

Completing the HMRC Starter Checklist (For Invigilators)

This document will give employees step by step guidance on completing the HMRC Starter Checklist.



The HMRC Starter Checklist can be accessed at the following link:

[HMRC Started Checklist](#)

Before Completing

Before employees complete this form it is important to read through the **Instructions for Employee** on the first page of the form.

It is important that employees **DO NOT** send this form to 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). Give the completed form to your employer as soon as possible. They need 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.

Employees Personal Details

The first section of the form looks for the Employees Personal Details.

Each sectioned is numbered and this makes the simple to follow and complete.

1. Last name
2. First names
3. What is your sex?
4. Date of birth (DD MM YYYY)
5. Home address (Including Postcode and Country)
6. National Insurance Number (if known)
7. Employment start date (DD MM YYYY)

Employee's personal details

1 Last name

2 First names
Do not enter initials or shortened names for example, Jim for James or Liz for Elizabeth

3 What is your sex?
As shown on your birth certificate or gender recognition certificate
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

The next section looks for your employee statement which includes;

8. Do you have another job?

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

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

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

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

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

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 <input type="checkbox"/>	Statement B <input type="checkbox"/>	Statement C <input type="checkbox"/>
Current personal allowance	Current personal allowance on a Week 1/Month 1 basis	Tax Code BR
<p>Key</p> <p>This is my first job since 6 April and since the 6 April I have 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>Key</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>Key</p> <p>I have another job and/or I am in receipt of a State, workplace or private pension.</p>
<p>Key</p> <p>Jobseeker's Allowance (JSA) is an unemployment benefit which can be claimed while looking for work.</p> <p>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.</p> <p>Incapacity Benefit is help if you could not work because of an illness or disability before 31 January 2011.</p> <p>State Pension is a pension paid when you reach State Pension age.</p> <p>Workplace pension is a pension which was arranged by your employer and is being paid to you.</p> <p>Private pension is a pension arranged by you and is being paid to you.</p> <p>Please note that no other Government or HMRC paid benefits need to be considered when completing this form.</p>		

Student Loans

The next section looks for information on any student loans;

11. Do you have a student or postgraduate loan?

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

13. To avoid repaying more than you need to, tick the correct student loan or loans that you have – use the guidance on the right to help you.

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 To avoid repaying more than you need to, tick the correct student loan or 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)

Employees, for more information about the type of loan you have or to check your balance, go to www.gov.uk/sign-in-to-manage-your-student-loan-balance

Employers, for guidance on student loans and which plan or loan type to use if your employee has selected more than one, go to www.gov.uk/guidance/special-rules-for-student-loans

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 Plan 2 if:

You lived in England or Wales and started your course on or after 1 September 2012.

You have 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

Declaration

You should complete the Declaration;

- Full name
- Signature
- Date (DD MM YYYY)

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

Full name Use capital letters

Signature

Date DD MM YYYY

Give the Form to your Employeeer

Once completed you should submit the form to the **People Operations Team** at the following email:

ESCPeopleOperations@northlan.gov.uk

DO NOT SEND THIS FORM TO HMRC