## cyllid myfyrwyr <mark>cymru</mark> student finance <mark>wales</mark>



Ariennir gan Lywodraeth Cymru Funded by Welsh Government

## 2023/24

## Application form for new part-time students

We welcome applications in Welsh. If you would prefer to apply in Welsh, a Welsh version of this form is available. Applying in Welsh will not delay your application. You can also apply online at **www.studentfinancewales.co.uk** 

#### About this form

PTMN

#### Who should complete this form?

Complete this form if you're living in Wales and:

- you're a part-time or Open University student applying for student finance for the first time
- your course start date is on or after 1 August 2018.

#### What sections should you complete?

All students need to complete sections 1 to 4 and read, sign and date the terms and conditions.

You'll also need to complete other sections of the form depending on what you want to apply for.

Students applying for Tuition Fee Loan only	Complete section <b>5 &amp; 10</b>
Students applying for Tuition Fee Loan and a Welsh Government Learning Grant and/or Maintenance Loan	Complete sections <b>5 to 11</b>

#### **Course Credits**

Before applying, you need to know how many course credits you intend to study. Each module you study is worth a number of credits. You should agree how many credits you'll study with your university.

To apply for a Tuition Fee Loan, Welsh Government Learning Grant and/or a Maintenance Loan, you need to have a course intensity of at least **25%** in the academic year.

#### Additional student finance

You may also be able to apply for additional financial support if:

- you have children or adults who depend on you financially
- you have a disability, long-term health condition, mental health condition or specific learning difficulty.

If you want to apply for additional student finance you need to tell us on page 2.

You can find out more about student finance at www.studentfinancewales.co.uk



facebook.com/sfwales



### Additional student finance

#### Disabled Students' Allowance (DSA)

If you want to apply for DSA you'll need to

- complete and return this form and
- complete a Disabled Students' Allowance Application Form (DSA1). You can download the DSA1 form at www.studentfinancewales.co.uk

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

Send me a DSA form

#### Parents' Learning Allowance (PLA) and Adult Dependants' Grant (ADG)

If you want to apply for PLA or ADG you'll need to:

- complete and return this form and
- complete a Grants for Dependants application form for part-time students (PTGFD). You can download the PTGFD form at www.studentfinancewales.co.uk

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

Send me a PTGFD form

### Childcare Grant (CCG)

If you want to apply for CCG you'll need to:

- complete and return this form and
- complete a Grants for Dependants application form for part-time students (PTGFD) and an Application for help with childcare costs for part-time students form (PTCCG1). You can download the PTGFD and PTCCG1 form at www.studentfinancewales.co.uk

Tick the box below if you want us to send you a PTGFD and PTCCG1 form instead.

Send me a PTGFD and PTCCG1 form

To find out how we'll use the information you provide go to www.studentfinancewales.co.uk/privacynotice to read our Privacy Notice before completing this form.

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 will share some of your personal, financial and course details as well as information about your eligibility for student finance with them.

- () Where you see this icon it means there's information in the application notes to help you.
- **(e)** Where you see this icon it means we need you to send documents as supporting evidence. You can find details in the accompanying notes.

If any information we ask for is missing or unclear we may not be able to process your application and you won't receive any funding.

#### Your personal details 1 Customer Reference Number (i) 1.1 (if you have one) 1.2 **Personal details** Title Complete these details exactly as stated on Mrs Mr Miss Ms your birth certificate or passport. First name(s) If your name has changed from your birth certificate or passport then send us supporting evidence confirming the change. Surname Any other names you may be known by

Sex

Day

Male

Date of birth

Nationality

Month

#### 1.3 National Insurance number (i)

We will share the National Insurance number you provide with the Department for Work and Pensions to confirm that it's valid, and with HM Revenue and Customs to allow us to collect your repayments.

-	

Female

\_

Year

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

## Your personal details – continued

## 1.4 Do you hold a valid UK passport?

You must prove your identity. The easiest way to do this is by giving information from your passport.

We will share the passport details you provide with HM Passport Office to confirm that they're valid.

#### UK passport expired?

If your UK passport has expired we can't accept this information as proof of your identity. You'll have to give other evidence as explained in the accompanying notes.

No – you'll have to send alternative evidence 🖲
Yes – complete the following details exactly as
stated in your passport
Date of issue
Day Month Year
Date of expiry
Day Month Year
Passport number
First name(s)
Surname

#### 1.5 Address details

All correspondence we issue will be sent to this address. You can update your address at any time by logging into your online account or by calling us.

#### Contact address

Postcode

Contact phone number

Mobile phone number

Email address

#### 1.5.1 Contact details

Give your current contact details.

## Your personal details – continued

1.6 What language would you like us to use on the letters we send you?

Welsh

#### 1.7 Relationship status

1

What is your current relationship status?

Single
Living with a partner If you're under 25 and have been married/ in a civil partnership before, you should also tick the box for the relevant marital status below.
Married/civil partnership
Give the date of marriage/civil partnership Day Month Year
Separated (e)
Divorced/dissolved civil partnership 🖲
Widowed/surviving civil partner (e)

## Previous support and qualification history

2.1	Will you be getting funding from any other source to meet the costs of your tuition fees in this academic year? Tell us about any contribution to your tuition fees that may be made by an employer, a bursary scheme, or from any other type of fund or sponsorship. Please note that we do not need to know if you are receiving a Care Leavers Higher Education Bursary.	No         Yes         What is the source of this funding?         How much funding will you receive?
2.2	Do you have a degree from an educational institution in the UK? (i)	No Yes - is this an honours degree? No Yes
2.3	Have you ever had any other loans from the Student Loans Company (SLC)?	No Yes – are you behind with the repayments? No Yes – you can't apply for student finance until you resolve this. Call 0300 100 0611 for Income Contingent Repayment (ICR) loans. If you have any Mortgage Style (MS) loans please call your debt owner on the telephone number shown on the most recent correspondence that you have received from them. If you do not know who your debt owner is call 0300 100 0632 for advice.
2.4	Have you received funding from SLC for any previous part-time courses you've studied?	No – go to section 3 Yes

2

## 2.4.1 Complete the table with details of any <u>part-time</u> Higher Education courses you've previously received funding for.

Course title and qualification (for example, BA (Hons) English)	Name and address of university or college (including town and country)	Start Date	End Date	Qualification gained?
				No Yes
				No Yes
				No Yes

2

## 3 Residence

3.1	Where do you normally live when you're not studying? (j)	Address	
		Postcode	
		Now go to 3.2	
3.2	Are you a UK national? 🛈 🖲	No – go to 3.3 Yes – go to 3.20	
3.3	Are you an Irish citizen? 🛈 🖲	<ul> <li>No – go to 3.4</li> <li>Yes – have you been resident in the UK and Islands for the three years prior to the first day of the first academic year of your course?</li> <li>No – go to 3.4</li> <li>Yes – go to 3.21</li> </ul>	
3.4	<ul> <li>Are you the family member of a UK national, and both you and your UK national family member were living:</li> <li>in the UK on 31 December 2020, after moving to the UK from the EEA or Switzerland on or after 1 January 2018; or</li> </ul>	No – go to 3.5 Yes – have both you and your family member been resident in the UK, Gibraltar, the EEA or Switzerland for three years prior to the first day of the first academic year of your course?	

in the EEA or Switzerland on 31
 December 2020? (i) (e)

Yes – go to 3.21

No – go to 3.5

## 3 Residence

3.5 Have you been granted settled status or pre-settled status under the EU Settlement Scheme? (j) (e)

No − g	go to <b>3.6</b>
🗌 Yes –	settled status
	Please provide your share code
	Now go to <b>3.21</b>
Yes –	pre-settled status
	Are you an EU national and have you
	been resident in the UK and Islands for
	three years prior to the first day of the
	first academic year of your course?
	<b>No</b> – go to <b>3.6</b>
	Yes – provide your:
	Expiry date of pre-settled status Day Month Year
	Share code
	Now go to <b>3.21</b>

## 3.6 Are you the child of a Swiss national? (i) (e)

If you have lived in the UK, the EEA, Switzerland or the Overseas Territories for the three years prior to the first day of the first academic year of your course, where at least part of that period has been spent in an Overseas Territory other than Gibraltar, you can only apply for tuition fee funding. You should complete this question then the remainder of the form.

Please note you don't need to provide identification evidence if you provide your share code.

Yes –	have you been resident in the UK, Gibraltar, the EEA or Switzerland for
	the three years prior to the first day of the first academic year of your course?
	Yes – provide your/your parent or step-parent's information below.
	No – have you been resident in the UK, the EEA, Switzerland, or the Overseas Territories, where at least part of that period has been spent in an Overseas Territory other than Gibraltar, for three years prior to the first day of the first academic year of your course?
	<b>No</b> – go to <b>3.7</b>
	Yes – you will only be eligible for tuition fee funding. Provide your share code information below.
	Expiry date of pre-settled status
	Day Month Year
	Share code If you are an Irish citizen you do not need to provide a share code
	If your <b>parent or step-parent</b> has settled or pre-settled status under the EU Settlement Scheme, provide their:
	Date of birth
	Day Month Year
	Expiry date of pre-settled status Day Month Year
	Share code
	Now go to <b>3.21</b>

No - go to 3.7

#### 3.7 Are you or your: No - go to 3.8 · husband, wife, civil partner; or Yes – I have been working or looking for work parent(s), step-parent; or in the UK. • child, step-child other direct ascending or Yes – my family member has been working descending line family member or looking for work in the UK. My family member is my: an EEA or Swiss national who is working, or has worked or is looking husband/wife/civil partner for work in the UK? (i) (e) parent(s)/step-parent If you have lived in the UK, the EEA, Switzerland or the Overseas Territories for the three years prior to the first child/step-child - only applicable to day of the first academic year of your course, where at EEA worker family members. least part of that period has been spent in an Overseas Territory other than Gibraltar, you can only apply for tuition fee funding. You should complete this question other direct ascending or descending then the remainder of the form. line family member - only applicable to EEA worker family members. Have you been resident in the UK, Yes – provide details of you/your family Gibraltar, the EEA or Switzerland for the member's employment. You should also three years prior to the first day of the first provide details of your previous study. academic year of your course? () (e) No - have you been resident in the UK, the EEA, Switzerland, or the Overseas Territories for three years prior to the first day of the first academic year of your course? No - go to 3.8 **Yes** – you will only be eligible for tuition fee funding. Provide details of you/your family member's employment. You should also provide details of your previous study.

If you/your family member are currently working, will you/your family member continue to work during your studies? **No** – go to **3.8** 

Yes – provide details:

#### 3.7 continued

#### You don't need to provide a share code if:

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

	Expiry date of pre-settled status Day Month Year
	Share code
	Provide your family members (if applicable):
	Date of birth
	Day Month Year
	Expiry date of pre-settled
	Day Month Year
	Share code
	Now go to <b>3.21</b>
	<b>No</b> – go to <b>3.9</b>
	Yes – has your Turkish worker parent/step-
he	parent been granted extended leave
rst	to remain in the UK after 31 December
at as	2020 by the Home Office?
۱	<b>No</b> – go to <b>3.9</b>
	Yes – were you and your Turkish
	worker parent/step-parent
	living in the UK by 31
	December 2020?

No – go to 3.9

Yes - go to 3.21

Provide your:

## 3.8 Are you the child of a Turkish worker who is working in the UK?

If you have lived in the UK, the EEA, Switzerland or the Overseas Territories for the three years prior to the first day of the first academic year of your course, where at least part of that period has been spent in an Overseas Territory other than Gibraltar, you can only apply for tuition fee funding. You should complete this question then the remainder of the form.

SFW/PTMNF/2324

3.9 Have you or your family member been granted leave under the Afghan Relocation and Assistance Policy (ARAP) or the Afghan Citizens Resettlement Scheme (ACRS)? () ()

y member ler the	<b>No</b> – go to <b>3.10</b>
Assistance ighan	Yes – please confirm
Scheme	I have been granted leave under the ARAP or ACRS.
	I have been granted leave in line with my family member. My family member is my:
	husband/wife/civil partner
	parent/step-parent
	Provide your or the leave holder's:
	Home Office reference number
	Date latest status granted Day Month Year Date this status is due to expire (if applicable) Day Month Year
	Have you lived outside the UK and Islands since your latest status was granted?
etus in the ed under the ? (i) (e) finite Leave to Re-	No – go to 3.11 Yes – provide your:
domestic violence o question 3.18	Home Office reference number

- 3.10 Do you have settled status in the UK, that was not granted under the EU Settlement Scheme? (i) (e)
  - If you have been granted "Indefinite Leave to Remain" in the UK as a victim of domestic violence or abuse tick no here and go to question 3.18
  - If you have been granted "Indefinite Leave to Remain" in the UK as a bereaved partner tick no here and go to question 3.19

Date latest status granted
Day Month Year
Now go to <b>3.20</b>

- 3.11 Have you been granted limited leave No – go to 3.12 to enter or remain under a Ukraine Scheme? () 😑 Yes - provide your: By Ukraine Scheme we mean: Share code (if you have one) • the Ukraine Family Scheme; • the Homes for Ukraine If you don't have a share code Sponsorship Scheme; or provide your: • the Ukraine Extension Scheme Home Office reference number Date latest status granted Day Month Year Date this status is due to expire Month Year Day Have you lived outside the UK and Islands since your latest status was granted? No - go to section 4 Yes - go to 3.22 3.12 Have you or your:
  - husband, wife, civil partner; or
  - parent(s), step-parent

been granted refugee status by the UK government? (i) (e)

<b>No</b> – go to <b>3.13</b>	
Yes – provide your:	
Home Office reference number	
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 4	
<b>Yes</b> – go to <b>3.22</b>	

- 3.13 Have you or your:
  - husband, wife, civil partner; or
  - parent(s), step-parent

been granted 'leave to remain' as a Stateless Person? (i) (e)

	<b>No</b> – go to <b>3.14</b>
	Yes – provide your:
	Home Office reference number
	Date latest status granted Day Month Year Date this status is due to expire Day Month Year Day Month Year Have you lived outside the UK and Islands since your latest status
	was granted?
	No – go to section 4
	Yes – go to 3.22
	<b>No</b> – go to <b>3.15</b>
	No – go to 3.15 Yes – provide your: Home Office reference number
	Yes – provide your:
	Yes – provide your:
	Yes – provide your: Home Office reference number Date latest status granted Day Month Year
	Yes – provide your: Home Office reference number Date latest status granted
	Yes – provide your: Home Office reference number Date latest status granted Day Month Year Date this status is due to expire
	Yes – provide your: Home Office reference number Date latest status granted Day Month Year Date this status is due to expire Day Month Year
	Yes – provide your: Home Office reference number Date latest status granted Day Month Year Date this status is due to expire Day Month Year
1	Yes – provide your: Home Office reference number Date latest status granted Day Month Year Date this status is due to expire Day Month Year
1	Yes – provide your: Home Office reference number Date latest status granted Day Month Year Date this status is due to expire Day Month Year

- 3.14 Have you or your:
  - husband, wife, civil partner; or
  - parent(s), step-parent

been given:

- '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? (i) (e)

- 3.15 Have you or your:
  - husband, wife, civil partner; or
  - parent(s), step-parent

been granted Humanitarian Protection? (j) (e)

<b>No</b> – go to <b>3.</b>	16
Yes – provide Home	e <b>your</b> : Office reference number
Date la	itest status granted
Date in Day	Month Year
Date th <sub>Day</sub>	his status is due to expire Month Year
•	rou lived outside the UK and
Islands was gra	s since your latest status anted?
	– go to <b>section 4</b> s – go to <b>3.22</b>
	<b>5</b> - 90 10 <b>3.22</b>
<b>No</b> – go to <b>3</b> .	17
Vee nueviele	

3.16 Have you been granted leave to remain in the UK under section 67 of the Immigration Act 2016, or have you been granted leave in line as the dependent child of someone who has? (i) (e)

′es –	provide <b>your</b> : Home Office reference number
	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 4
	<b>Yes</b> – go to <b>3.22</b>

3.17 Have you been granted 'Calais leave' in the UK, or have you been granted leave in line as the dependent child of someone who has? (j) (e)

- 3.18 Have you been granted 'leave to remain' in the UK as a victim of domestic violence or abuse. or are you the dependent child of someone who has? (i) (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 4 Yes - go to 3.22 Have you been granted 'leave to No - see below remain' as a person who has been a bereaved partner, or are you the Yes - provide your: dependent child of someone who Home Office reference number Date latest status granted Day Month Year Date this status is due to expire Month Day Year Have you lived outside the UK and Islands since your latest status was granted? No – go to section 4

Yes - go to 3.22

No - go to 3.18

Day

Day

No - go to 3.19

Yes - provide your:

Yes – provide your:

Home Office reference number

Date this status is due to expire

Year

Year

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

No - go to section 4

Home Office reference number

Yes - go to 3.22

Date latest status granted

Month

Month

was granted?

If you have answered 'No' to all questions check the notes for more information on what to do next.

3.19

has? (j) (e)

3.20 In the three years prior to the start of the first academic year of your course, did you live outside the UK and Islands at any time?

No		
Yes		
Now go to 3.21		

3.21 Give details of your residence for the three years before the start of the first academic year of your course. For example: if your course starts in September 2023, we need to know where you lived between 01/09/2020 and 01/09/2023. If your course starts in March 2024, we need to know where you lived between 01/01/2021 and 01/01/2024. There should be no gaps in the dates you give us.

Full address (including postcode) Full address (including postcode) From From Month Month Day Year Day Year То То Day Month Day Month Year Year Why were you there? Why were you there? Full address (including postcode) Full address (including postcode) From From Month Month Day Year Day Year То То Day Month Year Day Month Year Why were you there? Why were you there?

Now go to 3.23

3.22 Give details of your residency from the date you received your last status from the Home Office to the first day of the first academic year of your course. There should be no gaps in the dates you give us. (i)

Full address (including postcode)	Full address (including postcode)
From	From
Day Month Year	Day Month Year
То	То
Day Month Year	Day Month Year
Why were you there?	Why were you there?
Full address (including postcode)	Full address (including postcode)
From	From
Day Month Year	Day Month Year
То	 To
Day Month Year	Day Month Year
Why were you there?	Why were you there?

Now go to 3.23

3.23 Did you move to Wales wholly or mainly for the purposes of receiving education?

Νο
Yes – you need to call us on 0300 200 4050

#### 3.24 At any time since 1 September 2020 has:

• either of your parents, step-parents, guardians; or

• your husband, wife, civil partner lived or worked outside the UK and Islands or, in the case of an EU, EEA or Swiss national, outside the UK, Gibraltar, the EEA or Switzerland?

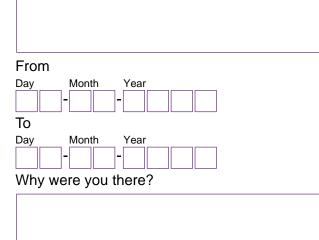
Full address (including postcode)		
From		
Day Month Year		
То		
Day Month Year		
Why were you there?		

No - now go to section 4 Yes - give details below

Full address (including postcode)

From
Day Month Year
То
Day Month Year
Why were you there?
Full address (including postcode)
From
Day Month Year

Full address (including postcode)



То

Day Month

Why were you th

Year	
Year 	

### About your university or college and course

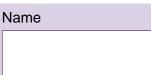
. .

#### 4.1 University or college details

If your course is at a university that is made up of a number of colleges, give the name of the college first, followed by the name of the university.

Name		
Full address		

4.1.1 If the course is franchised to another university or college, give the name and address of the other university or college



Full address

- 4.1.2 Give the full name of your course You should check the name of your course with your university or college. If the course details you give us can't be confirmed yet, your student funding may be delayed. Don't enter your module name here.
- 4.2 Qualification you expect to gain For example, BA (Hons) English
- 4.3 In this academic year, when will you start your studies?
- 4.4 When will you finish the final year of your course?

Month	Year
Month	Year

### About your university or college and course

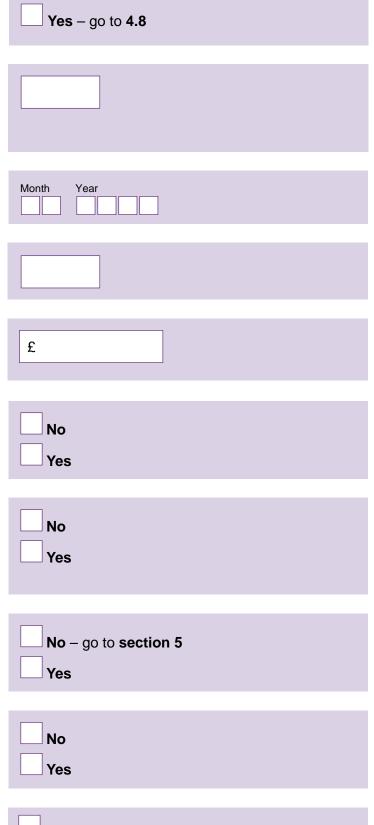
## 4.5 Are you entering your first year of your current course?



## 4.6 What year of your studies are you going into?

Make sure you tell us what year of your studies you're going into **not** the year of your course.

- 4.7 What date did you start your studies?
- 4.8 How many credits do you plan to study this academic year? (i)
- 4.9 Full tuition fee amount your university or college is charging you this academic year (1)
- 4.10 Is your course a part-time postgraduate Initial Teacher Education (ITE) course? (j)
- 4.11 Have you been accepted on the Erasmus+ exchange program, Turing Scheme or the International Learning and Exchange Programme (ILE) (also known as Taith)? (
- 4.12 Are you studying a part-time distance learning course?
- 4.13 Do you have a disability which prevents you from attending your university or college in person? (i)
- 4.14 Are you studying a distance learning course because you or a family member (who you live with) is currently serving in the Armed Forces outside Wales?



Νο
Yes – send evidence

## Before you continue...

#### What you need to know

Your course intensity must be at least 25% in academic year 2023/24 to be eligible to apply for a Tuition Fee Loan, Welsh Government Learning Grant and/or Maintenance Loan.

#### What you need to do

The information below tells you which sections of the form you need to complete.

If you want to apply for a Tuition Fee Loan only

Complete section 5 & 10.

If you want to apply for a Tuition Fee Loan and a Welsh Goverment Learning Grant and/or Maintenance Loan

Complete section 5 to 11.

## Your loan request

#### 5.1 Tell us the amount of Tuition Fee Loan you want to borrow (j)

Any Tuition Fee Loan you borrow will be paid directly to your university or college.

5.2 Tell us the amount of Maintenance Loan you want to borrow ①

> 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.

If you want the maximum available to you tick the box

If you want less than the maximum available to you tell us how much you want to borrow



£

(enter amount)

If you want the maximum available to you tick the box

If you want less than the maximum available to you tell us how much you want to borrow

(enter amount)

#### 5.3 Contact details

You must give the name and address of at least one contact. If you provide details of two contacts, the people you name should live at different addresses and will only be contacted if, for example, you move address and don't inform us. You must inform these people that you've named them as contacts.

£

Contact 1 First name(s)	Contact 2 First name(s)
Surname	Surname
Relationship to you	Relationship to you
Address	Address
Postcode	Postcode
Home phone number	Home phone number

## Dependent and independent students

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

6.1 Will you be aged 25 or over on the first day of the academic year?

6

- **6.2** Have you been married or in a civil partnership at any time before the first day of the academic year? (e)
- 6.3 Will you have care of a person under the age of 18 on the first day of the academic year?
- **6.4** Please tick the relevant box if any of the following apply to you

Yes No			
Yes No			
Yes No			
If you have ticked 'Yes' in any of the boxes in question 6.1, 6.2 or 6.3, <b>go to section 7</b>			
Your parents cannot be found or it is not reasonably practicable to get in touch with them.			
You are irreconcilably estranged (have no contact with) from your parents and this will not change.			
At any point from the age of 14 to the first day of the first academic year of the course, you have not been under the legal care of your parents for 13 weeks or more, you have been under a special guardianship order or you have been in the custody or legal care of, or have been given accommodation by a Local Authority for 13 weeks or more.			
Both your parents are deceased.			
You have applied for student finance before, and the parent who provided their income details is deceased.			
Your parents are living outside the UK, Gibraltar or EU and the assessment of their financial circumstances would place them in jeopardy.			
Your parents are living outside the UK, Gibraltar or EU and it would not be reasonably practicable or possible for them to send you money.			
If you have ticked any of the boxes above, you will be contacted for evidence and, subject to this, you may be considered independent.			
If you have ticked any of the boxes above, go to section 7			

6.5 Have you supported yourself financially for a total of three years or more before the start of the first academic year of your course?

Yes No

If 'No' you are a dependent student **go to section 7** 

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

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

## Student financial details

The academic year is determined by when you begin your study. Please see page 16 of the guidance notes for academic year dates.

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

#### **Unearned income**

- 7.1 Taxable **unearned** income is any income you receive from the following sources:
  - Bank or building society gross interest
  - Property, lettings or rent
  - Dividends or investments
  - Trusts or sponsorships
  - Any other payment received for attending the course

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

What is the source of this income?

#### Payments from an employer

7.2.1 Will your employer be releasing you to attend your course this academic year?

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

**7.2.2** During this academic year, will you or your employer pay any money into a pension fund on your behalf?

If 'Yes', how much during this period?

#### Dependent children

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

Your child's income includes their income from all sources after Income Tax and National Insurance contributions for tax year 2021-22.

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

£	

Yes No	If 'No' <b>go to 7.3</b>
£	
Yes No £	If 'No' <b>go to 7.3</b>

8 Your UK bank or building society account details

8.1 Account details

Sort code		
Account number		
Building society roll number (if applicable)		

We'll only use the bank details you provide to pay your Welsh Government Learning Grant and/or Maintenance Loan. Tuition fees will be paid directly to your university or college.

N			
9 About your family			
Tick one of the following options:			
I am a <b>dependent student</b> – go to question	n <b>9.1</b> . (j)		
I am an <b>independent student with a partner</b> , please read and sign the <b>terms and</b> <b>conditions</b> (i) on <b>pages 30 and 31</b> and then pass this form to your partner to complete <b>section 11</b> .			
I am a single independent student, go to the terms and conditions on pages 30 and 31.			
9.1 Which parent do you normally live with, or have more contact with?			
Mother Father	or Both parents N/A		
<ul> <li>9.2 What is the current relationship status of this parent?</li> <li>Single</li> <li>Living with a partner</li> </ul>	What you need to do next Read and sign the terms and conditions on pages 30 and 31 and then pass this form to your parent(s).		
Married/civil partnership Separated (e) Divorced/dissolved civil partnership (e) Widowed/surviving civil partner	What your parent(s) need to do next The parent(s) you normally live with should complete section 11. If the parent indicated in 'a' is married, in a civil partnership or living with a partner, their partner must also complete section 11.		

These terms and conditions ("terms") and applicable legislation apply to all of the student finance available to students for the academic year 2023/24.

I understand that I must read the specific terms about the student finance products available because they will affect me if I apply for them at any time in this academic year.

#### Loan Contract

- 1. I confirm I have read and understood these terms and A Guide to Terms and Conditions available at www.studentfinancewales.co.uk/terms-andconditions
- I confirm that to the best of my knowledge and belief, the information I have provided is true and complete. If it is not, I understand that I may not receive student finance, any support I have had may be withdrawn and I could be prosecuted.
- 3. I understand that student finance is provided to me by the Welsh Ministers (the "Lender") which includes any persons acting on their behalf and any replacement(s) under section 23(4) of the Teaching and Higher Education Act 1998 as amended or replaced from time to time (the "Act").
- 4. I understand these terms, the Act and the regulations made under section 22 of the Act will apply to any student finance provided to me by the Lender.
- 5. I understand that "student finance" in these terms means financial support by way of grant(s) and/or loan(s) made by the Lender under the regulations.
- 6. I understand that the Student Loans Company Limited ("SLC") carries out certain functions on behalf of the Lender.

#### **My Obligations**

- 7. I understand that if I have:
  - (i) reached the age of 18 years; and
  - (ii) have entered into agreement(s) for a loan under section 22 of the Act before I reached the age of 18 years,

I am agreeing to "ratify" any and all such student loans by signing these terms. This means that I confirm I entered into agreement(s) with the Lender and agree to the terms of any such previous agreement(s). If I have reached the age of 18 and refuse to "ratify" any previous agreement(s), I understand that I will not be eligible to get any further student finance under the regulations.

- 8. I agree to give SLC any information they need in support of this application for student finance and/or to seek repayment.
- 9. I agree to tell SLC immediately if my circumstances change in any way that might affect my entitlement to student finance. I understand that if I do not do this I may not get any further payments and I may have to repay the student finance I have already received. I agree that from the date I submit my student finance application until my loan(s), together with all and any interest, penalties and charges which apply, is fully repaid I must tell SLC about any changes in my personal details (including my National Insurance

number) and contact details I have provided.

- 10. I agree that if I get an overpayment of student finance, I need to repay this in full and that any overpayment may be taken from any future entitlement to student finance.
- 11. I agree that I will repay the Lender any loan(s), together with all and any interest, penalties and charges which apply. I understand that this repayment will be due by me to the Lender as a debt. If I breach any of the terms of my loan, I agree to pay any charges and penalties which apply under the Act and the regulations. I understand that I will repay my loan(s) through the United Kingdom ("UK") tax system and/or I may repay SLC directly. If I live abroad, I will repay my loan(s) to SLC directly.
- 12. I agree that any loan(s) made to me in accordance with the regulations once my application is accepted by the Lender is a/are contract(s) between me and the Lender. I understand that I am liable for my loan(s) and will be charged interest from the first payment of the loan advance by the Lender.
- 13. I agree to tell SLC if I leave the UK to live outside the UK or if for any other reason I am outside the UK tax system for more than three months.

#### Legal Action and Applicable Law

14. In the event of any legal action, I agree that the laws of England and Wales will apply and that the courts of that part of the UK will hear any legal action. If my address is outside the UK the laws of the part of the UK where my education provider is situated will apply and the courts of that part of the UK will hear any legal action. I agree that the Lender has the right to take legal action against me in any other court with jurisdiction.

#### **Sharing Information**

- 15. If I am in breach of these terms and/or the regulations I agree that the Lender may share information held about me and my account with third parties, including the government or a government agency of another country, who may help to locate me and/or help take action to recover any payments I owe.
- I confirm where I have provided any personal information about any other person in my student finance application, I have done so with their consent.
- I understand that SLC will process my personal data in line with the Privacy Notice available at www.studentfinancewales.co.uk/privacy-notice which may be updated from time to time.

#### **Disabled Students' Allowance ("DSA")**

This section applies if I apply for DSA this academic year.

- I understand that any equipment I receive through DSA must be used for my course of study and that I am responsible for paying any repair costs.
- 19. I understand that if I consent to SLC sourcing my equipment and support, SLC can pay the suppliers of any approved equipment and support directly.

- 20. I understand that with my consent, SLC can make payment to the needs assessment centre on my behalf.
- 21. I understand that with my consent, SLC can make a direct payment on my behalf to third parties providing any other approved service or support to me.
- 22. If I do not agree to SLC paying the suppliers of equipment, support or other services on my behalf, I understand that I will be responsible for meeting the costs of any approved equipment, support or other services out of my DSA allowance. SLC reserves the right to request evidence of receipt of equipment, support or other services in relation to my DSA.

#### Childcare Grant ("CCG")

This section applies if I apply for CCG this academic year.

- 23. I understand that if I do not provide the evidence of childcare costs within the timescales set, I may lose my entitlement. If my childcare costs are different from the estimates I have provided, further payments of my CCG may increase or decrease accordingly. If no further CCG payments are due to be paid to me, I may be liable to repay any difference.
- 24. I understand that if I do not take up my childcare, or if I change to a childcare provider who is not registered or approved, I will have to pay back any overpayment.
- 25. I confirm that neither I nor my husband, wife, civil

partner or cohabiting partner have chosen to receive support for childcare from:

- (i) the childcare element of Working Tax Credit;
- (ii) the childcare element of Universal Credit;
- (iii) Tax-Free Childcare; and/or

(iv) the NHS Bursary Childcare Allowance; and I agree to tell SLC immediately if I or my husband, wife, civil partner or cohabiting partner does receive this support. I understand that SLC may share my personal data with HMRC to check whether I get childcare support.

Your full name (in BLOCK CAPITALS)	Your signature
	x
Today's date Day Month Year	

#### How to complete this section

If you are a single parent of the student

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

If there are two parents in the student's household

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

If you are the partner of an independent student

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

#### Use the supporting notes to prevent any delays to the application



Where you see this icon it means there's additional information in the Supporting Notes which will help you complete your supporting application.

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

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

#### What details do I need to provide?

You need to provide:

- your personal details, such as your name and address;
- your National Insurance (NI) number (if you have one);
- details of any income from the UK or overseas for tax year 2021-22 that HM Revenue and Customs (HMRC) doesn't know about;
- details of any pension payments you made for the tax year 2021-22; and
- details of any other dependants.

#### Why do I need to tell you my income from the 2021-22 tax year?

We use figures from this tax year because it is the most up-to-date information that HMRC holds for you.

You must tell us your 2021-22 income details as we cannot accept amounts from any other tax year. This ensures the student(s) you're supporting receives everything they're entitled to.

## What happens if my household income has dropped since tax year 2021-22?

If your household income is expected to or has dropped by at least 15% since tax year 2021-22, you can apply for a current year income assessment. This means we'd assess the student for funding based on your estimated income for tax year 2023-24.

You must still complete this form but can provide a more up to date income figure later to ensure the student gets paid the right amount. Read page 27 of the supporting notes for information on how to apply for a current year income assessment.

#### **Additional information**

To find out how we'll use the information you provide go to www.studentfinancewales.co.uk/privacynotice to read our Privacy Notice before completing this form.

If you have further questions you can:

- check out the supporting notes
- visit www.studentfinancewales.co.uk

Part A – Your personal details			
Person 1	Person 2		
Your Customer Reference Number (If you have one)	Your Customer Reference Number (If you have one)		
Relationship to the student	Relationship to the student		
Title	Title		
Forename(s)	Forename(s)		
Surname	Surname		
Any previous names you may be known by	Any previous names you may be known by		
Sex	Sex		
Male Female	Male Female		
What is your current marital status?	What is your current marital status?		
Married/civil partnership	Married/civil partnership		
Divorced/dissolved civil partnership (	Divorced/dissolved civil partnership (		
Living with a partner	Living with a partner		
Separated 🛈	Separated ①		
☐ Widowed/surviving civil partner ①	Widowed/surviving civil partner		
Single	Single		
Preferred correspondence language	Preferred correspondence language		
Welsh English	Welsh English		

Date of birth	Date of birth	
Place of birth (name of town or village exactly as it appears on your birth certificate or passport)	Place of birth (name of town or village exactly as it appears on your birth certificate or passport)	
Contact address	Contact address	
Postcode	Postcode	
Contact telephone number	Contact telephone number	
Email address	Email address	

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

If you would like to provide it separately, you can download an Assessment of Financial Circumstances form (PFF2) 2023/24 from: **www.studentfinancewales.co.uk** and return it to us.

Alternatively, you can have the form sent to you by ticking this box:

Person 1

Send me a separate form

Person 2
Send me a separate form

#### Part B – Data sharing and you

**If you have a National Insurance (NI) number** you must provide it below. We will use your NI number to check your income for the 2021-22 tax year with HM Revenue & Customs. This allows us to gain the most accurate financial information.

**If you do not have an NI number** then we will need full evidence of your financial details for the 2021-22 tax year.

		Person 1	Person 2
Q1	Do you have an NI number? Provide your NI number:	Yes No - go to Q6 go to Q2	Yes No - go to Q6 go to Q2
Q2	Did you complete a self assessment tax return in the UK for the tax year 2021-22?	<b>Yes</b> - go to Q3 <b>No</b> - go to Q5	<b>Yes</b> - go to Q3 <b>No</b> - go to Q5
Q3	Did you receive any UK income that was under a tax threshold?	<b>Yes</b> - go to Part C <b>No</b> - go to Q4	Yes - go to Part C No - go to Q4
Q4	Did did you receive any income in tax year 2021-22 from overseas that <b>wasn't</b> declared to HMRC?	<b>Yes</b> - go to Part D <b>No</b> - go to Part E	<b>Yes</b> - go to Part D <b>No</b> - go to Part E
Q5	HMRC will tell us any income you received in the UK from employment, benefits and/or pensions. Did you receive any other income?	Yes - go to Part C No - go to Part E	Yes - go to Part C No - go to Part E
Q6	Did you have any income during the <b>2021-22</b> tax year?	Yes - go to Part C No - go to Part E	Yes - go to Part C No - go to Part E

#### Part C – Other income in the UK

#### Instructions

- Please give your financial details for the tax year from 6 April 2021 to 5 April 2022.
- Answer 'Yes' or 'No' to question Q1, if you answer 'Yes' please provide the income amount.
- If you answer 'No' to question Q1, this means you are telling us that you **did not** receive any income from that particular income type in tax year 2021-22.

Although you may not have declared income to HMRC as it was below the taxable threshold, this needs to be declared and will be used when calculating the student's entitlement.

#### **Financial details**

- Q1 Did you receive any income in the UK that HMRC doesn't know about?
  - a Total income from savings and investments Only tell us about the amount of interest/income you gained from savings and investments during the 2021-22 tax year, not the actual amount of savings or invested sums you had.
  - **b** Total income from property lettings, land or rent This includes the Rent a Room Scheme.
  - **c** Total income from casual/freelance earning(s)

This includes any supplementary sources of income.

**Q2** Did you receive any income from overseas that you haven't already told HMRC about?

Person 1	Person 2	
£ Yes No - go to Q2	Yes     No -       go to Q2       £	
£	£	
£	£	
Yes - go to Part D	Yes - go to Part D	
<b>No</b> - go to Part E	No - go to Part E	

#### **Part D – Overseas income for tax year 2021-22**

#### Instructions

- Please give your financial details for the tax year from 6 April 2021 to 5 April 2022.
- Please enter your income in the currency you were paid in, you don't need to convert it.

You will need to send us evidence of any income declared in this section as HMRC are unaware of it.

Fin	ancial details	Person 1	Person 2
Q1	Did you receive any income from overseas from the following sources:	<b>No</b> - go to Part E	<b>No</b> - go to Part E
		Yes	Yes
	a Income from employment or self-employment	_	
	If you have already informed HMRC of this income, you should not state it here.		
	<b>b</b> Income from taxable state benefits		
	c Income from occupational, private pension(s)		
	If you received a lump sum pension, only declare the amount that you paid tax on.		
	d Any other income		
	<ul> <li>Examples of this includes income from:</li> <li>savings and investments;</li> <li>property lettings, land or rent; or</li> <li>casual freelance earnings.</li> <li>This is not an exhaustive list, you may have other income.</li> </ul>		
	e Total overseas income that HMRC doesn't know about?		
	Please total the amounts declared in questions a to d to provide an overall amount.		
Q2	If your income in Q1 was not paid in pounds sterling, what currency was this paid in?		

#### Part E – Income deductions

#### Instructions

- Please give your financial details for the tax year from 6 April 2021 to 5 April 2022.
- Answer 'Yes' or 'No' to questions Q1 and Q2, if you answer 'Yes' please provide the income amount.

Any deductions declared in section 5 will reduce your household income figure when calculating the student(s) entitlement (as long as evidence is provided).

		Person 1	Person 2
Q1	Did you pay any private pension contributions? (	Yes No - go to Q2	Yes No - go to Q2
	Total amount you paid	2	£
Q2	Did you pay any Additional Voluntary Contributions (AVCs)?	Yes No - go to Part F	Yes No - go to Part F
	Total amount you paid	2	٤

#### Part F – Your dependants – not in further or higher education

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

#### Q1 Child dependants not in further or higher education in academic year 2023/24 n

Do not include any dependants in further or higher education in Q1. Their details should be put into Q2.

Include unearned income for all dependants.

If you have more than 2 children and need more space use the additional notes section on page 43.

Full name
Date of birth (DDMMYYYY)
Income for the year

#### Q2 Child dependants in further or higher education in academic year 2023/24

Do not include the student when completing this question.

If the student is your partner, please include any children they named in their application for student finance if the children have applied for student finance.

If you have more than 2 children and need more space use the additional notes section on page 43.

Full name	Full name
Date of birth (DDMMYYYY)	Date of birth (DDMMYYYY)
School, college or university	School, college or university
Course	Course
Are they receiving financial support? If so, from	Are they receiving financial support? If so, from
which authority or organisation?	which authority or organisation?
	Do you want to support this student's
Do you want to support this student's application for student finance?	Do you want to support this student's application for student finance?

### Declaration for parents and partners ①

#### Before signing, you should read the Privacy Notice in the notes that accompany this form. (j)

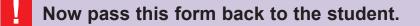
#### This application for financial support may be delayed unless you sign and date this declaration.

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

Person 1	Person 2	
Your full name (in BLOCK CAPITALS)	Your full name (in BLOCK CAPITALS)	
Your signature	Your signature	
X	X	
Today's date Day Month Year	Today's date       Day     Month       Year       -	

#### **Returning the form**

To make sure the student receives their first payment at the start of term, this form should be returned with all of the evidence we need as soon as possible. If the application form is returned more than 9 months after the start of the academic year it won't be processed, and the student may lose their full entitlement to student finance for this academic year.



The following questions are voluntary – you do not have to answer them. Whether or not you answer will not affect our assessment of your entitlement to financial support.

The information will be used to help the Welsh Ministers develop their policies in the future.

Q1	Do any of your parents have any higher education qualifications, for example, degrees and diplomas or certificates of higher education? This includes your natural parents, your adoptive parents, your step-parents, partners of your parents, and your guardians.	No Yes Don't know
Q2	How would you describe your ethnic origin? White	British
		Any other white background
	Black or Black British	African Caribbean Any other black background
	Mixed	<ul> <li>White and black Caribbean</li> <li>White and black African</li> <li>White and Asian</li> <li>Any other mixed background</li> </ul>
	Chinese or other ethnic group	Chinese Any other
	Asian or Asian British	<ul> <li>Indian</li> <li>Pakistani</li> <li>Bangladeshi</li> <li>Any other Asian background</li> </ul>

Before you send your form make sure you've:

## Completed your passport details on page 4

If you don't have a valid passport, you need to send us alternative evidence. If we can't confirm your identity we can't give you a loan and/or grant.

## Included all documents we've asked for to support your application

If we don't receive all the information we need your application will be delayed.

## Read, signed and dated the terms and conditions on page 31

If you don't sign the terms and conditions we can't give you a loan and/or grant.

Return your completed form to:

## Student Finance Wales PO Box 211 Llandudno Junction LL30 9FU

Make sure that your completed application and all evidence are weighed and the postage costs are fully paid.

## Remember to ask for proof of postage!











# Give permission for someone to contact us on your behalf

If you'd like to give permission for a nominated person to talk to us about your account, you can use this form to set up Consent to Share (CTS) for them.

A nominated person could be:

- an individual person such as your parent, foster parent, sibling or partner; or
- a university/college advisor or a third party advisor. A third party advisor could be a social worker, personal advisor or charity advisor (from organisations such as WeBelong, Become or StandAlone).

## What your nominated person needs to know

When they call us, they'll need to pass our security authentication using the details you provide on this form. They'll be able to discuss and ask for:

- any information about your account, except for your bank details
- the status of your application and any evidence that we need
- correspondence you've been sent or request forms for you

## What do I need to do?

Section A - Complete this if you want to give permission to an individual person.

**Section B** - Complete this if you want to give permission to a university/college advisor or a third party advisor.

You can set up CTS for both an individual person and an advisor using the same access code.

If any of the details on this form are left out, we can't set up CTS.

Once you complete this form, please return it with your application form.

## Is there a way to allow a third party to make updates to my account?

You can give Power of Attorney (PoA) to a third party. A PoA is an official document where you can appoint an attorney allowing them to release or update information relating to your account. A PoA must contain the specific period for which the third party can act as an attorney, and the specific tasks they can perform. You can still complete the sections of the form below and send us a copy of the PoA document. As above, the person holding PoA must pass our security authentication.

## I've changed my mind and no longer wish to give permission. What should I do?

You can remove your permission at any time. To do this, call us on 0300 200 4050 or write to us at:

#### Student Loans Company Limited 100 Bothwell Street Glasgow G2 7JD

Once you tell us that you want to remove your permission, your nominated person won't be able to access your account information.

## Section A - Permission for an individual person

Provide the details of the individual person. When they call, they'll need to confirm your full name, customer reference number and these details that you're providing before accessing your account.

Forename	
Surname	
Date of birth (DDMMYYYY)	
Relationship to you	
Access code/Password (this should be different from the password you use to sign into your account)	
Contact address	
Postcode	
Date you want permission to be active from	
Date you want permission to end (this can be updated/extended at any time).	

## Section B - Permission for university or third party advisor

Provide the details of the university or third party advisor. When they call, they'll need to confirm your full name, customer reference number and these details that you're providing before accessing your account.

#### Advisor details

Advisor forename

Advisor surname

Organisation name

Department

Job title

#### Access details

Access code/Password (this should be different from the password you use to sign into your account)

Date you want permission to be active from

Date you want permission to end (this can be updated/extended at any time).


## **Student Declaration**

I agree that the Student Loans Company Limited can exchange information about my student finance account with the person named.

I confirm where I have provided any personal information in relation to a third party, I have informed them of this.

Your customer reference number	
Your full name (in BLOCK	
Your signature (in ink)	Today's date (DDMMYYYY)
X	