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Summary of rules

This document sets out the rules that affect the fees, fee liabilities, fee refunds and fee credits for students studying postgraduate modules or qualifications. They explain the circumstances in which you may receive fee refunds or fee credits, The Open University's discretionary fee refunds and credits policy, when you may become liable to pay fees, as well as what The Open University might do if you do not pay your fees.

Summary of significant changes since last version

There are a number of significant changes from the previous version of this policy (Fee Rules (Postgraduate Study) 2018/19). These are:

- a) Removal of Section C "Your fee liability when studying under a partnership agreement with another provider", as Scope section clarifies that these students are not covered by this policy
- b) Addition of paragraphs C6, C7 and D4 (previously D6, D7 and E4) to explain how we will monitor engagement in study and why
- c) Addition of reference to Student Protection Plan and Refund and Compensation Policy to paragraph D11
- d) Removal of paragraph D9 (previously E9) as it repeats the content of paragraph D1 (previously E1)
- e) Removal of reference to the day a module begins in paragraph F2 as it is not relevant
- f) Combined paragraphs G2 and G3 to make section easier to read
- g) Removed paragraph G12 (as numbered in previous version), regarding transfer of study from *MBA stage 1: management: perspectives and practice (fast-track) (BXFT716)* to *MBA stage 1: management: perspectives and practice (B716)*, as modules are no longer being presented
- h) Moved content in section H, specifically section H7 (previously section I), so that the section was easier to understand
- i) Addition of caring responsibilities as Discretionary Fee Credit and Refunds criteria in Appendix 2
- j) Removal of Appendix 3 paragraph 3.2 and amendment to paragraph 3.3 to reflect current rules.
- k) Update to the Scope to clarify that Microcredential students are not in scope.

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Fee Rules that are superseded by this document

This document replaces the previous version of [Fee Rules \(Postgraduate Study\) 2018/19](#) and any versions prior to this date.

Scope

Who do these Fee Rules apply to?

These Fee Rules cover matters concerning fees and funding for taught postgraduate modules that you are registered for (either on a standalone basis or as part of a declared postgraduate qualification) during the 2019/20 Academic Year. For any subsequent modules that you study, the Fee Rules in force at that time will apply.

This document may be updated throughout the year to correct errors, improve clarity or accessibility, or to reflect changes in legal or regulatory requirements.

What this document does not cover

This document does not apply to students:

- studying towards an undergraduate or integrated masters qualification, or an undergraduate module on a standalone basis. Please see [Fee Rules \(Undergraduate\) 2019/20](#).
- studying postgraduate modules that fall within an academic year other than 2019/20. Please see the Fee Rules in force for that academic year.
- studying for a Postgraduate Research Degree.
- studying as part of an Apprenticeship Programme. Please contact your [Apprenticeship Programme Delivery Manager \(APDM\)](#).
- studying a Microcredential via the FutureLearn platform. Please see [Terms and Conditions \(Microcredentials\) 2019/20](#).

Related Documentation

Please refer to the following documentation in conjunction with these Fee Rules:

- [Conditions of Registration](#)
- [Changing Your Study Plans Policy](#)
- [Assessment Banking Rules](#)
- [Student Complaints and Appeals Procedure](#)

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- [Student Protection Plan](#)
- [Refund and Compensation Policy](#)
- [Student Privacy Notice](#)

The Open University Student Charter Principles

These Fee Rules align with the following [Open University Student Charter](#) Principles:

- Principle 2: We aim to inspire and enable learning

Introduction

The Open University may charge different fees for students in different countries, for different levels of study, for different modules and for students who start or change their studies at different times. This is because the way in which higher education is funded may be different; the costs of providing educational services may be different; or because we provide a different range of services.

This document explains how to work out which fee scheme applies to you and what this means, so that we can charge you the correct fee for your circumstances.

In addition it explains the rules that apply to you for the payment of fees and the fee refund and credits policy that applies if your circumstances change during your studies.

This document should be read in conjunction with the [Conditions of Registration](#), which you agree to when you register to study with The Open University. The [Conditions of Registration](#) set out your obligation to pay fees and the implications if these fees are not paid.

For specific guidance on how this policy may relate to your personal circumstances, please contact your [Student Support Team](#).

Section A: Setting and changing fees

- A1. Fees are set annually by The Open University Council and are published on each module description on the [online prospectus](#).
- A2. The Open University offers students the flexibility to study qualifications over an extended period of time, and it may therefore be necessary to make changes to fees, the fee rules and fee policies in order to:
- Pass on efficiency gains and cost savings to students;
 - Increase fees to cover additional costs to The Open University;
 - Ensure that, in the case of optional modules only, where there has been an unforeseen increase in costs and/or a significant reduction in student enrolments,

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The Open University is able to offer a module or a wider choice of modules which it would not otherwise be economic to provide without an increase in fees;

- Comply with changes in legal or regulatory requirements;
- Meet additional costs of providing educational services arising from the requirements of a professional body for the recognition or accreditation of a module or qualification;
- Take into account changes in the public funding of higher education or The Open University;
- Introduce, modify or withdraw any offers, discounts and schemes which support, enhance or promote completion of studies or further enrolment to study;
- Take advantage of new technologies, methods, ideas and opportunities.

A3. If there are any significant changes to the fees or Fee Rules, The Open University will give reasonable notice of the changes and the date they take effect.

Section B: Working out your fee liability

- B1. The registration confirmation sets out the fees that you agree to pay for the modules you are registered to study, as well as methods of payment, and the date by which payment should be made. All fees are quoted in pounds sterling.
- B2. The fee which applies to you is based on your 'Home Address' on the first day of the Academic Year in which your first module begins. This must not be a temporary or work address. The Open University reserves the right to request evidence from you to confirm your home address. The residency criteria set out in [Appendix 1](#) are used to work out whether you are eligible for the Standard Fees or the Devolved UK Nation Fee.
- B3. If you are studying a module on a standalone basis, your fee scheme will be reassessed each time you register for a module.

B4. Changes to your home address, country of residence or study location

- B4.1. If you change your place of residency during your studies your fee liability may change. You must notify us within a reasonable time if you change your Home Address or any of your contact details. You are able to do this either online via your StudentHome or by contacting your [Student Support Team](#).
- B4.2. If you move from inside the UK to a non-UK study area, your fee eligibility will change and your entitlement to support from the UK funding authorities may cease.
- B4.3. If you are temporarily resident outside the UK, you must give an address in the UK for delivery of your study materials and arrange for them to be forwarded at your own cost. The Open University will ask for evidence that you are ordinarily and lawfully resident at your Home Address.

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Section C: Payment of your fees

- C1. Your obligation to pay fees is set out in the [Conditions of Registration](#), which also contain the rules on what may happen if those fees are not paid.
- C2. The Open University's acceptance of any form of third party funding for part or full payment of your fees, including tuition fee loans or sponsorship, is dependent on you meeting any requirements set by the funding body for your eligibility to receive such funding. We will normally require confirmation of your eligibility before we agree to your registration. If you are permitted to register under the [Conditions of Registration](#) before the confirmation is received we may cancel your registration under those Conditions if you do not obtain that confirmation within a reasonable time. You will be notified in advance if this is the case.
- C3. If we have accepted payment from you or an agreed payment method that has been confirmed, and subsequently that payment or confirmation is withdrawn or does not fully meet the cost of your module fees, as set out in the [Conditions of Registration](#) we may cancel your registration and recover any fees which are due from you.
- C4. If you are in debt to The Open University you will not be able to register for or pay for future study unless you pay in advance or have in place some other secured method of payment for those tuition fees or charges, which we have accepted. You must also settle the debt or make an arrangement with The Open University to settle the debt. You cannot use a Fee Credit generated from a deferral or withdrawal of a module to reduce the amount of any debt.
- C5. Further information about what The Open University may do if you fail to pay your fees can be found in the [Conditions of Registration](#).
- C6. The Open University must confirm to the government agency awarding any funding you may receive that we are satisfied that you are committed to studying with us and are engaging with your studies. We use information about your participation to confirm that you are studying to the funding authority who will then release payment to you. Further details about the ways we might monitor your engagement and how we will use this information are outlined in the [Student Privacy Notice](#).
- C7. If you are due to receive a payment directly, registration will not be confirmed to the government agency before the first day of the first module in the academic year. This is the point that you become liable for your tuition fees. This means that any maintenance payments due will not be received before this date. You should not expect to receive payment of any funding until at least 1 week after your module has started.

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Section D: Cancelling, deferring or withdrawing from your study

- D1. This section should be read in conjunction with the [Changing Your Study Plans Policy](#).
- D2. Under the Consumer Contract (Information, Cancellation and Additional Charges) Regulations 2013, you have a right to cancel your registration to study a module without giving any reason, within 14 days of the date of confirmation of your registration. To exercise this right to cancel, you should follow the procedure laid out in the [Conditions of Registration](#) and the [Changing Your Study Plans Policy](#).
- D3. If you wish to cancel your registration, or make other changes to your study more than 14 days after the date of the email or letter confirming The Open University's acceptance of your application to register you must follow the instructions in the [Changing Your Study Plans Policy](#).
- D4. In order to appropriately manage public funds, The Open University is required to monitor your engagement and participation in your studies. We will use this information to determine whether we think that you are actively studying towards your registered modules and may ask your Funding Authority to suspend payments to you if we cannot be certain of your participation. Further information is available in our [Student Privacy Notice](#).
- D5. If you cease to study, but you have not informed us that you are deferring using the procedure detailed in the [Changing Your Study Plans Policy](#), you will not be eligible for a fee refund or credit, you will not receive maintenance support instalments you may be due, The Open University will not be able to claim further loan instalments for your tuition fees and your registration may be cancelled.
- D6. The effective date of any deferral or withdrawal for the purposes of calculating any entitlement to a fee refund or fee credit is outlined in Section 5.10 of the [Changing Your Study Plans Policy](#).
- D7. If you have paid your fees using a combination of payment methods, any fee credits or refunds you are eligible for will be applied in proportion to the sums covered by the different payment methods.
- D8. Unless you are entitled to a refund under [Section E 'Fee Refunds'](#), you must still pay the fees you agreed to when you registered, even if you subsequently defer your studies. This applies whether you are self-funding or paying your fees through a credit provider.
- D9. If you have paid your fees using an Open University Student Budget Accounts Limited (OUSBA) loan, and you wish to defer your studies, you should not simply stop studying and/or stop making payments. If you do not formally notify The Open University you will remain liable for the full fees and for making any payments due under your credit agreement. If there is any change to your fee liability or payment schedule as the result of deferring or withdrawing from your studies, OUSBA will contact you directly.

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- D10. Information about fee refunds and fee credits for students who wish to cancel a resit or resubmission of a postgraduate module can be found in [Section I](#).
- D11. If, in the unlikely event that we need to withdraw a module, qualification or programme of study, we will take all reasonable steps to ensure that you are able to continue your studies, as outlined in our [Student Protection Plan](#) and [Conditions of Registration](#). In the rare situation where continuation of studies may not be possible, the [Refund and Compensation Policy](#) outlines the circumstances where any refunds or compensation will be awarded.

Section E: Fee Refunds

- E1. If you cancel during the period outlined in [Section D2](#) above or more than 14 days after the date of confirmation of your registration for a module, but before your Module Start Date, you will receive a full refund of any fees you have paid or a waiver of any fees you are liable to pay for the module(s) you have cancelled. Guidance on how you should do this is provided in the [Changing Your Study Plans Policy](#).
- E2. If you defer or withdraw after your module has started and more than 14 days after the date of confirmation of your registration, you will only be entitled to a refund or fee credit in certain circumstances. Your entitlement will depend on your Home Address and funding method. These entitlements are defined in [Section G](#).
- E3. If your fees have been paid (wholly or in part) by a grant from a UK funding authority or government agency (or equivalent), or by The Open University, you will not be personally eligible for a refund for the grant element of the fee.
- E4. If you have paid your own fees or a sponsor has paid your fees (whether in whole or in part) you may be eligible for a refund and/or a Fee Credit, as outlined in [Section G](#).
- E5. If you change module, any refund of fees due to you will be transferred to your new module. You must pay any difference between the original fee and the fee for your new module before the change can be completed. If the fee for your new module is lower than the original fee, you will receive a refund of the difference.
- E6. Refunds on a third-party payment result in a refund to the third party.

Section F: Fee Credits

- F1. The standard Fee Credit is 25% of the fee for the module you have deferred. You will be awarded this if you defer or withdraw after your Module Start Date but before the the Final Deferral Date.
- F2. A fee credit may be applied to any module which starts within 13 months of your deferred Module's Start Date, or in cases where you intend to study your deferred module again, its next available Module Start Date if this is outside the 13 month period of validity. If you have not used your fee credit within the period of validity, it expires and no refund is given.

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- F3. Fee credits are calculated from the fee paid for the deferred module. When you return to study, you will be liable to pay any difference in the fee for your new module.
- F4. Fee Credits where a third-party has paid fees are credited to the student.
- F5. Deferral with Assessment Banking does not generate any additional fee credit.
- F6. A fee credit can only be used once after the relevant liability period commences. If you use a fee credit together with another payment option for a module and you subsequently withdraw you will not be eligible for a further fee credit for that module.
- F7. Fee credits will not be awarded as a result of the deferral or withdrawal from modules of fewer than 30 credits.
- F8. Fee Credits will not be awarded where the original fee was paid by waiver or credit issued by The Open University.
- F9. You may apply for consideration of a Discretionary Fee Credit or Refund if you defer your studies due to extenuating personal circumstances and can provide evidence of meeting the Conditions specified by The Open University Senate, found in [Appendix 2](#). Further information can be found in [Section H](#).
- F10. If you are studying in Northern Ireland and have paid your fees (wholly or in part) with a tuition fee loan and you defer or withdraw from your studies, you will not be liable for any fees due to be paid by tuition fee loan after that date and your loan liability will be adjusted as appropriate.

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Section G: Levels of fee liability, fee refund and/or fee credit

G1. Students in Northern Ireland

G1.1. When you start studying with The Open University you are allocated a Seasonal Academic Year (SAY), determined by the start date of the first module you study towards your chosen qualification. Your SAY may change if you take a break in your studies or if you change your qualification. The SAYs are defined in Table 1.

Table 1. Seasonal academic years

Module starts within	Seasonal academic year (SAY)	First day of the Seasonal Academic Year
1 August to 31 December	Autumn	1 September
1 January to 31 March	Winter	1 January
1 April to 30 June	Spring	1 April
1 July to 31 July	Summer	1 July

G1.2. If you defer or withdraw before the 14th day of your module you have no funding liability to Student Finance Northern Ireland (SFNI) or to The Open University. The following will apply:

- a) If you or a sponsor have paid the fee we will refund the fee.
- b) If you are intending to pay via a part-time tuition fee loan from Student Finance Northern Ireland (SFNI), The Open University will not draw down any loan funding from this body.
- c) If you have paid with a loan from OUSBA Limited, the loan agreement will be cancelled.

G1.3. If you defer on or after the 14th day of your module you will be liable for fees as set out in Table 2 and Table 3 and will be eligible for a Fee Credit as outlined in [Section F](#).

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Table 2. Modules of less than 52 weeks duration

	Your fee liability			
If your module begins between	0%	25%	50%	100%
1 September - 31 December 2019	Before your module starts or before the 14th day of your module	Day 14 to 31 December 2019	1 January 2020 to 31 March 2020*	1 April 2020 to final deferral date
1 January - 31 March 2020	Before your module starts or before the 14th day of your module	Day 14 to 31 March 2020	1 April 2020 to 31 July 2020*	1 August 2020 to final deferral date
1 April - 30 June 2020	Before your module starts or before the 14th day of your module	Day 14 to 31 July 2020	1 August 2020 to 31 December 2020*	1 January 2021 to final deferral date
1 July - 31 August 2020	Before your module starts or before the 14th day of your module	Day 14 to 31 December 2020	1 January 2021 to 31 March 2021*	1 April 2021 to final deferral date

* or final deferral date, whichever is earlier

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Table 3. Modules of 52 weeks or more duration

	Your fee liability			
If your module begins between:	0%	25%	50%	100%
September - December 2019	Before your module starts or before the 14th day of your module	Day 14 to 31 January 2020	1 February 2020 to 31 May 2020*	1 June 2020 to final deferral date
January – March 2020	Before your module starts or before the 14th day of your module	Day 14 to 30 April 2020	1 May 2020 to 31 August 2020	1 September 2020 to final deferral date

* or final deferral date, whichever is earlier

G2. Students in England, Wales, Scotland, the Republic of Ireland, Europe and the Rest of the World

G2.1. If you defer on or after your Module Start Date, you will be liable for fees as outlined in Table 4 below and will be eligible for a Fee Credit as outlined in [Section F](#).

Table 4. Modules beginning 1 August 2019 - 31 July 2020

	Your fee liability	
If your module begins between	0%	100%
1 August 2019 – 31 July 2020	Before your module starts	Module start to final deferral date

G2.2. If you are a student registered in Scotland using a part-time tuition fee loan towards your module fees, and you withdraw or defer after the module start date but before the dates shown below in Table 5 below, you will not receive a part-time tuition fee loan

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but you will still be liable to pay the full module fee. This will include the fee of any other module you remain registered for if your total credits are less than 30 (as you will no longer meet the credit threshold for a fee loan).

Table 5. Withdrawal cut-off dates for Scottish part-time tuition fee loans

Module Start Date	Withdrawal cut-off date
1 August to 31 December	1 December
1 January to 31 March	1 March
1 April to 30 June	1 June
1 July to 31 July	1 July

Section H: Discretionary fee credits and refunds

- H1. You may apply for a discretionary fee credit, over and above any standard fee credit that you may be entitled to, if you have deferred a module due to extenuating personal circumstances and can provide evidence of meeting the conditions approved by The Open University Senate in [Appendix 2](#).
- H2. If you have deferred your module and feel that you may be eligible to apply for a discretionary fee credit please contact your [Student Support Team](#) for advice on how to apply.
- H3. An application for a discretionary fee credit or refund must be submitted within 13 months of the Module Start Date of the module you have deferred from.
- H4. A discretionary fee credit may be awarded for up to 100% of the fee paid for the module that you have deferred from and/or extend the period for which a fee credit will remain available. The maximum period it may be extended to is 25 months after the start date of the module that you deferred. These maximum limits will only apply in exceptional circumstances.
- H5. An application for a discretionary fee refund can only be considered under the following conditions:
- The death of a registered student;
 - Serious maladministration on the part of The Open University as a result of which you do not wish to continue studying with us;
 - Unforeseen prolonged and serious illness of you or a close family member as the result of which you are unable to return to study within 25 months of the start date of the module you have deferred from.
- H6. Applications for discretionary fee credits or refunds must be submitted to your [Student Support Team](#). Your case will be reviewed by a Senior Manager or their delegated authority and the outcome will be communicated to you in writing within 10

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working days, together with guidance on how to appeal in the event that your application is unsuccessful.

- H7. Exceptional awards for cases which fall outside of the normal criteria for consideration may be agreed by the Vice-Chancellor's Delegate.

Section I: Fee Refunds and Fee Credits for resits and resubmissions

- I1. If you have been offered and have registered for a resit or resubmission that you no longer wish to undertake, you should contact your [Student Support Team](#).
- I2. If you have paid a fee for your resit or resubmission, you will be entitled to a full refund of your resit or resubmission fee if you withdraw from that resit or resubmission on or before the final date given in Table 6 for the presentation on which you are registered.
- I3. You are not entitled to any Fee Refund or Fee Credit if you withdraw after that date.

Table 6. Refund cut off dates for withdrawals from resits and resubmissions

Presentation code*	Resit exam date or EMA resubmission date	Final Date
2019M	1 September 2018 to 31 October 2020	31 July 2019
2020P	1 December 2018 to 31 January 2020	30 November 2019
2020L	1 February 2019 to 30 April 2020	28 February 2020
2020R	1 May 2019 to 15 June 2020	30 April 2020
2020N	16 June 2019 to 31 July 2020	31 May 2020

* The presentation code is stated in the letter confirming your registration for the resit or resubmission.

Section J: Additional costs

- J1. There may be extra costs in addition to the tuition fee, such as a laptop, travel to tutorials, set books and internet access. If you are on a low income you might be eligible for help with some of these costs after you start studying. Please contact your [Student Support Team](#) for further information.
- J2. If you wish to sit an examination at a non-established examination centre (usually outside Europe) you may be liable to pay an additional international examination fee for any module that has an examination, including resits.

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- J3. Postgraduate students taking resit exams, postponed resit exams, or re-submitting End-of-Module Assessments may need to pay a resit/resubmission fee. Please contact your [Student Support Team](#) for further information.
- J4. If you have registered for a residential school module or a module which includes an embedded residential school you are liable for any additional expenses that you may incur in connection with your attendance at that residential school. The Open University will not reimburse any such expenses.

Glossary of terms

14th day of your module

is counted as 14 days from the module start date, including that first day of the module. For example, if a module began on 1 October, the 14th day would be 14 October.

Academic Year

begins on 1 August each calendar year and ends on 31 July.

Agreed Overseas Territories

Anguilla, Aruba, Bermuda, British Antarctic Territory, British Indian Ocean Territory, British Virgin Islands, Cayman Islands, Falkland Islands, Faroe Islands, French Polynesia, French Southern and Antarctic Territories, Greenland, Mayotte, Montserrat, Netherlands Antilles (Bonaire, Curaçao, Saba, Sint Eustatius and Sint Maarten), Pitcairn, Henderson, Ducie and Oeno Islands, South Georgia and the South Sandwich Islands, St Bathelémy, St Helena and Dependencies (Ascension Island and Tristan da Cunha), St Pierre et Miquelon, Territory of New Caledonia and Dependencies, Turks and Caicos Islands, Wallis and Fortuna.

Declared qualification

is a postgraduate qualification that your study is being counted towards.

Devolved UK Nation

refers to Scotland, Wales and Northern Ireland.

European Economic Area (EEA) countries

Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Republic of Ireland, Romania, Slovakia, Slovenia, Spain, Sweden and United Kingdom (excluding Channel Islands and Isle of Man).

Fee Liability

is the requirement for you to pay your tuition fees to The Open University.

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Fee Credit

is an amount of money that is awarded by The Open University that can be offset against the fee of a future presentation module.

Final deferral date (FDD)

is the last working day before you sit the examination or submit the end- of-module assessment (EMA) or for modules which do not have an end of module assessment, the last working day before the submission deadline for the final piece of assessed work.

Home Address

is where you are ordinarily and lawfully resident.

Home Fee

refers to the fee applicable in England, Wales, Scotland or Northern Ireland.

Local Education Centre

is the place that administers your study when you are registered under a Partnership Agreement with another education provider.

Module Start Date

is the day that your module officially begins, as detailed on the registration confirmation.

Non-established Examination Centre

is an exam centre that The Open University arranges for you in a non-UK location on an exceptional basis and by request, but is not usually or routinely used by Open University students to sit exams.

Partnership Agreement

is an agreement between The Open University and another educational provider to provide joint services.

Registration

is the process by which you become a student of The Open University. Subject to these regulations you may register for a module or for a qualification. To register you need to agree to the [Conditions of Registration](#), signalling your intention to study one or more modules or qualifications, and make or arrange payment for your studies.

Registration confirmation

is the written communication which outlines what you have registered to study, as well as providing a summary of the conditions of that registration.

Registration confirmation (funding)

Is the process by which we confirm your participation in your study to allow maintenance funding to be released to you by the funding body.

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Seasonal Academic Year

is calculated from when you first study towards your qualification and ensures that you can access a full year of funding support, regardless of when you begin.

Settled Status

means you are normally and lawfully resident in the UK by choice without any immigration restriction on the length of your stay. Please note that some non-UK nationals without time limits on their stay are not deemed to be settled in the UK e.g. diplomats, visiting armed forces

Temporarily Absent

is where you are not resident in your normal country of residence for a fixed period of time. A temporary absence from the UK will be reviewed in the context of the duration of the absence, with decisions on whether the absence affects your status as “ordinarily and lawfully resident in the UK” being made on a case by case basis. The duration and purpose of the absence will be taken into account but may not be the only factor evaluated.

UK Funding Authority

refers to Student Finance England (SFE), Student Finance Wales (SFW), Student Finance Northern Ireland (SFNI) or the Student Awards Agency for Scotland (SAAS).

Vice-Chancellor’s Delegate

is a senior member of staff that the Vice-Chancellor has nominated to make decisions.

Further clarification

If you have any queries around the content provided within this document and how to interpret it, please contact your [Student Support Team](#).

If you have any comments about this policy document and how it might be improved, please submit these to SPR-Policy-Team@open.ac.uk.

Alternative format

If you require this document in an alternative format, please contact the Student Support Team via <http://www.open.ac.uk/contact/> (phone +44 (0)300 303 5303).

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Appendix 1 – Residency criteria and fee areas

Ap1 1. Introduction

Ap1 1.1. The Open University may charge different fees for postgraduate students with a Home Address in any of the following territories or groups of territories:

- UK – England, Northern Ireland, Scotland, Wales
- The Republic of Ireland
- Worldwide - All other territories outside the UK and Republic of Ireland

Ap1 1.2. The territory which applies to you is based on your Home Address and not a temporary or work address.

Ap1 1.3. We may perform checks to establish your home address and you may be required to send in relevant documentation to support your claim that you are liable for any particular fee. Acceptable documentation will include copies of driving licences, passports, visa, refugee or asylum seeker documentation, national identity cards or other official documentation from the Home Office (or their Agent).

Ap1 2. Eligibility for UK fees

Ap1 2.1. UK Nationals

Ap1 2.1.1 You are liable to pay a UK fee if you are 'settled' in the UK on the first day of the academic year of your module, and you have been ordinarily and lawfully resident in the UK for the three years prior to the first day of the academic year of your module.

Ap1 2.1.2 If you are 'temporarily absent' from the UK and either you or a relevant family member are temporarily working outside the UK, you will be classified as ordinarily and lawfully resident in the UK and therefore eligible to pay a UK fee, provided you were settled in the UK (excluding Channel Islands and Isle of Man) for the three years immediately prior to being temporarily absent from the UK.

Ap1 2.1.3 If you are ordinarily and lawfully resident in the Channel Islands or the Isle of Man, you are not eligible to pay a UK fee.

Ap1 2.2. Members of the British Armed Forces and UK Government employees working overseas

Ap1 2.2.1 If you are currently resident outside the UK and you are a UK national who is a serving member of the British Armed Forces entitled to use a British Forces Post Office (BFPO) address, you are liable for the relevant fee based on your place of ordinary and lawful residence within the UK.

Ap1 2.2.2 If you are ordinarily and lawfully resident in one of the devolved UK nations you may need to provide us with evidence in support of your application for a devolved UK

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nation fee. Evidence can be in the form of a Council Tax bill, passport or driving licence.

Ap1 2.2.3 Anyone who is a family member of someone currently serving in the British Armed Forces who is entitled to use a BFPO address, a non-UK national currently serving in the British Armed Forces, someone working for another British Government Organisation, such as the Foreign & Commonwealth Office, or a family member of such a person, will need to provide us with details of their family relationship where relevant, their nationality, country of permanent residence, when they were last in the UK and reasons for absence from the UK.

Ap1 2.3. European Economic Area (EEA), Agreed Overseas Territory or Swiss nationals

Ap1 2.3.1 You are eligible to pay a UK fee if:

- a) you are an EU/EEA/Swiss national; and
- b) you are ordinarily and lawfully resident in the UK; and
- c) you will be resident in the UK on the first day of the academic year of your module; and
- d) you have been ordinarily and lawfully resident in the European Economic Area (EEA), Switzerland or an Agreed Overseas Territory for at least the three years prior to the first day of the academic year of your module; and
- e) If you are a Swiss/non-EU EEA national, you also need to be a worker/migrant worker.

Ap1 2.4. Relevant family members of EU/EEA/Swiss nationals

Ap1 2.4.1 You are a relevant family member of an EU/EEA national if you are one of the following:

- a) Spouse or civil partner;
- b) Direct descendant who is under 21 years, of an EU/EEA national or national's spouse/civil partner e.g. child/grandchild. Those who are 21 years or over will need to provide evidence of dependency;
- c) Dependent direct ascendant of a non-UK national who is a self-sufficient person in the UK e.g. parent/grandparent.

Ap1 2.4.2 You are a relevant family member of a Swiss national if you are one of the following:

- a) Spouse or civil partner;
- b) Child.

Ap1 2.4.3 You will be eligible to pay a UK fee as long as the person on whom you are claiming dependency is ordinarily and lawfully resident in the UK and is resident in the UK on the first day of the academic year of the module and you;

- a) are ordinarily and lawfully resident in the UK;

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- b) will be resident in the UK on the first day of the academic year of your module, have been resident in the European Economic Area (EEA), Switzerland or an Agreed Overseas Territory for the three years prior to the first day of the academic year of your module;

Ap1 2.4.4 If you are studying in England or Northern Ireland, you do not need to have been resident in the European Economic Area (EEA), Switzerland or an Agreed Overseas Territory for the last three years, providing your “relevant family member” is:

- a) either a non-UK EU national who is resident in the UK as a self-sufficient person or a student; or
- b) is a UK national who has exercised a right of residence in another EU country, for more than three months, as a self-sufficient person, a student or a worker; and
- c) has been ordinarily and lawfully resident in the EEA, Switzerland or an Agreed Overseas Territory for the three years prior to the first day of the academic year of your module.

Ap1 2.5. Nationals of areas not mentioned above

Ap1 2.5.1 If you are not a national of any of the above mentioned territories then you will be eligible to pay a UK fee if:

- a) you have been granted 'indefinite leave to remain' in the UK (i.e. not on a temporary visa); and
- b) you have been ordinarily and lawfully resident in the UK for at least three years prior to the first day of the academic year of the module; and
- c) you will be ordinarily and lawfully resident in the UK on the first day of the academic year of your module.

Ap1 2.5.2 Please note that if you have applied for asylum and your case has been approved by the Home Office so that you have been granted refugee status or Humanitarian Protection, you will be eligible to pay a UK fee whether you have been given limited or indefinite leave to remain.

Ap1 2.5.3 You do not also need to have been resident in the UK for three years prior to the first day of the academic year of the module. If you are resident in Wales this also includes Discretionary Leave. If you are resident in Northern Ireland or Scotland it includes any kind of leave granted as a result of an asylum application.

Ap1 2.5.4 Asylum seekers who do not meet these criteria should contact our [Student Support Team](#) for advice.

Ap1 2.5.5 If you are not sure if you are eligible to pay UK fees, contact our [Student Support Team](#) for advice.

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Ap1 3. If you are not eligible for UK fees

Ap1 3.1. Your fee eligibility will be determined by where you are resident on the first day of the relevant academic year of your module:

- a) If you are resident in the UK but you are not eligible for a UK nation fee you will be liable for the EU fee;
- b) If you are resident in the Republic of Ireland you will be liable for the Republic of Ireland fee;
- c) If you are resident in the European Approved Study Area you will be liable for the EU fee;
- d) If you are resident in any other area in which you are permitted to register to study with The Open University, you will be liable for the standard fee;
- e) If you are a 'locally engaged' member of staff, of any nationality, working at a UK Armed Forces base, British Embassy or Consulate in a non-UK territory you are liable to pay the relevant fee for that territory. To ensure that we can provide you with sufficient support etc. to enable successful completion of your studies, you should use a non-BFPO address as your 'home address' and study modules that are available within your country of residence.

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Appendix 2 – Conditions for Discretionary Fee Credits and Refunds approved by the University Senate

Table 7. Conditions approved by University Senate

Criterion	Conditions and notes	Supporting evidence required
1. Death of a close family member, partner or dependent.	A close family member is defined as someone on whom you are dependent (emotionally or financially) or who was dependent on you.	Hard copy or email notification followed by documentary evidence, e.g. certified copy of death certificate (an exception may be made if the death occurred within six weeks before application).
2. An unforeseen prolonged incapacity of yourself or a close family member due to serious illness, accident or medical condition	If you were aware before the module start date of the medical problems, the condition needs to have worsened or deteriorated since then, i.e. it could not have been anticipated at the outset of the module that the illness or condition would have adversely impacted on your study.	Hard copy or email notification followed by documentary evidence, e.g. certificate, letter or medical statement from GP or consultant confirming the situation. (The period of the illness needs to have a bearing on the timing of the withdrawal).
3. Disability	The reasonable adjustments made by The Open University have not enabled you to study effectively; or The impact of a disability on your studies has been more severe than anticipated; or There has been an increase in your disability/disabilities affecting your studies since the module start date.	Corroborative evidence from Open University records, e.g. tutor or Student Support Team. Certificate, letter or medical statement from GP, consultant, non-medical helper or a support person or organisation confirming the situation.
4. An unforeseen prolonged incapacity of yourself due to pregnancy or maternity/paternity	If you were aware of the pregnancy before the module start date, the impact on your study of the pregnancy or maternity/paternity must be greater than might reasonably have been anticipated.	Hard copy or email notification followed by documentary evidence, e.g. certificate, letter or medical statement from GP or consultant confirming the situation.

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Criterion	Conditions and notes	Supporting evidence required
5. An unforeseen prolonged incapacity of yourself due to gender reassignment	If you had undertaken gender reassignment before the module start date or by then you were aware of the arrangements to do so after that date, the impact on your study must be greater than might reasonably have been anticipated.	Hard copy or email notification followed by documentary evidence, e.g. certificate, letter or medical statement from GP or consultant confirming the situation.
6. An unforeseen change in employment circumstances with the effect that it is not reasonably possible to continue to study due to the extreme nature of the work, poor communications or the absence of study facilities.	Other than in the case of a posting of a member of the British armed forces, circumstances which may occur in the course of normal working life such as change of job, relocation, an increased workload or reasonable travel requirements will not be considered.	Hard copy or email notification followed by documentary evidence, e.g. letter or email from your employer or commanding officer.
7. Maladministration on the part of The Open University.	Action or inaction which could be classed as maladministration on the part of the Open University and which has affected your academic progress. This does not extend to circumstances that are beyond our control.	Any relevant evidence to support your application, e.g. record of student contact.
8. Other exceptional circumstances of a serious nature beyond your control.	Circumstances beyond your control that significantly reduced the time available for study over a sustained period.	Supporting evidence, e.g. report from emergency services, social services, police or counsellor.
9. Caring responsibilities	If your caring responsibilities were in place before your module start date, the impact on your study must be greater than might reasonably have been anticipated	Hard copy or email notification followed by documentary evidence. E.g. Letter or medical statement from GP, consultant, non-medical helper or a support person or organisation confirming the situation.

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Appendix 3 – Postgraduate Loans in England and Wales (excluding qualifications in Wales which begin after 1 September 2019)

Ap3 1. Course Eligibility Criteria

- Ap3 1.1. You must be studying towards a full Masters qualification in any subject. Masters qualifications for which the loan will be available are those at FHEQ Level 7, typically attracting 180 credits and culminating in a postgraduate Masters qualification, for example MA, MSc, MRes, MBA, MEd and LLM.
- Ap3 1.2. Masters qualifications which start after 1 August 2016 in England or 1 August 2017 in Wales are eligible for the loan. Previous Open University credit, accreditation of prior learning and/or credit transfer cannot be included as part of a loan eligible Masters qualification, unless achieved after the applicable start dates.
- Ap3 1.3. Open University Masters qualifications which can be completed within 3 years are eligible.

Ap3 2. Personal Eligibility Criteria

- Ap3 2.1. You must be ordinarily resident in England or Wales to be eligible for the loans in these nations.
- Ap3 2.2. If you are a UK national who moves to England or Wales from either Scotland or Northern Ireland solely for the purposes of study you will not be eligible. You will be required to submit three years' address history to confirm your place of ordinary residence.
- Ap3 2.3. If you are an EU national you will be eligible, subject to confirmation that you have been resident in the EEA for the three years prior to the first day of the academic year in which the qualification begins and you will be resident in England or Wales on the first day of your qualification.
- Ap3 2.4. If you already hold a Masters qualification, an equivalent level qualification or a higher level qualification you will not be eligible for the loans. Qualifications obtained outside the UK will be taken into account in determining your eligibility for the loan.

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Ap3 2.5. If you are aged 60 or over on the first day of the seasonal academic year (as calculated in [Section G, Table 1](#)) in which the qualification begins, you will not be eligible for the loan.

Ap3 3. Administration of the loan

Ap3 3.1. You must submit your application directly to Student Finance England or Student Finance Wales. The loan will be issued by the Student Loans Company, directly to you.

Ap3 3.2. You will receive the loan in instalments over the duration of your study, subject to your ongoing participation in study.

Ap3 3.3. We are required to confirm your registration is complete and that you are participating in study before Postgraduate Loan instalments are released. This means that all relevant paperwork must be returned to us together with full payment of any module fee(s) before a Postgraduate Loan instalment can be paid to you.

Ap3 3.4. Your registration will be confirmed to the Student Loans Company once we have been able to confirm you are participating on your course. This will be no earlier than the first day of your module.

Ap3 3.5. Payments will be made in three instalments across the academic year. The first loan instalment will be released after we have confirmed your registration as per paragraph Ap3 3.4. Subsequent payments will be released by the Student Loans Company approximately 14 days after the start of terms 2 and 3.

Ap3 3.6. You will not be entitled to receive subsequent loan instalments if you withdraw from study or change to a course which is not eligible for the loan. We are expected to inform the Student Loans Company if you are no longer participating in your studies or you change qualification.

Ap3 3.7. Approved study breaks may be permitted during which your payments would be suspended until the return to study.

Ap3 3.8. You will be liable for the loan and will be expected to make repayments if you withdraw from, or do not complete, your course, in accordance with The Education (Postgraduate Masters Degree Loans) Regulations 2016 and Student Loans Company requirements.

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Appendix 4 – Postgraduate Loans in Northern Ireland

Ap4 1. Course Eligibility Criteria

- Ap4 1.1. Postgraduate Tuition Fee Loans are available for Postgraduate Certificates, Postgraduate Diplomas, taught Masters, Research Masters and Masters that are a mixture of taught and research. PhDs, Integrated Masters and PGCEs are not eligible.
- Ap4 1.2. Qualifications may have a maximum duration of three years. Qualifications of less than one academic year's duration are eligible for postgraduate support.
- Ap4 1.3. Postgraduate loans are available to students starting qualifications in Northern Ireland after 1 August 2017.
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Ap4 2. Personal Eligibility Criteria

- Ap4 2.1. You must be ordinarily resident in Northern Ireland to be eligible for a Postgraduate Loan.
- Ap4 2.2. If you are a UK national who moves to Northern Ireland from within the UK solely for the purposes of study you will not be eligible for a Postgraduate loan. You will be required to submit three years' address history to confirm your place of ordinary residence.
- Ap4 2.3. If you are an EU national you will be eligible for a Postgraduate loan, subject to confirmation that you have been resident in the EEA for the three years prior to the first day of the academic year in which the qualification begins and you will be resident in Northern Ireland on the first day of your qualification.
- Ap4 2.4. If you already hold a postgraduate qualification, an equivalent level qualification or a higher level qualification you will be eligible for the loan, subject to meeting the other standard eligibility criteria.
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Ap4 3. Administration of the loan

- Ap4 3.1. You will be entitled to either the maximum amount of £5,500 or the amount of your tuition fees for the qualification, whichever is lower. Loans will be paid directly to The Open University.
- Ap4 3.2. If you are studying a course of up to 1 academic year in duration you will be eligible for a tuition fee loan of up to £5,500.

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- Ap4 3.3. If you are studying your qualification over two academic years then you are eligible for a tuition fee loan of up to £2,750 each year.
- Ap4 3.4. If you are studying your qualification over three academic years then you are eligible for a maximum tuition fee loan of up to £1,833 a year (year three is £1,834).
- Ap4 3.5. Where the loan amount for the year will be insufficient to cover your module fees in full you will be required to pay any shortfall to the fee in full at the point of registration.
- Ap4 3.6. You may transfer to an alternative, or higher level, qualification at The Open University or a different institution but the maximum Postgraduate loan will remain capped at £5,500.
- Ap4 3.7. If you receive a postgraduate loan and complete, fail or withdraw from the qualification for which it was received, you will not be eligible for a further loan even if you have not received the full possible allocation of £5,500.
- Ap4 3.8. You may suspend your studies part way through the course on one or more occasions up to a maximum of two years in aggregate.
- Ap4 3.9. You will be liable for the loan and will be expected to make repayments if you withdraw from, or do not complete, your course, in accordance with The Education (Student Loans)(Repayment)(Amendment) Regulations (Northern Ireland 2017) and SLC requirements.

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