

Payroll Setup Quiz

New Client Payroll Registration Details

Client Details

Client Name *

Completed By *

Date *

Existing Payroll Details

Does the client already have a payroll in place? *

☐ Yes ☐ No

If yes, we need the PAYE reference and accounts office reference numbers.

PAYE Reference

Accounts Office Reference

Main Director Details

Director Name *

National Insurance Number *

Employee Information

If there are actual employees (rather than just directors), we will need to send new starter forms for each and will need P45 leaver's certificates from their previous employers if available.

Number of Employees on Payroll *

Starter Forms Sent?

☐ Yes ☐ No ☐ N/A (Directors only)

P45 Requested?

☐ Yes ☐ No ☐ N/A

Employee Details (if known)

Optional: If employee details are known, please add them below.

Employee 1

Full Name

National Insurance Number

Date of Birth

Start Date

Email Address

Job Title

Salary/Hourly Rate:

Payment Frequency: ☐ Weekly ☐ Fortnightly ☐ Monthly Has P45? ☐ Yes ☐ No

Address

Employee 2

Full Name

National Insurance Number

Date of Birth

Start Date

Email Address

Job Title

Salary/Hourly Rate:

Payment Frequency: ☐ Weekly ☐ Fortnightly ☐ Monthly Has P45? ☐ Yes ☐ No

Address

Employee 3

Full Name

National Insurance Number

Date of Birth

Start Date

Email Address

Job Title

Salary/Hourly Rate:

Payment Frequency: ☐ Weekly ☐ Fortnightly ☐ Monthly Has P45? ☐ Yes ☐ No

Address

Payroll Start Date

Important: The payroll start date must be the 6th of any given month.

Payroll Start Date *

Construction Industry Scheme (CIS)

Employing Sub-contractors? *

☐ Yes ☐ No

Suffering Deductions? *

☐ Yes ☐ No

Additional Notes

Any other information we should know? (e.g. pension schemes, benefits, special circumstances)

