



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

<p>1 Last name</p> <input type="text"/>	<p>5 Home address</p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/> Country
<p>2 First names Do not enter initials or shortened names such as Jim for James or Liz for Elizabeth</p> <input type="text"/> <input type="text"/>	<p>6 National Insurance number if known</p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<p>3 Are you male or female?</p> Male <input type="checkbox"/> Female <input type="checkbox"/>	<p>7 Employment start date DD MM YYYY</p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<p>4 Date of birth DD MM YYYY</p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	

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
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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • Jobseeker's Allowance • Employment and Support Allowance • Incapacity Benefit 	Choose this statement if: <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 loans

- 9** 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 10

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

- 10** To avoid repaying more than you need to, tick the correct Student 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)

Types of Student Loan
You have Plan 1 if any of the following apply: <ul style="list-style-type: none">• 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: <p>You lived in England or Wales and started your course on or after 1 September 2012.</p>
You have a Plan 4 if: <p>You lived in Scotland and applied through the Students Award Agency Scotland (SAAS) when you started your course.</p>
You have a Postgraduate Loan if any of the following apply: <ul style="list-style-type: none">• 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

Employees, for more information about the type of loan you have, go to 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

Declaration

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

Signature

Full name

Date DD MM YYYY



Bradgate Education Partnership
Trust Offices, Wreake Valley Academy,
Parkstone Road, Syston, Leicester, LE7 1LY

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info@bepschools.org

bepschools.org

BANK DETAILS FORM – NEW STARTERS ONLY

Please complete the form clearly using block capitals in all sections.
ENSURE ALL DETAILS ARE COMPLETE AND CORRECT TO AVOID ANY DELAYS IN PAYMENT

EMPLOYEE DETAILS

SURNAME:		FORENAME:	
NI NUMBER:		SCHOOL:	
JOB TITLE:			

BANK DETAILS

NAME / ADDRESS OF BANK																
NAME ON ACCOUNT:																
SORT CODE:			-			-			ACCOUNT NUMBER:							
BUILDING SOCIETY ROLL NUMBER																
SIGNATURE:									DATE:							

NEW STARTERS – PLEASE RETURN THIS FORM TO YOUR SCHOOL’S OFFICE MANAGER

EXISTING EMPLOYEES – PLEASE MAKE ANY CHANGES TO YOUR BANK DETAILS VIA THE EMPLOYEE SELF SERVICE PORTAL



Staff Personal Details Form

Personal Information

Title:		
Legal Forename:		Legal Surname:

Address

Contact Information

Home Address:		Home Tel No:	
		Mobile No:	
		Personal Email Address:	

Next of Kin

Name:	
Relationship to you:	
Address: (leave blank if same as above)	
Tel No:	
Mobile No:	

If you do not have a personal email address, please inform your Head Teacher/Principal who can provide advice/guidance on how to set one up.

Signature	
Date	

Equal Opportunities Monitoring Section

This Trust is committed to not discriminating under the Equality Act 2010, and building an accurate picture of the make-up of the applicants and workforce in encouraging equality and diversity. The Trust needs your help and co-operation to enable it to do this, filling in this form is voluntary. The information you provide will stay confidential, and be stored securely.

1) How would you describe your ethnicity?

a) White

British

Irish

Any other White background*

* please state below:

b) Mixed

White & Black Caribbean

White & Black African

White & Asian

Any other mixed background*

* please state below:

c) Asian & British Asian

Indian

Pakistani

Bangladeshi

Any other Asian background*

* please state below:

d) Black or Black British

Caribbean

African

Any other Black background*

* please state below:

Prefer not to state

e) Chinese of Other Ethnic Group

Chinese

Any other Ethnic Group*

* please state below:

f) Gypsy / Traveller

Irish Traveller

Romany Gypsy

Any other Asian background*

* please state below:

2) My sex is:

Male

Female

Prefer not to state

3) My date of birth is:

Prefer not to state

4) The Equality Act 2010 defines disability as "A physical or mental impairment which has a substantial and long term adverse effect on the ability to carry out normal day-to-day activities."

I consider myself to be:

Disabled

Non-Disabled

Prefer not to state

5) My religion is:

Buddhist

Christian (all denominations)

Hindu

Jewish

Muslim

Sikh

None

Prefer not to state

Other * please state:

6) My sexual orientation is:

Bi-sexual

Gay

Lesbian

Heterosexual

Transgender

Prefer not to state

Other *

* please state:

7) My nationality is: