

# Education Maintenance Allowance

## Application Form for **EMA** in 2009/10

student finance wales



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

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

# It's time to apply for EMA for academic year 2009/10

## Applying is as easy as 1, 2, 3!

### 1 Complete the form



#### Why should I apply?

You can use this form to apply for EMA for 2009/10 if you intend to study at a school or college in Wales from September 2009.

Even if you're not sure if you will start a course, or where you will study, you can still apply.


#### Which sections should I complete?


All students must complete Sections A to H.

Depending on your answers in Section E you may need to ask your parent(s)/guardian(s) to complete Sections I and J.

This form appears in English and Welsh language but you only need to complete and return one version.

#### Can I get help to complete the form?

Yes. We have provided some guidance notes to help you with any difficult questions. You should refer to the guidance notes each time you see this icon. 

You will need to provide evidence to support your application. Any evidence required is highlighted by this icon. 

Information about the evidence required can be found in the guidance notes.

If you need any further help to answer the questions, please call us on 0845 602 8845.

### 2 Return the Form



#### When should I send you my completed form?

**Straight away!** To make sure that your EMA entitlement is agreed and in place well in advance of your first 2009/10 term you should return your form to us before June 2009. It's never too early to apply but it can be too late!

#### What happens if I send my form late?

If your form is not received within 8 weeks of starting your course you may lose out on backdated EMA payments. At the very latest, application forms must be received by 31 August 2010.

#### What about postage?

We recommend that you get proof of postage for this form by using a recorded delivery service or by getting a certificate of postage from the post office, for example. This is because any delay in receiving your application form could delay the start of your payments.

#### How do I know if you got my form?

We will confirm that we have received your application by sending you an Acknowledgement Letter. If you do not receive this letter two weeks after sending your form, please call us.

### 3 Receive your Award letter



#### What will my Award letter say?

Your Award letter will tell you how much your weekly EMA allowance is for academic year 2009/10 and when to expect your fortnightly payments.

#### Do I need to do anything with my Award letter?

No. But your school or college may ask to see your Award letter when you are signing your Learning Agreement for 2009/10.

For further information about Learning Agreements please see the guidance notes.

INTERNAL REFERENCE NUMBER: (For internal use only)

## SECTION A - YOUR PERSONAL DETAILS

If you are an existing EMA student, please provide your Customer Reference Number:

**Q1.**

Title

Mr

☐

Mrs

☐

Miss

☐

Other

First name(s)

Surname/Family name

Sex

Male

☐

Female

☐

Date of birth



DAY



MONTH



YEAR





In which town or city were you born?

### Security Details

**Q2a.**

Please provide a 'Secret Answer'.

**It is important you make your Secret Answer easy to remember as we will ask you to confirm this whenever you call us.**

**Q2b.**

Please provide a 'hint' question to remind you of your Secret Answer.

For example, if you chose 'Superman' as your Secret Answer then your 'hint' question could be 'What is the name of my favourite superhero?'

**If you ever forget your Secret Answer we will ask you this 'hint' question to help you remember it.**

**Q3.**

Home address







Postcode

Home telephone number

Mobile telephone number

Email address

## SECTION B - YOUR SCHOOL OR COLLEGE DETAILS

Please enter the details of the school or college where you intend to study from 1 September 2009. If you intend to study at more than one school or college, please enter the name of the place where you will spend most of your time.

If you are unsure where you will be studying from September 2009, please enter the details of the school or college you are currently attending. As soon as you know where you will be studying, you should call us so we can update your application.

Name of school or college	<input type="text"/>
Campus	<input type="text"/>
Street	<input type="text"/>
Town/city	<input type="text"/>
County	<input type="text"/>
Postcode	<input type="text"/>













## SECTION C - YOUR NATIONALITY DETAILS

**Q1.** Are you a **UK National**?

Yes ☐  No ☐

if 'Yes' go to **Section D**

**Q2.** Please indicate the nationality category that applies to you by ticking **one** box below:

- a. Are you an EU national? ☐ 
- b. Are you an EEA or Swiss national who is working, has worked or is looking for work in the UK? ☐ 
- c. Are you the husband, wife, civil partner, parent, step-parent, child, step-child or civil partner child of an EEA national who is working, has worked or is looking for work in the UK? ☐ 
- d. Are you the husband, wife or civil partner of a Swiss national who is working, has worked or is looking for work in the UK? ☐ 
- e. Are you the child, step-child or civil partner child of a Swiss national? ☐ 
- f. Are either of your parents a Turkish national who is currently resident in the UK and Islands and who is working or has worked in the UK? ☐ 
- g. Do you have 'Settled Status' or have you been granted 'Indefinite Leave to Enter' or 'Indefinite Leave to Remain' in the UK? ☐ 
- h. Have you been granted 'Refugee Status' by the UK government? ☐ 
- i. Are you the husband, wife, civil partner, child, step-child or civil partner child of a person who has been granted 'Refugee Status' by the UK government? ☐ 
- j. Have you been granted 'Leave to Enter or Remain' in the UK? ☐ 
- k. Are you the husband, wife, civil partner, child, step-child or civil partner child of person who has been granted 'Leave to Enter or Remain' in the UK? ☐ 
- l. None of the above. ☐ 

# SECTION D - YOUR RESIDENCY DETAILS

- Q1a.** Have you been ordinarily resident in the UK for three years prior to 1 September 2009? Yes ☐ No ☐ if 'Yes' go to Section E
- b.** Have you been ordinarily resident in the EU/EEA or Switzerland for three years prior to 1 September 2009? Yes ☐ No ☐ if 'Yes' go to Section E
- c.** If you have ticked 'No' to Q1a and b, please give details of your residence for the three years before 1 September 2009.

Full address

From  
DAY MONTH YEAR  
    
To  
DAY MONTH YEAR

Why were you there?

From  
DAY MONTH YEAR  
    
To  
DAY MONTH YEAR

From  
DAY MONTH YEAR  
    
To  
DAY MONTH YEAR

## SECTION E - YOUR INDEPENDENCE DETAILS

This section helps to decide whether you are a dependent or an independent student, and therefore, whose income needs to be taken into account when assessing your entitlement to financial support.

If you answer 'Yes' to **ANY** of the questions below you may be considered independent.  
If you answer 'No' to **ALL** of the questions below you are considered dependent.

- Q1.** Are you estranged from your parent(s)/guardian(s)? ☐n Yes ☐ No ☐ if 'Yes' go to Q3
- Q2.** Are you living under Local Authority care?  
(for example, with foster parents) Yes ☐e No ☐
- Q3.** Do you receive Income Support or Income Based  
Employment and Support Allowance in your own name? Yes ☐e No ☐
- Q4.** Are you responsible for a child of your own? Yes ☐e No ☐
- Q5.** Are you currently in custody at a Young  
Offender's Institution? Yes ☐e No ☐

## SECTION F - YOUR BANK OR BUILDING SOCIETY ACCOUNT DETAILS

- You must provide us with details of an account that accepts direct credits.
- Enter the full name of the account holder, as it is written on your bank or building society statement or card.
- You can find your sort-code and account number on your bank or building society statements.
- Your building society roll number can contain up to 18 letters and numbers, for example, JOHNSO12345678. Some building societies ask you to complete this field to let them make automatic payments into your account. If you are not sure of your roll number ask your building society for advice.
- If you do not complete this section correctly, your EMA award may be delayed.

If you have any exceptional circumstances which prevent you from opening a bank or building society account in your own name please tick here. ☐

Name of Account Holder

Name of Bank or Building Society

Sort Code

  -   -  

Account Number


Building Society Roll Number  
(if applicable)

## SECTION G - CONSENT TO SHARE

The data you provide on this form will be provided to the Welsh Assembly Government, Student Loans Company (SLC) or any other institutions used by the Welsh Assembly Government for the purposes of administering EMA to enable them to inform you of other student funding products which may be available and for marketing purposes such as market research.

If you **do not** consent to your data being used as described above tick here. ☐

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

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

- I consent to the EMA Wales Customer Services Team providing details of the progress of my application and award to the person named as Person 1 in Section I of this application form.

Yes ☐ No ☐

and, if appropriate

- I consent to the EMA Wales Customer Services Team providing details of the progress of my application and award to the person named as Person 2 in Section I of this application form.

Yes ☐ No ☐

## SECTION H - STUDENT DECLARATION

**Please read the following declaration. We will not be able to process your application for EMA unless you sign and date this declaration.**

Before signing and returning the completed form, you should read the Data Protection Statement within the EMA guidance notes that accompany this form. This statement sets out who will use the information provided on this application form and what they will use it for.

- I confirm that the information I have given on this form is correct and complete to the best of my knowledge and belief.
- I confirm that I have submitted supporting documentation in accordance with the guidance notes.
- I understand that any attempt to dishonestly obtain EMA shall be treated as fraud and may result in criminal and/or civil proceedings against me.

Student's full name

(in BLOCK CAPITALS):

Student's signature:

**X**

Date: 

DAY	MONTH	YEAR
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

### Sections you now need to complete:

#### Dependent Student

If you are a dependent student please pass this application form on to your parent(s)/guardian(s) so they can complete Sections I and J.

#### Independent Student

If you have answered 'Yes' to Q1 and 'No' to Q3 in Section E, you and your partner (if applicable) must complete Sections I and J.

#### Independent Student

For all other independent students, you have already completed the form. Please turn to page 11.

## SECTION I - YOUR HOUSEHOLD'S FINANCIAL DETAILS

This section should be completed by:


- the student's parent(s)/guardian(s) if the student is dependent.
- the student and their wife, husband, civil partner or partner (if applicable) if the student is:
  - estranged from their parent(s)/guardian(s) **and**
  - NOT living under Local Authority care **and**
  - NOT in receipt of Income Support or Income Based Employment and Support Allowance.


You must answer every question, entering the amount of income received. If you did not earn/receive any of the income types, you must enter £0.00 on the application form.

It is essential that you provide accurate and complete income details. If you do not, it may prevent the student from receiving their full EMA entitlement.

	Person 1 	Person 2
<b>Q1.</b> Relationship to applicant	<input type="text"/>	<input type="text"/>
First name	<input type="text"/>	<input type="text"/>
Surname/Family name	<input type="text"/>	<input type="text"/>

### Benefit Income

**Q2.** If either Person 1 or Person 2 is in receipt of Income Support or Income Based Employment and Support Allowance tick here: ☐  if ticked, go straight to Section J





**Q3.** Has your household been issued with a Tax Credit Award Notification TC602(E) for the financial year 2008-09? Yes ☐  No ☐

If 'Yes', enter your total annual household income as it appears on your Tax Credit Award Notification TC602(E)

£

### Employment Income

**Q4.** Please provide information for financial year 2008-09:

	Person 1	Person 2
Salaries and Wages 	£ <input type="text"/>	£ <input type="text"/>
Self-Employment Income 	£ <input type="text"/>	£ <input type="text"/>
Taxable Social Security Benefits 	£ <input type="text"/>	£ <input type="text"/>
Other Income 		
<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

**Q5a.** What is your total annual income? £

**b.** What is your total annual household income? £





# SECTION J - DECLARATION FOR PERSON(S) NAMED IN SECTION I

**Please read the following declaration. We will not be able to process this application for EMA unless you sign and date this declaration.**

Before signing and returning the completed form, you should read the Data Protection Statement within the EMA guidance notes that accompany this form. This statement sets out who will use the information provided on this application form and what they will use it for.

- I confirm that the information I have given on this form is correct and complete to the best of my knowledge and belief.
- I understand that any attempt to dishonestly obtain EMA shall be treated as fraud and may result in criminal and/or civil proceedings against me.

Person 1	Person 2
<p>Your full name (in BLOCK CAPITALS):</p> <input type="text"/>	<p>Your full name (in BLOCK CAPITALS):</p> <input type="text"/>
<p>Your signature:</p> <div>  <input type="text"/> </div>	<p>Your signature:</p> <div>  <input type="text"/> </div>
<p>Date:</p> <div> <div>DAY</div> <input type="text"/> <input type="text"/> <div>MONTH</div> <input type="text"/> <input type="text"/> <div>YEAR</div> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> </div>	<p>Date:</p> <div> <div>DAY</div> <input type="text"/> <input type="text"/> <div>MONTH</div> <input type="text"/> <input type="text"/> <div>YEAR</div> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> </div>



## EQUAL OPPORTUNITIES MONITORING VOLUNTARY QUESTIONNAIRE

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

**Q1.** Do you consider yourself to have a disability? ☐ Yes ☐ No

**Q2.** What do you consider your nationality identity to be?  
(Choose as many or as few as apply).

- ☐ Welsh
- ☐ Irish
- ☐ English
- ☐ British
- ☐ Scottish
- ☐ Other

**Q3.** Choose **ONE** section from A to E, then tick the appropriate box to indicate your ethnic group.

**A** White

- ☐ British
- ☐ Any other white background

**D** Black or Black British

- ☐ Caribbean
- ☐ African
- ☐ Any other black background

**B** Mixed

- ☐ White and Black Caribbean
- ☐ White and Black African
- ☐ White and Asian
- ☐ Any other mixed background

**E** Chinese or other ethnic group

- ☐ Chinese
- ☐ Any other


**C** Asian or Asian British

- ☐ Indian
- ☐ Pakistani
- ☐ Bangladeshi
- ☐ Any other Asian background

**PLEASE RETURN THIS COMPLETED QUESTIONNAIRE WITH YOUR APPLICATION FORM**



## Student Checklist

### Have you:

- ☐ Completed and checked all the questions in Sections A to H?
- ☐ Provided the original documentary evidence requested in the guidance notes? 
- ☐ Signed and dated the Student Declaration?
- ☐ Indicated whether you consent to the EMA Wales Customer Services Team providing details of the progress of your application and award to Person 1 and/or Person 2?

## Checklist for Person 1 & 2:

### Have you:

- ☐ Completed and checked Sections I and J?
- ☐ Provided the correct total household income?
- ☐ Attached your household's Tax Credit Award Notification TC602(E) (if applicable)? 
- ☐ Attached evidence to support the statement of household income, if you are not in receipt of a Tax Credit Award Notification TC602(E)? 
- ☐ Signed and dated the Declaration(s)?

## One last reminder

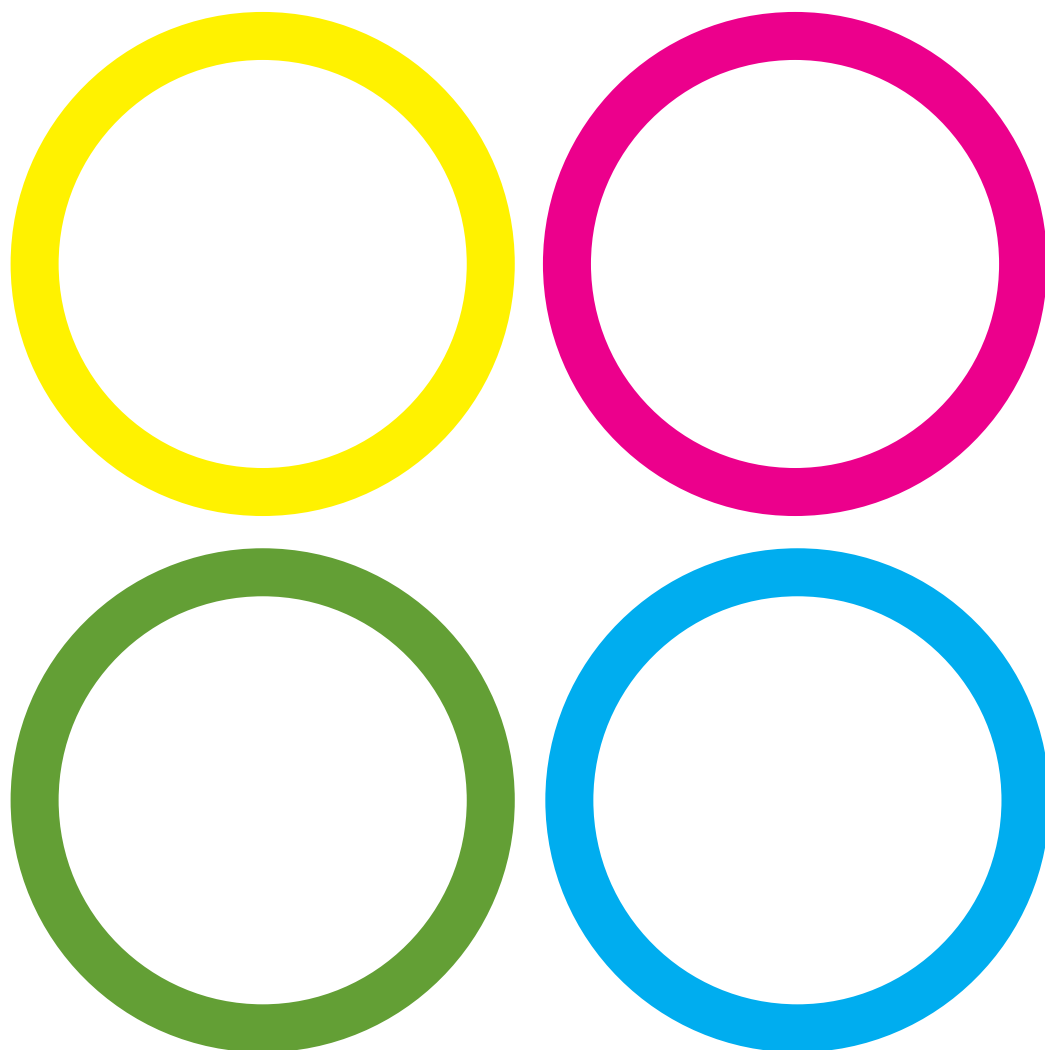
- Any missing information or documentation may result in late payment of your EMA award. However, please do not delay sending in your application form if you are having difficulty providing this evidence.
- **Your application form should be returned to us as soon as possible. If it is not received within 8 weeks of starting your course you may lose out on backdated EMA payments.** At the very latest, application forms must be received by 31 August 2010. We recommend that you obtain proof of postage for this form by using a recorded delivery service or by getting a certificate of postage from the post office. This is because any delay in receiving your application form could delay the start of your payments.

Send your **completed form** and **original supporting evidence**, using the envelope provided to:

**EMA Wales Customer Services**  
**ADM 3888**  
**Cardiff**  
**CF11 0ZY**

If you have not received any acknowledgement from us two weeks after sending your application form, or you have any other queries, please contact us on 0845 602 8845.

If you have hearing difficulties, and wish to speak to an advisor using a minicom device, please contact us on 0845 603 1693.



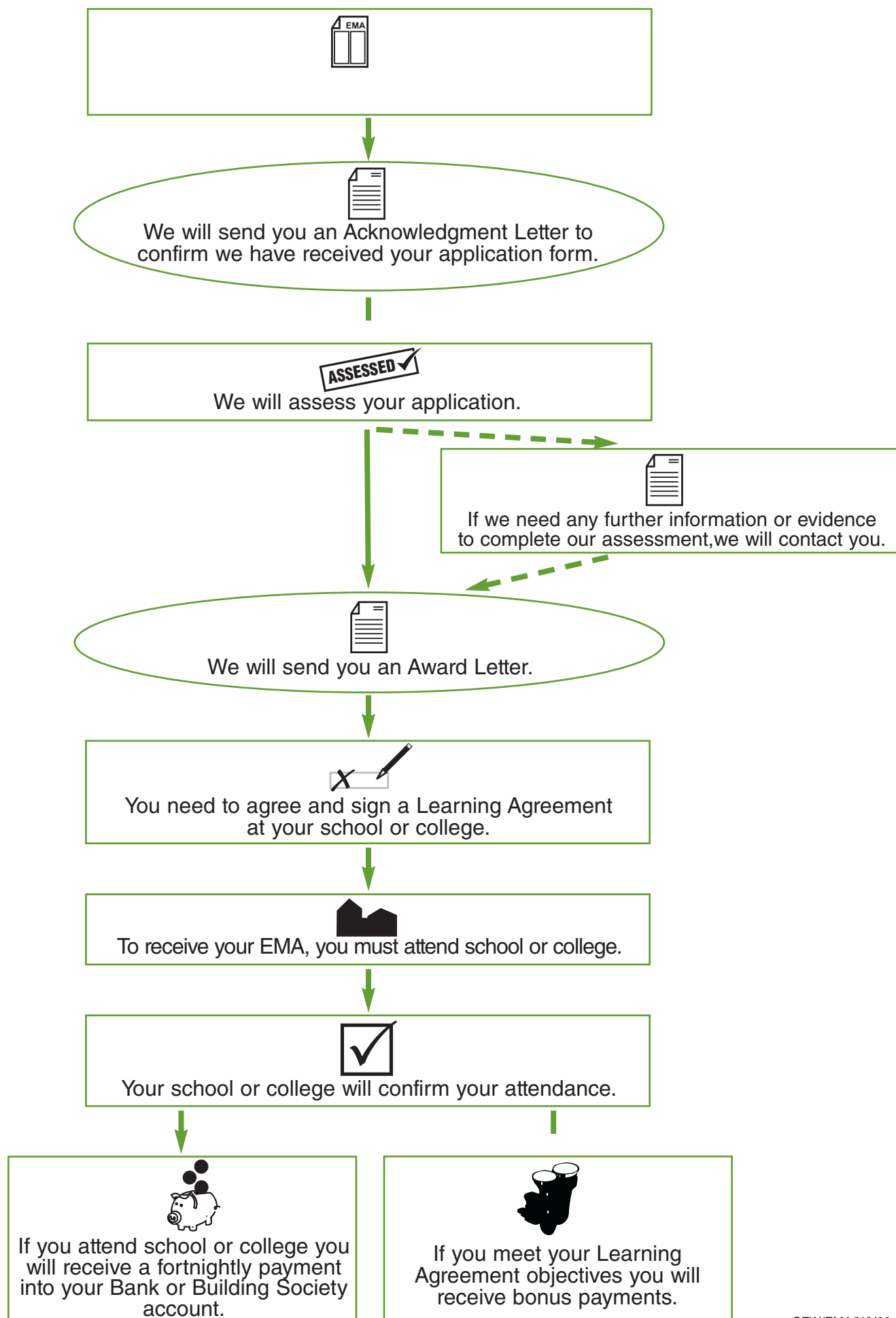
Guidance Notes for  
**EMA**  
in 2009/10

student finance **wales**



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

## WHAT DO I NEED TO DO TO GET EMA?



## WHAT IS EMA?

Education Maintenance Allowance (EMA) is a payment of £10, £20 or £30 per week, paid fortnightly to eligible students, which can help with the cost of further education. In addition, students accepted onto the EMA scheme may receive bonus payments of £100 if the student meets their school or college attendance and performance objectives.



## HOW CAN I GET IT?

You may be eligible to receive EMA if you:

- Continue, or start, at a participating school or college in Wales in academic year 2009/10 (1 September 2009 - 31 August 2010);
- Are aged between 16 and 18\* on 31 August 2009;
- Attend an eligible full-time course at school or a minimum of 12 guided hours at college. Eligible courses include academic and vocational courses up to, and including, Level 3 (e.g. GSCE, A-Level, BTEC, NVQ and Basic Skills) and must last at least 10 weeks;
- Meet the residence and nationality criteria set out for the EMA Wales scheme;
- Will not be in receipt of ALG FE for academic year 2009/10; and
- Are from a household that has an annual income of £32,400 or less.

**PLEASE NOTE:** Higher Education courses and work-based learning programmes funded by the Welsh Assembly Government are NOT eligible for EMA funding.

If you meet all of the above eligibility criteria you should complete the EMA Wales application form and return it to us in the envelope provided. If you lose your application form you can download another copy from [www.studentfinancewales.co.uk/EMA](http://www.studentfinancewales.co.uk/EMA), pick up another copy at your school or college, or request another copy by calling us on 0845 602 8845.



We will confirm that we have received your application by sending you an Acknowledgement Letter. If you do not receive this letter two weeks after sending your form, please call us.



## HOW MUCH CAN I GET?

Depending on your age you may qualify for EMA for a maximum of three years, though you must apply each year.

The maximum weekly EMA entitlement is £30 which is paid fortnightly. To decide how much you are entitled to we need to look at your household's annual income. The table below shows how much you may be entitled to receive:

Annual Household Income	Weekly EMA Entitlement	Fortnightly EMA Payment
Up to £21,885	£30	£60
£21,886 - £26,840	£20	£40
£26,841 - £32,400	£10	£20
£32,401 and above	£0	£0

As well as a weekly allowance, you may also receive bonus payments of £100.



We will confirm your eligibility and entitlement as soon as our assessment is complete. If we need any further information or evidence to complete our assessment, we will contact you.

\*entitlement may be extended to 19 year olds if they have not already received 3 years of EMA.



## WHEN CAN I GET IT?

If you qualify for EMA, you must sign both parts of the Learning Agreement with a representative at your school or college once you start your course. This Learning Agreement covers all the attendance and performance rules set out by your school or college which you must meet in order to receive your weekly allowance as well as bonuses.

Bonus payments are normally made in January and July each year to those who meet their Learning Agreement objectives. A further bonus payment may be paid to those who return for a second or third year.

Please note that any payments you are entitled to are for academic year 2009/10 only.



**Your application form should be returned to us as soon as possible. If it is not received within 8 weeks of starting your course** you may lose out on backdated EMA payments. At the very latest, application forms must be returned by 31 August 2010.

## WHO CAN I CONTACT WITH FURTHER QUESTIONS?

If you have any queries, please talk to your school or college. If your school or college is unable to answer your query, you can find out more information about EMA at:

- [www.studentfinancewales.co.uk/EMA](http://www.studentfinancewales.co.uk/EMA); or
- by emailing [EMAWales@slc.co.uk](mailto:EMAWales@slc.co.uk); or
- by calling the EMA Wales Customer Services Team on 0845 602 8845.

If you have hearing difficulties, and wish to speak to an advisor using a minicom device, please contact us on 0845 603 1693.

## HOW DO I MAKE A COMPLAINT?

Problems can usually be settled quickly and easily by simply telephoning the department you have been dealing with, explaining your problem and asking to have it resolved. If this does not resolve your problem to your satisfaction, or you believe that this approach may be inappropriate, you can make a complaint in one of the following ways:

- By writing to:
 

Customer Assistance  
 Student Loans Company Limited  
 100 Bothwell Street  
 Glasgow  
 G2 7JD
- By telephoning the department you last dealt with and asking for a telephone complaint to be logged
- By emailing [customer\\_complaints@slc.co.uk](mailto:customer_complaints@slc.co.uk)


Please quote your Customer Reference Number (if you have one) in all correspondence.

If you feel that you have suffered as a result of maladministration or a service failure in relation to your application or assessment, you have the right to make a complaint directly to the Public Services Ombudsman for Wales.



## NOTES FOR COMPLETING THE 2009/10 APPLICATION FORM

You should use these notes when completing the application form. The notes are split into sections in the same way as the questions, to make it easier for you to find the right information. The notes describe what you need to tell us and also give details of any documentary evidence that you or your parent(s)/guardian(s) or partner must send with the form.

 **IMPORTANT:** Any evidence that you are required to provide is outlined in these notes and is marked with this icon.

**PLEASE NOTE:** We do not accept photocopied documentary evidence. If you return photocopies it will cause a delay with processing your application. We will return original documents to you as soon as possible.

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### SECTION A YOUR PERSONAL DETAILS

**Q.1** You must provide proof of your age and identity by sending your birth or adoption certificate with your application form. If your name is different on your birth or adoption certificate you must provide proof of your name change. This can be in the form of a deed poll or marriage certificate.



**Q.3** You must provide proof of your household's address. This can be a Tax Credit Award Notification TC602(E) or a utility bill (gas, electricity, council tax or telephone), dated within the last three months. If you change your address during the academic year, you must still be living permanently in the UK and still attending a school or college in Wales to continue receiving EMA.



For more information about the Tax Credit Award Notification TC602(E), please refer to Section I of these notes.

## SECTION C

### YOUR NATIONALITY DETAILS

To be eligible for EMA, you must meet the residence and nationality criteria set out for the EMA Wales scheme. If you have any queries regarding residence and nationality, you should contact the EMA Wales Customer Services Team.

**Member countries of the EU are:** Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden and United Kingdom.

**Member countries of the EEA are:** all of the above, Iceland, Liechtenstein and Norway.

**Q.1** You must send your passport or birth certificate as evidence of your nationality.


**e** If you were born outside the UK and have a British birth certificate issued by a British Consulate, send this or a letter or other document instead of your passport.

**Q.2** If you tick **a - f** you must send:

- **your own passport or national identity card** and depending on your nationality category, **originals** of the following:

Nationality Category	Evidence Required <b>e</b>
<b>b</b> EEA or Swiss National who is working, has worked or is looking for work in the UK.	<ul style="list-style-type: none"> <li>• If you are working in the UK - a P60 or letter from your employer on headed paper.</li> <li>• If you are self-employed in the UK - audited accounts, tax returns or details of your income.</li> <li>• If you are looking for work in the UK - a P60, previous P45, a letter from your previous employer on headed paper, audited accounts, tax returns or details of your income and evidence which shows that you are actively seeking employment in the UK.</li> <li>• If you have previously worked in the UK - a P45, P60 or a letter from your previous employer on headed paper.</li> </ul>
<b>c</b> Husband, wife, civil partner, child, step-child or civil partner child of an EEA national who is working, has worked or is looking for work in the UK.  <b>d</b> Husband, wife, civil partner of a Swiss national who is working, has worked or is looking for work in the UK.	Your relation's passport or national identity card; proof of your relationship with that person and: <ul style="list-style-type: none"> <li>• If they are working in the UK - their P60 or a letter from their employer on headed paper.</li> <li>• If they are self-employed in the UK - their audited accounts, tax returns or details of their income.</li> <li>• If they are looking for work in the UK - their P60, a previous P45, a letter from their previous employer on headed paper, their audited accounts, tax returns or details of their income.</li> <li>• If they have previously worked in the UK - their P45, P60 or a letter from their previous employer on headed paper.</li> </ul>
<b>e</b> Child, step-child or civil partner child of a Swiss national.	Your parent, step-parent or parent's civil partner's passport or nationality identity card; and proof of your relationship with them.
<b>f</b> Your parent is a Turkish national who is currently resident in the UK and who is working or has worked in the UK.	Your parent's passport or national identity card; proof of your relationship with that person and: <ul style="list-style-type: none"> <li>• If they are working in the UK - their P60 or a letter from their employer on headed paper.</li> <li>• If they are self-employed in the UK - their audited accounts, tax returns or details of their income.</li> <li>• If they have previously worked in the UK - their P45, P60 or a letter from their previous employer on headed paper.</li> </ul>

If you ticked **g - k** depending on your nationality category you must send **originals** of the following:

Nationality Category & Information	Evidence Required 
<b>g</b> Settled Status, Indefinite Leave to Enter or Indefinite Leave to Remain in the UK - This means you can live in the UK permanently without the Home Office placing any restrictions on how long you remain.	Your passport confirming immigration status <b>or</b> a letter from the Home Office confirming immigration status.
<b>h</b> Refugee - You must have lived in the UK since Refugee Status was awarded.	Your immigration status document <b>and</b> Home Office letter.
<b>i</b> Husband, wife, civil partner, child, step-child or civil partner child of a person granted 'Refugee Status' by the UK government - You must have lived in the UK since refugee status was awarded.	Your relation's immigration status document, Home Office letter <b>and</b> proof of your relationship with that person at the time of their application to the Home Office.
<b>j</b> Granted 'Leave to Enter or Remain' in the UK.	Your immigration status document and Home Office letter.
<b>k</b> Husband, wife, civil partner, child, step child, civil partner child of a person granted Leave to Enter or Remain in the UK - 'Leave to Enter or Remain' covers: Humanitarian Protection, Discretionary Leave and Exceptional Leave to Enter or Remain.	Your relation's immigration status document, Home Office letter <b>and</b> proof of your relationship with that person at the time of their application to the Home Office.


- l** Contact the EMA Wales Customer Services Team to find out if you meet the residence and nationality criteria set out for the EMA Wales scheme.

## SECTION D YOUR RESIDENCY DETAILS

**Ordinarily resident** means that you normally and lawfully live in the UK, EU/EEA or Switzerland through choice. You should not mention any temporary absences from this area as this will not stop you from being classed as ordinarily resident. Please note, you must also be resident in the UK on the first day of your course to be eligible for EMA.

## SECTION E YOUR INDEPENDENCE DETAILS

- Q.1** Estranged from your parent(s)/guardian(s) means that you permanently have no contact with your parent(s)/guardian(s).  
If you have answered 'Yes' to Q1 and 'No' to Q3, you must complete Section I with your own financial details and your partner's (if applicable).

Independence Criteria	Evidence Required 
<b>Q.2</b> You are living under Local Authority care (for example, with foster parents)	A letter on headed paper from your Local Authority which must: - confirm you are living under their care or with foster parents; - confirm your current address; and - be signed by an authorised official from your Local Authority and include an official stamp.
<b>Q.3</b> You are in receipt of Income Support or Income Based Employment and Support Allowance	Your most recent Benefits statement, a Tax Credit Award Notification TC602(E) for 6 April 2008 to 5 April 2009 or a recent bank statement showing Benefit payments.
<b>Q.4</b> You are responsible for a child of your own	Your most recent Child Benefit statement or your child's birth certificate and confirmation of your current address.
<b>Q.5</b> You are currently in custody at a Young Offender's Institution	A letter on headed paper from your key worker which must: - confirm your period and place of detention; - confirm your nationality/residence details; - confirm that you consent to your key worker to act on your behalf for the purposes of EMA; - be signed by both you and your key worker.

## SECTION G CONSENT TO SHARE

If you agree to let us talk to your parent(s)/guardian(s) or partner, they must quote the unique Customer Reference Number that appears on all correspondence we send to you regarding your application. We will also ask them further questions about the details you supply on your application form as an extra security measure.

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## SECTION I YOUR HOUSEHOLD'S FINANCIAL DETAILS

This section should **not** be completed if you have stated in Section E that any of the following apply to you:

- **You are living under Local Authority care**
- **You are receiving Income Support or Income Based Employment and Support Allowance in your own name**
- **You have a child for which you are responsible**
- **You are a Youth Offender in Custody**

For more information, please see Section E of these guidance notes.

Do **NOT** include income for parents or step-parents who live permanently outside your household.

**Any attempt to dishonestly obtain EMA shall be treated as fraud and may result in criminal and/or civil proceedings.**

**Q.1** If you are completing this section with your own details, enter 'Student' in the Relationship to applicant field for Person 1.

**Q.2** If you are in receipt of Income Support or Income Based Employment and Support Allowance and your total household income is £0.00, you must provide a copy of your most recent Benefits Statement.

**Q.3** If your household receives Tax Credits, you will receive a letter from HM Revenue & Customs detailing your household income and your Tax Credit entitlement. This is called a Tax Credit Award Notification. For further information please see the example on the next page.

## TAX CREDIT AWARD NOTICE EXAMPLE

**HM Revenue & Customs**

105124:00000546:001

MR FRANK PEACH  
MRS PAULINE PEACH  
1 ANY STREET  
ANYTOWN  
ANYWHERE  
XX00 0XX

Helplines 08:00 to 20:00  
0845 300 3900  
Minicom/Textphone  
0845 300 3909

TAX CREDIT OFFICE  
PRESTON  
PR1 0SD  
Date 18 July 2008

**Final tax credits decision for 06/04/2008 to 05/04/2009**

MR FRANK PEACH  
MRS PAULINE PEACH

National Insurance number AB 34 56 78 D  
National Insurance number CD 55 56 66 B

**Summary**  
Tax credit for the period – see Part 2  
Child Tax Credit £2778.66  
Amounts still to be paid to you  
Child Tax Credit £0.00

**Part 1** shows the circumstances and income we have used to make our final decision. We expect you to check that they are correct and tell us if they are not.  
**Part 2** shows how we have used the information to calculate the amount of tax credits for the year.  
**Part 3** gives details of payments during the year.

**Why we are writing to you**  
We are making a final decision on the amount of tax credit due to you for the period 06/04/2007 to 05/04/2008 based on information we held.

**What to do now**  
Please check the details on this form and tell us if anything is wrong, missing or incomplete. If we do not hear from you we will assume the information we hold is correct and if we later find that you knew this information was incorrect or incomplete and did so you may be liable to a financial penalty and/or you may be prosecuted.

TC602(E) 3/2008 Page 1 of 4

Your name should be here.

This is the date for which tax credits have been awarded. We require you to submit the previous year's tax credit i.e. for academic year 2009/10 you need to submit Tax Credit Award Notification TC602(E) for 6 April 2008 to 5 April 2009.

This is your tax credit summary **NOT** your annual household income. Your annual household income is stated on page 2 of your Tax Credit Award Notification TC602(E).

This is where it will state which Tax Credit Award Notification version you have been issued with - **we only accept the E-version.**

Your annual household income is stated on page 2, please attach this to your application form along with page 1.

**Part 1 Personal circumstances**  
Your tax credits were based on your personal circumstances during the period shown on page 1. We hold the following details for the end of that period. Please check they were correct. If anything is wrong, missing or incomplete, please contact us.

**Claimants**  
Your tax credits are based on you being part of a couple. If you have separated, please tell us. You may be able to make a new claim to tax credits, either on your own or as part of a new couple.

**MR FRANK PEACH**  
You worked 33 hours a week.

**MRS PAULINE PEACH**  
You claimed tax credits jointly with the person named above.  
You worked 10 hours a week.

**Qualifying children and young people**  
2 aged between one and sixteen.

**Child care costs**  
You have no qualifying child care costs. If you start to pay for child care, and you qualify for Working Tax Credit you may be able to claim the child care element of Working Tax Credit. Contact us for details.

**Income**  
We have made a final decision on your award based on the following information about your income. Please check carefully and tell us if any of the figures are incorrect.

**Your income for the year 6 April 2008 to 5 April 2009**

<b>MR FRANK PEACH</b>		
Earnings as an employee	£16000.00	
Your total income		£16000.00
<b>MRS PAULINE PEACH</b>		
Earnings as an employee	£3000.00	
Your total income		£3000.00
<b>Total income for the year from 6 April 2008 to 5 April 2009</b>		<b>£19000.00</b>
<b>Your income for the year 6 April 2007 to 5 April 2008</b>		
Total income for the year from 6 April 2007 to 5 April 2008		£18000.00

**Your right to appeal**  
You have 30 days from the date of this notice to appeal. Any appeal must be in writing, but you may want to phone us first to see if we can reach an agreement without a formal appeal. You will still have the right to appeal if you do this.


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## SECTION I CONTINUED

**Q.4** You need to provide all the details of your household income, based on financial year 2008-09, that are necessary for the completion of an income assessment. All income must be stated as annual, pre-tax values.

You must also provide supporting evidence for all the household income recorded in this section. Where a P60 or an SA302 is requested, this must be the form from the end of the most recent financial year.

STANDARD INCOME TYPES		
Income Type	Description	Evidence Required 
<b>Salaries and Wages</b>	<p>This is the total taxable pay. It is the amount paid before any deductions are made for Income Tax or National Insurance contributions. It includes:</p> <ul style="list-style-type: none"> <li>- All income from employment.</li> <li>- Statutory Sick pay.</li> <li>- Performance Related pay.</li> <li>- Benefits/Payments in Kind.</li> <li>- Statutory Maternity pay.</li> <li>- Statutory Paternity pay.</li> <li>- Statutory Adoption pay.</li> <li>- Tips or gratuities.</li> <li>- Overtime payments.</li> </ul> <p><b>DO NOT INCLUDE</b> any Tax Credit or Working Tax Credit element of New Deal that you receive separately or as part of your wages. These credits do not count for EMA purposes.</p>	<p>P60, month 12 wage slip or week 50, 51 and 52 wage slips.</p> <p>P45s, if you have had more than one employer in the last financial year.</p> <p>P11D or P9D, if you receive benefits or payments in kind.</p>
<b>Self-Employment Income</b>	<p>This is the income and profit from self employment, either on your own or in a partnership, as it appears on your SA302 form.</p> <p>It includes:</p> <ul style="list-style-type: none"> <li>- Business rental income.</li> <li>- Any other income from the ownership of property.</li> </ul> <p>It does <b>not</b> include:</p> <ul style="list-style-type: none"> <li>- Gross contributions made to a personal pension scheme.</li> <li>- Any trading losses brought forward from previous years.</li> </ul>	<p>Most recent SA302. In the absence of an SA302 or Tax Credit Award Notification, an accountants letter on headed paper will be acceptable.</p>
<b>Taxable Social Security Benefits</b>	<p>Payments made to individuals under the Social Security system run by the JobCentre Plus or Pensions Office.</p> <p>Specifically:</p> <ul style="list-style-type: none"> <li>- Retirement Pension.</li> <li>- Widowed Parents Allowance.</li> <li>- Carer's Allowance.</li> <li>- Industrial Death Benefit.</li> <li>- Incapacity Benefit (after 28 weeks)*.</li> <li>- Contribution Based Employment and Support Allowance.</li> <li>- Bereavement Benefit.</li> <li>- Job Seekers Allowance.</li> </ul> <p><b>DO NOT INCLUDE</b> Income Support or Income Based Employment and Support Allowance. If you receive either of these please answer Q2.</p>	<p>A statement or record of paid taxable benefits. You can get this from your local JobCentre Plus or Social Security Office.</p>


\*Deduct the first 28 weeks of payments from the date you were first in receipt of Incapacity Benefit.



## SECTION I CONTINUED


The types of income in the following table are classed as 'Other Income'. If you received these types of income, you need to add up the total amount for each person, and then add the two totals together.

- If the total exceeds £300, you must enter details of your other income in the boxes provided.
- If the total does not exceed £300, you do not need to tell us about any of the income amounts.

OTHER INCOME TYPES		
Income Type	Description	Evidence Required 
<b>Savings and Investments</b>	<p>This is income you do not work to earn. This includes:</p> <ul style="list-style-type: none"> <li>- Interest on savings and investments from bank or building society accounts before tax is deducted. This includes any dividends received.</li> </ul> <p>This <b>does not</b> include tax-free accounts, such as TESSA's, PEP's or ISA's.</p>	Bank or building society statements. Annual statements of interest. Dividend vouchers.
<b>Trust Income</b>	<p>This is income, before tax is deducted, that is received from:</p> <ul style="list-style-type: none"> <li>- Trusts.</li> <li>- Settlements.</li> <li>- Transfers of Assets.</li> <li>- The value of the interest you or your partner has in the estate of a person who has died. This could be assets in the form of money, a trust or property.</li> </ul>	Annual statements or a Certificate of Trust from the trust administrator.
<b>Foreign Income</b>	<p>This is income received in the past year from any work undertaken abroad or any investments held abroad before tax. All amounts must be entered in pounds sterling. This income includes:</p> <ul style="list-style-type: none"> <li>- Dividends from shares held overseas.</li> <li>- Pensions and Social Security benefits received from overseas type of income received.</li> <li>- Income from land or property overseas (such as rent).</li> <li>- Any other income from overseas trusts, companies and other entities (such as gains from overseas life assurance/insurance policies, annuities or capital redemption policies).</li> </ul>	Foreign Tax Office evidence, Foreign Social Security, Foreign Pension certificate, or other income certificates or income statements.

Continued on the following page

## SECTION I CONTINUED

OTHER INCOME TYPES		
Income Type	Description	Evidence Required 
<b>Property Income (This is also known as Rental Income)</b>	This is income received from land or property that you own and/or that you lease out to another party. This does not include income covered by the Rent-a-Room scheme (if you let accommodation in your own house for £4,250 or less per year).	Rental book or bank statements.
<b>Pension Income</b>	This is income you received if you are of pensionable age. It includes: <ul style="list-style-type: none"> <li>- State Retirement Pension.</li> <li>- Statutory Pension Income.</li> <li>- Personal pension plans.</li> <li>- Retirements annuities.</li> </ul>	Annual Pension Statements, Pension Book, Pension P60 or certificate of pension paid.
<b>Notional Income</b>	This is income that is treated as received, even if it has not been physically received. This includes: <ul style="list-style-type: none"> <li>- Capital treated as Income - including dividends paid as shares as well as cash (stock dividends), and premiums for a grant of lease on a property that you own.</li> <li>- Trust Income treated as income of another person, such as interest over £100 on capital in a child's building society account.</li> <li>- Income you gave up or transferred to another person, including the selling of an occupational pension or the transfer of a bank account into someone else's name.</li> </ul>	We will accept your signature in Section J of the EMA Wales application form.

## DATA PROTECTION ACT

The information provided on this form will be used for the processing of the EMA application and any subsequent administration. To enable the application to be processed and administered, your information will be shared with the Student Loans Company (SLC) who administers the EMA Wales scheme. SLC is under a duty to protect public funds, and may also use this information to detect/prevent fraud. SLC may also share the information with other public bodies for this purpose. SLC may also retain your information to assist in the processing of any future application you may make for further education and/or higher education funding.