

# Fee Support and Course Grant Part-Time Students

## Higher Education Student Finance in Wales 2017/18 Academic Year – Version 0.1 April 2017

This guidance is not exhaustive and is not a substitute for consulting The Education (Student Support) (Wales) Regulations 2017.

Full details are contained in The Education (Student Support) (Wales) Regulations 2017, which are the legal basis of the student support arrangements for the academic year 2017/18.

This guidance chapter deals with Part-time Tuition Fee Loan, Fee Grant and Course Grant only. Separate guidance is issued dealing with part-time grants for dependants.

### Disclaimer

This guidance is designed to assist with the interpretation of the Regulations as they stand at the time of publication. It does not cover every aspect of student support nor does it constitute legal advice or a definitive statement of the law. Whilst every endeavour has been made to ensure the information contained is correct at the time of publication, no liability is accepted with regard to the contents and the Regulations remain the legal basis of the student support arrangements for the academic year 2017/18. In the event of anomalies between this guidance and the Regulations, the Regulations prevail. Please note the Regulations are subject to amendment.

Please note this guidance is for Welsh domiciled students only.

### Further Information

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A	Update Log
B	Contact Details
C	Student Loan Company Contact Details

### Abbreviations

Abbreviation	Full
DSA	Disabled Students' Allowance
ESA	Income-based Employment and Support Allowance
FTE	Full-Time Equivalent
HEP	Higher Education Provider
PCEA	Post Compulsory Education Allowance

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## 1 INTRODUCTION

This section provides details on the eligibility criteria for the financial support package (Part-time Tuition Fee Loan, Fee Grant and Course Grant) for part-time students along with guidance on processing applications for support for part-time students. Information on Disabled Students’ Allowances (DSAs) can be found in the guidance chapter ‘Disabled Students’ Allowances’.

For guidance on part-time dependants' grants see the separate guidance 'Part-time Dependants' Grants 2017/18'.

## **2 GENERAL**

### ***2.1 Fee support for part-time courses – students starting a course on 1 September 2014 or later***

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Students who start a part-time course on or after 1 September 2014 may be eligible for a non-means tested part-time tuition fee loan (Regulation 86) of up to £2,625 (studying in Wales) or £6,935 (studying elsewhere in the UK), where the course is provided by or on behalf of a publicly funded institution. Although part-time fees charged by Higher Education Providers (HEP) in Wales will not be regulated in AY 2017/18, HEPs will be expected to charge no more than the maximum amount of support available for a publicly funded course.

Where the course is wholly provided by a private institution, the maximum tuition loan available is £2,625 (studying in Wales) or £4,625 (studying elsewhere in the UK). Note that tuition charges for courses wholly provided by private institutions are not capped and the student will therefore have to self-fund any tuition charge that exceeds the maximum loan available.

In order to be eligible for a part-time tuition loan, intensity of study must be at least 25% of a full-time equivalent course in each year of the course and over the whole duration of the course. However, the amount of part-time tuition loan available is not linked to the intensity of study.

See section 4 below for more information on intensity of study.

Payment of part-time tuition loans will be made directly to the HEP. No payment of part-time tuition loan will be made until the student has been undertaking the course for at least two weeks of the academic year (in the first year and each subsequent year of the course).

Regulation 101(c)(ii) provides that institutions are required, where a student starts a course on or after 1 September 2014, to confirm that the applicant has enrolled on that academic year of the designated part-time course and has undertaken two weeks of the course (in the first year and each subsequent year of the course).

### ***2.2 Fee support for part-time courses – students starting a course before 1 September 2014***

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In 2017/18 all eligible part-time students who are continuing on a part-time course that they started before 1 September 2014 and who meet the qualifying conditions, will be entitled to apply for a means tested fee grant in respect of tuition fees (Regulation 85).

The maximum amount of fee grant available also depends on the student's intensity of study. For students studying at an intensity of less than 60% full-time equivalent (FTE), the maximum fee grant available will be £690. For those studying at 60% FTE or more but less than 75% FTE, the maximum fee grant available will be £820. For those studying at 75% FTE and above, the maximum fee grant available will be £1,025. An eligible student who meets the qualifying conditions will be entitled to up to either the limit determined according to the intensity of study or the tuition fee charged by the HEP, whichever is the lower. Payment of fee grant will be made direct to the HEP.

See section 4 below for more information on intensity of study for part-time fee grant.

### ***2.3 Course Grant – New and Continuing Students***

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A fully means-tested grant in respect of course expenditure (for books, travel and other expenditure relating to their course) is available to eligible new and continuing students. The maximum amount of course grant will be £1,155 in 2017/18. Payment of the grant is made by SLC in a single instalment directly to the student.

### **3 INTENSITY OF STUDY - GENERAL**

Intensity of study is calculated by using the formula PT (part-time) divided by FT (full-time) and multiplied by 100 to obtain a percentage figure.

In this formula PT represents the number of modules, credits, credit points or other similar unit of measurement used by the academic authority that will be awarded to the student if they successfully complete the academic year for which they are applying for support.

FT represents the number of modules, credits, points or other similar unit of measurement specified by the academic authority that a standard full-time student would be required to complete in an academic year in order to complete the full-time equivalent within the period ordinarily required to complete that course.

#### ***3.1 Intensity of study – fee grant and course grant (Regulation 85)***

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Fee grant and course grant are only available where the student takes no more than twice the number of years required to complete an equivalent full-time course. It is however possible to vary the intensity of study level in any one academic year as long as the overall length of the course remains at least 50%.

Please note this only applies for courses that started prior to 1 September 2014.

#### ***3.2 Intensity of study – New part-time course grant (Regulation 87)***

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A new eligible part-time student who starts their course on or after 1 September 2014 does not qualify for a new part-time course grant if the intensity of study during that year is less than 50% even where the overall length of the course remains at least 50% (Regulation 87 (2)).

#### **Example**

Student A is taking a part-time degree course which lasts six years. An FTE course would last three years. To calculate their intensity of study:

3 divided by 6 = 0.5, multiplied by 100 = 50.

The student is therefore studying at an intensity level of 50%

Regulation 101 states that institutions are required to certify all application forms submitted by students undertaking courses with them, where the student started the course before 1 September 2014. Where an applicant is applying for support for the first time, the institution must confirm that the applicant has been undertaking their designated part-time course for at least two weeks (regulation 101(4)(a)(ii)).

New and continuing part-time students with disabilities who meet the qualifying conditions will be able to get DSAs, and the amounts available to eligible part-time students for the current academic year are detailed in Regulation 88. Further advice is available in 'Disabled Students' Allowances' guidance for 2017/18.

The eligibility criteria for part-time student support consists of three elements:

- Course Eligibility
- Personal Eligibility
- Financial Entitlement (Grants only)

## 4 COURSE ELIGIBILITY

To potentially qualify for grants (including DSAs) the student must undertake a designated part-time course. Regulation 83 sets out which courses are considered as designated part-time courses. A part-time course will be a designated part-time course if it meets the criteria in Regulation 83(1) or it has been designated by the Welsh Ministers under Regulation 83(6).

The criteria in Regulation 83(1) are:

- the course is one listed in Schedule 2 to the Regulations;
- the course must last for at least one academic year;
- it must be ordinarily possible to complete the part-time course within not more than
  - twice the period ordinarily required to complete the full-time equivalent course where the course began before 1 September 2014; or
  - four times the period ordinarily required to complete the full-time equivalent where the course begins on or after 1 September 2014
- the course is wholly provided by publicly funded institutions in the UK or by such institutions in conjunction with institutions outside the UK;
- the course is not designated under Regulation 5 of the Regulations; and
- the course is not designated under Regulation 66 of the Regulations.

One year 60 credit courses can be supported provided that they are not Access/Foundation year courses, unless the one year foundation course is an integral part of a longer course on which the student is enrolled to study. More guidance on integral foundation years can be found in the 'Assessing Eligibility' Guidance. However, in order for foundation years to be integral, the year should not lead to an award in its own right and students should enrol at the outset for the duration of the whole course.

In addition, Regulation 83(6) allows Welsh Ministers to specifically designate courses which do not meet the criteria above. See above for further information.

A course is provided by an institution if it provides the teaching and supervision which comprise the course (Regulation 83(4)(a)). Where a course is franchised, SFW should identify the institution or institutions providing the course. If the course is wholly provided by one or more publicly funded institutions and meets the other requirements of Regulation 83(1), the course will be automatically designated. If the course is wholly provided by a private institution or provided jointly by a publicly funded and private institution, specific designation for the course will have to be sought from the Welsh Government.

ITT courses that are at least 1 year in length and do not meet the minimum 300 hours in each academic year criteria for full-time non-first degree courses are considered to be part-time ITT courses if the intensity of study is at least 50% of an equivalent full-time course over the duration of the part-time course. These courses attract the part-time support package only, regardless of whether or not the course leads to a first degree.

All students commencing part-time undergraduate courses or part-time ITT courses that do not lead to a first degree in academic year 2017/18, and those students continuing in 2017/18 on such a course which commenced on or after 2010/11, are eligible for the part-time support package.

### **4.1 Length of Course**

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Part-time courses must last for at least one academic year in order to qualify.

## 4.2 Course Load

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In order for a course to be designated under Regulation 83(1) it must be ordinarily possible for the relevant part-time course to be completed in not more than

- twice the period ordinarily required to complete the full-time equivalent course where the part-time course began before 1 September 2014; or
- four times the period ordinarily required to complete the full-time equivalent course where the part-time course begins on or after 1 September 2014.

An eligible part-time student who undertakes a designated part-time course will cease to be eligible for support in connection with that course if it becomes impossible for the student to complete the course in the period (see above) even if they increase their intensity of study (Regulation 84(5)). The student's eligibility for support will terminate at the end of the academic year in which it becomes clear that they cannot complete the course in the required period.

The initial expectation must be that a student will complete their course in not more than one of the periods set out above. How long a student is expected to take to complete their course will need to be assessed each time that the student applies for support for an academic year of the course. For example, a student started a part-time course in AY 2014/15 and is continuing on that course in AY 2017/18. The student has to repeat the second year of study in year 4 because they failed their exams in year 3. In order to be able to get support for year 4, it must still be possible for the student (with or without an increase in intensity of study) to complete the course within not more than twice the length of time it would ordinarily take to complete the equivalent full-time course.

Provided that it remains possible for a student to complete the course within the required period, the Regulations allow for flexibility in course load in each academic year. Some institutions encourage part-time students to take a lower course load in their first year while they adjust to the requirements of taking a higher education course. Institutions generally provide flexibility to allow students to decide the amount of time they can devote to a course, offering students the opportunity to take a lower number of modules in any year if necessary. However, institutions should keep in mind the requirement in respect of the period a student will take to complete their course (see above). It should be noted that the new course grant is not available for the Academic Year where the intensity of study is less than 50% even if overall length of the course remains at least 50%. (Regulation 87(2)).

Where students who start a course before 1 September 2014 and who are continuing on that course in AY 2017/18 take less than 50% FTE course load in any one academic year may still be eligible for financial assistance as long as they are still on track to complete their part-time course in no longer than twice the time it would take to complete a full-time course leading to the same qualification. Where the student starts the course on or after 1 September 2014, they will be eligible for fee support where the course load is at least 25% of an equivalent full-time course (FTE) in each year of the course and for the overall duration of the course. The student will have to meet the general personal eligibility criteria and, if applying for grants, the financial entitlement criteria, in order to be entitled to financial support.

## 5 PERSONAL ELIGIBILITY

The personal eligibility criteria for receiving support to undertake a part-time designated course are set out in Regulation 81. Regulation 84 sets out the additional criteria that a student must satisfy in order to qualify for fee grant and course grant. Some of the criteria are the same as those for full-time students:

- Default/non-ratification of previous loans;
- Fitness to receive support; and

- Residence.

Guidance on the elements in common with the requirements for full-time students can be found in the 'Assessing Eligibility' Guidance.

Students will not be eligible for support if:

- They are eligible to apply for certain healthcare bursaries in respect of their course as set out in Regulation 81(3). These include:
  - any healthcare bursaries as defined in Regulation 2;
  - any Scottish healthcare allowances (as defined in Regulation 2);
  - any Scottish nursing and midwifery allowances under the Nursing and Midwifery Student allowances (Scotland) Regulations 1992.
- They already hold an Honours degree from a UK institution. Students who hold qualifications below degree level (e.g. HND, HNC) are not prevented from qualifying for support by virtue of this provision and neither are students who failed to complete a degree course previously, if they meet the other eligibility criteria. New students holding other UK first degrees (ie a Foundation degree or an Ordinary degree) will be eligible for student support for a part-time course or full-time distance learning course as long as they are topping up their qualification to an Honours degree.
- They have already received a maximum of eight years of statutory support for part-time study, where the current part-time course started before 1 September 2014. As support for part-time students was first introduced in 2000/01, students in 2017/18 may be disqualified from part-time support on the grounds of already receiving eight years worth of relevant support (see Regulation 81(16) and 81(17)).
- They were eligible to apply for a maximum of sixteen academic years grant or loan support for previous part-time courses, where the student starts the course on or after 1 September 2014. Years of previous study that will be taken into account are years of previous part-time study where the student submitted an application for part-time student support (loan or grant) and received part-time support (see Regulation 81 (16)). Years of previous part-time study where the student did not apply for any student finance from SLC, or did not receive such support will not be counted. Years of previous full-time study will also not be counted.

The previous study rules in Regulation 81 do not apply in relation to part-time DSAs. Regulation 88 sets out the criteria that apply in addition to those in Regulation 81.

Students who are taking more than one part-time course at the same time can only be eligible for support for one of the courses, regardless of when they began either course. If a student completes or abandons the course for which they have been assessed for support, and they have not already had the maximum number of years of support available to them (subject to the criteria above), they may be eligible for financial assistance in respect of the second course (as long as it is a designated part-time course) up to a maximum of eight or sixteen years support in aggregate, as outlined in regulation 81(16) and (17).

Students who are taking a full-time course and a part-time course or a postgraduate course and a part-time course at the same time can only be eligible for support under The Education (Student Support) (Wales) Regulations 2017 for one of those courses. The student will have to choose which one to apply to for support. This will usually be the course which attracts most support (i.e. the full-time course).

Prisoners serving custodial sentences who started a part-time course before 1 September 2014, and who are continuing on that course on or after 1 September 2014, are not eligible for support. However, this rule does

not apply in respect of an academic year in which the student enters prison to serve such a sentence or is released from prison having served such a sentence. A prisoner who starts a course on or after 1 September 2014 and who is an eligible prisoner as defined in regulation 2(1) will be eligible for a part-time tuition fee loan only. Course Grant, targeted grants and DSAs will not be available to eligible prisoners who start a course on or after 1 September 2014.

The support that a student qualifies for is also affected by the category in Schedule 1 to the Regulations into which they fall and the location of study:

- All eligible part-time students who are not prevented from receiving fee support by the previous study rules and who are undertaking their course in Wales are eligible for the fee grant in accordance with regulation 85 (where the student started the course before 1 September 2014).
- Eligible part-time students (other than those who fall within paragraph 9 of Part 2 of Schedule 1 to the Regulations and within no other paragraph of that Schedule) who are not prevented from receiving the course grant by the previous study rules and who are undertaking their course in the United Kingdom are eligible for the course grant in accordance with Regulation 87.
- The Welsh Ministers have the discretion to pay support to assist with fees to an eligible part-time student who is attending a course in England, Scotland or Northern Ireland in accordance with Regulation 100.
- Students undertaking courses on a distance learning basis are deemed to be taking the course where they are actually studying e.g. at their home address. A student studying at home in Wales and taking a distance learning course provided by a Scottish, English, or Northern Irish institution could qualify for both the full course and fee support. Where a student is taking a course which involves both distance learning and attendance at an institution, it is where the student studies for the majority of the year that determines their place of study. For example, if the student spends 20 weeks of a 30 week course distance learning at their home address in Wales and physically attends an institution in Scotland for 10 weeks, they will be treated as studying in Wales.
- Students who are domiciled in Scotland, England, or Northern Ireland fall under the student support arrangements operated by the Scottish Executive, the Department of Education (England), or the Department for the Economy (Northern Ireland) respectively. Students who are not ordinarily resident in the UK prior to the start of their course but who are studying in a devolved administration should apply to the Devolved Administration in whose area they are studying e.g. a French national who lives in Paris and goes directly to study in Edinburgh applies under the arrangements operated by the Scottish Government.

With regard to fee support, for part-time distance learning courses, although a student does not need to physically attend their institution, they do have to be undertaking the course whilst resident in Wales. With regard to the course grant, although a student does not need to physically attend their institution, they do have to be undertaking the course in the UK. In the Welsh Government's view, a student is undertaking their course in Wales if the student is attending an institution in Wales or is studying via distance learning from home in Wales for the majority of the course. For example, this would disqualify any student from receiving fee support if they were studying via distance learning from the student's home which is outside Wales, or if they spent less than the majority of the course in Wales. Similarly, a student is undertaking the course in the United Kingdom, in the Welsh Government's view, if the student is attending an institution in the UK or is studying via distance learning from their home in the United Kingdom for the majority of the course. This means, for example, that a student taking a course provided by an institution in Wales via distance learning from home in France would not qualify for fee or course support.

The general rule is that a student must fall within one of the categories in Schedule 1 to the Regulations at the start of the first academic year of the course in order to potentially qualify for support in connection with a designated part-time course. However, there are certain circumstances in which a student may become eligible for support during the course of an academic year. Regulation 82(3) and (4) sets out the circumstances in which a student may become eligible for support during the course of an academic year and the types of support that the student may potentially be eligible for in that academic year. For example, a student who is recognised as a refugee during the course of an academic year could potentially qualify for the fee loan and course grant for that academic year (and the remainder of the course).

### **5.1 Changes from 2017/18**

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#### **NHS:**

As part of the NHS bursary reforms, from 1<sup>st</sup> August 2017 new Nursing, Midwifery and allied health professions (AHP) students studying in England will no longer receive the current package of NHS grants and bursaries. They will now have access to the same student finance system as other undergraduate students. Students studying eligible part-time healthcare courses in Wales retain the current bursary package, subject to meeting a new eligibility requirement. Students studying an eligible healthcare course in Wales now must sign an agreement to work in the NHS in Wales for 2 years in order to be eligible for the healthcare bursary; this will apply to all students (Wales and rUK domiciled). Where the student agrees to the 2 year tie in they are eligible to apply for the bursary, and will only receive the applicable RRML package from SFE/SFW/SFNI/SAAS. If the student chooses not to agree to the 2 year tie-in, they will be ineligible for the healthcare bursary and will qualify for the standard undergraduate package of support from SFE/SFW/SFNI/SAAS.

#### **Exception Courses:**

- A new exception is being introduced in AY 2017/18 to the general rule that no further student support is available once a student has achieved a UK Honours degree. An eligible student who holds an Honours degree from a UK educational institution, and who starts a part-time Honours degree level course in;
  - B – Subjects Allied to Medicine
  - C – Biological Sciences
  - D – Veterinary Sciences, Agricultural & Related subjects
  - F – Physical Sciences
  - G – Mathematical Sciences
  - H - Engineering
  - I- Technology
  - J - Computer science
  - Q - Welsh language

will eligible to apply for part-time support for the new course.

#### **Armed Forces:**

- From 2017/18, serving members of the Armed Forces and their families undertaking part-time distance learning courses so that eligible students who are either:
  - UK Armed Forces personnel serving overseas; or
  - Family members living with UK Armed Forces personnel serving overseas;

are eligible for support for a part-time distance learning course.

Students must be starting a designated part-time distance learning course on or after 1 August 2017 or have previously started a part-time distance learning course before 1 August 2017, and continuing on that course in AY 2017/18, to qualify for student support.

Students will be able to apply for support if they were considered ordinarily resident in Wales before moving overseas.

Members of the Armed Forces serving overseas, and their family members (who have moved to live with them), studying towards an FT or PT distance learning course, will be eligible to apply for :

- **Fee Loan**; or
- **Contribution to costs loan**; and where applicable
- **Disabled Students' Allowances**
- **Fee Grant**
- **Course Grant**

## **5.2 Financial Entitlement**

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All eligible students, new and continuing, can apply for a means tested course grant. Eligible students who are continuing on a part-time course that they started before 1 September 2014 can apply for a means-tested fee grant. Students who start a course on or after 1 September 2014 can apply for a non means tested part-time Tuition Fee Loan.

The amount of fee grant and course grant (students who started a course before 1 September 2014) or course grant only (students who start a course on 1 September 2014 or later) payable to an eligible part-time student is determined by a meanstest. There is a single meanstest based on the student's and, where appropriate, their partner's gross income from all sources in the preceding financial year, and the number of dependent children in the student's family. Gross income excludes any child tax credits, working tax credits or Universal Credit received by the student or, where relevant, their partner.

For students starting the 2017/18 academic year before 1<sup>st</sup> July 2017, the previous financial year covers the period 6<sup>th</sup> April 2016 – 5<sup>th</sup> April 2017. For students starting the academic year on or after 1<sup>st</sup> July 2018 the previous financial year covers the period 6<sup>th</sup> April 2017 – 5<sup>th</sup> April 2018.

The income of a Spouse, Civil Partner or Cohabiting partner (of either sex) will be taken into account when assessing a student's entitlement.

A student can, under certain circumstances, elect to have their application assessed on the basis of their income in the current financial year. To qualify for a current year assessment, the student's income (taking into account the income of their spouse, civil partner, or cohabiting partner, where appropriate) must be at least £1,000 less in the current financial year than the previous financial year.

Please note – SFW is obliged to undertake an in-year reassessment in these cases.

Students who are in receipt of any of the following income assessed benefits at the time when they apply for the grants, or whose spouse's, civil partner's, or cohabiting partner's income is taken into account and is in receipt of one of these benefits, will not be means-tested and will therefore qualify for the maximum amount of assistance payable under Regulation 85(1) and Regulation 87.:

- Universal Credit
- Income Support
- Housing Benefit
- Local Housing Allowance

- Income based Jobseeker's Allowance (JSA)
- Income-based Employment Support Allowance (ESA)

at the time when they apply for the grants, or whose spouse's, civil partner's, or cohabiting partner's income is taken into account and is in receipt of one of these benefits, will not be means-tested and will therefore qualify for the maximum amount of assistance payable under Regulation 85(1) and Regulation 87.

There are two types of JSA: contribution-based and income-based. Contribution-based JSA is not means tested and so does not appear on the above list. As most students in receipt of income-based JSA will also be in receipt of Housing Benefit, administrators can look to that benefit first as evidence of automatic qualification for support. For those only in receipt of JSA, the claimant's benefit notification should specify which type of JSA they are receiving. Those receiving contribution-based JSA should have the lettering 'JSA C' on their notification. The notification for those receiving income-based JSA should have the lettering 'JSA IB'. It is possible for a claimant to receive both contribution-based and income-based JSA. A student can receive student support providing they are receiving income-based JSA; it does not matter if they are receiving contribution-based JSA in addition to this.

Those students who are not in receipt of one of the benefits (listed above) will need to have their income assessed. Receipt of the Working Tax Credit or the Child Tax Credit does not make applicants for support for part-time study automatically financially eligible but they do not count as income for the purposes of assessment.

The following disregards will apply when calculating an eligible part-time student's relevant income:

- £2,000 allowance for the student's partner (partner is defined in Regulation 85(7)(f));
- £2,000 for an only or eldest dependent child; and
- £1,000 each for any subsequent dependent children.

A child for these purposes includes any child for whom the student has parental responsibility and the child of a partner where the partner's income is taken into account. Partner is defined in Regulation 85(7) (f). The disregards are applied where the child is wholly or mainly financially dependent on the student, or the student's partner.

## **6 INCOME ASSESSMENT OF COURSE GRANT ONLY – STUDENTS STARTING A PART-TIME COURSE ON OR AFTER 1 SEPTEMBER 2014**

Regulation 87(5) sets out that the income threshold is set at £28,180; a student with an assessed income less than £26,095 will be entitled to the maximum amount of course grant available under Regulation 87(4).

As a consequence of applying the means-test the student may receive:

- No support – zero award.
- Full support - £1,155 course grant.
- Partial support – the minimum course grant that the student would receive is £50.

The taper system will operate as follows:

- A student with relevant income less than £26,095 would receive the full course grant available

- Thereafter, if the student’s income is £26,095 or more the amount of course grant will reduce until eventually it will be exhausted. The taper is set at £1 in every £1.886. This means that a student with a relevant income level of over £26,095 and up to £28,180 will be entitled to a partial course grant.
- A student with an income level of exactly £28,180 will be entitled to a course grant of £50.
- A student with a relevant income level of more than £28,180 will not receive any course grant.

Some examples of the operation of the taper are shown below:

Single student, no dependants

Relevant Income	Effect of taper (student could receive).
Less than £26,095	Full course grant of £1,155.
£26,095 but less than £28,180	Course grant of £1,155 less £1 for every £1.886 of income (before tax) over £26,095.
£28,180	£50 course grant.
Over £28,180	Nil.

Married student, 2 dependent children

Note: Students with an adult or child dependant may also qualify for additional grant support – SFW should also refer to ‘Part-time Dependants Grants Guidance 2017/18’.

Relevant Income	Effect of taper (student could receive).
Less than £31,095	Full course grant of £1,155.
£31,095 to less than £33,180	Course grant of £1,155 less £1 for every £1.886 of income over £31,095.
£33,180	£50 course grant.
Over £33,180	Nil.

The term “Relevant income” is defined in Regulation 85(8).

## **7 INCOME ASSESSMENT OF FEE GRANT AND COURSE GRANT – STUDENTS CONTINUING ON A PART-TIME COURSE THEY STARTED BEFORE 1 SEPTEMBER 2014**

Regulation 85(5) sets out that the income threshold is set at £16,865; a student with an assessed income of less than £16,865 will be entitled to the maximum amount of assistance available under Regulation 85(1).

As a consequence of applying the means-test the student may receive:

- No support – zero award.
- Full support - £1,155 course grant and £690/£820/£1,025 fee grant (depending on the intensity of study) or a grant to the fee level charged by the HEP, whichever is the lower.
- Partial support – the award is reduced by a minimum of £50. The minimum amount that the student would receive is £50 for the total available by way of fee support and the course grant.

The taper system will operate as follows:

- A student with relevant income of less than £16,865 would receive both the full fee and course grant available:

- A student with relevant income level of £16,865 would receive a reduction of £50 on the maximum amount of fee grant available to him. He would be eligible to receive the full course grant;
- Thereafter, as the student's income increases over £16,865 the total amount of the award will reduce, until eventually it will be exhausted. The point at which payment of fee support ceases will be the same for each of the three fee grant maxima. Therefore, there will be three different fee grant taper rates in operation: £1 in every £14.52 for students studying at less than 60% of the full-time equivalent (FTE); £1 in every £11.90 for students studying from 60% to less than 75% FTE; and, £1 in every £9.26 for students studying at 75% FTE or more.
- A student with relevant income of £16,865 or more but less than £25,435 will receive a partial fee grant and, if eligible, a full course grant. See Regulation 85 (4) and (5) for the method of determining the amount of fee grant.
- A student with relevant income of exactly £25,435 will receive a fee grant of £50 and, if the student is eligible, a full course grant.
- A student with a relevant income of over £25,435 up to £26,095 will receive no fee grant, but, if eligible, the full course grant of £1,155.
- Thereafter, as the student's income increases over £26,095 the amount of course grant will reduce until eventually it will be exhausted. The taper is set at £1 in every £1.886. This means that a student with a relevant income level of over £26,095 and up to £28,180 will be entitled to a partial course grant.
- A student with an income level of exactly £28,180 will be entitled to a course grant of £50. No fee grant will be payable.
- A student with a relevant income level of more than £28,180 will not receive any support.

Some examples of the operation of the taper are shown below:

Single student, no dependants

<b>Relevant Income</b>	<b>Effect of taper amount (student could receive).</b>
Less than £16,865	Full fee grant (up to £690/£820/£1,025 or the level of fees charged by the HEP, whichever is the lower). Full course grant of £1,155.
£16,865	A reduction of £50 from the fee grant will apply. Full course grant of £1,155
Over £16,865 but less than £25,435	A reduction of £50 from the fee grant will apply. Thereafter, a reduction of £1 from the fee grant would apply for each £14.52/£11.90/£9.26 of relevant income over £16,865 from the maximum amount of fee grant available. Full course grant of £1,155.
£25,435	£50 fee grant. Full course grant of £1,155.
Over £25,435 up to £26,095	No fee grant. Full course grant of £1,155.
Over £26,095 but less than £28,180	No fee grant. Course grant of £1,155 less £1 for every £1.886 of income over £26,095.
£28,180	No fee grant. £50 course grant.
Over £28,180	Nil.

Single EU student, no dependants

Relevant Income	Effect of taper amount (student could receive).
Less than £16,865	Full fee grant (up to £690/£820/£1,025 or the level of fees charged by the HEP, whichever is the lower).
£16,865	A reduction of £50 from the fee grant will apply.
Over £16,865 but less than £25,435	A reduction of £50 from the fee grant plus a reduction of £1 from the fee grant for each £14.52/£11.90/£9.26 of relevant income over £16,865.will apply
£25,435	£50 fee grant.
Over £25,435	Nil.

#### Married student, 2 dependent children

**Note:** Students with an adult or child dependant may also qualify for additional grant support – SFW should also refer to ‘Part-time Dependants’ Grants Guidance 2017/18’.

Relevant Income	Effect of taper amount (student could receive).
Less than £21,865	Full fee grant (up to £690/£820/£1,025 or the level of fees charged by the HEP, whichever is the lower). Full course grant of £1,155.
£21,865	A reduction of £50 from the fee grant will apply. Full course grant of £1,155
Over £21,865 but less than £30,435	A reduction of £50 from the fee grant will apply. Thereafter, a reduction of £1 from the fee grant would apply for each £14.52/£11.90/£9.26 of relevant income over £21,865 from the maximum amount of fee grant available. Full course grant of £1,155.
£30,435	£50 fee grant. Full course grant of £1,155.
Over £30,435 up to £31,095	No fee grant. Full course grant of £1,155.
Over £31,095 to less than £33,180	No fee grant. Course grant of £1,155 less £1 for every £1.886 of income over £31,095.
£33,180	No fee grant. £50 course grant.
Over £33,180	Nil.

The term “Relevant income” is defined in Regulation 85(8).

## **8 STUDENTS WHO TRANSFER FROM ONE DESIGNATED PART-TIME COURSE TO ANOTHER**

Where a student who qualifies for the payment of fee grant or fee loan transfers, after being assessed, from one designated part-time course to another within an academic year, the student is entitled to receive fee support for the second course provided this does not exceed the maximum amount of fee support to which the student is entitled for that academic year based on the course with the highest intensity of study. See Regulation 105(6) for students who started their course before 1 September 2014, or Regulation 102(7) for students who started their course on or after 1 September 2014.

#### **Example:**

A student who is entitled to full support starts studying course A at an intensity of 50% FTE, for which a fee of £500 is charged. He transfers, in the same academic year, to course B, now studying at an intensity of 75% FTE for which a fee of £800 is charged. The student’s relevant income means that the amount of fee grant that they can receive is £800 overall.

£800 is the maximum amount of assistance payable to the student in connection with course B which is the course with the highest intensity of study. The student has already received £500 for course A, so they can

receive a maximum of £300 fee grant in connection with course B. The student must pay the remaining tuition fee balance of £500.

## **9 STUDENTS WHOSE STATUS AS AN ELIGIBLE STUDENT IS CONVERTED TO THAT OF AN ELIGIBLE PART-TIME STUDENT**

Students can have their status as an eligible student converted to that of an eligible part-time student when they transfer from a designated full-time course to a designated part-time course (and vice versa). Where students transfer from a full-time course to the equivalent part-time course between academic years, the process is simple. Where the transfer took place before 1 September 2014, the student applied for the fee grant and course grant as a part-time student, rather than the loan and other grants as a full-time student. Where the transfer from a designated full-time course to a designated part-time takes place on or after 1 September 2014, the student applies for the part-time tuition loan and course grant as a part-time student. Subject to this section, as a student will cease to be an eligible student when they become an eligible part-time student, no further payments of full-time support should be made to the student. So for example, if the payment dates for full-time grants and loans is 1 September, 1 January and 1 April and a student ceases to undertake a designated course and transfers to take up a part-time course on 1 December, the student will not get paid any full-time grants and loans on 1 January and 1 April. Once SFW has entered the relevant dates into the LA portal and perform a reassessment, this will be handled automatically by Change of Circumstances functionality.

For students who were eligible to apply for a loan for living costs while they were a full-time student but did not do so or did apply but for less than the maximum available, the student can apply for a loan for living costs after they transfer to the part-time course. The amount of support they can apply for in this case is set out in Regulation 103(3)(d) and (4).

For information on how Disabled Students' Allowances are calculated in the event of a student transferring from a designated full-time course to a designated part-time course during an academic year, see Disabled Students' Allowances Guidance Chapter for 2017/18.

Where students transfer from undertaking a full-time course to a part-time course in the same subject or subjects leading to the same qualification at the same institution, the part-time course is to be treated as satisfying Regulation 83(1)(b) and (c) provided the period of part-time study to be undertaken by the student is of at least one academic year's duration and, in the case of a course that began before 1 September 2014, does not exceed twice the period ordinarily required to complete the remainder of the full-time course from which the student transfers. In the case of a course that began on or after 1 September 2014, it must be of at least one academic year's duration and must not exceed four times the period ordinarily required to complete the remainder of the full-time course from which the student transfers (please see the following examples).

### **Examples:**

*Student A* started a designated course leading to a BA in History in September 2013, which would normally be completed in three years if studied full-time. The student studies full-time in the first year, and transfers to the equivalent part-time course in the second year (i.e. a designated part-time course leading to a BA in History provided by the same institution). The student plans to complete the course at the end of four years' part-time study. The course will be treated as satisfying Regulation 83(1)(b) and (c) because the period of part-time study to be undertaken will last more than one academic year and will not exceed twice the period ordinarily required to complete the remainder of the designated course (i.e.  $2 \times 2 = 4$  years).

*Student B* starts the same designated full-time course in September 2015. The student completes two years as a full-time student and then transfers to the equivalent part-time course. The student plans to complete the designated part-time course after 5 years of part-time study. The course cannot be treated as satisfying Regulation 83(1)(b) and (c) because the period of part-time study to be undertaken will exceed twice the period required to complete the full-time course (i.e.  $1 \text{ year} \times 4 = 4$  years and the student intends to complete

their period of part-time study in 5 years). Student B cannot qualify for any further support in connection with that course.

## **10 STUDENTS WHOSE STATUS AS AN ELIGIBLE PART-TIME STUDENT IS CONVERTED TO THAT OF AN ELIGIBLE STUDENT**

Students who move from part-time courses to full-time courses between academic years simply apply for a different type of support that year. Where students transfer from a part-time course to a full-time course during an academic year they become entitled to a portion of the support available for full-time students. Any amount of support paid to the student under Part 12 of the Regulations for the relevant academic year is ignored when determining the amount of support to which the student is entitled in respect of that academic year.

Where students move to a full-time course during the first quarter of the academic year there is no reduction as a result of having spent time on a part-time course from any grants for living costs or loans for living costs for the full-time course for which they may qualify. Where they move to a full-time course during the second quarter of the year they are eligible for two thirds of the grants for living costs and loans for living costs for which they are assessed. When they move to a full-time course during the third quarter of the academic year they can be eligible for one third of the grants for living costs and loans for living costs for which they are assessed.

## **11 STUDENTS WHO HAVE BEEN IN RECEIPT OF A POST-COMPULSORY EDUCATION AWARDS**

Students who have been receiving discretionary funds under the provisions in the Local Education Authority (Post-Compulsory Education Awards) Regulations 1999, as amended (the "PCEA Regulations"), who are now eligible for the part-time student support package under the Education (Student Support) (Wales) Regulations 2017 are no longer be eligible to receive discretionary funding from their Local Authority under the PCEA Regulations. The PCEA Regulations provide that students who are eligible for funding by virtue of regulations made under section 22 of the Teaching and Higher Education Act 1998 cannot be eligible for post-compulsory education awards. As the fee grant and course grant are paid pursuant to regulations made under Section 22 of the Teaching and Higher Education Act, part-time students who are eligible for support under the Education (Student Support) (Wales) Regulations 2017 are excluded from eligibility for discretionary funding under the PCEA Regulations.

NOTE: Students who are not eligible for support for part-time or full-time study under the Education (Student Support) (Wales) Regulations 2017 may still be eligible for discretionary funding under the PCEA Regulations.

## **12 STUDENTS WHO HAVE BEEN IN RECEIPT OF A POST-COMPULSORY EDUCATION AWARDS**

Part-time students are eligible for a maximum of eight years of support (where the course started before 1 September 2014) or sixteen years of support (where the course starts on or after 1 September 2014). If they choose to apply for part-time support in a year in which they repeat part of their course, the amount of time that they are expected to complete the course in will be assessed. If, taking into account the period of repeat study, they are still on track to complete the course in not more than twice (where the course started before 1 September 2014) or four times (where the course starts on or after 1 September 2014) the period ordinarily required to complete the full-time equivalent course (see regulation 83(5)), they can be considered for support for the academic year in which they repeat. The amount of time in which the student is expected to complete their course is assessed every time the student makes an application for support for a year of his course.

Examples

- A student who is undertaking a course that they started before 1 September 2014 and would take 3 years to complete if studied full-time, must still be able to complete the course in no longer than twice this amount of time, i.e. 6 years, when studied on a part-time basis. So in this case any repeat years of study can only be funded if the course can still be completed in 6 years (Regulation 84(5) refers).
- A student who is undertaking a course that they started on or after 1 September 2014 and would take 4 years to complete if studied full-time must still be able to complete the course in no longer than four times this amount of time i.e. 16 years when studied on a part-time basis. In this case any repeat years of study can only be funded if the course can still be completed in 16 years. If it is clear that a student who has to repeat part of his course will be unable to complete the course within four times the period ordinarily required to complete the full-time equivalent course even if the student increase their intensity of study, they will cease to be eligible for support (Regulation 84(5) refers).

It should be noted that a student will cease to be eligible for support if it becomes impossible for him to complete the course within twice the period ordinarily required to complete the full-time equivalent (where the course started before 1 September 2014) or four times the period ordinarily required to complete the full-time equivalent (where the course started on or after 1 September 2014).

### **13 SPECIFICALLY DESIGNATING COURSES AT PRIVATE INSTITUTIONS**

Courses are automatically designated for part-time support if they meet the criteria set out in regulation 83(1) of the Regulations. Courses provided by privately funded HEPs or which otherwise do not meet the criteria must be specifically designated in order for financial support to be available to students undertaking those courses. Regulation 83(6) gives Welsh Ministers the power to specifically designate courses that do not meet the criteria set out in Regulation 83(1). Institutions established in Wales and elsewhere in the UK that wish to have their courses specifically designated must apply to the Welsh Government. Since January 2016 any institution wishing to apply for a new course designation must meet criteria which include having charitable status.

Further information can be obtained by email to: [studentfinancedivision@wales.gsi.gov.uk](mailto:studentfinancedivision@wales.gsi.gov.uk)

A complete and up to date list of specifically designated courses can be accessed on the [Student Finance Wales](http://www.studentfinancewales.co.uk/practitioners/policy-information/designated-courses.aspx) website. <http://www.studentfinancewales.co.uk/practitioners/policy-information/designated-courses.aspx>

### **14 OVERPAYMENTS**

In the event that a part-time student receives an overpayment of part-time grant, Welsh Ministers may, at their discretion, recover an overpayment made against any grant payable in any academic year.

### **15 STUDENTS ON DISTANCE LEARNING COURSES (INCLUDING FULL-TIME DISTANCE LEARNING COURSES THAT STARTED BEFORE 1 SEPTEMBER 2012)**

Students undertaking designated part-time courses through distance learning are eligible for part-time fee support and course grant and, where applicable, DSAs - provided they meet the eligibility criteria described. For a student to get a fee grant and a course grant, they must be considered to be undertaking the course in Wales on the first day of the first academic year of the course, and must be considered to be undertaking the course in the UK Please also see section 8 above.

Students undertaking designated full-time courses through distance learning which the student started before 1 September 2012 (regulation 64) are eligible for the part-time grants at the rate payable to those studying at 75% or more of the equivalent full-time course – see Part 11 of the 2017 Regulations. (For support for full-time distance learning courses which a student starts on or after 1 September 2012, please see the ‘Assessing Eligibility Guidance’ chapter for AY 2017/18.)

Full-time distance learners who started a course before 1 September 2012 are entitled to the part-time support package; this includes the course grant of £1,155 for books, travel and other expenditure in connection with the distance learning course. The amount of support available for the fee grant is £1,025 at the maximum intensity rate. Unlike part-time there are no variations of fee grant due to the intensity rate. The taper system will operate as follows:

- A student with relevant income of less than £16,865 would receive both the full fee and course grant available under Regulation 68 (1) and Regulation 69;
- A student with relevant income level of £16,865 would receive a reduction of £50 on the maximum amount of fee grant available to him under Regulation 68(1). He would be eligible to receive the full course grant;
- A student with relevant income of more than £16,865 and up to £25,435 will receive a partial fee grant and, if eligible, a full course grant. The fee grant taper is set at £1 in every £9.26.
- A student with relevant income of exactly £25,435 will receive a fee grant of £50 and, if the student is eligible, a full course grant.
- A student with a relevant income of over £25,435 up to £26,095 will receive no fee grant, but, if eligible, the full course grant of £1,155.
- Thereafter, as the student’s income increases over £26,095 the amount of award will reduce until eventually it will be exhausted. The taper is set at £1 in every £1.886. This means that a student with a relevant income level of £26,095 or more but less than £28,180 will be entitled to a partial course grant.
- A student with an income level of exactly £28,180 will be entitled to a course grant of £50. No fee grant will be payable.
- A student with a relevant income level of more than £28,180 will not receive any support.

Full-time distance learning students who start a course before 1 September 2012 are not eligible for support if they have undertaken one or more distance learning courses for eight academic years in aggregate and received for each of those years a loan or grant.

## 16 OPEN UNIVERSITY

Since AY 2014/15, the Open University administers applications for support from its own and part-time students, where the student is continuing on a course that they started **before** 1 September 2014. SFW will administer the applications of Open University students who start a course on or after 1 September 2014. If SFW receives an application from a part-time Open University student who is continuing on a course that they started before 1 September 2014, SFW should refer those students to the Open University. The contact number is 0300 303 5303.

E-mail address: [financial-support@open.ac.uk](mailto:financial-support@open.ac.uk)

## 17 DISABLED STUDENTS' ALLOWANCES

Applications for Disabled Students' Allowances from part-time students should be processed separately to those for part-time grants. Guidance on administering DSAs can be found in the SFW guidance chapter 'Disabled Students' Allowances'. Students who have applied for DSAs before their application for part-time grants will already exist on the system. SFW may have already received sufficient information on a student's DSA form(s) to establish their eligibility for part-time grant support. However, the student's application for part-time course grant and tuition fee support must be processed in the usual way. The Open University will continue to process its own DSA applications.

### ANNEX A

Date	Updates
XX May 17 (v1.0)	First version published

### Annex B

#### ENQUIRIES

If you have any queries on this guidance, please contact:

Higher Education Division

Welsh Government

E-mail: [studentfinancedivision@wales.gsi.gov.uk](mailto:studentfinancedivision@wales.gsi.gov.uk)