

Education Maintenance Allowance (EMA) 2021/22



Application Notes

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



www.studentfinancewales.co.uk/ema

How to use these notes

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



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



Where you see this icon in the application form, it means that you need to send **evidence**. These notes will tell you exactly what we need from you. You should send **photocopies** of your evidence unless otherwise stated. We will return any original documents.

What is EMA?

Education Maintenance Allowance is a weekly payment of £30 to help 16, 17, and 18 year olds with the costs of further education.

Payments are made every 2 weeks as long as you continue to meet your school or college's attendance requirements.

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

Who can get EMA?

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

- You usually live in Wales.
- You're aged 16, 17 or 18.
- You're studying full time at high school or a minimum of 12 hours at a college that is approved by the Department for Education and Skills on an eligible course. Courses include Independent Living Skills or, if studying in England, Preparation for Adulthood.
- You're able to meet the nationality and residency requirements.
- You live in a household with an income of either:
 - £20,817 or less
 - or**
 - £23,077 or less **and** there's more than one young person who qualifies for Child Benefit in the household.

Additional help and information

For the most up-to-date information about EMA go to www.studentfinancewales.co.uk/ema

If you need to speak to someone about applying for EMA you can call **0300 200 4050 (Minicom 0300 100 1693)**.

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

Anything else?

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

Armed Forces

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

Section 1 Agreements and consent

Information Usage Summary

Student Finance Wales is the student finance service provided by the Student Loans Company Limited (SLC), funded by the Welsh Government. The Welsh Ministers have transferred certain functions relating to student finance applications to the SLC.

The information provided on this form will be used for the processing of the Education Maintenance Allowance application by the SLC and any subsequent administration relating to the funding. Each section that asks for your personal data is explained below:

- **Section 2 Student's details** – we will only use the information you provide in this section if we need to contact you or your nominated third party.
- **Section 3 Your payment details** – we will only use the information you provide in this section if we need to make payments to you or your nominated third party.
- **Section 4 Student's school or college details** – we will use the information you provide in this section to work out if you are studying at a school/college that is eligible to receive EMA.
- **Section 5 Student's nationality and residency details** – we will use the information you provide in this section to work out if you are eligible to receive EMA and to confirm your identity.
- **Section 6 Student's residence history** – we will only use the information you provide in this section to work out if you are eligible to receive EMA based on your residence history.
- **Section 7 Student's independence details** – we will only use the information you provide in this section to work out if you are dependent or independent. This is important because we will then be able to ask you for the specific financial information and/or evidence we need to work out if you are eligible to receive EMA.
- **Section 8 Financial details** – we will only use the information you and/or your parent(s)/partner provide in this section to work out if you are eligible for EMA based on your household income. This means sharing some of the data with HMRC.
- **Section 9 Student's family details** – we will only use the information you and your family provide in this section to work out if you are eligible for EMA based on your household income.

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 Privacy Notice available online at

www.studentfinancewales.co.uk/fe/privacy-notice

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

1.1 Authorised third party



By authorised third party we mean someone who is authorised to act and/or receive payments on the student's behalf. Evidence is required such as documentation from a local authority or a Power of Attorney. **See 1.2 below.**

1.2 Authorised third party



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

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

Examples include:

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

Section 2 Student's details

2.2 Personal details



We need proof of your age and identity, provide one of the following:

- your valid UK passport details as requested in section 5 of the application form; **or**
- your **original** valid non-UK passport; **or**
- your **original** birth/adoption certificate; **or**
- your **original** 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.

If you provide your valid UK passport details in section 5 you do not need to send us your passport.

If your UK passport has expired you must send your **original** UK birth or adoption certificate.

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

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

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

2.4 Contact details



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

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

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

Section 5 Student's nationality and residency details



EU and EEA nationals

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



Ordinarily resident

By 'ordinarily resident' we mean that you normally and lawfully live in the UK, EEA, Switzerland and Gibraltar through choice. If you have moved to the UK for education purposes, you must have been ordinarily resident in the EEA, Switzerland and Gibraltar prior to becoming ordinarily resident in the UK.



Break in residency

If you have not been ordinarily resident you may still be eligible for funding if you can show the break was temporary and you were planning on returning to the UK. If the break in residency was due to active service in the Armed Forces, you are still considered to be resident in the UK.

Examples of acceptable temporary breaks are:

- gap year
- voluntary work overseas
- parents working abroad on a temporary contract of employment

You need to send us evidence which can include but is not limited to:

- a letter from your learning provider confirming your gap year
- a letter from the employer on headed paper confirming your temporary employment and the dates worked
- a letter from the Armed Forces if applicable
- temporary visas or work permits in addition to the above

You must also be resident in Wales on the first day of the first academic year of your course to be able to get EMA.

If you need to send us your Biometric Residence Permit as evidence for any question in this section, be assured that we will only use it to validate your identity and residency status, no other data from it will be used or stored.

5.1 UK National



If you hold a valid UK passport enter these details. This means you don't need to send your passport to us.

If you don't hold a valid UK passport, you need to send us your original birth certificate.

We are unable to accept an expired passport as proof of your identity.

5.2 Irish Citizen



You need to send us:

- your original valid ROI passport; or
- your original national identity card.

We are unable to accept an expired passport as proof of your identity.

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

5.3 Family member of a UK national

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By family member, you must be the:

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

of a UK national.

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

You must also send proof of your relationship to the UK national. This may be:

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

If you are claiming student finance as the child or step-child of a UK national, the term 'child' means a person 'under the age of 21; or dependants of the person or the person's spouse or civil partner.'

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

5.5 'Settled or pre-settled status'

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To get student finance as an EU national with pre-settled status, you must provide evidence to show you are an EU national, by sending us your original EU passport or national identity card.

To prove your immigration status, you need to provide us with confirmation of your EU Settlement Status award from the Home Office, and a share code. Go to **www.gov.uk/view-prove-immigration-status** to generate the code. Once generated, the code will expire after 30 days. You should return your application form as soon as you generate your share code so we can check your status within the 30 days.

When giving your share code, we will check the details with the Home Office and confirm the information you have provided.

5.6 Child of a Swiss National

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Your parent or step-parent must have been granted settled or pre-settled status through the EU Settlement Scheme. You must have pre-settled status and be ordinarily resident in the UK, Gibraltar, 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 original passport or national identity card. You must also send us your birth certificate or equivalent.

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 of your course. 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 first academic year of your course. 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 Status award from the Home Office, and a share code. To prove your parent or step-parent's immigration status, you need to provide us with their date of birth and share code.

Go to **www.gov.uk/view-prove-immigration-status** to generate the codes. Once generated, the codes will expire after 30 days. You should return your application form as soon as you generate your share code so we can check your status within the 30 days.

When giving your share codes, we will check the details with the Home Office and confirm the information you have provided.

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

5.7 EEA or Swiss national Migrant Worker

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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.

The EEA or Swiss national must provide proof of their nationality with their original passport or national identity card. You must also send us your birth certificate or equivalent.

As proof of the current employment status of the EEA or Swiss national who is working, has worked or is looking for work, 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 your child, son or daughter-in-law or child's civil partner is the worker you must be dependent on them.

For children of EEA workers, the term 'child' means a person 'under the age of 21; or dependant 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 Status award from the Home Office, and a share code. To prove your family member's immigration status, you need to provide us with their date of birth and share code. Go to www.gov.uk/view-prove-immigration-status to generate the codes. Once generated, the codes will expire after 30 days. You should return your application form as soon as you generate your share code so we can check your status within the 30 days.

When giving your share codes, we will check the details with the Home Office and confirm the information you have provided.

You do not need to provide a share code if:

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

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

5.8 Settled status (indefinite leave to remain or right of abode)



'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'.
- You have a right of abode in the UK.

Further information about immigration issues can be obtained from the Home Office at **www.homeoffice.gov.uk**

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 letter with your application form.

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.

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

5.9 Discretionary leave as a result of a failed asylum application

5.10 Discretionary leave where no application for asylum has been made

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If you or your:

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

have Discretionary Leave to Remain in the UK:

- as a result of a failed application for asylum; or
- where no application for asylum has been made

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

Please send the original Home Office letter and immigration status document, normally a passport or Biometric Residence Permit of the person who holds Discretionary Leave to Remain. You should also send evidence of your relationship to the person who holds this 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 someone who has been granted this status, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

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

Expiry date

If you or your:

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

were granted Discretionary Leave to Remain without an expiry date, you should mark the expiry date box as N/A (not applicable).

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

5.11 Leave to remain on the grounds of family life

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If you or your:

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

have leave to remain in the UK on the grounds of family life the Home Office will have sent you or them a letter and an immigration status document confirming this.

Please send the original Home Office letter and immigration status document, normally a passport or Biometric Residence Permit of the person who holds Discretionary Leave to Remain. You should also send evidence of your relationship to the person who holds this 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 someone who has been granted this status, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

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

Expiry date

If you or your:

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

were granted Discretionary Leave to Remain without an expiry date, you should mark the expiry date box as N/A (not applicable).

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

5.12 Leave to remain on the grounds of private life

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If you or your:

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

have leave to remain in the UK on the grounds of private life the Home Office will have sent you or them a letter and an immigration status document confirming this.

Please send the original Home Office letter and immigration status document, normally a passport or Biometric Residence Permit of the person who holds Discretionary Leave to Remain. You should also send evidence of your relationship to the person who holds this 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 someone who has been granted this status, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

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

Expiry date

If you or your:

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

were granted Discretionary Leave to Remain without an expiry date, you should mark the expiry date box as N/A (not applicable).

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

5.13 Leave to remain outside the immigration rules



If you or your:

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

have leave to remain in the UK outside the immigration rules the Home Office will have sent you or them a letter and an immigration status document confirming this.

Please send the original Home Office letter and immigration status document, normally a passport or Biometric Residence Permit of the person who holds Discretionary Leave to Remain. You should also send evidence of your relationship to the person who holds this 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 someone who has been granted this status, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

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

Expiry date

If you or your:

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

were granted Discretionary Leave to Remain without an expiry date, you should mark the expiry date box as N/A (not applicable).

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

5.14 Stateless Person

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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 original 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.

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

5.15 Refugee Status

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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 original 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).

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

5.16 Humanitarian Protection

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If you or your:

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

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

Please send the original Home Office letter and an Immigration Status Document, normally a passport or Biometric Residence Permit, of the person who has been granted Humanitarian Protection. You should also send evidence of your relationship to the person who has been granted Humanitarian Protection 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 person granted Humanitarian Protection, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

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

5.17 Child of a Turkish Worker

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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, EEA, Switzerland or Turkey for three years prior to the first day of your first academic year.

Please send the original Home Office letter and your Biometric Residence Permit.

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

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

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

You must also send the Home Office letter confirming your parent has extended leave to remain in the UK.

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

5.18 'Leave to Remain' in the UK under section 67 of the Immigration Act 2016

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

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

If you are claiming student finance as the dependent child or step-child of a person granted 'Leave to Remain' in the UK under section 67 of the Immigration Act 2016, 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.

5.19 Calais Leave

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If you have been granted Calais leave in the UK, or are the dependant 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 original Home Office letter and 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.

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

5.20 Leave to Remain as a victim of domestic violence

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If you have been granted 'Leave to Remain' as a victim of domestic violence, 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 original Home Office letter Biometric Residence Permit of the person who has been granted 'Leave to Remain' as a victim of domestic violence. You should also send evidence of your relationship to the person who has been granted 'Leave to Remain' as a victim of domestic violence 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' as a victim of domestic violence, 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.

5.21 Leave to Remain as a bereaved partner

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If you have been granted 'Leave to Remain' as a bereaved partner, 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 original Home Office letter Biometric Residence Permit of the person who has been granted 'Leave to Remain' as a bereaved partner. You should also send evidence of your relationship to the person who has been granted 'Leave to Remain' as 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' 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.

Section 7 Student's independence details

7.2 I think I should be an independent student



If you've been advised to continue as a dependent student (i.e. you're financially dependent on your parent/guardian) but still consider yourself an independent student – call us on **0300 200 4050** to discuss your situation.

7.3 Living under the care of a Local Authority or foster parent(s)



If at any point from the age of 14 to the first day of the first academic year of your course you:

- have not been under the legal care of your parents for a combined total of at least 13 weeks; **or**
- were under a special guardianship order, in the custody or legal care of, or have been given accommodation by a Local Authority for at least 13 weeks.

If you returned to the legal care of your parents between the ages of 14 and 16 (before the start of your course), you may still be considered a care leaver.

You need to send us:

A letter from your Local Authority confirming your current address and whether you are, or have been, in care. This letter must be on headed paper. It needs to be signed and dated by an authorised official from your Local Authority, with an official stamp.

e Receiving Income Support, income-related Employment and Support Allowance or Universal Credit in your own name



You need to send us:

- your current benefits statement for 6 April 2020 to 5 April 2021; **or**
- your Tax Credit Award Notification for 6 April 2020 to 5 April 2021; **or**
- your Universal Credit Award Notification for 6 April 2020 to 5 April 2021.

e Responsible for a child



You need to send us:

- your most recent Child Benefit statement; **or**
- your child's **original** birth certificate.

e Currently a young person in custody/detention within the Youth Justice System



This could be in a Young Offender Institution (YOI), Secure Training Centre (STC) and/or Secure Children's Home (SCH).

You need to send us:

- a letter on headed paper from your key worker which must:
 - confirm your period and place of detention; **and**
 - confirm your nationality/residence details; **and**
 - confirm that you consent to your key worker to act on your behalf for the purposes of EMA; **and**
 - be signed and dated by both you and your key worker.

Section 8 Financial details

Part A



Self assessed

If you completed an online tax return

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

If you completed a paper tax return

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



Data sharing

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

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

Part B

Financial information for tax year 2019-20



If your household income has permanently dropped since 2019-20



To be eligible to get EMA payments your total household income amount must be either:

- £20,817 or less; **or**
- £23,077 or less **and** there's more than one young person who qualifies for Child Benefit in the household.

If in tax year 2019-20 you earned over this threshold, but since, your income has permanently dropped below it you can be considered for EMA using your current household income.

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

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

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

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

If there are two parents/guardians in your household

If the income has dropped for one parent/guardian, the other must also provide evidence of their earnings.

Section 8 Financial details (continued)

8.3 Income from salary or wages



If as part of your salary or wages for tax year 2019-20 you received **tips and other payments** that did not show on your P60, you still need to include this figure when providing your total income amount earned from employment.

Income from taxable state benefits



Only include income received for the following benefits:

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

8.5 Income from savings and investments



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

Only tell us about the amount of interest/income you gained from savings and investments during tax year 2019-20, not the actual amount of savings or invested sums you had.

Total interest from UK banks, building societies and unit trusts



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

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


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

Section 8 Financial details (continued)

 Total income from UK life insurance gains, securities and partnerships


This includes:

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

 Total income from UK investments and dividends

This includes:

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

 Total income from foreign investment and dividends

This includes:

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

Section 8 Financial details (continued)

8.6 Taxable benefits in kind



This includes:

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

Part C

Any other income

8.8 Income from self-employment



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

Total adjusted profit from businesses

This includes:

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

Total adjusted profit from partnerships

This includes:

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

8.9 Income as a Minister of religion



This includes:

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

Section 8 Financial details (continued)

8.10 Any other taxable income or lump sums



This includes:

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

8.11 Income from property lettings



This includes:

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

8.12 Income from UK trusts



This includes:

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

8.13 Foreign income



This includes:

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

Section 8 Financial details (continued)

8.14 Income from an overseas pension



This includes:

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

8.15 Other overseas income and gains



This includes:

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

Part D

Income deductions


8.18 Allowable expenses on which you claimed tax relief



This includes:

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

Section 9 Student's family details


- 9.2**  Ineligible as earning over the maximum threshold for EMA entitlement

To be eligible to get EMA payments your total household income amount must be either:

- £20,817 or less; **or**
- £23,077 or less **and** there's more than one young person who qualifies for Child Benefit in the household.

If your household income is £23,078 or more you are not eligible to receive EMA payments.

If you want to speak to someone about your specific situation you can call **0300 200 4050**.

- 9.3**  Other young people in the household who are:

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

You need to send evidence for each child you named in 9.3

If they're under 16; send us:

- your household's most recent Child Benefit statement; **or**
- the child's birth certificate; **or**
- your household's most recent Tax Credit Award Notification that lists each young person.

If they're 16, 17, 18, 19 or 20; send us:

- your household's most recent Child Benefit statement; **or**
- your household's most recent Tax Credit Award Notification that lists each young person; **or**
- the child's birth certificate **and** a confirmation of enrolment or award from a Further Education Institution as proof that the child has been accepted onto a course.

Additional Information

When will I get paid?

Before we can make payments:

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

We'll pay you every 2 weeks on a Monday.

For example, if you're approved to receive EMA and your school or college confirms your attendance, we'll pay you £60 every 2 weeks.

If your next payment day falls on a bank holiday we'll pay you on the next working day. If you've given your mobile phone number in section 2, we'll text you to let you know when you'll get your EMA.

You won't get EMA payments during term holidays as EMA is not paid when your school or college is closed.