

New Starter Checklist

Part 1 Employee details

Employee: complete pages 1 to 3 and sign the declaration on page 3. Employer: complete and sign page 4. Return the completed form and any P45 securely to the employer for onward submission to CAG before the first payroll. Do not send this form to HMRC.

Employer business name

Personal information

Surname

Full first names Use your full legal names rather than initials or nicknames

Date of birth DD / MM / YYYY

Gender for HMRC payroll records: ☐ Male ☐ Female

Use the sex shown on your birth certificate or gender recognition certificate.

Home address

Postcode and country

National Insurance number

Contact details

Contact phone number

Email address for payslips Please write clearly

Your employer and CAG will use these details to administer your employment and payroll, including providing payslips. Return this form using the secure method agreed with your employer. Employers must retain starter information for this tax year and the next three tax years.

Part 1 Employee details continuedEmployee name: **Employment and bank details**

Employment start date DD / MM / YYYY

P45 provided: ☐ Yes, attached ☐ No ☐ To follow

Bank or building society name

Account holder name

Sort code

Account number

Building society roll number If applicable

Employee tax statement

Complete this section if you have no P45, or if your employer asks you to. Tick one statement only. The tax year begins on 6 April. Use the questions below to choose the correct statement.

1. Do you currently have another job? ☐ Yes → choose C ☐ No → answer 2

2. Do you receive a State, workplace or private pension?

☐ Yes → choose C ☐ No → answer 3

3. Since 6 April, have you been paid from a job that has ended, or received Jobseeker's Allowance, Employment and Support Allowance or Incapacity Benefit?

☐ Yes → choose B ☐ No → choose A☐ **Statement A**

This is my first job since 6 April. Since that date I have not received Jobseeker's Allowance, Employment and Support Allowance or Incapacity Benefit.

☐ **Statement B**

Since 6 April I have had another job but do not have a P45, and/or I have received Jobseeker's Allowance, Employment and Support Allowance or Incapacity Benefit.

☐ **Statement C**

I currently have another job and/or receive a State, workplace or private pension.

Only the benefits named above affect this selection. If you are unsure which statement applies, speak to your employer before signing.

Part 1 Loans and employee declaration

Employee name:

Student and postgraduate loans

Complete this section even if you have provided a P45.

1. Do you have a student or postgraduate loan?

☐ No → go to the declaration below ☐ Yes → answer question 2

2. Does any of the following apply?

- You are still studying on the course to which the loan relates.
- You completed or left the course after 6 April in the current tax year.
- You have repaid the loan in full.
- You pay the Student Loans Company by Direct Debit to manage the final repayments of your loan.

☐ Yes → go to the declaration below ☐ No → answer question 3

3. Which repayment plan applies?

☐ Plan 1 ☐ Plan 2 ☐ Plan 4 ☐ Plan 5

☐ Postgraduate loan

Select only one student loan plan. You may also select Postgraduate loan if you repay both. Check the plan you are due to repay in your Student Loans Company account before choosing.

Check your loan details: www.gov.uk/sign-in-to-manage-your-student-loan-balance

If you have several loans with different circumstances and cannot answer clearly, give your employer the repayment details for each loan before payroll is processed.

Employee declaration

I confirm that the information I have provided in Part 1 is accurate and complete to the best of my knowledge. I have checked my contact and bank details and will tell my employer promptly if any of these details change.

Employee full name

Employee signature

Date signed DD / MM / YYYY

Give all completed pages to your employer, together with your P45 if available. This form is intended for employees who normally live and work in the UK. Tell your employer if you have been seconded to the UK by an overseas employer so the appropriate HMRC information can be collected.

Part 2 Employer instructions

Employer: complete this page after reviewing the employee's information on pages 1 to 3.

Employer business name and employee full name

Job title

Employment start date

Hours and gross pay

Contracted paid hours per week Enter variable or zero hours where applicable

Working days or pattern Exclude unpaid breaks from paid hours

Payment frequency: ☐ Weekly ☐ Fortnightly ☐ 4-weekly ☐ Monthly

Pay basis: ☐ Monthly salaried pay ☐ Hourly pay

Actual annual gross salary £

OR gross hourly rate £

For salaried staff, enter the actual annual salary payable for their contracted hours, including any agreed part-time reduction. Do not enter the full-time equivalent salary. Hourly pay can apply at any payment frequency.

First payday and normal payday

Overtime rate and any bonuses allowances or agreed deductions Write none if none

Employer checks

☐ Right to work verified before employment starts

Checked by and date checked

Check method and location of retained evidence

Follow-up check due date If applicable otherwise write not required

The employer must carry out the appropriate check and retain the supporting evidence. This tick box alone does not establish a right to work.

P45: ☐ Attached ☐ Not available ☐ To follow

☐ Employee declaration signed ☐ Pay terms confirmed

Employer authorisation

I confirm the employment and pay instructions above are correct and authorise CAG to use them to set up payroll. Any additional instructions, including pension arrangements or special employee status, are attached where relevant.

Completed by and position

Signature

Date signed