



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 [text box]

2 First names Do not enter initials or shortened names such as Jim for James or Liz for Elizabeth [text box]

3 Are you male or female? Male [checkbox] Female [checkbox]

4 Date of birth DD MM YYYY [checkbox][checkbox][checkbox][checkbox][checkbox][checkbox]

5 Home address [text box] [text box] [text box] Postcode [text box] Country [text box]

6 National Insurance number if known [checkbox][checkbox][checkbox][checkbox][checkbox][checkbox]

7 Employment start date DD MM YYYY [checkbox][checkbox][checkbox][checkbox][checkbox][checkbox]

Employee statement

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

Table with 3 columns: Statement A, Statement B, Statement C. Each column contains instructions and a list of benefits, followed by a checkbox for selection.

# Student loans

- 9 Tell us if any of the following statements apply to you:
- you do not have any Student or Postgraduate Loans
  - you're still studying full-time on a course that your Student Loan relates to
  - you completed or left your full-time course after the start of the current tax year, which started on 6 April
  - you're already making regular direct debit repayments from your bank, as agreed with the Student Loans Company

If No, tick this box and go to question 10

If Yes, tick this box and go straight to the Declaration

- 10 To avoid repaying more than you need to, tick the correct Student Loans that you have - use the guidance on the right to help you.

Please tick all that apply

Plan 1

Plan 2

Plan 4

Postgraduate Loan (England and Wales only)

Types of Student Loan
<b>You have Plan 1 if any of the following apply:</b> <ul style="list-style-type: none"><li>• you lived in Northern Ireland when you started your course</li><li>• you lived in England or Wales and started your course before 1 September 2012</li></ul>
<b>You have a Plan 2 if:</b> You lived in England or Wales and started your course on or after 1 September 2012.
<b>You have a Plan 4 if:</b> You lived in Scotland and applied through the Students Award Agency Scotland (SAAS) when you started your course.
<b>You have a Postgraduate Loan if any of the following apply:</b> <ul style="list-style-type: none"><li>• you lived in England and started your Postgraduate Master's course on or after 1 August 2016</li><li>• you lived in Wales and started your Postgraduate Master's course on or after 1 August 2017</li><li>• you lived in England or Wales and started your Postgraduate Doctoral course on or after 1 August 2018</li></ul>

Employees, for more information about the type of loan you have, go to [www.gov.uk/sign-in-to-manage-your-student-loan-balance](http://www.gov.uk/sign-in-to-manage-your-student-loan-balance)

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

## Declaration

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

Signature

Full name

Date DD MM YYYY