

EDUCATION MAINTENANCE ALLOWANCE (EMA)

Application Form Academic year2017/18



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) 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.

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. All documents you send must be originals, we can't accept copies. We will send your originals back to you.

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 from you.

2017/18 Calendar

March 2017

Application forms available for download from www.nidirect.gov.uk

June 2017 Return your application with all required evidence before 30 June 2017 to make sure your EMA application can be processed and ready for the start of your first term

September 2017

Term starts

If you're applying late, you need to apply before 30 September 2017 to be able to get your payments backdated to the start of term

January 2018 2018

March 2018

We need to have received your application before 31 March 2018 for you to be eligible for EMA in academic year 2017/18

August 2018

We need to have received all your information and evidence before 31 August 2018 for you to be eligible for EMA in academic year 2017/18



If your household income is £22,501 or more do not complete this application form - you will not be eligible for this allowance.

Section 1 Agreements

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

By authorised third party we mean someone who is able to provide evidence from a public body or a Power of Attorney confirming their status.

I am the student completing this form myself.

Complete the Student Agreement below.

I am an authorised third party who is both:

- · completing this form on behalf of the student because they are unable to and
- I am authorised to hold funds on behalf of the student.

Complete the Authorised Third Party Agreement A below.

I am an authorised third party who is only:



 completing this form on behalf of the student because they are unable to.

Complete the Authorised Third Party Agreement B on page 4.

I am an authorised third party who is only:

authorised to hold funds on behalf of the student.

Complete the Authorised Third Party Agreement C on page 4.

Student Agreement



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 any attempt to dishonestly obtain EMA shall be treated as fraud and will be subject to disciplinary procedures involving the Police Service of Northern Ireland (PSNI);
- you agree that in the event of receiving an overpayment of financial support, you are obligated to repay this in full;
- you have read and understood the Data Protection Statement included on page 3 of the accompanying notes; and
- you have read and understood these statements.

Student full name (in BLOCK CAPITALS)		Today's date DAY MONTH				YEAR			
							LAN	П	
Student signature									
				ı	Now	skij	o to S	ectic	on 2

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 agree that in the event of the student receiving an overpayment of financial support, the student is obligated to repay this in full;
- you will provide correct bank, building society or credit union details in your own name, are authorised to hold funds on the student's behalf and have enclosed evidence to prove this:
- you have read and understood the Data Protection Statement included on page 3 of the accompanying notes;
- you will use 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)	Today's			
Authorised Third Farty full flame (III blook CAFTIALS)	DAY	MONTH	YEAR	
		-	-	
Authorised Third Party Signature				
			Now g	o to 1.2



Section 1 Agreements (continued)

Third Party Agreement B

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 have read and understood the Data Protection Statement included on page 3 of the accompanying notes;
- · you are authorised to act on the student's behalf and have enclosed evidence to prove this; and
- you agree that in the event of the student receiving an overpayment of financial support, the student is obligated to repay this in full;

 you have read and understood these statements. Authorised Third Party full name (in BLOCK CAPITALS) 	Today's date DAY MONTH YEAR
Authorised Third Party Signature	
	Now go to 1.2

Third Party Agreement C

By signing this agreement you are confirming 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, 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 agree that in the event of the student receiving an overpayment of financial support, the student is obligated to repay this in full;
- you have read and understood the Data Protection Statement included on page 3 of the accompanying notes;
- you will use any EMA payments made as a result of this application in accordance with the student's instructions;
- you have read and understood these statements.

Authorised Third Party full name (in BLOCK CAPITALS)	Today's date		
	DAY MONTH YEAR		
Authorised Third Party Signature			
	Now go to 1.2		

1.2 Third Party details



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)
Surname
Home address
Postcode
Home phone number
Mobile phone number
Email address

Section 2 Your details

2.1 Customer Reference Number:

(if you don't 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

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 O	ther
Forename(s)	
Surname	
Gender	
Gender	
Male Female	
Date of birth	
DAY MONTH YEAR	
Place of birth (the name of the town or	village)

2.3 Contact Details

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

Postcode Home phone number Mobile phone number (We may contact you by text message.) Email address

2.4 What was the name of your first school?

If you ever need to call us we'll ask you for the answer you give to this question as a security check, you need to remember the answer you give!

EMANI/APP/1718 5

Home 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 able to provide evidence from a public body or a Power of Attorney confirming their status.

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!

No – go to 3.2	
Yes – go to 3.3	

Account holder's name (student)
Sort code
Account number
Building society roll/credit union membership number
(if applicable)
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
Building society roll/credit union membership number
(if applicable)
Now go to Section 4

Section 4 Your school or college details

- 4.1 Are you in receipt of, or have you been approved to receive either:
 - a Further Education (FE) Award from the Department for the Economy

or

- a Department of Agriculture, Environment and Rural Affairs (DAERA) Bursary?
- **4.2** Give details of where you intend to study from September 2017

If you don't know where you'll study, give the details for your current school or college.

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

No – go to 4.2	
Yes – You are not eligible for this allowance. Do not continue with this application.	

Name of school of college
Campus (if applicable)
School or college address
Postcode
1 Usicoue
Now go to Section 5

Section 5 Your nationality and residency details

5.1 Are you a UK or ROI national?

Read page 5 of the notes to understand what we mean by 'ordinarily resident'.

Yes - Have you been ordinarily resident in either:

• the UK; or

• the EU/EEA; or

• Switzerland
for three years prior to the first day of your course?

No - You need to send evidence, read
the notes to see what you need to send and then skip to
Section 6.

Yes - You need to send evidence, read
the notes to see what you need to send and then skip to
Section 7.

5.2 Do you have 'Settled Status' in the UK?

By 'Settled Status' we mean:

- you have a right of permanent residence' in the UK; or
- you have been granted indefinite leave to remain: or
- you have a right of abode in the UK
- Read page 5 of the notes to understand what we mean by 'ordinarily resident'.

No – Go to 5.3

Yes – Have you been ordinarily resident in either:

• the UK; or

• the EU/EEA; or
• Switzerland
for three years prior to the first day of your course?

No – You need to send evidence, read the notes to see what you need to send and then skip to Section 6.

Yes – You need to send evidence, read the notes to see what you need to send and then skip to Section 7.

Section 5 Your nationality and residency details (continued)

5.3 Have you or a family member been granted 'Leave to Enter or Remain for Humanitarian Protection' or 'Discretionary Leave'?

Your family member must be your husband, wife, civil partner, parent, step parent, child or step-child.

Read page 5 of the notes to understand what we mean by 'ordinarily resident'.

Do you or a family member have 'Refugee status in the UK' or 'EU temporary protection status' in the UK?

Your family member must be your husband, wife, civil partner, parent, step parent, child or step-child.

- Read page 5 of the notes to understand what we mean by 'ordinarily resident'.
- **5.5** Are you an **EU national**?
- Read page 5 of the notes to understand what we mean by 'ordinarily resident'.

No – Go to 5.4

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

No – Go to 5.4

Yes – You need to send evidence, read the notes to see what you need to send and then skip to Section 7.

No – Go to 5.5

Yes – Have you been ordinarily resident in the UK since this status was awarded?

No – Go to 5.5

Yes – You need to send evidence, read the notes to see what you need to send and then skip to Section 7.

No – Go to 5.6

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

No – Go to 5.6

Yes – You need to send evidence, read the notes to see what you need to send and then skip to Section 7.

Section 5 Your nationality and residency details (continued)

- 5.6 Are you the child of a Turkish national who is working or has worked in the UK?
- Read page 5 of the notes to understand what we mean by 'ordinarily resident'.
- No Go to 5.7

 Yes Have you been ordinarily resident in either:

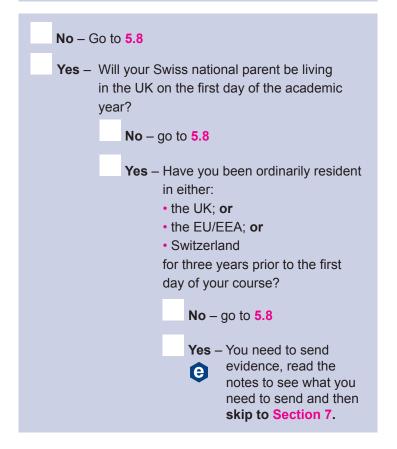
 the UK; or

 the EU/EEA; or

 Turkey
 for three years prior to the first day of your course?

 No go to 5.7

 Yes You need to send evidence, read the notes to see what you need to send and then skip to Section 7.
- 5.7 Are you the child of a Swiss national?
- Read page 5 of the notes to understand what we mean by 'ordinarily resident'.



Section 5 Your nationality and residency details (continued)

5.8 Are you or a family member an EEA or Swiss national who is working/has worked or is looking for work in the UK?

Your family member must be your husband, wife, civil partner, parent, step parent, child or step-child.

Read page 5 of the notes to understand what we mean by 'ordinarily resident'.

5.9 Tick the box which applies to you.

No – Go to 5.9

Yes – Have you been ordinarily resident in either:

• the UK; or

• the EU/EEA; or

• Turkey; or

• Switzerland
for three years prior to the first day of your course?

No – go to 5.9

Yes – You need to send evidence, read the notes to see what you need to send and then skip to Section 7.

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

You are not eligible for this grant. Do not continue with this application.

Section 6 Your 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

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

Home address
Postcode
From
DAY MONTH YEAR
То
DAY MONTH YEAR
Why were you there?
Home address
Postcode
From
DAY MONTH YEAR
То
DAY MONTH YEAR
Why were you there?

Section 7 Your independence details

7.1 Tick any of the following statements that apply to you and follow the instructions

I live under the care of the Department of Health or foster parent(s)

I receive Income Support or income-related Employment and Support Allowance in my own name

I am responsible for a child

If you ticked any of the above

e You need to send evidence to prove each statement ticked. Read the notes to see what you need to send. Then skip to Section 11 to finalise your application.

If you have not ticked any 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.

Section 8 Financial details

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 of 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/quardians 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 9 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.

Part A

8.1 Personal details

Person 2 Person 1

Relationship to student (if you're the student, write N/A)	Relationship to student
First name	First name
Family name	Family name
Please provide your NI number below	Please provide your NI number below
go to Part B	go to Part B
Date of birth DAY MONTH YEAR	Date of birth DAY MONTH YEAR

Part B

Financial information for tax year 2015-16

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 2015 and ending 5 April 2016
- 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 to request this at a later date.

What if my income has dropped since 2015-16?

- in If your household income has permanently
- changed since tax year 2015-16, read page 9 of the notes for more information.

		Person 1 Tax year 2015-16	Person 2 Tax year 2015-16	
8.2	Were you in receipt of Income Support or income-related Employment and Support Allowance?	No Yes	No Yes	
8.3	Were you in receipt of Working Tax Credits or Child Tax Credits?	No Yes	No Yes	
8.4	Did you receive any income from salary, wages, taxable state benefits or from occupational or private pensions?	No - go to 8.5 Yes - give details	No - go to 8.5 Yes - give details	
(i)	Total income from salary/wages	£	£	
(1)	Total income from taxable state benefits	£	£	
	Total income from occupational pension(s)	£	£	
	Total income from private pension(s)	£	£	

		Person 1 Tax year 2015-16	Person 2 Tax year 2015-16	
8.5	Did you receive any income from a state retirement pension?	No - go to 8.6	No - go to 8.6	
		Yes - give details	Yes - give details	
	Total non-lump sum amount received	£	£	
	Total lump sum amount received	£	£	
8.6	Did you receive any income from savings and investments?	No - go to 8.7 Yes - give details	No - go to 8.7 Yes - give details	
(1)	Total interest from UK banks, building societies and unit trusts	£	£	
(i)	Total income from UK life insurance gains, securities and partnerships	£	£	
(i)	Total income from UK investments and dividends	£	£	
(i)	Total income from foreign investment and dividends	£	£	
8.7	Did you receive any taxable benefits in kind?	No - go to 8.8 Yes - give details	No - go to 8.8 Yes - give details	
	Total income from taxable benefits in kind	£	£	
8.8	Did you receive any other income during tax year 2015-16 that you have not told us about in Part B ?	No – go to Part D Yes – go to Part C	No – go to Part D Yes – go to Part C	

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 2015 and ending 5 April 2016
- If you leave any question blank in Part C 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 Tax year 2015-16		Person 2 Tax year 2015-16	
8.9	Did you receive any income from self-employment?		No - go to 8.10		No - go to 8.10
			Yes - give details		Yes - give details
(i)	Total adjusted profit from businesses	£		£	
(1)	Total adjusted profit from partnerships	£		£	
8.10 ①	Did you receive any income as a Minister of religion?		No - go to 8.11		No - go to 8.11
	Total taxable income minus expenses that are not included on your P60 or P11D	£	Yes - give details	£	Yes - give details
8.11	Did you receive any other taxable income or lump sums?		No - go to 8.12 Yes - give details		No - go to 8.12 Yes - give details
	Total income received	£	g 3	£	give acume
8.12	Did you receive any income from property lettings?		No - go to 8.13 Yes - give details		No - go to 8.13 Yes - give details
	Total income received	£		£	9

		Person 1 Tax year 2015-16		Person 2 Tax year 2015-16	
8.13	Did you receive any income from UK trusts?		No - go to 8.14		No - go to 8.14
			Yes - give details		Yes - give details
	Total income received	£		£	
0.44	Didonomento en femine				
8.14	Did you receive any foreign income?		No - go to 8.15		No - go to 8.15
			Yes - give details		Yes - give details
	Total income received	£		£	
0.45	Did you receive any income from				
8.15 Did you receive any income from an overseas pension?	•		No - go to 8.16		No - go to 8.16
			Yes - give details		Yes - give details
	Total income received	£		£	
0.46	Did you receive any other				
8.16	Did you receive any other overseas income and gains?		No - go to Part D		No - go to Part D
Total income re			Yes - give details		Yes - give details
	Total income received	£		£	
rotal moonio roccinou			go to Part D		go to Part D

Part D

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 2015 and ending 5 April 2016
- 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 Tax year 2015-16 Tax year 2015-16 8.17 Did you pay any private pension No - go to 8.18 No - go to **8.18** contributions? Yes - give details Yes - give details £ £ Total amount you paid 8.18 Did you pay any Additional No - go to 8.19 No - go to 8.19 Voluntary Contributions (AVCs)? Yes - give details Yes - give details £ £ Total amount you paid 8.19 Did you have any allowable No - go to Section 9 No - go to Section 9 expenses on which you claimed **①** tax relief? Yes - give details Yes - give details Total amount on which you £ £ claimed tax relief go to Section 9 go to Section 9

Section 9 Your family details Is your total household income £20,500 No - go to 9.2 or less per year? Yes - go to Section 10 9.2 Is your household income £22,500 or **No** - The applicant is not eligible for this allowance. less per year? Do not continue with this application. **Yes** - Are there any other young people in your household who are: under the age of 16 and qualify for Child Benefit aged 16, 17, 18, 19 or 20 on 1 September 2017, 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 in your Full name household who are: under the age of 16 and qualify for **Child Benefit** Date of birth DAY MONTH YEAR aged 16, 17, 18, 19 or 20 on 1 September 2017, in full-time further education and qualify for Child Benefit. You need to send evidence for **each** young Full name 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.

D ((1):#	
Date of birth DAY MONTH	YEAR
-	-
Full name	
Date of birth	VEAD
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 will be subject to disciplinary procedures involving the Police Service of Northern Ireland (PSNI);
- you have read and understood the Data Protection statement included on page 3 of the accompanying notes;
 and
- · you have read and understood these statements.

Person 1		Person 2
Full name (in Bl	LOCK CAPITALS)	Full name (in BLOCK CAPITALS)
Signature		Signature
	Today's date DAY MONTH YEAR	Today's date DAY MONTH YEAR



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
	needed to do this or not	
11.4	Have you included all the original evidence we've asked for?	No - If there's some supporting evidence you can't give us right now, you can send your application back without it.
	All students need to send evidence of their identity and home address for Sections 2 and 5.	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
	Some students will also need to send evidence of their independence details for Section 7.	your evidence
	The students' sponsor(s) will need to send evidence of any dependent young people they mentioned on the form for Section 9 .	Yes - Read the "3 things to remember" information on the next page before returning your application form.
	Use the notes to check you've included the right evidence for each section.	

3 things to remember



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 2017 at the latest if you want to have your EMA application assessed and ready for the start of your course.



Check the postage

Make sure that your completed application and all evidence are weighed and the postage costs are fully paid.

Remember to ask for proof of postage!



Send the form

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

EMA Customer Services PO Box 5591 Glasgow G52 9BJ



Please complete the equal opportunities questionnaire on the back page of this form.

Confidential Equal opportunities questionnaire

In order to monitor the uptake of services provided by the Department for the Economy and the impact of policies, applicants are requested to complete this questionnaire. Access to the answers you give on this questionnaire will be strictly controlled and will not be available to those considering your application.

Your answers will not affect your application for EMA.

Α	What is your religious affiliation?	I am a member of the Protestant Community I am a member of the Catholic Community I am a member of neither the Protestant nor Catholic Community
В	What is your gender?	Male Female
С	What is your marital status?	Single Married Separated Divorced Widowed Co-habiting Other – give details below
D	What is your carer status?	No caring responsibilities Care for own children Care for other relative Other – give details below
E	Do you consider yourself to have/ have had a disability?	No Yes – give details below
F	What is your ethnic origin?	Chinese Irish Traveller Black/African Caribbean Indian Pakistani White Asian other – give details below Other – give details below
G	How old are you?	16 17 18 19