

Education Maintenance Allowance (EMA) 2022/23

Application Form



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



www.studentfinancewales.co.uk/ema

How to complete this application form

- Follow the instructions, we'll tell you what questions you need to answer and what ones you can skip.
- You'll need to have your bank, building society or credit union details to hand.
- Section 8 will ask about your household financial details. Depending on your situation, either your parent(s)/ guardian(s) or you (and your partner, if you have one) will need to complete this section. Whoever completes this section will need their National Insurance number to hand.
- You need to complete all of the questions you're asked to. Any missing information will delay your application for EMA.
- Where we ask for evidence – we will need it before your application can be accepted. Any missing evidence will delay your application for EMA.



If your household income is £23,078 or more do not complete this application form – you may not be eligible for this allowance. If you're an eligible care leaver we won't need details of your income.

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

Use the notes



Where you see this you should check the notes for specific **information** to help you complete a question or section.



Where you see this you need to send us **evidence** to support your application. Use the notes to find out exactly what you need to send. You should send **photocopies** of your evidence unless otherwise stated. We will return any original documents.

How we process your data

To find out more about how your information is used and why, make sure you read our Information Usage Summary on page 3 of the accompanying notes.

What if I can't send the evidence you need now?

Return your application without the evidence. By doing this we can make a start on your application, but we won't be able to pay you until we see the documents we've asked for. We'll write to you to confirm what documents we still need to see.

2022/23 Calendar

April 2022	Application forms available for download from www.studentfinancewales.co.uk/ema
June 2022	Return your application with all required evidence before 30 June 2022 to make sure your EMA is agreed and ready for the start of your first term.
September 2022	Term starts - apply within 13 weeks for your payments to be backdated to the start of your term. Applications outside 13 weeks may not receive backdated payments.
January 2023	2023
August 2023	We need to have received your completed application form and evidence before 31 August 2023 for you to be eligible for EMA in academic year 2022/23.

Section 1 Agreements and consent

1.1 Tick the statement that applies to you and follow the instruction.

! By authorised third party we mean someone who is authorised to act and/or receive payments on the student's behalf. Evidence is required such as documentation from a Local Authority or a Power of Attorney.

I am the student completing this form myself. Complete the **Student Agreement below**.

I am an **authorised third party** who is **both**:
i completing this form on behalf of the student because they are unable to **and**
i authorised to hold funds on behalf of the student. Complete the **Third Party Agreement A on page 4**.

I am an **authorised third party** who is **only**:
i completing this form on behalf of the student because they are unable to. Complete the **Third Party Agreement B on page 4**.

I am an **authorised third party** who is **only**:
i authorised to hold funds on behalf of the student. Complete the **Third Party Agreement C on page 4**.

Student Agreement **i**

By signing this agreement you are confirming that:

- the information you will give on this form is correct and complete to the best of your knowledge and belief;
- you will submit supporting evidence in accordance with the accompanying notes;
- you understand that if you have provided details of your UK passport, SLC will verify those details with HM Passport Office;
- you understand that any attempt to dishonestly obtain EMA shall be treated as fraud and may result in criminal and/or civil proceedings against you; and
- where you have provided any personal information in relation to a third party, you have informed them of this.

Student full name (in BLOCK CAPITALS)

Today's date

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Student signature



Now go to **Consent to share below**

Consent to share

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 can't give out information about your application or award to anyone without your consent.

- 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 8 of this application form.

No Yes

and (if applicable)

- 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 8 of this application form.

No Yes



Now go to **Section 2**



Section 1 Agreements and consent (continued)

Third Party Agreement A

By signing this agreement you are confirming that:


- the information you will give on this form is correct and complete to the best of your knowledge and belief;
- you will submit supporting evidence in accordance with the accompanying notes;
- you are authorised to act on the student's behalf and have enclosed evidence to prove this;
- the student named in **Section 2** is unable to have a bank, building society or credit union account in his/her own name;
- you will provide correct bank, building society or credit union details in your own name;
- you are authorised to hold funds on the student's behalf and have enclosed evidence to prove this;
- you will use any EMA payments made as a result of this application in accordance with the student's instructions; and
- you have read and understood these statements.

Authorised third party full name (in BLOCK CAPITALS)

Signature

Today's date

Day			-	Month			-	Year				

 **Now go to 1.2**

Third Party Agreement B

By signing this agreement you confirm that:


- the information you will give on this form is correct and complete to the best of your knowledge and belief;
- you will submit supporting evidence in accordance with the accompanying notes;
- you are authorised to act on the student's behalf and have enclosed evidence to prove this; and
- you have read and understood these statements.

Authorised third party full name (in BLOCK CAPITALS)

Signature

Today's date

Day			-	Month			-	Year				

 **Now go to 1.2**

Third Party Agreement C

By signing this agreement you confirm that:


- the student named in **Section 2** is unable to have a bank, building society or credit union account in his/her own name;
- you will provide correct bank details in your own name, are authorised to hold funds on the student's behalf and have enclosed evidence to prove this;
- you will use any EMA payments made as a result of this application in accordance with the student's instructions; and
- you have read and understood these statements.

Authorised third party full name (in BLOCK CAPITALS)

Signature

Today's date

Day			-	Month			-	Year				

 **Now go to 1.2**

Section 1 Agreements and consent (continued)

1.2 Third party details

e You need to send evidence to prove your authorisation, read the notes to find out what you need to send.

You must contact us if the student's contact details change or if the student's nominated third party's details change during the academic year.

All correspondence will continue to be addressed directly to the student.

Forename(s)	<input type="text"/>
Surname	<input type="text"/>
Home address	<input type="text"/>
Postcode	<input type="text"/>
Home phone number	<input type="text"/>
Mobile phone number	<input type="text"/>
Email address	<input type="text"/>

Section 2 Student's details

2.1 Customer Reference Number

(if you do not have one yet, leave this blank)

2.2 Personal details

Complete these details exactly as stated on your birth certificate, passport or deed poll.

If any of your details change during the year you need to let us know.

- e** You need to send evidence of your identity, such as your original birth certificate. Read the notes for a full list of what you can send.

Title
 Mr Mrs Miss Other

Forename(s)

Surname

Gender
 Male Female

Date of birth
Day Month Year
 - -

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

2.3 What language would you like us to use when we communicate with you?

English Welsh

2.4 Contact details

- e** You need to send evidence, such as a photocopy of your household gas or electricity bill. Read the notes for a full list of what you can send.

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

Home address

Postcode

Home phone number

Mobile phone number (we may contact you by text message)

Email address

Section 3 Your payment details

- 3.1** Are you completing this section as an **authorised third party** who will hold the student's EMA payments on their behalf?

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

- No** – I am the student – go to **3.2**
- Yes** – go to **3.3**

- 3.2** Student payment details

This account must be in your name and be able to accept direct credits.

You must provide your details in full or we won't be able to pay you.

Account holder's name (student)

Sort code

 - -

Account number

- 3.2a** Is this a building society or credit union account?

- No** – go to **Section 4**
- Yes** – provide your:

Building society roll/credit union membership number

Now go to **Section 4**

- 3.3** Third party payment details

This account must be able to accept direct credits.

You must provide your details in full or we won't be able to pay you.

Account holder's name (third party)

Sort code

 - -

Account number

- 3.3a** Is this a building society or credit union account?

- No** – go to **Section 4**
- Yes** – provide your:

Building society roll/credit union membership number

Now go to **Section 4**

Section 4 Student's school or college details

4.1 Give details of where you intend to study from September 2022.

If you do not know where you'll study, give details of the school or college you want to attend.

If these details change you must let us know as soon as possible and no later than before the start of your first term.

Name of school or college

Campus (if applicable)

School or college address

Postcode

Now go to [Section 5](#)

Section 5 Student's nationality and residency details

5.1 Are you a UK national?

e The easiest way for you to verify your identity is to provide your UK passport details. This means **you do not need to send us your passport**. Your passport must be currently valid and not expired.

We will share the passport details you give us with HM Passport Office so that we can verify your identity.

e **UK passport expired?**
If your UK passport has expired we can't accept this information as proof of your identity. You'll have to send alternative evidence as set out in the accompanying notes.

5.2 Are you an Irish citizen?

5.3 Are you the family member of a UK national?

No – go to [5.2](#)

Yes – do you hold a valid UK passport?

No – you need to send supporting documents. Read the notes to see what you need to send then go to [6.1](#)

Yes – enter these details exactly as stated on your passport

Passport number

Date of issue

Day Month Year

 - -

Date of expiry

Day Month Year

 - -

Forename(s)

Surname

Now continue to [6.1](#)

No – go to [5.3](#)

Yes – Have you been ordinarily resident in the UK and Islands for the three years prior to the first day of the first academic year of your course?

No – go to [5.3](#)

Yes – you need to send supporting documents. Read the notes to see what you need to send then go to [6.1](#)

No – go to [5.5](#)

Yes – go to [5.4](#)

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

5.4 Have both you and your UK national family member been ordinarily resident in the UK, EEA, Switzerland and Gibraltar for the three years prior to the first day of the first academic year of your course?

No – go to **5.5**

Yes – Were both you and your UK national family member:

- living in the UK on 31 December 2020, after moving to the UK from the EEA or Switzerland on or after 1 January 2018; or
- living in the EEA or Switzerland on 31 December 2020?

No – go to **5.5**

Yes – you need to send supporting documents. Read the notes to see what you need to send then go to **6.1**

e

5.5 Have you been granted settled status or pre-settled status under the EU Settlement Scheme?

No – go to **5.6**

Yes – I have been granted settled status

e Have you been living in the UK and Islands for the three years prior to the first day of the first academic year of your course?

No – go to **5.6**

Yes – Please provide your:
Share code

go to **6.1**

Yes – I have been granted pre-settled status

e Are you an EU national **and** you have been living in the UK and Islands for the three years prior to the first day of the first academic year of your course?

No – go to **5.6**

Yes – Please provide your:
Expiry date for pre-settled status

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Share code

go to **6.1**

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

5.6 Are you the child of a Swiss national and both you and your parent/step-parent have been granted a status under the EU Settlement Scheme?

No – go to **5.7**

Yes – Have you been ordinarily resident in the UK, EEA, Switzerland and Gibraltar for the three years prior to the first day of the first academic year of your course?

No – go to **5.7**

Yes – Please provide your parent or step-parent's:

Date of birth

Day Month Year

- -

Expiry date for pre-settled status - if applicable

Day Month Year

- -

Share code

Please provide your:

Expiry date for pre-settled status - if applicable

Day Month Year

- -

Share code

go to **6.1**

5.7 Are you an EEA or Swiss national who is working, has worked or is looking for work in the UK, or a family member of such a person?

If you are the family member of the worker, you must be the:

- husband, wife, civil partner; or
- child, step-child; or
- parent, step-parent or other ascending or descending line family member (only applicable to EEA worker family members) of the worker.

*If you or a family member are a Frontier worker, check the notes

No – go to **5.8**

Yes – Have you been ordinarily resident in the UK, EEA, Switzerland, and Gibraltar for the three years prior to the first day of the first academic year of your course?

No – go to **5.8**

Yes – Is the person who is working, has worked or is looking for work in the UK:

You – go to **5.7a**

Your family member – go to **5.7b**

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

5.7a I am working, have worked or am looking for work

Provide details - You should also provide details of your previous study.

If you are currently working will you continue to work during your studies? If yes give details.

Expiry date for pre-settled status - if applicable

Day Month Year
□ □ - □ □ - □ □ □ □ □ □

Share code

now go to **6.1**

5.7b My family member is working, has worked or is looking for work and I am their:

husband/wife/civil partner

child or step-child

parent(s)/step-parent(s) or other ascending or

e descending line family member (only applicable to EEA worker family members)

Provide details of their employment

If they are currently working will they continue to work during your studies? If yes, give details of employment.

Please provide **your**:

Expiry date for pre-settled status - if applicable

Day Month Year
□ □ - □ □ - □ □ □ □ □ □

Share code

Please provide **your family member's**:

Date of birth

Day Month Year
□ □ - □ □ - □ □ □ □ □ □

Status expiry - if applicable

Day Month Year
□ □ - □ □ - □ □ □ □ □ □

Share code

now go to **6.1**

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

5.8 Are you the family member of an EEA or Swiss national who entered the UK before 31 December 2020, and you joined them after this date?

No – go to **5.9**

Yes – do they have settled/pre-settled status?

No – go to **5.9**

Yes – Have you made an application to the EU Settlement Scheme?

No – go to **5.9**

Yes – please provide your:

e Expiry date for pre-settled status - if applicable

Day Month Year

- -

Share code

Please provide your family member's:

Date of birth

Day Month Year

- -

Expiry date for pre-settled status - if applicable

Day Month Year

- -

Share code

now go to **6.1**

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

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

No – go to **5.10**

Yes **e**

I have been granted leave under the ARAP or ACRS.

I have been granted leave in line with my family member. My family member is my:

husband/wife/civil partner

parent or step-parent

Provide your:
Home Office reference number

Date latest status granted

Day Month Year

- -

Date this status is due to expire

Day Month Year

- -

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

No – go to **Section 7**

Yes – go to **6.2**

5.10 Do you have settled status in the UK?

By settled status we mean:

- you have been granted indefinite leave to enter or remain; or
- you have a right of abode in the UK.

No – go to **5.11**

Yes – provide your:

e Home Office reference number

Date granted status

Day Month Year

- -

Have you been ordinarily resident in the UK and Islands for three years prior to the first day of the first academic year of your course?

No – you need to send supporting documents. Please check “Break in residency” on page 5 of the notes, then go to **6.1**

Yes – you need to send supporting documents. Read the notes to see what you need to send and then go to **6.1**

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

5.11 Have you or a family member been granted Discretionary leave as a result of a failed asylum application?

No – go to **5.12**

Yes – Home Office reference number

e

Date latest status granted

Day Month Year

- -

Date this status is due to expire

Day Month Year

- -

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

No – go to **Section 7**

Yes – go to **6.2**

5.12 Have you or a family member been granted Discretionary leave (where no application for asylum has been made)?

No – go to **5.13**

Yes – Home Office reference number

e

Date latest status granted

Day Month Year

- -

Date this status is due to expire

Day Month Year

- -

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

No – go to **Section 7**

Yes – go to **6.2**

5.13 Have you or a family member been granted leave to remain in the UK on the grounds of family life?

No – go to **5.14**

Yes – Home Office reference number

e

Date latest status granted

Day Month Year

- -

Date this status is due to expire

Day Month Year

- -

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

No – go to **Section 7**

Yes – go to **6.2**

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

5.14 Have you or a family member been granted leave to remain in the UK on the grounds of private life?

No – go to **5.15**

Yes – Home Office reference number

e

Date latest status granted

Day Month Year

- -

Date this status is due to expire

Day Month Year

- -

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

No – go to **Section 7**

Yes – go to **6.2**

5.15 Have you or a family member been granted leave to remain outside the immigration rules?

No – go to **5.16**

Yes – Home Office reference number

e

Date latest status granted

Day Month Year

- -

Date this status is due to expire

Day Month Year

- -

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

No – go to **Section 7**

Yes – go to **6.2**

5.16 Have you or a family member been granted leave to remain as a Stateless Person?

No – go to **5.17**

Yes – Home Office reference number

e

Date latest status granted

Day Month Year

- -

Date this status is due to expire

Day Month Year

- -

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

No – go to **Section 7**

Yes – go to **6.2**

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

5.17 Have you or a family member been granted 'refugee status' in the UK or 'temporary protection status' in the UK?

No – go to **5.18**

Yes – Home Office reference number

e

Date latest status granted

Day Month Year

- -

Date this status is due to expire

Day Month Year

- -

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

No – go to **Section 7**

Yes – go to **6.2**

5.18 Have you or a family member been granted Humanitarian Protection?

No – go to **5.19**

Yes – Home Office reference number

e

Date latest status granted

Day Month Year

- -

Date this status is due to expire

Day Month Year

- -

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

No – go to **Section 7**

Yes – go to **6.2**

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

5.19 Are you the child of a Turkish Worker who is working in the UK?

No – go to **5.20**

Yes – has your Turkish worker parent/step-parent been granted extended leave to remain by the Home Office in the UK after 31 December 2020?

No – go to **5.20**

Yes – Were you and your Turkish worker parent/step-parent living in the UK by the 31st of December 2020?

No – go to **5.20**

Yes – Have you been ordinarily resident in the UK, EEA, Turkey, Switzerland and Gibraltar for the three years prior to the first day of the first academic year of your course?

No – go to **5.20**

Yes – go to **6.2**

5.20 Have you been granted leave to remain in the UK under Section 67 of the Immigration Act 2016 or are you the dependent child of someone who has?

No – go to **5.21**

Yes – Home Office reference number

e

Date status granted

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Date this status is due to expire

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

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

No – go to **Section 7**

Yes – go to **6.2**

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

5.21 Have you been granted 'Calais leave' in the UK or are you the dependent child of someone who has?

No – go to **5.22**

Yes – Home Office reference number

e

Date status granted

Day Month Year

- -

Date this status is due to expire

Day Month Year

- -

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

No – go to **Section 7**

Yes – go to **6.2**

5.22 Have you been granted leave to remain in the UK as the victim of domestic violence or abuse or are you the dependent child of someone who has?

No – go to **5.23**

Yes – Home Office reference number

e

Date status granted

Day Month Year

- -

Date this status is due to expire

Day Month Year

- -

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

No – go to **Section 7**

Yes – go to **6.2**

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

5.23 Have you been granted leave to remain as a person who has been a bereaved partner or are you the dependent child of someone who has?

No – go to **5.24**

Yes – Home Office reference number

e

Date status granted

Day Month Year

- -

Date this status is due to expire

Day Month Year

- -

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

No – go to **Section 7**

Yes – go to **6.2**

5.24 Tick the box which applies to you

I have answered 'Yes' to at least one question in this section.
You need to go back to the question you answered 'Yes' to and follow the instruction given there.

I have answered 'No' to all the questions in this section.
If you think you may be eligible but have answered 'No' to all the questions, please contact our helpline on **0300 200 4050**.

Section 6 Student's residence history

6.1 Tell us your address details for the last three years before the start of the first academic year of your course.

For example – if your course starts in September 2022, we need to know where you lived between 01/09/2019 and 01/09/2022. There should be no gaps in the dates you give us.

If you need more space, you can attach additional pieces of paper to this form.

Now go to **Section 7**

Home address		
<input type="text"/>		
Postcode		
<input type="text"/>		
From		
Day	Month	Year
<input type="text"/> <input type="text"/>	- <input type="text"/> <input type="text"/>	- <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
To		
Day	Month	Year
<input type="text"/> <input type="text"/>	- <input type="text"/> <input type="text"/>	- <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Why were you there?		
<input type="text"/>		

Home address		
<input type="text"/>		
Postcode		
<input type="text"/>		
From		
Day	Month	Year
<input type="text"/> <input type="text"/>	- <input type="text"/> <input type="text"/>	- <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
To		
Day	Month	Year
<input type="text"/> <input type="text"/>	- <input type="text"/> <input type="text"/>	- <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Why were you there?		
<input type="text"/>		

Section 6 Student's residence history (continued)

6.2 Give details of your residency from the date you received your last status from the Home Office.

NOTE

If you have been granted:

- indefinite leave to remain as the victim of domestic violence or abuse;

or

- indefinite leave to remain as a person who has been a bereaved partner

or

- leave under the Afghan Relocations and Assistance Policy (ARAP) or the Afghan Citizens Resettlement Scheme (ACRS)

only provide address history from when you received the status. You only need to provide up to a maximum of 3 years information. There should be no gaps in the dates you give us.

Now go to **Section 7**

Home address

Postcode

From

Day Month Year

□ □ - □ □ - □ □ □ □

To

Day Month Year

□ □ - □ □ - □ □ □ □

Why were you there?

Home address

Postcode

From

Day Month Year

□ □ - □ □ - □ □ □ □

To

Day Month Year

□ □ - □ □ - □ □ □ □

Why were you there?

Section 7 Student's independence details

7.1 Tick one of the following statements that will apply to you on the first day of the first academic year of your course.

- I am a care leaver/I live under Local Authority care or with foster parents – **go to 7.3**
- I receive Income Support, income-related Employment and Support Allowance or Universal Credit in my own name – **go to 7.3**
- I am responsible for a child – **go to 7.3**
- I am currently in custody/detention within the Youth Justice System – **go to 7.3**
- None of the above – **go to 7.2**

7.2 Do you live apart from your parent(s)/ guardian(s)?



- No** – you are a **dependent** student.
Your parent(s) or guardian(s) need(s) to complete the next section.
- Yes** – you are an **independent** student.
You (and your partner, if applicable) need to complete the next section.

7.3 **You are an independent student.**



You need to send supporting documents to prove the statement ticked. Read the notes to see what you need to send, then **go to Section 11**.

Section 8 Financial details

Part A

Section 8 is divided into four parts. Read the following for a quick summary of each part.

Part A

Tell us your name and some other personal information including your National Insurance number.

Part B

Answer every question.

Part C

Only complete if instructed.

Part D

Answer every question.

Who completes this section?

Question 7.2 told you who needs to complete this section for your application.

How to complete this section

If you are a single parent/guardian of the student

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

If there are two parents/guardians in the student's household


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

If you're an independent student with a partner

Enter your information as Person 1, your partner needs to enter their information as Person 2.

If you're an independent student without a partner

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

If you're self assessed – read page 21 of the notes for more information. 

If you're not self assessed – you can use your P60 to complete this section.

Data Sharing



We will share and check the details you give us with HM Revenue & Customs, allowing us to gain the most accurate information possible. This can only be done if you have a valid National Insurance (NI) number. This information will be used to work out if the student is eligible to get EMA based on household income. To find out more about how your information is used and why, make sure you read our Information Usage Summary on page 3 of the accompanying notes.

Personal details

Person 1

Relationship to student (if you're the student write n/a)		
<input type="text"/>		
Forename		
<input type="text"/>		
Surname		
<input type="text"/>		
Please provide your NI number below		
<input type="text"/>	-	<input type="text"/>
Date of birth		
Day	Month	Year
<input type="text"/>	-	<input type="text"/>
go to Part B		

Person 2

Relationship to student		
<input type="text"/>		
Forename		
<input type="text"/>		
Surname		
<input type="text"/>		
Please provide your NI number below		
<input type="text"/>	-	<input type="text"/>
Date of birth		
Day	Month	Year
<input type="text"/>	-	<input type="text"/>
go to Part B		

Section 8 Financial details (continued)

Part B

Financial information for tax year 2020-21


How to complete Part B

- Answer every question.
- Where you answer 'Yes' to a question you must give **gross** income amounts.
- Any amounts given must be for the tax year starting **6 April 2020** and ending **5 April 2021**.
- If you leave any question blank in **Part B** we will not be able to process this application.
- If you don't receive a specific type of income listed in a question, write 'n/a'.

Do I need to send any evidence of financial details with this application?

No, you don't need to send any evidence of your financial details now, but we may write out to request this at a later date.

What if my income has dropped since 2020-21?

 If your household income has permanently changed since tax year **2020-21**, read page 21 of the notes for more information.

8.1 Were you in receipt of Income Support or Income-related Employment and Support Allowance?

Person 1

Tax year 2020-21

No
 Yes

Person 2

Tax year 2020-21

No
 Yes

8.2 Were you in receipt of Universal Credit?

Tax year 2020-21

No
 Yes

Tax year 2020-21

No
 Yes

8.3 Did you receive any income from salary, wages, taxable state benefits or from occupational or private pensions?

Tax year 2020-21

No – go to **8.4**
 Yes – give details


Tax year 2020-21

No – go to **8.4**
 Yes – give details

 Total income from salary/wages

£

£

 Total income from taxable state benefits

£

£

Total income from occupational pension(s)

£

£

If you received a lump sum pension, only declare the amount you received that you paid tax on.







Total income from private pension(s)

£

£

If you received a lump sum pension, only declare the amount you received that you paid tax on.

Section 8 Financial details (continued)

	Person 1	Person 2
	Tax year 2020-21	Tax year 2020-21
8.4	Did you receive any income from a state retirement pension?	Did you receive any income from a state retirement pension?
	<input type="checkbox"/> No – go to 8.5	<input type="checkbox"/> No – go to 8.5
	<input type="checkbox"/> Yes – give details	<input type="checkbox"/> Yes – give details
	Total non-lump sum amount received	Total non-lump sum amount received
	£ <input type="text"/>	£ <input type="text"/>
	Total lump sum amount received	Total lump sum amount received
	£ <input type="text"/>	£ <input type="text"/>
8.5	Did you receive any income from savings and investments?	Did you receive any income from savings and investments?
	<input type="checkbox"/> No – go to 8.6	<input type="checkbox"/> No – go to 8.6
	<input type="checkbox"/> Yes – give details	<input type="checkbox"/> Yes – give details
	Total interest from UK banks, building societies and unit trusts	Total interest from UK banks, building societies and unit trusts
	£ <input type="text"/>	£ <input type="text"/>
	Total income from UK life insurance gains, securities and partnerships	Total income from UK life insurance gains, securities and partnerships
	£ <input type="text"/>	£ <input type="text"/>
	Total income from UK investments and dividends	Total income from UK investments and dividends
	£ <input type="text"/>	£ <input type="text"/>
	Total income from foreign investment and dividends	Total income from foreign investment and dividends
	£ <input type="text"/>	£ <input type="text"/>
8.6	Did you receive any taxable benefits in kind?	Did you receive any taxable benefits in kind?
	<input type="checkbox"/> No – go to 8.7	<input type="checkbox"/> No – go to 8.7
	<input type="checkbox"/> Yes – give details	<input type="checkbox"/> Yes – give details
	Total income from taxable benefits in kind	Total income from taxable benefits in kind
	£ <input type="text"/>	£ <input type="text"/>
8.7	Did you receive any other income during tax year 2020-21 that you have not told us about in Part B ?	Did you receive any other income during tax year 2020-21 that you have not told us about in Part B ?
	<input type="checkbox"/> No – go to Part D	<input type="checkbox"/> No – go to Part D
	<input type="checkbox"/> Yes – go to Part C	<input type="checkbox"/> Yes – go to Part C

Section 8 Financial details (continued)

Part C

Any other income

How to complete Part C

- Answer every question.
- Where you answer 'Yes' to a question you must give **gross** income amounts.
- Any amounts given must be for the tax year starting **6 April 2020** and ending **5 April 2021**.
- If you leave any question blank we will not be able to process this application.
- If you don't receive a specific type of income listed in a question, write 'n/a'.

	Person 1	Person 2
	Tax year 2020-21	Tax year 2020-21
8.8 Did you receive any income from self-employment?	<input type="checkbox"/> No – go to 8.9 <input type="checkbox"/> Yes – give details	<input type="checkbox"/> No – go to 8.9 <input type="checkbox"/> Yes – give details
Total adjusted profit from businesses	£ <input type="text"/>	£ <input type="text"/>
Total adjusted profit from partnerships	£ <input type="text"/>	£ <input type="text"/>
8.9 Did you receive any income as a Minister of religion? Total taxable income minus expenses that are not included on your P60 or P11D	Tax year 2020-21 <input type="checkbox"/> No – go to 8.10 <input type="checkbox"/> Yes – give details £ <input type="text"/>	Tax year 2020-21 <input type="checkbox"/> No – go to 8.10 <input type="checkbox"/> Yes – give details £ <input type="text"/>
8.10 Did you receive any other taxable income or lump sums? Total income received	Tax year 2020-21 <input type="checkbox"/> No – go to 8.11 <input type="checkbox"/> Yes – give details £ <input type="text"/>	Tax year 2020-21 <input type="checkbox"/> No – go to 8.11 <input type="checkbox"/> Yes – give details £ <input type="text"/>
8.11 Did you receive any income from property lettings? Total income received	Tax year 2020-21 <input type="checkbox"/> No – go to 8.12 <input type="checkbox"/> Yes – give details £ <input type="text"/>	Tax year 2020-21 <input type="checkbox"/> No – go to 8.12 <input type="checkbox"/> Yes – give details £ <input type="text"/>

Section 8 Financial details (continued)

8.12 Did you receive any income from UK trusts?



Person 1
Tax year 2020-21

No – go to **8.13**

Yes – give details

£

Person 2
Tax year 2020-21

No – go to **8.13**

Yes – give details

£

Total income received

8.13 Did you receive any foreign income?



Tax year 2020-21

No – go to **8.14**

Yes – give details

£

Tax year 2020-21

No – go to **8.14**

Yes – give details

£

Total income received

8.14 Did you receive any income from an overseas pension?



Tax year 2020-21

No – go to **8.15**

Yes – give details

£

Tax year 2020-21

No – go to **8.15**

Yes – give details

£

Total income received

8.15 Did you receive any other overseas income and gains?



Tax year 2020-21

No – go to **Part D**

Yes – give details

£

go to **Part D**

Tax year 2020-21

No – go to **Part D**

Yes – give details

£

go to **Part D**

Total income received

Section 8 Financial details (continued)

Part D

Income deductions

How to complete Part D

- Answer every question.
- Where you answer 'Yes' to a question you must give **gross** deduction amounts.
- Any amounts given must be for the tax year starting **6 April 2020** and ending **5 April 2021**.
- If you leave any question blank in **Part D** we will not be able to process this application.
- If you don't receive a specific type of deduction listed in a question, write 'n/a'.

	Person 1	Person 2
8.16 Did you pay any private pension contributions? Do not include any payments to a workplace pension. Total amount you paid	Tax year 2020-21 <input type="checkbox"/> No – go to 8.17 <input type="checkbox"/> Yes – give details £ <input type="text"/>	Tax year 2020-21 <input type="checkbox"/> No – go to 8.17 <input type="checkbox"/> Yes – give details £ <input type="text"/>
8.17 Did you pay any Additional Voluntary Contributions (AVCs)? Total amount you paid	Tax year 2020-21 <input type="checkbox"/> No – go to 8.18 <input type="checkbox"/> Yes – give details £ <input type="text"/>	Tax year 2020-21 <input type="checkbox"/> No – go to 8.18 <input type="checkbox"/> Yes – give details £ <input type="text"/>
8.18  Did you have any allowable expenses on which you claimed tax relief? Total amount on which you claimed tax relief	Tax year 2020-21 <input type="checkbox"/> No – go to Section 9 <input type="checkbox"/> Yes – give details £ <input type="text"/> go to Section 9	Tax year 2020-21 <input type="checkbox"/> No – go to Section 9 <input type="checkbox"/> Yes – give details £ <input type="text"/> go to Section 9

Section 9 Student's family details

9.1 Is your total household income £20,817 or less per year?

No – go to **9.2**

Yes – go to **Section 10**

9.2 Is your household income £23,077 or less per year?

No – the applicant is not eligible for this allowance. Do not continue with this application.

Yes – are there any other young people in your household who are:

- under the age of age 16 and qualify for Child Benefit
- or**
- aged 16, 17, 18, 19 or 20 on 1 September 2022, are in full-time further education and qualify for Child Benefit?

No – the applicant is not eligible for this allowance. Do not continue with this application.

Yes – go to **9.3**

9.3 Give details of any young people or children in your household who are:

- under the age of 16 and qualify for Child Benefit
- or**
- aged 16, 17, 18, 19 or 20 on 1 September 2022, in full-time further education and qualify for Child Benefit.

e You need to send evidence for **each** young person you state. Read the notes to see what you need to send.

If you need more space, you can attach additional pieces of paper to this form.

Full name

Date of birth

Day Month Year

- -

Full name

Date of birth

Day Month Year

- -

Full name

Date of birth

Day Month Year

- -

Section 10 Parent(s)/guardian(s)/partner agreement

How to complete this section

If you are a single parent/guardian of the student

Read and understand the agreement below then sign and date as **Person 1**, leave **Person 2** blank.

If there are two parents/guardians in the student's household

Read and understand the agreement below then sign and date both **Person 1** and **Person 2**.

If you're an independent student with a partner

The partner needs to read and understand the agreement below then sign and date as **Person 2**, leave **Person 1** blank.

If you're an independent student without a partner

Don't complete this section – you've already signed your agreement in **Section 1**, continue on to **Section 11**.

Parent/Guardian/Partner Agreement

By signing this agreement you are confirming that:

- the information you have given on this form is correct and complete to the best of your knowledge and belief;
- you understand that any attempt to dishonestly obtain EMA shall be treated as fraud and may result in criminal and/or civil proceedings against you; and
- you have read and understood these statements.

Person 1	Person 2
Full name (in BLOCK CAPITALS) <input type="text"/>	Full name (in BLOCK CAPITALS) <input type="text"/>
Signature <input type="text"/>	Signature <input type="text"/>
Today's date Day Month Year <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Today's date Day Month Year <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>



Now pass this form back to the student

Section 11 Finalising your application



This must be completed by the student

11.1 Have you signed and dated your agreement in **Section 1**?

- No** – you must sign the agreement, we can't process your application without it.
- Yes**

11.2 Have you answered all the questions that apply to you?

- No** – if you don't complete a section or question you've been asked to, this could delay your EMA payments.
- Yes**

11.3 Did your parent(s)/guardian(s) or your partner complete **Sections 8, 9 and 10**?

Remember – **Section 7** told you if you needed to do this or not.

- No** – if you have been instructed that these sections are to be completed, and you forget to do this, it will delay any EMA payments you could get.
- Yes**

11.4 Have you included **all** the evidence we've asked for?

All students need to send evidence of their identity and home address for **Sections 2 and 5**.

Some students will also need to send evidence of their independence details for **Section 7**.

Your parent(s)/guardian(s) or your partner will need to send evidence of any young people they mentioned in **Section 9**.

Use the notes to check you've included the right evidence for each section.

- No** – if there's some supporting evidence you can't give us right now, you can send your application back without it. This means we can make a start on your application and we'll contact you for the evidence later but we won't be able to confirm if you can get EMA payments until you've sent all your evidence.
- Yes** – read the '3 things to remember' information on the next page before returning your application form.

3 things to remember



1 Get paid on time!

Send us your completed application form as soon as you can and as far in advance of your course start date as possible so that there is plenty of time for us to contact you to finalise your EMA application before you start your studies.

Don't worry if you don't have all your supporting documentation right now, still send us your completed form so we can start to process it. Just send in your evidence as soon as you can after this in order to avoid any delay.

Make sure you send us your completed application form with all appropriate evidence by **30 June 2022** at the latest if you want to have your EMA application assessed and ready for the start of your course.



2 Check the postage

Make sure that you've included all evidence with your completed application, had it weighed and paid the correct postage costs.

Remember to ask for proof of postage!



3 Send the form

Return your completed form and supporting evidence to the address below:

**EMA Customer Services
PO Box 5596
Glasgow
G52 9BR**

Confidential

Equal opportunities questionnaire

How to complete this section

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 Government develop its policies in the future.

1 Do you consider yourself to have a disability?

Yes No

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

Welsh British
 Irish Scottish
 English Other

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

A White
 British
 Any other white background

B Mixed
 White and Black Caribbean
 White and Black African
 White and Asian
 Any other mixed background

C Asian or Asian British
 Indian
 Pakistani
 Bangladeshi
 Any other Asian background

D Black or Black British
 Caribbean
 African
 Any other black background

E Chinese or other ethnic group
 Chinese
 Any other

