|  |  |  |
| --- | --- | --- |
| Scholarships/Studentships Form 98a for **taxable** Scholarship payments paid via payroll | | |
| **Guidance** | | |
| So we can set up the payment of your scholarship, please complete **pages 1 to 4** of this form. Once complete return to sender. **Incomplete forms and missing attachments could delay payment.** We will not accept an electronic signature.  You must inform your school/college of any changes to your name or bank details as quickly as possible.  If you require this document in an alternative format please contact [HR.Helpline@ed.ac.uk](mailto:HR.Helpline@ed.ac.uk)  For information about our privacy policy and how we use your information please go to [Finance Privacy Notice](https://www.ed.ac.uk/files/atoms/files/privacy_information_notice_for_staff_-_golden_copy.pdf) | | |
| **Section 1: Student details** | | |
| Student Name: |  | |
| Payroll Number (if known): |  | |
| Matriculation number (mandatory): |  | |
| Home address: | Address line 1:  Address line 2:  Address line 3:  Post code: | |
| Date of Birth (dd/mm/yyyy): |  | |
| National Insurance number: (If you have not been allocated a NI Number please contact your local DSS Office without delay) |  |  |
| Department / School: |  |  |
| **Section 2: Student status** | | |
| Student status *(please tick)*: | Full time Student  Part-time Student | |
| I am in receipt of paid work from the University in addition to my education award: | Yes  No | |
| If you are in receipt of paid work in addition to your education award please date: | Hours worked per week:  Date employment commenced (dd/mm/yyyy): | |
| My Scholarship exceeds £15,480 a year | Yes  No |  |
| **Section 3: Payment information** | | |
| Payment will be made in monthly instalments on the 28th of each month (if the 28th falls on a weekend, the payment date will be the Friday before). | | |
| **Section 4: Bank Mandate**  "Bank Mandate" details must be completed and signed. The University only makes payment via BACS transfer**.** Please pay future instalments of Scholarship to my Bankers: | | |
| Bank/Building Society name: |  | |
| Branch address: | Address line 1:  Address line 2:  Address line 3:  Post code: | |
| Account Number/roll number: | Branch sort code:   -   - | |
| If you wish your Scholarship to be paid into a Building Society account please enclose a statement from them showing the Building Society requirements. | | |
| Signature: |  | |
| Date (dd/mm/yyyy): |  | |



**Starter checklist**



# Instructions

The University of Edinburgh needs the information on this form before your first payday to tell HMRC about you and help them use the correct tax code. Fill in this form then give it to your employer. Do not send this form to HMRC.

Personal details

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **1** | Last name | |  | | --- | |  | | | | | | | |
| **2** | First name(s) Do not enter initials or shortened names such as Jim for James or Liz for Elizabeth | |  | | --- | |  | | | | | | | |
| **3** | Are you male or female? |  | | Male |  |  | Female | |
| **4** | Date of birth *eg dd mm yyyy* | |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  |  |  |  |  |  |  |  |  |  | | | | | | | |
| **5** | Home address | |
|  | Address line 1 | |  | | --- | |  | | | | | | | |
|  | Address line 2 | |  | | --- | |  | | | | | | | |
|  | Address line 3 | |  | | --- | |  | | | | | | | |
|  | Address line 4 | |  | | --- | |  | | | | | | | |
|  | Postcode  (if your address is in the UK) | |  | | --- | |  | | | | | | | |
| **6** | National Insurance number | |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  |  |  |  |  |  |  |  |  |  |  | | | | | | | |
| **7** | Employment start date (*dd mm yyyy)* | | |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | |  |  |  |  |  |  |  |  |  |  | | | | | |

# 8 Statement

You need to select only one of the following statements A, B or C

A  This is my first job since 6 April and I’ve not been receiving taxable Jobseeker’s Allowance, Employment and Support Allowance, taxable Incapacity Benefit, State or Occupational Pension.

B  This is now my only job but since 6 April I’ve had another job, or received taxable Jobseeker’s Allowance, Employment and Support Allowance or taxable Incapacity Benefit. I do not receive a State or Occupational Pension.

C  As well as my new job, I have another job or receive a State or Occupational Pension.

# Student Loan

For more guidance about repaying go to [www.gov.uk/](http://www.gov.uk/)repaying-your-student-loan

**9**

Do you have one of the Student Loan Plans described below which is not fully repaid?

Yes  If Yes, go to question 10

No  If No, go to question 13

**10**

Did you complete or leave your studies before 6th April?

Yes  If Yes, go to question 11

No  If No, go to question 13

**11**

Are you repaying your Student Loan directly to the Student Loans Company by direct debit?

Yes  If Yes, go to question 13

No  If No, go to question 12

**12**

What type of Student Loan do you have?

Plan 1  Plan 2  Both

###### Student Loan Plans

You’ll have a Plan 1 Student Loan if:

* you lived in Scotland or Northern Ireland when you started your course (undergraduate or postgraduate)
* you lived in England or Wales and started your undergraduate course before 1 September 2012

You’ll have a Plan 2 Student Loan if:

* you lived in England or Wales and started your undergraduate course on or after 1 September 2012
* your loan is a Part Time Maintenance Loan
* your loan is an Advanced Learner Loan
* your loan is a Postgraduate Healthcare Loan

# Postgraduate Loan

For more guidance about funding and repaying go to [www.gov.uk/funding-for-postgraduate-study](http://www.gov.uk/funding-for-postgraduate-study)

For more guidance for employers go to [www.gov.uk/guidance/special-rules-for-student-loans](http://www.gov.uk/guidance/special-rules-for-student-loans)

**13**

Do you have a Postgraduate Loan which is not fully repaid?

Yes  If Yes, go to question 14

No  If No, go to the Declaration

You’ll have a Postgraduate Loan if:

* you lived in England and started your Postgraduate Master’s course on or after 1 August 2016
* you lived in Wales and started your Postgraduate Master’s course on or after 1 August 2017
* you lived in England or Wales and started your Postgraduate Doctoral course on or after 1 August 2018

**14**

Did you complete or leave your Postgraduate studies before 6th April?

Yes  If Yes, go to question 15

No  If No, go to the Declaration

**15**

Are you repaying your Postgraduate Loan direct to the Student Loans Company by direct debit?

Yes  No

Go to the Declaration

# Declaration

I confirm that the information I’ve given on this form is correct.

**Signature:**

**Full name:**

**Date** (dd/mm/yyyy):

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Section 5: Payment / Costing Details (to be completed by School/Department)** | | | | | | | |
| Once the student has completed pages 1 to 4 of the form, the school/college admin team must complete section 5 – Payment Information. The form must be sent for approval in Section 6 before being submitted for payment via a service request within People & Money. Step by step instructions are provided in the [Setting up a Taxable Scholarship Guidance document.](https://uoe.sharepoint.com/sites/FinanceSpecialistServices/SitePages/Taxable-Scholarships.aspx?csf=1&web=1&e=ggy5G9&cid=e6630bb8-f6f3-48ad-bfa2-94d1dcc4e907) Please note:   * The initiating School / College Office should retain a copy of this form. * Any changes to the Scholarship i.e. change of name, bank details, amount, costing information, must be submitted to HR Operations using the [Taxable Scholarship change notification.](https://www.ed.ac.uk/human-resources/a-to-z-of-forms) * Payroll Services must be notified immediately if the Scholarship terminates * Scholarship forms must be with HR by the **3rd** of the month for payment in current month | | | | | | | |
| **Declaration** | | | | | | | |
| I have checked the status of the student and the scholarships payments are deemed taxable and should be paid via Payroll Services. Separate guidance is available for Scholarships deemed “non-taxable”. Please refer to the guidance provided on the [Finance Operations SharePoint site.](https://uoe.sharepoint.com/:u:/r/sites/FinanceSpecialistServices/SitePages/Non-taxable-Scholarships.aspx?csf=1&web=1&e=wvutoG) | | | | | | | |
| **Payment information** | | | | | | | |
| Annual payment information for Payroll should be supplied below. Please tab to the next section to populate Totals. | | | | | | | |
| Annual amount Year 1: |  | Monthly amount: | £0.00 | From: |  | To: |  |
| Annual amount Year 2: |  | Monthly amount: | £0.00 | From: |  | To: |  |
| Annual amount Year 3: |  | Monthly amount: | £0.00 | From: |  | To: |  |

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Please complete the costing details below.** For further guidance please refer to the [Chart of Accounts Guidance.](https://uoe.sharepoint.com/sites/FinanceHub/SitePages/Chart-of-Accounts.aspx)  If costs related this assignment are to be charged in part or total to cost centre 30010003 (research salary control account) a research salary management labour schedule may need to be created or amended. Please liaise with your school research administration team to provide this information if required. | | | | | | | | | | | |
|  | | **% Split** | **Entity**  **(3 digits)** | **Fund**  **(6 digits)** | **Cost Centre**  **(8 digits)** | | **Analysis**  **(6 digits)** | | **Portfolio**  **(8 digits)** | **Product**  **(8 digits)** | **Intercompany**  **(3 digits)** |
| **Guidance** | | **MANDATORY**  **% Split of the costing** | Driven by payroll element | **MANDATORY**  **Required to capture the type of funding the payroll cost is attached to​** | **MANDATORY**  **Organisational Unit (department)** | | **Likely to always be zero** | | **Likely to always be zero** | **Likely to always be zero** | **For cross charging to or from a subsidiary** |
| EXAMPLE | | 100% | 110 | 123456 | 12345678 | | 000000 | | 00000000 | 00000000 | 000 |
| \*Directly Funded by Research- in all cases | | 100% | 110 | 110002 | 30010003 | | 000000 | | 00000000 | 00000000 | 000 |
| **Costing Split 1** | |  |  |  |  | |  | |  |  |  |
| **Costing Split 2** | |  |  |  |  | |  | |  |  |  |
| **Costing Split 3** | |  |  |  |  | |  | |  |  |  |
| **\*If Directly funded by Research please also provide the cost centre relating to the school or department** | | | | | | | | | | | |
| **COPIES OF THE FOLLOWING MUST BE ATTACHED:** | | | | | | | | | | | |
| The offer letter to the student  The Grant Funding Body or Source of funding and annual sums payable  EPSRC Funded  P45 or completed Starter Checklist (page 3-4) | | | | | |  | | | | | |
| **Section 6: Scholarship Agreement - Verified and authorised by Head of School/Authorised Signatory** | | | | | | | | | | | |
| **Signed:** |  | | | | | **Position:** | |  | | | |
| Once the form is completed and approved, please submit the form via a People & Money service request under category “Taxable Scholarships” under “Forms”. For guidance, please refer to the [How to raise a service request in People & Money](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides) user guide. | | | | | | | | | | | |