

ALG Application Form Resource Pack 2010/11



Young People's
Learning Agency



ALG Application Form Resource Pack

Introduction

This document provides practical advice on completing an application for ALG in the 2010/11 Academic Year.

The information contained in this document is correct at the time of publication but may be subject to change.

Please note that this pack is designed to answer basic queries. For detailed queries that are not addressed in this pack or the Application Form Guidance Notes, please advise the applicant or their spouse or partner (if they have one) to contact the Learner Support Helpline on **0800 121 8989**.

Should an applicant require assistance completing the 2009/10 (Orange) application form, then they should contact the Learner Support Helpline on **0800 121 8989** for further advice.

The following abbreviations appear throughout this document and have the meaning described:

ALG	Adult Learning Grant
LSS	Learner Support Service
TCAN	Tax Credit Award Notice
DWP	Department for Work and Pensions
YPLA	Young People's Learning Agency for England

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Section 1: Walkthrough of a 2010/11 ALG Application Form

Introduction

This section provides advice on how to complete the 2010/11 ALG Application Form, it contains:

- A high level walkthrough of each page of the Application Form highlighting all of the mandatory fields that must be completed.
- Additional information on completing each section.
- General advice on who should complete which parts of the Application Form.

Please note that this pack is designed to answer basic queries. For detailed queries that are not addressed in this pack, or the Application Form Guidance Notes, please advise the applicant to contact the Learner Support helpline on **0800 121 8989**.

Applying for ALG - An Introduction

Applicants for ALG should read this page before applying

Eligible Learner

- you must be aged 19 years or over to receive ALG, though you can apply 1 month before your 19th birthday
- you will be assessed on your income for the previous tax year (2009-10). You must earn **£19,513 or less** if you are single or earn **£30,810 or less** if you are married or live with a partner as if you are married. We will not assess your parents' income for ALG even if you live with them
- you must have been ordinarily resident in England for 3 years prior to the start of your course.

If you get ALG, you **could** also receive:

Help with hardship, childcare and residential costs, a Professional and Career Development Loan, Free Childcare for Training and Learning for Work, Carer's Allowance, Housing Benefit, Council Tax Benefit, Tax Credits and Child Benefit

You **cannot** receive ALG if you currently receive one of the following benefits:

- Jobseeker's Allowance, Incapacity Benefit, Income Support or Employment and Support Allowance (ESA)
- you must sign off the above benefits before you can get ALG.

You **cannot** receive ALG if:

- you are currently on New Deal, an Apprenticeship or a Programme Led Apprenticeship (PLA)
- you are receiving Education Maintenance Allowance (EMA).

If you are in prison or a Young Offenders Institution or have been released on temporary licence (ROTL) you are **not eligible** to receive ALG. You may apply for the scheme while serving your sentence but only if your release date is known. You must provide release papers when you apply for ALG. If you have been released or remain under supervision in the community (such as electronic tagging) you can apply for ALG.

You must have your own Bank or Building Society account that accepts BACS payments as this is how your ALG will be paid.

Eligible Learning

- you must be learning full time, this means a course with an average of 12 hours of guided study per week (this includes practical work, where applicable) throughout its duration (usually over an academic year)
- you must be studying for your **first** full Level 2 or **first** full Level 3 qualification:
 - a full Level 2 qualification **could** be 5 GCSE's at A* to C or an NVQ Level 2 or equivalent. A full Level 3 **could** be 2 A Levels, or an NVQ Level 3 or equivalent. Further information on qualification eligibility for ALG is provided in pages 12-13 of the Guidance Notes
- you must be studying at a Learning Provider in England funded by the Chief Executive of Skills Funding
- you cannot receive ALG if you are studying at a Learning Provider in Wales or Scotland
- your course must start or continue between the dates 30/08/10 and 28/08/11
- Apprenticeships and Programme Led Apprenticeships are not eligible for ALG.

Send your completed form and evidence to us as soon as you can. You are encouraged to send photocopies but these **must** be clear and complete. **Original evidence** will be returned to you when we have processed the application.

If we receive your application within 28 days of you starting your learning programme, you may be entitled to receive payments from the start of your learning programme. **ALG payments cannot be made until you give your Notice of Entitlement (NoE) to your Learning Provider and they have checked that you are on an eligible course for ALG provision.** See pages 4-5 of the Guidance Notes.

Filling in this form

To help you, brief notes are given at each question and more help is available in the Guidance Notes.

- Fill in the form using **BLACK INK** and in **BLOCK CAPITALS**
- You can also call us for more help on **0800 121 8989** between 07:00 and 20:00 Monday to Friday
- Alternatively, visit our website www.direct.gov.uk/alg

This application pack contains:

- An Application Form: Learner Details (Part A), Income Details (Part B) and Income Details, Benefits (Part C)
- Guidance Notes to help you fill in this form
- Pre-paid envelope

Each Application Form contains a covering letter, giving an introduction to the scheme (which does not need to be completed or returned) and three distinct parts:

Part A of the form is for the applicant's details and must be completed in **all** cases.

Part B should be completed by the applicant and their spouse or partner (if they have one) to show their Income Details.

Part C should only be completed if the applicant's household was in receipt of DWP benefits.

Where the applicant needs further assistance in completing the form, the onus should be on the applicant or their spouse or partner (if they have one) to contact the helpline on **0800 121 8989**.

Applying for ALG – An Introduction

The introduction sheet contains invaluable information on ALG eligibility – the applicant and their spouse or partner (if they have one) should read this document carefully before completing the Application Form.

The definition of full-time learning has changed slightly to the information given here and the definition of full-time learning is at least 450 guided learning hours during the 2010/11 academic year.

Navigation of the form:

Black boxes on the form provide guidance and advise which sections of the form the applicant should complete.

Purple bordered boxes on the form provide additional information and guidance and are a good starting point for further advice when completing the form. To support this information, there are the Guidance Notes which are enclosed in the application pack, and the Learner Support helpline can be contacted on **0800 121 8989**.

Red bordered boxes provide clear concise instructions about completing the form.

ALG 2010/11

Learner Details Application for Adult Learning Grant
ALG Year 30/08/10 - 28/08/11

ALG
ADULT LEARNING GRANT

Learner Details (Part A) - to be filled in by the Applicant

If we posted this form to you and your details are printed above and **are correct**, you **do not** need to fill in questions A1 to A3. If **any** of those details are wrong, fill in questions A1 to A3 in **full**.

A1 - Your Name

Surname / Family Name:

First Name(s):

A2 - Your Date of Birth

You must be aged 19 or over - see page 4 of the Guidance Notes for details.

A3 - Your Home Address

House No. / Flat No. / Name:

Street / Road:

Town / City:

County:

Postcode:

A4 - Your Contact Details

Email Address:

Home phone:

Mobile phone:

How would you like us to contact you?

Email Home phone Mobile phone Post

For office use only:

Evidence returned

Scheme number

Recipient

ALG 1

Part A: To be filled in by the Applicant

Questions in Part A capture the applicant's personal details – the information requested should be completed fully wherever possible.

The Application Form may have pre-populated details at the top of Page 1.

When the form does not have any pre-populated details at the top of this page, the applicant **must** complete Questions A1 – A3 of the form.

Questions A1, A2 and A3 must be completed when there are no pre-printed details at the top of Page 1, or these details are incorrect.

The applicant must be aged 19 or over at the start of their course, although they can apply one month before their 19th birthday.

Applicants should be of working age to be eligible for ALG, which the DWP defines as aged 65 or under. If the applicant is over 65, please call us on **0800 121 8989**.

Question A4 is not a mandatory field; however, contact details for the applicant can be invaluable should the application require further attention e.g. additional evidence. This question also allows the applicant to select their preferred contact method; if this question is not completed, all contact will be via post.

For office use only - this section is for internal use by the Learner Support Service, please **do not** complete or mark this part of the form.

ALG 2010/11

A5 - Equal Opportunities Monitoring (see Guidance Notes)

Are you: Male Female Prefer not to say

Do you consider yourself to have a disability? Yes No Prefer not to say

How would you describe your ethnic origin?

White	Black or Black British	Chinese or other ethnic group
<input checked="" type="checkbox"/> British	<input checked="" type="checkbox"/> African	<input checked="" type="checkbox"/> Chinese
<input checked="" type="checkbox"/> Irish	<input checked="" type="checkbox"/> Caribbean	<input checked="" type="checkbox"/> Any Other
<input checked="" type="checkbox"/> Any other white background	<input checked="" type="checkbox"/> Any other black background	
Mixed	Asian or Asian British	
<input checked="" type="checkbox"/> White and black Caribbean	<input checked="" type="checkbox"/> Indian	<input checked="" type="checkbox"/> Prefer not to say
<input checked="" type="checkbox"/> White and black African	<input checked="" type="checkbox"/> Pakistani	
<input checked="" type="checkbox"/> White and Asian	<input checked="" type="checkbox"/> Bangladeshi	
<input checked="" type="checkbox"/> Any other mixed background	<input checked="" type="checkbox"/> Any other Asian background	

A6 - How did you first hear about the scheme(s) you are applying for?

<input checked="" type="checkbox"/> Internet	<input checked="" type="checkbox"/> Bus / banner advert	<input checked="" type="checkbox"/> Press adverts	<input checked="" type="checkbox"/> Your Learning Provider
<input checked="" type="checkbox"/> Radio	<input checked="" type="checkbox"/> Leaflets or posters	<input checked="" type="checkbox"/> Connexions	<input checked="" type="checkbox"/> nextstep
<input checked="" type="checkbox"/> Television	<input checked="" type="checkbox"/> Friend or family	<input checked="" type="checkbox"/> Support worker	<input checked="" type="checkbox"/> Careers Adviser

A7 - Your Bank or Building Society account details

To receive payments, you must normally have a bank account in your own name that will accept BACS payments. If you do not have a bank account, you need to open one first and then fill in this form when you have the information we need. In some circumstances where a learner is unable to administer their own account, special arrangements may apply. Call us on **0800 121 8989** if this applies. See page 7 of the Guidance Notes.

Full Name of Account Holder:

This should be the name as it appears on your cash or debit card, or statement.

Name of Bank / Building Society:

Branch:

Sort Code: - -

Account Number:

Your account number may not be the same as the cash or debit card number; you can find it on a bank or building society statement. Most account numbers are 8 digits long. If you are unsure, your bank or building society can advise you.

Roll Number:

If you have given details of a building society account, enter the roll or reference number (if applicable). Enter this exactly as it appears on your statement and include any hyphens (-) or slashes (/) that are shown as part of the number.

You must enclose an account statement, letter or form from your bank or building society that shows your name, sort code, account number, roll number (if applicable) and home address. You are encouraged to send us a clear and complete photocopy, see page 7 of the Guidance Notes. If for some reason the address is different from the address on your application form, tell us why.

ALG 2010/11

Question A5 Equal Opportunities Monitoring is not a mandatory field.

The answers given here will have no bearing on the applicant's eligibility for ALG; the marking of the boxes will be used for survey purposes and to ensure that we are reaching all sections of the community.

Question A6 – How did you hear about ALG? Mark one box only is not a mandatory field

The answers given here will have no bearing on the applicant's eligibility for ALG; the marking of the boxes will be used for survey purposes.

- Question A7** captures the applicant's bank or building society details.
- The account should be in the applicant's name (if this is not possible due to special circumstances such as a disability, the applicant or their spouse or partner (if they have one) should contact the Learner Support helpline for additional advice on **0800 121 8989**).
 - Appropriate evidence of a valid bank account is required to verify the details the applicant gives in this question. This evidence can be a bank statement, a letter from the bank or the 'Confirmation of Bank / Building Society Account Form' which can be found on the back of the Guidance Notes; this should be completed by the applicant's bank or building society.
 - The applicant should be encouraged to send photocopies of their evidence**, but these must be clear and complete. If they send original documents we will return them to the applicant when we have processed their application.
 - We do not accept Post Office Card Accounts – as they will not accept BACS transfers from ALG.

Learning Details

A8 - Residency - mark one box only

You must complete this section. In case of difficulties see pages 8-11 of the Guidance Notes included in this application pack or call us on 0800 121 8989

- A I am a British Citizen and have lived in England for at least three years prior to the start of my learning programme. See page 8 of the Guidance Notes.
- B I have 'settled status' in the UK and have been ordinarily resident in England for at least three years prior to the start of my learning programme.
 *'Settled' means having either indefinite leave to enter or remain (ILE/R), or having right of abode in the UK. For more information about 'settled status' see page 8 of the Guidance Notes.
- C I am a EU national (including Gibraltar) or the spouse or civil partner or child of an EU national, and have been ordinarily resident in England for at least three years prior to the start of my learning programme.
- D I am a European Economic Area (EEA) national who is a worker, has worked or is looking for work in England or the spouse, civil partner or child of an EEA national who is a worker, has worked or is looking for work in England, and I have been ordinarily resident in England for at least three years prior to the start of my learning programme. If you are a Swiss national or the spouse or civil partner or child of a Swiss national, or a Turkish worker or the spouse or civil partner or the child of a Turkish worker, see page 8 of the Guidance Notes.
- E I have been granted 'refugee status' by the UK Government, or I am the spouse, civil partner or child of someone with 'refugee status' or have been granted Humanitarian Protection, or have EU Temporary Protection and live in England.
- F None of the above

Now go to A9 on next page

Question A8 – is mandatory. The applicant should indicate which residency condition best suits their circumstances and answer the question accordingly. **Mark one box only.**

If the applicant is a British Citizen, they should mark Box A only; they will have completed this question and should move onto Question A9 on the next page.

If the applicant is not a British Citizen, further information on Residency Conditions is available on Pages 8 – 11 of the Guidance Notes that accompany the Application Form and additional advice can be obtained from the Learner Support helpline on **0800 121 8989**.

Income Details

Office use only
Ref. number:

Income Details (Part B)

About you

We need the income and personal details for you and your spouse or partner (if you have one) for the tax year **6 April 2009 to 5 April 2010** to assess your application. For the rest of this form, we will refer to you as the 'Applicant', and we may refer to your spouse or partner as 'Partner'.

B1 - Are you married, in a civil partnership or living with someone as if you are married?

- Yes No
- If you answered **YES**, we need to know about your spouse or partner's income as well as your own. Go to **B2**.
- If you answered **NO**, go to **B3**.

B2 - Spouse or Partner's Details

Surname / Family Name:

First Name(s):

Relationship to Applicant: Spouse Partner

B3 - B11 are about Income Details - These **must** be for the **2009-10 tax year (6 April 2009 to 5 April 2010)**. You need to tell us about your income and that of your spouse or partner (if you have one). We do not need to know about your parents' income if you are still living with them. If your current income or that of your spouse or partner (if you have one) is lower than in the 2009-10 tax year due to disability, as defined by the Disability Discrimination Act, see pages 15-16 of the Guidance Notes for further information. Before you complete questions B3 to B11 of the application, see pages 16-24 of the Guidance Notes for help on what income you need to include in each box. State the amount you received and send us the evidence requested where we have asked for it (**round your answers down to the nearest pound and do not include pence**). You are encouraged to send us photocopies but they **must** be clear and complete. **Original documents** will be returned when we have processed the application.

B3 - Do you have a Tax Credit Award Notice (form TC602) that correctly states your income and that of your spouse or partner (if you have one) for the tax year 2009-10?

Before you answer this question read the information about Tax Credit Award Notices on pages 16-17 of the Guidance Notes.

No Yes

Write in your total income, as shown on the Tax Credit Award Notice. Round down to the nearest pound. Do **not** show pence. For example: £ 1 5 0 0 0

Go straight to B4.

Go straight to B12. Do not fill in any more questions in Income Details (Part B). Do not fill in Income Details, Benefits (Part C). You have completed your application. You must enclose your Tax Credit Award Notice with your application.

Part B: To be completed by the applicant and their spouse or partner (if they have one).

This section of the Application Form captures the income details for the **tax year 2009-10**.

If the applicant is unsure which sections they should complete or what evidence they should send, they must be advised to contact the Learner Support helpline on **0800 121 8989** to determine what additional information or evidence would be required when processing their application.

Question B1 – Are you married, in a civil partnership or living with someone as if you are married?

If the applicant answers 'Yes' to Question B1, **Question B2** will become a mandatory field.

Question B2 – The applicant should tell us the name of their spouse or partner (if they have one) and their relationship to them.

Income Details

Office use only
Ref. number:

Income Details (Part B)

About you

We need the income and personal details for you and your spouse or partner (if you have one) for the tax year **6 April 2009 to 5 April 2010** to assess your application. For the rest of this form, we will refer to you as the 'Applicant', and we may refer to your spouse or partner as 'Partner'.

B1 - Are you married, in a civil partnership or living with someone as if you are married?

Yes No

If you answered **YES**, we need to know about your spouse or partner's income as well as your own. Go to **B2**.

If you answered **NO**, go to **B3**.

B2 - Spouse or Partner's Details

Surname / Family Name:

First Name(s):

Relationship to Applicant: Spouse Partner

B3 - B11 are about Income Details - These **must** be for the **2009-10 tax year (6 April 2009 to 5 April 2010)**. You need to tell us about your income and that of your spouse or partner (if you have one). We do not need to know about your parents' income if you are still living with them.

If your current income or that of your spouse or partner (if you have one) is lower than in the 2009-10 tax year due to disability, as defined by the Disability Discrimination Act, see pages 15-16 of the Guidance Notes for further information.

Before you complete questions B3 to B11 of the application, see pages 16-24 of the Guidance Notes for help on what income you need to include in each box. State the amount you received and send us the evidence requested where we have asked for it (**round your answers down to the nearest pound and do not include pence**). You are encouraged to send us photocopies but they **must** be clear and complete. **Original documents** will be returned when we have processed the application.

B3 - Do you have a Tax Credit Award Notice (form TC602) that correctly states your income and that of your spouse or partner (if you have one) for the tax year 2009-10?

Before you answer this question read the information about Tax Credit Award Notices on pages 16-17 of the Guidance Notes.

No Yes

Write in your total income, as shown on the Tax Credit Award Notice. Round down to the nearest pound. Do **not** show pence.
For example: £

Go straight to B4.

Go straight to B12. Do not fill in any more questions in Income Details (Part B). Do not fill in Income Details, Benefits (Part C). You have completed your application. You must enclose your Tax Credit Award Notice with your application.

Questions B3 – B11 are all about income evidence

Advice on whose income needs to be considered can be obtained from the Learner Support helpline on **0800 121 8989**.

The applicant should be encouraged to send photocopies of their evidence, but these must be clear and complete. If they send **original** documents we will return them to the applicant when we have processed their application.

The Guidance Notes for each question contain additional information on the types of evidence that we are able to accept.

Question B3 – The easiest way for an applicant to supply the required income details is by using a Tax Credit Award Notice (TCAN). The TCAN must cover the entire tax year 2009-10 to be accepted as valid evidence. If the applicant has a TCAN that only covers part of the tax year, they should answer 'No' and complete Questions B4 – B11.

If the applicant answers 'Yes' to Question B3, the application must be accompanied by a valid **Tax Credit Award Notice (TCAN)** showing details of the applicant's and their partner's (if they have one) income for the previous **tax year; 6 April 2009 – 5 April 2010**. Please see Page 22 of this guide for further advice. Where the applicant has a valid TCAN, they will not be required to complete any more questions in Part B or Part C.

Some applicants are sending us the details about the amount of tax credit they receive, which is not the correct information that we require.

B4 to B6 - Income from Employment

Before you complete questions B4 to B6, see pages 18-20 of the Guidance Notes for help on what income you need to include in each box. If either you or your spouse or partner (if you have one) received no income during the tax year 2009-10 leave the boxes for 'Applicant' or 'Partner' blank. Where income has been received from employment, state the amount you received and send us the evidence requested where we have asked for it. If you were employed for only part of the tax year 2009-10 include this income in questions B4 to B6. **Round your answers down to the nearest pound and do not include pence.**

	Applicant	Partner	Evidence required
B4 Write in your total earnings as an employee from all jobs before taking off Tax and National Insurance contributions.	£ [][][][]	£ [][][][]	You need to send us any P60 or P60U forms you have for 2009-10.
B5 Write in the value of any benefits in kind from your employer, e.g. company car and fuel or taxable vouchers.	£ [][][][]	£ [][][][]	You need to send us any P9D or P11D forms you have from your employer for 2009-10.
B6 Write in your total income from self employment.	£ [][][][]	£ [][][][]	You need to send us your Self Assessment Tax Calculation form (SA302) for 2009-10, or call us on 0800 121 8989 if you do not have one.

Question B4 should be completed when the applicant or their spouse or partner (if they have one) was an employee during the last complete Tax Year. B4 requests a P60 or P60u, however, full guidance on the documentary evidence that can be accepted as evidence of income for this question can be obtained from the Learner Support helpline on **0800 121 8989**.

Question B5 should **only** be completed when the applicant or their spouse or partner (if they have one) was eligible for employee benefits that were not included in their salary e.g. rent paid directly to a landlord by their employer. Full details can be found on Pages 19 and 20 of the Application Form Guidance Notes.

Question B6 should be completed when the applicant or their spouse or partner (if they have one) was self employed. If they do not have a Self Assessment Tax Return form (SA302) for the last complete tax year, please contact the Learner Support helpline on **0800 121 8989** for further guidance.

B7 - Other Income

Work out the total for both adults of any **other income, including pensions**, using the table below.

Annual amount of:	Applicant	Partner	
Income from savings and investments	[][][][][]	[][][][][]	
Income from property	[][][][][]	[][][][][]	
Trusts, settlements and estates	[][][][][]	[][][][][]	
Foreign income	[][][][][]	[][][][][]	
Pensions (state, occupational or personal)	[][][][][]	[][][][][]	
Notional income	[][][][][]	[][][][][]	
Now add together the totals	[][][][][]	+	[][][][][] = [][][][][]
		Now deduct £300	- 3 0 0
Total (if this makes a minus figure, just enter £0)			[][][][][]
Adult Dependant's Grant or miscellaneous taxable income (include the full amount)			[][][][][]
Total other income (round down to the nearest pound)			£ [][][][]

Question B7 should be completed when the applicant or their spouse or partner (if they have one) were receiving any other income listed during the last complete tax year. Pages 21 and 22 of the Guidance Notes provide an explanation for each income indicated and the applicant and their spouse or partner (if they have one) must provide a breakdown of any 'Total other income' over £300 using the boxes provided.

Although most income entered here will not require evidence, there are special considerations for 'Foreign income' – please see page 22 of the Application Form Guidance Notes for further details.

If your current income is significantly lower than your 2009-10 declared income above, call us on **0800 121 8989** for help, see page 6 of the Guidance Notes.

B8 to B9 - Allowable Deductions

	Applicant	Partner	
B8 Write in any personal pension contributions you paid into a registered scheme. Enter the gross amount.	£ [][][][]	£ [][][][]	If you paid your pension contributions through your employer, you do not have to fill in this box. Your employer will already have deducted your pension contributions from the pay figure entered on your P60 or P45.
B9 Statutory Maternity, Paternity or Adoption Pay. Before you answer this question, see page 23 of the Guidance Notes.	£ [][][]	£ [][][]	

Questions B8 & B9 should only be completed for the allowable deductions shown – we will not require any evidence of the figures quoted in these questions when processing the application. Page 23 of the Guidance Notes provides additional advice for Question B9.

Question B10 should be completed when either the applicant or their spouse or partner (if they have one) was in receipt of any of the benefits listed at this question.

The applicant will need to ask the DWP Jobcentre Plus office that paid these benefits to complete the Income Details, Benefits section (Part C) of the form. Further information on which sections of Part C should be completed can be found on pages 16 and 17 of this guide.

B10 - Did you or your spouse or partner (if you have one) receive any of the following benefits for part of, or the whole of, the tax year 2009-10?

Income Support, Pension Credit, Carer's Allowance, Contributions-based Jobseeker's Allowance, Income-based Jobseeker's Allowance, Incapacity Benefit, Employment and Support Allowance (ESA) or Bereavement Allowance.

Applicant	Yes	No	Partner	Yes	No
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

If either you or your spouse or partner answered **YES** to this question, Income Details, Benefits (Part C) must be completed by you and the office dealing with your benefits. When this has been completed and returned to you, send it to us with the rest of your application. See page 26 of the Guidance Notes. You cannot receive ALG and claim out of work benefits at the same time.

Question B11 – it is advisable that the applicant and their spouse or partner (if they have one) read Page 24 of the Application Form Guidance Notes before answering this question as it details how to complete this question and shows the kinds of income that we do not take into account for assessment purposes.

We do not require any supporting documentation for this question so the applicant must be as specific as possible and include a clear indication of the dates this income was received e.g. *'I only received EMA and was supported by my parents during the whole of the tax year 2009-10'*.

B11 - During the tax year 2009-10, did you or your spouse or partner (if you have one) receive any of the 'other' kinds of income listed on page 24 of the Guidance Notes? If you did, tell us where this income came from in the boxes below. If either of you were supported financially, for example, by parents or maintenance from an ex-partner, you must include this in the boxes below as well. Check the Guidance Notes for what 'other' income means before you answer this question.

Applicant	Partner
[]	[]

Now go to B12 on the next page

B12 - Privacy Notice and Applicant and Spouse or Partner Declaration

Privacy Notice

The information you provide on this form will be passed to the Young People's Learning Agency for England ("the YPLA"). The YPLA is responsible for funding, planning and encouraging education and training for over 16-year-olds in England, and is registered under the Data Protection Act 1998. The information you provide will be shared with other organisations for administration and statistical purposes. Other organisations with which we will share information include the Department for Children, Schools and Families, Department for Business Innovation and Skills, Connexions, Local Authorities, Higher Education Statistics Agency, Higher Education Funding Council for England, UCAS, Student Loans Company, educational institutions and organisations performing research and statistical work on behalf of the YPLA or its partners.

Further information about partner organisations, and what they do, may be found at www.ypla.gov.uk

At no time will your personal information be passed to organisations for marketing or sales purposes.

Applicant Only

From time to time learners are approached to take part in surveys by mail and phone, which are aimed at enabling the YPLA and its partners to monitor performance, improve quality and plan future provision.

Mark box A if you **DO NOT** wish us to tell the person named as your spouse or partner in B2 of Income Details (Part B) of this form about your completed application and payments. **A**

Mark box B if you **DO NOT** wish to be contacted by the YPLA or its partners in respect of surveys and research. The YPLA values your views on the education or training which you receive, and will use these to help bring about improvements for learners aged over 16 in England. **B**

The YPLA or its partners may wish to contact you from time to time about courses, or learning opportunities relevant to you. Mark box C if you **DO NOT** wish to be contacted about courses or learning opportunities by post. **C**

Applicant and Spouse or Partner Declaration

If you give false or incomplete information, or if you and your spouse or partner do not tell us about any part of your income that is relevant, you may be prosecuted. As part of our assessment process we will sample application forms and may ask for further evidence. If that evidence is not provided, or results in a lower award being due, we may stop any future payments and seek repayment of anything paid.

I / We have read and understood the Guidance Notes supplied with this form including the Privacy Notice above.

I / We declare that all information given in support of this application is correct and complete to the best of my / our knowledge and belief.

I / We understand that:

- we share responsibility for the information given with any spouse or partner named on this form
- if the person applying for ALG with this form does not keep to their ALG Agreement, or if they leave their learning programme, they will not be eligible to receive further payments and any ALG overpaid may need to be repaid
- the information I / we have given may be shared with other agencies or organisations, as allowed by law, for the purposes of checking this application and / or the prevention of fraud
- the learner is eligible for support on residency grounds as explained in the Guidance Notes and can provide **suitable evidence as proof if required**.

Important – You are not required to sign and date this application, however by submitting this form and applying for support you and your spouse or partner are agreeing to all the statements and conditions above.

The check boxes in **Question B12** are not mandatory.

These will determine the amount of contact the applicant receives from the YPLA with regard to surveys and research and / or courses and learning opportunities.

The question also contains an option allowing the applicant to determine who the LSS can or cannot speak with regarding their application.

Applicant and Spouse or Partner Declaration

Although the Application Form does not need to be signed by the applicant and their partner (if they have one), they should read the declaration carefully as by completing and sending the Application Form, the applicant and their spouse or partner (if they have one) is agreeing to the terms set out in the declaration.

Part B Mandatory Fields:

B1; where the applicant has a spouse or partner; B2 to capture spouse or partner details; and **either** Question B3, **or** where the applicant does not have a valid TCAN, they must complete all of the relevant questions shown at B4 - B11.

Part C: Income Details, Benefits

Introduction

Part C should only be completed if the applicant or their spouse or partner (if they have one) were in receipt of Social Security Benefits during the relevant Tax Year and where a Tax Credit Award Notice is not being used as Income Evidence.

If **Question B10** has been answered as 'Yes' by either the applicant or their spouse or partner (if they have one); then the completion of Part C is **mandatory**.

Part C **must** be completed by a local or regional DWP office. Please note that this may not be the local DWP office as some benefits are issued from centralised locations and these offices will need to complete the relevant details. It is recommended that this further evidence version of Part C be posted to the DWP office that issues the benefits for completion.

Where either the applicant or their spouse or partner (if they have one) was in receipt of Income Support, Income-based Jobseeker's Allowance, Income-related Employment and Support Allowance or Pension Credit during the tax year 2009-10, only the person who received these benefits will need to complete Part C. For further advice, please contact the Learner Support helpline on **0800 121 8989**.

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Fill in your details on this page if you received social security benefits between 6 April 2009 and 5 April 2010 (Tax year 2009-10).

Spouse or partner of the ALG Applicant

Surname / Family Name

First Name(s)

National Insurance number

Address

I authorise the Department for Work and Pensions to disclose information regarding my benefits and allowances for the purposes of assessing an application for ALG. **Sign here**

For DWP office use only – The applicant must not write below this line

C3 - The person named above was in receipt of Income Support, Income-based Jobseeker's Allowance, Income-related Employment and Support Allowance or Pension Credit during the tax year 2009-10.

Yes, for the whole year **You do not need to complete any further questions. Sign and date the declaration below.**

Yes, for part of the year – fill in the start and end dates in the boxes provided

Now complete question C4 if applicable and sign and date the declaration below.

C4 - The person above was in receipt of other benefits during the tax year 2009-10 as follows:

	From (date)	To (date)	Weekly rate
Carer's Allowance (incl. any CDI elements)			£
Contribution-based Employment and Support Allowance			£
Contribution-based Jobseeker's Allowance (excluding any amounts of JSA(IB))			£
Incapacity Benefit – short term higher rate – gross amounts including any CDI elements. Exclude Incapacity Benefit claimed before 1995.			£
Incapacity Benefit – long term higher rate – gross amounts including any CDI elements. Exclude Incapacity Benefit claimed before 1995.			£
Bereavement Allowance			£

If the person claimed any of the above benefits for more than one period write in the type of benefit, the period(s) of the claim and the weekly rate in the boxes below.

Now sign and stamp the form and return to the the applicant named overleaf

I confirm the benefit details entered on the previous page and, if applicable, above.

DWP officer initial and surname

DWP officer sign here

Date

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ALG 10

Where the learner's spouse or partner (if they have one) was in receipt of benefits during the 2009-10 tax year, they should complete page ALG 10 of the form.

The applicant's spouse or partner (if they have one) should complete the 'Spouse or Partner of the ALG Applicant' section before sending this part of the form to the DWP office that issued their benefits. The DWP will complete the information relating to any benefits that the partner received during the 2009-10 tax year.

Applicants must not write below this line

Questions C3 and C4 must be completed by the DWP Jobcentre Plus office that issues their benefits.

Part C Mandatory Fields:

Information in C1, C2, C3 and / or (where appropriate) C4, DWP stamp and signature.

For Part C to be accepted as valid evidence, it must be signed and stamped by an officer of the DWP. Please see page 20.

What to look for on Income Details, Benefits (Part C) – after completion by DWP Jobcentre Plus

- Check that Part C has been stamped and signed by the DWP at the bottom of page ALG 10

Now sign and stamp the form and return to the the applicant named overleaf

I confirm the benefit details entered on the previous page and, if applicable, above.

DWP officer initial and surname

DWP officer sign here

Date

JOBCENTRE PLUS
5A WEDOMSLEY ROAD
COSSETT
COUNTY DURHAM
DH8 5HE

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■ ALG 10 ALG 10 ■

- If either the applicant or their spouse or partner (if they have one) has answered 'Yes' to Question B10, check that the DWP Jobcentre Plus have also completed the relevant questions at Questions C1 to C4. An example is shown below.

For DWP office use only – the applicant must not write below this line ←

C1 - The person named above was in receipt of Income Support, Income-based Jobseeker's Allowance, Income-related Employment and Support Allowance or Pension Credit during the tax year 2009-10.

Yes, for the whole year

Yes, for part of the year – fill in the start and end dates in the boxes provided

You do not need to complete any further questions. Sign and date the declaration overleaf.

From (date)	To (date)
<input type="text" value="DDMMYY"/>	<input type="text" value="DDMMYY"/>
<input type="text" value="DDMMYY"/>	<input type="text" value="DDMMYY"/>

Complete question C2 if applicable and sign and date the declaration overleaf.

Applicants should not write below the 'For DWP office use only' line

Section 2: The main four types of income evidence

Introduction

This section will provide advice on the four main types of income evidence that are required to support an application for ALG. It includes an image of what to look for on each piece of evidence, with practical advice.

- The applicant should be encouraged to send photocopies of their evidence, but these must be clear and complete. If they send original documents we will return them to the applicant or their spouse or partner (if they have one) when we have processed the application.
- The relevant tax year for the **2010/11 (Purple) Application Form** is the period **06 April 2009 to 05 April 2010**.
- Any queries regarding other income evidence should be referred to the Learner Support helpline on **0800 121 8989**.

The main four types of income evidence are:

- Tax Credit Award Notice (TCAN) – document received from the Inland Revenue detailing entitlement to Working Tax Credits or Child Tax Credits.
- Part C – benefits statement issued as part of the application pack (please see page 20).
- P60 – Statement of earnings from an employer.
- Self assessment tax calculation form (SA302).

What to look for on a Tax Credit Award Notice (TCAN)

- Locate the section that shows the heading “Your income for the year...” on the current version of the TCAN this is usually found on Page 2 or 3 as seen in the enlargement below.
- Income should be for the complete 2009-10 Tax Year (circled on both images).

MR KURT STONE
You work 16 hours a week.

MRS GRACE STONE
You claimed tax credits jointly with the person named above.
You work 16 hours a week

Qualifying children and young people
1 aged one or less.
3 aged between one and sixteen.
3 aged between sixteen and twenty.

Childcare costs
You have no qualifying childcare costs. If you start to pay for childcare and you qualify for Working Tax Credit you may be able to claim the childcare element of Working Tax Credit. Contact us for details.

Income
This is the information we have about your income. Please check that it is correct.
Your income for the year 6 April 2008 to 5 April 2009

MR KURT STONE		
Earnings as an employee	<u>£10000.00</u>	
Your total income		£10000.00
MRS GRACE STONE		
Earnings as an employee	<u>£5000.00</u>	
Your total income		<u>£5000.00</u>
Total income for the year from 6 April 2008 to 5 April 2009		<u>£15000.00</u>

Income
This is the information we have about your income. Please check that it is correct.
Your income for the year 6 April 2009 to 5 April 2010

MR KURT STONE		
Earnings as an employee	<u>£10000.00</u>	
Your total income		£10000.00
MRS GRACE STONE		
Earnings as an employee	<u>£5000.00</u>	
Your total income		<u>£5000.00</u>
Total income for the year from 6 April 2009 to 5 April 2010		<u>£15000.00</u>

Further Information: Tax Credit Award Notice (TCAN) – wrong tax year

Many applications are returned as the Tax Credit Award Notice shows the wrong tax year. The Tax Credit Award Notice (TCAN) must show income for the last complete tax year (on the current version of the TCAN this information will be usually situated on Page 2 or 3).

Look for the heading “Your Income for...” (on Page 2 or 3 of the current version of the TCAN), the dates shown should be the last complete tax year. For the purple application form all of the income evidence indicated must be for the complete tax year 6 April 2009 – 5 April 2010.

When a TCAN is not available, the applicant or their spouse or partner (if they have one) can use alternative evidence e.g. P60. Contact the Learner Support helpline on **0800 121 8989** if further advice is required.

What to look for on a P60

- Check that the P60 is for the last complete Tax Year (usually shown at the top of the document).
- Verify that the P60 is for the correct adult.
- Locate the section that shows the income received – this will be shown on the P60 but there are many different formats of P60 and this information can appear in different places, but will usually be shown as 'Total pay for year', 'Total Income received' or 'Gross Income'.
- Check that the income matches that shown in Question B4.

Please note that there are many different versions of P60s and the information may appear in different places on the document.

P60 End of Year Certificate

Tax year to 5 April **2010**

To the employee:
Please keep this certificate in a safe place as you will need it to fill in a Tax Return for Tax Credits.

It also helps you check that your employer is using the correct rates for deducting the contributions.

By law you are required to tell HM Revenue & Customs about any income that is not fully taxed, even if you are not sent a Tax Return.

HM REVENUE & CUSTOMS

The figures marked ★ should be used for your Tax Return, if you get one

Employee's details

Surname: Kemp
Forenames or initials: Christopher
National Insurance number: HM 12 34 56 A
Works/payroll number: 011 222 3454

Individual's details

Pay and Income Tax details

	Pay		Tax deducted	
	£	p	£	p
In this employment ★	10000	00	2500	00
Total for year	10000	00	2500	00

if refund mark 'R'

Employee's Widows & Orphans/Life Assurance contributions in this employment ★

6471 Final tax code 522L

Taxable Income

National Insurance contributions in this employment

NIC table letter	Earnings up to and including the Earnings Threshold (where earnings are equal to or exceed the Lower Earnings Limit)	Earnings above the Earnings Threshold, up to and including the Upper Earnings Limit	Employee's contributions
	£	£	£ p

INFORMATION ONLY

What to look for on an Self Assessment Tax Calculation (SA302)

- Check that the SA302 is for the last complete Tax Year* (this will be indicated within the document).
- Verify that the SA302 is for the correct person.
- Locate the section that shows 'Total income received'.
- Check that the income matches that shown in Question B6.

*If the date shown is not for the last tax year, advise the applicant to contact the Learner Support helpline on **0800 121 8989** for further advice.

The image shows a screenshot of a Self Assessment Tax Calculation (SA302) form. The form is titled 'Self Assessment - Tax Calculation' and is issued by HM Revenue. The taxpayer's name is 'Mr Frank Peach' and the tax year is '2009-10'. The form lists various income sources and their amounts, with a total income of 18,500. Callouts point to 'Mr Frank Peach' (Adult details), 'Tax Calculation for 2009-10' (Tax Year), and '18,500' (Individual's details).

Income	
Employments and Directorships (PAYE) minus expenses	5,000
Self-Employment (as a sole trader)	5,000
Partnerships	1,000
UK Land and Property	5,000
UK Interest (before tax)	1,000
UK Dividends and tax credits	500
UK Pensions and benefits	1,000
Total Income	18,500

Section 3: Other Resources that you may find helpful

The marketing and support materials for ALG change each year and we ask Providers to remove old stock and replace with new stock as soon as possible. In order to ensure you have the most recent materials, please check the website: alg.ypla.gov.uk. This is particularly important in the case of the application form as applications submitted to the LSS on the wrong year's form will be rejected, slowing down the application and assessment process for the learner.

The following marketing and support materials are available for ALG in 2010/11.

- **Leaflet** aimed at the learner to give clear and simple messages about ALG (ref. YPLA-P-100019).
- **General poster** to raise awareness of ALG in places outside Learning Providers where there may be queues, for example, the Post Office. Poster size is A3 (ref. YPLA-P-100020).
- **Birthday card** to be used by Learning Providers to send out to individuals on their 19th birthday to promote ALG. Includes envelope (ref. YPLA-P-100021).
- **ALG business card**, which is the size of a credit card and carries useful information to assist the learner in applying for ALG. This card also includes the website address and helpline number (ref. YPLA-P-100022).
- **ALG business card holder** – a counter display card carrying up to 50 business cards (ref. YPLA-P-100023).
- **ALG Big Picture** to be used as a desk aid, providing a high-level overview of scheme eligibility (ref. YPLA-P-100048).
- **Application form** for learners to complete to apply for ALG (ref. YPLA-P-100002).



The leaflets and posters can be viewed and downloaded from the YPLA Campaign Resources website at ypla.gov.uk/campaignresources and from the YPLA ALG website at <http://alg.ypla.gov.uk/>

Printed copies of materials can be ordered by contacting YPLA Publications as follows. Please quote the relevant publication reference number when ordering.

YPLA Publications
PO Box 5050
Sherwood Park
Annesley
Nottingham NG15 0DJ

Phone: 0845 602 2260

Fax: 0845 603 3360

Minicom: 0845 605 5560

Email: ypla@prolog.co.uk

ALG Application Resource Pack 10/11

YPLA-P-100052

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Published by the Young People's Learning Agency

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