



Starter Checklist

Tell your employer of your circumstances so that you do not pay too much or too little tax

Do not send this form to HM Revenue and Customs (HMRC)

Instructions for employee

Fill in this form if you do not have a P45 (a document you get from your employer when you stop working for them). You should also fill in this form if you have a student loan (whether or not you've a P45). Your employer needs this information to tell HMRC about you and help them to use the right tax code. Make sure you answer the questions correctly. If you do not, you may pay the wrong amount of tax or student loan deductions.

First Name/s – exactly as they appear on your ID document – No Nicknames please

Surname

Date of Birth

Gender, as shown on your Birth Certificate or Gender Recognition Certificate

Home Address

Postcode

National Insurance Number

Employment Start Date

Employee statement

These questions will help you to choose the statement that matches your circumstances. The statement you choose helps your employer to apply the correct tax code.

8. Do you have another job?

Yes Put an 'X' in the statement C box below

No Go to question 9

9. Do you receive payments from a State, workplace or private pension?

Yes Put an 'X' in the statement C box below

No Go to question 10

10. Since 6 April have you received payments from:

- Another job which has ended
- Or any of the following taxable benefits
- Jobseeker's Allowance (JSA)
- Employment and Support Allowance (ESA)
- Incapacity Benefit

Yes Put an 'X' in the statement B box below

No Put an 'X' in the statement A box below

For more information about tax codes, go to www.gov.uk/tax-codes

Statement A

Current personal allowance

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

Tick here

Statement B

Current personal allowance on a Week 1/Month 1 basis

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

Tick here

Statement C

Tax Code BR

Choose this statement if:

- you have another job and/or
- you're in receipt of a State, Works or Private Pension

Tick here

Key

Jobseeker's Allowance (JSA) is an unemployment benefit which can be claimed while looking for work.

Employment and Support Allowance (ESA) is a benefit which can be claimed if you have a disability or health condition that affects how much you can work.

Incapacity Benefit is help if you could not work because of an illness or disability before 31 January 2011.

State Pension is a pension paid when you reach State Pension age.

Workplace pension is a pension which was arranged by your employer and is being paid to you.

Private pension is a pension arranged by you and is being paid to you.

Please note that no other Government or HMRC paid benefits need to be considered when completing this form.

Student Loans

11. Do you have a student or postgraduate loan?

Yes Go to question 12

No Go straight to the Declaration

12. Do any of the following statements apply:

- You're still studying on a course that your student loan relates to
- You completed or left your course after the start of the current tax year, which started on 6 April
- You've already repaid your loan in full
- You're paying the Student Loans Company by Direct Debit from your bank to manage your end of loan repayments

Yes Go straight to the Declaration

No Go to question 13

13. Put 'X' in the correct student loan plan type or postgraduate loan to avoid repaying more than you need to.

Use the guidance below if needed.

Plan 1

Plan 2

Plan 4

Plan 5

Postgraduate loan

You should only select the one plan type you are due to repay (Plan 1, 2, 4 or 5). However, you can also select the Postgraduate Loan option as well as one plan type, if it applies.

Not sure what to select?

Check your current repayment loan or plan type at

www.gov.uk/sign-in-to-manage-your-student-loan-balance

If you applied to Student Finance England you'll be on:

- **Plan 5** - if your course started on or after 1 August 2023
- **Plan 2** - if your course started between 1 September 2012 and 31 July 2023
- **Plan 1** - if your course started before 1 September 2012
- **Postgraduate loan** - if studying postgraduate masters or doctoral course

If you applied to Student Finance Wales you'll be on:

- **Plan 2** - if your course started on or after 1 September 2012
- **Plan 1** - if your course started before 1 September 2012
- **Postgraduate loan** - if studying postgraduate masters or doctoral course

If you applied to Student Awards Agency Scotland you'll be on Plan 4.

If you applied to Student Finance Northern Ireland you'll be on Plan 1.

Declaration

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

I confirm that I have checked all answers provided, and that any mistakes will be reported to Reflect Recruitment Group immediately.

Please Sign

Date