

Further Education Bursary: A guide to providing evidence of household income/benefits

Please read through this document carefully to ensure you provide the financial evidence required, enabling us to set up your bursary without further delay. What we need will vary depending on your household circumstances, see the table below to identify what you will need to provide. Please note that evidence needs to be provided for all adults in the household:

Eligibility criteria	Evidence Required
Claiming benefits only	<ul style="list-style-type: none"> • Benefits letter dated within the current tax year OR • Universal Credit statement ensuring we can see the claimants name and the dates at the top of the statement and covering all the way down to ‘total payment for this month’, including details of entitlements and deductions (if any).
Employed and not claiming benefits	<ul style="list-style-type: none"> • Monthly pay: most recent pay slip OR • Weekly pay: 4 x most recent pay slips
Employed and claiming benefits	<ul style="list-style-type: none"> • Benefits letter dated within the current tax year OR • Universal Credit statement ensuring we can see the claimants name and the dates at the top of the statement and covering all the way down to ‘total payment for this month’, including details of entitlements and deductions (if any) AND • Monthly pay: most recent pay slip OR • Weekly pay: 4 x most recent pay slips
Self-employed and not claiming benefits	<ul style="list-style-type: none"> • Most recent self-assessment tax return as submitted to HMRC. This needs to show your name and address.
Self-employed and claiming benefits	<ul style="list-style-type: none"> • Benefits letter dated within the current tax year OR • Universal Credit statement ensuring we can see the claimants name and the dates at the top of the statement and covering all the way down to ‘total payment for this month’, including details of entitlements and deductions (if any) AND • Most recent self-assessment tax return as submitted to HMRC. This needs to show your name and address.

Retired	<ul style="list-style-type: none"> Confirmation of State pension, P60 for any private pensions and confirmation of pension credit (if applicable).
<p>Under 19 and In Care, a Care Leaver, living independently and claiming Universal Credit or claiming Personal Independence Payments (PIP) AND Universal Credit</p>	<ul style="list-style-type: none"> In Care: A letter from your Social Worker or Local Authority AND household income/benefits evidence. Care Leaver: A letter from your Social Worker or Local Authority AND household income/benefits evidence. Universal Credit: Universal Credit statement ensuring we can see the claimants name and the dates at the top of the statement and covering all the way down to ‘total payment for this month’, including details of entitlements and deductions (if any) AND tenancy agreement or a letter from your temporary accommodation provider. PIP and Universal Credit: Universal Credit statement ensuring we can see the claimants name and the dates at the top of the statement and covering all the way down to ‘total payment for this month’, including details of entitlements and deductions (if any) and letter confirming your PIP award.
<p>Accompanied Asylum Seeking Children and Asylum Seeking adults</p>	<ul style="list-style-type: none"> The application registration card (ARC) AND a copy of the Section 95 support notice.

For your reference, examples of a Universal Credit statement and Tax Credit Award Notice can be found on page 3 and 4 of this guide.

Example 1 - Universal Credit

If you receive Universal Credit, please provide a copy of your most recent statement. If this shows income from employment or self-employment, please provide a copy of the payslip(s) that relate to this pay period/your most recent self-assessment tax return.

GOV.UK Universal Credit John Smith: Sign out

Payments

John Smith
123 Falkirk Street, Falkirk, FK1 1AB

Assessment period: 3 April to 2 May

Your payment this month is

£738

This will be paid by 8pm on 9 May 2019

What you're entitled to

Standard allowance You get a standard amount each month. You said you're single	£317.82
Housing You said that your rent is £422.09 per month	£363.00
Children You get support for 2 children	£508.75
Total entitlement before deductions	£1,189.57

What we take off (deductions)

Take-home pay Take-home pay is what's left after tax, National Insurance and any pension contributions have been deducted.	-£338.05
Earnings reported by your employer	£734.58

The amount we'll use to work out your Universal credit is £734.58

Your total take-home pay for this period is **£734.58**

The first £198.00 of your take-home pay doesn't affect your Universal Credit monthly amount. Every £1.00 you earn in take-home pay over this amount reduces your Universal Credit by 63 pence.

Advances We take money off your payment to repay your advances.	-£33.34
For a list of advances, please refer to your journal .	
Debts and loan repayments Tax Credits recovery	-£79.46
Call 0800 916 0647 to find out more about your debt and loan repayments.	
Total deductions	-£450.85
Your total payment for this month is	£738.72

If your circumstances change

You must immediately [report changes in your circumstances](#) that could affect your Universal Credit payments.

Help and support

[If you think we've made a mistake or want to appeal](#)

[Other support you may be able to get](#)

Example 2 - Tax Credits

If you receive tax credits, please provide scans or photos of ALL pages of your most recent tax credits award letter or tax credits annual review. Please provide the most recent letter. The first page of your tax credits letter should look like the example below, but please provide all pages.

HM Revenue & Customs

MR AND MRS A N OTHER
ADDRESS LINE 1
ADDRESS LINE 2
ADDRESS LINE 3
ADDRESS LINE 4
ADDRESS LINE 5
POSTCODE

ISSUING OFF LINE 1
ISSUING OFF LINE 2
ADDRESS LINE 1
ADDRESS LINE 2
ADDRESS LINE 3
ADDRESS LINE 4
POSTCODE

Online www.gov.uk/managedtaxcredits
Helpline 0345 300 3900
Textphone 0345 300 3909

For our opening hours go to www.gov.uk/contact-hmrc

As Appointee for the claimants named below Date Date of issue

Renew online today at www.gov.uk/managedtaxcredits
once logged in you can access a range of services in your Personal Tax Account.

If you can't renew online, phone us quoting this renewal reference number
999 999 999 999

**Check now,
no later than 31/03/2019**

**Please keep this for your records
This is a copy**

Tax credits – Annual Review for year ended 05/04/2018
Your tax credits award for 06/04/2017 to 05/04/2018

MR A N OTHER National Insurance number OQ 12 34 56 A
MRS A N OTHER National Insurance number OQ 12 34 56 A

We told you that we would be contacting you to review your tax credits award. We want to:

- make sure we paid you the correct amount for the award period shown above, and
- ask you to make a tax credits claim for 2018–2019.

We need you to review your personal circumstances during the whole award period shown above and check your income.

If you need to tell us about anything once you have completed your Annual Review, **please contact us**. If you do not have anything to tell us **you need do nothing more** and you will not receive another notice from us for this year. This TC603R Tax Credits Annual Review is also your Award Notice and the amount of your award is shown below.

We will decide on 31/07/2018 that:

- The first amount of your tax credits award for the period 06/04/2017 to 05/04/2018 is £999999.99. The level of your income meant that your award was reduced to nothing.
- Your tax credits award for 2017–2018 will be as shown in the **Payments** section.

If later, you think those decisions are wrong, you will have 30 days from 31/07/2018 to ask us to look at the decision again. We call this mandatory reconsideration. If you do think something is wrong, you do not have to wait until then to contact us.

Tax credits will gradually be replaced by Universal Credit. You cannot receive tax credits and Universal Credit at the same time. For more information, go to www.gov.uk/universalcredit

You have an overpayment of tax credits. Please see the Overpayment section.

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