Applying for EMA – An Introduction

EMA Guarantee:

• If you received EMA during the 2008/09 EMA year you will be eligible for EMA at the same amount for a period of up to three years (or until the year in which you are 19). You do not need to reapply; this is known as the EMA Guarantee. You will be guaranteed the same level of support you received for the 2008/09 EMA year even if your household income has increased. You will not be required to reapply for EMA, and should not complete this form

• The EMA Guarantee does not apply to learners who received EMA as part of the special arrangements for Entry to Employment (e2e) programmes; if you are planning to progress from e2e to another learning programme, you should complete this form. For more advice or information about EMA please contact us on 0800 121 8989

• If you were awarded EMA of either £10 or £20 or were rejected for EMA support during the 2008/09 EMA year and your household circumstances have changed, e.g. your household income has gone down, you are entitled to reapply from the beginning of the next EMA year. You should complete the enclosed form if you want to know if you have now become eligible for EMA, or if you may be entitled to a higher level of support due to a change in circumstances.

To receive EMA during the 2009/10 EMA Year

• Your date of birth must normally be between 01/09/1990 and 31/08/1993 - see guidance notes Page 3
• You will need a bank/building society account that accepts BACS payments. If you do not have an account – see guidance notes page 10-11
• We need the 2008-09 income details of the adults who are mainly responsible for the young person. For EMA you are mainly responsible for the young person if he/she lives with you
• Send your complete form and the required evidence to us as soon as you can. 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. EMA payments cannot be made until you give your Notice of Entitlement (NoE) to your learning provider

Important - To get EMA you must meet the residency criteria on pages 7-10 of the guidance notes; read these before completing this form. If you DO NOT meet these criteria DO NOT apply for EMA.

• If you are not intending to study in England do not fill this form in - see guidance notes page 10.

Complete this form if you are thinking of starting:

• A full-time further education course at a college or school OR
• An LSC-funded Diploma (where available) or a course that leads to an Apprenticeship from 31 August 2009 OR
• An LSC-funded Entry to Employment (e2e) programme from 29 June 2009 OR
• You are leaving school in the summer of 2009 and are thinking of starting any of the above - see guidance notes page 3.

✍ Filling in this form

• To help you, brief notes are given at each question and more help is available in the guidance notes
• Please fill in the form using BLACK INK and in CAPITAL LETTERS
• 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/ema
Your household benefits will not be affected by EMA payments

What you need to do to apply for EMA

**Step 1** Make sure you have a bank or building society account. We’ll pay your EMA directly into your account. The back pages of the enclosed guidance notes give more information about this, and advice on opening a bank or building society account.

**Step 2** Fill in the EMA application form with your parents or carers. When you send the form in you will also need to enclose:

- evidence of your household income for the relevant tax year. This might be a Tax Credit Award Notice (TC602) or P60 and must be original documents
- something which shows your bank account or building society sort code and account number. This could be a letter or a statement.

**Step 3** Send the form, bank details and income evidence to us using the prepaid envelope.

We will then check if you’re entitled to EMA and if you are we will send you a Notice of Entitlement (NoE) to let you know how much you’ll get.

**Step 4** Enrol on your learning programme. Take your NoE with you when you go to enrol or as soon as possible, as your payments cannot be made without it. You’ll also need to sign an EMA Agreement with your school, college or learning provider.

How can I find out more?

You can get more information about EMA from:

- the guidance notes enclosed
- your school, college or learning provider
- your careers teacher
- your local student support services
- your Connexions personal adviser
- the provider, school or college you want to go to
- [www.direct.gov.uk/ema](http://www.direct.gov.uk/ema)
- our helpline for young people and their parents or carers: **0800 121 8989**

You could get EMA in 2009/10

If the annual income of your household (used for assessment purposes) is up to the relevant EMA threshold:

- for tax year 2008/09 – £30,810

Don’t forget!

*(very important)*

When completing your EMA application form, check that...

- the evidence of household income is for the correct tax year
- you have provided evidence of your bank or building society account
- you have filled in Part C of the application form if you, or your household, were on benefits during the relevant tax year

This EMA Application pack contains:

- This introduction
- Part A of application form, to be completed by the young person
- Part B of application form, to be completed by adult(s)
- Part C of application form, to be completed by adult(s) or young person on Income Support
- Guidance Notes to help you fill in the form
- Pre-paid envelope

Call us on **0800 121 8989** between 07:00 to 20:00 Monday to Friday or visit our website at [www.direct.gov.uk/ema](http://www.direct.gov.uk/ema)
A15 Data Protection Statement and Young Person Declaration

Data Protection

The information you provide on this form will be passed to the Learning and Skills Council (LSC). The LSC 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 the purpose of administration, careers and other guidance, and statistical and research purposes. Other organisations which we may share information with include the Department for Children, Schools and Families, the Department for Innovation Universities and Skills, Connexions, 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 LSC or its partners.

The LSC is also a co-financing organisation and uses European Social Funds from the European Union to directly or indirectly part-finance learning activities, helping develop employment by promoting employability, business spirit and equal opportunities, and investing in human resources. Further information about partner organisations, and what they do, may be found at www.lsc.gov.uk.

Mark box A if you DO NOT wish us to tell Adult 1 (named in B2 of Part B of this form) about the progress of your application and payments.

Mark box B if you DO NOT wish us to tell Adult 2 (named in B2 of Part B of this form) about the progress of your application and payments.

At no time will your personal information be passed to organisations for marketing or sales purposes. From time to time students are approached to take part in surveys by mail and phone, which are aimed at enabling the LSC and its partners to monitor performance, improve quality and plan future provision.

Mark box C if you DO NOT wish to be contacted by the LSC or its partners in respect of surveys and research. The LSC 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.

The LSC or its partners may wish to contact you from time to time about courses, or learning opportunities relevant to you. Please mark box D if you DO NOT wish to be contacted about courses or learning opportunities by post.

Declaration

If you give false or incomplete information, you may be prosecuted. As part of our assessment process we will sample successful 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 have read and understood the guidance notes supplied with this form including the Data Protection Statement above and declare that the information given on this form is correct and complete to the best of my knowledge and belief.

I understand that:
• if I do not keep to my EMA Agreement, or if I leave my learning programme, I will not be eligible to receive further payments; and any EMA overpaid may need to be repaid by me
• I am not allowed to receive EMA payments at the same time as any other government training or learning allowance
• the information I have given may be shared with other agencies or organisations, as allowed by law, for the purposes of checking my application and/or the prevention of fraud
• I may only claim EMA payments if I fulfil the conditions of residency on pages 7-10 of the guidance notes and I have self-certified my eligibility on question A6.

I authorise the Department for Work and Pensions to disclose information regarding any benefits and allowances for the purposes of assessing an application for Education Maintenance Allowance.

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

Now give the form to the adult(s) who are mainly responsible for you, so that they can complete their part of the application; unless you are a young person living independently on Income Support, if so now fill in Part C.

Part A – to be filled in by the Young Person

If we posted the 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, please fill in questions A1 to A3 in full.

If you received EMA during the EMA year 2008/09 you may not need to re-apply for EMA. See guidance notes.
Please call us on 0800 121 8989 for further advice.

A1 Your name
Surname/family name
First name(s)

A2 Your address
House no./flat no./name
Street or Road
District
Town/city
County
Postcode

A3 Date of birth
This must normally be between 1/9/1990 and 31/8/1993, but there are some exceptions – see page 3 of the guidance notes for details.

A3. If any of those details are wrong, please fill in questions A1 to A3. If any of those details are wrong, please fill in questions A1 to A3 in full.

e2e Learners – If you are going to attend an Entry to Employment (e2e) course, take this form to your learning provider to complete this section. You will not have to complete parts B and C. Please see guidance notes page 6

UPIN
Learning Provider contact number
Name of Learning Provider
Learning Provider postcode

For office use only:
Evidence returned
EMA number
Recipient
EM 1
A4 Your contact details

Home phone
Mobile phone
Email

A5 Contacting you
If we need to get in touch, how should we contact you?

Post x Home phone x Mobile phone x Email x SMS / text x

A6 Residency - mark one box only

You must complete this section. In case of difficulties please see the guidance notes included in this application pack or call us on 0800 121 8989.

A I am a person who is settled in the UK, and have been ordinarily resident in the UK for at least three years prior to the start of my learning programme. Please see guidance notes page 7-10
B I am a national of any European Union (EU) country (including Gibraltar) or the spouse or civil partner or child of an EU national, and have been ordinarily resident in the European Economic Area (EEA) or Switzerland for at least three years prior to the start of my learning programme
C I am an EEA migrant worker who has the right to work in the UK, or the spouse or civil partner or child of an EEA migrant worker who has been ordinarily resident in the UK at the start of my learning programme, and have been ordinarily resident in the European Economic Area (EEA) or Switzerland throughout the three years prior to that. If you are the child of a Swiss national, or the child of a Turkish migrant worker, please see guidance notes pages 7-10
D I am recognised as a refugee by the UK Government, or the spouse or civil partner or child of a refugee, or have been granted Humanitarian Protection, or have EU Temporary Protection
E None of the above

A7 Your Bank or Building Society account details

You must enclose a bank statement, letter, or form from your bank that shows your name, sort code, account number, roll number (if applicable) and home address. If for some reason the address is different from the address on your application form, please tell us why.

Full name of account holder
Name of Bank/Building Society
Branch
Sort Code
Account Number
Roll Number (if applicable)

To receive EMA payments, you must normally have a bank account in your own name that we can make payments into. 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 young person is unable to administer their own account, special arrangements apply. Please call us on 0800 121 8989 if this applies. See guidance notes pages 10-11.

A8 Do you live with adults who are mainly responsible for you?

Yes Go to A12
No Go to A9

If you live with a partner read the guidance notes, page 11. If you live with foster parents, answer ‘No’ and go to question A9.

A9 Are you in Local Authority care, a care leaver or living with foster parents?

Yes Go to A12
No Go to A10

If you answered ‘Yes’, leave questions A10 to A11 blank and go to question A12.

A10 Are you in a Young Offenders Institution (YOI), Secure Training Centre (STC) or Secure Children’s Home (SCH)?

Yes Go to A12
No Go to A11

If you answered ‘Yes’ leave question A11 blank and go to question A12. You must enclose a letter from the Local Authority with your application, to confirm your circumstances. If you do this, Parts B and C of this form do not need to be filled in.

A11 Do you currently receive Income Support?

Yes Go to A12
No Call 0800 121 8989

If you answered ‘Yes’, you must fill in Part C. If you answered ‘No’ we may still be able to help, please call us on 0800 121 8989.

A12 Are you a parent yourself who is mainly responsible for at least one child?

Yes Call 0800 121 8989
No Go to A13

If you answered ‘Yes’, leave question A13 blank and go to question A12. You must enclose a letter from your YOI, STC or SCH confirming your circumstances. If you do this, Parts B and C of this form do not need to be filled in. See guidance notes page 12. Note: You cannot receive EMA whilst in custody but can apply before release.

A13 Equal Opportunities Monitoring (see guidance notes page 13)

Are you: Male x Female x Prefer not to say x

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

How would you describe your ethnic origin?

White
British
Irish
Any other white background

Black or Black British
African
Caribbean
Any other black background

Mixed
Asian and black Caribbean
White and black Caribbean
White and black African

Chinese or other ethnic group
Chinese
Any other

A14 How did you first hear about EMA? Mark one box only

Internet x Bus/banner advert x Press adverts x Your Learning Provider
Radio x Leaflets or posters x Connexions
Television x Friend or family x Support worker

Now go to A15 on the next page
A4 Your contact details

Home phone

Mobile phone

Email

A5 Contacting you

If we need to get in touch, how should we contact you?

Post Home phone Mobile phone Email SMS / text

A6 Residency - mark one box only

You must complete this section. In case of difficulties please see the guidance notes included in this application pack or call us on 0800 121 8989

A I am a person who is settled in the UK, and have been ordinarily resident in the UK for at least three years prior to the start of my learning programme. Please see guidance notes page 7-10

B I am a national of any European Union (EU) country (including Gibraltar) or the spouse or civil partner or child of an EU national, and have been ordinarily resident in the European Economic Area (EEA) or Switzerland for at least three years prior to the start of my learning programme

C I am an EEA migrant worker who has the right to work in the UK, or the spouse or civil partner or child of an EEA migrant worker, who has been ordinarily resident in the UK at the start of my learning programme, and have been ordinarily resident in the European Economic Area (EEA) or Switzerland throughout the three years prior to that. If you are the child of a Swiss national, or the child of a Turkish migrant worker, please see guidance notes pages 7-10

D I am recognised as a refugee by the UK Government, or the spouse or civil partner or child of a refugee, or have been granted Humanitarian Protection, or have EU Temporary Protection

E None of the above

A7 Your Bank or Building Society account details

You must enclose a bank statement, letter, or form from your bank that shows your name, sort code, account number, roll number (if applicable) and home address. If for some reason the address is different from the address on your application form, please tell us why.

Full name of account holder

Name of Bank/Building Society

Branch

Sort Code

Account Number

Roll Number (if applicable)

Your bank account number may not be the same as the cash or debit card number. You can find it on a bank statement. Roll numbers only apply to some Building Society accounts.

A8 Do you live with adults who are mainly responsible for you?

Yes Go to A12

No Go to A9

A9 Are you in Local Authority care, a care leaver or living with foster parents?

Yes Go to A12

No Go to A10

A10 Are you in a Young Offenders Institution (YOI), Secure Training Centre (STC) or Secure Children’s Home (SCH)?

Yes Go to A12

No Go to A11

A11 Do you currently receive Income Support?

Yes Go to A12 Also fill in Part C

No Call 0800 121 8989

A12 Are you a parent yourself who is mainly responsible for at least one child?

Yes Call 0800 121 8989

No Go to A13

A13 Equal Opportunities Monitoring (see guidance notes page 13)

Are you: Male Female Prefer not to say

How would you describe yourself to have a disability?

Yes No Prefer not to say

A14 How did you first hear about EMA? Mark one box only

Internet Bus/banner advert Press adverts Your Learning Provider

Radio Leaflets or posters Connexions

Television Friend or family Support worker

Now go to A15 on the next page
Application for Education Maintenance Allowance
EMA Year 31/08/09 – 29/08/10

Part A – to be filled in by the Young Person

If we posted the 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, please fill in questions A1 to A3 in full.

If you received EMA during the EMA year 2008/09 you may not need to re-apply for EMA. See guidance notes. Please call us on 0800 121 8989 for further advice.

A1 Your name
Surname/family name
First name(s)

A2 Your address
House no./flat no./name
Street or Road
District
Town/city
County
Postcode

A3 Date of birth
This must normally be between 1/9/1990 and 31/8/1993, but there are some exceptions – see page 3 of the guidance notes for details.

e2e Learners – If you are going to attend an Entry to Employment (e2e) course, take this form to your learning provider to complete this section. You will not have to complete parts B and C. Please see guidance notes page 6

UPIN
Learning Provider contact number
Name of Learning Provider
Learning Provider postcode

For office use only:
Evidence returned
EMA number
Recipient
EMA 1
The information you provide on this form will be passed to the Learning and Skills Council (LSC). The LSC 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 may be shared with other organisations for administration and statistical purposes. Other organisations with which we may share information include the Department for Children Schools and Families, the Department for Innovation Universities and Skills, Connexions, 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 LSC or its partners. The LSC is also a co-financing organisation and uses European Social Funds from the European Union to directly or indirectly part-finance learning activities, helping develop employment by promoting employability, business spirit and equal opportunities, and investing in human resources. Further information about partner organisations, and what they do, may be found at www.lsc.gov.uk

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

Declaration

If you give false or incomplete information, or if you 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 Data Protection Statement.

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:
• I/We share responsibility for the information given with any partner named on this form
• if the young person applying for EMA with this form does not keep to their EMA Agreement, or if they leave their learning programme, they will not be eligible to receive further payments and any EMA 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 young person is eligible for EMA on residency grounds as explained on pages 7-10 of the guidance notes and can provide suitable evidence as proof if required.

I/We authorise the Department for Work and Pensions to disclose information regarding any benefits and applying for EMA you are agreeing to all the statements and conditions above.

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

Please ensure you have...

• enclosed evidence of the young person’s bank account that shows: name, home address, account number, sort code and roll number
• checked the young person has completed Part A
• completed Part B and enclosed income evidence for 2008-09
• detailed the social security benefits received (if relevant) in 2008-09 on Part C

Now send this and the rest of the application form and evidence in the envelope provided to: FREEPOST RRUB-BEXE-TJLK, Learner Support Service, Darlington DL1 4WD

EMAS

Part B - Adult(s)

Before you complete this section, please make sure you read “Applying for EMA – An Introduction” and the guidance notes.

Young Person details

Surname/family name

First name(s)

Date of birth

About you

B1 Mark one of these boxes:

• I am/We are the adult(s) mainly responsible for the young person applying for EMA. See guidance notes page 15.

• I am the young person applying for EMA.

B2

About the young person

Adult 1

Surname/family name

First name

Relationship to young person:

• Father

• Mother

• Aunt

• Uncle

• Grandparent

• Step-parent

• Partner of parent

Other (please state)

National Insurance number

B3 Does the young person named in Part A live with you at the given address?

Yes

No

If at the time of applying for EMA your household income is lower than your income in 2008-09 due to disability, as defined by the Disability Discrimination Act, read the guidance notes pages 16-17 for help.
Your income - This must be for 2008-09.

The easiest way to tell us about your income is to send your latest Tax Credit Award Notice (form TC602) that correctly states your total household income for the tax year 2008-09.

A Tax Credit Award Notice is sent to you if you receive working tax credit or child tax credit.

The figure you need to give us is your total income shown on the inside pages of your notice, as shown in the picture - not the amount of tax credits you receive.

Do not send us your Review Notice (form TC603R) or a Tax Credit Award Notice that does not state your correct income for the tax year 2008-09.

If you do not have a Tax Credit Award Notice that states your income for the tax year 2008-09, you can apply using a P60, benefits information, or other evidence. For more help, call 0800 121 8989.

B4 Do you have a Tax Credit Award Notice (TC602) that correctly states your household income for the tax year 2008-09?

No [x] Yes [x]

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: £1,5000

Now go straight to the declaration at B13. Do not fill in Part C. You have completed your application. You must enclose the Tax Credit Award Notice with your application.

B5 Did you receive Income Support, Income-based Jobseeker’s Allowance, Income-related Employment and Support Allowance or Pension Credit for the whole of the tax year 2008-09?

No [x] Yes [x]

If you received benefits for only part of the tax year 2008-09 please complete Part C. You have completed your application. You must enclose the Tax Credit Award Notice with your application.

Questions B6 to B8 are about income from employment.

Before you complete this part, check the guidance notes for help on what income you need to include in each box. If one of the adults received no income at all in the year, leave the boxes for ‘Adult 2’ blank. 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.

B6 Write in the total taxable pay as an employee from all jobs before taking off tax and National Insurance contributions.

Adult 1 [£] Adult 2 [£]

Evidence required: You need to send us any P60 or P60U forms you have for 2008-09.

B7 Write in the value of any employer benefits in kind, eg company car benefits, payment of bills or taxable vouchers.

[£] [£]

B8 Write in the total taxable income from self employment.

[£] [£]

Question B9 is about other income.

B9 Work out the total for both adults of any other income, including pensions, using the table below.

<table>
<thead>
<tr>
<th>Adult 1</th>
<th>Adult 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income from savings and investments</td>
<td></td>
</tr>
<tr>
<td>Income from property</td>
<td></td>
</tr>
<tr>
<td>Trusts, settlements and estates</td>
<td></td>
</tr>
<tr>
<td>Foreign income</td>
<td></td>
</tr>
<tr>
<td>Pensions (state, occupational or personal)</td>
<td></td>
</tr>
<tr>
<td>Notional income</td>
<td></td>
</tr>
</tbody>
</table>

Now add together the totals: $$+ = =$$

Total (if this makes a minus figure, just enter £0)

You must now deduct £300

Total other income (round down to the nearest pound)

If you were employed for only part of the tax year 2008-09 include this income in questions B6 to B9.

If you received benefits for only part of the tax year 2008-09 please complete Part C.

If you received any other income during the tax year 2008-09 please complete question B12.

Questions B10 and B11 are about your allowable deductions.

B10 Write in any personal pension contributions you paid direct 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.

B11 Statutory Maternity, Paternity or Adoption Pay. Before you answer this question, please see the guidance notes page 24.

[£] [£]

B12 During the tax year 2008-09, did you 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 box below. Before you answer this question, check the guidance notes for what ‘other’ income means.

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

Now go to B13 on the next page.
Your income - This must be for 2008-09.

The easiest way to tell us about your income is to send your latest Tax Credit Award Notice (form TC602) that correctly states your total household income for the tax year 2008-09.

A Tax Credit Award Notice is sent to you if you receive working tax credit or child tax credit.

The figure you need to give us is your total income shown on the inside pages of your notice, as shown in the picture - not the amount of tax credits you receive.

Do not send us your Review Notice (form TC603R) or a Tax Credit Award Notice that does not state your correct income for the tax year 2008-09. Do not send us your Review Notice (form TC603R) or a Tax Credit Award Notice if you do not have a Tax Credit Award Notice that states your income for the tax year 2008-09, you can apply using a P60, benefits information, or other evidence. For more help, call 0800 121 8989.

B4 Do you have a Tax Credit Award Notice (TC602) that correctly states your household income for the tax year 2008-09?

No x Yes x

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: £15,000

Now go straight to the declaration at B13. Do not fill in Part C. You have completed your application. You must enclose the Tax Credit Award Notice with your application.

B5 Did you receive Income Support, Income-based Jobseeker’s Allowance, Income-related Employment and Support Allowance or Pension Credit for the whole of the tax year 2008-09?

No x Yes x

Now go straight to the declaration at B13. Fill in your details and the benefits you received in Part C. Do not send Part C to the Department for Work and Pensions (DWP). We will verify the social security benefits you received with the DWP.

Fill in the questions below only if you have not enclosed a Tax Credit Award Notice showing your income for the tax year 2008-09; and if you received any income in the tax year 2008-09.

Questions B6 to B8 are about income from employment.

Before you complete this part, check the guidance notes for help on what income you need to include in each box. If one of the adults received no income at all in the year, leave the boxes for ‘Adult 2’ blank. 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.

B6 Write in the total taxable pay as an employee from all jobs before taking off tax and National Insurance contributions.

£ £ £ £ £ £

B7 Write in the value of any employer benefits in kind, eg. company car benefits, payment of bills or taxable vouchers.

£ £ £ £ £ £

B8 Write in the total taxable income from self employment.

£ £ £ £ £ £

Questions B10 and B11 are about your allowable deductions.

If you were employed for only part of the tax year 2008-09 include this income in questions B6 to B9. If you received benefits for only part of the tax year 2008-09 please complete Part C. If you received any other income during the tax year 2008-09 please complete question B12.

B9 Work out the total for both adults of any other income, including pensions, using the table below.

Annual amount of:

<table>
<thead>
<tr>
<th>Adult 1</th>
<th>Adult 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income from savings and investments</td>
<td></td>
</tr>
<tr>
<td>Income from property</td>
<td></td>
</tr>
<tr>
<td>Trusts, settlements and estates</td>
<td></td>
</tr>
<tr>
<td>Foreign income</td>
<td></td>
</tr>
<tr>
<td>Pensions (state, occupational or personal)</td>
<td></td>
</tr>
<tr>
<td>Notional income</td>
<td></td>
</tr>
</tbody>
</table>

Now add together the totals + = £

Total (if this makes a minus figure, just enter £0)

Adult Dependant’s Grant or miscellaneous taxable income (include the full amount)

B10 Write in any personal pension contributions you paid direct 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.

B11 Statutory Maternity, Paternity or Adoption Pay. Before you answer this question, please see the guidance notes page 24

£ £ £ £

B12 During the tax year 2008-09, did you 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 box below. Before you answer this question, check the guidance notes for what ‘other’ income means.

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

£ £ £ £ £ £

Now go to B13 on the next page
The information you provide on this form will be passed to the Learning and Skills Council (LSC). The LSC 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 may be shared with other organisations for administration and statistical purposes. Other organisations with which we may share information include the Department for Children Schools and Families, the Department for Innovation Universities and Skills, Connexions, 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 LSC or its partners.

The LSC is also a co-financing organisation and uses European Social Funds from the European Union to directly or indirectly part-finance learning activities, helping develop employment by promoting employability, business spirit and equal opportunities, and investing in human resources. Further information about partner organisations, and what they do, may be found at www.lsc.gov.uk

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

**Declaration**

If you give false or incomplete information, or if you 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 Data Protection Statement.

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:

- I/We share responsibility for the information given with any partner named on this form
- if the young person applying for EMA with this form does not keep to their EMA Agreement, or if they leave their learning programme, they will not be eligible to receive further payments and any EMA 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 young person is eligible for EMA on residency grounds as explained on pages 7-10 of the guidance notes and can provide suitable evidence as proof if required.
- the guidance notes pages

If you do not supply your National Insurance number, the form will be returned to you and this may delay any payments.

Please ensure you have...

- enclosed evidence of the young person’s bank account that shows: name, home address, account number, sort code and roll number
- checked the young person has completed Part A
- completed Part B and enclosed income evidence for 2008-09
- detailed the social security benefits received (if relevant) in 2008-09 on Part C

If at the time of applying for EMA your household income is lower than your income in 2008-09 due to disability, as defined by the Disability Discrimination Act, read the guidance notes pages 16-17 for help.

Now send this and the rest of the application form and evidence in the envelope provided to:

**FREEPOST RRUB-BEXE-TJLK, Learner Support Service, Darlington DL1 4WD**
Part C - First adult or young person on income support

Who needs to fill in Part C:
• Any parent or carer who received any of the benefits below between 6 April 2008 and 5 April 2009 (Tax Year 2008-09)
• any young person who is receiving Income Support at the time of filling in the form
But:
• If you are sending us your Tax Credit Award Notice, you do not need to fill in Part C
• If one parent or carer received Income Support, Income-based Jobseeker’s Allowance, Income-related Employment and Support Allowance or Pension Credit for the whole tax year, only that person needs to fill in Part C.

What happens next?
• Send this completed Part C to the Learner Support Service, with the rest of your application
• Do not send it to your DWP office. See guidance notes page 25 for more information.

Young Person details
Surname/family name
First name(s)

Yes, I am the young person and currently in receipt of Income Support.
From (date) D   M   D   Y

Adult 1
Surname
First name
Tell us about any benefits you received between 6 April 2008 and 5 April 2009 (Tax Year 2008-09).

Income Support, Income-based Jobseeker’s Allowance, Income-related Employment and Support Allowance or Pension Credit
Carer’s Allowance
Contribution-based Employment and Support Allowance
Contribution-based Jobseeker’s Allowance (excluding any amounts of JSA[JB])
Incapacity benefit (exclude Incapacity Benefit claimed before 1995)
Bereavement Allowance

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

From (date) D   M   D   Y   To (date) D   M   D   Y
From (date) D   M   D   Y   To (date) D   M   D   Y

Please check the other side of this page and complete for Adult 2 (if necessary)
**Part C - second adult**

If either of the adults mainly responsible for the young person received Income Support, Income-based Jobseeker's Allowance, Income-related Employment and Support Allowance or Pension Credit for the **whole** of the tax year 2008-09, then that adult should fill in their details on the other side of this form. If you do this, the second adult does not need to use this page.

### Adult 2

<table>
<thead>
<tr>
<th>Benefit</th>
<th>From Date</th>
<th>To Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surname First name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carer's Allowance</td>
<td>DDMMYY</td>
<td>DDMMYY</td>
</tr>
<tr>
<td>Contribution-based Employment and Support Allowance</td>
<td>DDMMYY</td>
<td>DDMMYY</td>
</tr>
<tr>
<td>Contribution-based Jobseeker's Allowance (excluding any amounts of JSA[IB])</td>
<td>DDMMYY</td>
<td>DDMMYY</td>
</tr>
<tr>
<td>Incapacity benefit (exclude Incapacity Benefit claimed before 1995)</td>
<td>DDMMYY</td>
<td>DDMMYY</td>
</tr>
<tr>
<td>Bereavement Allowance</td>
<td>DDMMYY</td>
<td>DDMMYY</td>
</tr>
</tbody>
</table>

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

Please send this and the rest of the application form and evidence in the envelope provided to:
FREEPOST RRUB-BEXE-TJLK, Learner Support Service, Darlington DL1 4WD

Funded by:

[EMA Logo]

**EMA 10**
Who needs to fill in Part C:
• Any parent or carer who received any of the benefits below between 6 April 2008 and 5 April 2009 (Tax Year 2008-09)
• any young person who is receiving Income Support at the time of filling in the form
But:
• If you are sending us your Tax Credit Award Notice, you do not need to fill in Part C
• If one parent or carer received Income Support, Income-based Jobseeker’s Allowance, Income-related Employment and Support Allowance or Pension Credit for the whole tax year, only that person needs to fill in Part C.

What happens next?
• Send this completed Part C to the Learner Support Service, with the rest of your application
• Do not send it to your DWP office. See guidance notes page 25 for more information.

Young Person details
Surname/family name
First name(s)
Yes, I am the young person and currently in receipt of Income Support.
From (date) \\

Adult 1
Surname
First name
Tell us about any benefits you received between 6 April 2008 and 5 April 2009 (Tax Year 2008-09).

Income Support, Income-based Jobseeker’s Allowance, Income-related Employment and Support Allowance or Pension Credit

Whole Year Part Year From (date) To (date)

Carer’s Allowance

Whole Year Part Year From (date) To (date)

Contribution-based Employment and Support Allowance

Whole Year Part Year From (date) To (date)

Contribution-based Jobseeker’s Allowance (excluding any amounts of JSA[IB])

Whole Year Part Year From (date) To (date)

Incapacity benefit (exclude Incapacity Benefit claimed before 1995)

Whole Year Part Year From (date) To (date)

Bereavement Allowance

Whole Year Part Year From (date) To (date)

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

From (date) To (date)

From (date) To (date)

Please check the other side of this page and complete for Adult 2 (if necessary)
Part C - second adult

If either of the adults mainly responsible for the young person received Income Support, Income-based Jobseeker’s Allowance, Income-related Employment and Support Allowance or Pension Credit for the whole of the tax year 2008-09, then that adult should fill in their details on the other side of this form. If you do this, the second adult does not need to use this page.

<table>
<thead>
<tr>
<th>Benefit</th>
<th>From (date)</th>
<th>To (date)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carer’s Allowance</td>
<td>12/01/2010</td>
<td>12/01/2011</td>
</tr>
<tr>
<td>Contribution-based Employment and Support Allowance</td>
<td>12/01/2010</td>
<td>12/01/2011</td>
</tr>
<tr>
<td>Contribution-based Jobseeker’s Allowance (excluding any amounts of JSA[IB])</td>
<td>12/01/2010</td>
<td>12/01/2011</td>
</tr>
<tr>
<td>Bereavement Allowance</td>
<td>12/01/2010</td>
<td>12/01/2011</td>
</tr>
</tbody>
</table>

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

Please send this and the rest of the application form and evidence in the envelope provided to:
FREEPOST RRUB-BEXE-TJLK, Learner Support Service, Darlington DL1 4WD
## Part D - Adult(s)

### Income from self-employment

To be completed by the adult(s) who are mainly responsible for the young person and the adult’s accountant. **Round your answers down to the nearest pound and do not include pence.**

### Young Person details

<table>
<thead>
<tr>
<th>Surname/family name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>First name(s)</td>
<td></td>
</tr>
<tr>
<td>Date of birth</td>
<td>D M 19YY</td>
</tr>
</tbody>
</table>

### D1 About you

<table>
<thead>
<tr>
<th>Adult 1</th>
<th>Adult 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surname/family name</td>
<td></td>
</tr>
<tr>
<td>First name</td>
<td></td>
</tr>
<tr>
<td>Tax reference</td>
<td></td>
</tr>
</tbody>
</table>

### D2 Details of income for tax year (you must cross the appropriate tax year box):

**2008-09**

- Employment income and Directorships £
- Self-Employment (as a sole trader) £
- Partnerships £
- UK Land and Property £
- UK Interest (before tax) £
- UK Dividends and tax credits £
- UK Pensions and benefits £
- Other taxable income £

**Total income received** (before tax taken off) £

**2007-08**

- Employment income and Directorships £
- Self-Employment (as a sole trader) £
- Partnerships £
- UK Land and Property £
- UK Interest (before tax) £
- UK Dividends and tax credits £
- UK Pensions and benefits £
- Other taxable income £

**Total income received** (before tax taken off) £

### D3 Deductions allowable for tax purposes (the Personal Allowance is not deductible)

<table>
<thead>
<tr>
<th>Adult 1</th>
<th>Adult 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement annuity or personal pension £</td>
<td>£</td>
</tr>
<tr>
<td>Losses from previous year £</td>
<td>£</td>
</tr>
<tr>
<td>Other £ (you must specify or your form will be returned)</td>
<td>£</td>
</tr>
</tbody>
</table>

**Total allowable deductions for tax purposes** £

**Total** (D2 less D3) £
D4  Declaration by Accountant

This section is to be completed by your Accountant if he or she has provided information

I certify that the information I have provided on this form is correct to the best of my knowledge.

Name

Accountant must sign here

Date

Professional association

Company name

Company address

Stamp

D5  Adult Declaration

If you give false or incomplete information, or if you do not tell us about any part of your income that is relevant, you may be prosecuted.

I/We certify that the details of income and liability for tax given above are a true record of the figures which will be submitted to H.M. Revenue & Customs

I/We understand that the LSC reserves the right to verify these figures with H.M. Revenue & Customs at any time, and I/we authorise H.M. Revenue & Customs to disclose this information to the LSC for this purpose if requested to do so.

If H.M. Revenue & Customs change the figure declared on this form, I/we will inform the Learner Support Service and I/we understand that this may mean the assessment needs to be reviewed.

I/We understand that if this results in a lower award being due, I/we understand that any future payments may be stopped and any payments received may need to be repaid.

Important – Adult 1 and Adult 2 are not required to sign and date this form, however by submitting this form and applying for EMA you are agreeing to all the statements and conditions above.