

# Guidance Notes for ALG Year 2010/11

Helping you fill in the ALG Application Form

**These notes will help you fill in the form to apply for an Adult Learning Grant (ALG).  
You should read them before you start filling in the form.**

## Which part of the form should you fill in?

### If you are the Applicant

- Fill in Learner Details (Part A)
- Fill in Income Details (Part B)
- Fill in Income Details, Benefits (Part C) if you received social security benefits in the tax year 2009-10.

### If you are the Spouse or Partner (if applicable)

- Fill in Income Details (Part B)
- Fill in Income Details, Benefits (Part C) if you received social security benefits in the tax year 2009-10.

## Here are some general tips

- Use **BLACK INK** and write in **BLOCK CAPITALS**
- Write as clearly as you can. If we cannot read the form, we will send it back to you
- Mark boxes clearly, like this: **X**
- When you have filled in all the parts of the form that apply to you, check that you have enclosed all the evidence we have asked for.

## If you read these notes and still have questions, or need more help:

- Visit [www.direct.gov.uk/alg](http://www.direct.gov.uk/alg) at any time.
- Call us on **0800 121 8989** between 07:00 and 20:00 Monday to Friday

SAMPLE

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## Who can claim Adult Learning Grant (ALG)?

### Your income

You can apply for ALG if:

- you are single and between 6 April 2009 and 5 April 2010 your income was **£19,513 or less** or
- you are married or live with someone as if you are married to them and between 6 April 2009 and 5 April 2010 you had a joint income of **£30,810 or less**

If you are married or live with someone as if you are married, and you are both students who apply for ALG we will discount the spouse or partner's income from the financial assessment and you will be assessed as a single learner.

You cannot claim ALG if you are in receipt of Income Support, Jobseeker's Allowance, Employment and Support Allowance (ESA) or Incapacity Benefit.

### Your age

To be eligible for ALG, you must be aged 19 or over.

You must be of 'working age' in order to be eligible for ALG. The Department for Work and Pensions (DWP) defines this as up to 65 for men and women. If you are over 65 contact us for further information on **0800 121 8989**.

### Your learning programme

In order to receive ALG you must be learning full time, this means a course that requires the learner to complete an average of 12 hours 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 (see pages 12-13 for further details).

We will establish what your highest previous qualification level is in question A10. If you are eligible for support, we will send you a Notice of Entitlement (NoE) that you need to take to your Learning Provider in order to receive ALG. When you apply **we will not** check the eligibility of the course you intend to study, this is the responsibility of your Learning Provider. When enrolling you on ALG your Learning Provider will undertake a final check to ensure that you and your course meet the criteria. A guide to how your qualifications fall into the qualification levels is available on page 13 of these Guidance Notes.

If you are following an Apprenticeship or Programme Led Apprenticeship (PLA) programme you are **not** eligible for ALG support.

### Other important information

- If you are in prison or a Young Offenders Institution or have been Released on Temporary Licence (ROTL) you are not eligible to claim ALG. However, you may apply for the scheme while serving your sentence once your expected release date is known. No ALG payments will be made until after release, and then only if the eligibility conditions are met
- If you have been released from prison or a Young Offenders Institution or you remain under supervision (even if you are electronically tagged) in the community, you can apply for ALG
- You will need to supply discharge papers as evidence that you are no longer serving a custodial sentence. If you have lost your evidence you will need to speak to your probation officer and obtain replacement documentation, before your eligibility can be assessed.

## How to contact us

**Our address:** FREEPOST RRUB-BEXE-TJLK, Learner Support Service, Darlington DL1 4WD

**Our phone number:** 0800 121 8989

**Our website:** [www.direct.gov.uk/alg](http://www.direct.gov.uk/alg)

## How to claim ALG

You must fill in Learner Details (Part A) of the form that came with these notes. Fill in the form as honestly and completely as you can.

If you make a mistake, make sure your changes are clear. **Do not use correcting fluid as this will result in your application being returned.**

You must also fill in Income Details (Part B) and Income Details, Benefits (Part C) where these apply to you.

If you have a spouse or partner they must fill in Parts B and C (where applicable).

Once you have filled in the form, make sure you have the evidence you need to complete your application and send it all to us, using the pre-paid envelope included in the ALG application pack.

If your application is accepted we will send you an ALG Notice of Entitlement (NoE) to tell you how much your payments could be. You will only be eligible for ALG and start to receive the money if your college or Learning Provider tell us that you have enrolled on a **valid learning programme** and that you are attending as agreed – when you go to enrol, remember to take your NoE with you. **You must take your NoE to your Learning Provider as soon as you receive it. Your NoE is only valid for the academic year 2010/11.**

If we receive your application **within 28 days** of you starting your learning programme, you may be entitled to receive payments from the start date of your learning programme. ALG payments cannot be made until you give your ALG NoE to your Learning Provider. If we do not receive your application within 28 days then payments will start from the Monday of the week in which we received your application.

If your application is rejected we will write and tell you why.

## How much ALG could you get?

For ALG you are assessed on income from the previous tax year (2009-10).

If you are single we will assess you on your personal income. This must be **£19,513 or less** for you to be eligible for support.

If you are married or live with someone, as if you are married, we will assess your joint income which must be **£30,810 or less** for you to be eligible for support.

We will not assess your parents' income for ALG even if you live with them.

The following tables indicate how much ALG you could receive based on your income or your joint income if applicable.

Table 1 – Single Applicants

Income for the 2009-10 tax year	Weekly ALG payment
Up to £11,810	£30
£11,811 - £15,405	£20
£15,406 - £19,513	£10
Over £19,513	Nil

Table 2 – Learners who are married or living with a partner as if they are married

Income for the 2009-10 tax year	Weekly ALG payment
Up to £20,817	£30
£20,818 - £25,521	£20
£25,522 - £30,810	£10
Over £30,810	Nil

If your income has fallen by 15% or more (against your 2009-2010 income) we may be able to take your current income into account. Call us on **0800 121 8989**.

### **Important information about the Disability Discrimination Act 1995 (DDA)**

If at the time of applying you and your partner's income (if you have one) is lower than it was in the 2009-10 tax year, and this is due to a disability as stated by the DDA, we may be able to take your current income into account for ALG assessment purposes.

If you think this applies to you read pages 15-16 of these Guidance Notes or call us on **0800 121 8989**.

## **Information for offenders / ex-offenders**

If you are in prison or a Young Offenders Institution (YOI) or have been Released On Temporary Licence (ROTL) you are not eligible to claim ALG. However, you may apply for the scheme while serving your sentence once your expected release date is known. No ALG payments will be made until after release, and then only if eligibility conditions are met. In this circumstance, you will still need to supply your income evidence for 2009-10. You also need to supply evidence of your proposed release date – this will ordinarily be a discharge licence paper.

If you have been released from prison or a Young Offenders Institution or you remain under supervision (even if you are electronically tagged) in the community, you can apply for ALG. In this circumstance, you will need to supply your income evidence for 2009-10. You will also need to supply evidence of your time in the institution as part of the ALG income assessment of the 2009-10 tax year.

## Question A2

Date of birth

Fill in your date of birth in numbers, like this example:

2 5    0 9    1 9 6 9

## Question A5

Equal  
Opportunities  
Monitoring

We have asked some questions so that we can be sure we are reaching all parts of our community. Any information you give us will be completely confidential. You do not have to answer the questions - it will not make any difference to your application.

**Do you consider yourself to have a disability?**

The Disability Discrimination Act 1995 states that a disability is a physical or mental impairment which has a substantial and long-term (that is more than 12 months) adverse effect on a person's ability to do normal daily activities. You may still be considered to have a disability if you are not adversely affected at the moment but the impairment is likely to recur.

## Question A7

Your Bank or  
Building Society  
account details

To receive ALG, you must have a UK bank or building society account in your own name that we can make BACS payments into. We cannot make payments to you by cheque, or into someone else's account.

If you already have a UK bank or building society account and it is an account that can accept payments directly, you do not need to open a new one for your ALG payments. Just give us details about the account that you want us to use.

We can make payments into a joint account, as long as you are one of the account holders.

Only in exceptional circumstances, specifically if a learner has a disability that may cause them difficulty in administering a bank account, the Young People's Learning Agency for England (YPLA) will consider whether a proxy bank account can be used. Please call us on **0800 121 8989** for help if this applies to you.

If you have a Credit Union account you may be able to use it – check with your Credit Union to make sure that your account will accept ALG payments.

If you have a Post Office® card account you will **not** be able to use it – these accounts do not accept ALG payments.

**Opening an account**

If you do not have a UK bank account, you **must** open one before you apply for ALG. The account must accept direct payments.

Along with your filled-in form, you must send us evidence from your bank or building society, showing your name, home address and account details (account number, sort code and roll number if applicable). Some banks may send you a letter when you open an account, but you can normally find this information on an account statement. If you have an internet bank account, we will accept a print out of your internet bank statement or your bank should be able to send you a statement in the post. You are encouraged to send us photocopies but these **must** be clear and complete. However, if you decide to send us **original evidence**, this will be returned when we have processed the application.

**We will not accept as evidence:**

- a mini statement from a cashpoint or
- a print-out of an internet bank statement that does not include your name or home address.

If you do not have a statement yet, tear off the Confirmation of Bank/Building Society Account form at the back of these guidance notes and ask your Bank or Building Society to fill it in and stamp it. You can then send it to us with your application, instead of a statement or a letter showing your full account details. If you have any problems or concerns about using or opening a bank account, please call us on **0800 121 8989**.

## Question A8

## Residency

**Important:** You must study at a Learning Provider in England funded by the Chief Executive of Skills Funding and must have been living in England for at least three years prior to the start of your learning programme to be eligible for ALG support.

If your application for ALG is successful you will be sent a Notice of Entitlement (NoE) which you must take to your Learning Provider in order to be enrolled for ALG payments. Learning providers are encouraged to confirm that you meet the residency criteria, along with other criteria for the scheme, before enrolling you. If the Learning Provider does not consider that you meet the eligibility criteria, they will explain this to you.

If you are resident in Scotland or Wales and received ALG in 2009/10 you should call us on **0800 121 8989**.

You must read the guidance below to find out if you meet the residency conditions of ALG. You will need to confirm your eligibility by marking the box that applies to you on the application form. You should be aware that at any point we may contact you to prove that you meet the residency criteria for the scheme.

**Mark Box A**

- if you are a British Citizen and have lived in England for at least three years prior to the start of your learning programme. If you hold a United Kingdom of Great Britain or Northern Ireland passport this option applies to you.

**Mark Box B**

- if you have 'settled status' in the UK and have been ordinarily resident in England for at least three years prior to the start of your learning programme. 'Settled status' means having either indefinite leave to enter or remain (ILE/R) or having the right of abode in the UK.

British citizens and certain other people have the right of abode in the UK:

- British Overseas Territory Citizen
- those whose passports have been endorsed to show they have a Right of Abode in the UK
- those who have a certificate of naturalisation or registration as a British Citizen.

**Mark Box C**

- if you are an EU national (including Gibraltar) or the spouse, 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 your learning programme.

**Mark Box D if you are either:**

- a European Economic Area (EEA) national who is a worker, has worked or is looking for work in England and have been ordinarily resident in England for three years prior to the start of your learning programme. If you are a spouse, civil partner or child of an EEA national who is a worker, has worked or is looking for work in England, and have been ordinarily resident in England for three years prior to your learning programme you are also eligible to apply for ALG
- a Swiss national or the spouse, civil partner or child of a Swiss national who is a worker, has worked or is looking for work in England and have been living in England for three years prior to the start of your learning programme
- a Turkish worker or the spouse, civil partner or child of a Turkish who has the right to work in the UK and is a worker, has worked or is looking for work in England and have been living in England for three years prior to the start of your learning programme.

**Mark Box E**

- if you have been granted 'refugee status' by the UK Government, or you are 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.

**Mark Box F**

- if you do not meet any of the other descriptions listed in boxes A-E.

**Temporary Absences**

Absences totalling six months in three years are counted as temporary and disregarded for residency eligibility when determining if a learner has been ordinarily resident in England for three years prior to the beginning of their learning programme.

Absences between six months and three years can be counted as temporary, provided the absence was always intended to be temporary and evidence is available to support this.

**Military Personnel**

If you have been on an official overseas posting or are the spouse, civil partner or child of a person who has been on an official overseas posting then you will be exempt from the criteria to be ordinarily resident in England for three years prior to the start of your learning programme. Please contact us on **0800 121 8989** if you need further advice around temporary absences.

**You will not be eligible for ALG if either of the following applies to you:**

- You are an Asylum seeker or have been granted Asylum
- You have discretionary leave or exceptional leave to enter or remain.

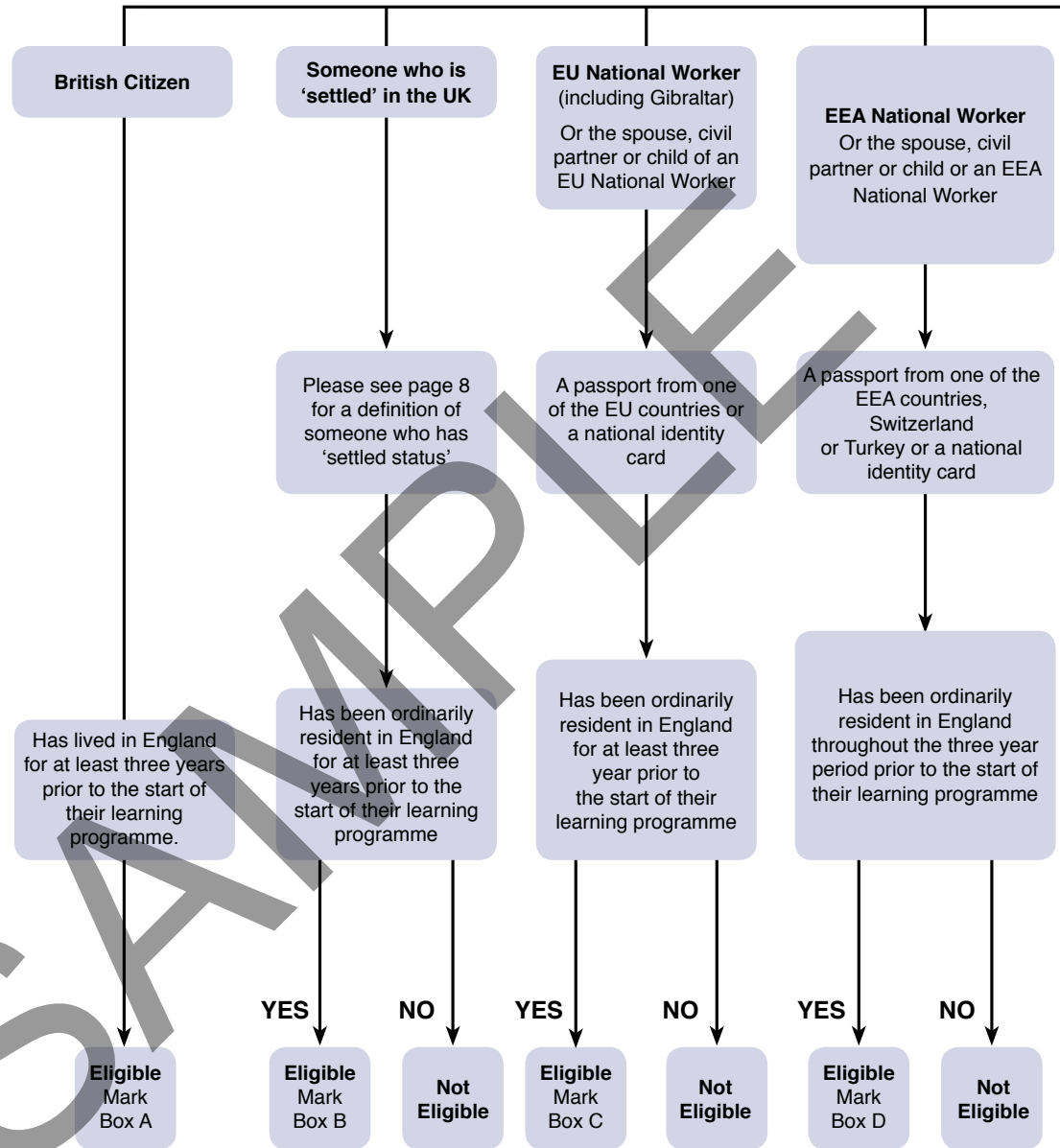
If you will meet the eligible residency conditions at a point in the future please call us on **0800 121 8989** for further advice.

**Please see the diagram of residency conditions overleaf** 

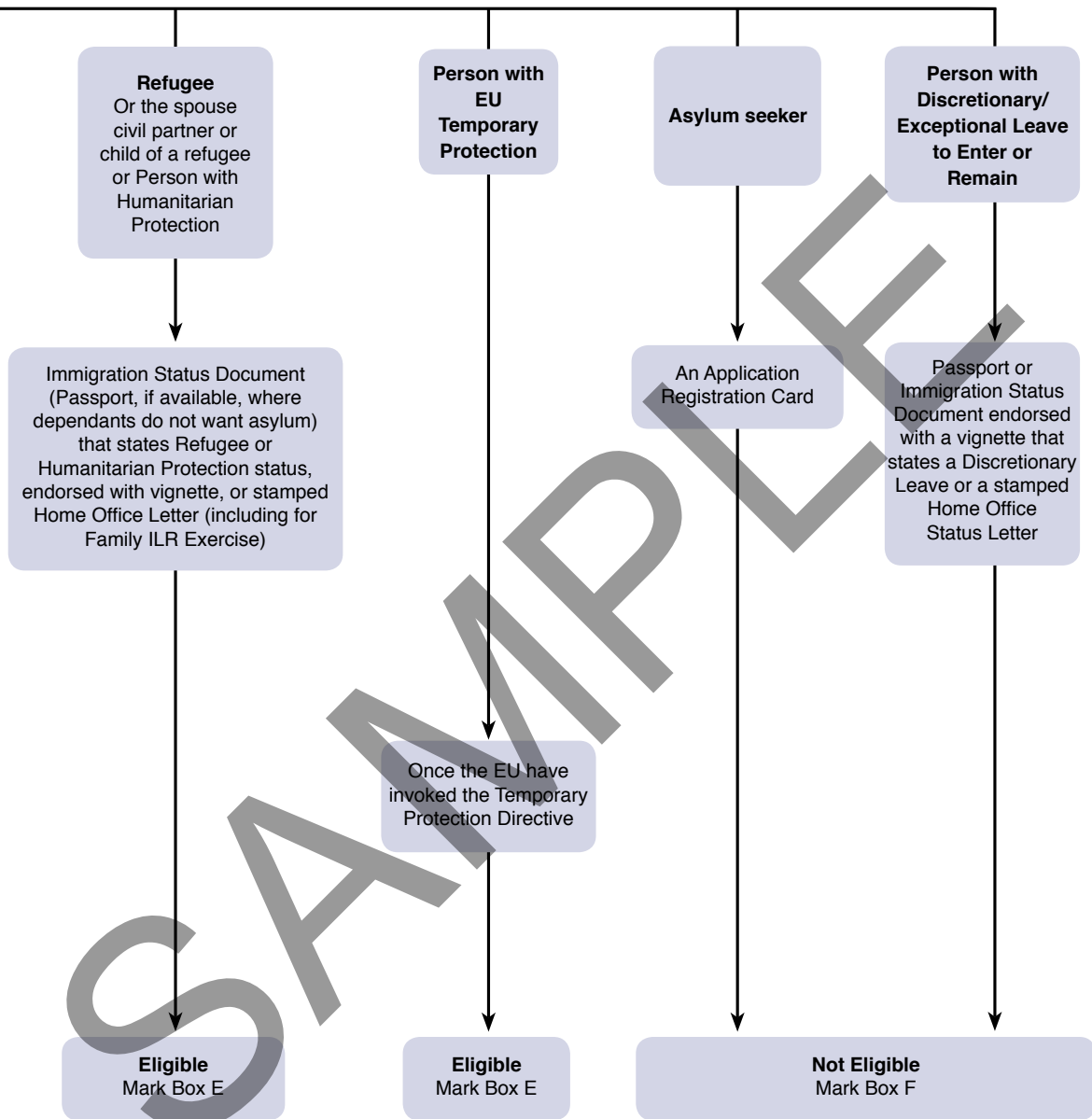
# Do I meet the residency conditions for ALG?

For general enquiries regarding relevant documentation call the Immigration and Nationality Enquiry Bureau on 0870 606 7766.

Please note that they will not be able to assess eligibility for ALG.



NOTE: If you have been temporarily absent from England during the three years residency qualifying period, please see page 9 for more information about eligibility.



## Question A9

Do you have any qualifications?

We need to know the qualifications that you already have. Mark the **'Yes'** box if you have **already gained** a qualification (do not include the qualification that you intend to study).

If you have not gained any qualifications mark the **'No'** box and go to question A11.

## Question A10

Your previous qualifications

Mark the qualifications that you have already fully completed.

The table on page 13 is a guide to show how different qualifications fall into the various qualification levels. This is only a guide and will be correct for most qualifications although some exceptions apply. The table is not a full listing due to the wide range of qualifications currently available. If you are unsure or your qualification is not listed in the table call us on **0800 121 8989** for advice or speak to Student Services at your Learning Provider.

If City and Guilds, OCR or RSA is your highest qualification level please mark the box 'Other' and write the full name of the qualification in the box provided **and send us a copy of your certificate with your application.**

You must be studying for your **first full Level 2** or **first full Level 3** qualification.

ALG is **not** payable to learners studying for Level 1, 4 or 5 qualifications.

If you have overseas qualifications mark the 'overseas qualifications' box and read the guidance on NARIC below.

**NARIC\***

If any of the qualifications you stated in A10 were obtained outside the UK then you should enclose a NARIC Certificate with your application. You can get a NARIC certificate from your Learning Provider.

If you do not supply a NARIC certificate we will be unable to process your application.

\*National Recognition Information Centre for the United Kingdom. NARIC is the first step for anyone planning to work or study in the UK. NARIC is an organisation that allows workers and learners from overseas to understand how their qualifications relate to those in the UK.

## Question A11

Your Learning Provider

**Name of Learning Provider**

Fill in the name of the Learning Provider where you intend to study if you know it. If you do not know it leave this box blank.

Qualification Level	Academic qualification equivalent	Vocational qualification equivalent
Level 1	GCSE/O-level grades D-G (or fewer than 5 at grades A-C) CSE below grade 1 One AS level	BTEC First Certificate BTEC Certificate/Diploma BTEC Introductory Diploma City and Guilds Operative Awards CPVE Year 1 (Technician) GNVQ Foundation LCCI Elementary/First Level NVQ Level 1 PEI Elementary/First Level RSA RSA Elementary/First Level RSA Vocational Certificate
Level 2	GCSE/O-level (five or more at A-C) CSE grade 1 (five or more) One A Level Two/three AS levels	General Certificate with credit BTEC First Diploma City and Guilds Higher Operative/ Craft GNVQ Intermediate LCCI Certificate (Second Level) NVQ Level 2 PEI Stage 2 Pitmans Intermediate Level 2 Diploma Certificate RSA Diploma
Level 3	Two or more A-level passes (at grades A-E) International Baccalaureate	City and Guilds Advanced Craft BTEC National Award* AVCE, VCE or Vocational A-level Double/Single Awards BTEC National Certificate/National Diploma Access to Higher Education Courses GNVQ Advanced LCCI Diploma (Third Level) NVQ Level 3 Pitmans Level 3 Advanced Higher Certificate RSA Stage 3 Advanced Diploma TEC Certificate/Diploma ESOL and foreign languages advanced awards
Level 4	Teaching qualifications (including PGCE) First degree	BTEC National HNC/HND Higher Education Certificate Higher Education Diploma LCCI Advanced Level NVQ Level 4 Nursing (SRN) RSA Advanced Certificate RSA Higher Diploma
Level 5	Higher Degree	Continuing Education Diploma NVQ Level 5 Other high level professional qualifications

\* BTEC National award is classed as a Level 3 qualification but is not classed as a **full** Level 3 qualification

## Part B

## Your income and your spouse or partner's income

**Your income and your spouse or partner's income**

To be completed by the ALG applicant and your spouse or partner (if you have one).

For ALG you are assessed on income from the previous tax year (2009-10). Your personal living arrangements are taken into consideration for this assessment.

If you are single we will assess you on your personal income. This must be **£19,513 or less** for you to be eligible for support.

If you are married or live with someone as if you are married to them we will assess your joint income, which must be **£30,810 or less** for you to be eligible for support.

If you are married or live with someone as if you are married, but you are both students who apply for ALG, we will discount the spouse's or partner's income from the financial assessment and you will be assessed as a single learner.

We will not take account of your parents' income if you are still living with them.

You and your spouse or partner (if you have one) must both complete Income Details (Part B) of this form and Income Details, Benefits (Part C) if applicable.

Tell us how much income you received in the tax year (2009-10). Do not tell us how much income you **currently** receive.

**If you are receiving Incapacity Benefit, Employment and Support Allowance (ESA), Jobseeker's Allowance or Income Support, you cannot claim ALG; you must stop receiving these benefits first. We strongly recommend that you speak to your Jobcentre Plus adviser if this applies to you to ensure this is the right decision for you.**

SAMPLE

**Information about the Disability Discrimination Act 1995 (DDA)**

If at the time of applying your household income is lower than it was in the tax year 2009-10, and this is due to disability as defined by the DDA, we may be able to take your current household income into account for ALG assessment purposes.

Please read the information below carefully. If you feel that the circumstances described here apply to you or you need further information, please call us on **0800 121 8989** and we will advise you how to complete the application. You must be aware that the onus will be on you to prove the disability by means of a medically based statement. We will provide you with details of what we can accept when you call us.

**Some basic information about the Act which may help you**

The DDA defines a disability as a physical or mental impairment which has a substantial and long term (that is more than 12 months) adverse effect on a person's ability to do normal daily activities. If you would like to know more about the DDA and whether your medical condition is covered, then further information can be found at **[www.equalityhumanrights.com](http://www.equalityhumanrights.com)**

The Act sets out the circumstances in which a person is 'disabled'. It says you are disabled if:

- you have a mental or physical impairment
- this has an adverse effect on your ability to carry out normal day-to-day activities
- the adverse effect is substantial
- the adverse effect is long-term (meaning it has lasted for 12 months, or is likely to last for more than 12 months or for the rest of your life).

**What are 'normal day-to-day activities'?**

At least one of these areas must be substantially affected:

- mobility
- manual dexterity
- physical co-ordination
- continence
- ability to lift, carry or move everyday objects
- speech, hearing or eyesight
- memory or ability to concentrate, learn or understand
- understanding of the risk of physical danger

There are some special provisions, for example:

- if your impairment has substantially affected your ability to carry out normal day-to-day activities, but doesn't any more, it will still be counted as having that effect if it is likely to do so again
- if you have a progressive condition and it will substantially affect your ability to carry out normal day-to-day activities in the future, you will be regarded as having an impairment which has a substantial adverse effect from the moment the condition has some effect on your ability to carry out normal day to day activities
- cancer, HIV infection and multiple sclerosis are covered effectively from the point of diagnosis
- people who have had a disability in the past but are no longer disabled are covered by certain parts of the DDA.

If you are single and your income in 2009-10 was lower than £11,810; or if you have a spouse or partner and your joint income in 2009-10 was lower than £20,817 then you would already qualify for the maximum rate of ALG, even if your income has reduced further due to disability. If these circumstances apply then there is no need to ring us, simply continue to complete the application on the basis of your 2009-10 income.

If you have read the information but are still not sure what to do please call us on **0800 121 8989**.

### Examples of Reduction in Income

Note: this will only be of benefit to you if your income or your joint income has reduced.

Here are some examples:

- If you are single and your income in the 2009-10 tax year was more than £19,513 you would not have been eligible for ALG. However, if your income has now dropped below this amount due to disability you may now be eligible for ALG, please call us on **0800 121 8989**
- If your income and that of your spouse or partner was over £30,810 in the 2009-10 tax year but has now dropped below this amount due to disability you may now be eligible to claim ALG, please call us on **0800 121 8989**
- If you are single and your income in 2009-10 was £19,000 but it has now reduced to £12,000 due to disability, you may now be eligible for a higher rate of ALG. Please call us on **0800 121 8989**
- If you have a spouse or partner and your joint income in 2009-10 was £28,000 but it has now reduced to £22,000 due to disability, you may now be eligible for a higher rate of ALG. Please call us on **0800 121 8989**.

### Question B3

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

If you have a Tax Credit Award Notice (TCAN) form TC602 that correctly states your income and that of your spouse or partner for the tax year 2009-10 put the amount in this box and send us your Tax Credit Award Notice.

You will receive an Award Notice if you receive child tax credit or working tax credit - an example of what it looks like is shown on page 17. Make sure the Award Notice refers to your income for the whole of the tax year 2009-10.

**Do not** send us a Review Notice (Form TC603R).

Please send us your Award Notice with the application. You are encouraged to send us a photocopy but this **must** be a clear copy that contains all the pages. However, if you decide to send us the **original Award Notice**, this will be returned to you when we have processed the application.

If you have an Award Notice but it does not show your total income for the tax year 2009-10, or shows zero income - perhaps because you were on Income Support when you applied - mark the 'No' box.

If you do not have an Award Notice for the tax year 2009-10 or you do not wish to wait for the Award Notice to be sent to you after the end of the tax year, you can apply using a P60 or other evidence of your income. For more help, call **0800 121 8989**.

For more information about Tax Credits, visit [www.hmrc.gov.uk/taxcredits](http://www.hmrc.gov.uk/taxcredits) or call the Tax Credits Helpline on **0845 300 3900** (textphone 0845 300 3909).

**Did you mark the 'Yes' box?** Fill in the amount of income from the Award Notice in the box where we have asked for it, rounded down to the nearest pound. Now go straight to the declaration at B12. You do not have to fill in Income Details, Benefits (Part C).

**Did you mark the 'No' box?** If so, go to question B4.

Question B3

(Continued)  
Tax Credit Award  
Notice example.  
Please see page  
16 for additional  
guidance

**HM Revenue & Customs**

Reprint-reference--X 999

MR KURT STONE  
MRS GRACE STONE  
1 ANY STREET  
ANYTOWN  
ANYWHERE  
XX00 0XX

Helplines 08:00 to 20:00  
0845 300 3900  
Minicom/Textphone  
0845 300 3909

TAX CREDIT OFFICE  
PRESTON  
PR1 0SD

Date 18 May 2010

**Tax credits award for 06/04/2010 to 05/04/2011**

MR KURT STONE National Insurance number AB 44 67 88D  
MRS GRACE STONE National Insurance number PY 56 57 58A

Summary	
<b>Tax credit for the period - see Part 2</b>	
Working tax credit (other than childcare)	£85.37
Child Tax Credit	£4268.30
<b>Amounts still to be paid to you - see Part 3</b>	
Working Tax Credit to MR KURT STONE	£85.37
Child Tax Credit to MRS GRACE STONE	£4268.30

Tax credits are based on your personal circumstances and income for the whole tax year. After the end of the tax year, when all the information is known, we make a final decision about how much you are entitled to receive.

**Part 1** of this form shows your circumstances, including your income. Please check this part and tell us immediately if anything is wrong, missing or has changed.

**Claimants**

Your tax credits are based on you being part of a couple. If you have separated, please tell us. You may be able to make a new claim to tax credits, either on your own or as part of a new couple.

**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 2009 to 5 April 2010**

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

If you have a Tax Credit Award Notice, write in your total income from 6 April 2009 to 5 April 2010 as shown here - not the amount of tax credits you are receiving. This diagram may help you.

Question B4

Write in your total earnings as an employee from all jobs before taking off Tax and National Insurance contributions

**Where to find details of your pay from employment in the year 6 April 2009 to 5 April 2010 (2009-10)**

All of your employers in 2009-10 should have given you a record of your earnings. This will be a P60, or a P45 if you left before 5 April 2010.

**If you had only one job in the year 2009-10**, copy the figure labelled 'Total for year' on your P60, or 'Total pay to date' on your P45.

Pay	p
employment(s)	
employment *	9,283.91
total for year	9,283.91
taxes & Orphans/Life contributions in this employment *	

Code	503L	Week	
Week or month number	W26	Month	
Total pay to date	£	9283	91
Total tax to date	£	1336	42

**If you had more than one job**, add together the 'in this employment' figures from all your P60s and P45s.

**If you are an employee, do not leave this box blank. You should only answer this question if you marked the 'No' box for question B3.**

**Before you write in the total(s), read the notes below**

Enter your total income from all your paid employment in the year 6 April 2009 to 5 April 2010. We need to know your total earnings for the year before tax, National Insurance contributions and other deductions are taken off. Look for the figure usually described as 'total pay' or 'total for year' on your P60 Certificate.

**If you had more than one job in the year** – one after the other or at the same time – we need information about your **total** pay from all of them.

**Include**

- total pay from all your employed work, including any tips and gratuities and Statutory Sick Pay
- payment from your employer because your job changed or ended. Don't include the first £30,000 - only include any amount you got over that
- taxable gains from security options you got because of your job, for example, company shares or bonds
- strike pay which you received from your trade union
- payment for work you did in prison or on remand.

**Deduct**

- work expenses you have paid out and that your employer has not paid back to you. The expenses must be wholly, exclusively and necessarily in the performance of your duties
- tax-deductible payments you have made and have not been paid back for. For example fees to professional bodies, indemnity insurance, agency fees
- flat-rate expenses agreed by your employer and HM Revenue & Customs, to maintain or renew tools or special clothes (such as a uniform) you need for your job.

If you had more than one job, use the working sheet below to help you work out your total earnings.

	Applicant	Partner
Job 1		
Job 2		
Job 3		
Job 4		
<b>Total</b> (round down to the nearest pound)		
	Enter this total on the form	Enter this total on the form

**If you write anything for question B4, you must send any P60, P60U or P45 form(s) you have relating to the tax year 2009-10 with the application.** You are encouraged to send us clear and complete photocopies. However, if you decide to send us **original evidence** we will return this to you when we have processed the application.

**Go to question B5.**

**Question B5**

Write in the value of any benefits in kind from your employer

You may have received benefits from your employer which were not paid out in wages but are taxable. These are called benefits in kind. If you received any benefits in kind during the year 6 April 2009 to 5 April 2010 your employer should tell you their 'cash equivalent' on either a form P9D or P11D.

For ALG purposes you only need to include certain benefits in kind. If you have not received a form P9D or P11D for the year 6 April 2009 to 5 April 2010 and you think you should have, ask your employer. If you have received a P9D or P11D from more than one employer, add the figures together to show the total amount received from all employers.

For ALG purposes we take into account the value of the following benefits in kind:

- goods and assets your employer gave you (for example, gifts of food, fuel, cigarettes or clothes) - shown on form P11D section A or P9D section A(2) in the third and fourth boxes
- payments made by your employer on your behalf (for example, payment of rent or utility bills) - shown on P11D section B in the first box numbered 15, or P9D section A(2) in the first, second and fifth boxes
- cash or non-cash vouchers and credit tokens (for example, a company credit card) - shown on P11D section C, or P9D section B (add together all the boxes). Don't include the cash equivalent of childcare vouchers if they are used to pay for registered or approved childcare

- mileage allowance. Include payments for using your own car – enter the taxable amount shown on form P11D section E. Also include running costs your employer has paid for - shown on P11D Section E or included in Section N. If your mileage costs are not paid by your employer, or they only pay a little of it, please call us on **0800 121 8989**
- company car - shown on P11D in box 9 of section F
- car fuel benefit – shown on P11D in box 10 of section F
- expenses payments made to you or on your behalf - shown on P11D sections J, M or N or P9D section A(1). You might be able to reduce this amount by claiming a deduction of expenses allowed for certain Income Tax purposes.

**If you write anything for question B5, you must send us any P9D or P11D forms you have relating to the tax year 2009-10 with the application.** You are encouraged to send us clear and complete photocopies. However, if you decide to send us **original evidence** we will return this to you when we have processed the application.

**Go to question B6.**

**Question B6**

Write in your total income from self employment

If you are self-employed (either on your own or in partnership) you must enter your total profit for the year to 5 April 2010.

- if you have more than one business, you must enter the total profit from all your businesses
- if your business had other income or profits you must include these in the amount – for example, rental income
- if you use averaging because you're a farmer, market gardener or creator of literary or artistic works, you can't use averaging in your ALG claim. So you need to adjust your total profits figure to take out the averaging
- if you traded outside of the UK in 2009-10 you should enter your profit in **British pounds**, not the foreign currency
- if you made Gift Aid payments or personal pension or retirement annuity contributions you need to deduct the **gross** amount
- if your business made a trading loss in the tax year 2009-10 enter '0'. However, the ALG rules on trading losses operate separately from those for Income Tax. This means that for ALG purposes you deduct the trading loss from
  - any other income you may have had for the year
  - in a joint claim, any other income which you and your spouse or partner may have had for the year.

**Example SA302**

HM Revenue Self Assessment - Tax Calculation	
Mr Frank Peach	
<b>Tax Calculation for 2009-10</b>	
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
<b>Total Income</b>	<b>18,500</b>

If you have a Self Assessment Tax Calculation form (for example, an SA302) for the tax year 2009-10, please send it to us with the application. You are encouraged to send us a photocopy but this **must** be clear and complete. However, if you decide to send us the **original document** we will return this to you when we have processed the application. If you do not have a Self Assessment Tax Calculation form please call us on **0800 121 8989 for advice.**

**Go to question B7.**

Question B7

Work out the total for you and your spouse or partner of any other income, including pensions, over £300

In addition to social security benefits and earnings from your work, we also take into account any other income received in the year 6 April 2009 to 5 April 2010. You **must** use the table on the application form to work out your total. Include any **other income** above £300, plus the **full** amount of any **Adult Dependant's Grant** and **miscellaneous taxable income**.

**Do not include:**

- maintenance received from a former partner
- Working Tax Credit and Child Tax Credit
- student loans - do not deduct student loan repayments from your income
- other student grants (except the Adult Dependant's Grant), such as those to meet the cost of tuition fees, child care etc
- war pensions, or pensions or annuities payable under German or Austrian law to victims of Nazi persecution
- income your children may have had, unless it is taxable in your name or your partner's name.

**Example below**

B7 - Other Income			
Work out the total for both adults of any <b>other income, including pensions</b> , using the table below.			
<b>Annual amount of:</b>	<b>Applicant</b>	<b>Partner</b>	
Income from savings and investments	3 0 0		
Income from property			
Trusts, settlements and estates	3 9 1	5 0 0	
Foreign income			
Pensions (state, occupational or personal)	1 2 0 0 0	4 1 1 2	
Notional income	1 6 0 4		
Now add together the totals	1 4 2 9 5	+	4 6 1 2 = 1 8 9 0 7
		Now deduct £300	- 3 0 0
<b>Total</b> (if this makes a minus figure, just enter £0)			8 6 0 7
Adult Dependant's Grant or miscellaneous taxable income (include the full amount)			5 0
<b>Total other income</b> (round down to the nearest pound)			£ 1 8 6 5 7

For income paid in a foreign currency, state the equivalent in British pounds. See pages 21-22 of the Guidance Notes.

**Income from savings and investments**

- include gross interest on savings, investments and dividends (including interest from any bank or building society). Enter the gross amount (before tax is taken off)
- do not include Individual Savings Accounts (ISAs) or other tax-free investments
- include the full amount of any 'chargeable event gain' from a life insurance policy

**Income from property**

- include income from property or land in the UK that you let
- do not include income from the 'rent a room' scheme (if you let a furnished room in your home for £4,250 a year or less)
- do not include anything you have already included in box B6
- if your rental property made a loss, please call us on **0800 121 8989**

**Trusts, settlements and estates**

If you received income from a trust, settlement or estate you will find details on certificate R185, which the trustees or administrators should have given you. Enter the **gross** amount - add together the 'net' amounts and 'tax paid' or 'tax credit' amounts.

**Foreign income**

- foreign income, for example, income from investments and property overseas. Include the full amount in **British pounds**, whether or not it was remitted to the UK. You should enter the **gross** amount in **British pounds**
- if you get a foreign pension include 90% of it here (in **British pounds**). Deduct any bank charge or commission you paid when converting foreign currency.

If you were employed or self-employed outside of the UK in 2009-10, you should enter this amount (in **British pounds**) in boxes B4, B5 or B6 as appropriate. If this is the case, you will need to send us the required income evidence.

**Pensions (state, occupational or personal)**

- state pensions (including Widow's Pension, Widowed Mother's Allowance, Widowed Parent's Allowance and Industrial Death Benefit). Do **not include** the Christmas bonus and winter fuel payment
- other UK pensions you are getting (not war pensions)
- if your pension includes an extra amount for work-related illness or injury, exclude that extra amount.

**Notional income**

This includes things like stock dividends, or income that you could have received but chose not to. Please call us on **0800 121 8989** if you need more information on this.

**Adult Dependant's Grant or miscellaneous taxable income**

If you or your partner received Adult Dependant's Grant for being a student or miscellaneous taxable income not included above, enter it here. You need to include the **full** amount. Please call us on **0800 121 8989** if you need more information about this.

**Go to question B8.**

## Question B8

Write in any personal pension contributions you paid into a registered scheme. Enter the gross amount

Include any personal pension contributions you paid into a registered scheme. Include Free-Standing Additional Voluntary Contributions and payments to Stakeholder pensions. Enter the gross amount. Do not include contributions you paid through your employer. Your employer will have already deducted your contributions from the pay figure entered on your P60 or P45.

**Go to question B9.**

## Question B9

If you or your spouse or partner received Statutory Maternity, Paternity or Adoption Pay

If your payments were more than £100 a week, then multiply the number of weeks by £100 and put this total in the box at B9. For example, if you got them for 30 weeks, enter £3000.

If your payments were less than £100 a week, then multiply the number of weeks by the amount you received and put this total in the box at B9. For example, if you got £80 for 30 weeks, enter £2400.

Do not include Maternity Allowance. This is not counted for the purposes of ALG, so please do not include it on the ALG application form.

## Question B10

Did you or your spouse or partner receive any of the following benefits for any part of the tax year 2009-10?

Income Support, Pension Credit, Carer's Allowance, Jobseeker's Allowance, Incapacity Benefit, Employment and Support Allowance or Bereavement Allowance

If either you or your spouse or partner received Income Support, Pension Credit, Carer's Allowance, Jobseeker's Allowance, Incapacity Benefit, Employment and Support Allowance or Bereavement Allowance for the whole, or part of the tax year 2009-10, you should mark the 'Yes' box.

If you did not receive any of these benefits in the tax year 2009-10, you should mark the 'No' box and go to question B11.

Did you mark the 'Yes' box? **If so you will need to fill in your details and the benefits you received in Income Details, Benefits (Part C). Send Part C to the office that normally deals with your benefits for completion, then return it to us with the rest of your application.**

**Now go to question B11.**

## Question B11

During the tax year 2009-10, did you or your spouse or partner receive any of the 'other' kinds of income?

During the tax year 2009-10, did you or your spouse or partner receive any of the 'other' kinds of income? Below are types of income/benefits that we do not take into account when we assess your income and that of your spouse or partner (if you have one) but we still need to know about them:

- Benefit paid for a period of incapacity that began before 1995 and for which Invalidity Benefit used to be payable or any child dependency increase with these payments
- Child Benefit
- Child Tax Credit
- Council Tax Benefit
- Disability Living Allowance
- Income your children may have had
- Maintenance received from a former partner
- Maternity Allowance
- Pension Christmas Bonus
- Student loans or grants (except The Adult Dependant's Grant) to meet the cost of tuition fees, childcare etc
- Tax-free savings income
- War pensions
- Winter Fuel Payment
- Working Tax Credit

**If you or your spouse or partner received some other kind of income not shown above, please call us on 0800 121 8989 for advice.**

If you or your spouse or partner received any of these types of income/benefits for all of the tax year 2009-10, or just part of the year, tell us the details in the box provided. You do not need to tell us how much income you received; only what kind(s) of income it was and when you received it. See examples below.

*Please write the type of income you received and when you received it in here:*

*Child Tax Credits from 6 April 2009 to 30 September 2009 then got a job and this is shown in Income Details (Part B) and I've supplied my P60 as evidence.*

*Maintenance from ex-partner and child benefit for the whole tax year.*

If you or your spouse or partner did not receive any income in the tax year 6 April 2009 to 5 April 2010 tell us in the relevant box how you have supported yourself e.g. supported by parents/partner.

**Now go straight to the declaration at B12.**

If you or your spouse or partner received any social security benefit payments during the tax year 2009-10 you must fill in Income Details, Benefits (Part C), if appropriate.

## Question B12

Privacy Notice and  
ALG applicant and  
spouse or partner  
Declaration

**ALG applicant only**

Your ALG application is assessed using your income and your spouse or partner's income (if you have one). As the application form contains your spouse or partner's financial details, it is important that we know if you will let us talk to them about your application. We will not give out information about your application or payments to anyone without your agreement. This includes giving out information over the telephone or by post.

**Box A**

If you agree to let us talk to your spouse or partner we will ask them about details on your application form as a security measure before we talk to them.

If you do not mark this box you are saying that we can discuss your ALG application with the person you named as your spouse or partner on the form. If you mark Box A, we will not discuss your application with the person named as your spouse or partner in Income Details (Part B) of the form. Please call us on **0800 121 8989** for help with this.

**Box B**

The Young People's Learning Agency for England (the YPLA) would like to find out what you think about the education or training that you receive. They may wish to contact you about taking part in surveys and research. If you do not mark this box, you are saying that you are happy to be contacted. If you mark this box, we will not contact you.

**Box C**

This box tells us whether the YPLA can contact you about courses or learning opportunities that may be of interest to you. If you do not mark this box, you are saying that you are happy to be contacted. If you mark this box, we will not contact you.

We will never pass any personal information to other organisations for marketing or sales purposes.

**Read the Declaration very carefully**

You are not required to sign and date your application, but by submitting the application form, you and your spouse or partner are telling us that:

- you have read and understood these Guidance Notes
- you have read and understood the Privacy Notice and
- you understand that you must have completed question A8 Residency on the application form and have understood the residency conditions on pages 8-9 of these Guidance Notes.

If you are accepted for ALG, you are also agreeing to the rules of the scheme.

Finally, send your application to us in the pre-paid envelope:

**FREEPOST RRUB-BEXE-TJLK**  
**Learner Support Service**  
**Darlington**  
**DL1 4WD**

## Who fills in Income Details, Benefits (Part C)?

### Only fill in your details in Part C if:

You are the ALG applicant or the spouse or partner of the ALG applicant and either of you received any of the following social security benefits in the tax year 2009-10:

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

### What you need to do

You need to fill in the ALG applicant details in the boxes provided on Income Details, Benefits (Part C). These should be the same details that you used in Learner Details (Part A) and Income Details (Part B).

Your spouse or partner if you have one should fill in the other side of Part C as well if they received any of the benefits above during 2009-10.

When you have filled in Part C, send it to the office that normally deals with your benefits for them to complete.

Once complete send Part C to us with the rest of your application using the pre-paid envelope provided.

## Other information

### What to do now. Please ensure you have:

- enclosed evidence of your Bank or Building Society account that shows name, home address, account number, sort code and roll number (unless you received ALG between September 2009 and August 2010 and will continue to use the same account)
- included any income from you or your spouse or partner (if you have one) for the tax year 2009-10 in Income Details (Part B) and Income Details, Benefits (Part C)
- enclosed income evidence for 2009-10 for you and your spouse or partner
- listed the benefits received in 2009-10 on Part C and had this completed by your benefits office.

Send back the parts of the form that you have filled in, along with any evidence that we have asked for. You are encouraged to send us photocopies but these **must** be clear and complete. However, if you decide to send us **original evidence** this will be returned to you when we have processed the application.

When you send the application to us, please use the pre-paid envelope provided and **do not** fold the form.

### What happens next

Normally, within three weeks, we will write to tell you whether or not you could be eligible for ALG. The letter we will send you is called a Notice of Entitlement (NoE). This will tell you how much you could get **if** you enrol on a valid learning programme. Your Learning Provider will complete the final check to see if your course is eligible for ALG. They will complete this final check when you enrol.

You will need to take your NoE with you when you enrol for ALG. **Without the NoE your Learning Provider cannot add you to the ALG payment system and you cannot receive weekly payments.** Your NoE is only valid for the academic year 2010/11. Please note your NoE is **only** valid for courses that are eligible for ALG support.

# Confirmation of Bank/Building Society Account Form

If you do not have a statement or letter from your bank or building society showing your name, address and full account details, tear off this page and ask your bank or building society to fill in the form below. You will need to enclose it with your ALG application.

To: **Learner Support Service**

We confirm that the following person has an account with us which is able to receive automatic payments made via the UK BACS system:

Name of Bank/Building Society .....

Branch .....

Full name of account holder .....

Account holder's address .....

..... Postcode .....

Sort code \_\_\_ / \_\_\_ / \_\_\_

Account number \_\_\_\_\_

Roll number (if applicable) \_\_\_\_\_

If the account does not have a roll number, please cross out this line

Stamp\*

\* Please note that we are unable to accept this form without an official stamp.

Signature of Bank/Building Society employee.....

Name.....

Date.....

Once this form is completed, please return it to the account holder so that they can include it with their ALG application.



April 2010

Young People's Learning Agency © 2010

tear along this line

SAMPLE