

# Notes to help you complete your Application for Student Finance

# 2010/11



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 expects to receive 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 2010/11 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 also get Braille, large-print and audio versions of all forms and guides by calling us on **0845 300 50 90** or by textphone on **0845 604 4434**.

### How can I contact you?

Visit www.direct.gov.uk/studentfinance

Call us on 0845 300 50 90

#### 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)

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 full DSA1 form instead of this form. You can download a full DSA1 application form at www.direct.gov.co.uk/studentfinance.

# Evidence e

Evidence of	Evidence item required		
Eligibility for Special Support Grant	Specific evidence to show you fall into one of the categories listed as part 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		- 11 · 12 · 1 · 1
Question	Evidence of	Evidence item required
b	Identity	<ul> <li>Non-UK passport.</li> <li>Original birth or adoption certificate and a completed Birth/Adoption Certificate form.</li> </ul>
		The Birth/Adoption Certificate form is available from www.direct.gov.uk/studentfinance or by contacting us on 0845 300 50 90.
	Name change Required if your name has changed from that which appears on your birth certificate or passport.	<ul> <li>Change of name deed.</li> <li>Marriage/divorce certificate.</li> <li>Civil partnership/dissolution certificate.</li> </ul>
f	Date of marriage or civil partnership if you will be under 25 at the start of the academic year	<ul> <li>Original marriage certificate.</li> <li>Original civil partnership documentation.</li> </ul>
	Separated, divorced or dissolved civil partnership	<ul> <li>Decree absolute.</li> <li>Dissolution order.</li> <li>A letter from your solicitor confirming your status.</li> </ul>
	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 dependent on them.
- **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; or
- parent(s), step-parent; or
- parent's or step-parent's husband, wife or civil partner

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; or
- parent's or step-parent's husband, wife or civil partner

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

#### a7 Leave to enter or remain

If you or your:

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

have been granted 'leave to enter or remain' in the UK 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 leave to enter or remain, 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 leave to enter or remain, 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 2010 until 31 December 2010 inclusive 1 January 2011 until 31 March 2011 inclusive 1 April 2011 until 30 June 2011 inclusive 1 July 2011 until 31 July 2011 inclusive

### Date academic year begins

1 September 20101 January 20111 April 20111 July 2011

# Evidence

Question	Evidence of	Evidence item required
a1	UK nationality	<ul> <li>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.</li> <li>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.</li> </ul>

Question	Evidence of	Evidence item required
a2	EU nationality	<ul> <li>Passport or national identity card.</li> </ul>
a3	Parent's Swiss nationality and your relationship to them	<ul> <li>Your parent's passport or national identity card (if these show proof of their Swiss nationality and your relationship to them).</li> </ul>
a4	European Economic Area (EEA) or Swiss nationality	<ul> <li>Passport or national identity card.</li> </ul>
	Employment of the EEA or Swiss national who is working, has worked or is looking for work in the UK	<ul> <li>Send one of the following:</li> <li>A P60 or a letter from employer if currently working.</li> <li>Audited accounts, tax returns or details of income if self-employed.</li> <li>A letter from employer confirming the intention to continue working whilst studying.</li> <li>P45, P60 or letter from previous employer if currently looking for work or previously worked in the UK.</li> </ul>
a5	Settled status	<ul> <li>UK passport or a letter from the Home Office which confirms immigration status.</li> </ul>
<b>a6</b>	Refugee status  Relationship to person holding	<ul> <li>A Home Office letter and an immigration status document, normally a passport.</li> <li>Evidence to confirm your</li> </ul>
	refugee status if it is not you	relationship to the person who has been granted refugee status.
a7	Leave to enter or remain	<ul> <li>A Home Office letter and an immigration status document, normally a passport.</li> </ul>
	Relationship to person holding leave to enter or remain status if it is not you	<ul> <li>Evidence to confirm your relationship to the person who has been granted leave to enter or remain status.</li> </ul>

## section 4 about your course and your university/college

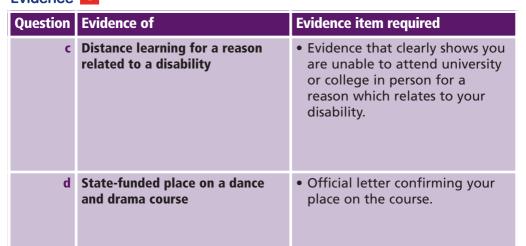
#### Course details

**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 part-time undergraduate ITT course in academic year 2010/11 should apply for part-time student finance.

# Evidence



### section 5 previous study and other information

# **Previous study**

- a1 This includes any undergraduate 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 have applied, or will be applying, 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 receiving or are likely to receive 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 receiving or are likely to receive a **non-income assessed** bursary then you are NOT eligible for any other student finance unless 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:

- 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.

To apply for a Maintenance Loan or a Tuition Fee Loan, or to change the amount you originally requested, you can download a Maintenance Loan or Tuition Fee Loan Request form at <a href="https://www.direct.gov.uk/studentfinance">www.direct.gov.uk/studentfinance</a> or contact us on **0845 300 50 90** to have one sent to you.

# 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	<ul> <li>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.</li> </ul>
C	Supporting yourself financially	• P60s or benefit information.

# section 8 student financial questions

#### 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	<ul> <li>Child's/children's original birth certificate(s).</li> </ul>

# 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 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

Question	Evidence of	Evidence item required
е	Financial commitments	• Documentary evidence of any financial commitments you declare.

### section 10 about your family

#### 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.

Evidence	e

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

#### **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.

#### 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 Part B - Data sharing and you

Any information that we receive about you is 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 but it is shown on any evidence you provide us in support of an application, we may use this information and share it with the HM Revenue and Customs in order to obtain accurate financial information about you.

#### section 11 Part C - Your financial information

Please give evidence for the tax year 2008-09. Normally, this is the year ending 5 April 2009, 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.

### What if my income is less in tax year 2010-11 than it was in tax year 2008-09?

If the total income for your household (before tax) for the tax year 2010-11 will be at least 15% less than it was in tax year 2008-09, still complete this section.

From April 2010, it may be possible for the financial assessment to be calculated using the expected total income for your household in the financial year 2010-11 - a 'current year income assessment'.

- If you are completing this form before April 2010, please give brief details of the expected reduction in income on a separate piece of paper and enclose it with this form. We will then contact you for further information when we can fully assess your household's financial circumstances.
- If you are completing this form after April 2010, you can download a 'Current Year Income Assessment' form from www.direct.gov.uk/studentfinance and return it with this application or contact us on 0845 300 50 90 to have one sent to you.



Please note that a 'current year income assessment' cannot be carried out unless you also provide your financial details for the 2008-09 tax year.

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

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
Total salary or wages for the year:	£	£	P60 – Pay and income details box
Income from taxable state benefits:	£	£	P60 - Pay and income details box
Occupational Pension:	£	£	P60 - Pay and income details box
Tips and other payments not on P60:	£	£	SA102 E1 Box 3
Directors salary or wages:	£	£	P60 - Pay and income details box
Total income received:	£	£	Write this total figure on the application.

# Evidence 😑

Please send any of the following:

• Month 12 Wageslip • O

Original P60

• Original P60U • Week 53 Wageslip

# **Q4** Income from Self-employment

Income showing on your SA103 and/or SA200 documents

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
Total taxable profits from this business (aggregated for multiple Self-employments):	£	£	SA103F Box 72 + Box 74 SA103L Box 51 minus Box 52 SA103S Box 27 + Box 29
Profit (Self-employment):	£	£	SA200 Box 3.10
Business start up allowance:	£	£	SA200 Box 3.6
Total Self-employment income from SA103 and SA200:	£	£	Write this total figure on the application.

Evidence e

Please send your Self Assessed Tax Return

# **Income from Self-employment**

Income stated on SA104 document

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
Share of total taxed and untaxed income other than that taxable at 10% and 20%:	£	f	SA104F Box 14 + Box 17 + Box 66 + Box 73 minus box 74
Your share of total taxable profit from partnerships:	£	£	SA104S Box 14 + 17
Total Self-employment income from your SA104 document:	£	f	Write this total figure on the application.

# Evidence e

Please send your Self Assessed Tax Return

# **Q5** Income from a State Retirement Pension

Non-lump sum

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
State Retirement Pension (non-lump sum):	f Write this total figure on the application.	f Write this total figure on the application.	SA100 TR3 Box 7 or SA200 Box 4.1

# Evidence 😑

Please send any of the following:

- Original BR735
- Pension Book
- Self Assessed Tax Return
- Confirmation from the Department of Work and Pensions (DWP)
- Confirmation from the Benefits Agency

#### **Income from a State Retirement Pension**

Lump sum

7 I		Person 2 Amount (£)	Where to find amount
State Retirement Pension (lump sum):	f Write this total figure on the application.	f Write this total figure on the application.	SA100 Box 8

# Evidence 😑

Please send any of the following:

- Original BR735
- Pension Book
- Self Assessed Tax Return
- Confirmation from the Department of Work and Pensions (DWP)
- Confirmation from the Benefits Agency

# **Q6** Minister of religion

		Person 2 Amount (£)	Where to find amount
Total taxable income minus expenses not included in your P60 or P11D:	f Write this total figure on the application.	f Write this total figure on the application.	SA102M Box 4 + Box 8 + Box 10 minus (Box 26 + Box 35)

# Evidence 👝

Please send your Self Assessed Tax Return

# **Q7** Income from savings and investments

Total income showing on your SA100 and SA200 documents or on your bank statements/letters if you were not Self Assessed (SA).

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
Dividends from UK companies:	f	£	SA100 TR3 Box 3 (Grossed Up)
Dividends from unit trusts and open ended investment companies:	£	f	SA100 TR3 Box 4 (Grossed Up)
Foreign dividends (up to £300):	£	£	SA100 TR3 Box 5
UK bank, building society, unit trust etc. interest/amount which has been taxed already (grossed up) + untaxed UK interest (amounts that have not been taxed at all):	£	£	SA100 TR3 box 1 (grossed up) + SA100 TR3 Box 2 or SA200 box 5.1 (grossed) + SA200 box 5.2
UK interest, dividends and other investment income – company dividends (excluding tax credit):	£	f	SA200 Box 5.3
Total savings and investment income showing on your SA100 and SA200 documents:	£	f	Write this total figure on the application.

# Evidence 😑

Please send any of the following:

- Self Assessed Tax Return
- Copies of Dividend Statements
- Statements
- Half Yearly Certificates

# Income from savings and investments

Total income showing on your SA101 document

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
Stock dividends:	f	£	SA101 Ai1 Box 12 (Grossed Up)
Non-qualifying distributions and close company loans written off or released:	£	f	SA101 Ai1 Box 13
Interest from gilt edged and other UK securities – gross amount before tax:	£	f	SA101 Ai1 Box 3
UK life insurance policy etc. gains on where no tax was treated as paid:	£	£	SA101 Ai1 Box 6
UK life insurance policy etc. gains from voided ISA's:	f	f	SA101 Ai1 Box 8
Life insurance gains - UK life Insurance policy etc. gains on which tax was treated as paid:	£	£	SA101 Ai1 box 4
Share schemes - taxable amount:	f	f	SA101 Ai2 Box 1
Total savings and investment income showing on your SA101 document:	£	£	Write this total figure on the application.

# Evidence e

Please send any of the following:

- Self Assessed Tax Return
- Copies of Dividend Statements
- Statements
- Half Yearly Certificates

# Income from savings and investments

Total income showing on your SA104 document

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
Total untaxed savings income taxable at 20%:	£	£	SA104F Box 33
Taxed Income taxable at 10%:	£	£	SA104F Box 69
Taxed Income taxable at 20%:	£	£	SA104F Box 72
Taxed Interest:	£	£	SA104S Box 26
Total savings and investment income showing on your SA104 document:	f	f	Write this total figure on the application.

# Evidence 😑

Please send any of the following:

- Self Assessed Tax Return
- Copies of Dividend Statements
- Statements
- Half Yearly Certificates

### Income from savings and investments

Total income showing on your SA106 document

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
Foreign investment income:	£	£	SA106 F3 Box 4
Dividend income (foreign) other:	£	£	SA106 F3 Box 11
Dividends from foreign companies:	f	£	SA106 F3 Box 6 (grossed up)
Total savings and investment income showing on your SA106 document:	£	f	Write this total figure on the application.

# Evidence 😑

Please send any of the following:

- Self Assessed Tax Return
- Copies of Dividend Statements
- Statements
- Half Yearly Certificates

# **Q8** Income from taxable benefits in kind

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
Total cash equivalent of fuel for all cars/ vans made available:	£	£	P11D Box 10 (Section F & G)
Private medical treatment or insurance:	£	£	P11D Box 11
Vouchers and credit cards:	£	£	P11D Box 12 (Section C)
Mileage allowance and passenger payments:	£	£	P11D Box 12 (Section E)
Assets transferred or placed at employees disposal (cars, property, goods or other assets):	£	f	P11D Box 13 (Section A)
Assets placed at employees disposal:	£	£	P11D Box 13 (Section L)
Living accommodation:	£	£	P11D Box 14 (Section D)
Payments made on behalf of employee:	£	£	P11D Box 15 (Section B)
Cash equivalent of loans after deducting any interest paid by the borrower:	f	£	P11D Box 15 (Section H)
Qualifying relocation expenses payments and benefits:	£	£	P11D Box 15 (Section J)
Services supplied:	£	£	P11D Box 15 (Section K)
Other items (including subscriptions and professional fees):	£	f	P11D Box 15 (Section M)
Expenses payments made to, or on behalf of, the employee:	£	£	P11D Box 16 (Section N)
Total cash equivalent of all cars/vans made available:	£	£	P11D Box 9 (Section F & G)
Total income from benefits in kind:	f	f	Write this total figure on the application.

**Evidence C** Please send any of the following:

• P11D • P9D

• Self Assessed Tax Return

## Q9 Income from other taxable income and lump sums

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
Other taxable income before expenses and tax taken off (casual earnings, freelance income, business receipts where your business has ceased):	f	£	SA100 TR3 Box 15
Foreign earnings not taxable in the UK:	£	£	SA101 Ai2 Box 12
Taxable lump sums, excluding redundancy and compensation for loss of job:	£	f	SA101 Ai2 Box 3
Lump sums or benefits received from an employer financed retirements benefit scheme:	£	f	SA101 Ai2 Box 4
Redundancy and other lump sums and compensation payments:	£	£	SA101 Ai2 Box 5
Other income (short return):	£	£	SA200 Box 7.1
Total income from other taxable income and lump sums:	f	£	Write this total figure on the application.

# Evidence e

Please send your Self Assessed Tax Return

# **Q10** Income from property lettings

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
Income from foreign property or land:	£	£	SA106 Box 25
Income from UK property:	£	£	SA200 Box 6.3 or SA105 Box 36
Total income from property lettings:	£	£	Write this total figure on the application.

Evidence 😑

Please send any of the following:

Self Assessed Tax Return

• Copy of Rent Book

# **Q11** Income from UK trusts

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
Discretionary income payment from a trust (grossed up):	f	£	SA107 Box 1 (grossed up)
Total payments from settlor-interested trusts:	£	£	SA107 Box 2
Foreign estate income:	£	£	SA107 Box 22
Non-discretionary income entitlement From a trust - net amount taxed at basic rate (grossed up):	£	£	SA107 Box 3 (grossed up)
Non-discretionary income entitlement from a trust - net amount taxed at savings rate (grossed up):	£	£	SA107 Box 4 (grossed up)
Non-discretionary income entitlement from a trust - net amount taxed at dividend rate (grossed up):	£	f	SA107 Box 5 (grossed up)
Income chargeable on settlors:	£	£	SA107 Boxes 13 - 14
Income from UK estates grossed up:	£	£	SA107 Boxes 16 - 21 (grossed up)
Income chargeable on settlors:	f	f	SA107 Boxes 7 - 12 (grossed up)
Total income from UK trusts:	£	f	Write this total figure on the application.

Evidence e

Please send your Self Assessed Tax Return

# **Q12** Foreign income

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
All other overseas income received by an overseas trust, company or other person abroad:	f	f	SA106 F3 Box 13
Overseas Pensions etc:	£	£	SA106 F3 Box 9
Gains on disposals of holdings offshore funds and discretionary income from non resident trusts:	£	£	SA106 F6 Box 41
Benefit received from an overseas trust, company or other person:	f	£	SA106 F6 Box 42
Gains on foreign life policies (amount of gain):	f	f	SA106 F6 Box 43
Total foreign income:	f	£	Write this total figure on the application.

Evidence 😑

Please send your Self Assessed Tax Return

# Q13 Income from an Overseas Pension

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
Total amount of unauthorised payment from a pension scheme, subject to surcharge:	£	f	SA101 Ai4 Box 10
Taxable short service refund of contribution (overseas pension schemes only):	£	f	SA101 Ai4 Box 12
Taxable lump sum death benefit payment (overseas pensions only):	£	f	SA101 Ai4 Box 13
Value of pension benefits in excess of your available lifetime allowance, taken by you as a lump sum:	f	f	SA101 Ai4 Box 5
Amount of unauthorised payment from a pension scheme, not subject to surcharge:	£	f	SA101 Ai4 Box 9
Total income from an Overseas Pension:	£	f	Write this total figure on the application.

Evidence 😑

Please send your Self Assessed Tax Return

# **Q14** Other overseas income and gains

Income Type		Person 2 Amount (£)	Where to find amount
Amount of omissions (exemptions under transfer of foreign assets):	f Write this total figure on the application.	f Write this total figure on the application.	SA106 F6 Box 46

Evidence C

Please send your Self Assessed Tax Return

# Part C - Your financial information Obligations

# **Q15** Private pension contributions

Do not include any payments you made towards a retirement pension provided by your employer.

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Evidence <b>e</b>
Private pension contributions:	f Write this total figure on the application.	f Write this total figure on the application.	Please send any of the following:  Confirmation from Department of Work and Pensions of amount of pension paid  Self Assessed Tax Return  Tax Calculations  Original P60

# **Q16** Additional Voluntary Contributions (AVCs)

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Evidence <b>e</b>
Additional Voluntary Contributions (AVCs):	f Write this total figure on the application.	f Write this total figure on the application.	Please send any of the following:  Confirmation from Department of Work and Pensions of amount of pension paid  Self Assessed Tax Return  Tax Calculations  Original P60

# Q17 Allowable expenses on which you claimed tax relief

Income Type	Person 1 Amount (£)	Person 2 Amount (£)	Where to find amount
Total amount of allowable expenses:	f	f	SA100 TR3 Box 16
Seafarers earnings deduction:	£	f	SA101 Ai2 Box 11 (Deductions)
Foreign tax for which tax credit relief not claimed:	£	f	SA101 Ai2 Box 13 (Deductions)
Business travel and subsistence expenses:	f	£	SA102 E1 Box 17
Fixed deductions for expenses:	£	£	SA102 E1 Box 18
Professional fee's and subscriptions:	f	f	SA102 E1 Box 19
Other expenses and capital allowances:	f	f	SA102 E1 Box 20
Allowable expenses:	£	£	SA200 Box 2.5
Total amount of allowable expenses:	£	f	Write this total figure on the application.

# Evidence e

Please send any of the following:

- Coding Notice (P2)
- Self Assessed Tax Return

# section 11 Part D - 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 2010 and 31 December 2010 inclusive	1 September 2010 to 31 August 2011
1 January 2011 and 31 March 2011 inclusive	1 January 2011 to 31 December 2011
1 April 2011 and 30 June 2011 inclusive	1 April 2011 to 31 March 2012
1 July 2011 and 31 July 2011 inclusive	1 July 2011 to 30 June 2012

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'.

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 10/11 (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.