



Starter checklist

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.

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.

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

[illegible]

5 Home address

Postcode	
Country	

6 National Insurance number (if known)

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7 Employment start date DD MM YYYY

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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

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

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

10 What type of Student Loan do you have?

Plan 1 ☐ Plan 2 ☐ Both ☐

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

Yes ☐ If Yes, go to question 12

No ☐ If No, go to question 13

12 Are you repaying your Student Loan directly to the Student Loans Company by Direct Debit?

Yes ☐

No ☐

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 ☐

Signature

Full name

Date DD MM YYYY