

2022/23

PTMNN

Application notes for new part-time students

We welcome applications in Welsh. This won't lead to a delay in our response. You can also apply online at www.studentfinancewales.co.uk

About these notes

These notes should be read with your Application form for new part-time students.

Returning your form

Send your completed form and any documents to:

Student Finance Wales
PO Box 211
Llandudno Junction
LL30 9FU

Timescale for returning your form

Your form should be returned within nine months of the start of your academic year, otherwise you may lose your entitlement to student finance.

Make sure you pay the correct postage.

Find out more

You can find out more information about part-time student finance by:

- going to www.studentfinancewales.co.uk
- reading our part-time guides
- speaking to your university or college
- calling us on **0300 200 4050**

Other information

Alternative formats

You can order forms and guides in Braille, large print or audio by emailing your name, address and Customer Reference Number, if you have one, along with what form and format you require to: brailleandlargefonts@slc.co.uk or you can call us on **0141 243 3686**. Please note the email address and telephone number can only deal with requests for alternative formats of forms and guides.

1 Your personal details

1.1 Customer Reference Number



Your Customer Reference Number is your personal reference number and is 11 digits long. You'll have one of these if you've previously had a student loan or any other student finance from the Student Loans Company Limited (SLC). You may also have one if you've given financial information for another student's application. If you don't have one, or don't know what your Customer Reference Number is, leave this blank.

1.2 Personal details



You need to send your:

- Change of name deed, if appropriate.
- Marriage/divorce certificate, if appropriate.
- Civil partnership/dissolution order, if appropriate.
- A final or conditional order, if appropriate.

1.3 National Insurance number



If you have a National Insurance number but don't provide it, payment of your loan(s) will be withheld and you'll have to fund your own tuition fees until you've resolved this.

You'll find your National Insurance number on any of the following:

- your National Insurance number card or letter; **or**
- a payslip; **or**
- an income tax document such as a P45 or P60.

If you've never been given a National Insurance number, leave the National Insurance number boxes blank. We'll contact you if you need to take any action to obtain a National Insurance number.

1.4 Identity evidence

If you've given your valid UK passport details you don't have to send any other evidence to confirm your identity.

If you've given us a share code to confirm your residency, you do not need to send any other evidence to confirm your identity.



If you don't have a UK passport or it has expired you need to send your:

- non-UK passport **or**
- original Biometric Residence Permit **or**
- original UK birth or adoption certificate.

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.

Your original documents will be sent back to you as soon as possible.

1 Your personal details continued

1.7 Marital status



You are 'living with a partner' if you are sharing a home with your partner but you are not married or in a civil partnership. It does not matter whether you are of the same sex or of opposite sex.

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

Separated, divorced or dissolved civil partnership



You need to send:

- Decree Absolute **or**
- Dissolution order **or**
- A final or conditional order, **or**
- A letter from your solicitor confirming your status

Widowed or surviving civil partner

- Original death certificate

2 Previous support and qualification history

2.2 Honours degree from UK educational institution



If you already hold an honours degree from a UK institution you may not be eligible for a Maintenance Loan, Tuition Fee Loan, Welsh Government Learning Grant or Grants for Dependants.

3 Residence

3.1 UK national



If you have provided your UK passport information or birth certificate as part of section 1, you do not need to send any further evidence of your UK nationality.

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 permanently live 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.

3.2 Irish citizen



If you answer 'Yes' to this question, you must send your ROI or EU passport.

If you hold a UK passport, you should provide your passport details in section 1 as you do not need to send further evidence of your nationality.

3.3 Family member of a UK national



By family member, you must be the:

- husband, wife, civil partner;
- 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.

For the direct descendants of UK nationals, the term 'child' means a person 'under the age of 21; or a dependant of the person or the person's spouse or civil partner.'

3 Residence – continued

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



If you have pre-settled status, you must provide evidence to show you are an EU national, by sending your EU passport or national identity card. You only need to provide identity evidence if a share code cannot be provided.

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.

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.

3 Residence – continued

3.5 Child of a Swiss national



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



If you answer 'Yes' to this question, you must provide evidence to show that you are the child of a Swiss national by sending us your parent's passport or national identity card. You must also send us your birth certificate or equivalent, as proof of your relationship.

To get student finance as the child of a Swiss national, your Swiss national parent must 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 live there on the first day of the 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.

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. 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.

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 parent or step-parent.

3 Residence – continued

3.6 EEA or Swiss worker



My family member is my:

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

of the EEA or Swiss 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.

To get student finance as the family member of an EEA or Swiss national who is working, has worked or is looking for work in the UK, you and your family member must have been granted pre-settled status through the EU Settlement Scheme.

3.6 EEA or Swiss worker



If you are the family member of the EEA or Swiss national, they must provide proof of their nationality with their passport or national identity card. As proof of your relationship, you must also send your birth certificate and/or marriage or civil partnership certificate.

As proof of the current employment status of the EEA or Swiss national, one of the following must be provided as evidence:

- a P60 or a letter from employer if currently working.
- audited accounts, tax returns or details of income if self-employed.
- a letter from employer confirming the intention to continue working whilst studying.
- P45, P60 or letter from previous employer if currently looking for work or previously worked in the UK.

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

For the direct descendants 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.

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. 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.

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.

You do not need to provide a share code if:

- you are an Irish citizen; or
- you or your family member is a Frontier Worker.

3 Residence – continued

3.7 Child of a Turkish worker



To get student finance 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 be ordinarily resident in the UK, Gibraltar, the EEA, Switzerland or Turkey for three years prior to the first day of your first academic year.



Please send your Home Office letter and Biometric Residence Permit.

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

You must provide evidence to show that you are the child of a Turkish worker by sending us your parent's passport or national identity card. You must also send us your birth certificate or equivalent.

As proof of your Turkish parent's employment in the UK, you must send their contract of employment.

3.8 Afghan Relocation and Assistance Policy (ARAP) or the Afghan Citizens Resettlement Scheme (ACRS)



If you or your:

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

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

We need one of the following as proof of identity:

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

and 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.

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.

3 Residence – continued

3.9 Settled status



'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 remain'; or
- 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.



If you do not have a British passport or Biometric Residence Permit which confirms your immigration status, but you have a letter from the Home Office which does, please send this original letter with your application form.

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

3.10 Limited leave to enter or remain under a Ukraine Scheme



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.

3.11 Refugee status



If you or your:

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

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



Please send the Home Office letter and immigration status document, normally a passport or Biometric Residence Permit, of the person who holds refugee status. You should also send evidence of your relationship to the person who holds refugee status if it is not you.

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 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.

Expiry date

If you or your:

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

were granted refugee status without an expiry date you should mark the expiry date box as N/A (not applicable).

3.12 Stateless Person



If you or your:

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

have been granted 'leave to remain' as a Stateless Person in the UK, you or they, will have received a letter and an immigration status document from the UK Home Office confirming this.



Please send the Home Office letter and Biometric Residence Permit of the person who has been granted 'leave to remain' as a Stateless Person. You should also send evidence of your relationship to the person who has been granted 'leave to remain' as a Stateless Person if it is not you.

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 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.

3.13 Leave to enter or remain & 3.14



If you or your:

- husband, wife, civil partner
 - parent(s), step-parent
- have been granted
- ‘leave to enter or remain’ in the UK on the grounds of family or private life; **or**
 - ‘leave to enter or remain’ in the UK following a failed application for ‘leave to enter **or** remain’ on the grounds of family or private life on the grounds of Article 8 of the European Convention on Human Rights (ECHR); **or**
 - Discretionary Leave as a result of a failed asylum application; **or**
 - Discretionary Leave where no application for asylum has been made; **or**
 - Humanitarian Protection

the Home Office will have sent you, or them, a letter and an immigration status document confirming this.



Please send the Home Office letter and immigration status document, normally a passport or Biometric Residence Permit, of the person who has been granted leave to enter or remain. You should also send evidence of your relationship to the person who has been granted leave to enter or remain if it is not you.

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 claiming student finance as the dependent child or step-child of a person granted leave to enter or remain, you will only be considered a ‘child’ if you were under the age of 18 at the time of your parent’s application to the Home Office.

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

3 Residence – continued

3.15 Section 67 of the Immigration Act 2016



If you have been granted 'leave to remain' in the UK under section 67 of the Immigration Act 2016 or are the dependent child of someone who has, you will have received a letter and an immigration status document from the UK Home Office confirming this.



Please send the Home Office letter and Biometric Residence Permit of the person who has been granted 'leave to remain' under section 67 of the Immigration Act 2016. You should also send evidence of your relationship to the person if you are the dependent child of someone who has been granted 'leave to remain' in the UK under section 67 of the Immigration Act 2016.

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.

3.16 Calais leave



If you have been granted Calais leave in the UK, or are the dependent child of someone who has, you, or they, will have received an immigration status document from the UK Home Office confirming this.



Please send the Biometric Residence Permit of the person who has been granted Calais leave. You should also send evidence of your relationship to the person who has been granted Calais leave if it is not you.

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 claiming student finance as the dependent child or step-child of a person granted Calais leave, 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.

3 Residence – continued

3.17 Victim of domestic violence or abuse



If you or your parent/step-parent have been granted 'leave to remain' in the UK as a victim of domestic violence or abuse, you, or they, will have received a letter from the Home Office confirming this.



Please send the Home Office letter and your Biometric Residence Permit. You should also send evidence of your relationship to the person who has been granted 'leave to remain' in the UK as a victim of domestic violence or abuse if it is not you.

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 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.

3.18 Bereaved partner



If you or your parent/step-parent have been granted 'leave to remain' in the UK as a person who has been a bereaved partner, you, or they, will have received a letter from the Home Office confirming this.



Please send the Home Office letter and your Biometric Residence Permit. You should also send evidence of your relationship to the person who has been granted 'leave to remain' as a person who has been a bereaved partner if it is not you.

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 claiming student finance as the dependent child or step-child of a person granted 'leave to remain' in the UK as a bereaved partner, 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.

3 Residence – continued

3.21 Residency 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

If you answered 'No' to all the questions in this section, you are not eligible for student finance from Student Finance Wales. You may still be able to get Tuition Fee only funding if for example, you are an EU/EEA national or an Irish citizen. For more information on Fee Support only funding go to www.studentfinancewales.co.uk

4 About your university or college and course

4.8 Course credits



Each module you study is worth a number of credits. You should agree how many credits you'll study with your university or college.

If you can't confirm how many credits you'll be studying yet, we'll assess your application using the lowest amount of credits that can be studied on your course. You should contact us once you've agreed your credits with your university/college.

4.9 Tuition Fee amount charged



If you're not sure how much you're being charged for tuition fees, speak to your university or college to find out. You must specify an amount for your form to be accepted.

4.10 Initial Teacher Education



A part-time postgraduate Initial Teacher Education (ITE) course is a course taken after a first degree has been attained (Postgraduate Certificate in Education (PGCE) and equivalent courses).

4.11 Erasmus+, Turing Scheme or ILE



If you are undertaking a placement as part of the Turing Scheme, the Erasmus+ programme or the International Learning and Exchange Programme (ILE) (also known as Taith) you won't be eligible for tuition fees.

4.13 Distance learning for a reason related to a disability



If you're studying on a full-time distance learning course because you or your family member is currently serving in the Armed Forces outside of Wales, you **don't** have to send evidence of a disability.

4.14 Armed Forces



You may be eligible for support to study a distance learning course outside of Wales if you or your family member (who you live with) is currently serving outside Wales 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, co-habiting partner or civil partner living with a member of the UK Armed Forces serving outside 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 dependent parent living with either;
 - a child who is a member of the UK Armed Forces serving outside Wales
 - the child's spouse, co-habiting partner or civil partner who is a member of the UK Armed Forces serving outside Wales.



If you are in the Armed Forces

You need to send a letter confirming your name, your address (or BFPO address) and which country you were ordinarily resident in before you were based at your current location. It must also confirm the country you're currently based in.

If your family member is in the Armed Forces

You need to send a letter confirming the following:

- their name
- their address (or BFPO address)
- your name
- their relationship to you
- if they're based overseas or in the UK but outside Wales
- if you have been ordinarily resident in the UK, which country they were ordinarily resident in before they were based at their current location
- if you've never been ordinarily resident in the UK, which country they signed up for the Armed Forces in

The letter you send must be signed, stamped and dated by the Armed Forces Unit Records Office.

5 Your loan request

5.1 Loan payments

i We'll pay your Tuition Fee Loan directly to your university or college in three instalments within the academic year. Each instalment of your Tuition Fee Loan will be paid after we receive confirmation from your university or college that you're in attendance on your course. The maximum Tuition Fee Loan you can borrow depends on where you're studying

Loan liability

i You'll be liable for your Tuition Fee Loan two weeks after the first day of term 1, and at the start of terms 2 and 3, not the dates the instalments are paid to your university or college.

Liability	% of total Tuition Fee Loan that you'll be liable for
Term 1	25%
Term 2	50%
Term 3	100%

Interest

i Interest is added to your loan balance from the day the first loan payment is made to your university or college. You can find out more about this and the current interest rate at www.gov.uk/repaying-your-student-loan

5.2 Maintenance Loan

i This loan is paid in instalments directly to you and is to help cover your living costs throughout the academic year.

Eligibility

i You must be under the age of 60 on the first day of the first academic year of your course to be eligible for a Maintenance Loan. Check the table on page 16 to find out when your academic year starts.

Payment allocation

i We'll work out how much Welsh Government Learning Grant you can get first then the rest of your student finance will be awarded as a Maintenance Loan. If you request more Maintenance Loan than you're entitled to, we'll award you the lower amount.

Applying for a loan at a later date or changing the amount requested

i You can apply for a Maintenance Loan, or Tuition Fee Loan at any time in the academic year provided you are within the time limit. The time limit for applying is usually nine months from the start of your academic year. You can apply for a Maintenance Loan, or Tuition Fee Loan or change the amount you originally requested at www.studentfinancewales.co.uk

6 Dependent and independent students

6.3 Care of a child

Having the care of a person under the age of 18 means that you look after a child and the child lives with you, irrespective of your relationship with the child.

A photocopy of the child's/children's birth certificate(s) and evidence that you have care of the child, for example, photocopied evidence that you are receiving Child Benefit, Child Tax Credit or the child element of Universal Credit.

6.4 Irreconcilable estrangement

You will normally be considered irreconcilably estranged from your parents if you have not had verbal or written contact with both of your biological or adoptive parents, or your only living parent before the start of your academic year, and this will not change.

You will not be considered irreconcilably estranged from your parents because:

- you do not get on with your parents;
- you do not live with them;
- your parents do not want to give details of their income; or
- your parents choose not to provide you with financial support.

In the legal care of a local authority or under a special guardianship order

If you have been in the custody or legal care of a Local Authority, or under a special guardianship order at any point between the ages of 14 and 16 (before the start of your course) but have been back in the legal care of your parents, you will still be considered independent.

You should only send us evidence of your household income if you're applying for any grants for dependants, such as Parents' Learning Allowance (PLA) and Adult Dependants' Grant (ADG).

6.5 Self-support

To be considered as supporting yourself financially you must have been meeting your own living costs for at least 3 years (this does not have to be 3 consecutive years) from any of the following sources:

- Income from employment;
- Benefits;
- State studentships;
- Scholarships, exhibitions and bursaries.

You would not be considered as supporting yourself financially if you are meeting living costs from money paid by a parent.

A photocopy of your P60s or benefit information.

7 Student financial questions

7.1 Unearned income



You may be asked to confirm any estimated income at a later date.

If your actual income is different from your estimated income we will reassess your entitlement to student finance. This may change the level of financial support you receive.

When working out your taxable unearned income, you should not include:

- earnings from full or part-time work such as holiday work or work you do during term-time;
- any Maintenance Loan or grant payments you may receive;
- payments you receive from your parents under a covenant;
- maintenance payments you expect to receive for your children. These maintenance payments should be included as part of your children's income in question 8c;
- Teacher Training Bursaries;
- Higher Education Bursary (for care leavers);
- bounties paid by the armed services to reservists or disablement or invalidity pensions; or
- ISAs.

7.2.1 Payments from an employer



You should only provide an amount here if you are being released from employment by your employer to attend your course. If this is the case, you should only include salary or wages that you will receive from that employer for days you are actually attending your course and have been released from your employment to do so. Any earnings from salary or wages entered here may affect your student finance entitlement.

Do not provide any amount here if you are a student who is working while studying but have not been specifically released by your employer to attend your course.

7.3 Dependent children



You must include any income the child received from working, interest earned on savings, investments and any maintenance payments you received for your children as part of their income in this question.

Don't include income from sources such as Child Benefit, Child Tax Credit, child element of Universal Credit, Government Child Trust or minimal sums of money from other sources when entering a child dependant's income.

If your child dependants' income will be at least 15% less than it was in tax year 2020-21 you can apply for a current year income assessment. This means we would use their expected income for tax year 2022-23 instead of their actual income for 2020-21 when working out your grant entitlement. If you want to be assessed using expected income for tax year 2022-23 use the additional notes pages at the back of the form to give us details.

7 Student financial questions - continued

Date of birth of any children



A photocopy of the child's/children's birth certificate(s).

Child's income



Send photocopies of evidence showing child's income from all sources after tax and National Insurance contributions in tax year 2020-21.

9 About your family

Dependent students



If you are a dependent student, the following family members count for the purpose of income assessment:

- your natural or adoptive parents, if both of them live with you.
- your parent and their partner, if they have one.

Your parent's partner is defined as:

- your stepmother or stepfather; or
- your parent's opposite or same sex partner if they live together as though they were married or in a civil partnership.

Independent students



If you are an independent student, only your partner, if you have one, counts for the purpose of income assessment.

Your partner is defined as:

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

Parent's current relationship status



A photocopy of:

- Decree absolute/Decree nisi, **or**
- Dissolution order, **or**
- A final or conditional order, **or**
- A letter from their solicitor confirming their status.

11 Financial details for tax year 2020-21 for parents and partners

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

What happens if my household income has changed since tax year 2020-21?



If your total household income (before tax) for tax year 2022-23 will be at least 15% less than it was in tax year 2020-21, still complete this section as well as completing a Current Year Income Assessment Form.

You can download this form at www.studentfinancewales.co.uk



Please note that a current year income assessment cannot be carried out unless you provide your financial details for the 2020-21 tax year.

Part B

Data sharing and you



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 applicable data protection legislation in the UK.

If you fail to provide your National Insurance (NI) number on the application form we will ask you to provide copies of your financial documents.

If your NI 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 C

Your financial information



Please give financial information for tax year 2020-21. Normally, this is the year ending 5 April 2021, but may differ if your employer or business has a tax year which does not end in April.

For any income paid in a foreign currency, please state the equivalent in pounds sterling.

Q1 Income from salary or wages



You should refer to your 2020-21 P60 or final payslip for your income from salary/wages. If as part of your salary or wages for tax year 2020-21 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.

Taxable state benefits



You should refer to your 2020-21 P60 or P45 from the Department of Work and Pensions for your taxable state benefit details. 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
- Jobseeker's Allowance
- Statutory Adoption Pay
- Statutory Maternity Pay
- Statutory Paternity Pay
- Statutory Sick Pay
- Widowed Parent's Allowance

Do not include income from any other benefits, including Universal Credit.

Occupational/private pension



If you received an occupational or private pension, you should refer to your P60P or annual statement from your pension provider.

Income from savings and investments



To make this question easier to answer, we have split it into 4 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 2020-21, not the actual amount of savings or invested sums you had.

11 Financial details – continued

Q3 Income from UK banks, building societies and unit trusts



Tell us about the amount of interest/income you received from the following savings and investment income type(s):

Gross UK interest (before tax has been deducted)

You must include interest you receive on bank, building society and other savings account, unless 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

Please refer to your bank or building society statements for these figures.

Income from UK life insurance gains, securities and partnerships



Tell us about the amount of interest/income you received from the following savings and investment income type(s):

- 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%

Do not include income from any other benefits, including Universal Credit.

Income from UK investments and dividends



Tell us about the amount of interest/income you received from the following savings and investment income type(s):

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

Income from foreign investment and dividends



Tell us about the amount of interest/income you received from the following savings and investment income type(s):

- Foreign dividends
- Interest and other income from overseas savings
- Dividends from foreign companies
- Dividend income received by a person overseas

11 Financial details – continued

Q4 Income from taxable benefits in kind



P11D

The following table provides a breakdown of what we want you to include as part of your total income from 'taxable benefits in kind' during tax year 2020-21. Add together all the benefits in kind you received and write your total figure on the form.

Benefit in kind
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 employees disposal
Other items (including subscriptions and professional fees)
Expenses payments made to, or on behalf of, the employee

Part D Other Income

Q1 Income from self-employment



To make this question easier to answer, we have split it into 2 parts. You may or may not have received self-employment income from both parts, just tell us about the ones you did.

Total adjusted profit from businesses



You should include the income type below as your answer for the total amount of adjusted profits you received from self-employment during tax year 2020-21

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

Total adjusted profit from partnerships



You should include the income type(s) below as your answer for the total adjusted profit you received from partnerships during tax year 2020-21

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

11 Financial details – continued

Q2 Minister of religion



Tell us about the amount of income you received from the following income type during the 2020-21 tax year:

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

Q3 Other income and lump sums



You should include the income type(s) below as your answer for the amount of income you received from other income and lump sums.

Add together the income types below that you received during tax year 2020-21 and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

- 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 compensation for loss of job

Q4 Income from property lettings



You should include the income type(s) below as your answer for the amount of income you received from property lettings.

Add together the income types below that you received during the 2020-21 tax year and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

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

Q5 Income from UK trusts



You should include the income type(s) below as your answer for the amount of income you received from UK trusts.

Add together the income types below that you received during tax year 2020-21 and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

- 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

11 Financial details – continued

Q6 Foreign income



You should include the income type(s) below as your answer for the amount of income you received from foreign income.

Add together the income types below that you received during tax year 2020-21 and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

- 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)

Q7 Income from overseas income and gains



You should include the income type(s) below as your answer for the amount of income you received from an overseas pension.

Add together the income types below that you received during tax year 2020-21 and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

- 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)

Q8 Income from overseas income and gains



You should include the income type below as your answer for the amount of income you received from other overseas income and gains.

Add together the income types below that you received during tax year 2020-21 and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

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

11 Financial details – continued

Part E

Q3 Allowable expenses on which you claimed tax relief



The list below is a breakdown of what we want you to include in your answer for the amount of allowable expenses you had on which you claimed tax relief.

Add together all allowable expenses below which you have had during tax year 2020-21 and tell us your total figure on the form. You may not have had all the allowable expenses listed, just tell us about the ones you did.

- 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

Power of Attorney



If you can't sign the form it must be signed on your behalf by your attorney. To grant a person Power of Attorney, you need to fill in a legal form giving their name, the specific period for which they can act on your behalf, and the specific tasks that they can perform. The Power of Attorney letter must be sent with the application before a signature from that attorney will be accepted.

Privacy Notice



The Student Loans Company (SLC) and the Welsh Government are joint Data Controllers under the Data Protection Legislation. We hold information for the purposes specified in our notification to the Information Commissioner including determining eligibility for student finance, assessing the maximum amount of financial support available, payment of student finance and the detection and prevention of fraud, and may use this information for any of these.

For further details about the way your information is used, who is responsible for it and the rights you have in connection with it, please refer to our full Privacy Notice available online at **www.studentfinancewales.co.uk/privacynotice**

If you don't have internet access, please call us on **0300 200 4050** and we can send a copy to you.

Data sharing for bursary and scholarship purposes



You may be eligible for a bursary or scholarship. In order for a university or college to determine and pay any bursary or scholarship to which you may be entitled, we may share some of your personal, financial and course details as well as information about your eligibility for student finance with them. For more information about this, read our Privacy Notice.

Next steps in your student finance journey

1

You complete and return your application form to us, along with any evidence, as soon as possible.

**You're
here**

2

We process your application. If any information is missing or incorrect we'll get in touch. Once we have all the information we need, we'll send you a Student Finance Entitlement letter.

3

You show your Student Finance Entitlement letter to your university or college (if they ask to see it).

4

We pay your Tuition Fee Loan directly to your university or college after they tell us that you're attending your course (if applicable).

We pay your Welsh Government Learning Grant and/or Maintenance Loan to you.