

Notes to help you complete your **Application for Student Finance** 2011/12



www.direct.gov.uk/studentfinance

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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.

Any original evidence you send with your application form will be returned to you as soon as possible.

Who should complete the application form?

A student studying:

- A full-time course of higher education.
- A full-time sandwich course of higher education.
- A full-time Initial Teacher Training (ITT) course.
- A full-time distance learning course for a reason relating to a disability.
- A diploma or degree course in a health-related discipline who is eligible to apply for an income-assessed bursary from the National Health Service or Department of Health.

If you are not studying one of these types of course you should not complete this form.

Where can I find more information about student finance?

Visit www.direct.gov.uk/studentfinance

You can also find more information in the following guides:

- A guide to financial support for higher education 2011/12 for new full-time students.
- Higher education student finance: How you are assessed and paid.
- Student loans: A guide to terms and conditions.
- Bridging the gap: A guide to the Disabled Students' Allowances (DSAs) in higher education.
- Childcare Grant and other support for full-time student parents in higher education.

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.direct.gov.uk/studentfinance

Call us on **0845 300 5090** or by **textphone** on **0845 604 4434**

section 1 finance available

Special Support Grant

You may be eligible for this 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.

Childcare Grant

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. Your childcare provider must be registered or approved for you to receive this grant.

Disabled Students' Allowances (DSAs)

For further information please refer to 'Bridging the gap: A guide to the Disabled Students' Allowances (DSAs) in higher education' available at **www.direct.gov.uk/studentfinance**.

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 2-5 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 DSA1 form. You can download a DSA1 application form at www.direct.gov.uk/dsas.

Evidence C

Evidorioo	
Evidence of	Evidence item required
Eligibility for Special Support Grant	Specific evidence to show you fall into one of the categories listed as part of the Special Support Grant notes at the top of this page.

section 2 personal details

Identity evidence details

b If your UK passport has **expired** you **must** send your original birth or adoption certificate together with a completed Birth/Adoption Certificate form.

Previous loans

c If you are behind with repayments on a previous loan, you should not apply for student finance until you have resolved this issue.

If you have any mortgage style loans please call 0845 073 8896 for advice.

If you have any Income Contingent Repayment (ICR) loans, please call 0845 073 8891 for advice.

Contact details

e 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.

Evidence

Evidence	_ 		
Question	Evidence of	Evidence item required	
b	Identity	 Non-UK passport. Original birth or adoption certificate and a completed Birth/Adoption Certificate form. 	
		The Birth/Adoption Certificate form is available from www.direct.gov.uk/studentfinance or by contacting us on 0845 300 5090.	
	Name change Required if your name has changed from that which appears on your birth certificate or passport.	 Change of name deed. Marriage/divorce certificate. Civil partnership/dissolution certificate. 	
f	Date of marriage or civil partnership if you will be under 25 at the start of the academic year	 Original marriage certificate. Original civil partnership documentation. 	
	Separated, divorced or dissolved civil partnership	 Decree absolute. Dissolution order. A letter from your solicitor confirming your status. 	
	Widowed or surviving civil partner	Original death certificate.	

section 3 residence

Nationality

a1 If you have provided your UK passport information or birth certificate as part of section 2, you do not need to send any further evidence of your UK nationality.

Residence status

a4 If your child, son or daughter-in-law or child's civil partner is the worker you must be dependant on them.

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

a5 '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 a right of 'permanent residence' in the UK.
- You have been granted 'indefinite leave to remain'.
- You have a right of abode in the UK.

Further information about the right of permanent residence and other immigration issues can be obtained from the UK Border Agency at the Home Office at www.ukba.homeoffice.gov.uk.

a6 Refugee status

If you or your:

- husband, wife, civil partner
- 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).

a7 Humanitarian Protection

If you or your:

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

have been granted 'Humanitarian Protection' as the result of an unsuccessful asylum application, 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 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.

Residence history

b2 Date study begins between

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

Date academic year begins

1 September 2011 1 January 2012 1 April 2012

1 July 2012

Evidence E



LVIdence —		
Question	Evidence of	Evidence item required
a1	UK nationality	 If you have provided your adoption certificate as part of section 2, you must provide your UK passport or birth certificate to prove your 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 or a letter or other document.

SFF/PN1N/1112

Question	Evidence of	Evidence item required
a2	EU nationality	 Passport or national identity card.
a3	Parent's Swiss nationality and your relationship to them	 Your parent's passport or national identity card (if these show proof of their Swiss nationality and your relationship to them).
a4	European Economic Area (EEA) or Swiss nationality	 Passport or national identity card.
	Employment of the EEA or Swiss national who is working, has worked or is looking for work in the UK	 Send one of the following: A P60 or a letter from employer if currently working. Audited accounts, tax returns or details of income if self-employed. A letter from employer confirming the intention to continue working whilst studying. P45, P60 or letter from previous employer if currently looking for work or previously worked in the UK.
a5	Settled status	 UK passport or a letter from the Home Office which confirms immigration status.
a 6	Refugee status Relationship to person holding refugee status if it is not you	 A Home Office letter and an immigration status document, normally a passport. Evidence to confirm your relationship to the person who has been granted refugee
		status.
a 7	Humanitarian Protection	 A Home Office letter and an immigration status document, normally a passport.
	Relationship to person holding Humanitarian Protection status if it is not you	 Evidence to confirm your relationship to the person who has been granted Humanitarian Protection status.

section 4 about your course and your university/college

Course details

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

Course type

c 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 parttime undergraduate ITT course in academic year 2011/12 should apply for part-time student finance.

Evidence e



Question	Evidence of	Evidence item required
C	Distance learning for a reason related to a disability	 Evidence that clearly shows you are unable to attend university or college in person for a reason which relates to your disability.
d	State-funded place on a dance and drama course	Official letter confirming your place on the course.

section 5 previous study and other information

Previous study

- **a1** 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, HND and Foundation Degree, and similar courses from outside the UK.
 - Integrated Masters Degrees.

This does not include any stand-alone postgraduate qualifications (e.g PgDip, MA, MSc, MBA or equivalents).

- **a3** If you are unsure of the level of your existing qualification, please contact your university or college where you completed the course, they may be able to help.
- **a4** A self-funded course is one that was studied at a private university or college and no support of any kind was paid either to you or the university or college to meet tuition fee or maintenance costs for the duration of the course.

Other information

b 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 - 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.

Evidence

Question	Evidence of	Evidence item required
a4	Compelling personal reasons for not achieving a qualification	• Evidence that supports the reasons you have given.

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 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.**

section 7 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.

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.

- 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 e

Question	Evidence of	Evidence item required
a3	Care of a child	 The child's/children's original birth certificates and evidence that you have care of the child, for example, evidence that you are receiving Child Benefit or Child Tax Credit.
С	Supporting yourself financially	• A copy of your P60s or benefit information.

section 8 student financial questions

The academic year is determined by when you begin your study, see page 30 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 8d;
- 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

b 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.

Dependent children

d 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 booklet '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.

Evidence e

Question	Evidence of	Evidence item required
d	Date of birth of any children	 Child's/children's original birth certificate(s).

section 9 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.
- 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 the HM Revenue & Customs (HMRC) helpline on 0845 300 3900.

Evidence e

Question	Evidence of	Copy evidence item required
e	Financial commitments	 Copied documentary evidence of any financial commitments 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.

section 10 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.

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.

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.

Evidence	e
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Question	Evidence of	Evidence item required
b	Parent's marital status if they are separated, divorced or they have had their civil partnership dissolved	 Decree absolute. Dissolution order. A letter from their solicitor confirming their status.

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.

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 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.

Student Declaration

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 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 11

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** 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.

section 11 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.

section 11 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

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

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%

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

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

O6 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 11 Part D - 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

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)

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, and that's ok, 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

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, and that's ok, just tell us about the ones you did.

Income from UK property
Income from foreign property or land

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, and that's ok, 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

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

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)

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

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 11 Part E - 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 have had during the 2009-10 tax year and tell us your total figure on the form. You may not 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

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

section 11 Part F - 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: Academic year 1 August 2011 and 31 December 2011 inclusive 1 January 2012 and 31 March 2012 inclusive 1 January 2012 to 31 December 2012 1 April 2012 and 30 June 2012 inclusive 1 April 2012 to 31 March 2013 1 July 2012 and 31 July 2012 inclusive 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.

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 11 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

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**.

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.

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 11/12 (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.