

**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.**

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

**Employees Personal Details**

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| --- | --- | --- | --- |
| **Title:** (Mr, Mrs, Miss, Ms) |  | **Forename(s) in full:** |  |
| **Marital Status:**(Married, Single, Divorced etc.) |  | **Surname:** |  |
| **Home Address:** |  |
| **Postcode:** |  |
| **Date of Birth:** |  | **Male / Female:** |  |
| **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 being paid by Bradford Community Payroll)

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

**Employee Statement**

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

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| **A** |  | This is my first job since last 6 April and I have not been receiving taxable Jobseekers Allowance, Employment and Support Allowance, taxable Incapacity Benefit, State or Occupational Pension. |
| **B** |  | This is now my only job but since last 6 April I have had another job, or received taxable Jobseekers Allowance, Employment and Support Allowance or taxable incapacity Benefit. I do not receive a State or Occupational Pension. |
| **C** |  | As well as my new job, I have another job or receive a State or Occupational Pension. |

**Student Loan**

**Student Loan Plans**

You will have a Plan 1 Student Loan if:

* You lived in Scotland or Northern Ireland when you started your course (undergraduate or postgraduate)
* You live in England or Wales and started your course before 1 September 2012

You will have a Plan 2 Student Loan if:

* You lived in England or Wales and started your undergraduate course after 1 September 2012.
* Your loan is a part-time maintenance loan
* Your loan is an advanced learner loan
* Your loan is a Postgraduate Healthcare loan

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| --- | --- | --- | --- |
| **1** | **Do you have a Student Loan which is not fully repaid?** | **Yes / No** (please circle) | If yes, go to question 2, if no, go to question 4. |
| **2** | **Are you repaying your Student Loan direct to the Student Loans Company by agreed monthly payments?** | **Yes / No** (please circle) | If yes, go to question 4, if no, go to question 3. |
| **3** | **What type of Student Loan do you have?** | **Plan 1 / Plan 2** (please circle) |
| **4** | **Did you finish your studies before the last 6 April?** | **Yes / No** (please circle) |

For further guidance about repaying Student Loans go to:[**www.gov.uk/new-employee/student-loans**](http://www.gov.uk/new-employee/student-loans)

**Postgraduate Loan**

For more guidance about funding and repaying go to *www.gov.uk/funding-for-postgraduate-study*

For more guidance for employers go to

*www.gov.uk/guidance/special-rules-for-student-loans*

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| **5** | **Do you have a postgraduate Loan which is not fully repaid?** | **Yes / No** (please circle) | If yes, go to question 6, if no, go to the declaration |
| You’ll have a Postgraduate Loan if: * 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
 |
| **6** | **Did you complete or leave your postgraduate studies before 6th of April?** | **Yes / No** (please circle) | If yes, go to question 7, if no, go to declaration |
| **7** | **Are you repaying your postgraduate loan direct to the student loans Company by direct debit?** | **Yes/No****Go to declaration** |

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