



# Notes to help you complete your Application for Student Finance (Continuing Students) **2011/12**

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**Student Finance England and Student Loans Company (SLC) deliver financial support to students on behalf of the Department for Business, Innovation and Skills (BIS).**

You should **not** be completing the PR1 form if any of the following apply to you:

- 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. If this is the case, you should contact whichever of the following organisations is relevant:
  - Your Local Authority (LA) in Wales
  - The Student Awards Agency for Scotland (SAAS)
  - Your local Northern Ireland Education and Library Board (ELB)
  - The Education Department of Guernsey or Jersey
  - The Education Department for the Isle of Man
- You are studying on a distance learning course for a reason which is not related to a disability. If this is the case, you should instead complete a PTG1 form to apply for student finance. The PTG1 form will be available from August 2011.
- You are a national of a European Union Member State and you have moved to England to attend a higher education course. If this is the case, you should contact the EU Customer Services Team at: PO Box 89, Darlington, County Durham, England, United Kingdom, DL1 9AZ. Phone: 0141 243 3570.
- You are attending a part-time higher education course other than a postgraduate course for Initial Teacher Training that began before 1st September 2010.
- You will be starting a course in a health related discipline and are eligible to apply for a bursary from the National Health Service (NHS) or Department of Health (DoH) which is not assessed on your household income, excluding the social work bursary.

You must use these notes whenever you see this icon within the main PR1 form. 

Any evidence that you are required to provide is also outlined in these notes and is marked with this icon. 

Wherever you see this evidence icon on the PR1 form, you should check these notes for information on the evidence required.

## section 1 finance available

### Maintenance Loan **REPAYABLE**

You may not be eligible for a Maintenance Loan if you already hold a UK honours degree, unless you are taking a particular vocational degree.

If you are assessed as being eligible to receive the Maintenance Grant then the amount of Maintenance Loan available to you may be reduced.

### Tuition Fee Loan **REPAYABLE**

You may not be eligible for a Tuition Fee Loan if you already hold a UK honours degree.

If you are undertaking a course at a university or college in England, Wales or Northern Ireland that is charging variable or flexible tuition fees, up to a maximum of £3,375, you will be able to take out a Tuition Fee Loan to cover some or all of these fees (depending on how much you are charged and how much you wish to borrow).

If you are undertaking a course at a university or college in England, Wales or Northern Ireland that is not charging variable or flexible tuition fees then the tuition fee chargeable could be any amount up to a maximum of £1,345. You can apply for a Tuition Fee Loan to cover this cost.

If you are undertaking a course at a university or college in Scotland, you can apply for a Tuition Fee Loan to cover the amount of tuition fees that your university or college will charge you, up to a maximum of £3,375.

If you started your course before academic year 2006/07 or you were a gap year student who started your course in academic year 2006/07, your university or college can charge tuition fees up to a maximum of £1,345. You can apply for a Tuition Fee Loan to cover this cost. However, if you choose to apply for a Grant for Tuition Fees then the amount of Tuition Fee Loan you can apply for will be dependant on how much Grant for Tuition Fees you are entitled to.

If you are undertaking a course at a private university or college then you may be charged more than £3,375 for tuition fees. You can still apply for a Tuition Fee Loan up to the maximum of £3,375 if your course is one that qualifies for tuition fee support.

The Tuition Fee Loan borrowed will be paid directly to the relevant university or college once your attendance is confirmed.

### Parents' Learning Allowance (PLA) **NOT REPAYABLE**

This grant can help with course-related costs if you have dependent children. The amount you receive depends on your income and that of your dependants (including your husband, wife or partner). It is not counted by Jobcentre Plus or housing benefit departments when calculating your other benefits, so you do not have to choose between Parents' Learning Allowance and other benefits. For further information please refer to our guide 'Childcare Grant and other support for full-time student parents in higher education 2011/12'.

### Adult Dependants' Grant (ADG) **NOT REPAYABLE**

This grant can help if you have an adult who depends on you financially. You can only receive one grant even if you have more than one adult dependant. For further information please refer to our guide 'Childcare Grant and other support for full-time student parents in higher education 2011/12'.

### Travel Grant **NOT REPAYABLE**

If you have to study at a university or college outside the UK for the majority of any term in the academic year or if you have to attend a place in the UK away from your main college or university as part of your medical or dental training, you may be eligible for help with the cost of travel. You may also be able to get help to cover the cost of medical insurance, visa costs and vaccinations. The support you receive is dependent on your household income.

If you have extra travel costs because you are disabled apply for Disabled Students' Allowances instead. A 'disability' can include a long-term health condition, mental-health condition or specific learning difficulty such as dyslexia.

You will be sent further forms to complete about your travel costs.

## section 1 finance available

### Disabled Students' Allowances (DSAs) **NOT REPAYABLE**

For further information please refer to 'Bridging the Gap: A guide to the Disabled Students' Allowances (DSAs) in higher education 2011/12'.

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

If you want to apply for DSAs only, you should complete sections 2-3 of this form and return it to us. We will then send you another form that asks more specific questions about your disability/specific learning difficulty. Alternatively, if you want to send us all the details in one go you should complete a full DSA1 form instead of this form. You can download a full DSA1 application form at [www.direct.gov.co.uk/studentfinance](http://www.direct.gov.co.uk/studentfinance).

- e** If you are physically disabled or have a mental health condition, you will need to provide evidence of your condition such as a letter from your doctor or an appropriate specialist. If you have a specific learning difficulty (for example, dyslexia), you will need to provide evidence of this in the form of a diagnostic assessment carried out by a psychologist or suitably qualified specialist teacher, this will help us process your application more quickly. If you do not have this evidence yet, send this form to us now and send in the evidence of your disability, mental health condition or specific learning difficulty later. We will contact you to ask for the extra information we need.
- e** If you are taking your course by distance learning or otherwise undertaking but not attending a course in person for a reason which relates to your disability, you can apply for all types of student finance (except Travel Grant) as if you were attending in person. The evidence you send must show that you are unable to attend university or college in person for a reason which relates to your disability.

### Childcare Grant **NOT REPAYABLE**

You may get help with some of your childcare costs, depending on your income, and any income of your dependants, if you have dependent children aged under 15 at the beginning of the academic year - or under 17 if they have special educational needs - and you need childcare services for them. You may be able to get help with childcare costs during vacations as well as during term-time. Your childcare provider must be registered or approved for you to receive this grant. You cannot have this grant if you or your partner receives the childcare element of Working Tax Credit; you have to choose one or the other. For further information please refer to our guide 'Childcare Grant and other support for full-time student parents in higher education 2011/12'.

## section 1 finance available

**If you started your course in academic year 2006/07 or after (not including gap year students who started in 2006/07) you may be eligible for the following:**

### Maintenance Grant **NOT REPAYABLE**

You will not be eligible to receive a Maintenance Grant if you are eligible to receive a Special Support Grant.

The amount of Maintenance Grant you receive will affect the amount of Maintenance Loan you are entitled to and is dependent on your household income.

If you are continuing on a postgraduate or equivalent level Initial Teacher Training (ITT) course, which started **before 1 September 2009**, and choose not to provide any financial information you will be eligible to receive £1,292 Maintenance Grant (£646 for part time ITT students). If you choose to provide financial information then you may be eligible to receive up to £2,906 Maintenance Grant (£1,453 for part time ITT students).

If you are continuing on a postgraduate or equivalent level Initial Teacher Training (ITT) course, which started on or **after 1 September 2009 and before 1st September 2010**, and choose not to provide any financial information you will be eligible to receive £1,106 Maintenance Grant (£553 for part-time ITT students). If you choose to provide financial information then you may be eligible to receive up to £2,906 Maintenance Grant (£1,453 for part-time ITT students).

If you are a continuing full-time ITT student who started a course on or after 1 September 2010 you will have to provide financial information in order to receive any Maintenance Grant.

### Special Support Grant **NOT REPAYABLE**

If you are eligible to receive a Special Support Grant you will **not** be eligible to receive a Maintenance Grant.

You may be able to receive a Special Support Grant if you:

- Are a lone parent.
- Have a partner who is also a student and one or both of you is responsible for a child or young person aged under 20 who is in full-time education below higher education level.
- Have a disability, and qualify for the disability premium or severe disability premium.
- Are deaf and qualify for Disabled Students' Allowances.
- Have been treated as incapable of work for a continuous period of at least 28 weeks.
- Have a disability and qualify for income-related Employment and Support Allowance.
- Are from abroad and are entitled to an Income Support Urgent Cases Payment because you are temporarily without funds for a period of up to six weeks.
- Are waiting to go back to a course having taken agreed time out from that course due to an illness or caring responsibility that has now ended.
- Are aged 60 or over.

**e Please state on a separate piece of paper which of the above categories you think you may fall into and enclose this, and relevant supporting evidence, with the PR1 form.**

The Special Support Grant pays up to £2,906, depending on your household income, and is intended to help with additional course related costs such as books, equipment, travel or childcare. Entitlement is calculated in the same way as the Maintenance Grant but will not affect the amount of Maintenance Loan you may be entitled to receive. Jobcentre Plus or your local authority's Housing Benefit section will not take account of the Special Support Grant when assessing any claim you make for income related benefits.

If you are unsure about your eligibility for a Special Support Grant, call us for help.

## section 1 finance available

### Bursaries and Scholarships **NOT REPAYABLE**

Universities and colleges in England, Wales and Northern Ireland must offer you a mandatory bursary if you are assessed as being eligible to receive either the full Maintenance Grant or full Special Support Grant and the university or college is charging the maximum variable or flexible fee rate.

Some universities and colleges may choose to offer discretionary bursaries or scholarships. The amount offered would be at their discretion and you may not need to be eligible for the full Maintenance Grant or the full Special Support Grant to qualify for their bursary or scholarship scheme.

**If you started your course in academic year 2005/06 or before (including gap year students who started in 2006/07) you may be eligible for the following:**

### Grant for Tuition Fees **NOT REPAYABLE**

You may not be eligible for a Grant for Tuition Fees if you already hold a UK honours degree unless you are taking a particular vocational degree.

If you are assessed as having to pay a contribution towards your tuition fees then you can apply for a Tuition Fee Loan to cover this assessed contribution, up to a maximum of £1,345.

If you are studying at a private university or college, you are **not** eligible for a Grant for Tuition Fees, unless you are continuing your studies which started before September 2006, in which case you may be eligible for a Grant for Tuition Fees which is non-income assessed.

If you are entitled to any of this grant it will be paid directly to your university or college.

### Higher Education (HE) Grant **NOT REPAYABLE**

There is up to £1,000 HE Grant available depending on your household income. It is not counted by Jobcentre Plus when calculating your other benefits. If you are continuing on a course at a private university or college which you started prior to academic year 2006/07 and this is your first application for student finance, you may be entitled to receive an HE Grant.



If you are still having difficulty choosing which types of financial support you wish to apply for, please refer to the following sources for further information:

- **A guide to financial support for higher education students in 2011/12**
- **Student Loans: A guide to terms and conditions**
- **Bridging the Gap: A guide to the Disabled Students' Allowances (DSAs) in higher education 2011/12**
- **Childcare Grant and other support for full-time student parents in higher education 2011/12**

Booklets and application forms are available online at **[www.direct.gov.uk/studentfinance](http://www.direct.gov.uk/studentfinance)**.

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](mailto: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.

section

2

## section 2 personal details

### b Contact details

If you provide a term-time correspondence address then all correspondence we issue will be sent to that address from the date you move there.

### c Marital status

You are 'living with a partner' if you are sharing a home with your partner but you are not married or in a civil partnership. It does not matter whether you are of the same sex or of opposite sex.

**e** If you will be under 25 at the start of the academic year, and you are married or in a civil partnership, please send your original marriage certificate or civil partnership documentation with your application. Your document will be returned to you.

**e** If you are separated or divorced, or if you have been in a civil partnership which has been dissolved, you should send a copy of the decree absolute, dissolution order, or a letter from your solicitor confirming your status. Your document will be returned to you.

**e** If you are widowed or a surviving civil partner, please send the original death certificate.

section

3

## section 3 about your course and university or college

### f Full-time postgraduate Initial Teacher Training (ITT)

A full-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 two. Students starting a part-time undergraduate ITT course in academic year 2011/12 should apply for part-time student finance.

## section 3 about your course and university or college

### Full-time distance learning

- e** If you are studying on a full-time distance learning course for a reason relating to a disability you must send evidence that clearly shows you are unable to attend university or college in person for a reason which relates to your disability.

### Other course types

Full-time fee and maintenance support for flexible postgraduate ITT, part-time undergraduate ITT and part-time ITT courses (excluding first degrees) are only available to students who:

- started their course before 1st September 2010 or;
- transferred onto these courses on or after 1st September 2010 from ITT courses that started before 1st September 2010.

- e** You must provide a letter from your university or college confirming the number of weeks you will be on full-time study and full-time teaching practice during academic year 2011/12.

### Part-time ITT (excluding first degrees)

If you started your part-time ITT course on or after 1st September 2010 and are continuing your course in 2011/12 you need to complete the part-time PTG1 application form.

A part-time undergraduate ITT course is a first degree course. If you are applying for support for a part-time PGCE, part-time Certificate in Education (CertEd) or part-time Diploma in Teaching in the Lifelong Learning Sector (DTLLS) or equivalent course, please tick the 'Part-time ITT' box if your course started before 1st September 2010.

- g** Please send the official letter indicating that you have been offered a state-funded place on a dance and drama course at a privately funded institution.

- e**

- h** 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 NHS or the DoH.

If you are eligible to apply for an **income assessed** bursary or award, the only element of student finance you are eligible to apply for is the non-income assessed part of the Maintenance Loan and this will be at a reduced rate.

If you are eligible to apply for a **non-income assessed** bursary then you are **not** eligible for any other 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 NHS Pensions Agency Student Grants Unit on 0845 358 6655.

- i** If your placement is an unpaid placement that is not listed then you will only be entitled to a reduced rate Maintenance Loan.

## section 4 your UK bank or building society account details

You do not need to provide your bank or building society account details if you are only applying for a Tuition Fee Loan because this will be paid directly to your university or college and not to you.

## loan request section

### 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.
- 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 National Insurance Number box blank. You will be contacted if you need to take any action to obtain a National Insurance Number.

### Maintenance Loan

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

### Tuition Fee Loan

This loan is paid directly to your university or college once they confirm your attendance on the course.

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

You can apply for a Maintenance Loan or a Tuition Fee Loan at 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 a Tuition Fee Loan, or change the amount you originally requested at [www.direct.gov.uk/studentfinance](http://www.direct.gov.uk/studentfinance).

section

# 5

## section 5 dependent and independent students

**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.

**e** Please send the child's/children's original birth certificate(s) and evidence that you have care of the child, for example, evidence that you are receiving Child Benefit or Child Tax Credit.

### **b** Irreconcilable estrangement

You will normally only be considered irreconcilably estranged from your parents if you have had no contact with them for at least a year prior to the start of your academic year.

You will not be able to claim irreconcilable estrangement just 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.



## section 6 student financial questions

### a Unearned income

You will 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 any of the following:

- **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 6d;
- Teacher Training Bursaries;
- Higher Education Bursary (for care leavers);
- bounties paid by the armed services to reservists or disablement or invalidity pensions; or
- ISAs.

### b Payments from an employer

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 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.

### d Dependent children

You must include any income the child receives from working, from interest earned on savings, from investments and any maintenance payments you expect to receive for your children as part of **their** income in this question.

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 or 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 in the guide 'Higher education student finance – How you are assessed and paid'.

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

- e** You must send your child's/children's original birth certificate(s) to confirm their date(s) of birth before they can be taken into account when assessing your entitlement. If you have provided these with a previous application for financial support then you do not need to provide them again.

## section 7 Parents' Learning Allowance, Adult Dependants' Grant and Childcare Grant

- d** Fostering or boarding out allowances are regular payments that foster carers receive to meet the costs of keeping a child.
- e** Financial commitments to include would be insurance policies such as household or medical insurance, life assurance premiums, mortgage repayments, repayments under a loan agreement such as a Building Society home improvement loan, or maintenance payments for a dependant. You need to provide **copies** of your financial documents as evidence of any obligations you declare.
- All copies that you send to us will be securely destroyed once we have checked them. **Do not send us any original financial documents instead of copies because they will also be destroyed.**
- f** If you apply for Childcare Grant or you choose to receive Childcare Grant instead of the childcare element of Working Tax Credit you will be sent a further form to complete and an information booklet outlining the amount of Childcare Grant available. You can get information on all aspects of Working Tax Credit from HM Revenue & Customs (HMRC) helpline on 0845 300 3900.

## section 8 about your family

### a Independent students

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

If you entered higher education **on or after 1 September 2005**, your partner is defined as:

- Your husband, wife or civil partner.
- Your opposite or same sex partner, if you are 25 or over and you live with your partner as though you were married or in a civil partnership.

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

### 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.

If you entered higher education **on or after 1 September 2005**, 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.

If you entered higher education **on or after 1 September 2004 but before 1 September 2005** your parent's partner is defined as:

- Your stepmother or stepfather; or
- Your parent's opposite sex partner if they live together as though they were married.

- c** If your parents are divorced or separated, or if they have been in a civil partnership which has been dissolved, you should send a copy of the decree absolute, dissolution order, or a letter from their solicitor confirming their status. We may be able to accept other evidence of separation - contact us for more information.

## Student Declaration

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

## Data Protection

The Student Loans Company (SLC) is a Data Controller under the Data Protection Act 1998.

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. The Secretary of State for Business, Innovation and Skills is a joint Data Controller for your information.

If false or inaccurate information is provided and fraud is identified, details may be passed to fraud prevention agencies to prevent fraud and money laundering.

We may share the information you have given us with other organisations including the Department for Business, Innovation and Skills, other Government bodies and with your university or college for these purposes. We may also get information about you from other organisations. If so, it will only be for the purposes described and as the law permits us to do.

For more detailed information about how your application will be processed and with whom your information will be shared and for what purpose, go to **[www.direct.gov.uk/studentfinance-dataprotection](http://www.direct.gov.uk/studentfinance-dataprotection)**.

## Changes of circumstance

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

The most common changes of circumstance for students would be if:

- you are absent from the course for more than 60 days because of illness;
- you are absent for any other reason;
- you leave, abandon or are expelled from the course;
- you stop attending 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 full-time to a part-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.

The quickest and easiest way to tell us about any changes you've had to your name or address, your course or university or even your course fee amount is online. Just log into your account at **[www.direct.gov.uk/studentfinance](http://www.direct.gov.uk/studentfinance)**.

## Information about data sharing for bursary and scholarship purposes

Universities and colleges will be offering financial awards such as bursaries or scholarships to their students. To help them administer these awards (i.e. to determine eligibility and entitlement to, and if relevant pay, a bursary or scholarship - 'bursary administration purposes') they will ask the Secretary of State or the Student Loans Company for access to information you provide in connection with this application for student finance (whether on this form or at a later date).

We will share the relevant information with them, unless you indicate that you do not wish us to do so by ticking the box on the declaration. If you **do not** give consent for us to share this information, the payment of any bursary or scholarship to which you may be entitled will be delayed.

Please contact the university or college if you require further information about their bursaries and scholarships.

## section 9 financial details for the tax year 2009-10 for parents and partners

### What happens if my household income has changed since tax year 2009-10?

If your total household income (before tax) for the tax year 2011-12 will be at least 15% less than it was in tax year 2009-10, still complete this section as well as completing a 'Current Year Income Assessment Form'.

You can download this form at [www.direct.gov.uk/studentfinance](http://www.direct.gov.uk/studentfinance) and return it with this application or contact us on 0845 300 5090 to have one sent to you.



Please note that a current year income assessment cannot be carried out unless you provide your financial details for the 2009-10 tax year.

### Part B - Data sharing and you

We will check the financial information that you provide with HM Revenue & Customs. This information will be kept securely and held strictly under the provisions of the Data Protection Act.

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 HM Revenue and Customs in order to obtain accurate financial information about you.

### Part C - Your financial information

Please give financial information for the tax year 2009-10. Normally, this is the year ending 5 April 2010, 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.

### Q3 Income from salary, wages, taxable state benefits or from occupational or private pensions

#### a Total income from salary / wages

If as part of your salary or wages for the tax year 2009-10 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. If you declared this type of income to HM Revenue and Customs you would have done so by completing Box 3 on Page E1 for the 2009-10 SA102 (Employment) Form.

#### b Taxable state benefits

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
- Jobseekers Allowance
- Statutory Adoption Pay
- Statutory Maternity Pay
- Statutory Paternity Pay
- Statutory Sick Pay
- Widowed Parent's Allowance

## section 9 financial details for the tax year 2009-10 for parents and partners

### Q4 Income from a state retirement pension

#### If you are Self Assessed

##### Online tax return

You would have been asked what your state retirement pension income amounts were as part of your self-assessment. You should refer to your saved online tax return for these income figures.

##### Paper tax return

The locations of where to find these income types on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 4.1 (non-lump sum amount only – if you completed an SA200 you would not have had a lump sum pension payment)

Full paper tax return - SA100 TR3 Box 7, SA100 TR3 Box 8

### Q5 Income from savings and investments

To make this question easier to answer, we have split it up 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 the 2009-10 tax year, 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):

Taxed UK interest etc. (the net amount after tax has been taken off) + untaxed UK interest (amounts that have not been taxed)

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

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

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 5.1 plus Box 5.2

Full paper tax return - SA100 TR3 Box 1 plus Box 2

## section 9 financial details for the tax year 2009-10 for parents and partners

### b Income from UK life insurance gains, securities and unit trusts

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 ISA's  
Your share of taxed interest etc.  
Total untaxed savings income taxable at 20%  
Taxed income taxable at 10%  
Taxed income taxable at 20%

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from UK life insurance gains, securities and unit trusts.

Full paper tax return - SA101 Ai1 Box 3, SA101 Ai1 Box 4, SA101 Ai1 Box 6, SA101 Ai1 Box 8, SA104S Box 26, SA104F Box 33, SA104F Box 69, SA104F Box 72

### 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

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 5.3

Full paper tax return - SA100 TR3 Box 3, SA100 TR3 Box 4, SA101 Ai1 Box 12, SA101 Ai1 Box 13, SA101 Ai2 Box 1



## section 9 financial details for the tax year 2009-10 for parents and partners

### 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 (up to £300)

Interest and other income from overseas savings

Dividends from foreign companies

Dividend income received by a person overseas

### If you are Self Assessed

#### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

#### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from foreign investments and dividends.

Full paper tax return - SA100 TR3 Box 5, SA106 F3 Box 4, SA106 F3 Box 6, SA106 F3 Box 11

## section 9 financial details for the tax year 2009-10 for parents and partners

### Q6 Income from taxable benefits in kind

#### Original 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 the 2009-10 tax year. Add together all the benefits in kind you received and write your total figure on the form.

Benefit in kind	Where to find amount on your P11D
Assets transferred or placed at employees disposal (cars, property, goods or other assets)	(Section A) Box 13
Payments made on behalf of employee	(Section B) Box 15 (Total sum of both boxes)
Vouchers and credit cards	(Section C) Box 12
Living accommodation	(Section D) Box 14
Mileage allowance and passenger payments	(Section E) Box 12
Total cash equivalent of all cars/vans made available	(Section F) Box 9 plus (Section G) Box 9
Total cash equivalent of fuel for all cars/vans made available	(Section F) Box 10 plus (Section G) Box 10
Cash equivalent of loans after deducting any interest paid by the borrower	(Section H) Box 15
Private medical treatment or insurance	(Section I) Box 11
Qualifying relocation expenses payments and benefits	(Section J) Box 15
Services supplied	(Section K) Box 15
Assets placed at employees disposal	(Section L) Box 13
Other items (including subscriptions and professional fees)	(Section M) Box 15 (Total sum of all boxes)
Expenses payments made to, or on behalf of, the employee	(Section N) Box 16 (Total sum of all boxes)

## section 9 financial details for the tax year 2009-10 for parents and partners

### Part C – Other income

#### Q1 Income from self-employment

To make this question easier to answer, we have split it up 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 taxable profit from businesses

You should include the income type below as your answer for the total amount of taxable profits you received from self-employment during the 2009-10 tax year.

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

##### If you are Self Assessed

###### Online tax return

You would have been asked this question as part of your assessment. You should refer to your saved online tax return for these figures.

###### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) and how to work this amount out are detailed below:

Short paper tax return - SA200 Box 3.6 plus Box 3.10

Full paper tax return - SA103F (Box 72 plus Box 74) or SA103S (Box 27 plus Box 29) or SA103L (Box 49 minus Box 50)

##### b. Total taxable profit from partnerships

You should include the income type(s) below as your answer for the total profit you received from partnerships during the 2009-10 tax year.

Share of total taxed and untaxed income other than that taxable at 10% and 20%

Your share of total taxable profit from the partnerships

##### If you are Self Assessed

###### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

###### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) and how to work this amount out are detailed below:

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

Full paper tax return - SA104F (Box 14 plus Box 17 plus Box 66 plus Box 73 minus Box 74), SA104S (Box 14 plus Box 17)

## section 9 financial details for the tax year 2009-10 for parents and partners

### Q2 Minister of religion

Tell us about the amount of income you received from the following income type during the 2009-10 tax year:

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

#### If you are Self Assessed

##### Online tax return

You would have been asked this question as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed SA102M tax form and how to work this amount out are detailed below:

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

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

### Q3 Other 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 the 2009-10 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.

Other taxable income - before expenses and tax taken off

Foreign earnings not taxable in the UK

Taxable lump sums, excluding redundancy and compensation for loss of job

Lump sums or benefits received from an Employer Financed Retirements Benefit Scheme excluding pensions

Redundancy and other lump sums and compensation payments

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 7.1

Full paper tax return - SA100 TR3 Box 16, SA101 Ai2 Box 12, SA101 Ai2 Box 3, SA101 Ai2 Box 4, SA101 Ai2 Box 5

## section 9 financial details for the tax year 2009-10 for parents and partners

### 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 2009-10 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

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 6.3

Full paper tax return - SA105 Box 36, SA106 Box 25

### 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 the 2009-10 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.

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

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed SA107 tax form and how to work out these amounts are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from UK trusts.

Full paper tax return - SA107 Box 1, SA107 Box 2, SA107 Box 3, SA107 Box 4, SA107 Box 5, SA107 total sum of (Boxes 7 to 14), SA107 total sum of (Boxes 16 to 21), SA107 Box 22

## section 9 financial details for the tax year 2009-10 for parents and partners

### 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 the 2009-10 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.

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)

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed SA106 tax form are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any foreign income.

Full paper tax return - SA106 F3 Box 9, SA106 F3 Box 13, SA106 F6 Box 41, SA106 F6 Box 42, SA106 F6 Box 43

### Q7 Income from an overseas pension

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 the 2009-10 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.

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)

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed SA101 tax form are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from an overseas pension.

Full paper tax return - SA101 Ai4 Box 5, SA101 Ai4 Box 10, SA101 Ai4 Box 11, SA101 Ai4 Box 13, SA101 Ai4 Box 14



## section 9 financial details for the tax year 2009-10 for parents and partners

### 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 the 2009-10 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.

Amount of omissions (exemptions under transfer of foreign assets)

#### If you are Self Assessed

##### Online tax return

You would have been asked this question as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The location of where to find this figure on your completed SA106 tax form is detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from other overseas income and gains.

Full paper tax return - SA106 F6 Box 46

## section 9 financial details for the tax year 2009-10 for parents and partners

### Part D - Income deductions

#### 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 had during the 2009-10 tax year 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  
Seafarers' Earnings Deduction  
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 allowances

#### If you are Self Assessed

##### Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

##### Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 2.5

Full paper tax return - SA100 TR3 Box 17, SA101 Ai2 Box 11, SA101 Ai2 Box 13,  
SA102 E1 Box 17, SA102 E1 Box 18, SA102 E1 Box 19, SA102 E1 Box 20

### Part E - Your dependants

#### Academic year

You should provide the child dependants' income for the academic year. The academic year is determined by when the student begins their study.

##### Student's study begins between:

1 August 2011 and 31 December 2011 inclusive  
1 January 2012 and 31 March 2012 inclusive  
1 April 2012 and 30 June 2012 inclusive  
1 July 2012 and 31 July 2012 inclusive

##### Academic year

1 September 2011 to 31 August 2012  
1 January 2012 to 31 December 2012  
1 April 2012 to 31 March 2013  
1 July 2012 to 30 June 2013

**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 in the booklet 'Higher education student finance - How you are assessed and paid' which you can download from [www.direct.gov.uk/studentfinance](http://www.direct.gov.uk/studentfinance).

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

## Declaration for parents and partners

If any person(s) named in section 9 cannot sign the form it must be signed on their behalf by their Power of Attorney. The Power of Attorney letter must be sent with the application before a signature from that Power of Attorney will be accepted.

### Data Protection Act 1998

The Student Loans Company (SLC) is a Data Controller under the Data Protection Act 1998.

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. The Secretary of State for Business, Innovation and Skills is a joint Data Controller for your information.

If false or inaccurate information is provided and fraud is identified, details may be passed to fraud prevention agencies to prevent fraud and money laundering.

We may share the information you have given us with other organisations including the Department for Business, Innovation and Skills, other Government bodies and with your university or college for these purposes. We may also get information about you from other organisations. If so, it will only be for the purposes described and as the law permits us to do.

For more detailed information about with whom your information will be shared and for what purpose, go to **[www.direct.gov.uk/studentfinance-dataprotection](http://www.direct.gov.uk/studentfinance-dataprotection)**.

### 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 change of circumstance would be if:

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

### Information about data sharing for bursary and scholarship purposes

Universities and colleges will be offering financial awards such as bursaries or scholarships to their students. To help them administer these awards (i.e. to determine eligibility and entitlement to, and if relevant pay, a bursary or scholarship - 'bursary administration purposes') they will ask the Secretary of State or Student Loans Company for access to information you provide in connection with any application for student finance for academic year 2011/12 (whether on this form or at a later date).

We will share the relevant information with them, unless you indicate that you do not wish us to do so by ticking the box on the declaration. If you do not give consent for us to share this information, the payment of any bursary or scholarship to which the student(s) you are supporting may be entitled will be delayed.