

EDUCATION MAINTENANCE ALLOWANCE (EMA)

Application Form Academic year 2020/21

www.nidirect.gov.uk



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.



If your household income is £20,501 or more (for households with one dependent child); or £22,501 or more (for households with more than one dependent child) do not complete this application form – you will not be eligible for this allowance.

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

Student Finance ni is the student finance service provided by the Student Loans Company and the Education Authority, on behalf of the Department for the Economy. The information you provide will be used for the processing of EMA by the SLC and any subsequent administration relating to funding.

For more information on the data we collect, use and share 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 from you.

2020/21 Calendar

April 2020

Application forms for academic year 2020/21 available for download from www.nidirect.gov.uk

June 2020

Return your application with all required evidence before 30 June 2020 to make sure your EMA application can be processed and ready for the start of your first term.



Term starts – to have payments backdated to the start of the term, you must apply before 30 September 2020. If you apply after 30 September 2020 you may have your payments backdated to the Monday after you return the application.

March 2021 We need to have received your application before 31 March 2021 for you to be eligible for EMA in academic year 2020/21.

August 2021

We need to have received all your information and evidence before 31 August 2021 for you to be eligible for EMA in academic year 2020/21.

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 Evidence is required such as documentation from a Local Authority or a F	or receive payments on the student's behalf.						
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 Third Party Agreement A on page 4.						
I am an authorised third party who is only: 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: • authorised to hold funds on behalf of the student.	Complete the Third Party Agreement C on page 4.						
By signing this agreement ou 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 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; 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							
	Now complete Consent to share below						
Consent to share Important information if you live with your parent(s)/guardian(It is important that we know if you will let us talk about your application or partner. We can't give out information about your application or average of the state of the	on and award with your parent(s)/guardian(s) ward to anyone without your consent.						
 my application and award to the person named as person 1 in sec application form. I consent to the EMA customer services team providing details of t my application and award to the person named as person 2 in sec application form. 	he progress of						



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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 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 will use EMA payments made as a result of this application in a 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 B By signing this agreement you are confirming that: the information you will give on this form is correct and complete to you will submit supporting evidence in accordance with the accommendation you are authorised to act on the student's behalf and have enclosed you agree that in the event of the student receiving an overpayment to repay this in full; you have read and understood these statements. 	npanying notes; sed evidence to prove this; and ent of financial support, the student is obligated
Authorised third party full name (in BLOCK CAPITALS)	Today's date Day Month Year
Authorised third party signature	
F 31.7, 3.8	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 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)	Today's Day	Month	Year	
Authorised third party signature			Now go to 1.	.2

Section 1 Agreements and consent (continued)

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.

roiename(s)
Surname
Home address
Postcode
Home phone number
Mobile phone number
Email address

Section 2 Student's 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	Title Mr Mrs Miss Other
(3)	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.	Forename(s) Surname
	You must be aged 16, 17, 18 or 19 on or between 2 July 2019 and 1 July 2020 to be eligible.	Gender Male Female Date of birth Day Month Year
		Home address
2.3 ()	Contact details 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.	
		Postcode
		Home phone number
		Mobile phone number (We may contact you by text message.)
		Email address
2.4	What was the name of the student's 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	

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remember the answer you give!

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.

Accoun	t holde	er's nan	ne (stud	ent)						
Sort cod	de									
	-	-								
Accoun	t numb	per								
	П			П						
Building		ty roll/c	redit un	ion m	emb	ershi	ip nun	nber		
						No	ow go	to S	ection	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 Student's 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
 - a Department of Agriculture, Environment and Rural Affairs (DAERA) Bursary?

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

4.2 Give details of where you intend to study from September 2020.

If you don't 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** or **ROI national**?

If you're a UK passport holder, 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.

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

If you're a ROI passport holder, you need to send us your original passport.

Your passport must be currently valid and not expired.

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.

No – 9	go to 5.2								
Yes – do you hold a valid UK passport?									
	No – go to 5.1.1								
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 5.1.1								

5.1.1 Have you been ordinarily resident in:

- the UK; or
- the EU/EEA; or
- Switzerland

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

Read page 7 of the notes to understand what we mean by 'ordinarily resident'.

5.2 Are you an EU national?

Read page 7 of the notes to understand what we mean by 'ordinarily resident'.

No – you need to send supporting documents.

Please check Break in residency on page 7 of the notes, then go to Section 6.

Yes – if you didn't enter valid UK passport details, you need to send supporting documents. Read the notes to see what you need to send and then go to Section 6.

No – go to 5.3

Yes – have you been ordinarily resident in the UK for 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 and then go to Section 6.

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

5.3 D	o you	have	'settled	status'	in	the	UK?
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By 'settled status' we mean:

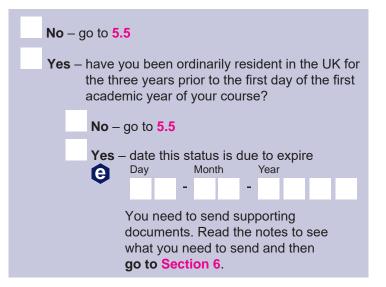
- you have a right of permanent residence in the uk; or
- you have been granted indefinite leave to remain; **or**
- you have a right of abode in the uk.
- Read page 7 of the notes to understand what we mean by 'ordinarily resident'.

No – g	o to	5.4								
Yes -	wha	t was	the o	date	yo	ou re	eceiv	ed tl	nis s	status?
	Day		Mont	th		Year				
		-			-					
Have you been ordinarily resident in: • the UK; or • the EU/EEA; or • Switzerland 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 7 of the notes, then go to Section 6.										
		Yes -	do wh	cum	en ou	ts. F	Reac	I the	note	ing es to see id then

5.4 Have you or a family member been granted 'leave to remain for humanitarian protection' or 'discretionary leave'?

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

Read page 7 of the notes to understand what we mean by 'ordinarily resident'.



5.5 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 or step-parent.

Read page 7 of the notes to understand what we mean by 'ordinarily resident'.

No – go to 5.6

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

No – go to 5.6

Yes – date this status is due to expire

Day

Month

Year

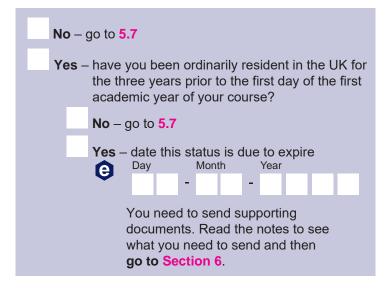
You need to send supporting documents. Read the notes to see what you need to send and then go to Section 6.

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

5.6 Have you or a family member been granted 'leave to remain' as a stateless person?

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

Read page 7 of the notes to understand what we mean by 'ordinarily resident'.



- 5.7 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?
- Read page 7 of the notes to understand what we mean by 'ordinarily resident'.
- No go to 5.8

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

 No go to 5.8

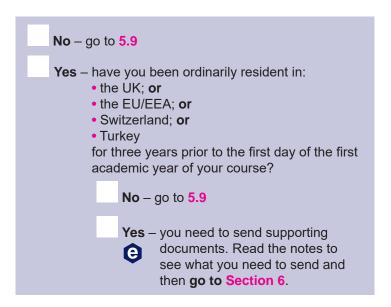
 Yes date this status is due to expire

 Day

 Month

 Year

 You need to send supporting documents. Read the notes to see what you need to send and then go to Section 6.
- 5.8 Are you the child of a Turkish national who is working or has worked in the UK?
- Read page 7 of the notes to understand what we mean by 'ordinarily resident'.



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

	(continuea)	
5.9	Are you the child of a Swiss national? Read page 7 of the notes to understand what we mean by 'ordinarily resident'.	Yes – will your Swiss national parent be living in the UK on the first day of the first academic year of your course? No – go to 5.10 Yes – have you been ordinarily resident in: • the UK; or • the EU/EEA; or • Switzerland for three years prior to the first day of the first academic year of your course? No – go to 5.10 Yes – you need to send supporting documents. Read the notes to see what you need to send and then go to Section 6.
5.10	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 or step-parent. Read page 7 of the notes to understand what we mean by 'ordinarily resident'.	No – go to 5.11 Yes – have you been ordinarily resident in: • the UK; or • the EU/EEA; or • Switzerland; or • Turkey for three years prior to the first day of the first academic year of your course? No – go to 5.11 Yes – you need to send supporting documents. Read the notes to see what you need to send and then go to Section 6.
5.11	Tick the box which applies to you.	I have answered 'Yes' to at least one question in this section.

with this application.

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

You are not eligible for this grant. Do not continue

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.

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

Postcode From Day Month Year To Day Month Year	Home address
From Day Month Year To Day Month Year	
From Day Month Year To Day Month Year	
From Day Month Year To Day Month Year	
From Day Month Year To Day Month Year	
From Day Month Year To Day Month Year	
From Day Month Year To Day Month Year	Destanda
Day Month Year To Day Month Year - - - - - - - - - -	Postcode
Day Month Year To Day Month Year	
Day Month Year To Day Month Year	From
To Day Month Year	
Day Month Year	
Day Month Year	To
Why were you there?	
vvny were you there?	
	NA/I
	Why were you there?
	Why were you there?
	Why were you there?

Home address
Postcode
From
Day Month Year
То
Day Month Year
Why were you there?

Section 7 Student's independence details

7.1	Tick one of the following statements that apply to you and follow the instructions.	I have lived under the care of the Department of Health or foster parent(s) throughout any three-month period ending on or after I reached the age of 16 and before the 1 September 2020 – go to 7.3 I receive Income Support or income-related Employment and Support Allowance in my own name – go to 7.3 I am responsible for a child – 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 Section 8. Yes – you are an independent student. You (and your partner, if applicable) need to complete Section 8.				
7.3	You are an independent student.					
(i)	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 indicated 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/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 14 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 Person 2

Relationship to student (if you're the student, write N/A)	Relationship to student					
Forename	Forename					
Surname	Surname					
Please provide your NI number below	Please provide your NI number below					
Date of birth Day Month Year	Date of birth Day Month Year					
go to Part B	go to Part B					

Part B

Financial information for tax year 2018-19

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 2018 and ending 5 April 2019.
- 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 2018-19?

- f your household income has permanently
- changed since tax year **2018-19**, read page 14 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 2018-19			Person 2 Tax year 2018-19				
	No		No				
	Yes		Yes				

- 8.2 Did you receive any income from salary, wages, taxable state benefits or from occupational or private pensions?
- Total income from salary/wages
- Total income from taxable state benefits

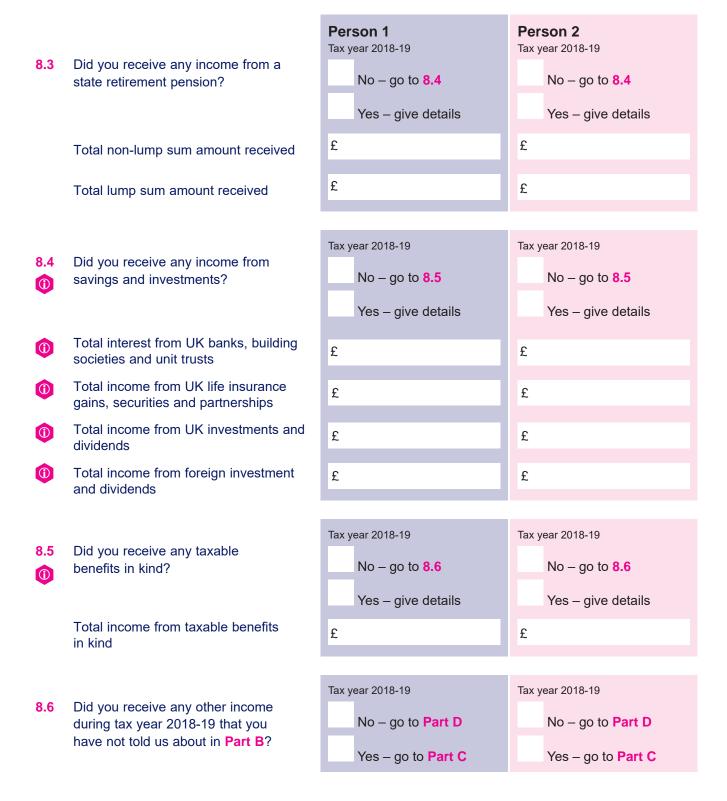
Total income from occupational pension(s)

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

Total income from private pension(s)

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

Yes		Yes				
Tax year 2018-19		Tax year 2018-19				
No – go to 8.3	3	No – go to 8.3				
Yes – give de	tails	Yes – give details				
£	£					
£	£					
£	£					
£	£					

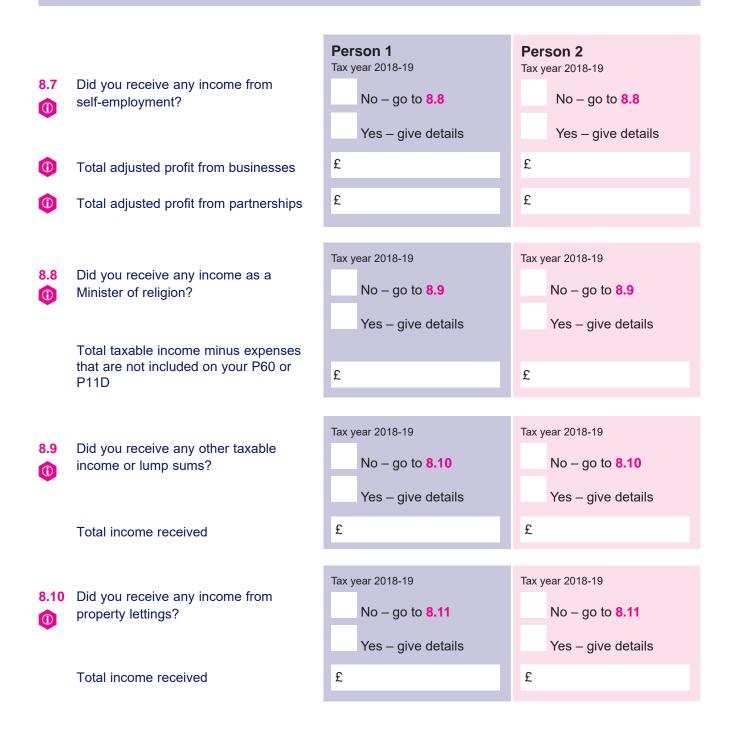


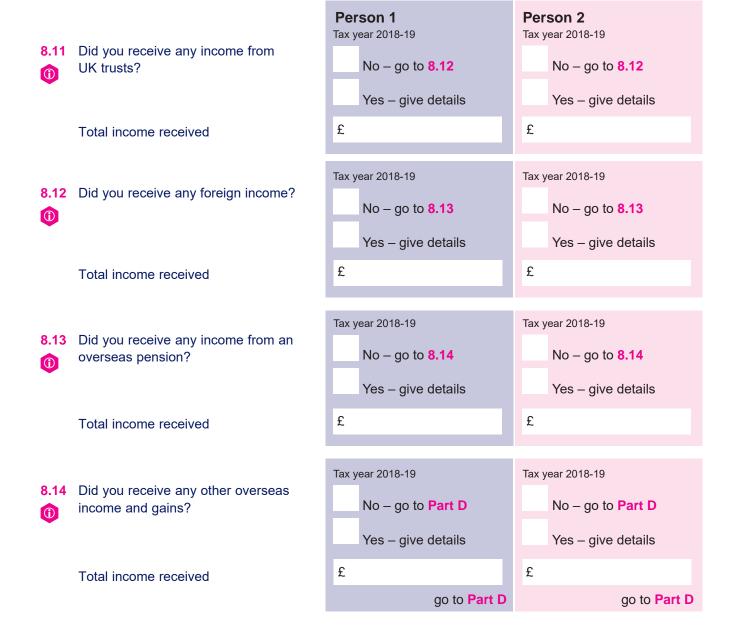
Part C

Any other income

How to complete Part C

- Answer every question.
- Where you answer 'Yes' to a question you must give gross income amounts. Tax year 2018-19
- Any amounts given must be for the tax year starting 6 April 2018 and ending 5 April 2019.
- 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'.





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 2018 and ending 5 April 2019.
- 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'.

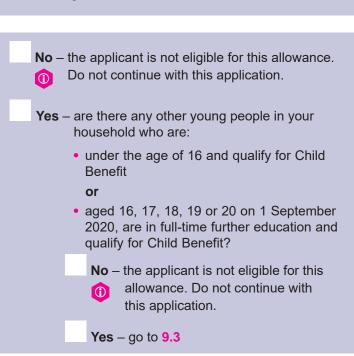


Section 9 Student's family details

- 9.1 Is your total household income £20,500 or less per year?

 No go to 9.2

 Yes go to Section 10
- **9.2** Is your household income £22,500 or less per year?



- **9.3** Give details of any young people 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 2020, in full-time further education and qualify for Child Benefit
- 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.

Date of b	irth			
Day	Month	Year		
	-	-		

Full	nam	е								
Date	of k	oirth								
Day		M	onth		Year					
		-		-						

Full na	me			
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 will be subject to disciplinary procedures involving the Police Service of Northern Ireland (PSNI); and
- · you have read and understood these statements.

Person 1	Person 2					
Full name (in BLOCK CAPITALS)	Full name (in BLOCK CAPITALS)					
Signature	Signature					
Today's date	Today's date					
Day Month Year	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?	Ne Ye	o – you must sign the agreement, we can't process your application without it.	
11.2	Have you answered all the questions that apply to you?	П	 o – if you don't complete a section or question you've been asked to, this could delay your EMA payments. 	
		Ye	es	
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.	П	 o – 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. 	
		Ye	2 8	
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 .	No	 o – 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. 	
	Use the notes to check you've included the right evidence for each section.	Ye	es – read the '3 things to remember' information on the next page before returning your application	

form.

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 2020 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 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!



Send the form

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

EMA Customer Services PO Box 5591 Glasgow G52 9BJ

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	Which of the following best describes your sexual orientation?	Heterosexual/Straight Bisexual Gay Lesbian Prefer not to say
D	What is your marital status?	Single Married Separated Divorced Widowed Cohabiting Other – give details below
E	What is your carer status?	No caring responsibilities Care for own children Care for other relative Other – give details below
F	Do you consider yourself to have/ have had a disability?	No Yes – give details below
G	What is your ethnic origin?	Chinese Irish Traveller Black/African Caribbean Indian Pakistani White Asian other – give details below Other – give details below
н	How old are you?	16 17 18 19