



Welsh Government Learning Grant Further Education 2017/18

Application Notes

www.studentfinancewales.co.uk/wglgfe

sound advice on

STUDENT FINANCE

How to use these notes

These notes are split into sections in the same way as the Application Form, so you can find the information you need faster. You should keep these notes, there's a lot of useful information in here that might come in handy throughout the year.



Where you see this icon in the application form, there's extra **information** in these notes to help you.



Where you see this icon in the application form, it means that you need to send original **supporting documents**. These notes will tell you exactly what we need from you. You need to send original documents; if you send photocopies this will cause a delay to your application.

What is the Welsh Government Learning Grant Further Education?

It provides funding to help with the costs of your education if you're aged 19 or over. If you're studying full-time you could get payments of up to £1,500 a year or, if studying part-time, you could get up to £750 a year.

Getting this grant won't affect any benefits you or your family already receive.

Who can get the Welsh Government Learning Grant Further Education?

You could get this grant if **all** the following statements apply to you:

- aged 19 or over on the first day of your academic year in 2017/18 (1 September 2017);
- meet all required nationality and residency requirements;
- live in Wales, and didn't move there only for education purposes;
- live in a household with an income of £18,370 or less;
- studying and progressing on an eligible further education course;
- studying a course that involves at least 275 hours of study.

Additional help and information

- For the most up to date information go to: www.studentfinancewales.co.uk/wglgfe
- If you need to speak to someone about the Welsh Government Learning Grant Further Education you can call us on **0300 200 4050** (Minicom: 0300 100 1693).
- You can get copies of any of our forms or guides in Braille, large print format or audio. If you need this, you can request these by emailing your name, address and details of the format you need to: brailleandlargefonts@slc.co.uk or call **0141 243 3686**.

Anything else?

If any of your circumstances change during the academic year, you need to call us on **0300 200 4050** and let us know.

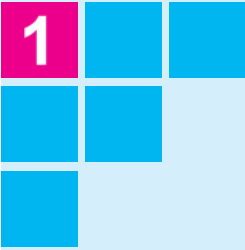
If you're applying after the start of your course and your household circumstances have changed in the meantime, please contact us on **0300 200 4050** as we may need additional income information.

Armed Forces

If you, your parent(s) or partner are serving in the armed forces, you must apply for student finance in the UK country where you were ordinarily resident when you/they enlisted unless you are permanently living in another area of the UK.

What you need to do

3 steps to getting the Welsh Government Learning Grant Further Education.



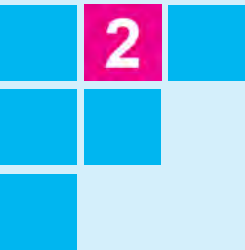
1

You complete and return your application.

Remember to pay the correct postage and get proof of postage.

We'll assess your application and send you a Provisional Award letter.

If your application is successful this shows how much you could get.



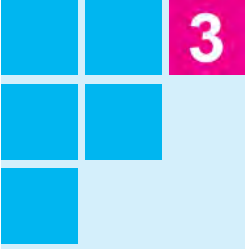
2

You sign a Learning Grant Agreement.

Once you receive your Provisional Award letter, you need to sign a Learning Grant Agreement at your school or college.

We'll send you a Final Award letter.

When your school or college tells us your Learning Grant Agreement has been signed, this confirms how much you'll get.



3

You attend your course and get paid.

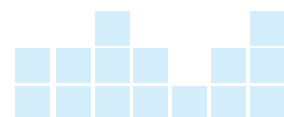
Getting paid

You'll be paid once each term, directly into your bank, building society or credit union account. You'll need to make sure we always have your most up-to-date account details or we won't be able to pay you.



If you withdraw from your course during the academic year you need to call us. You might have to repay any grant payments you've received.

Section 1 Declarations



Data Protection Statement

The information provided on this form will be used for the processing of the Welsh Government Learning Grant Further Education application and any subsequent administration. To enable the application to be processed and administered, your information will be shared with the school, college or any other institution that you attend, with HM Revenue & Customs (HMRC) and with the Student Loans Company Limited (SLC) who administer the Welsh Government Learning Grant Further Education Scheme and also with the Welsh Government. These organisations are under a duty to protect public funds, and may also use this information to detect and prevent fraud and/or monitor the performance of the student finance system. SLC may share the information with other public bodies for this purpose. SLC may also use this information to contact you about other student finance products that may be of interest to you. SLC may also retain your information to assist in the processing of any future application the applicant may make for higher education funding.

By providing the details of your parent(s) or partner, you confirm that you have obtained their consent for SLC to contact them if necessary. Your parent(s) or partner must quote your unique Customer Reference Number that appears on all correspondence we send to you regarding your application. We reserve the right to ask them further questions about the details you supply on your application form as an extra security measure.



Sharing your information

If you do not want us to share your information with your parent(s)/partner or you don't want us to use your information for market research purposes you need to call us on **0300 200 4050** and let us know.

1.2 Authorised third party



By third party we mean somebody who is able to provide evidence from a public body or a Power of Attorney confirming their status. **See 1.2 below**

1.2 Authorised third party



We need to see proof that you are authorised to act and/or hold funds on behalf of the student, send us:

- documentation from a public body (for example your Local Authority) or a Power of Attorney confirming that you are authorised to act and/or accept payments on the student's behalf.

Examples include:

- a statement of the student's special educational needs; **or**
- a letter showing you receive Disability Living Allowance (DLA); **or**
- a letter showing Personal Independence Payments (PIP) on behalf of the student.

Section 2 Your details

2.2 Personal details



We need proof of your age and identity, send us:

- your valid passport; **or**
- your birth/adoption certificate; **or**
- your Biometric Residence Permit.

If your name has changed from the one shown on your documents, you'll need to also send us proof of your name change, this can be either:

- your marriage certificate; **or**
- a deed poll

2.3 Contact details



We need proof that you live at this address, send us:

- a gas, electricity or similar bill, dated within the last three months; **or**
- your Council Tax letter for the current year; **or**
- your most recent benefits statement.

2.4 Marital status



We need proof of your current status, send us:

If you're separated

- a letter from your solicitor confirming your status.

If you're divorced

- your decree absolute; **or**
- your dissolution order; **or**
- a letter from your solicitor confirming your status.

If your civil partnership has been dissolved

- your dissolution order; **or**
- a letter from your solicitor confirming your status.

If you're married

- your marriage certificate.

If you're in a civil partnership

- your civil partnership certificate.

Section 4 Your school or college details

4.6 Already getting an allowance?



You cannot receive this grant whilst you are currently in receipt or approved for an allowance or equivalent public funding.

If you are found to be in receipt of this grant and either of these funding sources you will have to repay any grant payments you've received.

Section 5 Your nationality and residency details



EU and EEA nationals

An up to date list of all EU and EEA member countries is available at: www.homeoffice.gov.uk



Ordinarily resident

By “ordinarily resident” we mean that you normally and lawfully live in the UK, EU/EEA or Switzerland through choice. If you have moved to the UK for education purposes, you must have been ordinarily resident in the EU/EEA or Switzerland prior to becoming ordinarily resident in the UK. Don't take into account any temporary absences totalling six months or less over the three years before the first day of your course.

You must also be resident in Wales on the first day of your course to be able to get this grant.

5.1

UK national



You need to send us:

- your birth certificate; **or**
- your valid UK passport.

5.2

'Settled Status' in the UK



You need to send us:

- your Biometric Residence Permit; **or**
- your Home Office letter **and** your immigration status document.

5.3

'Leave to Enter or Remain for Humanitarian Protection' or 'Discretionary Leave'



If this status applies to you, you need to send us:

- your Biometric Residence Permit; **or**
- your Home Office letter **and** your immigration status document.

If this status applies to your family member, you need to send us:

- proof of your relationship to the family member dated the same time as their application to the Home Office.

Section 5 Your nationality and residency details (continued)

5.4 'Refugee status in the UK' or 'EU temporary protection status' in the UK



If this status applies to you, you need to send us:

- your Biometric Residence Permit; **or**
- your Home Office letter **and** your immigration status document.

If this status applies to your family member, you need to send us:

- proof of your relationship to the family member dated the same time as their application to the Home Office.

5.5 'EU National'



You need to send us:

- your valid passport; **or**
- your National Identity card.

5.6 Child of a Turkish national who is working or has worked in the UK



You need to send us:

- your valid passport; **or**
- your National Identity card.

We also need proof that your parent is a Turkish national, send us:

- your parent's valid passport; **or**
- their National Identity card **and** proof of your relationship

and proof that they are working/have worked in the UK, send us:

- their most recent P60; **or**
- their most recent P45; **or**
- a letter from their current employer on headed paper; **or**
- their latest audited accounts; **or**
- their most recent tax return; **or**
- details of their current income.

Section 5 Your nationality and residency details (continued)

5.7 Child of a Swiss national



You need to send us:

- your valid passport; **or**
- your National Identity card; **or**
- your birth certificate

and proof of your parent's Swiss nationality, send us:

- your Swiss national parent's valid passport; **or**
- National Identity card

and evidence of their UK residency, send us:

- a signed letter to confirm your Swiss national parent is living/was living in the UK on the first day of the academic year **and one of the following:**
 - latest bank statement (paper copies only); **or**
 - latest payslip (showing home address); **or**
 - tenancy agreement/mortgage statement; **or**
 - utility bill (dated within last 3 months); **or**
 - Local Authority correspondence (on headed paper); **or**
 - Government Department correspondence.

Section 5 Your nationality and residency details (continued)

5.8 EEA or Swiss national who is working/has worked or is looking for work in the UK

If you/your family member stop actively looking for work or if you/they stop working and are not actively looking for work in the UK you need to contact us on **0300 200 4050** and let us know.

If this status applies to you, you need to send us:

- your valid passport; **or**
- your National Identity card; **or**
- your Permanent Residency Card (EEA only)

and proof that you're working/looking for work, send us:

- your most recent P60; **or**
- your most recent P45; **or**
- a letter from your current employer on headed paper; **or**
- your latest audited accounts; **or**
- your latest tax return; **or**
- details of your current income; **or**
- proof that you are currently actively seeking employment in the UK.

If this status applies to your family member, you need to send us:

- their valid passport; **or**
- their National Identity card **and** proof of your relationship

and proof that they are working/looking for work, send us:

- their most recent P60; **or**
- their recent P45; **or**
- a letter from their current employer on headed paper; **or**
- their latest audited accounts; **or**
- their latest tax return; **or**
- details of their current income; **or**
- proof that they are currently actively seeking employment in the UK.

5.9 Ineligible based on your nationality and residency situation.

You need to be able to meet the nationality and residency requirements set out by the Welsh Government Learning Grant Further Education Scheme to receive this grant.

If you think you might still be eligible and you want to speak to someone about your specific situation you can call **0300 200 4050**.

Section 7 Your independence details

7.1 If on the first day of your course you'll be aged 25 or over



You need to send us:

- your valid passport; **or**
- your birth/adoption certificate

If on the first day of your course you'll be responsible for a child



You need to send us:

- your most recent Child Benefit statement; **or**
- your child's birth certificate and confirmation of your current address

If on the first day of your course you'll have financially supported yourself for three or more years



You need to send us:

- your P60 dated at least 3 years ago; **or**
- your benefits statement dated at least 3 years ago

If on the first day of your course you'll be living under the care of a Local Authority



You need to send us:

- a letter on headed paper from your Local Authority that confirms you are living under their care. This letter must also confirm your current address and needs to be signed by an authorised official from your Local Authority and include an official stamp.

If on the first day of your course you'll be, or have been, married or in a civil partnership



You need to send us:

- your marriage or civil partnership certificate

If on the first day of your course you'll be estranged from your parents or both your parents are deceased



You need to send us confirmation dated within the last year from a professional person outside your family who knows about your circumstances.

You can send **one** of the following:

- a letter from your social worker
- **if you claimed Income Support, Income-related Employment and Support Allowance or Universal Credit when you were under 18** – a letter from your local Jobcentre Plus office showing that you received benefits due to your estrangement
- **if your relationship with your parents broke down when you were at school or college** – a letter from an advice worker/personal tutor/teacher confirming your circumstances

Section 9 Financial details

Part A



Self assessed

If you completed an online tax return

You should refer to your saved online tax return for the income figures required in this section.

If you completed a paper tax return

There's an online guide to help you answer the questions in this section which you can download from: www.studentfinancewales.co.uk/wglgfe or if you would like a copy to be sent to you call us on **0300 200 4050**.



Data sharing

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

If you fail to provide your National Insurance number on the application form we will ask you to provide your financial documents. If your National Insurance number is shown on any documents you send us in support of an application, we will use this information and share and check it with HMRC in order to obtain accurate financial information about you.

Part B

Financial information for tax year 2015-16



If your household income has permanently dropped since 2015-16

To be eligible to get this grant your total household income amount must be £18,370 or less.

If in tax year 2015-16 you earned over this threshold, but since, your income has dropped below it you can be considered for this grant using your current household income.



If your household income has permanently dropped since 2015-16

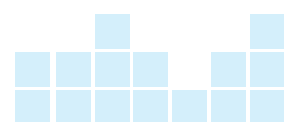
We need proof of your current household income; you need to send us:

- your latest Universal Credit Award letter; **or**
- your latest Income Support letter; **or**
- your pay slips for last 3 months; **or**
- **If self assessed** – a letter from your accountant on headed paper that states your last three months income. This letter must be signed and dated.

And proof to show that your household income has permanently dropped; send us:

- your recent P45; **or**
- your redundancy letter; **or**
- a letter from your employer on headed paper that explains the permanent drop in income. This letter must be signed and dated.

Section 9 Financial details (continued)



9.4 Income from salary or wages



If as part of your salary or wages for tax year 2015-16 you received **tips and other payments** that did not show on your P60, you still need to include this figure when providing your total income amount earned from employment.

Income from taxable state benefits



Only include income received for the following benefits:

- Bereavement Allowance
- Carer's Allowance
- Contribution-based Employment and Support Allowance
- Graduated retirement benefit
- Incapacity Benefit (only include the amount received after 28 weeks of incapacity)
- Industrial Death Benefit
- Jobseekers Allowance
- Statutory Adoption Pay
- Statutory Maternity Pay
- Statutory Paternity Pay
- Statutory Sick Pay
- Widowed Parent's Allowance

9.6 Income from savings and investments



To make this question easier to answer, we have split it up into four separate parts. You may or may not have received income from every part, just tell us about the ones you did.

Only tell us about the amount of interest / income you gained from savings and investments during tax year 2015-16, not the actual amount of savings or invested sums you had.

Total interest from UK banks, building societies and unit trusts

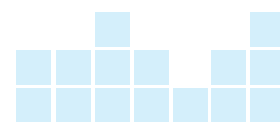


This is gross UK interest (before tax has been deducted)

You must include interest you receive on bank, building society and other savings accounts unless it is specifically non-taxable, for example, a non-taxable Individual Savings Account (ISA) etc.

If you did not declare any savings and investment income to HMRC, refer to your bank or building society statements for these figures.

Section 9 Financial details (continued)



Total income from UK life insurance gains, securities and partnerships

This includes:

- Interest from gilt edged and other UK securities – gross amount before tax
- UK life insurance policy etc. gains on which tax was treated as paid
- UK life insurance policy etc. gains on where no tax was treated as paid
- UK life insurance policy etc. gains from voided ISAs
- Your share of taxed interest etc.
- Total untaxed savings income taxable at 20%
- Taxed income taxable at 10%
- Taxed income taxable at 20%



Total income from UK investments and dividends

This includes:

- Dividends from UK companies
- Other dividends
- Stock dividends
- Non-qualifying distributions and close company loans written off or released
- Share schemes – taxable amount

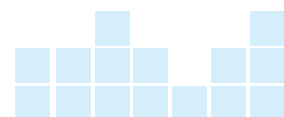


Total income from foreign investment and dividends

This includes:

- Foreign dividends (up to £300)
- Interest and other income from overseas savings
- Dividends from foreign companies
- Dividend income received by a person overseas

Section 9 Financial details (continued)



9.7 Taxable benefits in kind



This includes:

- Assets placed at employee's disposal (cars, property, goods or other assets)
- Payments made on behalf of employee
- Vouchers and credit cards
- Living accommodation
- Mileage allowance and passenger payments
- Total cash equivalent of all cars/vans made available
- Total cash equivalent of fuel for all cars/vans made available
- Cash equivalent of loans after deducting any interest paid by the borrower
- Private medical treatment or insurance
- Qualifying relocation expenses payments and benefits
- Services supplied
- Assets placed at employee's disposal
- Other items (including subscriptions and professional fees)
- Expenses payments made to, or on behalf of, the employee

Part C

Any other income

9.9 Income from self-employment



To make this question easier to answer, we have split it up into two parts. You may or may not have received income from both parts, just tell us about the ones you did.



Total adjusted profit from businesses

This includes:

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



Total adjusted profit from partnerships

This includes:

- Share of total taxed and untaxed income other than that taxable at 10% and 20%
- Your share of total adjusted profit from the partnerships

9.10 Income as a Minister of religion



This includes:

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

Section 9 Financial details (continued)

9.11 Any other taxable income or lump sums



This includes:

- Other taxable income – before expenses and tax taken off
- Foreign earnings not taxable in the UK
- Taxable lump sums
- Lump sums or benefits received from an Employer Financed Retirements Benefit Scheme excluding pensions
- Redundancy and other lump sums and compensation payments

9.12 Income from property lettings



This includes:

- Income from UK property
- Income from foreign property or land

9.13 Income from UK trusts



This includes:

- Discretionary income payment from a UK resident trust – Net amount
- Discretionary income payment from a UK resident trust – Total payments from settlor-interested trusts
- Non-discretionary income entitlement from a trust – net amount of non-savings income
- Non-discretionary income entitlement from a trust – net amount of savings income
- Non-discretionary income entitlement from a trust – net amount of dividend income
- Income chargeable on settlors
- Income from UK estates
- Foreign estate income

9.14 Foreign income



This includes:

- Total taxable amount of overseas pensions, social security benefits and royalties etc.
- Total taxable amount of all other income received by a person abroad and any remitted 'ring fenced' foreign income
- Gains on disposals of holdings offshore funds and discretionary income from non-resident trusts
- Benefit received from an overseas trust, company or other person
- Gains on foreign life policies (amount of gain)

Section 9 Financial details (continued)

9.15 Income from an overseas pension



This includes:

- Value of pension benefits in excess of your Available Lifetime Allowance, taken by you as a lump sum
- Amount of unauthorised payment from a pension scheme, not subject to surcharge
- Total amount of unauthorised payment from a pension scheme, subject to surcharge
- Taxable short service refund of contribution (overseas pension schemes only)
- Taxable lump sum death benefit payment (overseas pensions only)

9.16 Other overseas income and gains



This includes:

- Amount of omissions (exemptions under transfer of foreign assets)

Part D

Income deductions

9.19 Allowable expenses on which you claimed tax relief



This includes:

- Total amount of allowable expenses
- Foreign tax for which tax credit relief not claimed
- Business travel and subsistence expenses
- Fixed deductions for expenses
- Professional fees and subscriptions
- Other expenses and capital allowances

Additional Information

When will I get paid?

Before we can make payments:

- you must agree and sign your Learning Grant Agreement with your school or college
- and**
- your school or college must tell us you have been in attendance.

If you attend as agreed you'll be paid once each term, directly into your bank, building society or credit union account.

You'll need to make sure we always have your most up to date account details or we won't be able to pay you.