

Version: March 2022

GUIDANCE NOTES FOR CANDIDATES

These notes will take you through how to fill out the means assessment form.

Awards will be made on the basis of our assessment of your financial circumstances as supplied through this application form.

Support for applicants with disabilities

Communications about these awards will be predominantly by email, and the application form is online. If this will cause you any difficulty, please contact us at joanna.ashbourn@stx.ox.ac.uk (Senior Tutor - Academic Affairs & Programmes) to discuss alternative formats (e.g. being able to apply on paper using an application form in Word).

Queries

If you have any queries about applying for these awards or need technical support, please contact us at joanna.ashbourn@stx.ox.ac.uk (Senior Tutor - Academic Affairs & Programmes).

About the questions in the application form

We estimate that if you have the relevant information to hand, it will take you about 20 minutes to complete the form. Here are the sections of the form for which you will need to get together your data:

- Your household composition and household income for the 12 months from 1 September 2020 to 31 August 2021
- Your funding for your proposed course at Oxford
- Your assessment of your need of this scholarship
- Your expected fee status at the University

How to complete the section on your Household composition Q9 – 15

In this section we ask about your household. Your household is the group of people you ordinarily live with as a family, and with whom you share household expenditure. This could include parents/guardians and/or a husband/wife/civil partner/partner (a civil partner is a person who has legally registered his/her partnership with another person). It would **not** normally include people with whom you share a flat/apartment/house as housemates, unless these people will be directly contributing financially to your studies. You may temporarily be living away from your household/family, e.g. for the purposes of studying, but this is not relevant, since we require information about the people you *ordinarily* live with.

Question 14 & 15

A dependent can be anyone – child/children, grandparents, disabled parent, or spouse – that you are financially responsible for.

How to enter your Household Income Q16 – 21

In this section, some of the questions are about your parent(s)/guardian(s). We anticipate that these will be the one or two people most closely involved in your upbringing. You may select birth parents,

adopted parents, step-parents, foster parents, carers or guardians as best fits your own circumstances.

Please state all annual net income figures anticipated for the period 1 September 2020 to 31 August 2021. This includes:

- “take-home pay” (salary **after** tax and other deductions)
- income from pensions or state benefits
- rental income from any property/properties in which you do not live
- interest on savings

It does **not** include any bonuses or benefits in kind. Please state your annual net income **before** any household bills (e.g. rent/mortgage, food bills, loan repayment, childcare cost, utility bills etc.) are paid.

If a salary is part-time, please include the actual annual net amount earned (after tax and other deductions), **not** the full-time equivalent.

Please enter the amount in UK pounds (£). If your household income is not in UK pounds (£), convert the local currency into pounds using the [provided exchange rates](#) *[please note these rates are updated by the HMRC at the end of each financial year]*.

You **must** use the supplied exchange rates and not any *other* exchange rates.

Please respond to the questions below **to the best of your ability**. If you do not know the exact amount for any of these questions, please give your best estimate.

If your household circumstances changed within the period 1 September 2020 to 31 August 2021, please report the latest circumstances during that period. If your household circumstances subsequently changed after 31 August 2021 (or if a change in circumstances is expected), please provide up to date details at Question 21.

[Funding for your proposed programme Q22](#)

In this section we ask about your plan to fund your studies by establishing the type of income within your household that can be allocated towards yours programme. The questions will cover income from various sources such as savings, money from relatives or friends, other scholarships, private sponsors, or any other funding that you may have available. The section is split to show funding that is guaranteed to be available, and funding that you have applied for/will apply for or hope to receive. There is also a section to show whether you plan to take out any loans to fund all or part of your studies.

Please remember to follow the above guidance on providing **net** amounts for all income.

[How to submit your application](#)

Once you have completed all questions, please click the submit button. The software will check that you have completed all mandatory questions and that answers are in the correct format, where applicable (e.g. numbers). If there are still questions which have not been completed or your answers are not in the correct format, you will see a message which will provide you with a list of missing/incorrect fields. These fields will also be highlighted in red on the form so that you can easily find the missing/incorrect responses. You will only be able to submit successfully if all fields are properly completed.

Please note that once you have successfully submitted your form, you will not be able to access it again, so do not submit until you are happy with all your answers. If your circumstances change after you have submitted your form and you need to provide us with an update, please contact us using the details provided above.

When you successfully submit your form, you will see a page informing you of the closed state of your application, and receive an email confirming its submission.