

Help with New Starters

What do to when an Employee joins with a P45

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Before RTI came into being, employees that joined a company without a P45 would have to fill out a P46. Under RTI, the P46 is replaced with the 'Starter Checklist', which is similar to the P46. But now, under RTI, even when an employee provides a P45, a starter declaration must be filled out as well.

Important: When an employee joins a company, even if they produce a P45, you must also fill out the starter checklist for them.

For more information on the 'Starter Checklist' – see the '**What is a Starter Checklist**' section below.

What to do when an employee joins with a P45

Entering P45 details:

When setting up a new employee, in the '**Employee Maintenance**' screen where you enter the employees name, address, date of birth etc, go to the '**Tax and NI**' tab along the top, you can enter P45 details in the section marked '**Previous P45 Pay and Tax**':

Previous Employment P45 Pay and Tax				
Gross Pay	Tax Paid	Tax Code	W1/M1	Pay Frequency
0.00	0.00		<input type="checkbox"/>	Monthly
Date of Leaving	// /	<input type="checkbox"/> Student Loan?	<input type="checkbox"/> P6 Details	
Previous Employer	PAYE Reference	Last Pay Period	P11 Tax	
Tax District		1	0.00	
<input type="button" value="Add New"/>		<input type="button" value="Enter P46 details"/> <input type="button" value="P45 Check"/>		
			<input type="checkbox"/> No Pay Until April	

It is critical that you enter the information exactly as it is shown on the P45 into this screen; otherwise, this will mean that QTAC has incorrect information when running its P45 check.

Make sure you select the correct '**Pay Frequency**' as either 'Weekly' or 'Monthly' and set the '**Last Pay Period**' as stated on the P45.

Entering Starter Declarations/P46 details:

- Click the '**Enter P46 Details**' button on that screen
- Select the '**P46 Selection**' required for this employee – either P46, P46 Expat or P46 Pension
- Select each '**P46 Declaration**' that applies to this employee - you should get the new employee to fill out this declaration by giving them the 'Start Checklist' form, this will help you select the appropriate option here
- If you want to print this declaration screen click '**Print**'
- Click '**Save**' and '**Close**' – this will amend the tax code according to the declaration selection you have made
- Jobs-a-good'n (Bristol terminology for Job finished/the jobs a good one)

What is a 'Starter Checklist'?

Important: When an employee joins a company, even if they produce a P45, you must also fill out the starter checklist for them!

If the employee doesn't have a P45, perhaps because they're starting their first job or working two jobs at the same time, you must get the new employee to fill out a 'Starter Checklist' to complete. It contains important information that affects the amount of tax you'll pay, such as:

- Employees first job this tax year
- Employee has been claiming Jobseeker's Allowance or Employment and Support Allowance
- Employee has another job
- Employee is paying off a student loan

Again, remember that the Starter Checklist replaces form P46. The checklist will ask relevant information before the first payday to tell HMRC about the employee. It helps employers to allocate a tax code and work out the tax due on the first pay day. When the company RTI details are sent to HMRC, they will process the information you have provided on the Starter checklist and where necessary revise the tax code.

Search HMRC's website for 'Starter Checklist' to get a copy or for more information.