

## EDUCATION MAINTENANCE ALLOWANCE (EMA) SESSION 2017/18

### What you need to do:

- **Read this and the application form (normally enclosed with this guidance).** We need enough information from you to complete our checks. We'll do this as soon we can and only return applications when we have to.
- **Check the income, age criteria & deadlines below** to see if you qualify:

Taxable Household Income (6 <sup>th</sup> April 2016 – 5 <sup>th</sup> April 2017)*	No. of dependent children in the household	Award
£0 - £24421	1	£30
£0 - £26884	2+	£30

\*If the income last year was higher than the maximum but your income this year will be below because of a change in circumstances, you may still qualify for EMA. Please call us on 01324 503850 for more information.

Age	Can be paid from*	Late Applications*
16-19 on or before 30 September 2017	Week ended 26 August 2017 <b>(if we receive your application by 30 September 2017)</b>	Applications received between 1 October 2017 & 31 March 2018 can be paid from the week we first receive your application. <b>No applications accepted after 31<sup>st</sup> March 2018</b>
16 between 1 October 2017 & 28 February 2018	Week ended 12 January 2018 <b>(if we receive your application by 28 February 2018)</b>	Applications received between 1 March 2018 and 31 March 2018 can be paid from the week we first receive your application. <b>No applications accepted after 31<sup>st</sup> March 2018</b>

\*Deadlines for applications made under the activity agreement scheme may differ. You may not always be paid from your start date (first engagement). Please contact us for further information.

- **Use a pen.** We can't accept applications completed in pencil. Please use blue or black ink and if you make a mistake, put your initials beside the changes. Please also make sure you've got the correct year's application form; these change every year and a previous year's form can't be used.

- **Keep your school record up to date.** The information held on your school record is also used for EMA. If you've moved address or live with a different parent/carer, please make sure your school/learning centre has been told. Your application may be delayed if the address or other information held is different from that shown on your school record.
- **Post your application to us** with the evidence we need to check you qualify:  
**post** to the following address:  
 Assessment Team  
 Falkirk Council  
 Revenues & Benefits  
 Callendar Square Centre  
 Falkirk  
 FK1 1UJ

or take to a Falkirk Council One Stop Shop or Advice and Support Hub

**A FIRST CLASS STAMP WILL NOT BE ENOUGH IF POSTING YOUR APPLICATION FORM. IF DELIVERY OF YOUR APPLICATION IS DELAYED BECAUSE YOU DIDN'T HAVE ENOUGH POSTAGE, YOU MAY LOSE EMA PAYMENTS.**

## What we will do:

1. Log your application, copy any original evidence received and send the originals back to your parent/carer.
2. Check the information given in your application against your evidence and any details we already hold about you.
3. Write to you if we need any more information or evidence.
4. Complete our checks and write to you to confirm if you qualify as soon as we can.

Please note that this may take up to 30 working days in peak periods – check our blog for current processing times.

### **DATA PROTECTION ACT**

The Council is under obligation to manage public funds properly. We may check information provided by you, or information about you provided by a third party, with other information held by us. We may also get information about you from certain third parties, or give information to them, to check the accuracy of information, to prevent or detect crime, or to protect public funds in other ways, for research and statistical purposes, as permitted by law. These third parties include other government departments.

- Education Maintenance Allowance (EMA) is a programme funded by the Scottish Government and administered to Local Authority Education Departments for schools throughout Scotland. The Scottish Government and Local Authorities are controllers in relation to your information.
- The information you supply shall be used for the purposes of assessment, award, payment, and where necessary, recovery of the EMA and we will provide information to the Scottish Government, all in accordance with the requirements in the Scottish Government EMA (Scotland) Business Model.
- We may check information provided by you, or information about you provided by a third party, with other information held by us. We may also get information about you from certain third parties, or give information to

them, to check the accuracy of information, to prevent or detect crime, or to protect public funds in other ways, for research or statistical purposes, as permitted by law. These third parties include other government departments.

- We will not disclose information about you to anyone outside our Local Authority unless the law permits us to.

### **Section 1 (a): YOUNG PERSON'S PERSONAL DETAILS**

- Please give us your original birth certificate or passport as proof of age – we're unable to accept ID cards, medical cards, baptism certificates or photocopies.
- Enter your date of birth using DD MM YYYY format. For example if you were born on 12 April 2001, enter 12 04 2001

### **Section 1 (b): YOUNG PERSON'S NATIONALITY AND RESIDENCY DETAILS**

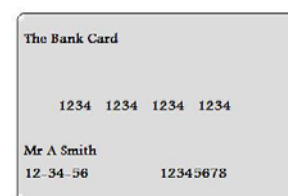
- To get EMA, you must meet the nationality and residency requirements of the programme which generally mean you must have lived in the UK for at least 3 years before your school term start date. You must also have been living in Scotland at the start of your EMA term. More information about nationality and residency can be found in the EMA Guidance Document on the EMA website [www.emascotland.com](http://www.emascotland.com)
- If you've not lived in the UK for the past 3 years you must give us evidence of your residency status. This may be your passport, Visa or leave to remain letter.

### **Section 2: YOUNG PERSON'S COURSE DETAILS**

- Tell us where you will study or train during this 2017/18 year.
- If you intend to study or train between two schools, school and college or other learning centre(s) over the same period, complete with details of the place at which you will spend the most time.
- To get EMA at school, you must go for a minimum of 21 guided learning hours (timetabled hours including study periods). This normally means you need a full timetable. If you've left school and are now doing an activity agreement, you must go as timetabled on your learning programme.

### **Section 3: YOUNG PERSON'S BANK/BUILDING SOCIETY ACCOUNT**

- To get EMA you must have a bank account solely in your own name (a parent's "in trust for you" account can't be used). If you have additional support needs and have difficulty operating your own bank account you can ask us to make payment to someone else. If you do so we will contact your school or activity agreement advisor for supporting information and may contact you again before continuing the assessment. In all other cases you must have your own account.
- To get EMA you must have a bank/building society account which allows payments by BACS (Bank Automated Credit System) transfer without a roll/ref number. If you're unsure, check your account number – if this is made up for mostly the same digits (999999999, 33444444 for example) it may need a roll/ref number to get payments and you will need to open a new account. Please check with your bank/building society.
- Sort code – this is a 6 digit number.
- Account number – this is an 8 digit number.



- Please don't use the 16 digit number which appears across the card.
- Payments will normally be paid directly into your bank/building society account every 2 weeks depending on school/local holidays.

#### **Section 4: YOUNG PERSON'S INDEPENDENT STATUS**

- If you don't live with your parents/carers and get benefits payments (income support/employment & support allowance) in your own name, please give us an up-to-date Benefits (DWP) letter. If you can't get this, please tear off part C and send to the Department for Work and Pensions (DWP) to be completed.
- If you are living under the care of the Council, for example with a foster carer, please give us a signed letter from the Social Work department confirming your address and circumstances.

#### **Section 5: YOUNG PERSON'S FAMILY DETAILS**

- Please tick the right box(es) for your household. Please tell us everyone who lives with you, including anyone aged over 18.
- If you've ticked the box to tell us that you live on your own, you don't need to fill in parent/carer details in this section.
- If you've ticked that you don't live with a parent/carer but are still under their guardianship or financial support, please complete their address details. We'll still need to check their income details for your application.
- We use the term 'parent' to refer to your mum, dad, carer, step-parent or parent's partner.
- The term 'partner' as it appears can refer to your own husband or wife, civil partner or live-in partner.
- If your parent/carer doesn't receive Housing Benefit or Council Tax Reduction please give us a 2017-18 Child Benefit entitlement letter or a full 2017-18 Tax Credit Award Notice showing your name and the name of any brothers or sisters as proof of guardianship and other dependent children. We can no longer accept bank statements. If you live on your own or with someone other than the person who receives Child Benefit payments please give us an explanation on the additional information page. Your application may be delayed until guardianship can be confirmed.
- Please include proof of any other dependent children not shown on the Child Benefit award letter/Child Tax Credits/DWP letter, for example any brothers/sisters who go to college/university fulltime. You will also need to give us a college enrolment letter or SAAS award letter in their name(s).
- If you don't give us proof of other dependent children, your parent/carer's income must meet the maximum income threshold for a single dependent child and you can't benefit from the higher income threshold.

- If you live in a lone parent household, we will check Housing Benefit or Council Tax records for proof. If a brother, sister or anyone else aged 18 or over also lives with you (including grandparents), please make sure their names and relationship to you are written on the application form.

### **Section 6 (a): HOUSEHOLD INCOME**

- If you get Income Support or Employment & Support Allowance in your own name or if you're in care, you don't need to complete Section 6. You do need to give us proof of your benefit income or a letter from Social Work (see section 4).
- If you're living with your parents/carers or their partners, their income must be included for our checks. If your parents/carers get Housing Benefit or Council Tax Reduction we will check our records for proof of income.
- If your parents/carers don't get Housing Benefit or Council Tax Reduction, they need to send us a full Tax Credit Award Notice (TCAN) TC602 from HM Revenue and Customs (HMRC) for 2017/18 showing actual and not estimated income for 2016/17. We don't need to know how much working or family tax credit amounts are paid to your parents/carers. Information shown on a TCAN can vary and we may still have to ask for further evidence. We can't use a Tax Credit Review Notice as it doesn't show enough income information to complete our EMA checks.
- Remember our checks on your EMA application will normally be based on your household income for the period 6 April 2016 – 5 April 2017 so your evidence must cover these 12 months in full. The only time we can use this year's evidence (6 April 2017 – 5 April 2018) is if your household income was above the maximum limit but there's now been a change in circumstances - job loss/change, separation, for example, which means your household income has now fallen below the maximum limit. If you wish us to consider this year's income you need to tell us why and provide proof of both years' income. Please contact us on 01324 503850 if you need more information.

### **Section 6(b): HOUSEHOLD INCOME**

- If your parents/carers don't get Housing Benefit or Council Tax Reduction and don't have a Tax Credit Award Notice (TCAN) TC602 showing actual, not estimated income for 2016/17, you need to complete section 6b and give us evidence as follows:

#### **Social Security (DWP) Benefits Income**

- If your parents/carers got benefits in 2016/17 please give us a P60U certificate or DWP letter to cover the correct dates. If you need a blank Certificate of Benefits Received form to send to DWP for completion please contact us. Please note that this completed form will be returned by DWP to your parents/carers and will then need to be forwarded on to us.

#### **Employment income**

- A 2016/17 P60 confirming earnings from employment, or a valid week 52/month 12 payslip, providing these show year-to-date (cumulative) income.
- We can usually complete most EMA checks on employment income from a Tax Credit Award Notice (TCAN) TC602 or a P60/payslip. If you need detailed guidance on employer benefits or allowable

deductions such as pension contributions, fees and subscriptions to professional bodies please contact us on 01324 503850.

### **Self-employment income**

- A 2016/17 Self-Assessment Tax Calculation (SA302) or finalised online Self Assessment Tax Calculation Summary. If these are not yet ready *and* you are applying in time for your application to be approved by 3<sup>rd</sup> November, your parent/carer's Accountant needs to complete Part B. If your parent/carer doesn't have an Accountant please tell us on the additional information and give us the Tax Credit Award Notice (TCAN) showing estimated 2016/17 self-employment income. These can only be accepted on a temporary basis until the SA302, online summary or finalised TCAN showing actual, not estimated income is ready and given to us. This may mean your application is delayed or dealt with on a temporary basis only. Provisional (temporary) awards are not available after 3<sup>rd</sup> November; late applications may be held under query until you can give us the outstanding evidence. Payments for provisional entitlements are paid only up to end December and you will need to send us all outstanding information to reinstate the entitlement from January 2017. If you don't send us this, your entitlement may be cancelled in full and payments already made may be recovered, including from entitlement in future EMA session(s).
- We can usually complete most EMA checks on self-employment income from a SE302, online summary or Tax Credit Award Notice (TCAN) TC602. If you need detailed guidance on self-employment profit/loss declarations and allowable deductions such as pension contributions and charitable donations please contact us on 01324 503850.

### **Pension Income**

- A Pension P60 or letter from your pension provider (DWP or previous employer) showing actual pension income paid to your parents/carers in 2016/17.
- We can usually complete most EMA checks on pension income from a Pension P60, letter or Tax Credit Award Notice. If you need detailed guidance on pension income please contact us on 01324 503850.

### **Other Income**

- You need to tell us if your parents/carers got any other taxable income in 2016/17 such as bank/building society interest, dividends, property, trust or foreign income over £300 and give us supporting evidence. If you need more information on other income please contact us on 01324 503850.

### **Notional Income**

- Notional income is income your parents/carers could have received but chose not to get or apply for so they could get other income such as more Tax Credits or other benefits. If you need more information on notional income please contact us on 01324 503850.

### **What else?**

Please think about what email address you give us. If it doesn't clearly identify you, we'll ignore it. We'll normally write to you but if you email us, we will check the registered address before replying.

We may have to ask for other information depending on your application and if this is the case, we'll write to you. We may also return your application form and highlight any information or corrections we need from you. Please read our letter and deal with what we ask for before the deadline shown.

Some evidence we ask for are important originals which you may not wish to post by regular mail, for example your birth certificate or passport. You can use recorded delivery, but we can only return these by the same if your addressed envelope is correctly prepaid and marked with the recorded delivery sticker. Recorded delivery returns may not be posted daily so it's possible other letters might be sent to you first. Don't use a printed pre-pay Post Office stamp as these must be used on the date of printing. **We don't accept liability for items lost or delayed in the post and can't pay for new evidence.**

**Double check!** Please be very careful when providing your bank details. If you give us incorrect information, it can take up to 6 weeks to trace and may result in a loss of payment. Please only give us a 6 digit sort code and a personal 8 digit account number; we can't pay to an account which needs a roll or reference number. If you're unsure, please check with your Bank.

**Remember, your application needs to be with us by the deadlines shown in this guidance. If you are near a deadline and don't have all the evidence please give us your application with whatever evidence you do have.** We'll log and check it then return your application to you for the rest of your evidence. If you send us your application after the deadline you can only be paid from the week we first receive it.

If you are applying under the Activity Agreement Scheme please do so as soon as possible. If you send us your application late you may not always be paid from your start date (first engagement).

When we complete our checks and confirm you can get EMA, we'll send you a notice of entitlement letter and a learning choices agreement (LA). This LA must be signed and taken to your school/learning centre. We'll also send you an EMA handbook which tells you more about your entitlement, learning agreements and a note of payment dates. It also tells you what you need to do if you're ill so you need to keep it safe.

If you are home educated, please contact us on 01324 503850 for further information.

If you get stuck, don't worry! Check the EMA page of the Falkirk Council website: <http://www.falkirk.gov.uk> and search for EMA, or contact us on 01324 503850.

