

# Section 7: Family Financial Circumstances

This question asks you to tell us who contributed to your family's income in 2021. Your family income may come from:

- Employment
- Social Welfare
- Pensions
- Rental Property
- Farming

## 7.1 Who contributed to your family's income in 2021?

**Fill in section 7 with your parent(s)/guardian(s). Entering inaccurate information in this section will affect the outcome of your HEAR Application.**

Tick who contributed financially to your family's income in 2021. If your parent(s)/guardian(s) are separated/divorced only fill in the income of the parent that you live with most of the time.

**Section 7. Family Financial Circumstances**

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Please note this section relates to the year 2021 only. [Click here for help.](#)

Warning: Complete Section 7 with your parents or guardians. Entering incorrect information or failure to answer all questions in this section will affect the assessment of your HEAR application.

Select who contributes to your family's income.

Mother    Father    Guardian 1    Guardian 2

Enter your Mother's Full Name:

Enter your Father's Full Name:

**(click to save your details and continue on to complete the form)**

## 7.2 Family financial circumstances

Please list all sources of income your parent(s)/guardian(s) received in 2021 excluding child benefit. You must tick yes or no to all types of income.

Type of Income	Mother/ Guardian 1	Father/ Guardian 2	Document Required
Was your parent/guardian in paid employment in 2021 on a full, part time or temporary basis?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	<b>Statement of Liability for 2021</b> from Revenue Commissioners. <b>See Page 19</b>
Was your parent/guardian self-employed, engaged in farming, or receiving rent from rental properties in 2021?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	<b>Self-Assessment – Chapter 4 for 2021</b> from Revenue Commissioners or Tax Exemption Letter. <b>See Page 19</b>
Did your parent/guardian receive any social welfare payments in 2021 other than child benefit?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	<b>Department of Social Protection (DSP) Form or DSP Statement for 2021.</b> <b>See Page 23</b>
Did your parent/guardian receive any lump sum payments in 2021 from his/her former employer as a result of being made redundant?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Form <b>RP50</b> Notification of Redundancy OR Letter from Employer <b>See Page 24</b>
Was your parent/guardian retired in 2021?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	<ul style="list-style-type: none"> <li>• <b>Retirement Lump Sum Letter</b> from Employer (Page 24) and/or</li> <li>• <b>Statement of Liability for 2021/ Self-Assessment – Chapter 4 for 2021</b> and/or</li> <li>• <b>Department of Social Protection (DSP) Form or DSP Statement for 2021.</b> (Page 23)</li> </ul>

# Supporting Document Section

## Supporting Document Checklist

You can use the table on page 17 to work out what types of documents you need to supply.

Review each question and answer Yes/No to each. Where you answer Yes, check the “Document Required” column. This tells you what documents you must send to the CAO by 15 March 2023.

If you have indicated income from both parents you must submit documents detailing both their incomes. HEAR requires evidence of a full year’s income for 2021 (i.e. 52 weeks).

### How to request supporting documents from the Revenue Commissioners.

If your parent(s)/guardian(s) received income from employment, self-employment, land, farming or rent from rental properties:

- You must submit your parent(s)/guardian(s) Statement of Liability or a Self-Assessment – Chapter 4 for 2021.
- If they are exempt from paying tax provide a tax exemption letter from Revenue.
- Supply documents for both parent(s)/guardian(s). If they are jointly assessed one document is sufficient.
- Submit both pages of a Statement of Liability including front and back. If only one page is submitted, it cannot be assessed.
- In all cases where you are submitting a Self-Assessment – Chapter 4 or Notice of Assessment all pages are required.

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### What is a Statement of Liability?

A Statement of Liability is the new name for the Revenue statement that was previously called a P21. A Statement of Liability is a statement of total income, tax credit and tax paid for a particular tax year for people in paid employment who pay all of their income tax under PAYE (Pay As You Earn). You do not automatically receive a Statement of Liability from Revenue; you must request this document.

**Your Employment Detail Summary will not be accepted.**

**Request your Statement of Liability online at [www.revenue.ie](http://www.revenue.ie).**

## How do I request a Statement of Liability for 2021?

The quickest and easiest way for your parent(s)/guardian(s) to get their Statement of Liability is by clicking on the myAccount link on the Revenue website at [www.revenue.ie](http://www.revenue.ie). There is a simple registration process and a PIN will be issued by post in 5-8 working days. Your parent/guardian should log in using this PIN and request the Statement of Liability. If your parent(s)/guardian(s) have chosen to receive correspondence electronically, the Statement of Liability will be available by clicking on the My Documents tab, otherwise the Statement of Liability will be posted to them.

Your parent(s)/guardian(s) may also request a Statement of Liability by submitting a paper Income Tax Return.

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## What is a Self-Assessment – Chapter 4?

A Self-Assessment – Chapter 4 is a statement of total income or profits, tax chargeable and tax paid for a particular tax year for people who are: self-employed, directors, and/or receiving income of any kind where some or all of the tax cannot be collected under the PAYE system. Do not submit Form 11 as this is not a required document and will not be accepted.

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## How do I request a Self-Assessment – Chapter 4 for 2021?

A Self-Assessment – Chapter 4 will be in your parent(s)/guardian(s) Revenue On-Line Service (ROS) inbox after they have completed their return and self-assessment for 2021.

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## What if parent(s)/guardian(s) cannot get a Self-Assessment – Chapter 4 document?

A Notice of Assessment – Chapter 4 will be issued by Revenue to parent(s)/guardian(s) who file a paper tax return to Revenue and who do not complete a self-assessment on that return. The majority of self-employed Revenue customers receive a Self-Assessment – Chapter 4.

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## What if my parent(s)/guardian(s) have a 'Notice of Amended Assessment (Chapter 4)' or 'Notice of Amended Assessment (Chapter 5) for 2021'?

If your parent(s)/guardian(s) have a 'Notice of Amended Assessment - Chapter 4' or 'Notice of Amended Assessment – Chapter 5 for 2021' from Revenue you should send this document to the CAO. Where a Notice of Amended Assessment – Chapter 4 or Notice of Amended Assessment – Chapter 5 for 2021 is received HEAR will not require a Self-Assessment - Chapter 4 or Notice of Assessment – Chapter 4.

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## **How long will it take for Revenue to issue a Statement of Liability or Self-Assessment– Chapter 4?**

It is essential that you apply for a Statement of Liability early. Statement of Liabilities can take several weeks to issue. If your parent(s)/guardian(s) do not have a Self-Assessment – Chapter 4 (or a Notice of Assessment) for 2021 they need to complete their Tax Return and Self-Assessment for 2021 on ROS as soon as possible.

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## **If one parent/guardian was PAYE and one parent/guardian was self-employed what document do I submit?**

- A Self-Assessment – Chapter 4 for 2021 if parent(s)/guardian(s) are jointly assessed by Revenue.
- OR
- A Statement of Liability for 2021 and a Self-Assessment – Chapter 4 for 2021 is required if parent(s)/guardian(s) are separately assessed by Revenue.
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## **What if my parent(s)/guardian(s) earned income from outside the Republic of Ireland in 2021?**

HEAR requests that you provide the Revenue equivalent of supporting documents for the tax year 1 January 2021 to 31 December 2021. See [accesscollege.ie](http://accesscollege.ie) for details.

You can also contact a member of the HEAR team for further information. Contact details are listed on page ii.

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## **What if my parent/guardian is self-employed and is also in receipt of a Social Welfare payment?**

Submit a copy of a Self-Assessment – Chapter 4 for 2021, plus a Department of Social Protection form or statement for 2021 as outlined on page 23.

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**Please do not submit original documents. Documents will not be returned by CAO. Send good quality photocopies including front and back of all pages.**



## How do I complete the Department of Social Protection (DSP) form or statement?

If your parent(s)/guardian(s) received income from the DSP in the year ending 31 December 2021, you must provide the following four pieces of information from the DSP:

- The total amount of social welfare income received in 2021.
- The name of the person(s) receiving the payment.
- The name of the payment(s) received.
- The date the payment started and the date the payment stopped (if applicable). The DSP form is included at the back of this handbook or you can download it from your online HEAR Application.

Ask your parent(s)/guardian(s) to have the local DSP Office Complete, Sign and Stamp your DSP Form. Alternatively your parent(s)/guardian(s) can request a copy of their DSP payment statement online at [www.welfare.ie](http://www.welfare.ie).

You can submit the DSP form or a statement from DSP. Remember HEAR requires evidence of a full year's income for 2021 (i.e. 52 weeks). Some applicants, depending on their parent(s)/guardian(s)' circumstances in 2021, may need to submit Revenue documents and/or evidence of other income as well as evidence of DSP income.

**HEAR** HIGHER EDUCATION ACCESS ROUTE  
Request for Information from the Department of Social Protection  
CAO Office Use Only

Your parent(s)/guardian(s) must complete Part 2 and submit this form at their local DSP Intro Centre. Keep a photocopy and proof of postage. Submit all documents to CAO by 15 March 2023. It is the responsibility of every applicant to ensure both pages of this form are filled in correctly.

**Part 1: To be completed by HEAR Applicant**

HEAR Applicant's Name:   
Address:   
CAO Number:   
Date of Birth:   
PPS Number:

**Part 2: To be completed by applicant's Parent(s)/Guardian(s)**

I authorise the release of information outlined below for the purposes of assessing a HEAR application.

Parent 1/Guardian 1 Signature:   
Parent 2/Guardian 2 Signature:   
PPS Number (Parent 1/Guardian 1):   
PPS Number (Parent 2/Guardian 2):

**Part 3: To be completed by DSP Official**

Parent 1/Guardian 1 Name:

Please do not alter the year for which information is required on this form.

Total Social Welfare Income on all social welfare schemes\* previously paid to this PPS number in the year 2021?

In receipt of means-tested social assistance payment(s) for at least 26 weeks or 6 months in the year 2021?  YES  NO

Name of Payment(s):  
Payment 1:   
Payment 2:

\* Excluding Child Benefit and certain supplements paid under the Supplementary Welfare Allowance schemes.  
This is page 1 of a 2 page form. Page 2 must be completed, signed and stamped. 1/2

### Important Instructions

- You can find your local Social Welfare Office at [www.welfare.ie](http://www.welfare.ie).
- If you misplace your form you can download it again from your online HEAR application or find it at [www.accesscollege.ie](http://www.accesscollege.ie). It is your responsibility to make sure all forms have been signed, stamped and completed with the correct information by the Department of Social Protection.



## Lump Sum Redundancy/Retirement Payments

If your parent(s)/guardian(s) received any lump sum payments in 2021 from his/her former employer as a result of being made redundant or retiring from employment, you must submit:

- All pages of Form RP50 Notification of Redundancy
- OR**
- A letter from your parent(s)/guardian(s)' last employer or body administering pension showing:
    - Date employment ceased.
    - Gross amount of lump sum received in the year ending 31 December 2021.
    - Number of years in that employment.
    - Gross annual pension.

Online application for  
**Redundancy Payment under the  
Redundancy Payment Acts 1967 to 2012**

For Office use only

• Part 1, 3, 4, 5 and 6 must be completed for all applications.  
• Part 2 must be completed if company is in liquidation, receivership or examinership.

Session Timer: 50:27

**Part 1** **Employer's details** [Save Details](#)

1. Employer's PAYE No.: [grid]

2. Employer's registered name: [grid]

3. Trading name: (if different from above) [grid]

4. Correspondence address: [grid]

County:

Country: [grid]

5. Business sector:

6. Reason for redundancy:

7. Please state what you are claiming for (insert an 'X')

**Employer Rebate claim** (Claim by employer for rebate on basis of statutory redundancy for non-qualifying or employee dismissed for reason of redundancy. Refer to claimant's Handbook for details at section 1.1.1.1.1.1.1)

or

**Employee Lump Sum claim** (Claim by employee who has not received their full statutory redundancy payment from their employer)

Sample Form RP50

**Lump Sum on Retirement**

To be completed by HEAR Applicant

RE:

HEAR Applicant CAO PPS Number

To be completed by Employer or Body Administering Pension

(NAME) ceased employment with this company on  (dd/mm/yyyy).

**Lump Sum Payment:**  
The above received €  as a lump sum on retirement in the year ending 31 December 2021.

**Number of Years in Employment**  
The above worked for  (NUMBER OF YEARS) in our employment.

**Gross Annual Pension**  
The total gross annual pension for above is € .

Signature of Employer/Body Administering Pension  Date

**Company Stamp**

Sample Retirement Lump Sum Letter