

Notes to help you  
complete your form PTG1

# PTG1 notes

## General Information

### A guide to completing your application for grants for part-time study

If you require further information you should refer to the booklet “Financial support for part-time students in higher education: Guide for 2007/08” or contact our Customer Support Office on 08456 077 577.

### You should not complete this form if any of the following apply to you:

- You normally live in Wales, Scotland, Northern Ireland, the Channel Islands or the Isle of Man, even if you have moved, or are moving to England to undertake your course. If this is the case you should contact whichever of the following organisations is relevant:
  - Your Local Education Authority (LEA) in Wales
  - The Student Awards Agency for Scotland (SAAS)
  - Your local Northern Ireland Education and Library Board (ELB)
  - The Education Department of Guernsey or Jersey
  - The Education Department for the Isle of Man
- You are studying at the Open University. Contact the Open University on 01908 653411 to obtain copies of its application forms for financial support.
- You are a national of a European Union Member State and you have moved or are moving to England to attend a course of higher education. You should contact the EU Customer Services Team on 0141 243 3570.
- You are a prisoner serving a custodial sentence. If this is the case, you will not be eligible for grants or Disabled Students' Allowances (DSAs) for a part-time course. If you go to prison or are released from prison during the academic year, you may be able to receive grants and DSAs for a part-time **undergraduate** course.
- You will get a bursary from the National Health Service (NHS) or the Department of Health (DoH) which is not assessed on income. This normally applies to nursing and midwifery diploma courses. There is more information about the NHS Bursary Scheme in the Department of Health's guide, “Financial Help for Health Care Students”, or from the website at [www.nhs.uk/careers](http://www.nhs.uk/careers)
- You will be attending a flexible postgraduate ITT course that lasts less than one year. If your course normally lasts for at least one year, but you do not attend for a full year or more because you were awarded Qualified Teacher Status (QTS) before then, you may be eligible for some support. Please contact your university or college for more information.

## **Disabled Students' Allowances (DSAs)**

If you wish to apply for DSAs, you will need to complete a Disabled Students' Allowance application form (DSA1) as well as the PTG1 application form. You can download a copy of form DSA1 from our website at [www.studentfinancedirect.co.uk](http://www.studentfinancedirect.co.uk) or by contacting our Customer Support Office on 08456 077 577 to have one sent to you.

If you have already applied for DSAs for part-time study you will already have supplied information that demonstrates your eligibility for student finance. You will NOT need to complete questions **d** or **e** in section 2 or any of section 3 of the PTG1 form. If you are in doubt about what information you now need to provide, please contact the Customer Support Office on 08456 077 577.

If you wish to apply for DSAs as a postgraduate student or as a distance learning student, you should not complete the PTG1 form. You should download a copy of form DSA1 from our website at [www.studentfinancedirect.co.uk](http://www.studentfinancedirect.co.uk) or by contacting our Customer Support Office on 08456 077 577 to have one sent to you.

## **Cross border study**

Eligible part-time students who are living in England but choose to study in Wales, Scotland or Northern Ireland (the devolved administrations) will still receive financial support in the form of a fee grant and a course grant. The fee grant available for these students will be equal to that which the devolved administrations would provide to its own students. However, it will not be more than the maximum statutory fee grant offered to students living in England who choose to study in England.

## **Part-time distance learning students**

**Note:** Where your place of study is in England the term "administration" means the Secretary of State for Education and Skills; where your place of study is in Wales the term "administration" means the National Assembly for Wales; where your place of study is in Northern Ireland the term "administration" means the Department for Employment and Learning.

If you are a part-time student undertaking a course by distance learning and are eligible for student finance, your financial support will be provided by the administration you live in and not by the administration within which the university or college providing your course is situated. For example, if you are undertaking a distance learning course from your home in England but your course is provided by a university or college in Scotland, Wales or Northern Ireland, and you are eligible for student finance, your financial support will be provided by the English administration.

## **Academic year**


Academic years begin in the autumn, winter, spring and summer, and last for 12 months. The first day of the academic year is not necessarily the day on which you begin that year of your course. It is decided by the period during which your year begins. The academic year starts on:

- 1 September, if your study begins between 1 August and 31 December inclusive;
- 1 January, if your study begins between 1 January and 31 March inclusive;
- 1 April, if your study begins between 1 April and 30 June inclusive; or
- 1 July, otherwise.

For example, if you start your year of study on 4 October 2007, your academic year runs from 1 September 2007 until 31 August 2008.

## Section 1 personal details

- a** Your ART ID is your customer identifier in the student finance system. It is an eleven-digit number. You will have received an ART ID if you have received a student loan or other student finance from a local authority or from SLC before. You may also have an ART ID if you have provided financial information for another student's application. If you have never dealt with Student Finance Direct before, you will receive an ART ID shortly after you return the PTG1 application form. If you do not have, or do not know, your ART ID, leave the box blank.

 **You must send your original birth certificate, adoption certificate or passport** with your application form if you have not already done so with a previous application for student finance. If you have a United Kingdom (UK) birth certificate issued by a British Consulate abroad, please send this.

If you choose to send either your birth or adoption certificate, it must be accompanied by a completed Birth/Adoption Certificate Declaration Form. This form contains two separate declarations. The Declaration of Identity must be signed by yourself to confirm your identity. The Identity Confirmation is to verify your identity and must be completed by a person of good standing in the community who has known you for at least two years.

You can download a Birth/Adoption Certificate Declaration Form from our website at [www.studentfinancedirect.co.uk/forms](http://www.studentfinancedirect.co.uk/forms). Alternatively, contact our Customer Support Office and they will arrange to have one sent to you.

**Your documents will be returned to you as soon as possible.**

If you have lost your birth certificate you should get a replacement by contacting the Register Office in the sub district where your birth was registered. If you do not know where this sub-district is, you should contact the general register office at one of the following addresses:

- If you were born in England or Wales: General Register Office, PO Box 2, Southport, Merseyside, PR8 2JD, Tel: (0151) 471 4816;
- If you were born in Scotland: General Register Office for Scotland, New Register House, Edinburgh, EH1 3YT, Tel: (0131) 314 4451 or 4456;
- If you were born in Northern Ireland: Registrar General, Oxford House, 49-55 Chichester Street, Belfast, BT1 4HL, Tel: (028) 902 52000.

**DO NOT send your application form to any of the above addresses.**

If your name has changed from the name that appears on your birth certificate or passport then please send the relevant evidence confirming this and give details of any previous names you have had on a separate piece of paper and enclose it with the PTG1 form.

- b1** The definition of your partner, and therefore whether their income details will be needed for the purposes of income assessment, depends on when you entered higher education.  
**If you do not have a partner as defined below, we will only assess your income.**

For students who entered higher education **on or after 1 September 2000 but before 1 September 2005**, your partner is:

- your husband or wife;
- your civil partner; or
- your opposite sex partner if you are 25 or over and you live together as though you were married.

## Section 1 personal details

For students who entered higher education **on or after 1 September 2005**, your partner is:

- your husband or wife;
- your civil partner;
- your opposite sex partner if you live with your partner as though you were married; or
- your same sex partner if you live with your partner as though you were in a civil partnership.

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

**e** **If you will be under 25** at the start of the academic year and you are married or in a civil partnership, please send your original marriage certificate or civil partnership documents with the PTG1 application form.







If you have entered into an overseas civil partnership or an equivalent legal relationship with a same-sex partner, we will contact you to let you know whether this will be recognised for student finance purposes.

**c** If you provide a correspondence address then all correspondence we issue will be sent to that address from the date you move (or moved) there. You can update your correspondence address or your home address at any time by contacting our Customer Support Office.

## Section 2 previous loans or financial support

- a** We need to know of any other assistance you are receiving to help you undertake your course. Examples of this are day release arrangements, help with travel and other course costs, and help with childcare. Please give this information on **a separate sheet of paper and attach it with the form**.
- c** If you already hold a first degree from a UK institution you will not be eligible for any part-time grants. If you previously started a course which leads to a first degree qualification (e.g. BA, BSc or BEd) but did not finish it, you should answer “No” to this question. You should also answer “No” if you hold a qualification such as an HND, HNC or Dip HE, because these are not first degrees; or if you hold a degree that was awarded outside the UK. The UK does not include the Isle of Man or the Channel Islands.
- d** You will not normally be able to get any grants until you are up to date with your repayments on any previous loans you have had from the Student Loans Company. You should call the Student Loans Company on 0800 40 50 10 for advice.
- e** You will not normally be able to get any grants until you have signed all of the relevant documents. You should call the Student Loans Company on 0800 40 50 10 for advice.

## Section 3 residence

- a1**  If you answer “Yes” to this question, you must send your passport or birth certificate as evidence of your 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.
- a2**  If you answer “Yes” to this question, you must send your passport or national identity card as evidence of your EU nationality.
- a3**  If you answer “Yes” to this question, you must provide evidence to confirm that your parent is a Swiss national and that you are their child by sending your parent’s passport or national identity card (if these show proof of their Swiss nationality and your relationship to them).
- a4**  If you are an EEA or Swiss national who is currently employed in the UK, you will need to provide evidence such as a P60 or a letter from your employer.
- If you are an EEA or Swiss national who is currently working in the UK as a self-employed person you will need to provide evidence such as audited accounts, tax returns or details of income.
- If you are going to continue working whilst you are studying you will need to provide a letter from your employer confirming this or audited accounts, tax returns or details of income if you are self employed.
- If you are an EEA or Swiss national who is currently looking for work in the UK, you will need to show evidence of this, as well as your previous employment or work as a self employed person in the UK such as a P45, P60 or a letter from your employer or audited accounts, tax returns or details of income if you were self-employed.
- If you are an EEA or Swiss national who previously worked in the UK, you will need to provide evidence such as a P45, P60 or a letter from your previous employer.
- In all cases you will need to provide evidence of your EEA or Swiss nationality such as a passport or national identity card.
- If it is your relative who is working, has worked or is looking for work in the UK then they will need to provide the relevant evidence rather than you.
- If your child, or son or daughter-in-law 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 you are a British citizen, have a right of ‘permanent residence’ in the UK, have been granted ‘indefinite leave to remain’ or if 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 Immigration and Nationality Directorate at the Home Office at [www.ind.homeoffice.gov.uk](http://www.ind.homeoffice.gov.uk). If you do not have a British passport which confirms your immigration status, but you have a letter from the Home Office which does, please send this letter with your application form.
- a6**  If you (or your husband, wife, civil partner, parents or a 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 he or she) have been granted refugee status, the Home Office will have sent you (or him or her) a letter and an immigration status document confirming this. You should send these documents, not photocopies, with your application form. You should also provide evidence to confirm your relationship to the person who has been granted refugee status.
- If you (or your husband, wife, civil partner, parents or a step-parent) were granted refugee status without an expiry date you should mark the expiry date box as N/A (not applicable).
- 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.



## Section 3 residence

**a7** If you (or your husband, wife, civil partner, parents or a step-parent) 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 him or her) a letter and an immigration status document confirming this. Where applicable this letter should also tell you (or him or her) when the 'leave to enter or remain' status is due to expire. You should send this letter, not a photocopy, with your application form. You should also provide evidence to confirm your relationship to the person who has been granted leave to enter or remain.

If you (or your husband, wife, civil partner, parents or a step-parent) have been granted '**indefinite leave to remain**', you should mark the expiry date box as N/A (not applicable).

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.

## Section 4 about your course

- a** You should give details of your first choice. If you later accept a place on a different course or at a different university or college, you must notify us immediately. If you do not, it will delay your application.
- c** To be eligible for support your course must be a designated course under Regulation 112 of the Education (Student Support) Regulations 2007. Your university or college will be able to tell you whether your course is a designated course.
- g** Please give this answer in whole years. You should work this out assuming that you will study continuously, even if you have different plans. Your university or college will be able to tell you how long, in total, your course will take to complete.

You must be planning to complete your course in no more than twice the time it would take you to finish it on a full-time basis. If you are studying at a faster rate than this, you may be able to receive more Tuition Fee Grant, subject to your financial circumstances. See the booklet, "Financial support for part-time students in higher education: Guide for 2007/08" for information on fee grant rates applicable depending on your study rate.

- i** **Do not** complete this form if you are studying full-time and are attending your university or college regularly instead of studying by distance learning; contact the Customer Support Office on 08456 077 577 for advice. If you are not sure, your university or college will tell you whether your course is designated as distance learning or not.

## Section 5 student's bank details

Your course grant can only be paid using BACS. It will be paid into the bank or building society account you nominate in this section.

If you have already provided us with bank details on another application form for 2007/08, you do not need to provide them again, unless you wish to change them. Please note, however, that SLC cannot keep different sets of bank details for you for different kinds of support. If you provide a new set of bank details, we will use these **to pay you the part-time grant**, if you are entitled to it.

If the account is a building society account, you should check whether you also need to give a roll number. The account must be in the UK and be able to accept a payment by direct credit (check with your bank or building society if you are not sure about this).

**The bank account must be in your own name.**

## Section 6 your university or college

Intensity of study is calculated each year by considering how long it will take you to complete your course. Students should therefore make sure their university or college is in agreement with them about their intended intensity of study.

## Section 8 financial details

**a** If you are not married or in a civil partnership, but are living with a partner, we will take your partner's income into account if you have a partner as defined in Section 1, b1 of these notes.

**e** If you or your husband, wife, civil partner or partner are receiving any one of the benefits listed, you must provide evidence to show who is receiving the benefit. **You do not need to provide any other financial details.** You can either send the original document you received from the agency or authority telling you about the benefit, or you can send a completed "Confirmation of benefits" (CB1) form with your application.

You can download a copy of form CB1 from our website at [www.studentfinancedirect.co.uk](http://www.studentfinancedirect.co.uk) or by contacting our Customer Support Office to have one sent to you.

## Section 8 financial details

### b General Information

Please give details of income in the financial year ending 5 April 2007. This means income from all sources before any personal relief, payments under covenant or deductions are made, and from abroad, which is not covered by UK tax.

You do not have to declare any income you receive from Working Tax Credit or Child Tax Credit or tell us about maintenance payments for children which you either receive or pay out.

If the income on which you are to be assessed has gone down by £1,000 or more since 5 April 2007 please contact us. We may be able to work out your grant entitlement based on your income for the 2007-08 tax year.

If your husband, wife, civil partner or partner wishes to provide income information on a separate form they can obtain one from our website at [www.studentfinancedirect.co.uk](http://www.studentfinancedirect.co.uk) or by contacting our Customer Support Office to have one sent to them.

If you do not have actual figures for your income in any category please give a realistic estimate of your income and mark "E" against the entry. You may be asked to confirm the actual amount later. If your actual income is different from your estimated income we may reassess your entitlement and change the amount of support you get.


- b1** Your gross taxable income means your income from salary or wages including overtime, bonuses and commission before deductions in the financial year 2006-07. Normally, this will be the year ending 5 April 2007, but may differ if your employer or business has a tax year which does not end in April.

Please also include any income you received from abroad in the financial year 2006-07 such as from employment overseas, and any other income you get from abroad which is not covered by UK tax as well as any of the benefits asked for.

Please do not include any of the following as part of your gross taxable income:

- Any personal relief;
- Payments under covenant; or
- Non-taxable income.

Please send evidence of your earnings, such as:

-  • your P60;
- your payslips for month 12 or week 53 showing "Total paid to date" for earnings in the period 6 April 2006 to 5 April 2007;
- a completed "Confirmation of Income" (CI2) form;
- a letter from your employer confirming your earnings; or
- written details of all benefits in kind you receive.

You can download a copy of form CI2 from our website at [www.studentfinancedirect.co.uk](http://www.studentfinancedirect.co.uk) or by contacting our Customer Support Office to have one sent to you.

- b2** You should give the details shown on your self-assessment form for your trading year which ends during the period from 6 April 2006 to 5 April 2007. As confirmation of your income from self-employment you can send a letter from your accountant.

If you cannot give us the amounts, you should give an estimate and write "E" beside the amount on the form.

If you are a company director, send your P60, P11D or independent confirmation of your earnings and director's fees from a chartered or certified accountant or HM Revenue & Customs (HMRC).



## Section 8 financial details

**b6** Include here any other income you have received. For example:

- state or personal pensions. For personal pensions, please send your P60 or a letter from your pension provider showing your pension payments during the period 6 April 2006 to 5 April 2007;
- scholarships, studentships, exhibitions, bursaries, awards, grants and allowances not already given above;
- other payments you receive for attending your course during the academic year;
- any payments from an employer releasing you for your study during the academic year. (Please read the note on academic years on page 2);
- any salary or wages that you will receive from your employer while you are studying for your course. This includes work you finish before the course begins, or work you are paid for in advance which you will do after your course ends;
- fostering or boarding-out allowances where these are regular payments that foster carers receive to meet the cost of keeping a child.

**c** If you are a student who entered higher education **before 1 September 2005**, you need to provide details of any dependent children except if:

- they are your same sex partner's children; or
- they are your opposite sex partners children if you are under 25.

If you are a student who entered (or is entering) higher education **on or after 1 September 2005**, you need to provide details of any child that you have parental responsibility for, regardless of whether they are your or your partner's child.

## Section 9 bursary consent statements

### General bursary consent information

A number of 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 may ask the Secretary of State, your local authority or the Student Loans Company for access to information you provide in connection with this application for student finance (whether on this form or at a later date).

Giving consent to share your information with the university or college for bursary administration purposes means that we can provide them with your personal and financial details, as well as details of a student's course and their eligibility for student finance. This could mean that you would not have to provide information already given on the form to the university or college again.

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

## Declarations

If the applicant in section A or the person(s) named in section B are unable to sign the form, for whatever reason, someone who holds a valid Power of Attorney for that person may sign on their behalf. The Power of Attorney letter must be sent with this application before a signature from that Power of Attorney will be accepted.

## Data Protection Act 1998

**This statement sets out who will use the information provided on the PTG1 form or otherwise in connection with the application for student finance and what they will use it for.**

The information which you, your partner or relatives give on this form ("your personal information") will be used to process your student finance application. The Secretary of State for Education and Skills has transferred certain functions relating to student finance applications to Local Education Authorities (LEAs). The Student Loans Company (SLC) also carries out certain functions on his behalf.

### The LEAs and the SLC:

This Data Protection Statement applies generally to all students and their sponsors. However, some LEAs were taking part in a "Centralised Pilot Scheme" in the 2006/07 academic year and this arrangement will continue for the 2007/08 academic year. If your LEA is continuing to take part in the Centralised Pilot Scheme this will continue to affect the role that it and the SLC play in relation to your application. The specific details are set out below.

The following LEAs will continue to be part of the **Centralised Pilot Scheme** in academic year 2007/08:

**London Borough of Brent, Darlington Borough Council, London Borough of Hackney, Hartlepool Borough Council, North Yorkshire County Council, Redcar & Cleveland Borough Council, Southend-on-Sea Borough Council, South Tyneside Council, London Borough of Southwark, Stockton-on-Tees Borough Council and York City Council.**

If one of the LEAs mentioned is your LEA, your application for student finance will be continue to be dealt with by SLC and not your LEA. SLC will need the information provided in connection with your application to determine whether you are eligible for student finance and assess the maximum amount of financial support you are entitled to. SLC is the data controller for this information. SLC will need to keep personal information about you, your partner and your relatives so that it can audit its assessment of financial support. SLC will have access to your personal data in order to provide customer services to you and to respond to your questions and to update information on your account.

The Department for Education and Skills (DfES) is also a data controller for all of this information as it is responsible for it by law. However, if you would like to see your information please contact the SLC.

If your LEA is **not part of the Centralised Pilot Scheme**, it will need the information provided in connection with your application to determine whether you are eligible for student finance and to assess the maximum amount of financial support you are entitled to. Your LEA is the data controller for this information. Your LEA will need to keep personal information about you, your partner and your relatives so that it can audit its assessment of financial support. If you would like to see your information please contact your LEA. Your LEA will make the results of its assessment available to SLC so that it knows how much financial support to pay you.

Your LEA and SLC will also have shared access to account information to provide customer services to you and to respond to your questions and update information on your account.

**In all cases**, SLC will need information provided in connection with your application to handle payments, as appropriate and is the data controller for this information. SLC will have to keep personal information about you for this purpose. The DfES is also a data controller for this information as it is responsible for it by law. However, if you want to see this information please contact SLC.

SLC may also use your information to maintain or develop its systems.

**Your university or college** will receive information from the SLC so that SLC can pay to it any tuition fee grant you are entitled to, and so that it can confirm the details of your course of study. Your university or college may have shared access to your application and account information in the future for these purposes.

Your university or college may also ask for information that you provide in connection with your application for student finance (either on this form or at a later stage) such as your personal, financial and course details or information about your eligibility for student finance, for bursary administration purposes from the SLC, your LEA or the Secretary of State. This information will only be shared where you and (where relevant) any person named on your application that is providing financial information, has consented for the information being shared for bursary administration purposes.

In this instance, the university or college will be the data controller of the information and will use it to assess eligibility and make payment of any bursary or scholarship to which you may be entitled. If you would like to see this information please contact your university or college.

**The Department for Education and Skills (DfES)** will have access to your account information to provide customer services to you and may use the information you have provided on this form to monitor the performance of the student finance system and to develop future policy. Any published output from this statistical work will be anonymous and will not identify individuals.

**The Higher Education Funding Council for England (HEFCE) and the Higher Education Statistics Agency (HESA)** which carries out certain functions on behalf of HEFCE may, in carrying out HEFCE's statutory functions relating to the funding of education, use the information provided on this form for statistical analysis. HESA and HEFCE will not identify individuals in any published results.

By law, your LEA, SLC and your university or college must protect the public funds they handle and may use the information you have provided on this form to prevent and detect fraud. They may also share the information, for the same purposes, with other organisations which handle public funds.

