

Supporting Document - P45 Part 3 Employee In Year Document

Please Note: Labels marked in **Red** in this document indicates mandatory fields and should be completed (filled up) in the spreadsheet.

B1 Title : (Optional)

Enter here the title of the employee. E.g.: Mr, Mrs, Miss, Ms.

Please note,

1. First character must be an alphabet.
2. You should only use the characters defined in the Schema i.e, A-Z upper or lower case, space, hyphen, full stop and apostrophe.
3. The length should not exceed 35 characters.

B2 First Forename : (Mandatory)

Enter here the employee's first name. This field is mandatory.

Please note,

1. First character must be an alphabet.
2. You should only use the characters defined in the Schema i.e, A-Z upper or lower case, space, hyphen, full stop and apostrophe.
3. The length should not exceed 35 characters.

Please note, the special characters listed below must not be used when you enter the employee's First forename.

1. ` This is not an apostrophe, this is a grave accent. Please do not use this special character instead of an apostrophe.
2. , comma
3. _ underscore
4. () opening and closing parenthesis
5. / Forward slash
6. 0 zero (in place of alphabet O)
7. 1 2 3 numbers
8. * asterisk
9. ? question mark.

B3 Second Forename : (Optional)

Enter here the employee's Second forename.

Please note,

1. First character must be an alphabet.
2. You should only use the characters defined in the Schema i.e, A-Z upper or lower case, space, hyphen, full stop and apostrophe.
3. The length should not exceed 35 characters.

Please note, the special characters listed below must not be used when you enter the employee's Second forename.

1. ` This is not an apostrophe, this is a grave accent. Please do not use this special character instead of an apostrophe.
2. , comma
3. _ underscore
4. () opening and closing parenthesis
5. / Forward slash
6. 0 zero (in place of alphabet O)
7. 1 2 3 numbers
8. * asterisk
9. ? question mark.

B4 Surname : (Mandatory)

Enter here the employee's Surname. This field is mandatory.

Please note,

1. First character must be an alphabet.
2. You should only use the characters defined in the Schema i.e, A-Z upper or lower case, space, hyphen and apostrophe.
3. The length should not exceed 35 characters.

Please note, the special characters listed below must not be used when you enter the employee's Surname.

1. ` This is not an apostrophe, this is a grave accent. Please do not use this special character instead of an apostrophe.
2. , comma
3. _ underscore
4. () opening and closing parenthesis
5. / Forward slash
6. 0 zero (in place of alphabet O)
7. 1 2 3 numbers
8. * asterisk
9. ? question mark.
10. . full stop.

B5 Address Line 1 : (Mandatory)

Enter here the employee's address Line 1. This field is mandatory.

Please note the following when you enter the address

1. A single address line can contain a maximum of 35 characters including spaces.
2. Enter at least two Address lines i.e Address Line 1 and 2.

Please note, the special characters listed below must not be used when you enter the employee's address.

1. ` This is not an apostrophe, this is a grave accent. Please do not use this special character instead of an apostrophe.
2. _ underscore .
3. \ Back slash.

B6 Address Line 2 : (Mandatory)

Enter here the employee's address Line 2. This field is mandatory.

Please note,

1. The length should not exceed 35 characters including spaces.
2. Please do not enter any invalid characters as listed for employee's Address Line 1.

B7 Address Line 3 : (Optional)

Enter here the employee's address Line 3, if present.

Please note,

1. The length should not exceed 35 characters including spaces.
2. Please do not enter any invalid characters as listed for employee's Address Line 1.

B8 Address Line 4 : (Optional)

Enter here the employee's address Line 4, if present.

Please note,

1. The length should not exceed 35 characters including spaces.
2. Please do not enter any invalid characters as listed for employee's Address Line 1.

B9 Postcode : (Optional)

Enter here the postcode of the employee's address , if present .
e.g. EP1 3SO.

Please note ,

1. It must contain alphanumeric characters only. Space is allowed.
2. The length should not exceed 10 characters.

B10 Country : (Optional)

Enter here the Country of the employee's address.

Please note ,

1. The length should not exceed 35 characters.
2. Please do not enter any invalid characters as listed for employee's Address Line 1.

B11 Works Number : (Optional)

Enter here the employee's Works Number. Please note that the employee's Works Number should not exceed 35 characters.

Please note, the special characters listed below must not be used when you enter the employee's Works Number.

1. ` This is not an apostrophe, this is a grave accent. Please do not use this special character instead of an apostrophe.
2. _ underscore
3. \ Back slash

B12 NI Number : (Optional)

Enter here the employee's National Insurance number (NINO). If the NI number is not known, leave it blank.

Please note, the NINO must follow the acceptable format as below :

1. Characters 1 & 2 must be alpha and must be one of the issued National Insurance Number prefixes. Character 1 must not be D, F, I, Q, U, V or X.
2. Characters 3 - 8 must be numeric.
3. Character 9 must be alpha in the range A - D or a space.

For Example: Two alpha (AA) six digits (123456) one alpha (A, B, C, D or space) "AA123456A" or "BB123456 ".

B13 Date of Birth : (Optional)

Enter here the date of birth of the employee.

Please note,

1. It must be a valid calendar date .The date can be in a **YYYY-MM-DD or DD/MM/YYYY or DD/MM/YY** format.
2. It must be today or earlier.

B14 Gender : (Optional)

Enter here the employee's gender.

Please note,

1. If present, it must be entered as 'Male' or 'M' or 'Female' or 'F'.

B15 Job Title : (Optional)

Enter here the employee's job title in the new employment. Please note that the employee's Job title should not exceed 35 characters.

Please note, the special characters listed below must not be used when you enter the employee's job title.

1. ` This is not an apostrophe, this is a grave accent. Please do not use this special character instead of an apostrophe.
2. _ underscore
3. \ Back slash

B16 Start Date : (Mandatory)

Enter here the date from which the employee started working for you (new employment). This field is mandatory.

Please note,

1. It must be a valid calendar date .The date can be in a **YYYY-MM-DD or DD/MM/YYYY or DD/MM/YY** format.
2. It must be in the current tax year or earlier.

B17 Leaving Date : (Mandatory)

Enter here the employee's date of leaving the previous employment. This field is mandatory.

Please note,

1. It must be a valid calendar date .The date can be in a **YYYY-MM-DD or DD/MM/YYYY or DD/MM/YY** format.
2. It must be in the current tax year or in the previous 6 tax years, i.e. cannot be earlier than 6 tax years .

B18 Previous Employer Tax Office Number : (Mandatory)

Enter here the previous employer's Tax Office number. This field is mandatory.

Please note,

1. This must be the number of the Tax Office responsible for that employer's PAYE scheme.
2. The length should not exceed 3 digits.
3. Leading zeros are allowed.
4. 000 is invalid.

B19 Previous Employer Tax Office Reference : (Mandatory)

Enter here the previous employer's Tax Office Reference. This field is mandatory.

Please note,

1. This must be the Tax office reference for that employer's scheme.
2. The first character must be alphanumeric.
3. The length should not exceed 10 characters.

Please note, the special characters listed below must not be used when you enter the previous employer's tax office reference.

1. ` This is not an apostrophe, this is a grave accent. Please do not use this special character
instead of an apostrophe.
2. _ underscore
3. \ Back slash

B20 Tax Code in Use : (Optional)

Enter here the current Tax Code in use for the employee.

Please note,

1. It must be a minimum of 2 characters and a maximum of 7, i.e. 451L.
2. A leading zero is only allowed with 0T.

Common reasons for errors are listed below:

1. K after number i.e. 123K - should be entered as K123
2. DO & OT should be entered as D0 & 0T (0 zero not O alpha)
3. Leading zeros - 00495L should be 495L
4. Leading zeros after K - K00123 should be K123
5. H codes i.e. 456H is no longer valid
6. W, X, WK1, /1 are examples of letters shown after the tax code to denote a week 1 basis i.e. 345LWK1. None of these are allowed.
7. NI is a payroll indicator. It is not a valid code.

B21 Week1/Month1 Indicator (Yes/No) : (Optional)

Enter here Week1/Month1 indicator, for employee's Tax code in use.

If the employee's Tax code is operated on a week 1 or month 1 basis (non-cumulative), then enter 'Yes' or 'Y'. Otherwise enter 'No' or 'N' or leave it blank, if the employee is taxed on a cumulative basis.

When a code is operated on a week 1 or month 1 basis it is non-cumulative, which means that the employee's 'cumulative' earnings in the year are ignored when calculating the tax; instead tax is calculated only on their earnings in the current pay period. In other words, every time the employee is paid, the tax is calculated as if it were the first pay period of the tax year.

When a code is operated on a cumulative basis, the earnings of the employee in the tax year are added up and tax is calculated on the total cumulative earnings of the employee.

Please note that the indicator must be given only if employee Tax code in use is present.

B22 Tax Code at Leaving : (Mandatory)

Enter here the employee's Tax Code at date of leaving the previous employment. This field is mandatory.

Please note,

1. It must be a minimum of 2 characters and a maximum of 7 in length, i.e. 451L.
2. A leading zero is only allowed with OT.

Common reasons for errors are listed below:

1. K entered after number i.e. 123K. It should be K123
2. DO & OT should be entered as D0 & 0T (0 zero not O alpha)
3. Leading zeros - 00495L should be entered as 495L
4. Leading zeros after K - K00123 should be entered as K123
5. H codes i.e. 456H is no longer a valid tax code
6. W, X, WK1, /1 are examples of letters shown after a tax code to denote a week 1 basis i.e. 345LWK1. None of these are allowed.
7. NI is a payroll indicator. It is not a valid tax code.

B23 Week1/Month1 Indicator (Yes/No) : (Optional)

Enter here Week1/Month1 indicator, for employee's Tax code at Leaving.

If the employee's Tax code was operated on a week 1 or month 1 basis (non-cumulative), then enter 'Yes' or 'Y'. Otherwise enter 'No' or 'N' or leave it blank, if the employee was taxed on a cumulative basis.

When a code is operated on a week 1 or month 1 basis it is non-cumulative, which means that the employee's 'cumulative' earnings in the year are ignored when calculating the tax; instead tax is calculated only on their earnings in the current pay period. In other words, every time the employee is paid, the tax is calculated as if it were the first pay period of the tax year.

When a code is operated on a cumulative basis, the earnings of the employee in the tax year are added up and tax is calculated on the total cumulative earnings of the employee.

B24 Pay Frequency (Month/Week) : (Optional)

Enter here the employee's payment frequency i.e how frequently the employee was paid in the previous employment. Complete this field only if the Tax code at Leaving is cumulative.

Please note,

1. If the employee was paid monthly, enter 'Month' or 'M'.
2. If the employee was paid Weekly, 2 Weekly or 4 Weekly, enter 'Week' or 'W'.

B25 Last Period Number : (Optional)

Enter here the last pay period number, i.e week or month number that the employee left the previous employment.

Please note,

1. This field is mandatory if the employee's Tax code at Leaving was operated on a

cumulative basis.

2. If Pay Frequency is set to "month", last period number must be in the range 01-12.
3. If Pay Frequency is set to "week", last period number must be in the range 01-54 or 56.
4. 0 (Zero) is not allowed in this field.
5. The length should not exceed 2 digits.

B26 Total Pay TD : (Optional)

Enter here the Total Pay to date of the employee. Complete this field only if the Tax code at Leaving is cumulative.

Please note the following when you enter the amount:

1. It must be in pounds and pence.
2. It must be greater than or equal to zero. Negative figures are not allowed.
3. A thousand comma separator within the figure is not allowed.
e.g. the figure 1,234.00 is invalid.

It should be entered as 1234.00 without the comma.

4. It must be greater than or equal to Total Tax to date.

B27 Total Tax TD : (Optional)

Enter here the Total Tax to date of the employee . Complete this field only if the Tax code at Leaving is cumulative.

Please note the following when you enter the amount:

1. It must be in pounds and pence.
2. It must be greater than or equal to zero. Negative figures are not allowed.
3. A thousand comma separator within the figure is not allowed.
e.g. the figure 1,234.00 is invalid.

It should be entered as 1234.00 without the comma.

B28 No Pay Until April (Yes) : (Optional)

Enter here the "No Pay until April" status for the employee.

If the employee has joined now, but is not paid between now and 5th April, that is, the first salary will be paid in the new tax year after 5th April, then enter 'Yes' or 'Y'. If not applicable, leave it blank.

B29 P11 Figure : (Optional)

Enter here the P11 Figure for employee.

If tax figure entered on employee P11 for this employment, differs from Total Tax To Date figure from previous employment, then enter the P11 figure here. If not applicable, leave it blank.

Please note the following when you enter the amount:

1. It must be in pounds and pence.
2. It must be greater than or equal to zero. Negative figures are not allowed.
3. A thousand comma separator within the figure is not allowed.
e.g. the figure 1,234.00 is invalid.

It should be entered as 1234.00 without the comma.

B30 Student Loan (Yes) : (Optional)

Enter here the "Student Loan " status for the employee.

If the employee is making student loan payments, then enter 'Yes' or 'Y'. If not applicable, leave it blank.