

Operational Processing

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Overview

- We will look at an application for student finance from the point of view of three different student case studies. The students represent 3 common types of student and will highlight the pit falls each student faces.
- We will review each section of the application, within each section we will focus on the question we know causes the most issues for students.
- Using our case studies we will look at the best way to answer these questions and the evidence that SLC needs dependent on a student's circumstances.
- After we have reviewed the application we will look at some key 'take aways' for each student.





Student Case Studies

meeting out students

Meet our students – Case study 1

CRAIG

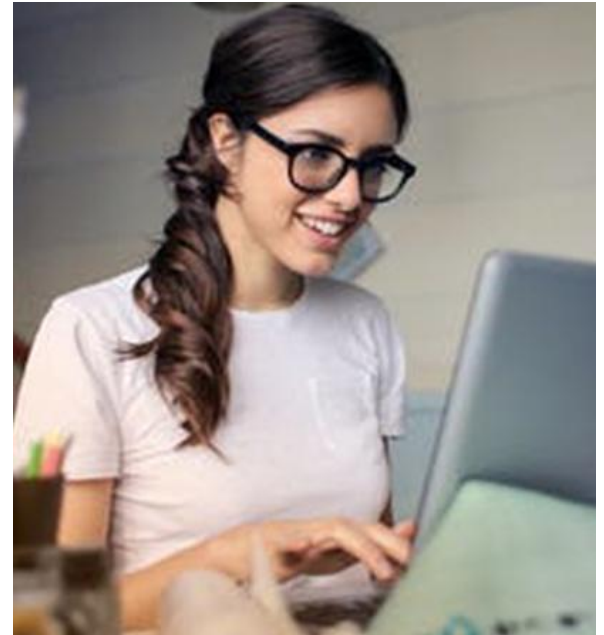
- A UK national and has lived in England since birth
- Is 18 years old
- Has a valid UK passport
- Has no previous study
- Currently lives at home with mother and father and will do for the duration of his study
- Is single



Meet our students – Case study 2

JENNIFER

- A French national and has lived in England for 8 year
- Is 30 years old
- Has a valid French passport
- Has studied 1 year of a degree in France before moving to England
- Lives on her own in a rented apartment near university
- Is single



Meet our students – Case study 3

JAMES

- A UK national and has lived in England since birth.
- Is 24 years old
- Has a British Birth Certificate
- Has studied 2 years of a degree previously
- Withdrew from the course after an accident and a period in hospital
- Lives on his own in student accommodation, before this lived with his mother and younger brother
- His mother's income has recently dropped
- Has a partner but is not married





Applying for finance

the student finance application

Section 2

Section 2

Personal details

Identity evidence details

b1 Do you hold a UK passport?

Yes

No

if no go to b3



Craig

- Enter UK passport details on the application.
- ID check will be automated.
- Quick and easy.



Jennifer

- Tick NO to this question.
- Will need to send ORIGINAL, valid ID.
- Name on ID must match application.



James

- Send original birth certificate.
- Must complete an ADIF, this must be signed by an accepted signatory and be fully completed.

Section 4

Section 4

About your course and university or college

Term details

- d Where will you live during this academic year?

Term 1

Living with parent(s)

Elsewhere or own home

Term 2

Living with parent(s)

Elsewhere or own home

Term 3

Living with parent(s)

Elsewhere or own home



Craig

- Must indicate **living with parents**, this will affect entitlement.
- Evidence may be asked for in relation to this question.



Jennifer

- Indicate **Elsewhere** as the student will receive more support.
- Evidence may be asked for in relation to this question.



James

- Indicate **Elsewhere** as the student will receive more support.
- Evidence may be asked for in relation to this question.
- .

Section 5

Section 5

Previous study and other information

a1 Have you started an undergraduate or postgraduate course of higher education in any country since leaving school? Tick 'Yes' even if you did not complete the course. **1**

Yes No

if no go to **b1**

a2 Did you achieve a qualification?

Yes No

if no go to **a4**



Craig

- Student has no previous study – do not include A’Levels, etc.



Jennifer

- Need to include any previous in countries other than England.
- Most students will be entitled to funding if they have only ONE year of previous study.



James

- Must include full details of all previous study.
- If applying for CPR (compelling personal reasons) will need evidence and show impact on study.

Other Sections

The below sections of the form are covered in more detail in the Grants for Dependants and Independent & Estranged Students Masterclasses.

Section 6

Bank Details



Section 7

Independent Students



Section 8

Employee Release



Section 9

Special Support

Section 10

Grants For Dependents

Section 11

Section 11

About your family **n**

a Which parent do you normally live with, or have more contact with?

Mother

Father

or

Both parents

N/A

b What is the current relationship status of this parent?

Single

Living with a partner

Married/civil partnership

Separated **e**

Divorced/dissolved civil partnership **e**

Widowed/surviving civil partner **e**

What you need to do next

Read and sign the **Student Declaration** on **pages 25 and 26** and then pass this form to your parent(s).

What your parent(s) need to do next

The parent(s) you normally live with should complete **section 12**.

If the parent indicated in 'a' is married, in a civil partnership or living with a partner, their partner must also complete **section 12**.



Craig

Must include both parents as based on total household income.



Jennifer

Student is over 25 and single so we do not need any sponsor details.



James

- Student is under 25 and not married so is dependent on sponsor.
- Student may live away from home and may have a partner but must provide mother's details as this was the parent they live with prior to studying.
- As sponsor is single they may be asked to provide marital status evidence.

Section 12

Section 12

Financial details for tax year 2017-18 for parents and partners

Person 1

I have an NI number

Please provide your NI number below:

- -

You are now ready to provide
your financial information.

[go to Part C](#)

Person 2

I have an NI number

Please provide your NI number below:

- -

You are now ready to provide
your financial information.

[go to Part C](#)



Craig

Sponsors must provide income details from 2 financial years ago (prior year).

Sponsor's National Insurance Number will allow us to use the VHI link with HMRC, we may not need physical evidence.



Jennifer

No details to provide.



James

- Sponsor must provide income details from 2 financial years ago (prior year).
- Sponsor's National Insurance Number will allow us to use the VHI link with HMRC, we may not need physical evidence.
- Sponsor may be entitled to a Current Year Income (CYI).

Declaration

Student Declaration **n**

Customer Reference Number

Your full name (in BLOCK CAPITALS)

Your signature (in ink)

Today's date (DDMMYYYY)

 / /

*** E signature for online applications ***

Key take away: Craig

1 Enter passport details on the application.

2 Indicate living at home!

3 Both sponsors need to support the application.

Key take away: Jennifer

1 Must send ORIGINAL non-UK ID evidence.

2 Declare previous study

3 Is over 25 and single, we don't need sponsor details.

Key take away: James

- 1 Complete the ADIF when sending in their birth certificate.

- 2 For CPR we need evidence and impact on study.

- 3 Sponsor single status evidence.



CONTINUOUS IMPROVEMENT

1 The LEAN programme

2 CYI online guidance

3 Connexus

4 CPR and customer journey maps

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