

# Education Maintenance Allowance (EMA) 2021/22

## Application Form

 We welcome applications in Welsh.  
This won't lead to a delay in our response.

 [www.studentfinancewales.co.uk/ema](http://www.studentfinancewales.co.uk/ema)

# How to complete this application form

- Follow the instructions, we'll tell you what questions you need to answer and what ones you can skip.
- You'll need to have your bank, building society or credit union details to hand.
- Section 8 will ask about your household financial details. Depending on your situation, either your parent(s)/guardian(s) or you (and your partner, if you have one) will need to complete this section. Whoever completes this section will need their National Insurance number to hand.
- You need to complete all of the questions you're asked to. Any missing information will delay your application for EMA.
- Where we ask for evidence – we will need it before your application can be accepted. Any missing evidence will delay your application for EMA.



If your household income is £23,078 or more do not complete this application form – you may not be eligible for this allowance. If you're an eligible care leaver we won't need details of your income.

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

## Use the notes



Where you see this you should check the notes for specific **information** to help you complete a question or section.



Where you see this you need to send us **evidence** to support your application. Use the notes to find out exactly what you need to send. You should send **photocopies** of your evidence unless otherwise stated. We will return any original documents.

## How we process your data

To find out more about how your information is used and why, make sure you read our Information Usage Summary on page 3 of the accompanying notes.

## What if I can't send the evidence you need now?

Return your application without the evidence. By doing this we can make a start on your application, but we won't be able to pay you until we see the documents we've asked for. We'll write to you to confirm what documents we still need to see.

## 2021/22 Calendar

April 2021	Application forms available for download from <a href="http://www.studentfinancewales.co.uk/ema">www.studentfinancewales.co.uk/ema</a>	
June 2021	Return your application with all required evidence before <b>30 June 2021</b> to make sure your EMA is agreed and ready for the start of your first term.	
September 2021	<b>Term starts</b> - apply within <b>13 weeks</b> for your payments to be backdated to the start of your term. Applications outside <b>13 weeks</b> may not receive backdated payments.	
January 2022	<b>2022</b>	
August 2022	We need to have received your completed application form before <b>31 August 2022</b> for you to be eligible for EMA in academic year 2021/22.	



# Section 1 Agreements and consent

## 1.1 Tick the statement that applies to you and follow the instruction.

By authorised third party we mean someone who is authorised to act and/or receive payments on the student's behalf. Evidence is required such as documentation from a Local Authority or a Power of Attorney.

- I am the student completing this form myself. Complete the **Student Agreement** below.
-  I am an **authorised third party** who is **both**:
  - completing this form on behalf of the student because they are unable to **and**
  - authorised to hold funds on behalf of the student.Complete the **Third Party Agreement A** on page 4.
-  I am an **authorised third party** who is **only**:
  - completing this form on behalf of the student because they are unable to.Complete the **Third Party Agreement B** on page 4.
-  I am an **authorised third party** who is **only**:
  - authorised to hold funds on behalf of the student.Complete the **Third Party Agreement C** on page 4.

### Student Agreement

By signing this agreement you are confirming that:

- the information you will give on this form is correct and complete to the best of your knowledge and belief;
- you will submit supporting evidence in accordance with the accompanying notes;
- you understand that if you have provided details of your UK passport, SLC will verify those details with HM Passport Office;
- you understand that any attempt to dishonestly obtain EMA shall be treated as fraud and may result in criminal and/or civil proceedings against you; and
- where you have provided any personal information in relation to a third party, you have informed them of this.

Student full name (in BLOCK CAPITALS)

Student signature

Today's date  
Day      Month      Year

     -       -       -       -       -       -

►►► Now go to **Consent to share below**

### Consent to share

Important information if you live with your parent(s)/guardian(s) or a partner:

It is important that we know if you will let us talk about your application and award with your parent(s)/guardian(s) or partner. We can't give out information about your application or award to anyone without your consent.

- I consent to the EMA Wales customer services team providing details of the progress of my application and award to the person named as person 1 in section 8 of this application form.

No  Yes

and (if applicable)

- I consent to the EMA Wales customer services team providing details of the progress of my application and award to the person named as person 2 in section 8 of this application form.

No  Yes

►►► Now go to **Section 2**



# Section 1 Agreements and consent (continued)

## Third Party Agreement A

By signing this agreement you are confirming that:

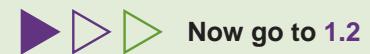
- the information you will give on this form is correct and complete to the best of your knowledge and belief;
- you will submit supporting evidence in accordance with the accompanying notes;
- you are authorised to act on the student's behalf and have enclosed evidence to prove this;
- the student named in **Section 2** is unable to have a bank, building society or credit union account in his/her own name;
- you will provide correct bank, building society or credit union details in your own name;
- you are authorised to hold funds on the student's behalf and have enclosed evidence to prove this;
- you will use any EMA payments made as a result of this application in accordance with the student's instructions; and
- you have read and understood these statements.

Authorised third party full name (in BLOCK CAPITALS)

Today's date  
Day      Month      Year

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Signature



Now go to 1.2

## Third Party Agreement B

By signing this agreement you confirm that:

- the information you will give on this form is correct and complete to the best of your knowledge and belief;
- you will submit supporting evidence in accordance with the accompanying notes;
- you are authorised to act on the student's behalf and have enclosed evidence to prove this; and
- you have read and understood these statements.

Authorised third party full name (in BLOCK CAPITALS)

Today's date  
Day      Month      Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Signature



Now go to 1.2

## Third Party Agreement C

By signing this agreement you confirm that:

- the student named in **Section 2** is unable to have a bank, building society or credit union account in his/her own name;
- you will provide correct bank details in your own name, are authorised to hold funds on the student's behalf and have enclosed evidence to prove this;
- you will use any EMA payments made as a result of this application in accordance with the student's instructions; and
- you have read and understood these statements.

Authorised third party full name (in BLOCK CAPITALS)

Today's date  
Day      Month      Year

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Signature



Now go to 1.2

# Section 1 Agreements and consent (continued)

## 1.2 Third party details

**e** You need to send evidence to prove your authorisation, read the notes to find out what you need to send.

You must contact us if the student's contact details change or if the student's nominated third party's details change during the academic year.

All correspondence will continue to be addressed directly to the applicant.

Forename(s)

Surname

Home address

Postcode

Home phone number

Mobile phone number

Email address

# Section 2 Student's details

## 2.1 Customer Reference Number

(if you don't have one yet, leave this blank)

## 2.2 Personal details

Complete these details exactly as stated on your birth certificate, passport or deed poll.

If any of your details change during the year you need to let us know.

**e** You need to send evidence of your identity, such as your original birth certificate. Read the notes for a full list of what you can send.

Title

 Mr  Mrs  Miss  Other

Forename(s)

Surname

Gender

 Male  Female

Date of birth

Day      Month      Year

 -  -    

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

## 2.3 What language would you like us to use when we communicate with you?

 English  Welsh

## 2.4 Contact details

**e** You need to send evidence, such as a photocopy of your household gas or electricity bill. Read the notes for a full list of what you can send.

The proof can be in your parent's/guardian's/partner's name.

Home address

Postcode

Home phone number

Mobile phone number (we may contact you by text message)

Email address

## 2.5 What was the name of the student's first school?

If you ever need to call us we'll ask you for the answer you give to this question as a security check, you need to remember the answer you give!

# Section 3 Your payment details

**3.1** Are you completing this section as an **authorised third party** who will hold the student's EMA payments on their behalf?

By authorised third party we mean someone who is authorised to act and/or receive payments on the student's behalf. Evidence is required such as documentation from a Local Authority or a Power of Attorney.

## 3.2 Student payment details

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

You must provide your details in full or we won't be able to pay you.

**No** – I am the student – go to **3.2**

**Yes** – go to **3.3**

## 3.3 Third party payment details

This account must be able to accept direct credits.

You must provide your details in full or we won't be able to pay you.

Account holder's name (student)

Sort code

 -  -    

Account number

Building society roll/credit union membership number  
(if applicable)

**Now go to Section 4**

Account holder's name (third party)

Sort code

 -  -    

Account number

Building society roll/credit union membership number  
(if applicable)

**Now go to Section 4**

## Section 4 Student's school or college details

4.1 Give details of where you intend to study from September 2021.

If you don't know where you'll study, give details of the school or college you want to attend.

If these details change you must let us know as soon as possible and no later than before the start of your first term.

Name of school or college

Campus (if applicable)

School or college address

Postcode

**Now go to Section 5**

# Section 5 Student's nationality and residency details

## 5.1 Are you a UK national?

**e** The easiest way for you to verify your identity is to provide your UK passport details. This means **you do not need to send us your passport**. Your passport must be currently valid and not expired.  
We will share the passport details you give us with HM Passport Office so that we can verify your identity.

### **e** UK passport expired?

If your UK passport has expired we can't accept this information as proof of your identity. You'll have to send alternative evidence as set out in the accompanying notes.

**No** – go to **5.2**

**Yes** – do you hold a valid UK passport?

**No** – you need to send supporting documents. Read the notes to see what you need to send then go to **6.1**

**Yes** – enter these details exactly as stated on your passport

Passport number

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Date of issue

Day                    Month                    Year

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Date of expiry

Day                    Month                    Year

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Forename(s)

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Surname

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**Now continue to 6.1**

## 5.2 Are you an Irish citizen?

**No** – go to **5.3**

**Yes** – Have you been ordinarily resident in the UK and Islands for the three years prior to the first day of the first academic year of your course?

**No** – go to **5.3**

**Yes** – you need to send supporting documents. Read the notes to see what you need to send then go to **6.1**

## 5.3 Are you the family member of a UK national?

**No** – go to **5.5**

**Yes** – go to **5.4**

## Section 5 Student's nationality and residency details (continued)

5.4 Have both you and your UK national family member been ordinarily resident in the UK, EEA, Switzerland and Gibraltar for the three years prior to the first day of the first academic year of your course?

**No** – go to **5.5**

**Yes** – Were both you and your UK national family member:

- living in the UK on 31 December 2020, after moving to the UK from the EEA or Switzerland on or after 1 January 2018; or
- living in the EEA or Switzerland on 31 December 2020?

**No** – go to **5.5**

**Yes** – you need to send supporting   
**e** documents. Read the notes to see what you need to send then go to **6.1**

5.5 Have you have been granted Settled status or Pre-settled status under the EU Settlement Scheme?

**No** – go to **5.6**

**Yes** – I have been granted settled status

**e** Have you been living in the UK and Islands for the three years prior to the first day of the first academic year of your course?

**No** – go to **5.6**

**Yes** – Please provide your Home Office share code:

go to **6.1**

**Yes** – I have been granted pre-settled status

**e** Are you an EU national **and** you have been living in the UK and Islands for the three years prior to the first day of the first academic year of your course?

**No** – go to **5.6**

**Yes** – please provide your:

Expiry date for Pre-settled status

Day      Month      Year

-  -

Home Office share code

go to **6.1**

## Section 5 Student's nationality and residency details (continued)

5.6 Are you the child of a Swiss national and both you and your parent/step-parent have been granted a status under the EU Settlement Scheme?

No – go to 5.7

Yes – Have you been ordinarily resident in the UK, EEA, Switzerland and Gibraltar for the three years prior to the first day of the first academic year of your course?

No – go to 5.7

Yes – Please provide your parent or step-parent's:

Date of birth

Day      Month      Year

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Expiry date for Pre-settled status - if applicable

Day      Month      Year

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Home Office share code

<input type="text"/>							
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Please provide your:

Expiry date for Pre-settled status - if applicable

Day      Month      Year

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Home Office share code

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go to 6.1

5.7 Are you or your:

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

an EEA or Swiss national who is working, has worked or is looking for work in the UK?

\*If you or a family member has a Frontier worker permit see notes now

No – go to 5.8

Yes – Have you been ordinarily resident in the UK, EEA, Switzerland, and Gibraltar for the three years prior to the first day of the first academic year of your course?

No – go to 5.8

Yes – Is the person who is working, has worked or is looking for work in the UK:

You – go to 5.7a

Your family member – go to 5.7b

## Section 5 Student's nationality and residency details (continued)

**5.7a** I am working, have worked or am looking for work

Provide details - You should also provide details of your previous study.

If you are currently working will you continue to work during your studies? If yes give details.

Expiry date for Pre-settled status

Day      Month      Year

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Home Office share code

[now go to 6.1](#)

**5.7b** My family member is working, has worked or is looking for work and is my:

\* Note you don't need to provide a sharecode if you or your family member has a Frontier Worker permit

husband/wife/civil Partner

parent(s)/step-parent(s)

child or step-child

Provide details of their employment

If they are currently working will they continue to work during your studies? If yes, give details of employment.

Please provide **your**:

Expiry date for Pre-settled status

Day      Month      Year

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Home Office share code

Please provide **your family member's**:

Date of birth

Day      Month      Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Status expiry

Day      Month      Year

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Home Office share code

[now go to 6.1](#)

## Section 5 Student's nationality and residency details (continued)

### 5.8 Do you have "settled status" in the UK?

By "settled status" we mean:

- you have been granted indefinite leave to remain; or
- you have a right of abode in the UK.

No – go to 5.9

Yes – Date granted status

**e**

Day      Month      Year

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Have you been ordinarily resident in the UK and Islands for three years prior to the first day of the first academic year of your course?

**No** – you need to send supporting documents. Please check "Break in residency" on page 5 of the notes, then go to 6.1

**Yes** – you need to send supporting documents. Read the notes to see what you need to send and then go to 6.1

### 5.9 Have you or a family member been granted Discretionary leave as a result of a failed asylum application?

No – go to 5.10

Yes – Home Office reference number

**e**

Date latest status granted

Day      Month      Year

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Date this status is due to expire

Day      Month      Year

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Have you lived outside the UK and Islands since your latest status was granted?

**No** – go to Section 7

**Yes** – go to 6.2

### 5.10 Have you or a family member been granted Discretionary leave (where no application for asylum has been made)?

No – go to 5.11

Yes – Home Office reference number

**e**

Date latest status granted

Day      Month      Year

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Date this status is due to expire

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Have you lived outside the UK and Islands since your latest status was granted?

**No** – go to Section 7

**Yes** – go to 6.2

## Section 5 Student's nationality and residency details (continued)

5.11 Have you or a family member been granted leave to remain in the UK on the grounds of family life?

**No** – go to **5.12**

**Yes** – Home Office reference number  
**e**

Date latest status granted  
Day      Month      Year  
 -  -

Date this status is due to expire  
Day      Month      Year  
 -  -

Have you lived outside the UK and Islands since your latest status was granted?

**No** – go to **Section 7**

**Yes** – go to **6.2**

5.12 Have you or a family member been granted leave to remain in the UK on the grounds of private life?

**No** – go to **5.13**

**Yes** – Home Office reference number  
**e**

Date latest status granted  
Day      Month      Year  
 -  -

Date this status is due to expire  
Day      Month      Year  
 -  -

Have you lived outside the UK and Islands since your latest status was granted?

**No** – go to **Section 7**

**Yes** – go to **6.2**

5.13 Have you or a family member been granted leave to remain outside the immigration rules?

**No** – go to **5.14**

**Yes** – Home Office reference number  
**e**

Date latest status granted  
Day      Month      Year  
 -  -

Date this status is due to expire  
Day      Month      Year  
 -  -

Have you lived outside the UK and Islands since your latest status was granted?

**No** – go to **Section 7**

**Yes** – go to **6.2**

## Section 5 Student's nationality and residency details (continued)

5.14 Have you or a family member been granted 'Leave to Remain' as a Stateless Person?

No – go to 5.15

Yes – Home Office reference number

**e**

Date latest status granted

Day      Month      Year

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Date this status is due to expire

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Have you lived outside the UK and Islands since your latest status was granted?

No – go to Section 7

Yes – go to 6.2

5.15 Have you or a family member been granted Refugee Status?

No – go to 5.16

Yes – Home Office reference number

**e**

Date latest status granted

Day      Month      Year

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Date this status is due to expire

Day      Month      Year

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Have you lived outside the UK and Islands since your latest status was granted?

No – go to Section 7

Yes – go to 6.2

5.16 Have you or a family member been granted Humanitarian Protection?

No – go to 5.17

Yes – Home Office reference number

**e**

Date latest status granted

Day      Month      Year

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Date this status is due to expire

Day      Month      Year

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Have you lived outside the UK and Islands since your latest status was granted?

No – go to Section 7

Yes – go to 6.2

## Section 5 Student's nationality and residency details (continued)

5.17 Are you the child of a Turkish Worker who is working in the UK?

**No** – go to **5.18**

**Yes** – has your Turkish worker parent/step-parent **e** been granted extended Leave to remain by the Home Office?

**No** – go to **5.18**

**Yes** – Were you and your Turkish worker parent/ step-parent living in the UK by the 31st of December 2020?

**No** – go to **5.18**

**Yes** – Have you been ordinarily resident in the UK, EEA, Turkey, Switzerland and Gibraltar for the three years prior to the first day of the first academic year of your course?

**No** – go to **5.18**

**Yes** – go to **6.2**

5.18 Have you been granted: 'leave to remain' in the UK under section 67 of the Immigration Act 2016 or are you the dependent child of someone who has?

**No** – go to **5.19**

**Yes** – Home Office reference number **e**

Date status granted  
Day      Month      Year  
  -   -

Date this status is due to expire  
Day      Month      Year  
  -   -

Have you lived outside the UK and Islands since your latest status was granted?

**No** – go to **Section 7**

**Yes** – go to **6.2**

## Section 5 Student's nationality and residency details (continued)

5.19 Have you been granted 'Calais leave' in the UK or are you the dependent child of someone who has?

No – go to 5.20

Yes – Home Office reference number

**e**

Date status granted

Day      Month      Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Date this status is due to expire

Day      Month      Year

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Have you lived outside the UK and Islands since your latest status was granted?

No – go to Section 7

Yes – go to 6.2

5.20 Have you been granted 'leave to remain' in the UK as the victim of domestic violence or abuse or are you the dependent child of someone who has?

No – go to 5.21

Yes – Home Office reference number

**e**

Date status granted

Day      Month      Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Date this status is due to expire

Day      Month      Year

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Now go to Section 7

5.21 Have you been granted 'leave to remain' as a person who has been a bereaved partner or are you the dependent child of someone who has?

No – go to 5.22

Yes – Home Office reference number

**e**

Date status granted

Day      Month      Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Date this status is due to expire

Day      Month      Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Now go to Section 7

## Section 5 Student's nationality and residency details (continued)

5.22 Tick the box which applies to you



**I have answered 'Yes' to at least one question in this section.**

You need to go back to the question you answered 'Yes' to and follow the instruction given there.



**I have answered 'No' to all the questions in this section.**

If you think you may be eligible but have answered 'No' to all the questions, please contact our helpline on **0300 200 4050**.

## Section 6 Student's residence history

6.1 Tell us your address details for the last three years before the start of the first academic year of your course.

If you need more space, you can attach additional pieces of paper to this form.

Now go to **Section 7**

Home address

Postcode

From

Day      Month      Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	---	----------------------	----------------------	---	----------------------	----------------------	----------------------	----------------------

To

Day      Month      Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Why were you there?

Home address

Postcode

From

Day      Month      Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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To

Day      Month      Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Why were you there?

## Section 6 Student's residence history (continued)

6.2 Give details of your residency from the date you received your last status from the Home Office.

**NOTE**

If you have been granted:

- 'indefinite leave to remain' as the victim of domestic violence or abuse;

or

- 'indefinite leave to remain' as a person who has been a bereaved partner

Only provide address history from when you received the status. You only need to provide up to a maximum of 3 years information.

Now go to **Section 7**

Home address

Postcode

From

Day  - Month  - Year

To

Day  - Month  - Year

Why were you there?

Home address

Postcode

From

Day  - Month  - Year

To

Day  - Month  - Year

Why were you there?

# Section 7 Student's independence details

7.1 Tick one of the following statements that will apply to you on the first day of the first academic year of your course.

- I am a care leaver/I live under Local Authority care or with foster parents – **go to 7.3**
- I receive Income Support, income-related Employment and Support Allowance or Universal Credit in my own name – **go to 7.3**
- I am responsible for a child – **go to 7.3**
- I am currently in custody/detention within the Youth Justice System – **go to 7.3**
- None of the above – **go to 7.2**

7.2 Do you live apart from your parent(s)/  
(i) guardian(s)?

- No** – you are a **dependent** student.  
**Your parent(s) or guardian(s) need(s) to complete the next section.**
- Yes** – you are an **independent** student.  
**You (and your partner, if applicable) need to complete the next section.**

7.3 **You are an independent student.**

e You need to send supporting documents to prove the statement ticked. Read the notes to see what you need to send, then **go to Section 11**.

# Section 8 Financial details

## Part A

**Section 8 is divided into four parts. Read the following for a quick summary of each part.**

### Part A

Tell us your name and some other personal information including your National Insurance number.

### Part B

Answer every question.

### Part C

Only complete if instructed.

### Part D

Answer every question.

### Who completes this section?

Question 7.2 told you who needs to complete this section for your application.

### How to complete this section

#### If you are a single parent/guardian of the student

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

#### If there are two parents/guardians in the student's household

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

#### If you're an independent student with a partner

Enter your information as Person 1, your partner needs to enter their information as Person 2.

#### If you're an independent student without a partner

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

#### If you're self assessed – read page 20 of the notes for more information.

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

### Data Sharing



We will share and check the details you give us with HM Revenue & Customs, allowing us to gain the most accurate information possible. This can only be done if you have a valid National Insurance (NI) number. This information will be used to work out if the student is eligible to get EMA based on household income. To find out more about how your information is used and why, make sure you read our Information Usage Summary on page 3 of the accompanying notes.

## Personal details

### Person 1

Relationship to student (if you're the student write n/a)

Forename

Surname

Please provide your NI number below

Date of birth

Day      Month      Year

go to Part B

### Person 2

Relationship to student

Forename

Surname

Please provide your NI number below

Date of birth

Day      Month      Year

go to Part B

# Section 8 Financial details (continued)

## Part B

### Financial information for tax year 2019-20

#### How to complete Part B

- Answer every question.
- Where you answer 'Yes' to a question you must give **gross** income amounts.
- Any amounts given must be for the tax year starting **6 April 2019** and ending **5 April 2020**.
- If you leave any question blank in **Part B** we will not be able to process this application.
- If you don't receive a specific type of income listed in a question, write 'n/a'.

#### Do I need to send any evidence of financial details with this application?

No, you don't need to send any evidence of your financial details now, but we may write out to request this at a later date.

#### What if my income has dropped since 2019-20?

**i** If your household income has permanently changed since tax year **2019-20**, read **e** page 20 of the notes for more information.

**8.1** Were you in receipt of Income Support or Income-related Employment and Support Allowance?

#### Person 1

Tax year 2019-20

No

Yes

**8.2** Were you in receipt of Universal Credit?

#### Tax year 2019-20

No

Yes

**8.3** Did you receive any income from salary, wages, taxable state benefits or from occupational or private pensions?

**i** Total income from salary/wages

**i** Total income from taxable state benefits

Total income from occupational pension(s)

If you receive a lump sum pension, only declare the amount you received that you paid tax on.

Total income from private pension(s)

If you receive a lump sum pension, only declare the amount you received that you paid tax on.

#### Tax year 2019-20

No – go to **8.4**

Yes – give details

£

£

£

£

#### Person 2

Tax year 2019-20

No

Yes

#### Tax year 2019-20

No

Yes

#### Tax year 2019-20

No – go to **8.4**

Yes – give details

£

£

£

£

## Section 8 Financial details (continued)

**8.4** Did you receive any income from a state retirement pension?

Total non-lump sum amount received

Total lump sum amount received

### Person 1

Tax year 2019-20

No – go to **8.5**

Yes – give details

£

£

### Person 2

Tax year 2019-20

No – go to **8.5**

Yes – give details

£

£

**8.5**  Did you receive any income from savings and investments?

Total interest from UK banks, building societies and unit trusts

Total income from UK life insurance gains, securities and partnerships

Total income from UK investments and dividends

Total income from foreign investment and dividends

Tax year 2019-20

No – go to **8.6**

Yes – give details

£

£

£

£

Tax year 2019-20

No – go to **8.6**

Yes – give details

£

£

£

£

**8.6**  Did you receive any taxable benefits in kind?

Total income from taxable benefits in kind

Tax year 2019-20

No – go to **8.7**

Yes – give details

£

Tax year 2019-20

No – go to **8.7**

Yes – give details

£

**8.7** Did you receive any other income during tax year 2019-20 that you have not told us about in **Part B**?

No – go to **Part D**

Yes – go to **Part C**

No – go to **Part D**

Yes – go to **Part C**

# Section 8 Financial details (continued)

## Part C

### Any other income

#### How to complete Part C

- Answer every question.
- Where you answer 'Yes' to a question you must give **gross** income amounts.
- Any amounts given must be for the tax year starting **6 April 2019** and ending **5 April 2020**.
- If you leave any question blank we will not be able to process this application.
- If you don't receive a specific type of income listed in a question, write 'n/a'.

**8.8** Did you receive any income from self-employment?

**8.9** Did you receive any income as a Minister of religion?

Total taxable income minus expenses that are not included on your P60 or P11D

**8.10** Did you receive any other taxable income or lump sums?

Total income received

**8.11** Did you receive any income from property lettings?

Total income received

#### Person 1

Tax year 2019-20

No – go to **8.9**

Yes – give details

£

£

#### Person 2

Tax year 2019-20

No – go to **8.9**

Yes – give details

£

£

Tax year 2019-20

No – go to **8.10**

Yes – give details

£

Tax year 2019-20

No – go to **8.10**

Yes – give details

£

Tax year 2019-20

No – go to **8.11**

Yes – give details

£

Tax year 2019-20

No – go to **8.11**

Yes – give details

£

Tax year 2019-20

No – go to **8.12**

Yes – give details

£

Tax year 2019-20

No – go to **8.12**

Yes – give details

£

## Section 8 Financial details (continued)

<p><b>8.12</b> Did you receive any income from UK trusts?</p> <p>Total income received</p>	<p><b>Person 1</b></p> <p>Tax year 2019-20</p> <p><input type="checkbox"/> No – go to <b>8.13</b></p> <p><input type="checkbox"/> Yes – give details</p> <p>£</p>	<p><b>Person 2</b></p> <p>Tax year 2019-20</p> <p><input type="checkbox"/> No – go to <b>8.13</b></p> <p><input type="checkbox"/> Yes – give details</p> <p>£</p>
<p><b>8.13</b> Did you receive any foreign income?</p> <p>Total income received</p>	<p>Tax year 2019-20</p> <p><input type="checkbox"/> No – go to <b>8.14</b></p> <p><input type="checkbox"/> Yes – give details</p> <p>£</p>	<p>Tax year 2019-20</p> <p><input type="checkbox"/> No – go to <b>8.14</b></p> <p><input type="checkbox"/> Yes – give details</p> <p>£</p>
<p><b>8.14</b> Did you receive any income from an overseas pension?</p> <p>Total income received</p>	<p>Tax year 2019-20</p> <p><input type="checkbox"/> No – go to <b>8.15</b></p> <p><input type="checkbox"/> Yes – give details</p> <p>£</p>	<p>Tax year 2019-20</p> <p><input type="checkbox"/> No – go to <b>8.15</b></p> <p><input type="checkbox"/> Yes – give details</p> <p>£</p>
<p><b>8.15</b> Did you receive any other overseas income and gains?</p> <p>Total income received</p>	<p>Tax year 2019-20</p> <p><input type="checkbox"/> No – go to <b>Part D</b></p> <p><input type="checkbox"/> Yes – give details</p> <p>£</p>	<p>Tax year 2019-20</p> <p><input type="checkbox"/> No – go to <b>Part D</b></p> <p><input type="checkbox"/> Yes – give details</p> <p>£</p>
		<p>go to <b>Part D</b></p>

# Section 8 Financial details (continued)

## Part D

### Income deductions

#### How to complete Part D

- Answer every question.
- Where you answer 'Yes' to a question you must give **gross** deduction amounts.
- Any amounts given must be for the tax year starting **6 April 2019** and ending **5 April 2020**.
- If you leave any question blank in **Part D** we will not be able to process this application.
- If you don't receive a specific type of deduction listed in a question, write 'n/a'.

**8.16** Did you pay any private pension contributions?

Don't include any income from a workplace pension.

Total amount you paid

#### Person 1

Tax year 2019-20

No – go to **8.17**

Yes – give details

£

#### Person 2

Tax year 2019-20

No – go to **8.17**

Yes – give details

£

**8.17** Did you pay any Additional Voluntary Contributions (AVCs)?

Total amount you paid

Tax year 2019-20

No – go to **8.18**

Yes – give details

£

Tax year 2019-20

No – go to **8.18**

Yes – give details

£

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

Total amount on which you claimed tax relief

Tax year 2019-20

No – go to **Section 9**

Yes – give details

£

go to **Section 9**

Tax year 2019-20

No – go to **Section 9**

Yes – give details

£

go to **Section 9**

# Section 9 Student's family details

9.1 Is your total household income £20,817 or less per year?

**No** – go to 9.2

**Yes** – go to Section 10

9.2 Is your household income £23,077 or less per year?

**No** – the applicant is not eligible for this  
 allowance. Do not continue with this application.

**Yes** – are there any other young people in your household who are:

- under the age of age 16 and qualify for Child Benefit  
**or**
- aged 16, 17, 18, 19 or 20 on 1 September 2021, are in full-time further education and qualify for Child Benefit?

**No** – the applicant is not eligible for this  
 allowance. Do not continue with this application.

**Yes** – go to 9.3

9.3 Give details of any young people or children in your household who are:

- under the age of 16 and qualify for Child Benefit  
**or**
- aged 16, 17, 18, 19 or 20 on 1 September 2021, in full-time further education and qualify for Child Benefit.

**e** You need to send evidence for **each** young person you state. Read the notes to see what you need to send.

If you need more space, you can attach additional pieces of paper to this form.

Full name

Date of birth

Day                    Month                    Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Full name

Date of birth

Day                    Month                    Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Full name

Date of birth

Day                    Month                    Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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# Section 10 Parent(s)/guardian(s)/partner agreement

## How to complete this section

### If you are a single parent/guardian of the student

Read and understand the agreement below then sign and date as **Person 1**, leave **Person 2** blank.

### If there are two parents/guardians in the student's household

Read and understand the agreement below then sign and date both **Person 1** and **Person 2**.

### If you're an independent student with a partner

The partner needs to read and understand the agreement below then sign and date as **Person 2**, leave **Person 1** blank.

### If you're an independent student without a partner

Don't complete this section – you've already signed your agreement in **Section 1**, continue on to **Section 11**.

## Parent/Guardian/Partner Agreement

### By signing this agreement you are confirming that:

- the information you have given on this form is correct and complete to the best of your knowledge and belief;
- you understand that any attempt to dishonestly obtain EMA shall be treated as fraud and may result in criminal and/or civil proceedings against you; and
- you have read and understood these statements.

### Person 1

Full name (in BLOCK CAPITALS)

Signature

Today's date

Day      Month      Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>
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### Person 2

Full name (in BLOCK CAPITALS)

Signature

Today's date

Day      Month      Year

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Now pass this form back to the student

# Section 11 Finalising your application



This must be completed by the student

**11.1** Have you signed and dated your agreement in **Section 1**?



**No** – you must sign the agreement, we can't process your application without it.



**Yes**

**11.2** Have you answered all the questions that apply to you?



**No** – if you don't complete a section or question you've been asked to, this could delay your EMA payments.



**Yes**

**11.3** Did your parent(s)/guardian(s) or your partner complete **Sections 8, 9 and 10**?

Remember – **Section 7** told you if you needed to do this or not.



**No** – if you have been instructed that these sections are to be completed, and you forget to do this, it will delay any EMA payments you could get.



**Yes**

**11.4** Have you included **all** the evidence we've asked for?

All students need to send evidence of their identity and home address for **Sections 2 and 5**.

Some students will also need to send evidence of their independence details for **Section 7**.

Your parent(s)/guardian(s) or your partner will need to send evidence of any young people they mentioned in **Section 9**.

Use the notes to check you've included the right evidence for each section.



**No** – if there's some supporting evidence you can't give us right now, you can send your application back without it.

This means we can make a start on your application and we'll contact you for the evidence later but we won't be able to confirm if you can get EMA payments until you've sent all your evidence.



**Yes** – read the '3 things to remember' information on the next page before returning your application form.

# 3 things to remember



## 1 Get paid on time!

Send us your completed application form as soon as you can and as far in advance of your course start date as possible so that there is plenty of time for us to contact you to finalise your EMA application before you start your studies.

Don't worry if you don't have all your supporting documentation right now, still send us your completed form so we can start to process it. Just send in your evidence as soon as you can after this in order to avoid any delay.

Make sure you send us your completed application form with all appropriate evidence by **June 2021** at the latest if you want to have your EMA application assessed and ready for the start of your course.



## 2 Check the postage

Make sure that you've included all evidence with your completed application, had it weighed and paid the correct postage costs.

**Remember to ask for proof of postage!**



## 3 Send the form

Return your completed form and supporting evidence to the address below:

**EMA Customer Services**  
PO Box 5596  
Glasgow  
G52 9BR

# Confidential

## Equal opportunities questionnaire

### How to complete this section

The following questions are voluntary – you do not have to answer them. Whether you answer them or not will not affect your application for an EMA. If you do answer, the information may be used to help the Welsh Government develop its policies in the future.

1 Do you consider yourself to have a disability?

Yes  No

2 What do you consider your nationality identity to be?  
(Choose as many or as few as apply.)

Welsh  British  
 Irish  Scottish  
 English  Other

3 Choose ONE section from A to E, then tick the appropriate box to indicate your ethnic group.

**A**  White  
 British  
 Any other white background

**B**  Mixed  
 White and Black Caribbean  
 White and Black African  
 White and Asian  
 Any other mixed background

**C**  Asian or Asian British  
 Indian  
 Pakistani  
 Bangladeshi  
 Any other Asian background

**D**  Black or Black British  
 Caribbean  
 African  
 Any other black background

**E**  Chinese or other ethnic group  
 Chinese  
 Any other