

**Employee Information Form / Starter Checklist**

**Instructions for Employees**

As a new employee your employer 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.

**This form is for new employees. Please complete in BLOCK CAPITALS.**

|  |  |
| --- | --- |
| **Name of Organisation / Company:** |  |

**Employees Personal Details**

|  |  |
| --- | --- |
| **Forename(s) in full:** |  |
| **Surname:** |  |
| **What is your Sex?** (As shown on your birth certificate or gender recognition certificate) |  |
| **Home Address:** |  |
| **Postcode:** |  |
| **Date of Birth:** |  |
| **E-mail Address:** |  |
| **National Insurance Number:** |  | **Employment Start Date:** |  |
| **Job Title/Description:** |  |
| **Normal Working Hours** (e.g. 35, 21)**:** |  | **Normal Working Days** (e.g. Mon – Fri)**:** |  |
| **Full-Time Annual Pay:** |  | **Pro-Rata Pay – Per Annum:** |  | **Hourly Rate:** |  |
| **Pension Eligibility:** |

**Bank Details** (to be completed if salary is being paid by Bradford Community Payroll)

|  |  |
| --- | --- |
| **Bank/Building Society Name and Branch:** |  |
| **Name on Account:** |  | **Sort Code:** |  | **Account Number:** |  |

**Employee Statement**

These questions will help you to choose the statement that matches your circumstances. The statement you choose helps us to apply the correct tax code.

**Do you have another job?**

YesPut an ‘X’ in the statement C box below

NoPlease go to the next question

**Do you receive payments from a State, workplace or private pension?**

YesPut an ‘X’ in the statement C box below

NoPlease go to the next question

**Since 6April have you received payments from:**

* Another job which has ended

or any of the following taxable benefits

* Jobseeker’s Allowance (JSA)
* Employment and Support Allowance
* Incapacity Benefit

Yes Put an ‘X’ in the statement B box below

NoPut an ‘X’ in the statement A box below

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

|  |  |  |
| --- | --- | --- |
| **Statement A** | **Statement B** | **Statement C** |
| This is my first job since 6 April and since the 6 April I’ve not received payments from any of the following:* Jobseeker’s Allowance
* Employment and Support Allowance
* Incapacity Benefit
 | Since 6 April I have had another job but I do not have a P45. And/or since the 6 April I have received payments from any of the following:* Jobseeker’s Allowance
* Employment and Support Allowance
* Incapacity Benefit
 | I have another job and/or I am receipt of a State, workplace or private pension. |
| Statement A applies to me | Statement B applies to me | Statement C applies to me |
| **Key**Jobseeker’s Allowance (JSA) is an unemployment benefit which can be claimed while looking for workEmployment and Support Allowance (ESA) is a benefit which can be claimed if you have a disability or health condition that affects how much you can workIncapacity Benefit is help if you could not work because of an illness or disability before 31 January 2011.State Pension is a pension paid when you reach State Pension age.Workplace pension is a pension which was arranged by your employer and is being paid to you. Private pension is a pension arranged by you and is being paid to you.Please note that no other Government or HMRC paid benefits need to be considered when completing this form. |

**Student Loans**

**Do you have a student or postgraduate loan?**

Yes Please go to the next question

No Go straight to the declaration

**Do any of the following statements apply:**

* you’re still studying full-time on a course that your Student Loan relates to
* you completed or left your full-time course after the start of the current tax year, which started on 6 April
* you’re already making regular direct debit
repayments from your bank, as agreed
with the Student Loans Company

Yes Go straight to the declaration

No Please go to the next question

**To avoid repaying more than you need to,
tick the correct Student Loans that you have – use the guidance on the right to help you**

Please tick all that apply

Plan 1

Plan 2

Plan 4

|  |
| --- |
| **Types of Student Loan** |
| **You have Plan 1 if any of the following apply:*** you lived in Northern Ireland when you started

your course* you lived in England or Wales and started your course before 1 September 2012
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| **You have a Plan 2 if:*** You lived in England or Wales and started your course on or after 1 September 2012.
 |
| **You have a Plan 4 if:*** You lived in Scotland and applied through the Students Award Agency Scotland (SAAS) when you started your course.
 |
| **You have a Postgraduate Loan if any of the following apply:*** 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
 |

Postgraduate Loan (England and Wales only

**Declaration**

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

|  |  |  |  |
| --- | --- | --- | --- |
| **Signed:** |  | **Date:** |  |