Payroll new starter form

Employer and employee: please complete every box and tick one option where choices are shown. Boxes marked "(optional)" may be left blank. Write dates as DD/MM/YYYY. Enclose the employee's P45 (parts 2 and 3) if they have one; if not, the employee should complete HMRC's starter checklist and send it with this form. Do not send copies of passports or other right to work documents unless payroll asks for them.

1. Employee details

Full legal name (as on National Insurance records) _____

Date of birth _____

Gender as recorded with HMRC _____

Home address and postcode _____

NI number, or "Not known" _____

Email address _____

Phone number _____

Bank account name (for wages) _____

Sort code _____

Account number _____

2. Tax code paperwork

P45 OR STARTER CHECKLIST	STUDENT AND POSTGRADUATE LOANS
☐ P45 parts 2 and 3 enclosed ☐ No P45: HMRC starter checklist enclosed ☐ No P45: checklist to follow by ___ / ___ / _____	☐ None ☐ Plan 1 ☐ Plan 2 ☐ Plan 4 ☐ Plan 5 ☐ Postgraduate loan ☐ Not sure (answer on the starter checklist)

3. Job and pay

Employer or business name _____

Job title _____

Start date _____

Contract: ☐ Permanent ☐ Fixed-term ☐ Casual / zero-hours _____

Pay rate: £ _____ ☐ per hour ☐ per year _____

Pay frequency: ☐ Weekly ☐ Fortnightly ☐ 4-weekly ☐ Monthly _____

Normal hours per week _____

First pay date _____

Payroll or works number (optional) _____

Company director? ☐ No ☐ Yes, appointed on (date): _____

Benefits or salary sacrifice (optional) _____

4. Workplace pension

Pension scheme name, or "Assess for auto-enrolment" _____

Contribution rates (optional) _____

5. Right to work (employer to complete)

Date right to work check completed _____

Document or share code checked _____

Checked by _____

6. Signatures

EMPLOYEE	EMPLOYER
I confirm my details above are correct and I will tell my employer if they change.	I confirm these employment details and that the right to work check was completed before employment started.
Signature: _____	Signature: _____
Date: ____ / ____ / _____	Name and role: _____
	Date: ____ / ____ / _____

Before you send

Check that the National Insurance number, date of birth and bank details are complete, the P45 or starter checklist is enclosed or its date is given, the pay rate says per hour or per year, and both signatures are dated. Send this form to payroll before the first pay day so the employee can be reported to HMRC on time.

For payroll use (optional)

SET-UP	PENSION ASSESSMENT
Received on: ____ / ____ / _____	☐ Eligible jobholder (enrol)
Tax code applied: _____	☐ Non-eligible jobholder ☐ Entitled worker
Added to payroll by: _____	☐ Already in a scheme
First FPS including employee: ____ / ____ / _____	☐ Postponed until: ____ / ____ / _____
	Letter sent to employee on: ____ / ____ / _____

Free template from screenmyform.com/forms