

Financial Evidence



Xaverian
College

Please read through this guide to find out what 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 record.

Evidence required:

- Pay slips for the last three months
- Self- Employment – latest Tax Return sent to HMRC or a Statement of Accounts
- A recent P60
- Universal Credit – The most recent full statement
- Tax Credit Award Notification – This needs to be for the current year and include all pages
- Pension



**Xaverian
College**

Wage slips

Please upload the most recent wage slips. We will require payslips from the last three 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	Deductions		Amount
Basic Pay				5,000.00	Income Tax		1,167.46
Total Payments				5,000.00	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	Taxable Gross Pay	50,000.00
				Total Deductions	1,549.22	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	



**Xaverian
College**

Self-Employment

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

**HM Revenue
& Customs**

Self-employment (full)
Tax year 6 April 2022 to 5 April 2023 (2022–23)

Please read the 'Self-employment (full) notes' to check if you should use this page or the 'Self-employment (short)' page.
For help filling in this form, go to www.gov.uk/taxreturnforms and read the notes and helpsheets.

Your name

Your Unique Taxpayer Reference (UTR)

Business details

1 Business name – unless it's in your own name

2 Description of business

3 First line of your business address – unless you work from home

4 Postcode of your business address

5 If the details in boxes 1, 2, 3 or 4 have changed in the last 12 months, put 'X' in the box and give details in the 'Any other information' box
☐

6 If your business started after 5 April 2022, enter the start date DD MM YYYY

7 If your business ceased after 5 April 2022 but before 6 April 2023, enter the final date of trading DD MM YYYY

8 Date your books or accounts start – the beginning of your accounting period DD MM YYYY

9 Date your books or accounts are made up to or the end of your accounting period – read the notes if you have filed in box 6 or 7 DD MM YYYY

10 If you used cash basis, money actually received and paid out, to calculate your income and expenses, put 'X' in the box
☐

11 If your accounting date has changed permanently, put 'X' in the box
☐

12 If your accounting date has changed more than once since 2017, put 'X' in the box
☐

13 If special arrangements apply, put 'X' in the box
☐

14 If you provided the information about your 2022–23 profit on last year's tax return, put 'X' in the box
☐

Business income

15 Your turnover – the takings, fees, sales or money earned by your business

16 Any other business income not included in box 15 – also include any COVID support payments such as CJRS

16.1 Trading income allowance – read the notes

SA103F 2023

Page SEF 1

HMRC 12/22



Xaverian College

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

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

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



Xaverian
College

Universal Credit

Please upload the full Universal Credit statement, which is normally four to five pages.

The information must include your name, address, payments date, income and any deductions.



GOV.UK Universal Credit

Home **Tenants** Journal

Statement

Print this statement

Your payment this month is
£1,422
This will be paid by Bp 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.



**Xaverian
College**

Submitting Statements

Please do not upload screenshots or pictures, as these will not be accepted and will cause a delay in processing your bursary application.

Please download the statements by clicking the printer icon in the top right-hand corner to download the full statement. These files should then be saved to the device you are using and uploaded to the 'PayMyStudent' portal.



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



Xaverian
College

Tax Credit Award

Please provide **all** pages for the **current** year. This is usually four to six pages.

HM Revenue & Customs
...A UNIFORMED & NEW SERVICE

Online www.gov.uk/managedtaxcredits
Helpline 0345 300 3900
Textphone 0345 300 3900
For our opening hours go to www.gov.uk/contact-hmrc

Tax Credit Office
HM Revenue and Customs
800 1ER

Date 26/04/2020

Renew online today at www.gov.uk/managedtaxcredits 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
050 001 151 502 032

Check now, no later than 31/07/2020

Please keep this for your records

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 TC903R 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



**Xaverian
College**

Pension

Please upload the full pension statement, which is usually four to five pages.

The information must include your name, address, payments date and amount.



Department
for Work &
Pensions

MR DAVID WELLDON

Our phone number is
Code: 0345 Number: 60 60 265
If you have speech or hearing difficulties you can
contact us using a textphone on
Code: 0845 Number: 60 60 285
If you get in touch with us, tell us this
reference number

The Pension Service 3
Mail Handling Site A
Wolverhampton
WV98 1AF

About your State Pension Date 12 February 2016

Award Notice and Statement of Details

Dear MR WELLDON,

There has been a change in your entitlement to State Pension. The total amount of your State Pension is now less than we told you because you did not have as many National Insurance contributions as were previously recorded or there may have been a reduction in your Additional State Pension. This means that from 11 June 2015 the weekly amount of your State Pension will now be £148.22. From 14 April 2016 the total amount of your State Pension will be £151.57 a week.

The way this has been calculated is shown in the section called 'How your State Pension is made up'.

Although we have paid you too much State Pension, you do not have to pay the pension back to us. Your next payment will be for the new amount.

You may be able to get more Pension Credit because you are now getting less State Pension. We will write to you again about this.

If you want a further explanation of this decision you can phone us on the number shown on the front of this letter. If you do not want to use the telephone you can write to us at the address on the front of this letter.

Carefully check the Statement of Details