EDSTART

Starter Checklist

Tell your employer of your circumstances so that you do not pay too much or too little tax

Employee's personal details

1 **Last Name**

2 **First Names**

Do not enter initials or shortened names for example, Jim for James or Liz for Elizabeth

3 **What is your sex?**

As shown on your birth certificate or gender recognition certificate

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

8 **Personal Email Address**

Employee's bank details

1 **Name of Bank**

2 **Name on Account**

3 **Sort Code**

4 **Account Number**

Weekly Pattern

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	TOTAL
☐	☐	☐	☐	☐	☐	☐	

Salary Details

SALARY: £

HOURLY RATE: £

Employee statement

These questions will help you to choose the statement that matches your circumstances. The statement you choose helps your employer to apply the correct tax code.

1 **Do you have another job?**

Yes ☐ Put an 'X' in the statement C box below

No ☐

2 **Do you receive payments from a State, workplace or private pension?**

Yes ☐ Put an 'X' in the statement C box below

No ☐

3 **Since 6 April have you received payments from:**

- another job which has ended or any of the following taxable benefits
- Jobseeker's Allowance (JSA)
- Employment and Support Allowance (ESA)
- Incapacity Benefit

Yes ☐ Put an 'X' in the statement B box below

No ☐ Put an 'X' in the statement A box below

For more information about tax codes, go to www.gov.uk/tax-codes

Statement A ☐	**Statement B** ☐	**Statement C** ☐
Current personal allowance	Current personal allowance on a Week 1/Month 1 basis	Tax Code BR
Key This is my first job since 6 April and since the 6 April I have not received payments from any of the following: • Jobseeker's Allowance • Employment and Support Allowance • Incapacity Benefit	Key Since 6 April I have had another job but I do not have a P45. And/or since the 6 April I have received payments from any of the following: • Jobseeker's Allowance • Employment and Support Allowance • Incapacity Benefit	Key I have another job and/or I am in receipt of a State, workplace or private pension.

Key

Jobseeker's Allowance (JSA) is an unemployment benefit which can be claimed while looking for work.
Employment and Support Allowance (ESA) is a benefit which can be claimed if you have a disability or health condition that affects how much you can work.
Incapacity Benefit is help if you could not work because of an illness or disability before 31 January 2011. State Pension is a pension paid when you reach State Pension age.
Workplace pension is a pension which was arranged by your employer and is being paid to you.
Private pension is a pension arranged by you and is being paid to you.

Please note that no other Government or HMRC paid benefits need to be considered when completing this form.

Student loans

11 **Do you have a student or postgraduate loan?**

Yes ☐ Go to question 12

No ☐ Go straight to the Declaration

12 **Do any of the following statements apply:**

- you're still studying on a course that your student loan relates to
- you completed or left your course after the start of the current tax year, which started on 6 April
- you've already repaid your loan in full
- you're paying the Student Loans Company by Direct Debit from your bank to manage your end of loan repayments

Yes ☐

No ☐

Declaration

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

Full Name - In Capitals

Signature

Date DD MM YYYY