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

|  |
| --- |
| **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 |

1. **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 11

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

1. **To avoid repaying more than you need to, tick the correct Student Loans that you have - use the guidance above to help you.**

Please tick all that apply

Plan 1

Plan 2

Plan 4

Postgraduate Loan (England and Wales only)

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)

# 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 |  |  |

Please return this form to the Payroll department at: [casualpay@soton.ac.uk](mailto:casualpay@soton.ac.uk)

 The information you give will remain confidential and will be handled in accordance with General Data Protection Regulation (GDPR) (EU) 2016/679.