



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 3 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.

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/hmrcgovuk

Employee's personal details

1 Last name

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

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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • Jobseeker's Allowance • Employment and Support Allowance • Incapacity Benefit 	Choose this statement if: <ul style="list-style-type: none"> • you have another job and/or • you're in receipt of a State, Works or Private Pension
Statement A applies to me <input type="checkbox"/>	Statement B applies to me <input type="checkbox"/>	Statement C applies to me <input type="checkbox"/>

9 Do you have a Student Loan or Postgraduate Loan for a course you completed or left before 6 April?

Please tick all that apply

Student Loan

Postgraduate loan (England and Wales only)

Neither - if you tick this box go straight to the Declaration

10 Which type of loan do you have?

Please tick all that apply

Plan 1

Plan 2

Plan 4

Postgraduate loan

To make sure you do not pay more than you need to, it's important to select the right plan and loan.

Please note

You do not have to pay back your Student or Postgraduate loan yet, if:

- you're still studying full time
- you completed your full time course after 6 April
- you have a pre-existing arrangement with Student Loans Company to repay your loan by direct debit

For more guidance about:

- the type of loan you have, go to www.slc.gov.uk/ORS
- student loans, go to www.gov.uk/guidance/special-rules-for-student-loans

Types of Student Loan

You have Plan 1 if any of the following apply:

- you lived in Northern Ireland when you started your course
- you lived in England or Wales and started your course before 1 September 2012

You have a Plan 2 if:

You lived in England or Wales and started your course on or after 1 September 2012.

You have a Plan 4 if:

You lived in Scotland and applied through the Students Award Agency Scotland (SAAS) when you started your course.

You have a Postgraduate Loan if any of the following apply:

- 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

Declaration

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

Signature

Full name

Date DD MM YYYY