Employee checklist: Required information

QX ACCOUNTING SERVICES

To set up an employee with QXAS for payroll, you will first need fill this employee starter checklist. Use our checklist to organise employee's personal details, work and pay details, bank details, starter data, and P45 from previous employment. You may download the employer checklist from: http://www.qxas.co.uk/payroll-outsourcing-for-accountants/employer-checklist

Employer Name :

Personal Details

Surname

Forename 1

Forename 2

Title

Preferred Name

Gender

☐ Male ☐ Female

Date of Birth (DD/MM/YY)

☐ / ☐ / ☐

Passport Number

Address

Postcode

Country (if not UK)

Telephone

Mobile

Email

Work and Pay Details

NI Number

Job Title

Department

Pay Frequency

☐ Weekly

☐ 2 - Weekly

☐ 4 - Weekly

☐ Monthly

Works Number

Director

☐ Yes ☐ No

Start Date

☐ / ☐ / ☐

Tax Code

Taxbasis

☐ W1M1 ☐ Cumulative

Normal Hours

☐ A : Up to 15.99

☐ B: 16-29.99 hrs

☐ C: 30 hrs or more

☐ D: Other

Pay Method

☐ BACS

☐ BACS (With hash code)

☐ Cash

☐ Cheque

NI Table Letter

Normal Pay Rate

Employee checklist: Required information

Bank Details

Bank Name

Account Name

Sort Code

Account Number

Starter Data

Starter Type

- Existing employee
- Starter with a P45
- Starter without a P45

Starter Declaration

- This is my first job since the start of the tax year
- I have had another job since the start of the tax year, but this is now my only job
- I currently have another job or pension

Student Loans

- I make Student Loan repayments through payroll Plan Typle (1 or 2)

Student Loan Start Date

/ /

P45 From Previous Employment

Leaving date (DD/MM/YY)

/ /

Tax Code

Taxbasis

- W1M1
- Cumulative

Month Number

Week Number

Pay to date

Tax to date

Office Number

Reference Number