



Starter checklist for Suppliers

Instructions for University engagers

This Starter Checklist can be used to gather information about your new supplier. The University needs this information to help fill in the first Full Payment Submission (FPS) for this supplier. The University needs to keep the information recorded on the Starter Checklist record for the current and previous three tax years. Please ensure this form is given to suppliers who fall within the IR35 test. We also require information from the engager to facilitate the process. Please complete the questions below in full.

Start Date

College/US

Department

Subject/Section

Cost Centre

Project

Contact Name

Contact Tel/Ext

Engagers Work Group

Instructions for suppliers

As a new supplier who falls within the scope of the IR35 regulations the University 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 University engager either with or before your first invoice.

Supplier's personal details

1 Last name

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

3 Are you male or female?

4 Date of birth DD MM YYYY

5 Home address

Postcode/Country

6 National Insurance number (if known)

7 start date DD MM YYYY

Supplier statement

8 You need to select only one of the following statements A, B or C

- A** This is my first work since last 6 April and I have not been receiving taxable Jobseeker's Allowance, Employment and Support Allowance, taxable Incapacity Benefit, State or Occupational Pension.
- B** This is now my only work but since last 6 April I have had other work, or received taxable Jobseeker's Allowance, Employment and Support Allowance or taxable Incapacity Benefit. I do not receive a State or Occupational Pension.
- C** As well as my new work, I have other work or receive a State or Occupational Pension.

Student Loan

9 Do you have a Student Loan which is not fully repaid?

Yes If yes, go to question 10

No If no, go to question 12

10 Are you repaying your Student Loan direct to the Student Loans Company by agreed monthly payments?

Yes If yes, go to question 12

No If no, go to question 11

Student Loan Plans

You will have a Plan 1 Student Loan if:

- You lived in Scotland or Northern Ireland when you started your course, or
- You lived in England or Wales and started your course before September 2012

You will have a Plan 2 Student Loan if you lived in England or Wales and started your course on or after 1 September 2012.

11 What type of Student Loan do you have?

Plan 1

Plan 2

12 Did you finish your studies before the last 6 April?

Yes

No

For further guidance about repaying Student Loans go to www.gov.uk/new-employee/student-loans

Signature

Name

Date DD MM YYYY