

**Starter checklist**

# Instructions for employers - This Starter Checklist is used to gather information about a new employee. We use this information to help fill in our first Full Payment Submission (FPS) for an employee. We keep the information recorded on the Starter Checklist record for the current and previous 3 tax years*.*

# Instructions for employees – please complete and return via email to payroll@liverpool.ac.uk

As a new employee we need the information **before the 12th of the month of your first payday** to tell HMRC about you and help them use the correct tax code. Failure to do so could result in you possibly paying too much tax in your first few months of employment with us. This form can only be used in the first month we are paying you (HMRC instructions), so to avoid paying too much tax it should be submitted at the earliest opportunity. **If we do not receive the form in time to apply to your first payment, you can contact HMRC on 0300 200 3300 to discuss further.**

It’s important that you choose the correct statement. If you do not choose the correct statement you may pay too much or too little tax. For help filling in this form watch our short youtube video, go to: [www.youtube.com/user/HMRCgovuk](http://www.youtube.com/user/HMRCgovuk)

# Employee’s personal details

**Last name**

**1**

**First names**

**2**

Do not enter initials or shortened names such as Jim for James or Liz for Elizabeth

**Home address**

|  |
| --- |
|         |
|        |
|        |
|        |  Postcode |        |
| Country |       |

**National Insurance number** if known

**6**

**5**

**Are you male or female?**

**3**

Male [ ]  Female [ ]

**Employment start date** DD/MM/YYYY

**Date of birth** DD/MM/YYYY

**4**

**7**

# Employee statement

**Choose the statement that applies to you, either A, B or C, and tick the appropriate box.**

**8**

|  |  |  |
| --- | --- | --- |
| **Statement A** | **Statement B** | **Statement C** |
| Do not choose this statement if you’re in receipt of a State, Works or Private Pension.Choose this statement if the following applies.This is my first job since 6 April and since the 6 April I’ve not received payments from any of the following:* Jobseeker’s Allowance
* Employment and Support Allowance
* Incapacity Benefit
 | Do not choose this statement if you’re in receipt of a State, Works or Private Pension.Choose this statement if the following applies.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
 | Choose this statement if:* you have another job and/or
* you’re in receipt of a State, Works or Private Pension
 |
| Statement A applies to me [ ]  | Statement B applies to me [ ]   | Statement C applies to me [ ]  |

Starter checklist Page 1 HMRC 03/20

# Student Loan Postgraduate Loan

For more guidance about repaying, go to [www.gov.uk/repaying-your-student-loan](http://www.gov.uk/funding-for-postgraduate-study)

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

**9**

Yes [ ]  If Yes, go to question 10

No [ ]  If No, go to question 13

**Did you complete or leaveyour studies before 6th April?**

**10**

Yes [ ]  If Yes, go to question 11

No [ ]  If No, go to question 13

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

**11**

Yes [ ]  If Yes, go to question 13

No [ ]  If No, go to question 12

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

**12**

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

For more guidance about funding and repaying, go to [www.gov.uk/funding-for-postgraduate-study](http://www.gov.uk/funding-for-postgraduate-study)

For more guidance for employers, go to [www.gov.uk/guidance/special-rules-for-student-loans](http://www.gov.uk/guidance/special-rules-for-student-loans)

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

**13**

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

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

**14**

Yes [ ]  If Yes, go to question 15

No [ ]  If No, go to the Declaration

**Are you repaying your Postgraduate Loan direct to the Student Loans Company by direct debit?**

**15**

Yes [ ]

 No [ ]

Fill in the declaration.

# Declaration

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

**Signature Full name**

**Date DD/MM/YYYY**