



The Open
University

Access to Learning Fund

(for students in England and Northern Ireland)

Financial Contingency Fund

(for students in Wales)

Application for study-related costs

(for example, childcare, internet access, equipment, travel and assessment costs for diagnosis of a specific learning difficulty such as dyslexia)

Please read the information below before completing this application. It answers some of the questions you may have about the Access to Learning Fund or Financial Contingency Fund and will help you decide if you are eligible to apply.

This application form can only be used to apply for assistance from either of those funds. If you require advice on the other types of financial support please contact the Financial Support Office (contact details can be found on page 14).

What is the Access to Learning Fund/Financial Contingency Fund?

These funds are provided by the respective Governments to assist students in financial difficulty. Assistance from the Access to Learning Fund/Financial Contingency Fund cannot be used to pay for course fees.

What can I apply for?

The Access to Learning Fund/Financial Contingency Fund is intended to help students who need extra financial support because they have higher than expected costs or if they face serious financial problems during their course.

The Funds are there to help any eligible student who has a particular financial need. However, we cannot meet every application we receive and we cannot always meet all of the costs you might apply for.

Am I eligible to apply?

To qualify for a grant towards study costs you must be in receipt of financial support towards your course fees and actively participating in your studies.

If you do not qualify for financial support for your course fees, but still feel you will face financial hardship due to the study costs you incur whilst studying with The Open University, you may apply for support if your household income is below £28,065 (for 2010/11 and 2011/12) plus

allowances (£2000 for a partner, £2000 for a first child and £1000 for each additional child).

You must also be a 'home student'. This is defined as being 'settled' in the UK on the first day of your course and 'ordinarily resident' in the UK for the previous three years preceding that date.

How is my application assessed?

When deciding whether we can make a payment from either of these funds, we will look at what we consider to be reasonable expenditure on course-related costs. Any support you have already received for study-related costs will also be considered when we make an assessment. If you are facing a financial emergency, or there are special circumstances attached to your application, we will look at this on an individual basis. The guidance notes opposite each section of the application form will tell you more about this.

How do I apply?

You apply by filling in and returning this application booklet. We will accept your application if you can demonstrate that you meet the eligibility criteria. No payments will be made before your course start date.

What if I am in receipt of Social Security benefits?

If you are in receipt of Social Security benefits, you should be aware that payments from the Access to Learning Fund/Financial Contingency Fund may affect your benefit payments.

It is your responsibility to check with the DWP to determine any effect a payment from these funds will have on your benefits. Open University staff cannot advise you in this regard.

Please read the information below before filling in this application form. It answers some of the questions you may have about the Access to Learning Fund/Financial Contingency Fund and will help you decide if you are eligible to apply.

Help with your application form

- Read the guidance notes opposite each section of the application form before answering the questions.
- Please complete the form by printing clearly in **black ink** and by ticking the appropriate boxes.
- If you need more space, please use a separate sheet and attach it to the form.
- We will not be able to consider your application if you do not answer all the appropriate sections and attach copies of the evidence required.
- If there is anything on the form you are not sure about please contact the Financial Support Office. Our staff will be able to help you to fill in the form correctly.
- Although we make every effort to ensure accuracy, the information in this application booklet may change in the light of altered regulations or policy, or because of financial or other constraints.

Section 1 – Personal details

1.1 Did you receive financial support towards your course fees?

If your course fees were paid for by financial support, please tick 'yes'. If the answer to this question is 'no', you will need to supply last tax year's income details for yourself and any partner. You will also need to supply certified evidence of your identification (e.g. passport) if you've not previously provided it.

Evidence to be provided

Your and/or your partner's employment income	Photocopy of your and/or your partner's most recent P60 and/or P45(s) or Photocopy of your and/or your partner's payslips for tax month 12 or tax week 53, showing 'Total paid to date' for earnings in the previous tax year.
Your and/or your partner's self employment income	Photocopy of a letter from your and/or your partner's accountant confirming your income from self employment or a photocopy of HM Revenue & Custom's tax calculation or If you are a company director, a photocopy of your P60, P11D or independent confirmation of your earnings and director's fees from a chartered or certified accountant
Your own and/or your partner's retirement or disability pension	Photocopy of proof of amount and how often it is paid.
Your own and/or your partner's unearned investment income (e.g. interest from bank or building society account or shares)	Photocopy of statement (for the last tax year) or Photocopy of a letter from bank, building society or investment companies stating amount and frequency of investment income or interest (for the last tax year).
Your and/or your partner's benefits	Photocopy of letter from Job Centre Plus confirming which benefit(s) you received, when you received them and how much you received.
Your own and/or your partner's unearned income from property rental or lodgers	Photocopy of tax calculation showing total property rental income or Photocopy of a signed letter from lodger confirming amount of rent paid.
Your own and/or your partner's maintenance payments	Photocopy of court order or Photocopy of solicitor's letter or Child Support notification.
Other income	Photocopy of proof of income and amount received (to include student loans, bursaries etc.).

Within this table 'partner' refers to your husband, wife, partner or civil partner. If you need advice please contact the Financial Support Office (contact details can be found on page 14).

Section 1 – Personal details

Open University Personal Identifier (you will find this on the top right of any letters you have received from The Open University)

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Title	Surname or family name	Forename(s)

- I am applying for help with:**
- Study-related costs
- Paying for a diagnostic assessment for specific learning difficulties
- Both

Please tick where appropriate

- 1.1** Did you receive statutory financial support for your course fees? (**not** sponsorship or OUSBA)
- Yes Go to section 1.2
- No See question below

If you answer no, please give details of household income.

Household Income

Please give details of your gross (before deductions of tax and National Insurance) household income during the last financial year. All the boxes in this section must be filled in. If you have no income in a particular category or categories, please write 'NIL' in the box.

Type of income	Amount received	
	You (Gross)	Your husband, wife, civil partner or partner (Gross)
Wages or salary from paid employment	£ <input style="width: 60px;" type="text"/>	£ <input style="width: 60px;" type="text"/>
Profits and drawings from a business	£ <input style="width: 60px;" type="text"/>	£ <input style="width: 60px;" type="text"/>
Interest from bank or building society accounts	£ <input style="width: 60px;" type="text"/>	£ <input style="width: 60px;" type="text"/>
Income from any investments (for example shares)	£ <input style="width: 60px;" type="text"/>	£ <input style="width: 60px;" type="text"/>
Income from other benefits (please see guidance notes)	£ <input style="width: 60px;" type="text"/>	£ <input style="width: 60px;" type="text"/>
Other income (please see guidance notes)	£ <input style="width: 60px;" type="text"/>	£ <input style="width: 60px;" type="text"/>
Total	£ <input style="width: 60px;" type="text"/>	£ <input style="width: 60px;" type="text"/>

Please provide evidence of all the income shown above.

Please use the box below to give any other details about income that you feel are relevant to your application. Please continue on an additional sheet of paper if necessary.

1.2 Residency

To qualify for a study-cost grant you must be a 'home student'. This is defined as being 'settled' in the UK on the first day of your course and 'ordinarily resident' in the UK for the previous three years preceding that date. **If you have not previously done so, please provide certified evidence of UK residency.**

1.3 Adults in your household

Your household consists of you and, if you have one, your husband, wife or partner who lives with you. The government asks us to give priority to certain groups of students when deciding how to allocate the funding, so it's important to give details about dependants.

1.4 Children

For all children listed, please provide **evidence** showing each child's date of birth by supplying photocopies of either your Child Benefits Book or a letter from the Department of Works and Pensions showing Child Benefits or Child Tax Credits received.

Please write details in the boxes opposite and continue on an additional sheet of paper if necessary.

1.2 Were you 'settled' or 'ordinarily resident' in the UK on the first day of your course?

Yes → **Go straight to 1.3**

No You do not qualify for a study-related grant

1.3 Are there any other adults in your household?

Yes

No → **Go straight to 1.4**

If 'yes', please give details below.

Name Age Sex (M/F) Relationship to you

Name	Age	Sex (M/F)	Relationship to you

1.4 Do you, your spouse or partner have any children for whom you are totally or mainly financially responsible?

Yes → **Please give details below**

No

Child's full name

Age

Normally living with you?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
<input type="checkbox"/> Yes	<input type="checkbox"/> No
<input type="checkbox"/> Yes	<input type="checkbox"/> No
<input type="checkbox"/> Yes	<input type="checkbox"/> No
<input type="checkbox"/> Yes	<input type="checkbox"/> No
<input type="checkbox"/> Yes	<input type="checkbox"/> No

Section 2 – Course details

2.1 Course you are currently studying

Please provide the course code, presentation, course title and the number of credits of the course(s) you are currently studying. If you are not sure of any of the details, please complete as much of this section as possible.

To be eligible for support from the Access to Learning Fund/Financial Contingency Fund, Open University students need to be studying the equivalent of at least 50 per cent of a full-time course. This means you must be studying at least 60 credits in the academic year, 1 September to 31 August. If you are studying at least 30 credits, you may still be eligible if:

- you have a disability or a specific learning difficulty that prevents you from studying 60 credits, or
- you are still intending to complete your qualification in no longer than twice the time taken for a full-time course.

2.2 Course participation

As funds are limited, only students who are **actively participating** on courses will be eligible for assistance. We define 'participation' as submission of assignments, attendance at residential schools and interaction with tutor groups, whether at tutorials or through online forums.

Applications cannot be considered before your course start date. You should not embark on a course of study if you are dependent upon receiving assistance from the Access to Learning Fund/Financial Contingency Fund as your application may not be successful and funds are limited.

Section 3 – Disabled Students' Allowance (DSA)

As an OU student you may be eligible for a DSA. These grants are available to disabled students in higher education to help with the extra costs needed for study. Further information can be obtained from the DSA office (phone **01908 654136**, email **DSA-Queries@open.ac.uk**).

3.1 Have you applied for a DSA?

If you answer 'yes' to question 3.1 please also answer question 3.2. If you answer 'no' to question 3.1 and believe you have additional needs, please contact the DSA office or your regional or national centre.

3.2 Costs of additional requirements

If you need financial assistance towards any special costs recommended by your needs analysis but not covered by DSA, please give details here. Appropriate evidence needs to be supplied for all support you ask for.

Students with additional requirements (especially those with dyslexia) may wish to apply for a preliminary diagnostic test before applying for a Disabled Students' Allowance. The Open University can help to meet this cost. If you would like to apply for this type of support, you should fill in Section 5 of this application booklet.

Section 4 – Study-related expenditure

The Access to Learning Fund/Financial Contingency Fund is for students who can demonstrate that their study costs exceed any course grant already received. Complete this section in full so that we can assess your application. This assessment will take into account your circumstances **over the duration of your course**. Awards for study costs may be paid in instalments.

4.1 Expenditure

You must provide details and evidence of any study costs. Levels of reimbursement are set out below for specific study costs. Resource is limited, so we need to make sure that the money available can help as many students as possible and supports the University's policy of widening participation. If you have received a course grant for study costs, the amount you received will be deducted from any reimbursement for study costs from the Access to Learning Fund/Financial Contingency Fund.

Please supply **photocopies** of evidence only (not originals).

Study costs

Evidence to be provided

Travel – Reimbursement for travel expenses will be limited to public transport or private car travel costs only. Only reasonable travel costs will be considered. Only fuel costs will be covered when travelling by car at a rate of 37.5p per mile.

Copies of any receipts for transport used and details of any journeys undertaken for example, venues, dates and mode of transport. Please also include a copy of your tutorial timetable and confirmation from your tutor that you have attended your tutorial.

Childcare – Support towards study-related childcare will be considered. The childcare must be from an OFSTED registered/approved childcare provider. There is a cap of £1000 per child (£25.64 per week) towards care costs (per 60 credits of study). We cannot support the cost of childcare during any of your hours of employment. Please supply your working hours.

Details of childcare used, including a breakdown of study-related childcare costs (dates and times of attendance), plus an invoice/receipt showing the cost of childcare and that it is provided by a registered/ approved provider.

Internet access – This will be considered for itemised internet access costs at the maximum rate of £30 per month for the duration of your course(s).

Details of Internet Service provider used and their charges plus copies of the contract and any invoices.

Set books – Support will be considered for the purchase of all set books that you are required to buy, as listed in the course description.

Copies of any receipts showing purchase of set books.

Personal Computer package – Support towards the purchase cost of a **new (not second hand)** personal computer and peripherals will be considered. (The course grant you will receive will be taken into account as a contribution towards the cost of the computer package you purchase.) Students who have already participated in any previous PC assisted-purchase scheme will not have further PC purchase considered. Application for costs towards computer purchase are limited to one per household.

Receipt showing cost of purchase, your name and address, date of purchase, details of the item purchased, vendor details and the payment method.

Other study equipment – Support for the purchase of study equipment that you are required to buy, as listed in the course description. Only reasonable costs will be considered. If expenditure is deemed to be unreasonable, only costs of a reasonable alternative will be reimbursed.

Copies of any receipts showing purchase of study equipment.

Study materials – The cost of stationery, postage, ink cartridges etc. – limited to £50 total expenditure.

Details of expenditure.

Section 4 – Study-related expenditure

4.1 Please give details of study costs you require support for.

Type of support	Amount £	Evidence supplied
Travel		
Childcare		
Internet access		
Set books		
Personal Computer		
Other study equipment		
Study materials		
Other		

Please provide evidence of all the items shown above.

4.2 Method of payment

You will receive your payment by direct credit into a bank, Post Office savings or building society account held in your own name (a joint account is acceptable).

If you have a building society account, you should find out from the society whether you also need to give the roll number. If so, write it in the appropriate box.

The account you nominate must be in the UK and able to accept payments by direct credit. Check with your bank or building society if you're not sure.

If the account details differ from those we have on record, we will pay you by cheque.

4.3 Grants to third parties

Support provided in relation to sections 3.2 and 4.1 can take the form of a monetary grant to you or a third party. Where appropriate, we would make the award in the form of a cheque(s) payable to the relevant third party(ies) concerned. To allow us to do this for you, we need your agreement. You also need to supply the name of the third party as it should appear on a cheque made payable to them.

Any grants made in this way will be sent to you for you to forward as appropriate.

4.4 Supporting statement

Please use the box opposite to explain any further details about your circumstances that you feel will support your application.

Please continue on an additional sheet of paper if necessary.

4.2 Method of payment

Please enter details below of the account you want your money paid into.

Account number

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Sort code

		-			-		
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If this is a building society account, please enter the roll number below.

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4.3 Grants to third parties

I agree that support offered to me may be given to me in the form of a grant to a third party.

Name of organisation(s) grants should be made to

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4.4 Supporting statement

Please state why you are in financial difficulty and why you believe your situation to be exceptional and to merit additional support (please attach additional sheets if necessary).

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Section 5 – Diagnostic assessment for a specific learning difficulty

If you are not applying for reimbursement of the cost of a specific learning difficulties diagnostic assessment, please go straight to Section 6 of this booklet.

The cost of a specific learning difficulty diagnostic assessment is normally paid or reimbursed **after** the assessment has been completed. However, payment can be made in advance (in the form of a cheque payable to the assessor) if you forward a copy of a letter confirming the date and time of your appointment and the cost. **Please note that no support will be awarded until after your course has started.**

Your invoice should include your name and personal identifier (PI), your assessor's name and details, the date and cost of the assessment. Your application will not be processed without an invoice or, if already paid, a receipt.

Reimbursement of costs will be limited to the fee for the diagnostic assessment and return travel expenses only. To apply for travel expenses, please use Section 4.1 of this application form.

Please note that any course grant you receive will not be taken into account when calculating reimbursement for any costs related to a diagnostic assessment.

Section 5 – Diagnostic assessment for a specific learning difficulty

Claim for reimbursement of the cost of a diagnostic assessment (for example, Dyslexia)

Please read the notes opposite before you submit your claim form.

If you are not applying for support with the cost of a diagnostic assessment, please go straight to Section 6.

- 5.1** You must provide an invoice (from the assessor) for your diagnostic assessment showing the assessment date and cost. These details will be used to issue payment for your diagnostic assessment.

Name of Assessor	
Qualification status	
Qualifications and awarding institution(s)	
Practising Certificate Number	
Issuing Body	

(These details will be available from your assessor.)

Address where assessment was carried out:

Date of assessment

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Type of assessment undertaken

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Cost of assessment:

£

- If you have paid for the diagnostic assessment yourself and require reimbursement, please tick here. You will need to provide a receipt from the assessor confirming that the diagnostic assessment has been paid for.

Section 6 – Declaration

6.1 Declaration

Please make sure you understand the declarations in Section 6.1 opposite. Then put your signature and the date in the boxes in Section 6.1. **We will not be able to deal with your application if it hasn't been properly signed and dated, and it will be returned to you.**

Please return your completed application booklet, together with all the supporting evidence required to:

**Financial Support Office
The Open University
PO Box 6055
Milton Keynes
MK10 1NH**

Phone: 01908 653411 (Monday to Thursday 8:30 to 17:30, Friday 8:30 to 17:00)

Fax: 01908 654914

Email: financial-support@open.ac.uk

Website: www.open.ac.uk/financialsupport

Checklist

Please read through this list and tick the boxes to check that you have completed the form correctly and provided the appropriate evidence. Returning your application for extra information will delay your application.

- Have you written your Open University personal identifier on page 3 of the form?
- Have you carefully read the guidance notes for each section and provided the correct evidence to support your application? **Please check this thoroughly – it's the main reason for us having to return applications.**

Remember to send photocopies only, not original documents.

Section 6 – Declaration

6.1 Declaration

Please read the declarations below carefully. You (and your husband, wife or partner if applicable) must sign and date the declaration so that we can process your application. The information I have given on this form is complete and accurate to the best of my knowledge and belief.

I understand that if I give The Open University false information, this will automatically disqualify my application and also may lead to disciplinary procedures resulting in possible expulsion from the University. I further undertake to repay any grants obtained by me as a result.

I understand that The Open University may ask for further evidence in support of claims made in this application.

If applicable, I agree to provide The Open University with a copy of my specific learning difficulty assessment report or to allow the University to obtain a copy from the assessor. I also agree that The Open University can use information recorded in the assessment report to update my disability profile.

Your Signature

Name (*please print*)

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Husband's, wife's or partner's signature

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Data Protection Act 1998

The Open University is a data controller in terms of the 1998 legislation. The Student Services Department follows University policy in matters of data protection. The data requested on this form is covered by the notification provided by the University under the Data Protection Act. Personal data will be used solely in the department for statistical purposes and electronic records keeping.

The Higher Education Funding Council for England (HEFCE) for students in England, or the Higher Education Funding Council for Wales (HEFCW) for students in Wales, and the Higher Education Statistics Agency (HESA) may use the information provided on this form. This information, together with other information supplied by institutions, will be analysed. The HEFCE/HEFCW and HESA will not identify individuals in any published results.

The data will not be passed to any other third party without your consent, except when the University is required to do so by law. Any formal enquiries concerning the use of data noted here should be addressed to the Data Protection Coordinator.

Financial Support Office

The Open University
PO Box 6055
Milton Keynes
MK10 1NH

Phone: 01908 653411 (Monday to Thursday 8:30 to 17:30, Friday 8:30 to 17:00)

Fax: 01908 654914

Email: financial-support@open.ac.uk

Website: www.open.ac.uk/financialsupport



The Open University Student Services

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