

Access to Learning Fund

UK Students
2011/12

If you have already applied for financial assistance this academic year you will need to ask for a reassessment form

What is the Access to Learning Fund?

It provides financial help to students

Who:

- fall into hardship unexpectedly or due to personal circumstances
- face difficulties in meeting their living costs

It:

- is designed to ensure all applications are looked at consistently
- has the same application process for all institutions in England within higher education
- is discretionary and is not an automatic entitlement – you should not regard this as guaranteed income

Who can apply?

You can apply today

If you:

- are a registered Home/UK student
- are registered on a full time Undergraduate or Postgraduate course
- are registered on a part-time course which is equivalent to at least half a full time programme
- have taken out the full amount of Student Loan/NHS Bursary you are entitled to (unless registered disabled) and have received the first instalment

Am I likely to receive an award?

We give priority to students

Who:

- have children (especially lone parents)
- are mature students (especially those with existing financial commitments, including priority debts)
- are from low income families
- have entered higher education from care
- are from a Foyer or who are homeless
- are receiving the final year loan rate, and who are in financial difficulty

Other categories of students may also receive awards

The form is available in alternative formats on request

To submit your application please telephone 0191 208 3760 or 0191 222 5679 between the hours of 10.00 am – 4.45 pm to ask for an appointment with the Student Financial Support Team to check through your completed application. YOU MUST bring the requested documentation when you attend your appointment.

About your application:

How is my application assessed?	All awards are entirely at the University's discretion taking account of BIS ALF Guidelines. There is no entitlement to an Access to Learning Fund award or to the allocation of a specific amount.
How do I know my application will be assessed fairly?	BIS guidelines limit the amounts that can be allowed for certain types of expenditure and therefore some specific items of expenditure are capped. For detailed information about the assessment process see: www.ncl.ac.uk/students/wellbeing/finance/funding/ukstudents/hardship/assessment.htm
Can I apply for help with tuition fees?	ALF cannot fund tuition fees. Please contact Tuition Fees on 0191 222 5520 if you are experiencing problems with paying your fees.

For further information about the Access to Learning Fund please see:
www.ncl.ac.uk/students/wellbeing/finance/funding/ukstudents/hardship

Help with completing the form:

- **When completing the form please refer to the instructions opposite each page in order to complete each part of the form accurately.**
- If you need assistance or have any questions while completing the form please contact the Student Financial Support Team on 0191 208 3760 or 0191 222 5679 or send your query via the online web-form which is available at <https://my.ncl.ac.uk/students/contact>
- Inaccurate or incomplete information on your application **will delay** your assessment. Answer all questions relevant to you.
- Ensure that **all relevant requested documentary evidence** is provided along with your form as failure to do this will prevent assessment of your application and delay the outcome.

Part 1: Your personal details

- Ensure that you complete the correct form ie) **you must be classed as a UK student by the University** to be eligible to apply. If you are unsure please contact the telephone number above for clarification of your status while studying.
- Please use the number from your **smartcard** when completing the Student ID number.
- Ensure that you give a very brief explanation of your disability and its effects on your studies if the answer is yes to any of the questions in that section.

Ref Number: _____

Date received: _____

Application for support from the Access to Learning Fund

Academic year 2011/12

For UK Home, Undergraduate, Postgraduate, Full time and Part time students

Your application will only be considered if you answer all relevant sections fully and attach copies of requested documentation. Failure to do so will delay your assessment. Please complete in black ink.

Part 1: Your personal details

Student ID number (9 digits)

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Undergraduate Postgraduate

Surname (in full) _____ Mr / Ms / Mrs / Miss

First name(s) (in full) _____

Nationality _____

Gender Male Female

Date of Birth:

D	D	M	M	Y	Y	Y	Y
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Your age (in years) on 1st Sept 2011 _____ Marital Status: Single Married/living with partner

Address during Semester:

Mobile Phone _____

Email _____

Postcode _____

(the outcome of your assessment will be sent to this email address)

Accommodation

	YES	NO	
Living with your parents or guardian?	<input type="checkbox"/>	<input type="checkbox"/>	
Living with a partner?	<input type="checkbox"/>	<input type="checkbox"/>	
A house owner?	<input type="checkbox"/>	<input type="checkbox"/>	
Living alone in council or private rented accommodation?	<input type="checkbox"/>	<input type="checkbox"/>	
Living in shared accommodation?	<input type="checkbox"/>	<input type="checkbox"/>	If yes, how many live in your house? _____
Living in halls of residence?	<input type="checkbox"/>	<input type="checkbox"/>	Catered <input type="checkbox"/> Self-catered <input type="checkbox"/>
Are you a Foyer resident?	<input type="checkbox"/>	<input type="checkbox"/>	
Are you a care leaver over 18?	<input type="checkbox"/>	<input type="checkbox"/>	

Disability/Medical Conditions

	YES	NO
Do you consider yourself to have a disability or chronic medical condition?	<input type="checkbox"/>	<input type="checkbox"/>
Does this impact on your studies?	<input type="checkbox"/>	<input type="checkbox"/>
If yes to either of above, please explain the nature of your disability/condition	_____	
Have you applied for Disabled Students' Allowances?	<input type="checkbox"/>	<input type="checkbox"/>

Part 2: Your dependants

- Ensure that you list **anyone** financially dependent on you.
- **Do not** include money that you pay to an ex-partner for maintenance. Please enter any such amount in 'Other costs' in Part 9 (Expenditure) with brief description.
- If you use a registered childcare provider (e.g childminder, day nursery, playgroup, out of school club) please provide details of the provider. You will also need to provide evidence from your provider of the childcare costs you expect to incur during the academic year.

Part 3: Programme details

- If you are an over-running student (ie if you have not completed your studies in the usual time for your degree) explain why in Part 10 of the application form.
- If you are an undergraduate or PGCE student and you have chosen not to take out your full entitlement of Student Loan/Maintenance Grant please contact us immediately (see contact details on back of page 1) as you may not be eligible to apply to ALF until you have done so.
- Postgraduates are expected to have funding in place to cover tuition fees and living costs for the academic year. Please explain your reasons in Part 10 of the application form if this is not the case.

Part 2: Your dependants

Do you have any children or adults who are financially dependent on you? YES NO

If yes, how many Please list below:

Name:	Age (if under 18)	Relationship to you	Do they live with you?

Do you use a registered childcare provider? YES NO

Name of childcare provider _____

Is the childcare provider registered with OFSTED? Yes No

If Yes Registration number: _____

Part 3: Programme details

Full time Part-time if part-time, how many credits

Course Title ie BSc, PhD _____ Course Name _____

School (do not abbreviate) _____

Start date of your current programme dd/mm/yy End date of your programme dd/mm/yy

Year of Study: Is this a repeat year? YES NO

1 2 3 4 5 6 Is this your final year?

Are you over-running?

For Full time undergraduates only: Have you taken out your full entitlement from the Student Loans Company?

Is your Student Loan 'financially assessed'?

For Postgraduate Students only: How are your studies financed? _____
(ie self, research council, career development loan, scholarship etc)

Part 4: Access to Learning Fund Payment details

Payments of awards are made by BACS credit transfer. Please give details of the bank account you wish to use for this purpose:

Name of Bank/Building Society	Sort Code (6 digits)	Account Code (8 digits)
	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Tick this box if there are EXCEPTIONAL circumstances whereby a BACS payment directly into your account is NOT suitable for you.

Please explain why:

Part 5: Bank Accounts & Credit/Store cards

- List **all** accounts - **even if you have closed an account or stopped using a particular account** during this academic year.
- If you are living with a partner/married **list all of your partner's accounts and provide 3 months statements** for your partner's account/s as well as your own.
- State the **maximum overdraft limit** agreed with your bank and your **current balance** at the time of handing in your form. Please indicate if this overdraft is interest free.

Part 6: Debts

- Please note that we will not usually take into account money that you owe to family members or friends.
- Student Loans Company debts should not be included.
- List your debts and give details of repayment plans/agreements that have been set-up. Please supply evidence along with your application if you have the documentation available.
- Please note that future commitments are not debts at the time of application.

Part 7: Fees

- If you are unsure of this year's current fee for your course please refer to your entitlement letter, contact Tuition Fees on 0191 222 5520 or send your query via the online web-form which is available at <https://my.ncl.ac.uk/students/contact>
- Where applicable, undergraduate students should have applied for a Tuition Fee Loan before applying for ALF funding. Please explain in Part 10 of the application form if you have not done so.

Part 5: Bank Accounts & Credit/Store cards

Please give details for each account that you (and your partner/spouse, where applicable) hold – even if not used regularly

Name of Bank/Building Society	Account Number	Type of Account	Maximum authorised overdraft facility	Current balance

Credit/Store card	Amount Owing	Account held by:(you/partner/joint)

IMPORTANT: You **MUST** attach the last 3 months bank statements for **ALL** accounts listed above. All transactions over £100 must be briefly explained (annotated) on the copies of the statements you provide.

Part 6: Debts

Please give information on all existing debts (*excluding Student Loans*), including how much is owed and to whom. Provide supporting evidence where applicable.

Priority debts: rent/mortgage arrears, council tax, fines, secured loans, gas and electricity arrears, hire purchase/conditional sale for goods that are essential for you to retain, national insurance contributions, business debts, Tax and VAT.

Non priority debts: Credit card bills, bank overdrafts, personal loans, water bill, family debts, debts to friends.

Priority debt:	Amount Owing	Repayments details:

Non-priority debt:	Amount Owing	Repayments details:

Part 7: Fees

What is the total cost of your tuition fees for this academic year?
(regardless of whether paid by you, your parents, or a fees loan)

£

How much of the above fees are paid by you or/and your parents? (if applicable)

£

Undergraduate and PGCE students only:

How much Tuition Fee Loan have you taken out from the Student Loans Company for your fees? (if applicable)

£

If you have not applied for your full tuition fee loan entitlement who will be paying your fees? (if applicable)

PLEASE WORK OUT YOUR ASSESSMENT PERIOD BEFORE COMPLETING PARTS 8 AND 9 (INCOME AND EXPENDITURE)

Step 1 Use the table below to choose the appropriate assessment period.

Step 2 Calculate each item of income and expenditure relevant to you and enter only the **final figure for your full assessment period** in the table opposite.

Full-time Undergraduate & PGCE Students	All FINAL YEAR and PGCE students on courses less than 45 weeks (including short vacations)	use 39 weeks
	Students with no dependants & course less than 45 weeks (including short vacations) i.e. most undergraduates	use 39 weeks
	Students with dependants & course less than 45 weeks (including short vacations) UNLESS final year (see above)	use 43 weeks
	Students unable to work due to ill health & disability & course less than 45 weeks (including short vacations) UNLESS final year (see above)	use 43 weeks
	Students on courses of 45 weeks or more (including short vacations) e.g. year 4 MBBS, year 4 BDS	use 52 weeks
Full-time Postgraduates (except PGCE)	Doctoral & Masters students	use 52 weeks (or until you have completed studies if this is shorter)
All part-time students	Part-time students	UG - use 39 weeks PG – use 52 weeks

Parts 8 and 9: Income and Expenditure

Please use the contact details on the back of page 1 if you need assistance completing these sections. Inaccurate or missing information will delay your assessment.

Income

Only enter the amount for the FULL academic year not weekly or monthly amounts.

- Use the figures on your entitlement letter from Student Finance England or equivalent assessment authority to enter the correct amounts for any **Statutory Funding** you are receiving (undergraduates & PCGE only).
- Students on **Benefits** should calculate the benefits received over the assessment period only.
- Enter all income (from any source) for your **Partner** (if living together) for the full assessment period.
- Enter all **Savings** that you had **at the beginning** of your academic year (usually September) **not** the sum remaining at the time of submission. *Do **not** enter negative amounts ie overdrafts, credit card debt etc.*
- The Government expects full-time undergraduate students (with the exception of lone parents and those who have a disability or documented illness) to supplement their income by working. We have to include an 'assumed income from work of £1,694 for non-final year students and £565 for final year students within our calculation. However a student's actual earnings from part-time work are disregarded so that they can earn higher sums without affecting an award from the fund.
- For single full-time postgraduate students we have to assume an income of £8,372 per year and where there are dependants or disability this is £6,708 per year. These figures are known as the 'Notional Postgraduate Income' and it is assumed that the student has this sum available from study loans, grants, bursaries, savings and income from working or a combination of these sources.
- Income from non-means tested benefits such as child benefit and disability living allowance are disregarded in the assessment of your ALF application.

IMPORTANT: You MUST calculate each item of income and expenditure over the correct number of weeks. ALL amounts below must show the amount for the FULL period (ie 39, 43 or 52 weeks)
DO NOT ENTER WEEKLY OR MONTHLY AMOUNTS.

Part 8: Income (you/you & your partner)

Money from parents/family (inc tuition fees, living costs)	£
Student Loan	£
Maintenance Grant/Special Support Grant	£
Higher Education Grant (old fees system only)	£
University Bursary	£
NHS Bursary	£
Achievement Bursary	£
Students' Outside Scotland Bursary	£
Scholarship/Grant/Trust/Charity (specify)	£
Professional/Career Development Loan	£
Paid work (after tax, NI etc)	£
Savings	£
PGCE Teacher Training Bursary	£
Parents' Learning Allowance	£
Childcare Grant (full time undergraduates)	£
Adult Dependants Grant	£
Child Benefit	£
Child Tax Credit	£
Working Tax Credit	£
Job seeker's allowance / ESA / Income support	£
Housing/Council Tax Benefit	£
Child Maintenance (from former partner)	£
DSA or similar income (please specify)	£
Disability Benefits (please specify)	£
Partner's Earnings (net) (if co-habit/married)	£
Partner's Income (other than earnings) (please specify)	£
Other Income	£
TOTAL INCOME	£

Part 9: Expenditure (you/you & your partner)

Food*	£
Household consumables* (toiletries, laundry)	£
Clothes & Personal* (ie hair cuts etc)	£
Gas/Electricity/Water (utilities)* (your share)	£
TV Licence* (your share)	£
Internet/Broadband *(your share)	£
Telephone *(Landline)	£
Contents insurance*	£
Socialising/Sport/Entertainment*	£
Mobile Phone*	£
Tuition Fees (paid by you/parent/partner) Not SLC Tuition Fee	£
Accommodation Rent <input type="checkbox"/> Mortgage <input type="checkbox"/> Hall fees <input type="checkbox"/>	£
Medical / Dental / Optical (please circle)	£
Insurance (excluding car & contents please specify.....)	£
Transport - Local	£
Transport - Travel home	£
Car Costs (road tax, fuel, insurance, MOT etc)	£
Course materials (ie books, photocopying, equipment)	£
Compulsory course related field trips	£
Council Tax	£
Disability costs not covered by DSA	£
Essential minimum debt (only enter minimum repayments over academic year)	£
Childcare (use childcare appendix as well when applying for assistance with childcare)	£
Other costs (please specify)	£
TOTAL EXPENDITURE	£

*Included in Composite Living Figure – see notes for more detailed information

Parts 8 and 9: Income and Expenditure Continued

Expenditure

Only enter the amount for the FULL academic year not weekly or monthly amounts.

- When estimating costs for items such as **Food, Household, Clothes and Personal, Mobile Phone and Socialising/Entertainment & Leisure** work out an estimated spend per week and multiply by the number of weeks in your academic year to calculate the amount for your full assessment period.
- Expenditure items marked with an * are figures included in a Composite Living Cost (CLC). The CLC is decided by the government and depending upon your circumstances such as if you are a single student, live with a partner or have children a fixed amount will be used when assessing your application. CLC's ensure that all applications are treated fairly regardless of individual lifestyle choices.
- Mobile phone costs are usually included in the relevant CLC figure but where it is a necessity, such as if you have children, this will not be included in the CLC.
- Accommodation, travel, childcare and course costs will be capped taking into account local rates agreed by the University.
- Please explain any **Compulsory course related field trips** in Part 10 of the form.
- You should include car insurance, maintenance, tax, repairs, MOT and running costs if you own and run a car. Costs associated with travel by car may be accepted as reasonable but only if you can demonstrate that your circumstances (eg young children, disability which affects mobility) mean that you require a car or that travel by car is cheaper for you than public transport. **Normally single students will not be expected to own or run cars.** Special circumstances should be detailed in Part 10 of the form.
- Do **not** enter family debts or full debt repayments in **Essential Minimum Debt**. Only the *minimum* repayments (e.g. interest payments) for any money owed should be entered in this box.
- If you incur childcare costs you **must** ensure that you include an estimate of these costs for your full assessment period as well as evidence from your childcare provider. We will only consider costs incurred with registered childcare providers. Allowable childcare costs will be capped.

Re-applications

Assessments for the Access to Learning Fund are for the full assessment period appropriate to you. **You may re-apply for Access to Learning Funds** even if you have had a previous application turned down, **but you must complete a Re-assessment form** (which is different to this one) and attach supporting documentation to demonstrate a change in circumstances. In addition, where you were not assessed for the full 52 weeks and you experience financial difficulties, you may re-apply for assistance in the summer vacation by completing a Summer Application Form.

Appeals

If you think we have assessed your application incorrectly you can request a review meeting or you can submit an appeal. A review meeting is less formal than an appeal and will give you the opportunity to discuss your application with a member of the Student Finance Support Team. You are strongly encouraged to request a review meeting even if you are submitting an appeal.

If you would like to submit an appeal you will need to complete an appeals form which is available upon request. **You should submit an appeal within one month of receiving your letter of outcome.** You will need to outline the reasons for your appeal and provide relevant supporting documentation. All applications are considered by the Head of the Student Wellbeing Service. **You should note that not liking the original outcome is not grounds for appeal.**

If you need help to prepare an appeal, you may contact the Student Advice Centre for assistance. It would be helpful to take a copy of your original application or personal record with you when you meet your Adviser.

Student Advice Centre:

Tel: 0191 239 3979

Email: student-advice-centre@ncl.ac.uk

STOP STOP STOP STOP.... STOP STOP STOP

Supporting Document Checklist

(please provide *copies* only – originals will not be returned)

The following documents (*that are applicable to you*) **MUST** be supplied with your application – without them your case will **NOT** be assessed.

- All pages** of your Student Finance England (or equivalent) Entitlement letter for 2011/12 Student Loans Company funding (undergraduate & PGCE students only). This document must contain your name for verification purposes. If you cannot find a copy of this document, please either contact your assessment authority or access your on-line student finance account where you can print off another copy.
- Last 3 month's continuous bank statements from ALL the accounts listed in Part 5 (with a brief explanation next to all large or frequent transactions - either deposits or withdrawals - amounting to £100 plus). If print-outs are provided they **must** contain your name and account number.
- Last 3 month's continuous statements for all credit or store cards with a brief explanation next to all large or frequent transactions amounting to £100 plus
- Current signed tenancy/rent agreement for this academic year (relevant pages)
- Evidence of loans, earnings, tax credits or other benefits
- Evidence of Compulsory Field Trips (email/letter from School)
- A letter from your childcare provider detailing the costs you expect to incur during the academic year.
- Birth certificates for all of your children
- NHS Bursary (if applicable)
- Evidence of Professional Career Development Loan/Professional Studies Loan/Research Council or other sponsor documentation relating to funding for your course (Postgraduate students).
- Please ensure that you have included your partner's income and/or earnings in the income column in part 8 and provided evidence of income (where applicable)

CONFIDENTIALITY: Applications are usually only seen by staff in Financial Support. However, it may be necessary for additional supporting information to be sought from other University staff in order for a decision to be reached. On rare occasions where we suspect any illegal or criminal activity such as money laundering we will report this to the University Police.

DECLARATION

I declare that the information provided is accurate and complete to the best of my knowledge having read and accepted the terms and conditions outlined in the information sheet, the application form and guidance notes. I understand that giving false information will automatically disqualify my application and is subject to the University's disciplinary procedure.

Signed

Date

To submit your application please telephone 0191 208 3760 or 0191 222 5679 between the hours of 10.00 am – 4.45 pm to ask for an appointment with the Student Financial Support Team to check through your completed application. YOU MUST bring the requested documentation when you attend your appointment.

CONTACT DETAILS

Access to Learning Fund

Student Financial Support Team, Student Wellbeing Service, King's Gate, Newcastle University, Newcastle Upon Tyne, NE1 7RU Tel: 0191 208 3760 or 0191 222 5679 or send your query via the online web-form which is available at <https://my.ncl.ac.uk/students/contact>