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THE UNIVERSITY OF YORK UNDERGRADUATE BURSARY POLICY 2012/13

This document sets out how the Undergraduate Bursaries at the University of York, will be administered. The same policy applies to: students studying at the Hull York Medical School (HYMS), who are registered at the University of York; the PGCE Undergraduate Bursary and to the Foundation Year Bursary.

UNDERGRADUATE BURSARY ELIGIBILITY

The course:
- Must be at either undergraduate level or PGCE.
- Fees must be entirely the responsibility of the student. Therefore courses funded by NHS are excluded.
- Fees must be the maximum charged for home students at this University. Students paying reduced fees because they are on a placement year or are studying abroad are not eligible for the bursary during that year.

Student status:
- The University is offering the Undergraduate Bursary to UK students who have been assessed to receive the Maintenance Grant. In order to be assessed for the Maintenance Grant the student must apply for means tested financial support. The assessment process (carried out by Local Authorities, Student Finance England, Northern Ireland, Wales and the Students Awards Agency for Scotland) provides the University with the family’s residual household income information. This is used to determine the level of Undergraduate Bursary to be awarded.
- Students from the Isle of Man and the Channel Islands are not eligible for an Undergraduate Bursary.
Income status:
- 2006/07 and 2007/08 starters must have a residual household income of £39,333 or less.
- Students starting from 2008/09 onwards must have a residual household income of £41,040 or less.

Closing date:
The Undergraduate Bursary is publicised by the SFSU throughout the financial year: using the prospectus, the University website, posters, York Extra bulletins, YUSU email, YUSU Daily Info and presentations. Therefore it is reasonable to expect students who think they may be entitled to the award to contact the SFSU if they have not received an Entitlement Letter before the 31st July. Failure to do so will result in the loss of entitlement for that financial year.

Retrospective payments:
Awards will not normally be made retrospectively however exceptional circumstances will be considered on a case by case basis. If an award is made in retrospect it will only apply to the previous year.

Assumptions:
- Where the rest of this document refers to students it is assumed that the students already meet eligibility criteria for the Undergraduate Bursary.
- The fees mentioned in this document relate to tuition fees.

Circumstances may arise that are not covered by this policy document. These will be considered on an individual basis by the Manager of the Student Financial Support Unit after communication with the student.

UNDERGRADUATE BURSARY PAYMENT DETAILS

The University uses the Higher Education Bursary Scheme for Students (HEBSS) database to process the Undergraduate Bursary payments. HEBSS is a Student Loans Company (SLC) database and payments will be made directly into student bank accounts.

Consent to share:
When an application (PN1 or PR1 form) for support is completed it is assumed that consent has been given unless one of the parties has ‘opted out’ by checking the tick box in the declaration section of the form.
• If the student has not consented their name will not appear at all on HEBSS.

• If one or more of the sponsors/parents have not consented the student record will not show the residual household income, only a ‘£’ will be visible in that field on HEBSS.

• Consent can be given at any time. Once the Local Authority has carried out an initial assessment the consent status can only be amended by the SLC. Students and sponsors/parents can give consent by telephoning the SLC using the Bursary Helpline number: 0845 603 4016.

Where students meet the bursary rules (eligibility criteria), HEBSS will automatically bring forward their records for Approval. Approving an award automatically generates an Entitlement Letter.

It is possible for Bursary entitlement to alter if the student’s household income is reassessed at any time during the year. This may result in a different level of award or no award if the household income rises above the threshold.

If consent to share information is withdrawn after a bursary award has been approved, the bursary will be cancelled because the University is no longer able to see the household income figure and this could be an indication that the student no longer meets the eligibility criteria, e.g. entitlement to the Maintenance Grant.

If full consent is not given and the student can provide written documentation proving that he/she has been assessed to receive the Maintenance Grant and the level of Grant being awarded, the SFSU can approve a manual award.

Payments of all the awards except for the Foundation Year Bursary will be made as follows:

• Payments will be made in two instalments: February week 2 and May week 1.

The Foundation Year Bursary will be paid in full in February week 2.

• Payments will be made directly into the student bank account. It is the responsibility of the student to ensure that the SLC have the correct bank details.
• If the SLC make a payment and it fails, the SLC will contact the student to verify the bank details. The SLC will then resubmit the payment instruction.

Where a student applies late or consent has been delayed and the bursary payment date has already passed, the bursary will be paid as soon as possible. For example if the February date has passed, but not the May date, the student will receive 50% of the bursary as soon as can be arranged followed by the May payment on the due date. If the May date has passed, the student will receive the full bursary as soon as possible.

Discrepancies between the Attendance Confirmation Record (ACR) and the information held by the SLC will delay bursary payments. Where this causes the student financial difficulty the SFSU will either:

• cancel the automated award and add a manual award on HEBSS. This award would not be dependent on the ACR file; or

• cancel the payment through the HEBSS system and arrange for a payment via the Agresso system, using a University payment pro-forma.

INTERCALATING HYMS STUDENTS

Where a HYMS student chooses to intercalate at The University of York, they will only be considered for the HYMS Undergraduate Bursary. The student is only able to intercalate because they are on the HYMS programme and therefore should be treated as a HYMS student during the intercalating year.

STUDENTS EXPERIENCING HARDSHIP

Where a student who is eligible to receive an Undergraduate Bursary is experiencing hardship before the first payment date, the student should apply to the Access to Learning Fund for assistance. This may result in either an award or a loan from the Fund. The Undergraduate Bursary payment date will not be brought forward.
STUDENTS WHO TRANSFER OR WITHDRAW

On receiving notification from the Student Administration Office that a student is no longer at the University the SFSU will:

- If the student is on HEBSS and has been awarded a bursary, cancel the award.

  **Note:** It is possible that the student may have already received some or all, of the bursary by the time the SFSU is notified.

- At the end of the financial year all of the notifications are checked against SITS/SAM records to ascertain how much has been paid to the University in fees. This is compared to how much Bursary has been paid to the student. Where the proportion of fees received exceeds the bursary paid, a manual award for the amount still owed to the student, will be placed on HEBSS. E.g. if the fees have been paid in full and only 50% of the bursary has been paid to the student, the remaining 50% will be paid as a manual award.

  The University will not ask students to repay any overpayment.

STUDENTS WHO TAKE LEAVE OF ABSENCE (LOA)

Once the SFSU receive notification from the Student Administration Office that a student is on LOA the following process takes place.

- If the student is on HEBSS and has been awarded a bursary, the bursary is cancelled.

  **Note:** It is possible that the student may have already received some or all, of the bursary by the time the SFSU is notified.

- At the end of the financial year all of the notifications are checked against SITS/SAM records to ascertain how much has been paid to the University in fees. This is compared to how much Bursary has been paid to the student. Where the proportion of fees received exceeds the bursary paid, a manual award for the amount still owed to the student, will be placed on HEBSS.

How much bursary a student who takes LOA is entitled to, is directly linked to how much they have paid in fees. See below for examples.
**Student A:**
Takes LOA and will repeat the entire year on return. Partial fees have been paid

- The student should only receive a proportion of the bursary e.g. if one third of the fee has been paid by the student, only one third bursary should be paid. Any overpayment will not be reclaimed.
- On returning there will be a full year’s fee liability and a full year’s bursary entitlement.

**Student B:**
Takes LOA and will repeat the entire year on return. Full fees have been paid

- The student should receive the full bursary.
- On returning there will be a full year’s fee liability and a full year’s bursary entitlement.

**Student C:**
Takes LOA and will not be repeating study on return. Partial fees have been paid

- The student should only receive a proportion of the bursary e.g. if one third of the fee has been paid by the student, only one third bursary should be paid. Any overpayment will not be reclaimed.
- On returning there will be a partial year’s fee liability and a partial year’s bursary entitlement.

**Student D:**
Takes LOA and will not be repeating study on return. Full fees have been paid

- The student should receive the full bursary.
- On returning the student will only be expected to pay the inflationary increase in fees when they resume their studies and will be paid the inflationary increase in bursary. E.g. 2009/10 fees are £3,225, in 2010/11 they will be £3,290 – the inflationary difference is £65.
STUDENTS WHO ARE NO LONGER ELIGIBLE FOR SUPPORT

This can happen after the student has been reassessed due to a change in their circumstances. This should not affect tuition fees: the student has either taken the Tuition Fee Loan (TFL) or intends to pay the University direct.

- Students will not be asked to repay any Undergraduate Bursary that has already been paid.
- The student will no longer be eligible for further bursary payments because the residual family income exceeds the income thresholds, or they are no longer eligible for the Maintenance Grant.

UNDERGRADUATE BURSARY ADJUSTMENTS

Overpayments:

- Overpayment of the bursary may occur if the student is re-assessed by the Local Authority or if the SFSU receives notification that the student has withdrawn, when it is too late to prevent the payment.
- Where possible an overpayment will be corrected by adjusting the second instalment for the year. Where the second instalment has also been paid, no further attempt will be made to recoup the money.

Re-assessment Leading To Increased Undergraduate Bursary Entitlement:

- The next bursary instalment will be at the higher level.

WHO SETS THE BURSARY LEVELS

The Director of Admissions and Schools Liaison, the Manager of Student Support Services and the Student Financial Support Unit Manager submit proposed figures to Council who if in agreement ratify them.

Council have agreed that the 2009/10 Undergraduate Bursary awards will not be uplifted for 2010/11 in line with the percentage increase to fees.

A different process applies to HYMS Undergraduate Bursaries because these have to be agreed with Hull University. As of 2009/10, HYMS bursaries have been frozen to be reviewed by the Registrars of The University of York and Hull University.
## Bursary Schemes Currently Available

### 2006/07 and 2007/08 Starters

<table>
<thead>
<tr>
<th>Bursary Name</th>
<th>Residual Household Income</th>
<th>Bursary Amount</th>
</tr>
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<tbody>
<tr>
<td>Undergraduate Bursary 1</td>
<td>Up to £18,360</td>
<td>£1,508</td>
</tr>
<tr>
<td>Undergraduate Bursary 2</td>
<td>£18,361 - £29,466</td>
<td>£1,078</td>
</tr>
<tr>
<td>Undergraduate Bursary 3</td>
<td>£29,467 - £39,333</td>
<td>£646</td>
</tr>
<tr>
<td>PGCE Undergraduate Bursary</td>
<td>Up to £18,360</td>
<td>£320</td>
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<tr>
<td>HYMS Undergraduate Bursary 1</td>
<td>Up to £24,214</td>
<td>£1,078</td>
</tr>
<tr>
<td>HYMS Undergraduate Bursary 2</td>
<td>£24,215 - £39,333</td>
<td>£540</td>
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### 2008/09 Starters onwards

<table>
<thead>
<tr>
<th>Bursary Name</th>
<th>Residual Household Income</th>
<th>Bursary Amount</th>
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<tbody>
<tr>
<td>Undergraduate Bursary 1</td>
<td>Up to £25,000</td>
<td>£1,436</td>
</tr>
<tr>
<td>Undergraduate Bursary 2</td>
<td>£25,001 - £35,910</td>
<td>£718</td>
</tr>
<tr>
<td>Undergraduate Bursary 3</td>
<td>£35,911 - £41,040</td>
<td>£360</td>
</tr>
<tr>
<td>PGCE Undergraduate Bursary</td>
<td>Up to £25,000</td>
<td>£320</td>
</tr>
<tr>
<td>HYMS Undergraduate Bursary 1</td>
<td>Up to £25,000</td>
<td>£1,000</td>
</tr>
<tr>
<td>HYMS Undergraduate Bursary 2</td>
<td>£25,001 - £40,000</td>
<td>£500</td>
</tr>
<tr>
<td>Foundation Year Bursary</td>
<td>Up to £25,000</td>
<td>£300</td>
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TERMINOLOGY

Direct Payers – students choosing not to take the Tuition Fee Loan.

LOA – Leave of Absence

SFSU – Student Financial Support Unit

SLC – Student Loans Company

TFL – Tuition Fee Loan

Ug. Office – Undergraduate Office