



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

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

3 Are you male or female?
Male Female

4 Date of birth DD MM YYYY

5 Home address

Postcode

Country

6 National Insurance number if known

7 Employment start date DD MM YYYY

Employee statement

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

Statement A	Statement B	Statement C
<p>Do not choose this statement if you're in receipt of a State, Works or Private Pension.</p> <p>Choose this statement if the following applies.</p> <p>This is my first job since 6 April and since the 6 April I've not received payments from any of the following:</p> <ul style="list-style-type: none"> • Jobseeker's Allowance • Employment and Support Allowance • Incapacity Benefit 	<p>Do not choose this statement if you're in receipt of a State, Works or Private Pension.</p> <p>Choose this statement if the following applies.</p> <p>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:</p> <ul style="list-style-type: none"> • Jobseeker's Allowance • Employment and Support Allowance • Incapacity Benefit 	<p>Choose this statement if:</p> <ul style="list-style-type: none"> • you have another job and/or • you're in receipt of a State, Works or Private Pension
Statement A applies to me <input type="checkbox"/>	Statement B applies to me <input type="checkbox"/>	Statement C applies to me <input type="checkbox"/>

Student Loan

For more guidance about repaying, go to www.gov.uk/repaying-your-student-loan

9 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

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

Yes If Yes, go to question 11

No If No, go to question 13

11 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

12 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

For more guidance for employers, go to www.gov.uk/guidance/special-rules-for-student-loans

13 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

14 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

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

Yes

No

Fill in the declaration.

Declaration

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

Signature

Full name

Date DD MM YYYY

I agree to Kaleidoscope Brokerage Ltd Holding my personal details

Please ensure you complete ALL sections or this may delay the payment process

Name of person receiving the support	
PA Telephone Number	
PA Email Address	
PA Start Date with Client	
PA Hourly Rate Of Pay	
Hours to be worked per week	
Are the hours contracted or flexible ?	
DBS No	
Bank Account Number	
Bank Sort Code	
Name of the account holder	
Signature	

