



Employee New Starter Form

Client Name:

* Employee Number:

* Excel Payroll Solutions will apply this

Three empty rectangular boxes for employee details.

Title

Gender

Marital Status

Forename

Surname

Address

Post Code

E-Mail Address

Date of Birth

Passport Number

Work Start Date

NI Number

Salary (if applicable)

Hours per week (if applicable)

ONLY PROVIDE BANK DETAILS IF BACS PAYMENTS ARE MADE BY US OR YOU REQUIRE A BACS REPORT Bank

Name

Bank Account Name

Bank Account Type Bank

Sort Code

Bank Account Number - MUST BE 8 DIGITS

Building Society Roll Number

Employment Status

You need to select only one of the following statements A, B or C, failure to do so will result in paying 20% tax on all earnings.

- This is my first job since 6 April and I've not been receiving taxable Jobseeker's Allowance, A Employment and Support Allowance, taxable Incapacity Benefit, State or Occupational Pension.
- This is now my only job but since 6 April I've had another job, or received taxable BJobseeker's Allowance, Employment and Support Allowance or taxable Incapacity Benefit. I do not receive a State or Occupational Pension.
- As well as my new job, I have another job or receive a State or Occupational Pension

Student/Postgraduate Loan

Only needs completing should you have a student loan. For more guidance about repaying go to www.gov.uk/repaying-your-student-loan

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

Yes If Yes, go to question 1
No If No, go to question 4

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

Yes If Yes, go to question 2
No If No, go to question 4

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

Yes If Yes, go to question 3
No If No, go to question 4

3 What type of Student Loan do you have?

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 .

DECLARATION

I confirm that the information I have given on this form is correct

Signature/Name

Date

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

Yes If Yes, go to question 5
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

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

Yes If Yes, go to question 6
No If No, go to the Declaration

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

Yes
No