New starter checklist

> Six things must be collected or done before a new starter's first payday: right to work evidence, personal and bank details, their P45 or starter declaration, an emergency contact, a written statement of employment particulars on or before day one, and pension auto-enrolment assessment. Everything else is helpful; those six are the ones that cause real problems when they're missed.

The new starter paperwork checklist

Must have - before the first payday

- Right to work evidence - checked before they start, copy dated and stored (the full checklist).
- Written statement of employment particulars - a day-one right, given on or before the first day. Job title, start date, pay, hours, holiday, place of work, notice, probation and more.
- Personal details - legal name, address, date of birth, National Insurance number.
- Bank details - account number, sort code, account name.
- P45, or a starter declaration if they don't have one - this sets their tax code and prevents an emergency-tax first payslip.
- Pension auto-enrolment assessment - anyone earning over £10,000 and aged 22 to state pension age must be enrolled, with the statutory communication issued.
- Emergency contact - name, relationship, number.

Should have - first week

- Signed contract returned
- Policy acknowledgements: handbook, IT/acceptable use, data protection, health and safety
- Equipment issued and recorded (who has what, and its condition)
- System accounts, email and access rights - matched to the role, not copied from whoever sits nearby
- Any role-specific checks: DBS, professional registration, driving licence, certifications
- Diversity monitoring form - always optional, always separate from the personnel file

Good to have - first month

- Probation review dates in the diary (with the 2027 rules in mind)
- Training plan and any mandatory e-learning
- Benefits enrolment, where a window applies
- Working pattern confirmed on the record, so leave accrual is right from the start
- Holiday entitlement calculated pro rata for the part-year they're joining (calculator)

What is a starter declaration?

Where a new employee has no P45 - a first job, a second job, or one that's simply been lost - HMRC's starter declaration establishes which tax code applies by asking which of three statements fits their situation. Getting it before the first payroll run is what prevents the classic new-starter complaint: an emergency tax code and a smaller-than-expected first payslip.

What must the written statement include?

- Must be in the principal statement - Examples
- The basics - names of employer and employee, start date, continuous employment date
- Pay and hours - rate, how and when paid, working hours and days, whether variable
- Where and what - job title or description, place of work
- Time off - holiday entitlement and pay, sick leave and pay entitlement
- Other terms - probation period and conditions, notice periods, benefits, training entitlement

Why does the order matter?

Because two of these have hard deadlines attached and the rest don't. The right to work check must happen before they work a single hour, and the written statement must be issued on or before day one. Everything else can be chased in week one without consequence. Teams that treat the whole list as equally urgent tend to miss the two that actually bite.

> A free template from CoDash - codash.co.uk/templates. Edit it to match how your company actually works, and take advice on anything unusual.