studentfinance ni

Application for Student Finance 2016/17

PN1

You can also apply online at www.studentfinanceni.co.uk

Your forename(s)

Your surname

Customer Reference Number (if you have one)

You should complete this form if you are a new student studying one of the following courses:

- A full-time or sandwich course of higher education
- A full-time Initial Teacher Training (ITT) course
- A part-time ITT course
- A flexible ITT course that lasts at least 6 weeks
- A diploma or degree course in a health related discipline and you are eligible to apply for an **income-assessed** bursary from the National Health Service (NHS), Department of Health (DoH) or the Student Awards Agency Scotland (SAAS)

We have provided guidance notes to help you so please refer to these each time you see this icon. n

You will have to send evidence with your application whenever you see this icon. e **Details about the evidence can be found in the guidance notes.**

Deadline

To make sure you receive your first payment at the start of term, you **must** return this form and all of the evidence we need by **15 April 2016**. We will do our best to process your application as soon as possible, however if the deadline date has passed, your first payment may not be ready for the start of term.

If your application form is returned more than 9 months from the start of your academic year it won't be processed, and you may lose your full entitlement to student finance for this academic year.

section

1 finance available

You can apply for the following student finance by completing this form:

- Maintenance Grant
- Special Support Grant
- Maintenance Loan
- Tuition Fee Loan
- Adult Dependants' Grant
- Parents' Learning Allowance
- Bursaries and Scholarships
- Travel Grant
- Childcare Grant
- Disabled Students' Allowances

You can find more detailed information on what is available and what you might be entitled to at **www.studentfinanceni.co.uk**

You can apply in 5 easy steps

Depending on your circumstances you may not need to complete all the steps

Step 1

For all students

- Complete sections 2-6.
- If you are applying for a loan you need to tell us how much you want by completing the loan request section on page 14.
- You **do not** need to complete section 6 if you are **only** applying for a Tuition Fee Loan.

! If you only want to apply for a Tuition Fee Loan and/or a Maintenance Loan not based on household income you can go directly to **Step 5**

Step 2

For students who want student finance based on household income

- Complete sections 7 and 8.
- If you think you qualify for Special Support Grant, please tick this box. ☐ Tick

  Detailed information about who can qualify for Special Support Grant and what evidence needs to be provided can be found in the notes.

Step 3

For students who have dependants

- Complete section 9.
- You should complete this section if you have any children or adult dependants and want to apply for financial help in relation to them.

! If you are a single independent student you can go directly to **Step 5**.

Step 4

For students who want student finance based on household income

- Complete section 10.
- Depending on your answers in section 10 you may need to ask your **parent(s) or partner** to provide details about their income in section 11 so we can work out what your full entitlement to student finance will be.
- If you do not wish to apply for student finance based on household income, your parent(s) or partner do not need to complete section 11.

Step 5

For all students

- Make sure that you read and sign the **Student Declaration on pages 21 and 22**. If you ask someone to complete section 11, make sure that they sign **their declarations on page 33**.

Other student finance available

Childcare Grant (CCG)

If you want to apply for Childcare Grant you need to:

- complete and return this form **and**
- complete an Application For Help With Childcare Costs (CCG1).

You can download the CCG1 form at:
www.studentfinanceni.co.uk

Tick the box below if you want us to send you a CCG1 form instead.

Send me a CCG1 form ☐ **Tick**

Disabled Students' Allowances (DSAs)

If you want to apply for DSAs you need to:

- complete and return this form **and**
- complete a Disabled Students' Allowances Application Form (DSA slim).

You can download the DSA slim form at:
www.studentfinanceni.co.uk

Tick the box below if you want us to send you a DSA slim form instead.

Send me a DSA slim form ☐ **Tick**

What if I have further questions?

If you have further questions you can:

- go to **www.studentfinanceni.co.uk**
- read 'Full-Time 2016/17 A guide to Financial Support for Full-Time Students in Higher Education.'
- call us on **0300 100 0077.** Our opening hours are Monday to Friday 8.00am to 8.00pm and Saturday and Sunday 9.00am to 4.00pm.

Where do I send my form?

Return this form to us at the Education Authority (EA) address which can be found on the EA finder available online at **www.studentfinanceni.co.uk**

Remember to pay the correct postage or we may not receive your form.

section

2 personal details

Personal details

a

Title Mr ☐ Mrs ☐ Miss ☐ Ms ☐

Forename(s)

Surname

Sex Male ☐ Female ☐

Date of birth DAY ☐☐ MONTH ☐☐ YEAR ☐☐☐☐

Please complete the following questions with the details exactly as stated on your birth certificate or passport.

Place of birth (the name of the town or village)

Nationality

! You **must** send your **original** passport, birth certificate, adoption certificate or Biometric Residence Permit with your application form. If you send a birth certificate or adoption certificate you need to send it with a Birth/Adoption Certificate Declaration Form. e

Previous loans

b

Have you ever had any other loans from the Student Loans Company (SLC)? Yes ☐ No ☐ if 'No' **go to c**

If 'Yes', are you behind with the repayments? n Yes ☐ No ☐

Contact details

c Please give your current home address. If you know it, please also give your term-time correspondence address. n

Home address

Term-time address

Postcode

Postcode

Home phone number

Date on which you will move to this address

DAY MONTH YEAR

Mobile phone number

Email address

Current relationship status

d Please tick one box:

- ☐ Single
- ☐ Living with a partner n
- ☐ Married/civil partnership → Please give the date of marriage/civil partnership DAY MONTH YEAR e
- ☐ Separated e
- ☐ Divorced/dissolved civil partnership e
- ☐ Widowed/surviving civil partner e

section

3 residence

Nationality

a1 Are you a UK or ROI national? e — Yes ☐ No ☐ — if 'Yes' **go to c1**

a2 Are you an EU national? e — Yes ☐ No ☐

a3 Are you the child of a Swiss national? e — Yes ☐ No ☐ — if 'No' **go to b1**

a4 Will your Swiss national parent be living in the UK on the first day of the academic year? n e — Yes ☐ No ☐ — if 'Yes' **go to c2**

Residence status n

b1 Are you or your:

- husband, wife, civil partner; or
- parent(s), step-parent; or
- child, son or daughter-in-law, child's civil partner

a European Economic Area (EEA) national or Swiss national who is working, has worked or is looking for work in the UK? n e — Yes ☐ No ☐ — if 'No' **go to b2**

If 'Yes', please give details below.

You should also give details of your previous studies.

If you are currently working, are you going to continue working during your studies? n e — Yes ☐ No ☐

If 'Yes', please give details.

go to c2

b2 Do you have 'settled status' in the UK? n e Yes ☐ No ☐ if 'No' go to b3

If 'Yes', give the date you received this status. DAY ☐☐ MONTH ☐☐ YEAR ☐☐☐☐ go to c2

b3 Have you or your:

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

been granted 'refugee status' by the UK Government? n e Yes ☐ No ☐ if 'No' go to b4

If 'Yes', and if applicable, give the following:

Home Office reference number ☐☐☐☐☐☐☐☐

Date this status is due to expire DAY ☐☐ MONTH ☐☐ YEAR ☐☐☐☐ go to c2

b4 Have you or your:

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

been given 'leave to enter or remain' in the UK as a result of a failed asylum application? n e Yes ☐ No ☐

If 'Yes', and if applicable, give the following:

Home Office reference number ☐☐☐☐☐☐☐☐

Date this status is due to expire DAY ☐☐ MONTH ☐☐ YEAR ☐☐☐☐ go to c2

! **If you answered 'No' to all the questions in this section you are not eligible for student finance from Student Finance*ni*.**

section 3 continued residence

Residence history

C1 In the three years prior to the start of the first academic year of your course, **did you live outside the UK and Islands** at any time? Yes ☐ No ☐ if 'No' **go to c3**

C2 Give details of your residence for the three years before the start of the first academic year of your course.

Full address		DAY	MONTH	YEAR	Why were you there?
	From				
	To				
	From				
	To				

If you require further space to provide your answer, please give the details requested above on the Additional notes section at the back of this form.

C3 At any time since 1 September 2013 has:

- either of your parents, step-parents, guardians; or
- your husband, wife, civil partner

lived or worked outside the UK and Islands or, in the case of an EU, EEA or Swiss national, outside the EEA or Switzerland? Yes ☐ No ☐

If 'Yes', please give details below.

Full address of where they lived when away		DAY	MONTH	YEAR	Why did they live there?
	From				
	To				
	From				
	To				

If you require further space to provide your answer, please give the details requested above on the Additional notes section at the back of this form.

section

4

about your course and your university or college

In this section, give details of your first choice university or college and course.

University or college details

a University or college name and address

Postcode

UCAS personal identification number

UCAS university or college code

UCAS campus code (if applicable)

Course details

b Course name

If you are following a combined studies or modular course, please list all subjects being studied.

UCAS course code

Qualification you expect to gain (for example, BSc Physics)

Course start date MONTH YEAR

Course end date MONTH YEAR

Course length (years)

Year of course

- Foundation
- First year
- Second year
- Third year
- Fourth year

Other (give details)

section

4 about your course and your university or college

c d

Full tuition fee amount for this academic year £

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

If the course is franchised to another university or college, give their address below

Postcode

Course type (please tick one box): n

c ☐ Full-time undergraduate

Initial Teacher Training (ITT) courses

☐ Flexible postgraduate ITT

☐ Part-time undergraduate ITT

☐ Part-time ITT (excluding first degrees)

☐ Full-time postgraduate ITT

Answer both questions

Number of weeks you will be studying full-time in this academic year. e

Number of weeks you will be on full-time teaching practice in this academic year. e

Other course types

☐ Full-time distance learning

☐ Full-time foundation degree

☐ Full-time involving a placement (sandwich course)

Do you have a disability which prevents you from attending your university or college in person? e **Yes** ☐ **No** ☐

Term details

d Where will you live during this academic year?

Term 1	Living with parent(s) ☐	Elsewhere or own home ☐
Term 2	Living with parent(s) ☐	Elsewhere or own home ☐
Term 3	Living with parent(s) ☐	Elsewhere or own home ☐

about your course and your university or college

e Where will you spend most of your time this academic year?

Term 1	University or college ☐	Study abroad ☐	Work placement ☐
Term 2	University or college ☐	Study abroad ☐	Work placement ☐
Term 3	University or college ☐	Study abroad ☐	Work placement ☐

if you have ticked 'University or college' for all 3 terms **go to section 5**

f Have you been accepted onto the Erasmus exchange scheme? **Yes** ☐ **No** ☐

if 'Yes' and/or you'll be studying abroad **go to section 5**

Placement details

g Where will your placement be?

Abroad ☐

UK/ROI ☐

Don't know ☐

Placement name and address

Postcode

Is the placement:

paid ☐

unpaid ☐

If 'unpaid', please tick which type:

☐ a hospital, Public Health Service Laboratory or with a Primary Care Trust;

☐ a Health Authority, Strategic Health Authority, Local Health Board, Special Health Authority, Health Board, Special Health Board or a Health and Social Services Board;

☐ a Local Authority carrying out its duties relating to health, welfare or caring for children and young people, a voluntary organisation providing facilities or carrying out similar activities;

☐ the prison or probation sector or after-care services;

☐ unpaid research in a UK/ROI or overseas institution; or

☐ an unpaid placement that is not listed above.

section

5 previous financial support and other information

Previous study

Undergraduate and postgraduate courses of higher education are those of Higher National Certificate (HNC) level or above. Where course details are requested, you should not include A Level/AS Level examinations or equivalent.

a1 Have you started an undergraduate or postgraduate course of higher education in any country since leaving school?

Tick 'Yes' even if you did not complete the course. **Yes** ☐ **No** ☐ if 'No' **go to b1**

a2 Did you achieve a qualification? **Yes** ☐ **No** ☐ if 'No' **go to a4**

a3 Please tick the relevant box(es) to show which qualifications you have achieved. If your qualification was achieved abroad tick other.

- ☐ Degree **with** Honours e.g. BA (Hons), BSc (Hons);
- ☐ Degree **without** Honours e.g. BA, BSc;
- ☐ Foundation Degree/Diploma of Higher Education/Higher National Diploma (HND);
- ☐ Higher National Certificate (HNC)/Certificate of Higher Education (CertHE);
- ☐ Postgraduate Certificate in Education (PGCE);
- ☐ Graduate Diploma/Certificate;
- ☐ Masters Degree;
- ☐ Postgraduate Diploma/Certificate;
- ☐ Other (please give details)

a4 Please give course details below. Do not mention any course that you studied part-time where you did not achieve a qualification; or any course that was entirely self-funded at a private institution where you did not achieve a qualification.

Title of course (for example BA History or BA (Hons) History)	Name of university or college	Town/country of university or college	Date started	Date left	Did you achieve a qualification?
			(MM YYYY)	(MM YYYY)	Yes ☐ No ☐
					Yes ☐ No ☐
					Yes ☐ No ☐

If you did not achieve a qualification for any course listed above, why was this?

section

previous financial support and other information

5 continued

b1 In this academic year, are you eligible to apply for a bursary, excluding social work bursary from any of the following?

- National Health Service (NHS)
- Department of Health (DoH)
- Student Awards Agency Scotland (SAAS)

Yes ☐ **No** ☐ if 'No' **go to section 6**

b2 If 'Yes', is this bursary:

Income assessed ☐

Non-income assessed ☐

section

your UK bank or building society account details

6

This account must be in your own name and be able to accept direct credits.

You do not need to provide your bank or building society account details if you are only applying for a Tuition Fee Loan.

Please note that missing or incorrect bank or building society details will result in your Maintenance Loan, bursary (if applicable) or any grant payments being delayed.

You can update your bank details at any time by logging into your student finance online account at **www.studentfinanceni.co.uk**

Sort code ☐☐ – ☐☐ – ☐☐

Account number ☐☐☐☐☐☐☐☐

Building society roll number (if applicable) ☐☐☐☐☐☐☐☐☐☐☐☐

loan request section

If you are applying for a Maintenance Loan, a Tuition Fee Loan or Student Contribution Loan you need to complete this section to tell us how much you want to apply for.

National Insurance number ☐☐ - ☐☐☐☐☐☐ - ☐

Maintenance Loan

Amount of Maintenance Loan you would like to apply for:

Maximum available to you ☐ Tick

If you wish to apply for less than the maximum available to you, please state the amount £

Tuition Fee Loan

Your tuition fee is set by the university or college you go to. You can apply for a Tuition Fee Loan to cover your fees. This will be paid directly to your university or college.

Make sure you find out from your university or college how much they will be charging before you apply for a Tuition Fee Loan.

Amount of Tuition Fee Loan you would like to apply for:

Maximum available to you ☐ Tick

If you wish to apply for less than the maximum available to you, please state the amount £

Student Contribution Loan

Amount of Student Contribution Loan you would like to apply for: Maximum available to you ☐ Tick

If you wish to apply for less than the maximum available to you, please state the amount £

Contact details

We need you to give the name and address of two additional contacts. We'll only contact them if we can't get in touch with you, for example if you move address and forget to tell us. By entering these details, you're confirming you've told your additional contacts about this and they're happy for Student Loans Company to contact them if necessary.

Contact 1	**Contact 2** (Contact 2 must live at a different address from Contact 1)
Forename(s)	Forename(s)
Surname	Surname
Relationship to you	Relationship to you
Address	Address
Postcode	Postcode
Country	Country
Phone number	Phone number

section

7 dependent and independent students

This section determines whether you are a dependent or an independent student. This is important as it establishes whose income we need to take into account from your household before we calculate your entitlement.

a1 Will you be 25 or over on the first day of the academic year? **Yes** ☐ **No** ☐

if 'Yes', you are an independent student, **go to section 8**

a2 Have you been married or in a civil partnership at any time before the first day of the academic year? **Yes** ☐ **No** ☐

if 'Yes', you are an independent student, **go to section 8**

a3 Will you have care of a person under the age of 18 on the first day of the academic year? n e **Yes** ☐ **No** ☐

if 'Yes', you may be considered an independent student, **go to section 8**

b Please tick the relevant box if any of the following apply to you.

☐ Your parents cannot be found or it is not reasonably practicable to get in touch with them.

☐ You are irreconcilably estranged from (have no contact with) your parents and this will not change. n

☐ At any point from the age of 16 to the start of your course, you have not been under the legal care of your parents; and, for three months or more, you have been in the custody or legal care of, or have been given accommodation by, a local authority. n

☐ Both your parents have died.

☐ You have applied for student finance before, and the parent who was assessed for a contribution has died.

☐ Your parents are living outside the European Union and the assessment of their financial circumstances would place them in jeopardy.

☐ Your parents are living outside the European Union and it would not be reasonably practicable or possible for them to send you money.

If you have ticked any of the boxes above, you will be contacted for evidence and, subject to this, you may be considered independent.

if you have ticked any of the boxes above **go to section 8**

dependent and independent students

c Have you supported yourself financially for a total of three years or more prior to the start of the first academic year of your course? n Yes ☐ No ☐

If 'No' you will be considered a dependent student, **go to section 8**

If 'Yes', you may be considered an independent student. Please give details below.

Name and address of your employer or benefit office	Did you work full or part-time?	From (MM YYYY)	To (MM YYYY)	Amount of salary, wages or benefit you have received (state whether it was weekly, monthly or yearly) e

section 8

student financial details

If you leave any questions blank we will not be able to process your application. If a question does not apply to you, please enter 'None' or 'N/A' as the answer.

Unearned income

a Taxable **unearned** income is any income you receive from the following sources:

- Bank or building society gross interest
- Property, lettings or rent
- Dividends or investments
- Trusts or sponsorships
- Any other payment received for attending the course

Please estimate the total taxable unearned income, before deductions, that you expect to receive for this academic year. n £

What is the source of this income?

Payments from an employer

b Will your employer be releasing you to attend your course this academic year? Yes ☐ No ☐ if 'No' **go to d**

If 'Yes', how much will your employer pay you for time spent attending your course during this period? n £

c During this academic year, will you or your employer pay any money into a pension fund on your behalf? Yes ☐ No ☐

If 'Yes', how much are the payments for during this period? £

Dependent children

d Give details of any children who will be wholly or mainly financially dependent on you during this academic year.

Your child's income should include their net income from all sources, after Income Tax and social security contributions, for tax year 2014-15.

Child's full name	Date of birth e	Relationship to you	Who will they live with?	Child's income e n
	(DD MM YYYY)			

section

9 Parents' Learning Allowance, Adult Dependants' Grant and Childcare Grant

Only complete this section if you want to apply for Parents' Learning Allowance, Adult Dependants' Grant or Childcare Grant. n

a Are you a lone parent? Yes ☐ No ☐ if 'Yes' **go to d**

b Are you under 25, living with a partner and applying for Childcare Grant or Parents' Learning Allowance? Yes ☐ No ☐ if 'No' **go to d**

c Give the total estimated income after Income Tax and National Insurance deductions in this academic year for: n

You £ Your partner £

How much of this will be Child Tax Credit for this academic year?

You £ Your partner £

Only answer this question if you are applying for Childcare Grant.

d During the academic year, do you or your partner expect to receive:

- the childcare element of Working Tax Credit; or
- Tax-Free Childcare from HM Revenue and Customs (HMRC); or
- Childcare Allowance from the NHS n

Yes ☐ No ☐

If `Yes', you can't get Childcare Grant and receive childcare support from one of these sources at the same time. You can still apply for Childcare Grant, however, you'll only get it if you stop receiving support from these sources.

e1 Are you applying for Adult Dependants' Grant? Yes ☐ No ☐ if 'No' **go to section 10**

e2 Who is your adult dependant?

husband, wife, civil partner, or partner (if you are over 25) ☐ **go to section 10**

other adult dependant ☐ **go to e3**

e3 Will your adult dependant's income be more than £3,873 in this academic year? Yes ☐ No ☐

If 'Yes' you won't be able to receive Adult Dependants' Grant

Parents' Learning Allowance, Adult Dependants' Grant and Childcare Grant

e4 Give your adult dependant's income for tax year 2014-15 n e

Income

All salary or wages and self employed income (including income from property)	£
All pensions, including private, occupational and state	£
All gross taxable income and interest from savings, investments and dividends	£
Taxable state benefits	£
All other taxable income	£

Deductions

Private pension contributions and Additional Voluntary Contributions (AVC's)	£
Allowable expenses on which you claimed tax relief	£

section

10 about your family n

If you are a **dependent student** go to **question a**.

If you are an **independent student with a partner**, please read and sign the **Student Declaration** on **pages 21 and 22** and then pass this form to your partner to complete **section 11**.

If you are a **single independent student**, go to the **Student Declaration** on **pages 21 and 22**.

a With which parent do you normally live, or have more contact with?

☐ Mother ☐ Father

or

☐ Both ☐ N/A

b What is the relationship status of this parent at the time of applying?

- ☐ Single n
- ☐ Living with a partner
- ☐ Married/civil partnership
- ☐ Separated e
- ☐ Divorced/dissolved civil partnership e
- ☐ Widowed/surviving civil partner

What you need to do next

Read and sign the **Student Declaration** on **pages 21 and 22** and then pass this form to your parent(s).

What your parent(s) need to do

The parent(s) you normally live with should complete **section 11**. If the parent indicated in '**a**' is married, in a civil partnership or living with a partner, their partner must also complete **section 11.**

Student Declaration

Before signing and returning your completed form, you should read the Data Protection statement in the accompanying notes.

This declaration covers all of the student finance available to students for academic year 2016/17.

By signing this declaration you are confirming that you have read the specific terms and conditions about loans, Childcare Grant and Disabled Students' Allowances because they will affect you if you apply for them at any time in academic year 2016/17. If you don't apply for these in academic year 2016/17 their specific terms and conditions will not affect you.

Your application for financial support may be delayed unless you sign and date this declaration.

General Declaration

- I confirm that to the best of my knowledge and belief, the information I have provided is true and complete. If it is not, I understand that I may not receive financial support, any support I have had may be withdrawn and I could be prosecuted.
- I agree to give my Education Authority (EA) - Regional Office any information they require to process my application and agree to tell them immediately if my circumstances change in any way that might affect my entitlement to financial support. I understand that if I do not do this, I may not receive any further payments, and may have to repay the financial support I have already received.
- I agree that in the event of receiving an overpayment of financial support, I am obligated to repay this in full and I agree that such overpayment may be recovered by deduction from any future entitlement to financial support.

Loan Contract

a I have read and understood the booklet 'Student Loans: A guide to terms and conditions' available online at **www.studentfinanceni.co.uk**

b I acknowledge and agree that any loan(s) made to me by the Department for the Economy (which includes any person exercising functions on behalf of the Department for the Economy, together with any successor(s) thereto (the "lender") pursuant to Article 4 (3) of the Education (Student Support) (Northern Ireland) Order 1998 (as amended) and/or successor legislation, ('the Order')) will be on the terms set out in the Loan Request Form including these declarations and in Regulations which are made under Article 3 of the Order.

c I acknowledge and agree that in the event that I have: (i) reached the age of 18 years; and (ii) have entered into one or more agreements for a loan under section 22 of the Teaching and Higher Education Act 1998 (and relative secondary legislation) before I reached the age of 18 years, upon signing this declaration I am agreeing to ratify any and all such student loans. I understand that ratification of any agreement for a loan made with me before I reached the age of 18 years is a statutory precondition of my eligibility for student support after attaining the age of 18 years.

d I undertake to repay the lender any loan(s) made to me, together with all and any interest, penalties and charges which apply.

e I agree that any loan(s) made to me as a consequence of the acceptance of my application by the lender is a/are contract(s) between me and the lender which binds me from the payment to me of the first loan advance and that the repayment of any such loan(s), together with all and any interest, penalties and charges which apply, will be due by me to the lender as a debt.

f I agree that I shall be obliged to make repayment of my loan(s), together with all and any interest, penalties and charges which apply, to such address as shall be notified to me in writing and that any services in respect of my loan(s) may be provided at such address or other address(es) as the lender may from time to time determine and that the service of providing the loan is provided at the lender's principal address.

g I agree that any action for repayment and/or in respect of or in connection with my loan(s) and/or all and any interest, penalties and charges which apply, will be brought before the ordinary civil courts and shall be governed by the general rules of civil procedure.

h I agree that my request for a loan, the loan and the contract between me and the lender shall be governed by the law of the place of my home address as stated in this form (or, if my address is outside the United Kingdom, the law of Northern Ireland).

i I irrevocably agree that the courts of the part of the United Kingdom in which my home address stated in this form is situated (or the English, Scottish and Northern Ireland courts where my address is outside the United Kingdom) shall have non-exclusive jurisdiction to hear any action or proceedings arising out of or in connection with the loan and the contract between me and the lender and I irrevocably submit to the jurisdiction of those courts and waive any objection to the jurisdiction of those courts, provided that this shall not limit the lender's rights to take proceedings against me in any other court of competent jurisdiction.

j I agree that from the date I submit this form until the date when my loan(s), together with all and any interest, penalties and charges which apply, is fully repaid I will notify the lender of any changes in the personal details (including National Insurance number) and contact details I have provided as required in accordance with the Regulations referred to in paragraph b.

k In the event that I leave the United Kingdom to reside outside the United Kingdom or that for any other reason I am outside the UK tax system, I undertake to inform the lender in accordance with the Regulations referred to in paragraph b and I undertake to provide the lender with my new and any subsequent contact details until my loan, together with all and any interest, penalties and charges which apply, is fully repaid.

l I agree to take all future action requested by the lender and provide the lender with all information required to ensure repayment, in accordance with the Regulations referred to in paragraph b.

m If I breach any of the terms under which any loan(s) will be made I agree that I will be obliged to pay any charges and penalties which may apply under the Education (Student Support) (NI) Order 1998 and the Regulations made under that Order, as amended from time to time or successor legislation and/or Regulations.

n I understand that the Student Loans Company will check my National Insurance number and personal details with the Department for Work and Pensions (DWP). If I do not know my National Insurance number, or if the number I provide cannot be authenticated, DWP will trace and give my number to the lender.

o If I have broken the terms of this contract I agree that the lender may share information held about me and my account with any person, including the government or a government agency of another country, who may assist in establishing my whereabouts and/or in taking action to recover outstanding loan amounts.

Disabled Students' Allowances (DSAs)

- I understand that any equipment I receive through DSAs must be used for my course of study and my EA - Regional Office is not responsible for paying any repair costs.

Childcare Grant (CCG)

- I understand that if I do not take up my childcare, or if I change to a childcare provider who is not registered or approved, I will have to pay back any overpayment.
- I understand that if I do not provide the evidence of childcare costs within the timescales set, I might lose my entitlement. Also if my payments to my childcare provider are different from the estimates I provide, I understand that further payment will increase or decrease accordingly, or if no further Childcare Grant payments are due to be paid to me, I may be liable to repay any difference.
- I confirm that neither I nor my husband, wife, civil partner or cohabiting partner have chosen to receive support for childcare from the childcare element of:(i) the Working Tax Credit; (ii) Tax-Free Childcare; and/or (iii) the NHS Childcare Allowance; and I agree to tell my EA - Regional Office immediately if I or my husband, wife, civil partner or cohabiting partner does receive this support. I understand that my EA - Regional Office reserves the right to share my personal data with HMRC to check whether I am in receipt of childcare support from HMRC.

Customer Reference Number

Your full name
(in BLOCK CAPITALS)

Your signature X

Today's date DAY MONTH YEAR

Bursary and scholarship data sharing consent will not affect your entitlement to any other financial support available. You may be eligible for a non-repayable bursary or scholarship. In order for your university or college to determine and pay any bursary or scholarship to which you may be entitled, we will share some of your personal, financial and course details as well as information about your eligibility for student finance with them. Most universities and colleges will not pay bursaries and scholarships if you do not give consent. n

If you **do not** wish your details to be shared for this purpose, please tick this box.

The relevant person(s) you indicated in section 10 must complete section 11 as well as the declaration(s) on page 33.

Please pass this form to them now.

If you are a single independent student, please turn to page 35 to finalise your application.

section

11

financial details for tax year 2014-15 for parents and partners

Who needs to complete this section?

Section 10 of this form tells you who needs to complete this section.

What details do I need to provide in this section?

You need to tell us some personal details and what your financial income was for tax year 2014-15. You **must** tell us your 2014-15 income details as we cannot accept amounts from any other tax year. We need your income amounts so we can work out what the student(s) you are supporting is entitled to.

About this section

Section 11 is split into five parts:

Part A- Tell us your name and address and some other personal information.

Parts B and C- Answer every question

Part D- Answer every question and tell us about any income deductions for tax year 2014-15 where appropriate.

How to complete this section

If you are a single parent of the student

Enter your information as Person 1, leave Person 2 blank.

If there are two parents in the student's household

Complete this section with information for both Person 1 and Person 2.

If you are an independent student with a partner

Your partner needs to enter their information as Person 1, leave Person 2 blank.

If you're self assessed – read page 16 of the notes for more information.

If you're not self assessed – you can use your P60 to complete this section.

What happens if my household income has dropped since tax year 2014-15?

If your household income has dropped by 5% or more since tax year 2014-15 you can apply for a 'Current Year Income Assessment'.

This means we would use your expected income for tax year 2016-17 instead of your actual income from tax year 2014-15 when calculating the student's entitlement. However, there must be at least a 5% drop in the **overall household income** (not just your own income) between these two tax years for us to do this and we will ask for evidence of your 2016-17 income at the end of that tax year.

section 11 continued

financial details for tax year 2014-15 for parents and partners

Part A – Your personal details

Person 1

Your Customer Reference Number
(If you have one)

Relationship to the student

Title

Forename(s)

Surname

Date of birth / /

Place of birth
(name of town or village exactly as it appears on your birth certificate or passport)

Home address

Postcode

Home telephone number

Email address

Person 2

Your Customer Reference Number
(If you have one)

Relationship to the student

Title

Forename(s)

Surname

Date of birth / /

Place of birth
(name of town or village exactly as it appears on your birth certificate or passport)

Home address

Postcode

Home telephone number

Email address

You do not have to disclose your financial information to the student.

If you would like to provide it separately, you can download an Assessment of Financial Circumstances form 2016/17 from **www.studentfinanceni.co.uk** and return it to us.

Alternatively, you can have the form sent to you by ticking the box(es) below:

Person 1
Send me a separate form ☐ Tick

Person 2
Send me a separate form ☐ Tick

financial details for tax year 2014-15 for parents and partners

Part B - Your financial information for tax year 2014-15

Instructions

- Please give gross financial details for tax year **6 April 2014 to 5 April 2015**.
- Answer 'Yes' or 'No' to every question, if you answer 'Yes' please provide the income amount.
- Where you tell us an amount, you must provide evidence to support it. e

Please note that if you leave any questions blank we will not be able to process this application.

	Person 1	Person 2
Q1 Did you receive Working Tax Credit or Child Tax Credit?	☐ Yes ☐ No	☐ Yes ☐ No
Q2 Did you receive Income Support?	☐ Yes ☐ No	☐ Yes ☐ No
Q3 Did you receive any income from salary, wages, taxable state benefits or from occupational or private pensions?	☐ Yes ☐ No	☐ Yes ☐ No
a Total income from salary / wages n		
b Total income from taxable state benefits n		
c Total income from occupational pension(s)		
d Total income from private pension(s)		

e **Financial evidence required** - Please provide financial evidence for each individual amount entered above. The following table summarises the evidence you need to send to support the amounts you have given.

Income type	Tax year 2014-15 evidence items you can send
Salary, taxable state benefits, occupational / private pension(s)	Original P60
Wages and occupational pension(s)	Original Month 12 wageslip or Week 53 wageslip
Taxable state benefits - if you were unemployed for the full tax year 2014-15	Original P60U or a letter from the Social Security Agency

section 11 continued

financial details for tax year 2014-15 for parents and partners

	Person 1	Person 2
Q4 Did you receive any income from a state retirement pension?	☐ Yes ☐ No	☐ Yes ☐ No
a Total lump sum amount received	£	£
b Total non-lump sum amount received	£	£

e **Financial evidence required** - Please provide financial evidence for the amount(s) entered above. The following table summarises the financial evidence you need to send.

Income type	Tax year 2014-15 evidence items you can send
Your pension payments	Confirmation from the Social Security Agency Original P60 Original BR735 Confirmation from the Benefits Agency
Your pension payments if you were Self Assessed and completed an online tax return	A copy of your full finalised online tax return An accountant's letter or accounts validated by your accountant
Your pension payments if you were Self Assessed and completed a short paper tax return	A copy of your full finalised SA200 form An accountant's letter or accounts validated by your accountant
Your pension payments if you were Self Assessed and completed a full paper tax return	A copy of your full finalised SA100 form An accountant's letter or accounts validated by your accountant

	Person 1	Person 2
Q5 Did you receive any income from savings and investments? n	☐ Yes ☐ No	☐ Yes ☐ No
a Total **interest** from UK banks, building societies and unit trusts	£	£
b Total income from UK life insurance gains, securities and partnerships	£	£
c Total income from UK investments and dividends	£	£
d Total income from foreign investment and dividends	£	£

e **Financial evidence required** - Please provide financial evidence for the amount(s) entered above. The table at the top of page 27 summarises the financial evidence you need to send.

financial details for tax year 2014-15 for parents and partners

Income type	Tax year 2014-15 evidence items you can send
Interest from UK banks, building societies and unit trusts	Bank / building society statements Copies of dividends Half yearly statements
Income from savings and investments if you were Self Assessed and completed an online tax return	A copy of your full finalised online tax return An accountant's letter or accounts validated by your accountant
Income from savings and investments if you were Self Assessed and completed a short paper tax return	A copy of your full finalised SA200 form An accountant's letter or accounts validated by your accountant
Income from savings and investments if you were Self Assessed and completed a full paper tax return	A copy of your full finalised: SA100 and SA101 forms; plus your SA104F or SA104S form (where applicable); or SA106 form An accountant's letter or accounts validated by your accountant

Q6 Did you receive any taxable benefits in kind? n

	Person 1	Person 2
	☐ Yes ☐ No	☐ Yes ☐ No
Total income received from taxable benefits in kind	£	£

e **Financial evidence required** - Please provide financial evidence for the amount entered above. The following table summarises the financial evidence you need to send.

Income type	Tax year 2014-15 evidence items you can send
Taxable benefits in kind if your salary was £8500 or more n	Original P11D
Taxable benefits in kind if your salary was less than £8500	Original P9D

Q7 Did you receive any other income during tax year 2014-15 that you **haven't** yet told us about?

Person 1 ☐ Yes **Go to Part C**
☐ No **Go to Part D**

Person 2 ☐ Yes **Go to Part C**
☐ No **Go to Part D**

section

11 continued financial details for tax year 2014-15 for parents and partners

Part C - Other income

Instructions

- Complete Part C in the same way you completed Part B giving gross financial details for tax year **6 April 2014 to 5 April 2015**.
- Where any amount is entered you must provide evidence to support it. A table has been provided at the end of Part C to summarise what financial document(s) you need to send. e

	Person 1	Person 2
Q1 Did you receive any income from self-employment? n	☐ Yes ☐ No	☐ Yes ☐ No
a Total adjusted profit from businesses	£	£
b Total adjusted profit from partnerships	£	£
Q2 Did you receive any income as a Minister of religion? n	☐ Yes ☐ No	☐ Yes ☐ No
Total taxable income minus expenses that are not included on your P60 or P11D?	£	£
Q3 Did you receive any other taxable income or lump sums? n	☐ Yes ☐ No	☐ Yes ☐ No
Total income received	£	£
Q4 Did you receive any income from property lettings? n	☐ Yes ☐ No	☐ Yes ☐ No
Total income received	£	£
Q5 Did you receive any income from UK trusts? n	☐ Yes ☐ No	☐ Yes ☐ No
Total income received	£	£

financial details for tax year 2014-15 for parents and partners

	Person 1	Person 2
Q6 Did you receive any foreign income? n	☐ Yes ☐ No	☐ Yes ☐ No
Total income received	£	£
Q7 Did you receive any income from an overseas pension? n	☐ Yes ☐ No	☐ Yes ☐ No
Total income received	£	£
Q8 Did you receive any other overseas income and gains? n	☐ Yes ☐ No	☐ Yes ☐ No
Total income received	£	£

Financial evidence you need to send for tax year 2014-15

e Please provide financial evidence for each individual amount you entered in Part C. The following table summarises the financial evidence you need to send.

How you submitted your 2014-15 details to HM Revenue & Customs (HMRC)	Document(s) you need to send – tax year 2014-15
Online tax return	An accountant's letter or accounts validated by your accountant or a copy of your full finalised online tax return
Short paper tax return	An accountant's letter or accounts validated by your accountant or a copy of your full finalised SA200 form
Full paper tax return	An accountant's letter or accounts validated by your accountant or a copy of each individual form that any amount you told us about is recorded on. Depending on your tax circumstances you may need to send us a copy of your full finalised: SA100 – Main tax return form SA101 – Additional information SA102M – Ministers of religion SA103S – Self-employment short version SA103F – Self-employed full version SA103L – Lloyds underwriters SA104F – Partnership full version SA104S – Partnership short version SA105 – UK Property SA106 – Foreign SA107 – Trusts

section 11 continued

financial details for tax year 2014-15 for parents and partners

Part D – Income deductions

Instructions

- Complete Part D in the same way you completed Part B giving gross financial details for tax year **6 April 2014 to 5 April 2015**.

	Person 1	Person 2
Q1 Did you pay any private pension contributions?	☐ Yes ☐ No	☐ Yes ☐ No
Total amount you paid	£	£

Financial evidence required - Please provide financial evidence for the amount entered above. The following table summarises the financial evidence you need to send.

Contribution type	Tax year 2014-15 evidence items you can send
Your private pension contributions	Original P60 Tax Calculations Confirmation from the Social Security Agency of the amount of pension paid
Your private pension contributions if you were Self Assessed	A copy of your full finalised tax return An accountant's letter or accounts validated by your accountant

	Person 1	Person 2
Q2 Did you pay any Additional Voluntary Contributions (AVCs)?	☐ Yes ☐ No	☐ Yes ☐ No
Total amount you paid	£	£

Financial evidence required - Please provide financial evidence for the amount entered above. The following table summarises the financial evidence you need to send.

Contribution type	Tax year 2014-15 evidence items you can send
Your Additional Voluntary Contributions (AVCs)	Original P60 Tax Calculations Confirmation from the Social Security Agency
Your Additional Voluntary Contributions (AVCs) if you were Self Assessed	A copy of your full finalised tax return An accountant's letter or accounts validated by your accountant

financial details for tax year 2014-15 for parents and partners

Q3 Did you have any allowable expenses on which you claimed tax relief?

	Person 1	Person 2
	☐ Yes ☐ No	☐ Yes ☐ No
Total amount on which you claimed tax relief	£	£

Financial evidence required - Please provide financial evidence for the amount entered above. The following table summarises the financial evidence you need to send.

Expense type	Tax year 2014-15 evidence items you can send
Your allowable expenses on which you claimed tax relief	Original Coding Notice (P2)
Your allowable expenses on which you claimed tax relief if you were Self Assessed and completed an online tax return	A copy of your full finalised online tax return An accountant's letter or accounts validated by your accountant
Your allowable expenses on which you claimed tax relief if you were Self Assessed and completed a short paper tax return	A copy of your full finalised SA200 form An accountant's letter or accounts validated by your accountant
Your allowable expenses on which you claimed tax relief if you were Self Assessed and completed full paper tax return	A copy of your full finalised: SA100 SA101 and / or SA102 form An accountant's letter or accounts validated by your accountant

section 11 continued

financial details for tax year 2014-15 for parents and partners

Part E – Your dependants

Identify any children who will be wholly or mainly financially dependent on you.

Q1 Child dependants not in further or higher education in academic year 2016/17

Include unearned income for **all** dependants. Only include earned income details for persons aged 16 and over. Do not count casual earnings of persons under 16.

Full name	Date of birth	Income for the year
	(DD MM YYYY)	

Q2 Child dependants in further or higher education in academic year 2016/17

Do **not** include the applicant when completing this question.

If the student is your partner, please include any children they named in section 8 of this form if the children have applied for student finance.

Full name	Date of birth	School, college or university	Course	Are they receiving financial support? If so, from which authority or organisation?
	(DD MM YYYY)			

Declaration for parents and partners

Before signing, you should read the Data Protection statement in the notes that accompany this form.

This application for financial support may be delayed unless you sign and date this declaration.

- I confirm that to the best of my knowledge and belief, the information I have provided is true and complete. If it is not I understand the student I am supporting may have their financial support withdrawn and I may be prosecuted.
- I agree to supply any further information in relation to the applicant's application for financial support that the Education Authority (EA) may ask for and agree to tell them immediately if my circumstances change in any way that might affect this application for financial support.

Person 1

Your full name (in BLOCK CAPITALS)

Your signature

X

Today's date DAY MONTH YEAR

Person 2

Your full name (in BLOCK CAPITALS)

Your signature

X

Today's date DAY MONTH YEAR

Your decision about bursary and scholarship data sharing consent will not affect the student's entitlement to any other financial support available.
In order for a university or college to determine and pay any bursary or scholarship to which the student(s) you are supporting may be entitled, we will share some of your personal and financial details with them.

If you **do not** wish your details to be shared for this purpose, please tick this box.

Your decision about bursary and scholarship data sharing consent will not affect the student's entitlement to any other financial support available.
In order for a university or college to determine and pay any bursary or scholarship to which the student(s) you are supporting may be entitled, we will share some of your personal and financial details with them.

If you **do not** wish your details to be shared for this purpose, please tick this box.

Deadline

To make sure the student receives their first payment at the start of term, this form **must** be returned with all of the evidence we need by **15 April 2016**.

We will do our best to process this application as soon as possible, however if the deadline date has passed, the first payment may not be ready for the start of term.

You must now pass this form back to the student.

Additional notes

If you are providing extra information below please clearly mark what section and question the information is about.

Confidential

Equal opportunities questionnaire

Please read the Equal Opportunities Monitoring information note on page 36 before completing this questionnaire.

Tick all the boxes that apply to you.

a Religious Affiliation

I am a member of the Protestant Community ☐

I am a member of the Catholic Community ☐

I am a member of neither the Protestant nor Catholic Community ☐

b Gender

Male ☐ Female ☐

Transgender ☐ Other ☐

c Marital Status

Single ☐ Married/Civil Partnership ☐

Separated ☐ Divorced ☐

Widowed ☐ Cohabiting ☐

Other (please specify) _____

d Carers

No caring responsibilities ☐

Care for own children ☐

Care for other relative ☐

Other (please specify) _____

e Disability

Do you consider yourself to have/have had a disability? ☐

If yes; what is, or was, the nature of the disability?

_____

f Please indicate which ethnic group you consider yourself to belong to

Chinese ☐ Irish Traveller ☐ Black/African Caribbean ☐

Indian ☐ Pakistani ☐ White ☐

Asian other (please specify) _____

Other (please specify) _____

g Please tick the age category to which you belong

16 - 24 ☐ 25 - 34 ☐

35 - 44 ☐ Over 45 ☐

Thank you for your co-operation.

Equal Opportunities Monitoring

Under Section 75 of the Northern Ireland Act (1998), the Education Authority shall, in carrying out all their functions, powers and duties, have due regard to the need to promote equality of opportunity -

(a) between persons of different religious belief, racial group, age or marital status;

(b) between men and women generally;

(c) between persons with a disability and persons without; and

(d) between persons with dependants and persons without.

In order to monitor the uptake of services provided by the Education Authority and the impact of policies, applicants are requested to provide information in relation to the above categories.

Access to Section 75 monitoring information will be strictly controlled and will not be available to those considering your application. Monitoring will involve the use of statistical summaries of information in which the identities of individuals will not appear. This information will not be available for any purposes other than for Section 75 monitoring.

Checklist

Before returning this form, please make sure you have done the following:

- Fully answered all questions that apply to you. Tick ☐
- Enclosed all evidence items. Any original evidence will be returned to you as soon as possible. e Tick ☐
- Signed and dated the relevant declaration(s). Tick ☐
- Completed the loan request section if you are applying for a Maintenance Loan, Tuition Fee Loan or Student Contribution Loan. Tick ☐
- Asked your parent(s) or partner to complete section 11 if applying for student finance based on your household income. Tick ☐

When your completed application form with all the relevant evidence has been processed, you will be sent a letter showing the amount of financial support you will receive.

Remember to pay the correct postage or we may not receive your form.

You must return your completed form to the Education Authority (EA) address which can be found on the EA finder available online at www.studentfinanceni.co.uk