**SRPPS-EEV1: New Payee Set Up Form**

This form facilitates collection of information to support Edge Hill University Payroll team set-up of new payees and support processing for payment. This form includes a section on equality monitoring for statutory and Edge Hill University monitoring and reporting purposes.

Once completed please return to [quality@edgehill.ac.uk](mailto:quality@edgehill.ac.uk) or the Governance, Quality Assurance and Student Casework, SAC building, Room 1.04, Edge Hill University, St. Helens Road, Ormskirk, Lancashire, L39 4QP. Any claim for payment must be made via a Fee/Expense claim form.

## **Section A: Your Personal Details and Contact Information**

|  |  |  |  |
| --- | --- | --- | --- |
| **Title:** |  | **Surname**: |  |
| **Forename and other names** |  | **Date of Birth:**  **(dd/mm/yyyy)** |  |

| **National Insurance (NI) Number:** |  |
| --- | --- |
| **Contact Telephone Number:** |  |
| **Contact Home Address (including post code):** |  |
| **Email Address for e-payslip:** |  |

## **Section B: Engagement Details**

Please confirm the nature of your work or engagement with Edge Hill University by marking ‘X’ against the applicable category. If you are unsure, please contact the Department or named contact who provided you with this form.

| External Consultant |  |
| --- | --- |
| External Panel Member |  |
| External Examiner |  |

***Please go to the next page***

## **Section C: Your Bank or Building Society Account Details:**

It is important you fill in each box correctly and as it appears on your card or bank statement. Please ensure to include your building society roll or reference number if you have one.

| **Name on Account** |  |
| --- | --- |
| **Full Name of bank or building society:** |  |
| **Sort Code: (6 numbers only)** |  |
| **Account Number: (8 digits only)** |  |
| **Building society roll or reference number (if applicable):** |  |

## **Section D: HMRC New Starter Checklist**

These questions will help you to choose the statement that matches your circumstances. The statement you choose helps Edge Hill University to apply the correct tax code so that you do not pay too much or too little tax.

1. Do you have another job? (Mark your answer with an ‘X’)

| No |  | Please go to question 2 |
| --- | --- | --- |
| Yes |  | Please put an ‘X’ in the statement C box below and go to question 4 |

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

| No |  | Please go to question 3 |
| --- | --- | --- |
| Yes |  | Please put an ‘X’ in the statement C box below and go to question 4 |

1. 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

| No |  | Please put an ‘X’ in the statement A box below and go to question 4 |
| --- | --- | --- |
| Yes |  | Please put an ‘X’ in the statement B box below and go to question 4 |

Statement Box

| Statement A |  | Current personal allowance |
| --- | --- | --- |
| Statement B |  | Current personal allowance on a Week 1/Month 1 basis |
| Statement C |  | Tax Code BR |

1. Do you have a student or postgraduate loan?

| No |  | Please go to **section E** |
| --- | --- | --- |
| Yes |  | Please go to question 5 |

1. 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

| No |  | Please go to question 6 |
| --- | --- | --- |
| Yes |  | Please go to **section E** |

1. To avoid repaying more than you need to, tick the correct student loan or loans that you have – use the guidance below to help you.
   * Please tick all that apply.
   * 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

| Plan 1 |  | 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 |
| --- | --- | --- |
| Plan 2 |  | You have Plan 2 if:   * You lived in England or Wales and started your course on or after 1 September 2012. |
| Plan 4 |  | You have Plan 4 if:   * You lived in Scotland and applied through the Students Award Agency Scotland (SAAS) when you started your course. |
| Postgraduate Loan (England and Wales only) |  | 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 |

***Please go to the next page***

## **Section E: Equal Opportunities Monitoring**

Edge Hill University is committed to a policy of equal opportunity, diversity, and inclusion. To help us monitor this commitment, we ask you to complete the following questions. Your responses will also be used anonymously for statutory reporting purposes, including submission to HESA – the Higher Education Statistics Agency. Information on how HESA process your anonymised data is available from the [HESA Staff Return collection notice](https://www.hesa.ac.uk/about/regulation/data-protection/notices#staff).

Your information will be treated as confidential and used only for these stated purposes.

Please note, HMRC’s New Starter form asks about your sex and offers two response options only. For Edge Hill University monitoring and statutory reporting purposes we offer this question again with 3 options.

| **What is your sex?**  **(Male, Female, Other)** |  |
| --- | --- |

| **Is the gender you identify with the same as your sex registered at birth?**  **(Yes, No, Prefer not to say)** |  |
| --- | --- |

| **What is your nationality/ citizenship?** |  |
| --- | --- |
| **What is your Country of Birth?** |  |

**What is your ethnic group?** (Mark your answer with an ‘X’; please note ethnic group is about the group to which you perceive you belong).

| Asian - Bangladeshi or Bangladeshi British |  | Asian - Indian or Indian British |  | Asian - Chinese or Chinese British |  |
| --- | --- | --- | --- | --- | --- |
| Asian - Pakistani or Pakistani British |  | Any other Asian background |  | Arab |  |
| Black - African or African British |  | Black - Carribean or Caribbean British |  | Any other Black background |  |
| Mixed or multiple ethnic groups - White or White British and Asian or Asian British |  | Mixed or multiple ethnic groups - White or White British and Black African or Black African British |  | Mixed or multiple ethnic groups - White or White British and Black Caribbean or Black Caribbean British |  |
| Any other Mixed or Multiple ethnic background |  | White - English, Scottish, Welsh, Northern Irish or British |  | White - Gypsy or Irish Traveller |  |
| White - Irish |  | White - Roma |  | Any other White background |  |
| Any other ethnic background |  | Prefer not to say |  |  | |

**What is your religion?**

(Mark your answer(s) with an ‘X’)

| No religion |  | Buddhist |  | Christian |  |
| --- | --- | --- | --- | --- | --- |
| Hindu |  | Jewish |  | Muslim |  |
| Sikh |  | Any other religion or belief |  | Prefer not to say |  |

**Do you have an impairment, health condition or learning difference that has substantial and long-term impact on your ability to carry out normal day-to-day activities?**

(Mark your answer(s) with an ‘X’)

| No known impairment, health condition or learning difference |  | Two or more impairments and/or disabling medical conditions |  | A specific learning difficulty such as dyslexia, dyspraxia or AD(H)D |  |
| --- | --- | --- | --- | --- | --- |
| Development condition that you have had since childhood which affects motor, cognitive, social and emotional skills, and speech and language |  | A social/communication impairment such as Asperger's syndrome/other autistic spectrum disorder |  | A long standing illness or health condition such as cancer, HIV, diabetes, chronic heart disease, or epilepsy |  |
| A mental health condition, such as depression, schizophrenia or anxiety disorder |  | A physical impairment or mobility issues, such as difficulty using arms or using a wheelchair or crutches |  | Deaf or serious hearing impairment |  |
| Blind or a serious visual impairment uncorrected by glasses |  | A disability, impairment or medical condition that is not otherwise listed |  | Prefer not to say |  |

**Which of the following best describes your sexual orientation?**

(Mark your answer(s) with an ‘X’)

| Bisexual |  | Gay or lesbian |  | Heterosexual or straight |  |
| --- | --- | --- | --- | --- | --- |
| Other sexual orientation |  | Prefer not to say |  |  | |

**What is your legal marital or registered civil partnership status?**

(Mark your answer(s) with an ‘X’)

| Never married and never registered in a civil partnership |  | Married or in a registered civil partnership |  | Separated (but still legally married or in a civil partnership) |  |
| --- | --- | --- | --- | --- | --- |
| Divorced or formerly in a civil partnership which is now legally dissolved |  | Widowed or a surviving partner from a registered civil partnership |  | Co-habiting |  |
| Prefer not to say |  |  |  |  |  |

## **Section F: Your Declaration**

To confirm your agreement to be set up on Edge Hill University’s Payroll Information system and for your information to be used for purposes such as statutory reporting and University Equality, Diversity and Inclusion monitoring please sign and date this form.

By signing this form you are also confirming that the information you have given is correct and are aware that information will be used to help Edge Hill University use the right tax code.

For further information on how your personal information is used, how we maintain the security of your information, our retention processes, and your rights to access information we hold on you, please visit our privacy notices available from [www.jobs.edgehill.ac.uk](http://www.jobs.edgehill.ac.uk).

| Your Signature: |  | Date: |  |
| --- | --- | --- | --- |

Thank you for completing this form,

**Please ensure to also sign the Terms and Conditions document, provided with this form.**