

Application notes

About these notes

Use these notes to help you complete your 'Postgraduate Doctoral Loan Application form'.

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

How to use these notes



Where you see this in your Postgraduate Doctoral Loan Application form it means there's additional information in these notes to help or advise you.

This could be information about how to complete a question or section or an instruction to send specific supporting documents.

These notes are in sections and numbered in the same way as the questions in the application form.

Read these notes – if you don't answer a question or section correctly or you don't include the documents we need this will delay any payments.

Alternative formats

All of our forms and guides are available in Braille, large print format or audio. If you need these, you can request them by emailing your name, address and details of the format you require to brailleandlargefonts@slc.co.uk or call **0141 243 3686** (this number is only for alternative format requests).

Section 1 Your details

1.1 Change of name

If your name has changed since your passport or birth certificate was issued you need to prove that your name has legally changed.

You need to send us one of the following:

- your change of name deed; or
- your marriage certificate or civil partnership documentation; or
- a final or conditional order; or
- your divorce certificate or dissolution order.

1.5 National Insurance number

Any payment of your loan will be withheld until you provide your UK National Insurance number, unless you're a European Union student.

If you've never been given a National Insurance number, leave the National Insurance number box blank. We'll contact you if you need to take any action to obtain a National Insurance number. If in the meantime you get a National Insurance number, let us know as soon as possible.

Section 2 Your previous study

2.2 Qualification gained

If you have a:

- Higher Doctorate (e.g. DLitt, DSc, DTech, LLD, DD, DMus, DMedSc)
- Doctoral degree (e.g. PhD/DPhil, EdD, DBA, DClinPsy)

you are not eligible to receive a Postgraduate Doctoral Loan.

Section 3 Your postgraduate doctoral course

3.1 A full Postgraduate Doctoral course

If you are using previous study or experience to bypass part of your course and top up to a doctoral degree you can't receive Postgraduate Doctoral funding.

Your course is not a full doctoral degree if it is one of the following:

- Doctorate by publication
- Higher Doctorate

If you are unsure if you are studying a full Postgraduate Doctoral course you should ask your university or college.

3.2 Course applied for

Course duration

You should select the number of years you expect it will take to complete your course. If you need to you can change your course length at a later date.

3.3 Social work bursary

Students are not eligible for a Postgraduate Doctoral Loan if they're in receipt of a social work bursary. If you're unsure if you can apply for this, you need to speak to your university.

If you have applied for this and been rejected you need to send your rejection letter with your application. We can't accept your application without this.

3.4 NHS bursary

Students are not eligible for a Postgraduate Doctoral Loan if they're getting an NHS bursary. If you're unsure if you can apply for this, you need to speak to your university.

3.5 Research Council Funding

Students are not eligible for a Postgraduate Doctoral Loan if they're able to get Research Council Funding. If you're unsure if you can apply for this, you need to speak to your university or college.

Section 3 Your postgraduate doctoral course – continued

3.6 Distance Learning

Are you studying on a distance learning course because you or a member of your family are in the armed forces?

If you are not studying distance learning due to you or a family member being in the armed forces you must be living in Wales on the first day of your course to be eligible for a Postgraduate Doctoral Loan.

Are you studying on a distance learning course because you or a member of your family are in the armed forces?

You may be eligible for support to study a distance learning course if you or your family member is currently serving both in and outside of the UK in one of the following:

- The Naval Service (Royal Navy and Royal Marines)
- The Army
- The Royal Air Force
- The Royal Military Police
- The Gurkhas

The following family members will be eligible students:

- a spouse or civil partner living with a member of the UK Armed Forces serving outside of Wales
- a child, step-child or adoptive child under the age of 25 living with a member of the UK Armed Forces serving outside Wales
- a dependant parent living with either;
 - a child who is a member of the UK Armed Forces serving outside of Wales
 - the child's spouse or civil partner who is a member of the UK Armed Forces serving outside of Wales

If you are studying in a different country from where you or your family member are posted you can only get a Postgraduate Doctoral Loan if you study less than half of your course in that country.

What you need to send

You need to send a letter confirming your name and your address, or British Forces Post Office address.

If your family member is in the Armed Forces, you need to send a letter confirming the following:

- their name;
- their address or British Forces Post Office (BFPO) address;
- your name;
- their relationship to you.

The letter you send must be stamped, signed and dated by the Armed Forces Unit Records Officer. We can't accept a photocopy. We recommend that you use your BFPO address for all correspondence.

Section 4 Your residency information

4.1 & 4.2 UK national

You are a UK national if you have a UK passport or are eligible to apply for one.

If you have provided your UK passport details in section 4, you do not need to send any further evidence of your UK nationality.

If it has expired, or is about to expire, you need to send:

- your original birth or adoption certificate

Armed forces

If you, your parent(s) or partner are members of 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.

We can accept certified photocopies of your residency evidence, stamped with your unit stamp. You should use your BFPO address for all correspondence.

4.3 Irish citizen

You must send your original ROI passport or national identity card.

If you hold a UK passport, you should provide your passport details in section 4 as you do not need to send further evidence of your nationality.

4.4 Family member of a UK national

By family member, you must be the:

- husband, wife, civil partner;
- child, step-child or other direct descendant

of a UK national.

A direct descendant is defined as the biological child, grandchild, great-grandchild and so on, of a person. For example, you are a direct descendant of your mother, your grandmother, your great-grandmother, and so on.

If you answer 'Yes' to this question, you must provide evidence to show you are the family member of a UK national by sending their passport.

You must also send proof of your relationship to the UK national.

This may be:

- your marriage or civil partnership certificate; **or**
- a birth certificate showing your name and the UK national's name; **and**
- the marriage or civil partnership certificate if you or the UK national are a step-child.

If you are a child, step-child or other direct descendant of a UK national, you must be under 21 or dependent on the person or the person's spouse or civil partner.

Section 4 Your residency information – continued

4.5 & 4.6 Family member of an Irish citizen or person of Northern Ireland

By family member, you must be the:

- husband/wife/civil partner;
- parent(s)/step-parent(s) or other ascending direct relative;
- child, step-child or other direct descendant

of a person of Northern Ireland or Irish citizen.

If you are a child, step-child or other direct descendant you must be under 21 or dependent on the person of Northern Ireland or Irish citizen family member.

A direct descendant is defined as the biological child, grandchild, great-grandchild and so on, of a person. For example, you are a direct descendant of your mother, your grandmother, your great-grandmother, and so on.

A direct relative in the ascending line is defined as the biological parent, grandparent, great-grandparent and so on, of a person. You are a direct relative in the ascending line of your child, grandchild, great-grandchild, and so on.

You must provide evidence to confirm your family member is a person of Northern Ireland and your relationship to them by sending their original ROI or UK passport and your birth certificate or marriage certificate that shows your relationship to them.

You must provide evidence to confirm you're the family member of an Irish citizen and your relationship to them by sending their original ROI passport and your birth certificate or marriage certificate that shows your relationship to them.

To prove your immigration status, you need to provide us with confirmation of your EU Settlement Scheme status from the Home Office with a share code. Go to **www.gov.uk/view-prove-immigration-status** to generate the code. Once generated, the code will expire after 30 days. You should return your application form within 10 days of generating the share code.

We will use your share code to confirm your identity and residency status with the Home Office. When you give us your share code you do not need to send identity evidence unless it is required as proof of relationship.

We will still need identity evidence from your husband, wife, civil partner, parent, step-parent, direct ascending relative, child, step-child or direct descendant.

Section 4 Your residency information – continued

4.7 Settled or pre-settled status under the EU Settlement Scheme

By family member, you must be the:

- husband, wife, civil partner;
- parent(s)/step-parent(s) or other direct ascending relative;
- child, step-child or other direct descendant

of an EU national.

A direct descendant is defined as the biological child, grandchild, great-grandchild and so on, of a person. For example, you are a direct descendant of your mother, your grandmother, your great grandmother, and so on.

A direct relative in the ascending line is defined as the biological parent, grandparent, great-grandparent and so on, of a person. You are a direct relative in the ascending line of your child, grandchild, great-grandchild, and so on.

You will need to send your valid passport, or valid national identity card (if this is proof of your nationality).

You will also need to prove your relationship to your family member by sending their national identity card or passport and your birth certificate or marriage certificate (if this shows proof of their nationality and your relationship to them). To prove your immigration status, you need to provide us with a share code. Go to

www.gov.uk/view-prove-immigration-status to generate the code. Once generated, the code will expire after 30 days. You should return your application form within 10 days of generating the share code.

We will use your share code to confirm your identity with the Home Office. When you give us your share code you do not need to send identity evidence unless it is required as proof of relationship.

Section 4 Your residency information – continued

4.8 EU national, family member of an EU national, UK national, or family member of a UK national who is a resident in Gibraltar

UK national

By family member, you must be the:

- husband/wife/civil partner;
- child or step-child or other direct descendant (you must be under 21 or dependent on the UK national)

of a UK national who is a resident in Gibraltar.

If you're a UK national, you must send your original UK passport, or original UK birth or adoption certificate.

If you're the family member of a UK national, you must:

- send your valid passport, or original birth or adoption certificate;
- provide evidence to confirm your family member is a UK national; and
- prove your relationship to your UK national family member by sending their original UK passport, or original UK birth or adoption certificate and your birth certificate or marriage certificate (if this shows proof of their UK nationality and your relationship to them).

EU national

By family member, you must be the:

- husband/wife/civil partner;
- parent(s)/step-parent(s) or other ascending direct relative;
- child or step-child or other direct descendant (must be under 21 years of age or dependent on the EU national)

of an EU national who is a resident in Gibraltar.

If you're an EU national, you must send your valid EU passport, or valid national identity card (if this is proof of your EU nationality).

If you're the family member of an EU national, you must:

- send your valid passport, or valid national identity card (if this is proof of your nationality);
- provide evidence to confirm your family member is an EU national; and
- prove your relationship to your EU national family member by sending their national identity card or passport and your birth certificate or marriage certificate (if this shows proof of their EU nationality and your relationship to them).

Section 4 Your residency information – continued

4.9 Child of a Swiss national

To get a Postgraduate Doctoral Loan as the child of a Swiss national, your Swiss national parent must be living/have lived in the UK on the first day of the first academic year.

The first day of your academic year is:

- 1 September, where your course begins on or after 1 August and before 1 January;
- 1 January, where your course begins on or after 1 January and before 1 April;
- 1 April, where your course begins on or after 1 April and before 1 July;
- 1 July, where your course begins on or after 1 July and before 1 August.

To get student finance as a child of a Swiss national, your parent or step-parent must have settled or pre-settled status through the EU Settlement Scheme, and be resident in the UK on the first day of the academic year. We need a signed letter from your Swiss national parent stating their UK address, and that they lived there on the first day of the first academic year.

They must also send one of the following documents:

- bank statement
- payslip
- tenancy agreement/mortgage statement
- utility bill
- local authority correspondence
- government department correspondence

You must have pre-settled status and be ordinarily resident in the UK, Gibraltar, the EEA or Switzerland for the three years prior to the first day of your first academic year.

To prove your immigration status, you need to provide us with a share code. To prove your parent or step-parent's immigration status, you need to provide us with their date of birth and share code.

Go to www.gov.uk/view-prove-immigration-status to generate the codes. Once generated, the codes will expire after 30 days. You should return your application form within 10 days of generating the share code.

We will use your share code to confirm your identity and residency status with the Home Office. When you give us your share code you do not need to send identity evidence unless it is required as proof of relationship.

Section 4 Your residency information – continued

4.10 EEA or Swiss national worker

To prove your immigration status, you need to provide us with confirmation of your EU Settlement Scheme status from the Home Office with a share code. Go to **www.gov.uk/view-prove-immigration-status** to generate the code. Once generated, the code will expire after 30 days. You should return your application form within 10 days of generating the share code.

We will use your share code to confirm your identity and residency status with the Home Office. When you give us your share code you do not need to send identity evidence unless it is required as proof of relationship.

You do not need to provide a share code if:

- you are an Irish citizen; or
- you have a Frontier Worker permit.

You need to send:

- a completed Postgraduate Doctoral Loan UK Employment Status form

The Postgraduate Doctoral Loan UK Employment Status form is available to download at

www.studentfinancewales.co.uk/pgfinance

Complete and return this additional form with any supporting documents along with your main application form to ensure that your funding can be in place as soon as possible.

If you can't return your additional form with your main application form, get it to us as soon as possible. We won't be able to confirm if you can get Postgraduate Doctoral Loan without this additional completed form.

Section 4 Your residency information – continued

4.11 Family member of a European Economic Area (EEA) national or Swiss national

By family member, you must be the:

- husband, wife, civil partner;
- parent(s), step-parent;
- child or step-child
- other direct ascending or descending line family member (only applicable to EEA worker family members)

of the EEA or Swiss national.

If you are the parent or other direct ascending line relative of the worker, you must be dependent on them.

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

A direct descendant is defined as the biological child, grandchild, great-grandchild and so on, of a person. For example, you are a direct descendant of your mother, your grandmother, your great-grandmother, and so on.

A direct relative in the ascending line is defined as the biological parent, grandparent, great-grandparent and so on, of a person. You are a direct relative in the ascending line of your child, grandchild, great-grandchild, and so on. Other family relationships are excluded from the definitions above.

To prove your immigration status, you need to provide us with a share code. To prove your family member's immigration status, you need to provide us with their date of birth and share code. Go to

www.gov.uk/view-prove-immigration-status to generate the codes. Once generated, the codes will expire after 30 days. You should return your application form within 10 days of generating the share codes.

We will use your share code to confirm your identity with the Home Office. When you give us your share code you do not need to send identity evidence unless it is required as proof of relationship. We will still need identity evidence from your family member.

Your family member does not need to provide a share code if they have a Frontier Worker permit or are an Irish citizen.

Section 4 Your residency information – continued

4.11 Family member of a European Economic Area (EEA) national or Swiss national (continued)

You need to send:

- a completed Postgraduate Doctoral loan UK Employment Status form

The Postgraduate Doctoral loan UK Employment Status form is available to download at

www.studentfinancewales.co.uk/pgfinance

Complete and return this additional form with any supporting documents along with your main application form to ensure that your funding can be in place as soon as possible.

If you can't return your additional form with your main application form, get it to us as soon as possible. We won't be able to confirm if you can get Postgraduate Doctoral loan without this additional completed form.

4.12 Child of a Turkish worker who is working in the UK

To apply for a loan as the child of a Turkish worker, your Turkish parent must be working in the UK on the first day of your course.

You must also be living in the UK on the first day of the first academic year of your course and have lived in the UK, the EEA, Turkey, Gibraltar or Switzerland for 3 years before the start of your course.

You need to prove your identity, send us:

- your original valid passport

You also need to send proof of your Turkish parent's nationality, send us one of the following:

- their original valid passport; or
- their valid national identity card

And proof of your relationship, send us:

- a birth certificate

You also need to send proof of your Turkish parent's employment in the UK, for example send us:

- a contract of employment

And you also need to send your Turkish parent's proof of the extension of their Leave to Remain in the UK after 31 December 2021 from the Home Office.

All evidence items you send must be **originals**.

Section 4 Your residency information – continued

4.13 Afghan Relocations and Assistance Policy (ARAP) or the Afghan Citizens Resettlement Scheme (ACRS)

If you or your:

- husband, wife, civil partner;
- parent, step-parent

have been granted leave under the Afghan Relocations and Assistance Policy (ARAP) or the Afghan Citizens Resettlement Scheme (ACRS), you will have received a letter from the Home Office confirming this.

You need to prove your identity, send us:

- Original valid Home Office travel document; or
- Original Biometric Residency Permit; or
- Original valid passport.

You also need to send one of the following as proof of residency status:

- Original Home Office travel document; or
- Original Biometric Residency Permit; or
- Original Immigration Status Document; or
- Original Home Office letter confirming the category of leave and the date this was granted.

We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.

You should also send evidence of your relationship to the person who holds the status if it is not you:

- a birth or marriage certificate.

Afghan Locally Employed Staff Ex-Gratia Scheme

This scheme is for previous employees of the UK government who resigned or were made redundant from their post. Afghan nationals relocated to the UK under this scheme are not eligible for student funding.

4.14 Settled status not granted under the EU Settlement Scheme

'Settled status' means that you can live in the UK permanently without the Home Office placing any restrictions on how long you may remain.

You are free from any restriction if any of the following apply:

- You are a British citizen
- You have been granted 'indefinite leave to enter or remain'.
- You have a right of abode in the UK.

Further information about the right of permanent residence and other immigration issues can be obtained from the Home Office.

You need to prove your current status, send us one of the following:

- your valid UK passport or a letter from the Home Office which confirms your immigration status; **or**
- your valid Biometric Residence Permit.

We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.

All evidence items you send must be **originals**.

Section 4 Your residency information – continued

4.15 Limited leave to enter or remain under a Ukraine Scheme

4.16 Refugee status

If you or your:

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

has successfully applied for refugee status in the UK under the terms of the 1951 UN Convention Relating to the Status of Refugees and you, or they, have been granted refugee status, the Home Office will have sent you, or them, a letter and an immigration status document confirming this.

If you are claiming student finance as the child or step-child of a refugee, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming student finance as the husband, wife or civil partner of a refugee, you must have been their husband, wife or civil partner at the time of their application for asylum.

You need to prove your current status, send us one of the following:

- your valid Biometric Residence Permit; or
- your valid passport with a vignette; or
- your permission to travel document.

We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.

All evidence items you send must be **originals**.

If you have been granted refugee status, send us:

- a Home Office letter that confirms your status and an immigration status document, for example:
- your original passport; **or**
- your valid Biometric Residence Permit.

We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.

If your family member has been granted refugee status, send us:

- a Home Office letter confirming their status **and** an immigration status document showing their refugee status, for example:
- their original passport; **or**
- their valid Biometric Residence Permit.

We will only use their Biometric Residence Permit to validate their identity and residency status, no other data from it will be used or stored.

You also need to send us proof of your relationship, send us:

- a birth or marriage certificate.

All evidence items you send must be **originals**.

Section 4 Your residency information – continued

4.17 Humanitarian Protection

If you or your:

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

have been granted Humanitarian Protection, you, or they, will have received a letter and an immigration status document from the UK Home Office confirming this.

If you are claiming student finance as the child or step-child of a person granted Humanitarian Protection, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming student finance as the husband, wife or civil partner of someone who has been granted Humanitarian Protection, you must have been their husband, wife or civil partner at the time of their application for asylum.

4.18 Stateless Person

If you are claiming student finance as the child or step-child of a person granted 'leave to remain' as a Stateless Person, 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 UK Home Office.

If you are claiming student finance as the husband, wife or civil partner of someone who has been granted 'leave to remain' as a Stateless Person, you must have been their husband, wife or civil partner at the time of their application.

If you have been granted Humanitarian Protection, send us:

- a Home Office letter that confirms your status and an immigration status document, for example:
- your original passport; or
- your valid Biometric Residence Permit.

We will only use your Biometric Residence Permit to validate identity and residency status, no other data from it will be used or stored.

If your family member has been granted Humanitarian Protection, send us:

- a Home Office letter confirming their status and an immigration status document showing their status, for example:
- their original passport; or
- their valid Biometric Residence Permit.

We will only use their Biometric Residence Permit to validate their identity and residency status, no other data from it will be used or stored.

You also need to send us proof of your relationship, send us:

- a birth or marriage certificate.

All evidence items you send must be **originals**.

If you have been granted Leave to Remain as a Stateless Person, send us:

- a Home Office letter and a Biometric Residence Permit.

We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.

If your family member has been granted Leave to Remain as a Stateless Person, send us:

- evidence to confirm your relationship to the person who has been granted Stateless Person status.
- a Home Office letter confirming their status and an immigration status document showing their status, for example:
- their original passport; or
- their valid Biometric Residence Permit.

We will only use their Biometric Residence Permit to validate their identity and residency status, no other data from it will be used or stored.

All evidence items you send must be **originals**.

Section 4 Your residency information – continued

4.19 Leave to enter or remain

If you or your:

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

has been granted 'Leave to enter or remain' status the Home Office will have sent you, or them, a letter and an immigration status document confirming this.

If you are claiming student finance as the child or step-child of a person granted 'Leave to enter or remain' status, 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' status, you must have been their husband, wife or civil partner at the time of their application for Leave to remain.

If you have been granted one of the eligible 'Leave to enter or remain' statuses listed in this question, send us:

- a Home Office letter that confirms your status and an immigration status document, for example:
- your original passport; or
- your valid Biometric Residence Permit.

We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.

If your family member has been granted one of the eligible 'Leave to enter or remain' statuses listed in this question, send us:

- a Home Office letter confirming their status and an immigration status document showing their refugee status, for example:
- their original passport; or
- their valid Biometric Residence Permit.

We will only use their Biometric Residence Permit to validate their identity and residency status, no other data from it will be used or stored.

You also need to send us proof of your relationship, send us:

- a birth or marriage certificate.

All evidence items you send must be **originals**.

Section 4 Your residency information – continued

4.20 Leave to remain as a victim of domestic violence or abuse

If you are claiming student finance as the dependent child or step-child of a person granted 'Leave to Remain' in the UK as a victim of domestic violence or abuse, 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 have been granted 'Leave to remain' in the UK as a victim of domestic violence or abuse, send us:

- a Home Office letter that confirms your status and an immigration status document, for example:
- your Biometric Residence Permit

We will only use your Biometric Residence Permit to validate your identity and residency status, no other data from it will be used or stored.

If you are the dependent child of somebody who has been granted leave to enter or remain in the UK as a victim of domestic violence or abuse, send us:

- a Home Office letter confirming their status and an immigration status document, for example:
- their Biometric Residence Permit

We will only use their Biometric Residence Permit to validate their identity and residency status, no other data from it will be used or stored.

You also need to send us proof of your relationship, send us:

- a birth or marriage certificate.

All evidence items you send must be **originals**.

Section 5 Your address history

5.1 & 5.2 Residency status

If you have refugee status you should provide your address details from the point your status was granted or up to a maximum of three years before the start of the academic year if your status was granted prior to that point.

Date study begins between	Date academic year begins
1 August until 31 December inclusive	1 September
1 January until 31 March inclusive	1 January
1 April until 30 June inclusive	1 April
1 July until 31 July inclusive	1 July

Section 8 Loan Declaration

Power of Attorney

If you cannot sign the form it must be signed on your behalf by your attorney. The Power of Attorney letter must be sent with the application before a signature from that attorney will be accepted.