New starter checklist for Payroll

# Personal details

|  |  |  |
| --- | --- | --- |
|  |  |  |
| 1. **Last name** |  |  |
|  |  |  |
| 1. **First name(s)**   Do not enter initials or shortened names |  |  |
|  |  |  |
| 1. **Are you male or female?** |  | Male Female |
|  |  |  |
| 1. **Date of birth**   **e.g DD/MM/YYYY** |  |  |
|  |  |  |
| 1. **Home address** |  |  |
|  |  |  |
| 1. **National Insurance number if known** |  |  |
|  |  |  |
| 1. **Employment Start Date DD/MM/YYYY** |  |  |
|  |  |  |
| 1. **Employee number** |  |  |

# UK Bank Details

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Bank name** |  | | | | | | | | | | | | | | | | | | |
|  |  | | | | | | | | | | | | | | | | | | |
| **Account holder name** |  | | | | | | | | | | | | | | | | | | |
|  |  | | | | | | | | | | | | | | | | | | |
| **Account number** |  |  |  |  |  |  | |  |  |  | Sort code |  |  | - |  |  | - |  |  |
|  |  | | | | | | | | | | | | | | | | | | |
| **Building society roll number (if applicable**) | | | | | | |  | | | | | | | | | | | | |

# Employee Statement

1. **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:  • 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** |

# Student Loan

For more guidance about repaying,

go to [www.gov.uk/repaying-your-student-loan](http://www.gov.uk/repaying-your-student-loan)

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

Yes  If Yes, go to question 10

No  If No, go to question 13

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

Yes  If Yes, go to question 11

No  If No, go to question 13

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

Yes  If Yes, go to question 13

No  If No, go to question 12

1. **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

# Postgraduate 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)

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

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

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

Yes  If Yes, go to question 15

No  If No, go to the Declaration

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

Yes

No

**Fill in the declaration.**

# Student Loan Declaration

I declare this information to be a true statement to the best of my knowledge and belief and that I consider I am medically able to undertake this work. I understand that failure to disclose relevant information which has a bearing on my fitness to do this job may result in disciplinary action or withdrawal of the offer of work:

|  |  |  |
| --- | --- | --- |
| Signature |  |  |
|  |  |  |
| Print Name |  |  |
|  |  |  |
| Date |  |  |

Return this form to the Payroll email: [payroll@soton.ac.uk](mailto:payroll@soton.ac.uk)

 The information you give will remain completely confidential and will be handled in accordance with the Data Protection Act 1998.