

Application notes

About these notes

Use these notes to help you complete your 'Postgraduate Doctoral Loan Application form'.

You can also apply online at www.studentfinancewales.co.uk

How to use these notes



Where you see this in your Postgraduate Doctoral Loan Application form it means there's additional information in these notes to help or advise you.

This could be information about how to complete a question or section or an instruction to send specific supporting documents.

These notes are in sections and numbered in the same way as the questions in the application form.

Read these notes – if you don't answer a question or section correctly or you don't include the documents we need this will delay any payments.

Alternative formats

All of our forms and guides are available in Braille, large print format or audio. If you need these, you can request them by emailing your name, address and details of the format you require to brailleandlargefonts@slc.co.uk or call **0141 243 3686** (this number is only for alternative format requests).

Section 1 Your details

1.1 Change of name

If your name has changed since your passport or birth certificate was issued you need to prove that your name has legally changed.

You need to send us one of the following:

- your change of name deed; or
- your marriage certificate or civil partnership documentation; or
- a final or conditional order; or
- your divorce certificate or dissolution order.

1.5 National Insurance number

We can't pay your full loan until you've given us your National Insurance number.

If you've never been given a National Insurance number, you can leave the National Insurance number box blank and carry on with your application.

We'll contact the Department for Work and Pensions to check your National Insurance number. If you don't have one we'll write to you to advise how to get one.

Alternatively, you can go to

www.gov.uk/apply-national-insurance-number to apply for one.

Section 2 Your previous study

2.2 Qualification gained

If you have a:

- Higher Doctorate (e.g. DLitt, DSc, DTech, LLD, DD, DMus, DMedSc)
- Doctoral degree (e.g. PhD/DPhil, EdD, DBA, DCLinPsy)

you are not eligible to receive a Postgraduate Doctoral Loan.

Section 3 Your postgraduate doctoral course

3.1 A full Postgraduate Doctoral course

If you are using previous study or experience to bypass part of your course and top up to a doctoral degree you can't receive Postgraduate Doctoral loan.

Your course is not a full doctoral degree if it is one of the following:

- Doctorate by publication
- Higher Doctorate

If you are unsure if you are studying a full Postgraduate Doctoral course you should ask your university or college.

3.2 Course applied for

Course duration

You should select the number of years you expect it will take to complete your course. If you need to you can change your course length at a later date.

3.3 Social work bursary

Students are not eligible for a Postgraduate Doctoral Loan if they're in receipt of a social work bursary. If you're unsure if you can apply for this, you need to speak to your university.

If you have applied for this and been rejected you need to send your rejection letter with your application. We can't accept your application without this.

3.4 NHS bursary

Students are not eligible for a Postgraduate Doctoral Loan if they're getting an NHS bursary. If you're unsure if you can apply for this, you need to speak to your university.

3.5 Research Council Funding

Students are not eligible for a Postgraduate Doctoral Loan if they're able to get Research Council Funding. If you're unsure if you can apply for this, you need to speak to your university or college.

Section 3 Your postgraduate doctoral course – continued

3.6 Distance Learning

Are you studying on a distance learning course because you or a member of your family are in the Armed Forces?

If you are not studying distance learning due to you or a family member being in the Armed Forces you must be living in Wales on the first day of your course to be eligible for a Postgraduate Doctoral Loan.

Are you studying on a distance learning course because you or a member of your family are in the Armed Forces?

You may be eligible for support to study a distance learning course if you or your family member is currently serving both in and outside of the UK in one of the following:

- The Naval Service (Royal Navy and Royal Marines)
- The Army
- The Royal Air Force
- The Royal Military Police
- The Gurkhas

The following family members will be eligible students:

- a spouse or civil partner living with a member of the UK Armed Forces serving outside of Wales
- a child, step-child or adoptive child living with a member of the UK Armed Forces serving outside Wales
- a dependant parent living with either;
 - a child who is a member of the UK Armed Forces serving outside of Wales
 - the child's spouse or civil partner who is a member of the UK Armed Forces serving outside of Wales

If you are studying in a different country from where you or your family member are posted you can only get a Postgraduate Doctoral Loan if you study less than half of your course in that country.

What you need to send

You need to send a letter confirming your name and your address, or British Forces Post Office address.

If your family member is in the Armed Forces, you need to send a letter confirming the following:

- their name;
- their address or British Forces Post Office (BFPO) address;
- your name;
- their relationship to you.

The letter you send must be stamped, signed and dated by the Armed Forces Unit Records Officer. We can't accept a photocopy. We recommend that you use your BFPO address for all correspondence.

Section 4 Your residency information

4.1 & 4.2 UK national

You are a UK national if you have a UK passport or are eligible to apply for one.

If you have provided your UK passport details in section 4, you do not need to send any further evidence of your UK nationality.

If it has expired, or is about to expire, you need to send:

- a photocopy of your UK birth or adoption certificate

Armed Forces

If you, your parent(s) or partner are members of the Armed Forces you must apply for student finance in the UK country where you were ordinarily resident when you/they enlisted, unless you are permanently living in another area of the UK.

We can accept certified photocopies of your residency evidence, stamped with your unit stamp. You should use your BFPO address for all correspondence.

4.1.1 Chagossians with British citizenship and their direct descendants

You must be the child, grand-child or other direct descendant of a Chagossian with British citizenship in order to be eligible as a family member.

If you are a Chagossian with British citizenship and don't have a UK passport, you need to send us your original birth certificate. If you're the family member of a Chagossian with British citizenship, you need to send us documents to show that you're a direct descendant. This can be:

- your own original birth certificate
- the birth certificates of parents, grandparents or others you're directly descended from
- change of name deed polls

4.3 Irish citizen

You must send your original ROI passport or national identity card.

If you hold a UK passport, you should provide your passport details in section 4 as you do not need to send further evidence of your nationality.

Section 4 Your residency information – continued

4.4 Family member of a UK national

By family member, you must be the:

- husband, wife, civil partner;
- child, step-child or other direct descendant

of a UK national.

A direct descendant is defined as the biological child, grandchild, great-grandchild and so on, of a person. For example, you are a direct descendant of your mother, your grandmother, your great-grandmother, and so on.

If you answer 'Yes' to this question, you must provide evidence to show you are the family member of a UK national by sending their passport.

You must also send proof of your relationship to the UK national.

This may be:

- your marriage or civil partnership certificate; **or**
- a birth certificate showing your name and the UK national's name; **and**
- the marriage or civil partnership certificate if you are a step-child.

If you are a child, step-child or other direct descendant of a UK national, you must be under 21 or dependent on the person or the person's spouse or civil partner.

You need to give us some details about your identity and residency at question **4.26**.

Section 4 Your residency information – continued

4.5 Family member of an Irish citizen

By family member, you must be the:

- husband/wife/civil partner;
- parent/step-parent or other direct ascending line relative;
- child, step-child or other direct descendant of an Irish citizen.

A direct descendant is defined as the biological child, grandchild, great-grandchild and so on, of a person. For example, you are a direct descendant of your mother, your grandmother, your great-grandmother, and so on.

A direct relative in the ascending line is defined as the biological parent, grandparent, great-grandparent and so on, of a person. You are a direct relative in the ascending line of your child, grandchild, great-grandchild, and so on.

If you are a child, step-child or other direct descendant you must be under 21 or dependent on the Irish citizen family member.

If you have EU Settlement status and have been in the UK, the EEA, Switzerland or the Overseas Territories for three years, direct ascending line relatives of Irish citizens are eligible.

You must provide evidence to confirm your family member is an Irish citizen and your relationship to them by sending their original ROI passport or national identity card and your birth, marriage or civil partnership certificate (if this shows proof of their Irish citizenship and your relationship to them).

You need to give us some details about your identity and residency at question **4.26**.

Section 4 Your residency information – continued

4.6 Family member of a person of Northern Ireland

By family member, you must be the:

- husband/wife/civil partner;
- parent/step-parent or other direct ascending line relative;
- child, step-child or other direct descendant of a person of a person of Northern Ireland.

If you are a child, step-child or other direct descendant you must be under 21 or dependent on the Irish citizen family member.

A direct descendant is defined as the biological child, grandchild, great-grandchild and so on, of a person. For example, you are a direct descendant of your mother, your grandmother, your great-grandmother, and so on.

A direct relative in the ascending line is defined as the biological parent, grandparent, great-grandparent and so on, of a person. You are a direct relative in the ascending line of your child, grandchild, great-grandchild, and so on.

If you have been in the UK and Islands for three years and the person of Northern Ireland was in the UK, direct ascending line relatives of the person of Northern Ireland are not eligible.

If you have EU Settlement status and have been in the UK, the EEA, Switzerland or the Overseas Territories for three years, direct ascending line relatives of the person of Northern Ireland are eligible.

You must provide evidence to confirm your family member is a person of Northern Ireland and your relationship to them by sending their original ROI or UK passport or and your birth certificate, marriage or civil partnership certificate that shows your relationship to them.

You need to give us some details about your identity and residency at question **4.26**.

Section 4 Your residency information – continued

4.7 Settled or pre-settled status under the EU Settlement Scheme

If you're an EU national

You need to give us some details about your identity and residency at question **4.26**.

If you're the family member of an EU national

You must also send proof of your relationship to the EU national.

You need to give us some details about you and your family member's identity and residency at question **4.27**.

The specified British Overseas Territories are:

- Anguilla;
- Bermuda;
- British Antarctic Territory;
- British Indian Ocean Territory;
- British Virgin Islands;
- Cayman Islands;
- Falkland Islands;
- Gibraltar;
- Montserrat;
- Pitcairn, Henderson, Ducie and Oeno Islands;
- South Georgia and the South Sandwich Islands;
- St Helena, Ascension Island and Tristan da Cunha; and
- Turks and Caicos Islands.

You must be attending or undertaking a course in Wales to qualify.

Section 4 Your residency information – continued

4.8 EU national, family member of an EU national who is a resident in Gibraltar

By family member, you must be the:

- husband/wife/civil partner;
- parent/step-parent or other direct ascending line relative;
- child or step-child or other direct descendant (must be under 21 years of age or dependent on the EU national) of an EU national who is a resident in Gibraltar.

A direct descendant is defined as the biological child, grandchild, great-grandchild and so on, of a person. For example, you are a direct descendant of your mother, your grandmother, your great-grandmother, and so on.

A direct relative in the ascending line is defined as the biological parent, grandparent, great-grandparent and so on, of a person. You are a direct relative in the ascending line of your child, grandchild, great-grandchild, and so on

If you're an EU national

You need to give us some details about your identity and residency at question **4.26**.

If you're the family member of an EU national

You must also send proof of your relationship to the EU national.

You need to give us some details about you and your family member's identity and residency at question **4.27**.

4.9 Family member of a UK national who is resident of Gibraltar

By family member, you must be the:

- husband/wife/civil partner;
- child or step-child or other direct descendant (you must be under 21 or dependent on the UK national) of a UK national who is a resident in Gibraltar.

A direct descendant is defined as the biological child, grandchild, great-grandchild and so on, of a person. For example, you are a direct descendant of your mother, your grandmother, your great-grandmother, and so on.

If you're a UK national, you must send your original UK passport, or original UK birth or adoption certificate. If you're the family member of a UK national, you must:

- send your valid passport, or original birth or adoption certificate;
- provide evidence to confirm your family member is a UK national; **and**
- prove your relationship to your UK national family member by sending their original UK passport, or original UK birth or adoption certificate and your birth certificate or marriage certificate (if this shows proof of their UK nationality and your relationship to them).

You need to give us some details about your identity and residency at question **4.26**.

Section 4 Your residency information – continued

4.10 Child of a Swiss national

To get student finance as a child of a Swiss national, your parent or step-parent must have settled or pre-settled status through the EU Settlement Scheme, and be resident in the UK on the first day of the academic year. You must have settled or pre-settled status and be ordinarily resident in the UK, the EEA, Switzerland or the Overseas Territories for the three years prior to the first day of your first academic year.

Go to the residency history section on page 20 to find out when your academic year starts.

To get student finance as the child of a Swiss national, your Swiss national parent must be resident in the UK on the first day of the academic year. We need a signed letter from your Swiss national parent stating their UK address, and that they live there on the first day of the academic year.

They must also send one of the following documents:

- bank statement
- payslip
- tenancy agreement/mortgage statement
- utility bill
- local authority correspondence
- government department correspondence

You need to give us some details about you and your family member's identity and residency at question **4.27**.

Section 4 Your residency information – continued

4.11 EEA or Swiss national worker

You need to give us some details about your identity and residency at question **4.26**.

You need to send:

- a completed Postgraduate Doctoral Loan UK Employment Status form

The Postgraduate Doctoral Loan UK Employment Status form is available to download at

www.studentfinancewales.co.uk/pgfinance

Complete and return this additional form with any supporting documents along with your main application form to ensure that your funding can be in place as soon as possible.

If you can't return your additional form with your main application form, get it to us as soon as possible. We won't be able to confirm if you can get Postgraduate Doctoral Loan without this additional completed form.

4.12 Family member of a European Economic Area (EEA) national or Swiss national

Please note - children, step-children, other direct descendants or direct ascending line family members only apply to EEA worker family members.

By family member, you must be the:

- husband, wife, civil partner;
- parent, step-parent (only applicable to EEA worker family members);
- child or step-child
- other direct descendant (only applicable to EEA worker family members)

of the EEA or Swiss national.

A direct descendant is defined as the biological child, grandchild, great-grandchild and so on, of a person. For example, you are a direct descendant of your mother, your grandmother, your great-grandmother, and so on.

A direct relative in the ascending line is defined as the biological parent, grandparent, great-grandparent and so on, of a person. You are a direct relative in the ascending line of your child, grandchild, great-grandchild, and so on. Other family relationships are excluded from the definitions above.

If you're the person working

You need to give us some details about your identity and residency at question **4.26**.

If you're the family member of the worker

You need to send evidence of your relationship to the person who holds the status if it is not you.

You need to give us some details about you and your family member's identity and residency at question **4.27**.

Section 4 Your residency information – continued

4.12 Family member of a European Economic Area (EEA) national or Swiss national (continued)

You need to send:

- a completed Postgraduate Doctoral Loan UK Employment Status form

The Postgraduate Doctoral Loan UK Employment Status form is available to download at

www.studentfinancewales.co.uk/pgfinance

Complete and return this additional form with any supporting documents along with your main application form to ensure that your funding can be in place as soon as possible.

If you can't return your additional form with your main application form, get it to us as soon as possible. We won't be able to confirm if you can get Postgraduate Doctoral Loan without this additional completed form.

4.13 Child of a Turkish worker who is working in the UK

To apply for a loan as the child of a Turkish worker, your Turkish parent must be working in the UK on the first day of your course.

You must also be living in the UK on the first day of the first academic year of your course and have lived in the UK, the EEA, Turkey, Switzerland or Overseas Territories for 3 years before the start of your course.

You need to give us some details about you and your family member's identity and residency at question 4.27.

You need to send us proof of your relationship, send us:

- a birth, marriage or civil partnership certificate

You also need to send proof of your Turkish parent's employment in the UK, for example send us:

- a contract of employment

And you also need to send your Turkish parent's proof of the extension of their Leave to Remain in the UK after 31 December 2020 from the Home Office.

All evidence items you send must be **originals**.

Section 4 Your residency information – continued

4.14 The Afghan Relocations and Assistance Policy (ARAP), the Afghan Citizens Resettlement Scheme (ACRS) or the Afghanistan Response Route (ARR).

If you were granted this leave

You need to give us some details about your identity and residency at question **4.28**.

Expiry date

If you were granted this status without an expiry date you should mark the expiry date box as N/A (not applicable).

If your family member was granted this leave

You need to send evidence of your relationship to the person who holds the status if it is not you.

Expiry date

If your:

- husband, wife, civil partner; or
- parent(s), step-parent

were granted this status without an expiry date you should mark the expiry date box as N/A (not applicable).

You need to give us some details about you and your family member's identity and residency at question **4.29**.

Afghan Locally Employed Staff Ex-Gratia Scheme

This scheme was for previous employees of the UK government who resigned or were made redundant from their post. Afghan nationals relocated to the UK under this scheme are not eligible for a Postgraduate Doctoral Loan.

4.15 Settled status not granted under the EU Settlement Scheme

'Settled status' means that you can live in the UK permanently without the Home Office placing any restrictions on how long you may remain.

You are free from any restriction if any of the following apply:

- You are a British citizen
- You have been granted indefinite leave to enter or remain.
- You have a right of abode in the UK.

Further information about immigration issues can be obtained from the Home Office.

You need to give us some details about your identity and residency at question **4.26**.

Section 4 Your residency information – continued

4.16 Family member of a person with settled status in the UK

By family member, you must be the:

- husband, wife, civil partner;
- child, step-child or other direct descendant (you must be under 21 or dependent on the person with settled status) of a person with settled status in the UK.

‘Settled status’ means that your family member can live in the UK permanently without the Home Office placing any restrictions on how long you may remain.

They are free from any restriction if any of the following apply:

- your family member is a British citizen.
- your family member has been granted indefinite leave to enter or remain.
- your family member has a right of abode in the UK.

You need to give us some details about you and your family member’s identity and residency at question **4.27**.

4.17 Limited leave to enter or remain under a Ukraine Scheme

If you were granted this leave

You need to give us some details about your identity and residency at question **4.28**.

If your family member was granted this leave

You need to send evidence of your relationship to the person who holds the status if it is not you.

You must have been the spouse or civil partner of the person with leave on the date of the leave application.

If you’re the child or step-child of the person with leave, you must have been the child or step-child on the date of leave application, and also under the age of 18 on that date.

You need to give us some details about you and your family member’s identity and residency at question **4.29**.

Section 4 Your residency information – continued

4.18 Refugee status

You need to send evidence of your relationship to the person who holds the status if it is not you.

If you are claiming student finance as the child or step-child of someone who has been granted this status, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming student finance as the husband, wife or civil partner of someone who has been granted this status, you must have been their husband, wife or civil partner at the time of their application.

Expiry date

If you or your:

- husband, wife, civil partner; **or**
- parent(s), step-parent

were granted this status without an expiry date you should mark the expiry date box as N/A (not applicable).

If you were granted this leave

You need to give us some details about your identity and residency at question **4.28**.

If your family member was granted this leave

You need to give us some details about you and your family member's identity and residency at question **4.29**.

Section 4 Your residency information – continued

4.19 Humanitarian Protection

You need to send evidence of your relationship to the person who holds the status if it is not you.

If you are claiming student finance as the child or step-child of someone who has been granted this status, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming student finance as the husband, wife or civil partner of someone who has been granted this status, you must have been their husband, wife or civil partner at the time of their application.

Expiry date

If you or your:

- husband, wife, civil partner; **or**
- parent(s), step-parent

were granted this status without an expiry date you should mark the expiry date box as N/A (not applicable).

If you were granted this leave

You need to give us some details about your identity and residency at question **4.28**.

If your family member was granted this leave

You need to give us some details about you and your family member's identity and residency at question **4.29**.

4.20 Stateless Person

You need to send evidence of your relationship to the person who holds the status if it is not you.

If you are claiming student finance as the child or step-child of someone who has been granted this status, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming student finance as the husband, wife or civil partner of someone who has been granted this status, you must have been their husband, wife or civil partner at the time of their application.

Expiry date

If you or your:

- husband, wife, civil partner; **or**
- parent(s), step-parent

were granted this status without an expiry date you should mark the expiry date box as N/A (not applicable).

If you were granted this leave

You need to give us some details about your identity and residency at question **4.28**.

If your family member was granted this leave

You need to give us some details about you and your family member's identity and residency at question **4.29**.

Section 4 Your residency information – continued

4.21 Leave to enter or remain

You need to send evidence of your relationship to the person who holds the status if it is not you.

If you are claiming student finance as the child or step-child of someone who has been granted this status, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming student finance as the husband, wife or civil partner of someone who has been granted this status, you must have been their husband, wife or civil partner at the time of their application.

Expiry date

If you or your:

- husband, wife, civil partner; **or**
- parent(s), step-parent

were granted this status without an expiry date you should mark the expiry date box as N/A (not applicable).

If you were granted this leave

You need to give us some details about your identity and residency at question 4.26.

If your family member was granted this leave

You need to give us some details about you and your family member's identity and residency at question 4.27.

4.22 Indefinite leave to remain as a victim of domestic violence or abuse

You need to send evidence of your relationship to the person who holds the status if it is not you.

If you are claiming student finance as the child or step-child of a person granted indefinite leave to enter or remain as a victim of domestic violence, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you were granted this leave

You need to give us some details about your identity and residency at question 4.28.

If your family member was granted this leave

You need to give us some details about you and your family member's identity and residency at question 4.29.

Section 4 Your residency information – continued

4.23 Section 67 of the Immigration Act 2016

You need to send evidence of your relationship to the person who holds the status if it is not you.

If you are claiming student finance as the dependent child or step-child of a person granted leave to remain in the UK under Section 67 of the Immigration Act 2016, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

You need to give us some details about your identity and residency at question **4.28**.

4.24 Calais leave

You need to send evidence of your relationship to the person who holds the status if it is not you.

You need to give us some details about your identity and residency at question **4.28**.

4.25 Bereaved Partner

You need to send evidence of your relationship to the person who holds the status if it is not you.

If you are claiming student finance as the child or step-child of a person granted indefinite leave to enter or remain as a bereaved partner, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you were granted this leave

You need to give us some details about your identity and residency at question **4.28**.

If your family member was granted this leave

You need to give us some details about you and your family member's identity and residency at question **4.29**.

Section 5 Your address history

5.1 & 5.2 Residency status

You should provide your address details from the point your status was granted or up to a maximum of three years before the start of the academic year if your status was granted prior to that point.

Date study begins between	Date academic year begins
1 August until 31 December inclusive	1 September
1 January until 31 March inclusive	1 January
1 April until 30 June inclusive	1 April
1 July until 31 July inclusive	1 July

Section 8 Loan Declaration

Power of Attorney

If you cannot sign the form it must be signed on your behalf by your attorney. The Power of Attorney letter must be sent with the application before a signature from that attorney will be accepted.