HM Revenue & Customs

Starter checklist

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 three tax years.
Do not send this form to HM Revenue and Customs (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**

2 **First name(s)**
Do not enter initials or shortened names such as Jim for James or Liz for Elizabeth

3 **Are you male or female?**

Male ☐ Female ☐

4 **Date of birth** DD MM YYYY

5 **Home address**

Postcode

Country

6 **National Insurance number** (if known)

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 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.

Please turn over ›

Student Loan

9 **Do you have a Student Loan which is not fully repaid?**

Yes ☐ If yes, go to question 10

No ☐ If no, go to question 12

10 **Are you repaying your Student Loan direct to the Student Loans Company by agreed monthly payments?**

Yes ☐ If yes, go to question 12

No ☐ If no, go to question 11

Student Loan Plans

You will have a Plan 1 Student Loan if:

- You lived in Scotland or Northern Ireland when you started your course, or
- You lived in England or Wales and started your course before September 2012

You will have a Plan 2 Student Loan if you lived in England or Wales and started your course on or after 1 September 2012.

11 **What type of Student Loan do you have?**

Plan 1 ☐

Plan 2 ☐

12 **Did you finish your studies before the last 6 April?**

Yes ☐

No ☐

For further guidance about repaying Student Loans go to **www.gov.uk/new-employee/student-loans**

Signature

Name

Date DD MM YYYY