

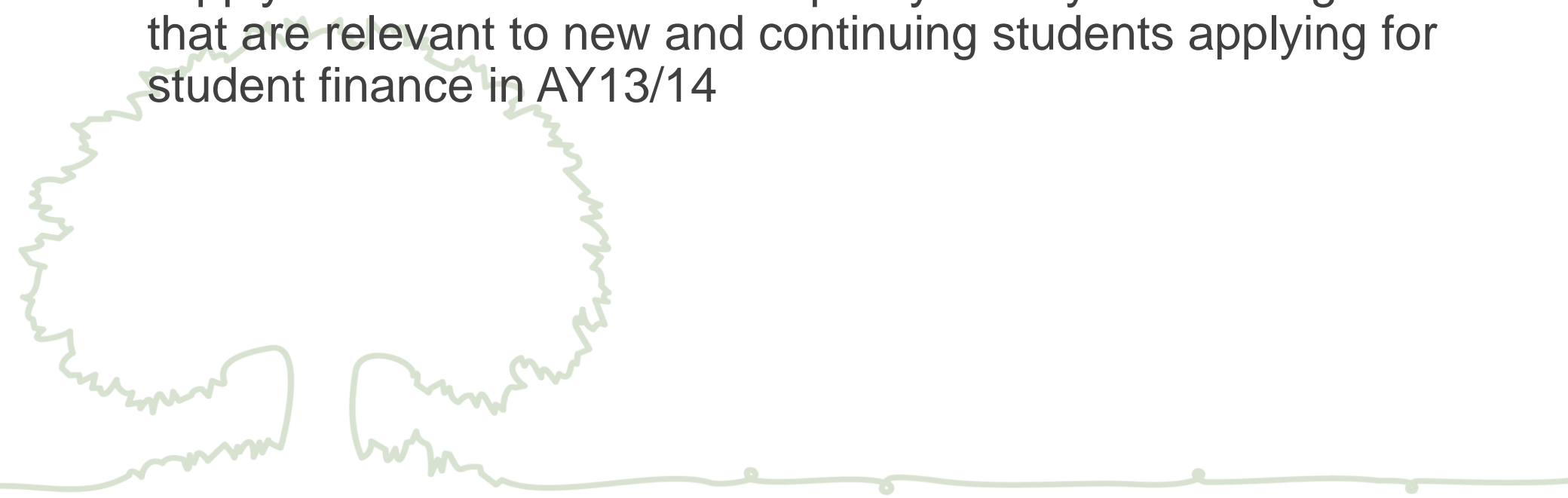
AY13/14 Apply and Assess

The Learning Team

January 2013

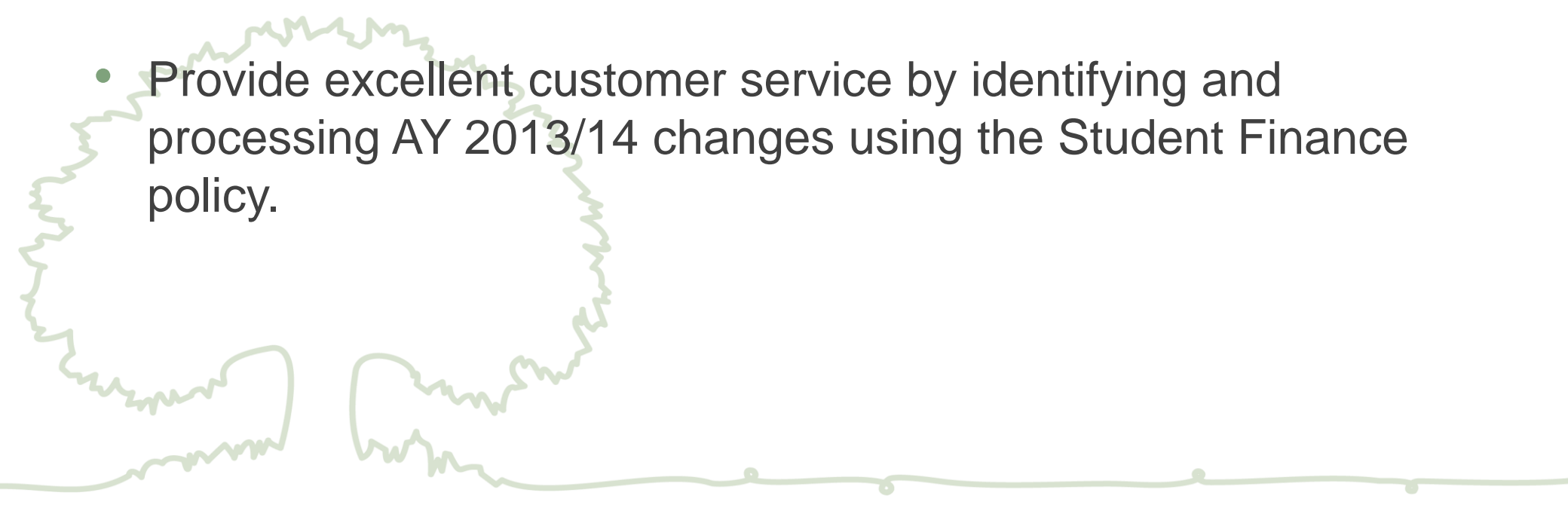
Introduction

- This session is an opportunity to review and discuss changes that will impact upon new and continuing students for the AY13/14
- “Apply and Assess” will look at policy and system changes that are relevant to new and continuing students applying for student finance in AY13/14



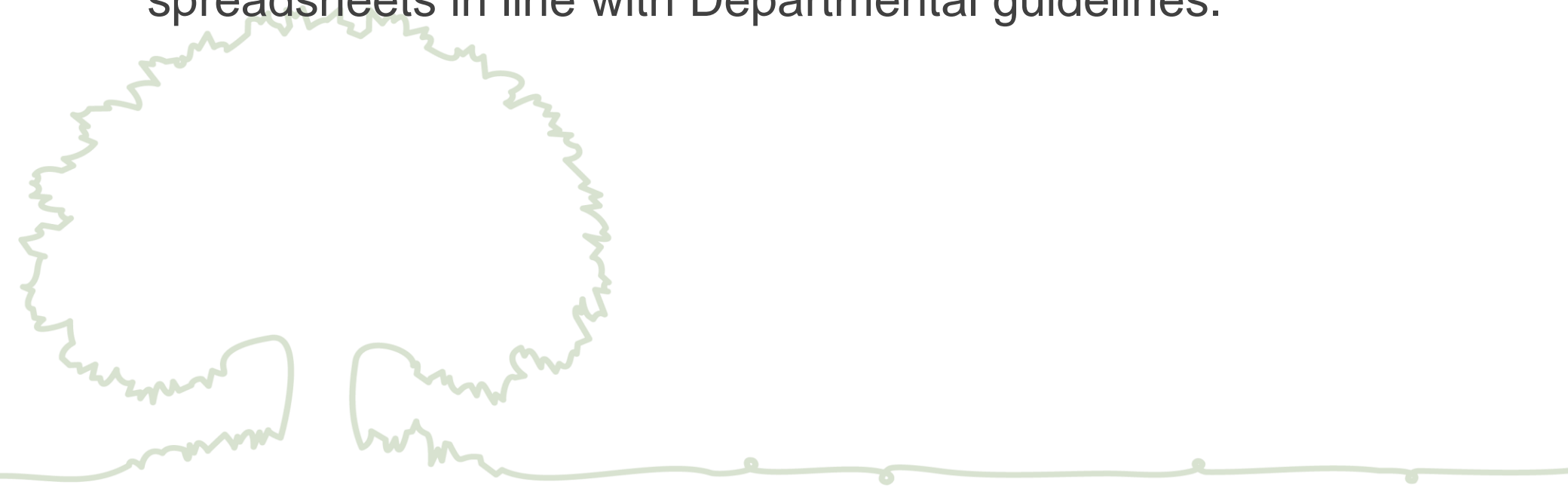
Learning Objectives

By the end of this session, you will be able to:


- Apply AY 2013/14 student finance policy to determine entitlement to student support for new and continuing students using guidance material.
 - Provide excellent customer service by identifying and processing AY 2013/14 changes using the Student Finance policy.
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Learning Objectives

- Apply correctly assessing rules to applications based upon different start dates in line with Student Finance policy.
- Record accurately information on manual calculation spreadsheets in line with Departmental guidelines.



Grants for Dependants

- For AY 2013/14, the way that Grants for Dependants (GFD) are financially assessed is changing
 - GFDs moving to Prior Financial Year assessment
 - Income submitted by partners, adult dependants and children and VHI checks
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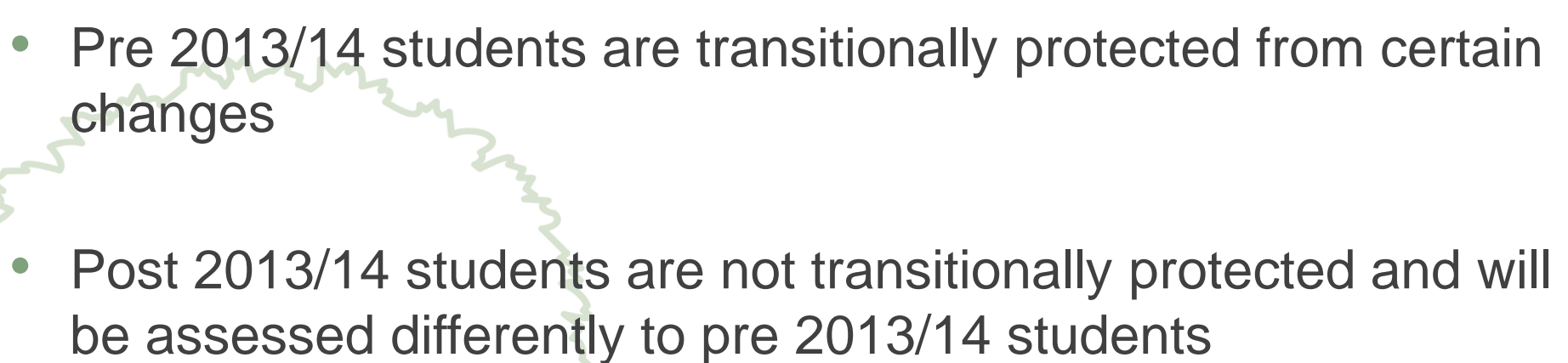
Outline of Changes

- Grants For Dependents are moving to Prior Financial Year assessment
- Income submitted by partner, spouse or civil partner will be subject to VHI checks
- Financial commitments and disregards for continuing students in AY13/14 remain the same
- Financial commitments removed and increased disregards for new students in AY13/14
- Income for Children and 'other' adult dependents will not be subject to VHI checks

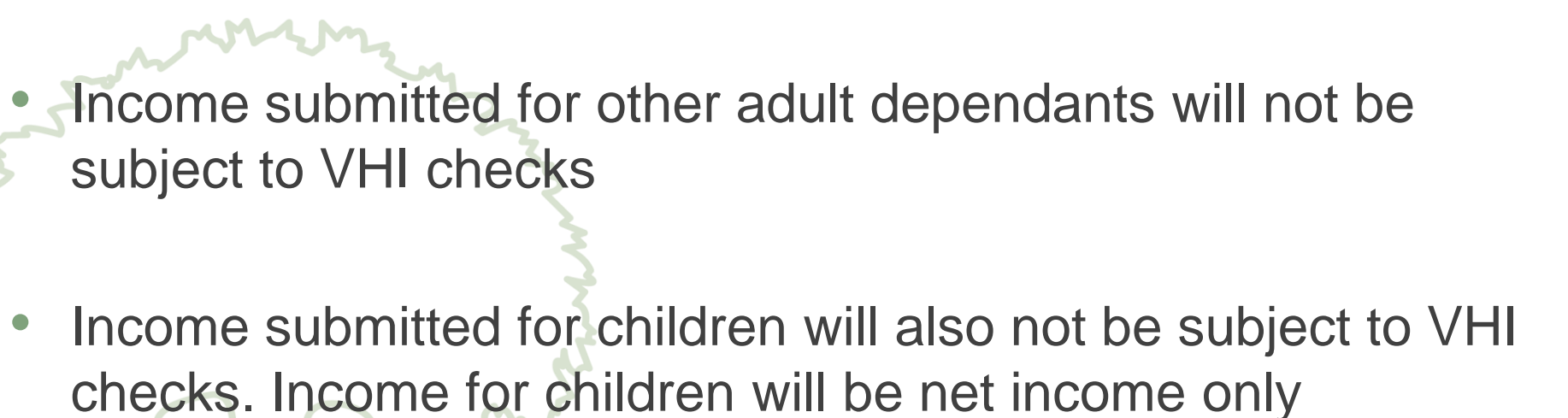
Rationale behind the changes

- Remove estimation from income assessments which will reduce the need for end of year finalisation
- Reduce overpayments – Estimated in 10/11 at £13.5 million with only half ever reclaimed
- Provide more certainty for customers
- Simplify the income assessment process for assessors as new students will no longer provide commitments and as such no need to determine if acceptable or not.
- Reduce the number of students who don't apply for dependant's grants due to the complexity of the process
- Improve customer service

Pre and Post 13/14 Students

- Due to the changes in policy students who started studying prior to 2013/14 will be assessed differently to students who start studying from 2013/14
 - Pre 2013/14 students are transitionally protected from certain changes
 - Post 2013/14 students are not transitionally protected and will be assessed differently to pre 2013/14 students
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Income used in assessments

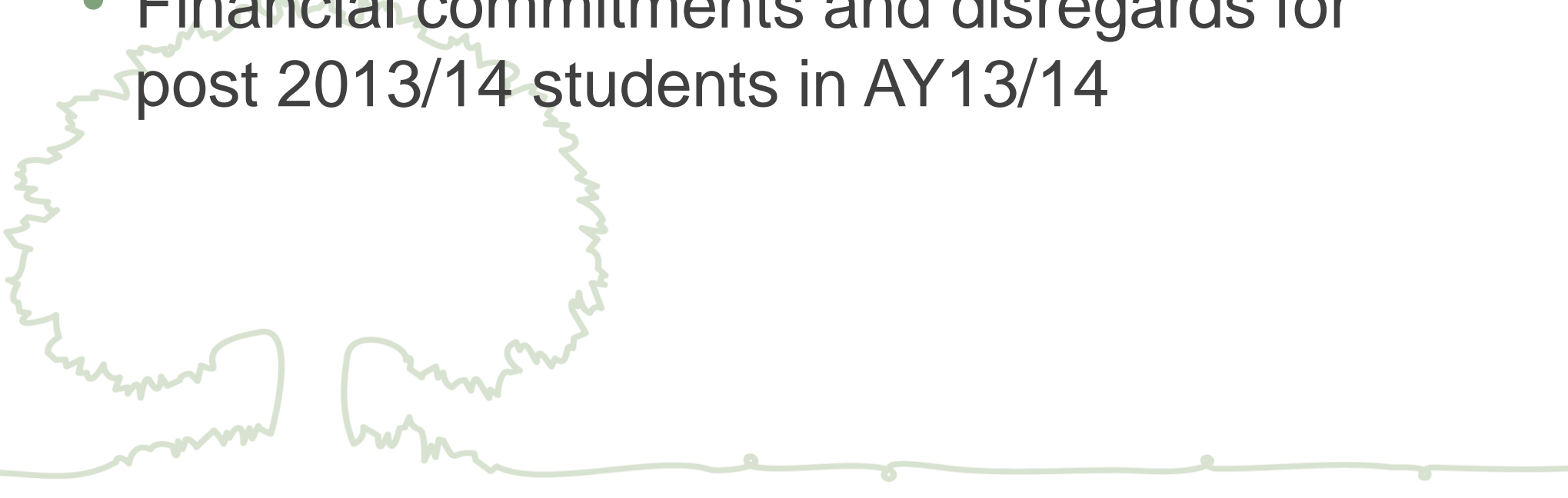
- GFDs moving to Prior Financial Year assessment
 - Income submitted by partners, spouses and civil partners are subject to VHI checks
 - Income submitted for other adult dependants will not be subject to VHI checks
 - Income submitted for children will also not be subject to VHI checks. Income for children will be net income only
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VHI


- All students who apply for GFDs and are married or over 25 living with a partner will be subject to a VHI check for their spouse or partner.



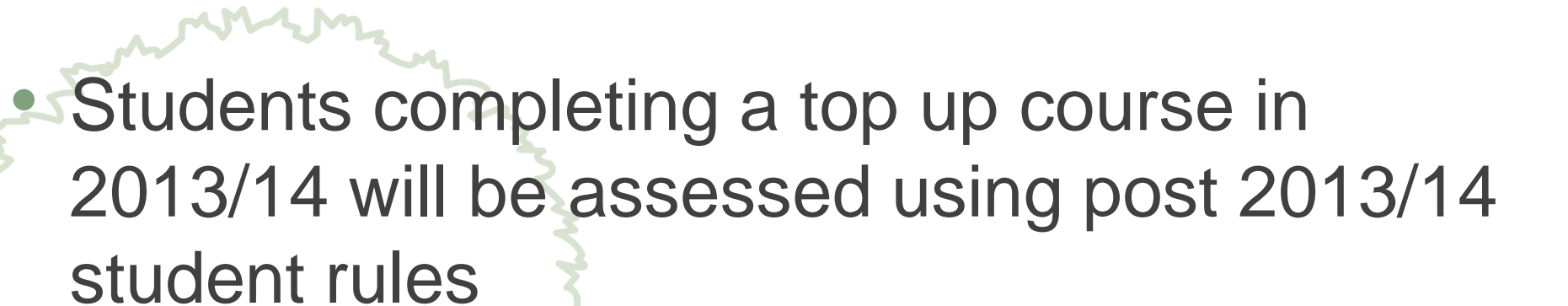
Financial Commitments

- Financial commitments and disregards for pre 2013/14 students in AY13/14
 - Financial commitments and disregards for post 2013/14 students in AY13/14
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Disregards

- Pre 2013/14 students will be subject to the same disregards they were entitled to in 2012/13
 - Post 2013/14 students will be subject to new, increased disregards
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End-on/Top Up course

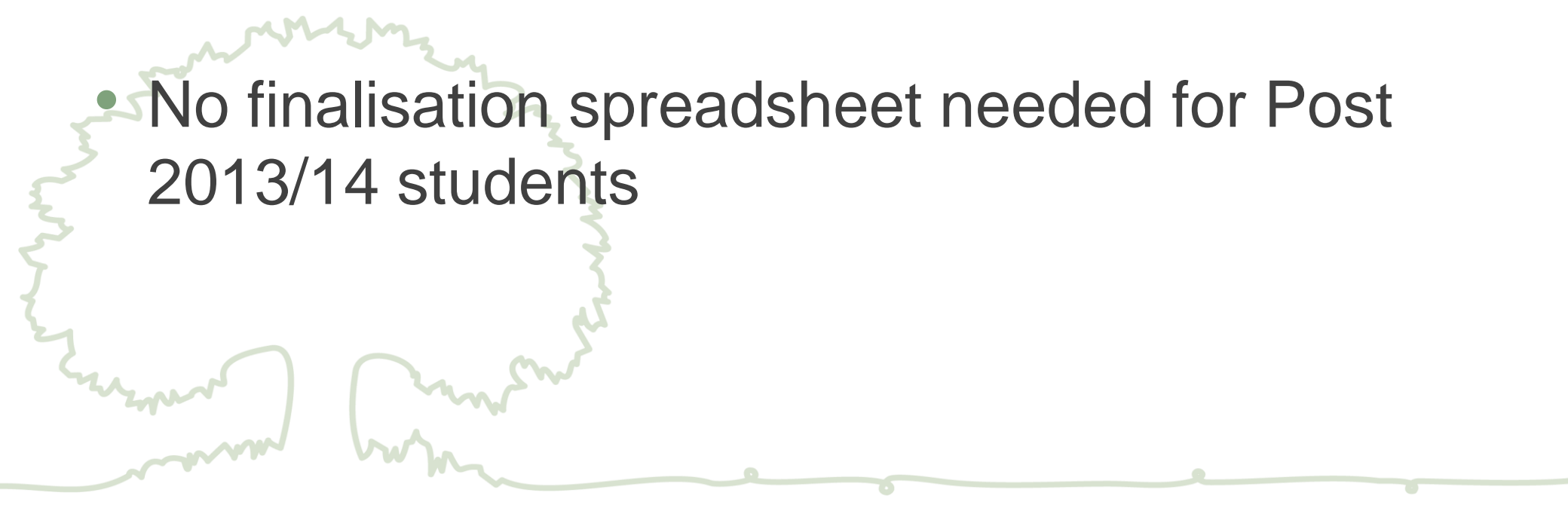
- Students who are studying a end-on course in 2013/14 are transitionally protected and will be subject to pre 2013/14 student rules
 - Students completing a top up course in 2013/14 will be assessed using post 2013/14 student rules
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Scenario Break


- Scenarios A, B and C



Grants for Dependants spreadsheets

- From AY 2013/14 there will be two sets of spreadsheets to use. One is for Pre 2013/14 students and one is for Post 2013/14 students
 - No finalisation spreadsheet needed for Post 2013/14 students
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Other Adult Dependants

- Students who have another adult dependant are entitled to claim ADG in relation to the dependant
 - The threshold for other adult dependants is £3796.00
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Scenario Break

- Scenarios D, E and F



Finalisation

- Students assessed under post 2013/14 rules will not be subject to finalisation
- Students assessed under pre 2013/14 rules will have their financial commitments finalised