



Financial Evidence

Please read through this guide to find out which financial evidence you will need to upload when you apply for the 16-19 Further Education Bursary. The address on the financial evidence must match your home address on your student records.

Evidence required;

- Pay slips for the last 3 months
- A recent P60
- Universal Credit – The most recent full statement
- Tax Credit Award Notification – This needs to be for the current year, all pages
- Benefit letter – dated within the last 3 months
- Self- Employment – latest Tax Return sent to HMRC or a Statement of Accounts

Wage slips

Please upload the most recent wage slips. We will require 3 months. The address must be clearly visible on the wage slip.

Employee No.	Employee Name	Process Date	National Insurance Number
007	Mr James Bond	31-Jan-12	PX 12 34 56 D
Payments	Units	Rate	Amount
Basic Pay			5,000.00
Total Payments			5,000.00
Deductions			Amount
Income Tax			1,167.46
National Insurance			381.76
Total Deductions			1,549.22
Mr James Bond 123 Bond Street London W1T 1SL		This Period	Year To Date
		Total Payments	5,000.00
		Total Deductions	1,549.22
		Taxable Gross Pay	50,000.00
		Income Tax	11,673.46
		Employee NIC	3,817.60
		Employer NIC	6,087.10
ABC Ltd Tax Code: 747L NI table: A Dept: Default Tax Period: Jan-12 Payment Method: BACS		Net Pay	3,450.78

P60

If you have your P60 for the current year you can upload this instead of your wage slips

P60 End of Year Certificate

Tax year to 5 April **2022**

This is a printed copy of an eP60

To the employee:

Please keep this certificate in a safe place as you will need it if you have to fill in a tax return. You also need it to make a claim for tax credits and Universal Credit or to renew your claim.

It also helps you check that your employer is using the correct National Insurance number and deducting the right rate of National Insurance contributions.

By law you are required to tell HM Revenue and Customs about any income that is not fully taxed, even if you are not sent a tax return.

HM Revenue and Customs

The figures marked ★ should be used for your tax return, if you get one

Employee's details

Surname **Sunshine**

Forenames or initials **Lovely**

National Insurance number **CT123456C**

Works/payroll number **HE9810**

Pay and Income Tax details

	Pay	Tax deducted
	£ p	£ p
In previous employment(s)	0 00	0 00
In this employment	★ 891 00	0 00
Total for year	891 00	0 00

Final tax code **1257L**

National Insurance contributions in this employment

NIC table letter	Earnings at the Lower Earnings Limit (LEL) (where earnings are equal to or exceed the LEL)	Earnings above the LEL, up to and including the Primary Threshold (PT)	Earnings above the PT, up to and including the Upper Earnings Limit (UEL)	Employee's contributions due on all earnings above the PT
	£	£	£	£ p
A	480	256	155	18 60

Statutory payments included in the pay 'In this employment' figure above

	£ p		£ p		£ p
Statutory Maternity Pay	0 00	Statutory Paternity Pay	0 00	Statutory Shared Parental Pay	0 00
Statutory Adoption Pay	0 00	Statutory Parental Bereavement Pay	0 00		

Other details

Student Loan deductions in this employment (whole £s only)

£ 0

Postgraduate Loan deductions in this employment (whole £s only)

£ 0

To employee

Mrs Lovely Sunshine
Any Street
Any City
AC20 5TH

Your employer's full name and address (including postcode)

Company GHI
Any Street
Any City
AC20 5TH

Employer PAYE reference

123/AA12345

Certificate by Employer/Paying Office:

This form shows your total pay for Income Tax purposes in this employment for the year.

Any overtime, bonus, commission etc, Statutory Sick Pay, Statutory Maternity Pay, Statutory Paternity Pay, Statutory Shared Parental Pay, Statutory Parental Bereavement Pay or Statutory Adoption Pay is included.

P60(Substitute) (SPR) (2021-2022)

Do not destroy

Universal Credit

Please upload the full Universal Credit breakdown, which is normally 4-5 screenshots. The information must include your name, address, payments date, income and any deductions.



GOV.UK Universal Credit

Home To-do list Journal **Print this statement**

Statement

Your payment this month is
£1,422
This will be paid by 8pm on 02 July 2017

How we calculate your payment

Your payment is based on what you've told us and covers the period between

26 MAY and 25 JUN

It is important to tell Universal Credit immediately about any changes in your circumstances that could affect your Universal Credit payments.
[Report a change in my circumstances](#)

Standard allowance You receive a standard Universal Credit allowance each month	£251.77
Housing You said that your rent is £700.00 per month	£700.00
Children You get support for 2 children	£508.75
Total before adjustments	£1,460.52
Debts and loan repayments	
Tax Credits recovery Call 0345 850 0293 to find out more about your debt and loan repayments.	£37.76
The total we take off for debts and loan repayments is	£37.76
Total payment for this month	£1,422.76

Example of acceptable Universal Credit statement.

The document must show:

- Claimants name
- Payment period
- All allowances for the claimant's circumstances
- All deductions of the claimant's circumstances
- Total payment for the month

To download your UC statement, login to your Universal credit account and go to the statement summary page. Then click into the most recent monthly statement, which will show on the screen. You can the **'Print to PDF'/'Save as PDF'** you will have to save the document to your device.

Please do not send screenshots of the journal or to do list as these will not be accepted and will cause a delay in processing your bursary application.



Statements


Your statement explains your payment and how we worked it out.

Select a statement from the list to view.

View statement by pay date	Amount
12 June 2024	£789.19
12 May 2024	£348.29
12 April 2024	£0.00
12 March 2024	£345.91

Tax Credit Award

Please provide ALL pages for the **CURRENT** year. This usually is 4-6 pages.


HM Revenue
& Customs

Online www.gov.uk/managetaxcredits
Helpline 0345 300 3930
Textphone 0345 300 3909
For our opening hours go to www.gov.uk/contact-hmrc

TCO PRESTON 8
Tax Credit Office
HM Revenue and Customs
BX9 1ER

Renew online today at www.gov.uk/managetaxcredits
once logged in you can access a range of services in your Personal Tax Account.
If you can't renew online, phone us quoting this renewal reference number
000 001 151 502 032

Check now,
no later than 31/07/2020

Please keep this for your records

Date 26/04/2020

Tax credits - Annual Review for year ended 05/04/2020
Your tax credits award for 06/04/2019 to 05/04/2020

SAMPLE

We told you that we would be contacting you to review your tax credits award. We want to:

- make sure we paid you the correct amount for the award period shown above, and
- ask you to make a tax credits claim for 2020-2021.

We need you to review your personal circumstances during the whole award period shown above and check your income.

If you need to tell us about anything once you have completed your Annual Review, please contact us. If you do not have anything to tell us you need do nothing more and you will not receive another notice from us for this year. This TC603R Tax Credits Annual Review is also your Award Notice and the amount of your award is shown below.

We will decide on 31/07/2020 that:

- The final amount of your tax credits award for the period 06/04/2019 to 05/04/2020 is £2729.70.
- Your tax credits award for 2020-2021 will be as shown in the **Payments** section.

If later, you think those decisions are wrong, you will have 30 days from 31/07/2020 to ask us to look at the decision again. We call this mandatory reconsideration. If you do think something is wrong, you do not have to wait until then to contact us.

Tax credits will gradually be replaced by Universal Credit. You cannot receive tax credits and Universal Credit at the same time. For more information, go to www.gov.uk/universalcredit

Benefits

If anyone in your household is receiving benefits please provide all pages of the letter. The letter needs to be dated within the last 3 months. If the letter is older, you will need to upload a recent bank statement showing the relevant benefits being paid into the bank account

Household Income evidence example

Mr. Smith

SAMPLE

Dear Mr. Smith,

Thank you for your request for information.

The details are as follows: -

You were awarded Jobseekers Award Income Based

Claim start date: 02/11/2018

Claim termination date: N/A – Ongoing claim
At weekly rate of £73.10

Second claim start date –
Second claim termination date –
At a weekly rate of –

Paid up to 05/03/2019 – Ongoing

Any other information: None

For any further enquiries please contact us on the above number.

John

jobcentreplus

Department for
Work and Pensions

Watford Centre Benefit Post
Handling Site B
Wolverhampton WV99 1RH

www.gov.uk

Telephone: 0345/0845 608
6545
Text phone: 0845 608 8551
Date: 10/03/2019

If you get in touch with us, tell
us this reference number

You will need to upload the latest HMRC Tax Return or a Statement of Accounts from an accountant. Statement of Accounts need to be on headed paper, or a company stamp with the name and address of the company. Please upload the entire document showing the income for the year. We will be looking for the gross profit figure.

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