**Instructions for employers**

This Starter Checklist can be used to gather information about your new employee. You can use this information to help fill in your first Full Payment Submission (FPS) for this employee. You need to keep the information recorded on the Starter Checklist record for the current and previous 3 tax years. Do not send this form to HMRC.

**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. Do not send this form to HMRC.

**Employee’s personal details**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **1** | Last Name |  | **5** | Home address |
|  |   |  |  |   |
|  |  |  |  |   |
| **2** | First name(s) Do not enter initials or shortened names |  |  |   |
|  |   |  |  | Postcode |
|  |   |  |  | Country |
|  |  |  |  |  |
| **3** | Are you male or female? |  | **6** | National Insurance number (if Known) |
|  | Male [ ]  Female [ ]   |  |  |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |  |

 |
|  |  |  |  |  |
| **4** | Date of birth (DD MM YYYY) |  | **7** | Employment Start Date (DD MM YYYY) |
|  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |

 |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |

 |
|  |  |  |  |  |

**Employee statement**

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

|  |  |  |
| --- | --- | --- |
| **A** | [ ]  | This is my first job since 6 April and I’ve not been receiving taxable Jobseeker’s Allowance, Employment and Support Allowance, taxable Incapacity Benefit, State or Occupational Pension. |
| **B** | [ ]  | This is now my only job but since 6 April I’ve had another job, or received taxable Jobseeker’s 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. |

Please turn over >

|  |  |  |
| --- | --- | --- |
| **Student Loan** |  | **Postgraduate Loan** |
| For more guidance about repaying go to www.gov.uk/repaying-your-student-loan |  | For more guidance about funding and repaying go towww.gov.uk/funding-for-postgraduate-study |
|  |  | For more guidance for employers go to www.gov.uk/guidance/special-rules-for-student-loans |
|  |  |  |
| **9 Do you have one of the Student Loan Plans described below which is not fully repaid?**Yes [ ]  If Yes, go to question 10No [ ]  If No, go to question 13 |  | **13 Do you have a Postgraduate Loan which is not fully repaid?**Yes [ ]  If Yes, go to question 14No [ ]  If No, go to the Declaration |
|  |  |  |
| **10 Did you complete or leave your studies before6th April?**Yes [ ]  If Yes, go to question 11No [ ]  If No, go to question 13 |  | 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
 |
|  |  |  |
| **11 Are you repaying your Student Loan directly to the Student Loans Company by direct debit?**Yes [ ]  If Yes, go to question 13No [ ]  If No, go to question 12 |  | **14 Did you complete or leave your Postgraduate studies before 6th April?**Yes [ ]  If Yes, go to question 15No [ ]  If No, go to the Declaration |
|  |  |  |
| **12 What type of Student Loan do you have?**Plan 1 [ ]  Plan 2 [ ]  Both [ ]  |  | **15 Are you repaying your Postgraduate Loan direct to the Student Loans Company by direct debit?**Yes [ ] No [ ]  |
| **Student Loan Plans** |  |  |
| You’ll have a Plan 1 Student Loan if:* you lived in Scotland or Northern Ireland when you started your course (undergraduate or postgraduate)
* you lived in England or Wales and started your undergraduate course before 1 September 2012

You’ll have a Plan 2 Student Loan if:* you lived in England or Wales and started your undergraduate course on or 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
 |  | Go to the Declaration |

**Declaration**

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

|  |  |  |
| --- | --- | --- |
| **Signature** |  | **Full Name** |
|  |  |  |
|   |  |   |
|  |  |
|  |  | **Date (DD MM YY)** |
|  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |

 |