

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 you can print it and send it or give it to your employer.

Do not send this form to HMRC.

Employee's personal details

Last name or family name

First name(s)

Are you male or female?

Male Female

Date of birth

Address

Is this address in the UK?

Yes No

Line 1

Line 2

Line 3 (optional)

Postcode

Do you have a National Insurance number?

Yes No

National Insurance number

Employment start date

Employee statement

Which of the following statements applies to you

- A - This is my first job since last 6 April and I have 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 last 6 April I have 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.

Student Loan

For more guidance about repaying go to www.gov.uk/repaying-your-student-loan

9 - Do you have one of the Student Loan Plans described below which is not fully repaid?

Yes If Yes, go to question 10

No If No, go to question 13

10 - Did you complete or leave your studies before 6th April?

Yes If Yes, go to question 11

No If No, go to question 13

11 - Are you repaying your Student Loan directly to the Student Loans Company by direct debit?

Yes If Yes, go to question 13

No If No, go to question 12

12 - What type of Student Loan do you have?

Plan 1 Plan 2 Both

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

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

13 - Do you have a Postgraduate Loan which is not fully repaid?

Yes If Yes, go to question 14

No 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

14 - Did you complete or leave your Postgraduate studies before 6th April?

Yes If Yes, go to question 15

No If No, go to the Declaration

15 - Are you repaying your Postgraduate Loan direct to the Student Loans Company by direct debit?
Yes No

Go to the Declaration

Declaration

I confirm that the information I have given is correct

Signature

Date