

Means Testing Applications & Bursaries

Stuart Irvine & David Cooper

**Partner Services / Assessing Continuous Improvement
Manager**

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Introduction

Presenters

David Cooper

Assessing Continuous Improvement Manager

Stuart Irvine

Partner Services / Service Manager

Overview

- An overview of the process and the evidence SLC requires for means testing applications. We will also look at exceptions processes and things to remember
- An overview on how Means testing affects Bursary administration and how evidence provided affects eligibility within the Bursary Administration Service portal

Means Tested Assessing

Application type

Household Income

- Means Tested income is based on the total income of all sponsors in the household where the student is living. We also take into account any unearned taxable income the student will earn in the year.

Students under 25

- We require the details of the student's biological/adoptive parents
- Parent's spouse, civil or cohabiting partner (if they live in the household)
- Student's spouses income (Only if the student is married prior to the Academic Year)
- Student unearned taxable income

Students over 25

- Income of spouse, civil or cohabiting partner
- Student unearned taxable income.

GFD/Independent students

- Rules for these students differ slightly
- Please see the other presentations

Applying



Online

- Sponsors are able to provide their details to us via their online account
- Sponsors can still provide their details online at any point, assuming the student has requested a means tested assessment



Paper

- If a student is applying via a paper form, sponsors can provide their details on the student's PN/PR application form
- If the student has already submitted an online application form, sponsors can submit a PFF2 for to provide their details.

Evidence



VHI Checks

- All new sponsors will go through a “Verified Household Income Check” (VHI)
- Sponsor declared details checked with HMRC records
- If there is a variance in this income the sponsor will be asked to provide paper evidence of this income (i.e P60 or tax return)
- If this evidence doesn’t resolve the variance the application will be checked manually with HMRC through a KANA check



Marital Evidence

- All new sponsors and students who are separated or divorced will be required to provide evidence
- This evidence could be a decree absolute/nisi, solicitors letter or current council tax bill showing a 25% discount
- Where possible we will check the sponsor/student details against the electoral roll using Connexus. This will mean no further evidence will be required.

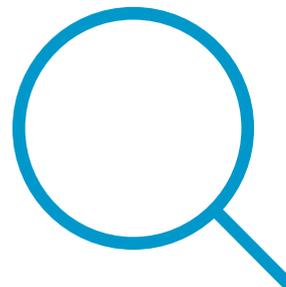
Things to look out for

CYI

- Where a household expects their income will drop by 15% or more, they may be eligible for a “Current Year Income” assessment
- The sponsor provides us with estimated figures of their income which will be finalised with paper evidence at the end of the tax year

Power of attorney

- We would need to see “power of attorney” before we can accept one sponsor to act on the behalf of another



Split applications

- Where another student joins the household, entitlement may increase due to the split of household contribution

Change of sponsor

- Where a student wishes to change sponsors between Academic Years or a new sponsor joins the household, their income will be checked with HMRC



Bursary Administration Service

Household Income

- Household Income is the most commonly used criteria for making Bursary Awards
- Overscale: A student who has a HHI deemed *too high* for core means tested funding can still request to have the assessment carried out as they may still be eligible for a Bursary from the HEP
- FT students in these situations are advised to send in the standard HHI, PFF2 form and a covering letter highlighting that they require the assessment to be carried out for HEP bursary purposes
- SCITT/ITT Awards are not means tested as a standard process



Consent to share

- Student applications will still be assessed until sponsor consent is confirmed
- Independent students may have no sponsor information to provide for various personal reasons:
 - Estranged
 - Independent
- CTS will be removed for AY 19/20 as part of GDPR phase two

Student CTS - Paper Application

Bursary and scholarship data sharing consent will not affect your entitlement to any other financial support available.

You may be eligible for a bursary or scholarship. In order for your university or college to determine and pay any bursary or scholarship to which you may be entitled, we will share some of your personal, financial and course details as well as information about your eligibility for student finance with them. Most universities and colleges will not pay bursaries and scholarships if you do not give consent. **n**

If you **do not** wish your details to be shared for this purpose, please tick this box.

The relevant person(s) you indicated in section 11 must complete section 12 as well as the declaration(s) on page 35. **Please pass this form to them now.**

If you are a single independent student, please turn to page 39 to finalise your application.

Confirmation

Bursaries and scholarships - sharing your information

The student(s) you're supporting might be able to get a bursary or scholarship from their university or college.

We'll share your information with their university or college so they can work out if the student(s) can get any extra financial help from them.

Choosing not to share your information won't affect what the student(s) can get from us.

Share my information with the student's university or college.

Continue

Student Means testing

Evidence Verified

- Student Evidence can be verified by a number of options:
- Self certified
- CYI

Current year Income (CYI)

- Student's who have their household income assessed using a [Current Year Income](#) will have a provisional award, this will be finalised at the end of the tax year
- For each subsequent academic year (AY) the finalised CYI figure is being used to support the application the [Evidence Verified](#) screen be updated to show all finalisation evidence has been received allowing the HEP to assess for a bursary award.

Student Means testing

UK students

- Student Evidence can be verified by a number of options:
- Self certified
- CYI

EU students

- EU means testing require the issue of the EU18B
- This service costs the provider £7.25
- Students are required to have a valid UK bank account

Stuart Irvine

Partner Services / Service Manager – Bursary Administration Service



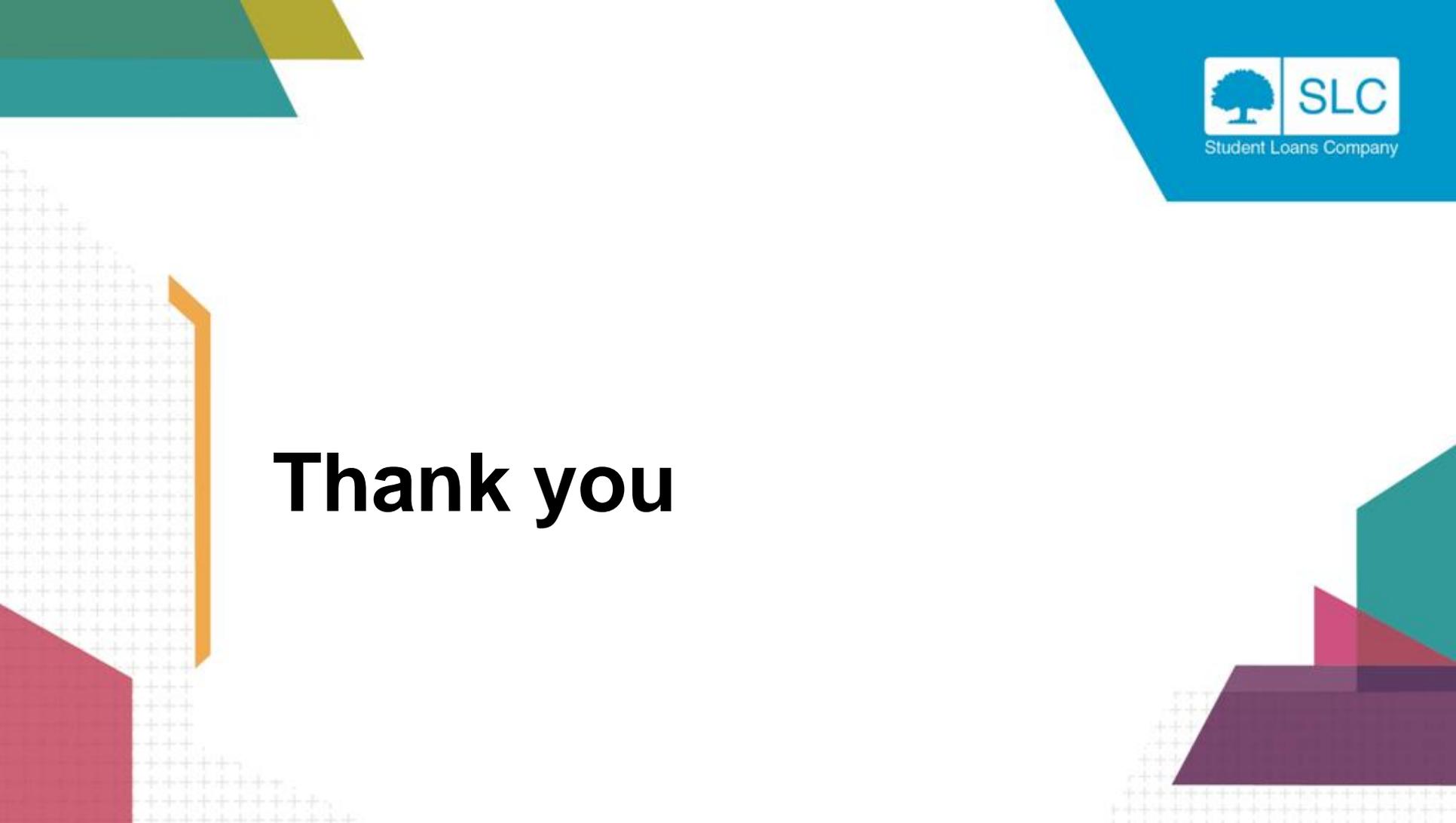
Stuart_Irvine@SLC.co.uk



0141 243 3272 / 07811521502



www.heinfo.slc.co.uk

The slide features several decorative elements: a teal and yellow geometric shape in the top left; a blue triangle in the top right containing the SLC logo; a white grid pattern in the bottom left and bottom right corners; a red shape in the bottom left; a purple and pink shape in the bottom right; and a vertical orange bar on the left side.

Thank you