Employer Onboarding Pack

Everything to take on a new employee in the UK: pre-start checklist, new starter details form, right-to-work check record, payroll set-up form and probation review. Edit and print these pages for your own use.

General information for UK employers, not legal or tax advice. Check GOV.UK for current rules, particularly the right-to-work guidance.

1. Pre-start checklist

Before the offer is confirmed

- ☐ Confirm the role, pay, hours, start date and any probation period in the offer letter.
- ☐ Check the National Minimum Wage / National Living Wage for the employee's age and the work they will do.
- ☐ Check if the role needs a DBS check, and start it early if so.

Before the first day

- ☐ Right to work: complete and record the check before they start (section 3).
- ☐ Give a written statement of employment particulars. Employees are entitled to this on or before their first day of work.
- ☐ Check you hold employers' liability insurance and display the certificate where staff can see it or make it available electronically.
- ☐ Ask for a P45 from their previous job, or ask them to complete the HMRC starter checklist if they have none.
- ☐ Assess them for workplace pension auto-enrolment (see our Auto-Enrolment Employer Checklist).
- ☐ Collect the payroll set-up details (section 4). Store bank and National Insurance details securely.
- ☐ Set up their email, equipment, building access and any software accounts.
- ☐ Book their induction and name a buddy or line manager for week one.

Payroll: on or before their first payday

- ☐ Add them to payroll with the correct tax code and student loan plan.
- ☐ Tell HMRC about the new employee in your first FPS. This must be on or before their first payday.
- ☐ Provide payslips for every pay period.
- ☐ Keep a copy of their P45 or starter checklist with the payroll records.

2. New starter details form

Ask the employee to complete this. Keep it secure and use it only for employment and payroll purposes.

Personal and job details	
Full name	
Preferred name	
Home address	
Date of birth	
Personal email	
Mobile number	
Job title	
Start date	

Emergency contact	
Name	
Relationship	
Phone number	

Other	
Any adjustments needed at work (optional)	
Dietary or access requirements for the first day (optional)	

3. Right-to-work check record

Complete before the employee starts. Follow the current Home Office guidance on GOV.UK. For British and Irish citizens and many others, a check can be done online or using their passport. For people with a share code, use the online service.

Check record	
Employee name	
Date of check (before start date)	
How the check was done (original documents in person, online with share code, identity service provider)	
Documents or share code seen	
Do the documents appear genuine and belong to the person?	
Expiry date of permission to work, if any (diarise a follow-up check)	
Copy taken and stored? (Y/N)	
Checked by (name and signature)	

Keep a copy of the evidence for as long as the person works for you and for 2 years after they leave. If the employee has time-limited permission to work, diarise a follow-up check before it expires.

4. Payroll set-up form

Payroll details	
National Insurance number	
Tax code from P45 or starter checklist statement used (A, B or C)	
P45 received? (Y/N, attach)	
Student loan plan (1, 2, 4, 5 and/or Postgraduate)	
Pay frequency and payday	
Salary or hourly rate	
Pension status (auto-enrol / opt-in / not eligible)	
Bank account name, sort code and account number (store securely)	
Holiday entitlement	

Payroll admin (employer use)	
First FPS submitted (date)	
Added to pension provider (date)	
Payslip method (portal / email / paper)	

5. Probation review

Details	
Employee	
Role	
Start date	
Reviewer	

Review at 1 month	
Date	
What is going well	
What needs work	
Support and objectives agreed	
Outcome (continue / extend / end)	
Employee signature and date	
Manager signature and date	

Review at 3 months	
Date	
What is going well	
What needs work	
Support and objectives agreed	
Outcome (continue / extend / end)	

Employee signature and date	
Manager signature and date	

Review at end of probation	
Date	
What is going well	
What needs work	
Support and objectives agreed	
Outcome (continue / extend / end)	
Employee signature and date	
Manager signature and date	

Probation reviews should be fair and recorded. If you extend or end a probationary period, follow your contract and ACAS guidance.