



# **GUIDANCE NOTES ON COMPLETING THE APPLICATION FORM**

## **EDUCATION MAINTENANCE ALLOWANCE ACADEMIC YEAR 2019/20**

*Please read carefully. Failure to complete the form properly could result in a delay to any award being made.*

# GUIDANCE FOR COMPLETING THE EMA APPLICATION FORM

## Section 1(A): STUDENT PERSONAL DETAILS

- Please provide your original Birth Certificate – unfortunately, we are unable to accept medical cards, baptism certificates or photocopies. If the Birth Certificate is unavailable, other forms of documentation may be required, ie Passport.
- Original documents will be returned as soon as possible.

## Section 1(B): PERSONAL NATIONALITY AND RESIDENCY DETAILS

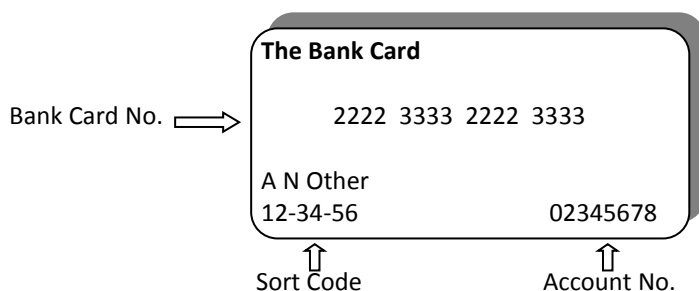
- To be eligible for an EMA, students must meet the nationality and residency requirements of the programme. In all cases students should provide evidence depending on their circumstances.
- More information about nationality and residency can be found in the EMA Guidance Document on the EMA website [www.emascotland.com](http://www.emascotland.com)
- If you have not been ordinarily resident in the UK for 3 years, you may still be considered for an EMA.
- If you have not been resident in the UK for 3 years you must provide evidence of your residency status.

## Section 2: LEARNING PROGRAMME/SCHOOL DETAILS

- The learning programme/school details relate to the establishment at which you intend to study during the period which you would receive any EMA payment(s) if eligible.
- For those studying at school and intend to study between two schools or school and college over the same period, enter details of the place at which you will spend the most time.
- To be eligible for an EMA you must be attending school and/or college for a minimum of 21 guided learning hours (timetabled hours including study periods) per week, or undertaking an Activity Agreement

## Section 3: BANK/BUILDING SOCIETY ACCOUNT

- The name of the person holding the account **MUST** be the EMA student only, except where the applicant has additional needs which makes this impractical.
- To receive an EMA payment, you must hold a bank/building society account which accepts payments by Bank Automated Credit System (BACS) Transfer. If unsure, please check with your bank/building society.
- Payments will normally be paid directly into your bank/building society account on a fortnightly cycle in arrears.
- Sort code – this is a 6 digit number.
- Account number – this is an 8 digit number.
- Please **do not** use the 16 digit number which appears across the middle of the card.



#### Section 4: FAMILY DETAILS

- Please tick the appropriate box which refers to your household.
- The term 'parent' as it appears can refer to your father, mother, carer, step-parent or parent's partner who lives in your home.
- Please include proof of guardianship, eg child benefit letter, if living with someone other than your mother or father.
- Please include proof of Lone Parent status, eg current Council Tax Bill.
- Please include any dependent children in the household other than the student applying.
- Acceptable documents include:
  - TCAN – Tax Credit Award Notice for 2019/2020
  - Child Benefit
  - SAAS or College Letter of Award
  - School/College or University Letter confirming enrolment of **other** dependent child/ren

#### Section 5(A): HOUSEHOLD INCOME

Please note additional documentation may be required to complete this application form.

- If a student is independent (receiving income support in their own right) or in the care of the Local Authority, Section 5 should **not be** completed.
- If your household has a Tax Credit Award Notice (TCAN) TC602 from HM Revenue and Customs (HMRC) for 2019/20, based on household income for 2018/19, the complete finalised form must be submitted along with your application form. You **do not** have to complete Section 5B or provide any other financial evidence.

Please note that your TCAN must be for **2019/2020** and show actual income figures. Estimated income figures are **not** acceptable.

NB – If your TCAN TC602 is not yet available, please still submit your application form with TCAN to follow.

#### Section 5(B): HOUSEHOLD INCOME

If no TCAN for **tax year** 2019/20 is available, details will have to be entered into the relevant boxes in Section 5B. The following documentation must be provided if applicable.

- **Job Centre Benefits**

If receiving benefits, please submit a P60U certificate, or alternatively take Part C (*available online or by calling the number on the front of the application*) to the Department of Work and Pensions (DWP) or Jobcentre Plus office to be completed.

**Helpline Numbers:**

Carers Allowance (Preston)	0345 608 4321
Child Benefit Helpline	0300 200 3100

**Please see HRMC – TCTM04402 for further details**

- **Earnings as an Employee**

A 2019 P60 confirming earnings from employment, or a valid week 52/month 12 payslip, providing these show year to date income.

If you made pension contributions to an HM Revenue & Customs approved pension scheme (other than through your employer), you should deduct the gross amount for year 2018/19 from the total household income. You must provide evidence from the pension fund scheme. If you made contributions through your employer, you do not have to deduct anything.

- **Income from Self-Employment**

If you are in self-employment (either on your own or in partnership), enter your profit:

- If you completed a Tax Return form SA200, your profit is the figure in box 3.10.
- If you completed a Tax Return form SA100, your profit is the figure in box 25 of the short return or box 71 of the full return.
- If you have more than one business, work out your total profit by adding together box 25 of the short return or box 71 of the full return from each of your tax returns.
- If self-employed, a Self-Assessment Tax Calculation (SA302) 2018/19 should be submitted. Alternatively, a completed Accountants Certificate should be submitted until a SA302 form is available. In this case, a provisional award will be made to allow time to obtain the SA302 form required.

- **Other Income**

In addition to social security benefits and earnings from your work, we also take into account any miscellaneous income in the year 6 April 2018 to 5 April 2019.

Enter the income you (and/or your partner) received, then round down the total to the nearest pound. For example, if your total was £134.76, then enter £134. ***Please see HMRC – TCTM04008 for further details***

**Do not** include the following:

- Maintenance received from a former partner
- Working Tax Credit and Child Tax Credit
- Student loans. You should also not deduct student loan repayments from your income.
- Other student grants such as those to meet the cost of tuition fees, child care, etc. ***Please see HMRC – TCTM04005 for further details***
- War pensions, or pensions or annuities payable under German or Austrian law to victims of Nazi persecution.
- Income your children may have had, unless it is taxable in your name or your partner's name.

- **UK Pensions**

Enter the amount of any State Pension you received, including

- The basic (or old age) pension
- The social security pension lump sum
- State earnings related pensions (SERPS)
- Graduated pension (graduated retirement benefit)
- Industrial Death Benefit
- Widow's Pension
- Widowed Mother's Allowance, Widowed Parent's Allowance
- Any increase for a dependent child
- Any incapacity addition or addition for a dependent adult
- Any increases paid by the Department for Work and Pensions or Department for Social Development to up rate a guaranteed minimum pension.

Do not include the Christmas Bonus and the Winter Fuel payment.

**Withholding future payments**

If you have received EMA payments through a provisional award and it is found that you were not eligible, these funds will be recovered by withholding the equivalent amount from any future claim.