/step-parent or other direct ascending relative;
- child, step-child or other direct descendant (must be under 21 years of age or dependent on the EU national)

of an EU national who is a resident in Gibraltar.

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

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

If you're an EU national

You need to give us some details about your identity and residency at question **4.27**.

If you're the family member of an EU national

You must also send proof of your relationship to the EU national.

You need to give us some details about you and your family member's identity and residency at question **4.28**.

Section 4 Your residency information - continued

4.9 UK national, family member of a UK national who is a resident in Gibraltar

By family member, you must be the:

- husband/wife/civil partner
- child, step-child or other direct descendant (you must be under 21 or dependent on the UK national)

of a UK national who is a resident in Gibraltar.

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

If you're a UK national, you must send your original UK passport, or original UK birth or adoption certificate.

If you're the family member of a UK national, you must:

- send your valid passport, or original birth or adoption certificate;
- provide evidence to confirm your family member is a UK national;
and
- prove your relationship to your UK national family member by sending their original UK passport, or original UK birth or adoption certificate and your birth certificate or marriage certificate (if this shows proof of their UK nationality and your relationship to them).

You need to give us some details about your identity and residency at question **4.27**.

4.10 Child of a Swiss national

To get a Postgraduate Doctoral Loan 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 academic year. You must have settled or pre-settled status and be ordinarily resident in the UK, the EEA, Switzerland or the Overseas Territories for the three years prior to the first day of your first academic year.

Go to the residency history section on page 21 to find out when your academic year starts.

You need to give us some details about you and your family member's identity and residency at question **4.28**.

To get a Postgraduate Doctoral Loan as the child of a Swiss national, your Swiss national parent must be resident in the UK on the first day of the academic year. We need a signed letter from your Swiss national parent stating their UK address, and that they live there on the first day of the academic year.

They must also send one of the following documents:

- bank statement
- payslip
- tenancy agreement/mortgage statement
- utility bill
- local authority correspondence
- government department correspondence

Section 4 Your residency information - continued

4.11 EEA or Swiss national worker

You need to give us some details about your identity and residency at question 4.27.

You need to send:

- a completed Postgraduate Doctoral Loan UK Employment Status form.

The Postgraduate Doctoral Loan UK Employment Status form is available to download at **www.gov.uk/doctoralloan/apply**

Complete and return this additional form with any supporting documents along with your main application form to ensure that your funding can be in place as soon as possible.

If you can't return your additional form with your main application form, get it to us as soon as possible. We won't be able to confirm if you can get a Postgraduate Doctoral Loan without this additional completed form.

Section 4 Your residency information - continued

4.12 Family member of a European Economic Area (EEA) national or Swiss national worker

By family member, you must be the:

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

of the EEA or Swiss national.

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

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

Other family relationships are excluded from the definitions above.

You need to send evidence of your relationship to the person who holds the status if it is not you.

You need to give us some details about you and your family member's identity and residency at question **4.28**.

You need to send:

- a completed Postgraduate Doctoral Loan UK Employment Status form.

The Postgraduate Doctoral Loan UK Employment Status form is available to download at **www.gov.uk/doctoralloan/apply** Complete and return this additional form with any supporting documents along with your main application form to ensure that your funding can be in place as soon as possible.

If you can't return your additional form with your main application form, get it to us as soon as possible. We won't be able to confirm if you can get a Postgraduate Doctoral Loan without this additional completed form.

Section 4 Your residency information - continued

4.13 Child of a Turkish worker who is working in the UK

To apply for a loan as the child of a Turkish worker, your Turkish parent must be working in the UK on the first day of your course.

You must also be living in the UK on the first day of the first academic year of your course and have lived in the UK, the EEA, Turkey, Switzerland or Overseas Territories for 3 years before the start of your course.

You need to send proof of your relationship, send us:

- a birth or marriage certificate

You also need to send proof of your Turkish parent's employment in the UK, for example send us:

- a contract of employment

And you also need to send your Turkish parent's proof of the extension of their Leave to Remain in the UK after 31 December 2020 from the Home Office.

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

You need to give us some details about you and your family member's identity and residency at question **4.28**.

4.14 Settled status not granted under the EU Settlement Scheme

'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 enter or remain'.
- You have a right of abode in the UK.

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

You need to give us some details about your identity and residency at question **4.27**.

4.15 Family member of a person with settled status in the UK

By family member, you must be the:

- husband/wife/civil partner;
- child, step-child or other direct descendant (you must be under 21 or dependent on the person with settled status)

of a person with settled status in the UK.

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

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

- your family member is a British citizen.
- your family member has been granted 'indefinite leave to enter or remain'.
- your family member has a right of abode in the UK.

You need to give us some details about you and your family member's identity and residency at question **4.28**.

Section 4 Your residency information - continued

4.16 Limited leave to enter or remain in the UK under a Ukraine Scheme

If you were granted this leave

You need to give us some details about your identity and residency at question **4.29**.

If your family member was granted this leave

You need to send evidence of your relationship to the person who holds the status if it is not you.

You must have been the spouse or civil partner of the person with leave on the date of the leave application.

If you're the child or step-child of the person with leave, you must have been the child or step-child on the date of leave application, and also under the age of 18 on that date.

You need to give us some details about you and your family member's identity and residency at question **4.30**.

4.17 Afghan Relocations and Assistance Policy (ARAP), the Afghan Citizens Resettlement Scheme (ACRS) or the Afghanistan Response Route (ARR)

If you were granted this leave

You need to give us some details about your identity and residency at question **4.29**.

Expiry date

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

If your family member was granted this leave

You need to send evidence of your relationship to the person who holds the status if it is not you.

Expiry date

If your:

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

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

You need to give us some details about you and your family member's identity and residency at question **4.30**.

Afghan Locally Employed Staff Ex-Gratia Scheme

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

Section 4 Your residency information - continued

4.18 Refugee status

You need to send evidence of your relationship to the person who holds the status if it is not you.

If you are claiming a Postgraduate Doctoral Loan as the child or step-child of someone who has been granted this status, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming a Postgraduate Doctoral Loan as the husband, wife or civil partner of someone who has been granted this status, you must have been their husband, wife or civil partner at the time of their application.

Expiry date

If you or your:

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

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

If you were granted this leave

You need to give us some details about your identity and residency at question **4.29**.

If your family member was granted this leave

You need to give us some details about you and your family member's identity and residency at question **4.30**.

Section 4 Your residency information - continued

4.19 Humanitarian Protection

You need to send evidence of your relationship to the person who holds the status if it is not you.

If you are claiming a Postgraduate Doctoral Loan as the child or step-child of someone who has been granted this status, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming a Postgraduate Doctoral Loan as the husband, wife or civil partner of someone who has been granted this status, you must have been their husband, wife or civil partner at the time of their application.

Expiry date

If you or your:

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

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

If you were granted this leave

You need to give us some details about your identity and residency at question **4.29**.

If your family member was granted this leave

You need to give us some details about you and your family member's identity and residency at question **4.30**.

Section 4 Your residency information - continued

4.20 Stateless Person

You need to send evidence of your relationship to the person who holds the status if it is not you.

If you are claiming a Postgraduate Doctoral Loan as the child or step-child of someone who has been granted this status, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming a Postgraduate Doctoral Loan as the husband, wife or civil partner of someone who has been granted this status, you must have been their husband, wife or civil partner at the time of their application.

Expiry date

If you or your:

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

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

If you were granted this leave

You need to give us some details about your identity and residency at question **4.29**.

If your family member was granted this leave

You need to give us some details about you and your family member's identity and residency at question **4.30**.

Section 4 Your residency information - continued

4.21 Domestic violence or abuse

You need to send evidence of your relationship to the person who holds the status if it is not you.

If you are claiming a Postgraduate Doctoral Loan as the child or step-child of a person granted indefinite leave to enter or remain as a victim of domestic violence, 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 were granted this leave

You need to give us some details about your identity and residency at question **4.29**.

If your family member was granted this leave

You need to give us some details about you and your family member's identity and residency at question **4.30**.

4.22 Section 67

You need to send evidence of your relationship to the person who holds the status if it is not you.

If you are claiming a Postgraduate Doctoral Loan as the dependent child or step-child of a person granted leave to remain in the UK under Section 67 of the Immigration Act 2016, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

You need to give us some details about your identity and residency at question **4.29**.

4.23 Calais leave

You need to send evidence of your relationship to the person who holds the status if it is not you.

You need to give us some details about your identity and residency at question **4.29**.

4.24 Bereaved partner

You need to send evidence of your relationship to the person who holds the status if it is not you.

If you are claiming a Postgraduate Doctoral Loan as the child or step-child of a person granted indefinite leave to enter or remain as a bereaved partner, 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 were granted this leave

You need to give us some details about your identity and residency at question **4.29**.

If your family member was granted this leave

You need to give us some details about you and your family member's identity and residency at question **4.30**.

Section 4 Your residency information - continued

4.25 Long Residence requirements

To be eligible for support under the Long Residence category you must have lawful ordinary residence in the UK and Islands for the three year period before the first day of the first academic year of your course and must be ordinarily resident in England. This means that 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 immediately before the first day of the first academic year of your course.

If you are 18 or over 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.

In addition, you will also need to be:

- ordinarily resident in England on the first day of the first academic year of your course;
- have been ordinarily and lawfully resident in the UK and Islands throughout the 3 year period preceding the first day of the first academic year of your course; **and**
- in the 3 years referred to above, not have moved to the UK and Islands wholly or mainly for the purposes of education.

Examples of some of the evidence items you could send are:

- application for Leave to Remain, or asylum, or listed as a dependant on such a claim
- Council Tax records
- wage slips
- P60 / P45
- Child Tax Credits and Child Benefit letters (in your parent's name, with you named on the award)
- original school/college exam certificates
- a letter from a teacher (on headed paper, signed with day specific dates of attendance DD/MM/YYYY).

Section 4 Your residency information - continued

4.25 & 4.26 Long Residence requirements

- You must have been living in the UK and Islands legally for the three years prior to the first day of the first academic year of your course.
- You must have held a form of leave to remain in the UK issued by the Home Office during that time. This will usually be limited leave to remain or discretionary leave to remain, but other types of leave are also acceptable.
- If you had more than one type of leave to remain during the 3 years before the start of the first academic of your course, you must have applied for the second type of leave before the last one expired.
- You must be living in England on the first day of the first academic year of your course.
- If you're under 18 on the first day of their course, you must have lived in the UK for at least 7 years.
- If you're 18 or above on the first day of your course, you must have been living in the UK for at least half of your life, or 20 years, whichever is less.
- If your leave to remain in the UK expires while you're studying, we'll ask you to send us documents to show that you have a new form of leave.

Examples of some of the evidence items you could send are:

- application for Leave to Remain, or asylum, or listed as a dependant on such a claim
- Council Tax records
- wage slips
- P60 / P45
- Child Tax Credits and Child Benefit letters (in your parent's name, with you named on the award)
- original school/college exam certificates
- a letter from a teacher (on headed paper, signed with day specific dates of attendance DD/MM/YYYY)

Section 5 Your address history

5.2 Residency status

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

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

Section 8 Terms and conditions

Power of Attorney

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