

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 externalexaminers@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/mmm/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.

Account Holder Name	
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

2) 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

3) 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

4) Do you have a student or postgraduate loan?

No		Please go to section E
Yes		Please go to question 5

5) 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

6) 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: <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
Plan 2		You have Plan 2 if: <ul style="list-style-type: none"> • You lived in England or Wales and started your course on or after 1 September 2012.
Plan 4		You have Plan 4 if: <ul style="list-style-type: none"> • 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: <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

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](#).

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

Your Signature:		Date:	
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Thank you for completing this form,

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