

Beams Payroll Services Ltd



## REGISTRATION BOOKLET

This pack contains documents needed to complete registration, or for ongoing use of our Payroll or Managed Account Services.

*Please note that guidance and sample payroll documents are available in our **Information Booklet***

We Are Beams RCN: 1054129

Allsworth Court, 40 St David's Road, Hextable, Kent BR8 7RJ

Email: [payroll@wearebeams.org.uk](mailto:payroll@wearebeams.org.uk)

Telephone: 01322 610840

Web: [www.wearebeams.org.uk](http://www.wearebeams.org.uk)

Beams Payroll Services Ltd Company No: 15363977

Beams Payroll Services Ltd VAT Registration No: 460971086

# TO BEGIN USING OUR SERVICES

To register for, and use our Payroll or Managed Account Services we need some documents completed by you. The fastest way to register is to complete forms online. We have supplied links and QR codes, but also paper versions if you need those, so you can choose how to register.

You can choose to either:

- Click the 'here' links or scan the QR code provided within the pack to complete a document online
- Visit our website to find and then complete the documents online or print to post them to us
- Return the relevant forms in this pack by post, if you are unable to complete online, to:

**Beams Payroll Services Ltd, Allsworth Court, 40 St. David's Road, Hextable, Kent BR8 7RJ**

We need the documents listed, as required for your circumstances, to complete your registration:

| Document   | Location    | Completed ✓              |
|--|-------------|--------------------------|
| <b><u>These documents are to be completed by, or are for the attention of ALL Service users:</u></b>                                     |             |                          |
| 1. Terms and Conditions<br>Electronic form can be found <a href="#">here</a> , or a paper form if needed                                 | Pages 3-7   | <input type="checkbox"/> |
| 2. Privacy Notice<br>Electronic version can be found <a href="#">here</a> , or a paper version   | Pages 8-9   | <input type="checkbox"/> |
| 3. Data Protection Consent<br>Electronic form can be found <a href="#">here</a> , or a paper form if needed                              | Page 10     | <input type="checkbox"/> |
| <b><u>These documents are to be completed by our Service users who employ:</u></b>   |             |                          |
| 4. Employer Registration Form<br>Electronic form can be found <a href="#">here</a> , or a paper form if needed                           | Pages 11-12 | <input type="checkbox"/> |
| 5. Authorising your agent (HMRC form 64-8)<br>We will send you this document to complete and return to us                                |             | <input type="checkbox"/> |
| 6. Employee Starter Form ( <b>Employee</b> to complete)<br>Electronic form can be found <a href="#">here</a> , or a paper form if needed | Pages 13-16 | <input type="checkbox"/> |
| <b><u>These documents are to be completed by our Service users requiring a Managed Account:</u></b>                                      |             |                          |
| 7. Managed Account Service Agreement (if required)<br>Electronic form can be found <a href="#">here</a> , or a paper form if needed      | Page 17     | <input type="checkbox"/> |
| 8. HMRC Refund Form (if required)<br>We will send you a document to sign and return to us  |             | <input type="checkbox"/> |
| 9. BACS form (for Managed Account Service users only)<br>Electronic form can be found <a href="#">here</a> , or a paper form if needed   | Page 18     | <input type="checkbox"/> |

**For support with completing the forms, or any queries about our Payroll or Managed Account Services please call us on 01322 610840, or email [payroll@wearebeams.org.uk](mailto:payroll@wearebeams.org.uk)**

# 1. Terms and Conditions

## Beams Payroll Services Ltd



### Terms and Conditions

You can accept our Terms and Conditions online [here](#), which is the fastest way to give us this information, or you can send a completed agreement by post to: Beams Payroll Services Ltd, Allsworth Court, 38-40 St Davids Road, Hextable, Swanley, Kent BR8 7RJ

#### 1. **INTRODUCTION**

Beams Payroll Services Ltd (Company Number 15363977, VAT Registration Number 460971086) provide payroll and managed account services to Individual Employers, Small Business and Charities. You require us to deliver both, or either:

- Calculate amounts due and notify you of net pay, HMRC liability, Pension contribution and other associated deduction amounts. This service is known as 'Payroll'.
- Settle pay, HMRC liability, Pension Contribution, Invoices or associated expenses on your behalf, from funds we hold for you. This service is known as 'Managed Account'

In this agreement 'Employee(s)' means a person(s) employed by you and for whom we are providing payroll or managed account services to you.

This agreement will start when you submit your acceptance to our terms, either online or by post.

#### 2. **SERVICES**

2.1. For payroll service clients, we will calculate the wages due and any tax or other payments in respect of your Employee(s), notified to us by you. We will make those calculations using information that you provide to us.

2.2. We will only take instructions from people that you have authorised us to, and we will calculate from the information provided to us. You must confirm your authorisations in writing.

2.3. For payroll clients, we will agree how often you want us to process your payroll with you and what information you will need to send us to enable us to calculate the payments and liabilities.

2.4. For payroll service clients, when instructed, we will register for online filing as your agent with HMRC and instruct Revenue and Customs to communicate with us electronically.

2.5. We will provide the following services:

2.5.1. For each designated payment period we will calculate the payment due to each Employee, after statutory or required deductions, known as net pay. We will provide you with a pay slip for each Employee.

2.5.2 We will process payroll for your Employee(s) using the information you have provided to us. We are not responsible if the information you supply contains an error, when we have followed your instruction.

2.5.3. Each time we calculate your payroll, if you do not use our managed account service, we will send pay slips(s) and payment instructions to you that clearly set out the money due, so that:

(a) You can pay your Employee(s) and HMRC

(b) You will be informed of a Workplace Pension liability amount that we will enter on to your designated Workplace Pension Scheme, on your behalf, for each employee

**Note:** Managed account service employers will receive only a copy of the pay slip to check for accuracy and then provide to their employee.

2.5.4. If you are self-funding but have requested us to make payments on your behalf, you will be notified of the amount and date by which you must have made payment to us. You are responsible for making the required payment to us, in order that we can then pay your Employee(s), HMRC Workplace Pension liabilities or associated expenses. We will not be responsible for penalty charges or costs relating to late payment if we are unable to settle your liabilities on time due to late receipt of the required funds from you.

2.5.5 A P60 form will be provided for each Employee at year end.

2.5.6 We will securely store your payroll records and retain these for up to 6 years.

2.5.7 For clients requiring us to make payment of Invoices or expenses, from money we hold for you if this is sufficient, we will settle the full amount of an Invoice or expense claim when you submit it to us unless you clearly instruct us otherwise. **By submitting an Invoice or expense claim to us you authorise that the payment is to be made, and that you have checked the details of the Invoice for accuracy.**

2.5.8 We will investigate as a priority if you believe there has been an error in payments made by us, when a managed account service is provided. Adjustment will be established to either refund or pay incorrect amounts within 10 working days of us being notified of an error.

2.5.8 We will investigate as a priority if you identify to us a pay slip error. For example, if the hours reported to us by you were not accurately applied. Resolution will be established and we will ensure changes within 10 working days. This may mean a later pay adjustment for your Employee(s), but we will work together with you in managing this.

2.5.9 If you require us to upload a BACS form directly to your bank, on your behalf, we will send you details of payments to be made in advance of the funds being due to leave your bank account.

2.6 All reasonable care will be taken by us when providing these services to you, and we will ensure our skills are adequate to achieve all legal responsibilities.

### 3. **EMPLOYMENT**

3.1 You are the Employer of those who work for you, and for whom you are using our services to facilitate payroll in order to meet your legal obligations. Beams Payroll Services

Ltd will not take on the role of Employer as part of this agreement. Should we suffer any loss or damage as a result of anyone claiming that Beams Payroll Services Ltd are the Employer of your Employee(s) you will compensate us fully.

3.2 As the Employer, you accept that you will remain fully responsible for all legal obligations and responsibility towards your Employee(s)

3.3 By entering this agreement you confirm that you have obtained informed consent from your Employee(s) for their personal data to be shared with Beams Payroll Services Ltd in order that we can deliver the terms of this agreement.

3.4 For Direct Payment or Personal Budget clients, when you are required by Education, Health or Social Care to achieve satisfactory DBS clearance of your employee(s), you are responsible for ensuring this is in place before requesting for wages to be paid. Your funding body may refuse to cover these costs when DBS clearance has not been achieved, and if they do it will be your responsibility to pay for costs associated with support used that did not satisfy DBS requirements.

#### **4. RESPONSIBILITIES**

4.1 All reasonable care will be taken, by us, in the calculations of your payroll at the right time. We are not responsible for loss or expense that has been caused by receiving information from you, or those you authorise to notify us of your Employee(s) pay, too late to allow us to make the appropriate calculations in time for Employee(s) contractual pay date(s) or we have been provided with information that was inaccurate.

4.2 You are responsible for checking the pay slip(s) for your employee(s) within 24 hours of receiving the document(s) from us, and to notify us of identified errors **immediately** so that we can make any necessary adjustment without delay.

4.3 If you receive funding from Education, Health or Social Care we can only make payments from the amounts we have received, when you are using our managed account service. If the funding body fails to provide sufficient funds, or you use more support than the money covers it may result in your Employee(s), HMRC or Pension liabilities etc. not being paid, or being paid late. Any costs incurred by your breach of responsibilities or Employment contract relating to a lack of money in your managed account remains your responsibility.

4.4 If you self-fund we can only make payments from the amounts we have received, when you are using our managed account service. Failure to make payment to us in accordance with 2.5.4 may result in your Employee(s) not being paid, or being paid late. Any costs incurred by your breach of Employment contract relating to a lack of available money in your managed account remains your responsibility.

4.5 We cannot be held responsible for loss or expenses resulting from miscalculations we have made that are directly linked to incorrect or incomplete information from you, or those you authorise to notify us of your Employee(s) pay.

4.6 Where we suffer loss or damage as a result of any act or omission by you, or those you authorise to notify us of your Employee(s) pay, you will indemnify us for such loss or damage, including (but not limited to) situations where monies have been paid to an Employee(s).

4.7 Where you owe us money for services we have provided as part of our Agreement, we shall be entitled to offset that debt against money we hold for you, where you use our managed account service.

4.8 By using our Services you confirm that we are appointed as your agent, and are authorised to perform all administrative tasks necessary for the purpose of processing your payroll, managing your workplace pension responsibilities and dealing with any relevant third parties on your behalf, for example (but not limited to):

7.7.1 The Pensions Regulator, relating to your Pension scheme registration, compliance, declarations and statutory record keeping.

4.7.2 Your chosen Workplace Pension scheme, relating to the provision of a pension for Employee(s) for all purposes to comply with the scheme terms and conditions on your behalf.

4.7.3 HM Revenue and Customs (HMRC), with whom we will register online filing and instruct communications are electronic

## **5. ENDING THIS AGREEMENT**

5.1 Ending this agreement does not affect rights that you or Beams Payroll Services Ltd have on the date that it ends, including the right to be compensated for losses that either you or we have suffered and that is detailed within this agreement.

5.2 You, or we can end this agreement by giving sufficient notice (one month) to either end your employment status with HMRC or arrange transfer of your payroll service to a new provider. Deviation from this must be agreed between you and Beams Payroll Services Ltd.

## **6. CHARGES**

6.1 Charges are detailed in our Information booklet, available on our website or on request.

6.2 By entering this agreement you agree that you will pay our published charges, in line with the terms and conditions set out on our Invoice to you. Failing to pay your Invoice on time may incur penalty charges. These penalty charges will be detailed on our Invoice.

6.3 VAT (Value Added Tax) is payable on our service charges at the standard rate, and will be detailed clearly on our Invoice.

6.4 Increase to charges will be notified to you a minimum of 2 months before the increase commences so that you can choose, and have enough time, to end this agreement.

## **7. OTHER**

7.1 This agreement is between you and Beams Payroll Services Ltd and you may not pass on your rights and obligations under it to any other person, unless we have agreed in writing.

7.2 We shall not be required to deliver any of the services, or other duties, under this agreement if we are unable to, due to something outside of our reasonable control. Examples of possible scenarios are, but not limited to:

- Bank system breakdown
- Change of laws or government policies
- Extreme bad weather or acts of God
- Industrial disputes or strikes
- Riots or other civil commotion

7.3 You accept that this agreement sets out all the terms between us. Any previous agreements between us in relation to the services are superseded and you shall no longer be able to rely on those terms, whether in writing or word of mouth.

7.4 This agreement is made under English and Scottish Law. Any claims under this agreement can be made only in the English or Scottish Courts.

Signed by you, or on your behalf:

Print relationship or position if signing on behalf of the receiver of the service, and detail who you are signing on behalf of (Charity or Business name, or person the Education, Health or Social Care budget is paid for) if relevant

Print Name \_\_\_\_\_ Relationship/Position \_\_\_\_\_

On behalf of \_\_\_\_\_

Signed \_\_\_\_\_ Date \_\_\_\_\_



If you cannot complete the **Terms & Conditions** form online, from the link on page 2 or this QR code please complete it as a paper copy and return to: Beams Payroll Services Ltd, Allsworth Court, 40 St. David's Road, Hextable, Kent BR8 7RJ

## 2. PRIVACY NOTICE

# Beams Payroll Services Ltd



### Privacy Notice

#### We use your data to

Deliver our services to you, as mutually agreed, and as specified in our Terms and Conditions

#### How we obtain the personal information

Most of the personal information we obtain and process has been provided directly to us, by you, in one of the following ways:

- Electronic Forms (powered by Microsoft 365)
- Paper forms via our website, or post
- Email
- Telephone calls

Indirectly, we also receive personal information from other sources, for example:

- Care Agency
- HMRC
- Nest (Pension scheme)
- Local Authority
- NHS

#### The type of information we collect

To provide you with payroll or managed account services, the data we need might include:

- Personal details, including; Name, Date of Birth, Address, Telephone Number and Email Address
- The details of other people related to your need for payroll or managed account services, for example; A person appointed by you for support, your employees, professionals within the Local Authority or Health who have a legitimate interest in your Payroll (when there is a funded budget)
- If you have a funded budget, your bank account details
- Unique requirements relating to your payroll or managed account
- Client contact records (email / telephone communication details)
- Invoices and receipts
- Company or Charity details; Name, Address, Company Number, designated contact

## **How we store your information**

Beams Payroll Services Ltd store data electronically. All data is held securely and only employees have access to it. After we have saved data to electronic storage, paper copies containing personal information are destroyed.

## **Sharing of data we hold**

So that we can support you properly, we may need to share payroll information with partners who have a legitimate interest, as necessary to maintain and monitor the direct payment or personal budget. We will ask for your agreement but if you refuse it may restrict your ability to access funding. These may include;

- The local Authority who fund your Direct Payment
- Organisations under contract to the local authority to provide Direct Payment Support
- Insurance companies and Legal Advisors
- Organisations authorised by you for us to deal with

We will never share your data with a third party for commercial purposes.

## **Your data information rights**

You have the right to ask us for copies of your personal information.

- Your right to rectification - You have the right to ask us to rectify information you think is inaccurate. You also have the right to ask us to complete information you think is incomplete
- Your right to erasure - You have the right to ask us to erase your personal information in certain circumstances.
- Your right to restriction of processing - You have the right to ask us to restrict the processing of your information in certain circumstances.
- Your right to object to processing - You have the right to object to the processing of your personal data in certain circumstances.
- Your right to data portability - You have the right to ask that we transfer the information you gave us to another organisation, or to you, in certain circumstances.
- You are not required to pay any charge for exercising your rights. If you make a request, we have 28 days to respond to you.

Please contact us at [payroll@wearebeams.org.uk](mailto:payroll@wearebeams.org.uk) if you wish to make a data information request.

## **How to complain about use of your data**

You are entitled to complain in writing to Beams Payroll Services Ltd if you have reason to be unhappy with the way we have used your data, by at:

Allsworth Court, 38-40 St Davids Road, Hextable, Swanley, Kent BR8 7RJ

August 2025

### 3. Data Protection Consent Form

# Beams Payroll Services Ltd



## Data Protection Consent

This form can be completed online [here](#), which is the fastest way to register your preferences, or you can send us a completed form by post to: Beams Payroll Services Ltd, Allsworth Court, 38-40 St Davids Road, Hextable, Swanley, Kent BR8 7RJ

Beams Payroll Services Ltd takes your privacy seriously. We will only use your personal information to administer your account, and to provide the services you have requested from us.

To assist you with your responsibilities for account monitoring, if you have an Education, Health or Social Care budget, we can directly supply your support organisation with payroll records. This helps us to help you.

A copy of our Privacy Notice is available on our Website [here](#)

Please confirm if you agree for us to share payroll or managed account information with the organisation supporting you:

Yes, please share details to help me maintain and monitor the allocated budget

If you have selected yes, we will share information with the support organisation

No, do not share details (selecting this option may impact your ability to continue receiving a budget)

N/A, I do not use money provided by an Education, Health or Social Care budget

From time to time we would like to contact you with details of other new services, fundraising opportunities and events. If you consent to us contacting you, for this purpose, please tick to say how you would like us to contact you:

By Email  By Post

SIGNED \_\_\_\_\_ Date \_\_\_\_\_

FULL NAME \_\_\_\_\_

FULL POSTAL ADDRESS \_\_\_\_\_



If you cannot complete **Data Protection** form online, from the link on page 2 or this QR code please complete it as a paper copy and return to: Beams Payroll Services Ltd, Allsworth Court, 40 St. David's Road, Hextable, Kent BR8 7RJ

## 4. Employer Registration Form

Wholly owned by



# Beams Payroll Services Ltd

|   |                           |                                  |           |
|---|---------------------------|----------------------------------|-----------|
| Employer's Personal Details   | Miss, Mrs, Ms Mr, Other   |                                  |           |
|   | Forename(s)               |                                  |           |
|   | Surname                   |                                  |           |
|   | National Insurance Number |                                  |           |
| Employer's Address  | Building Number / Name    |                                  |           |
|   | Street                    |                                  |           |
|   | Town and County           |                                  |           |
|   | Post Code                 |                                  |           |
| Employer's Contact Details  | Email Address             |                                  |           |
|   | Landline Telephone Number |                                  |           |
|   | Mobile Telephone Number   |                                  |           |
| <b>We need to know if you are an Employer for Education, Health or Social Care needs. Please confirm:</b>     |                           |                                  |           |
| I employ for Education needs to be met  |                           | Yes / No (delete as appropriate) |           |
| I employ for Health needs to be met   |                           | Yes / No (delete as appropriate) |           |
| I employ for Social Care needs to be met  |                           | Yes / No (delete as appropriate) |           |
| I do not employ for care needs to be met  |                           | Yes / No (delete as appropriate) |           |
| <b>Who is paying for this employment? Kent County Council / NHS / Medway Council / Privately Funded by Me</b> |                           |                                  |           |
| <b>If you employ for meeting care needs, what is the name of the person you are managing the support for?</b> |                           |                                  |           |
|   |                           |                                  |           |
| <b>If you employ for meeting care needs, what is the name of your Support Advisor, if you have one?</b>       |                           |                                  |           |
|   |                           |                                  |           |
| <b>Please tell us the names and pay rates of all Employee's you would like us to set up on your behalf</b>    |                           |                                  |           |
| Name:   | Pay Rate:                 | Name:                            | Pay Rate: |
|   |                           |                                  |           |
|   |                           |                                  |           |
|   |                           |                                  |           |
|   |                           |                                  |           |
| <b>What frequency would you like for your Payroll?</b>  |                           |                                  |           |
| Weekly / 4 Weekly (this may be the option needed for care support) / Monthly / Other (delete as appropriate)  |                           |                                  |           |
| <b>Let us know if you are already registered as a PAYE employer (you already have Payroll)</b>                |                           |                                  |           |
| Yes, and will transfer to Beams Payroll Services Ltd / No, I am not registered (delete as appropriate)        |                           |                                  |           |
| <b>Transfer of Payroll Services from another provider (if required)</b>                                       |                           |                                  |           |
| What is your Employer's PAYE reference?   |                           |                                  |           |
| What is your Accounts Office reference?   |                           |                                  |           |
| Name and address of the existing Payroll Company?   |                           |                                  |           |
| Contact name for the existing Payroll Company   |                           |                                  |           |
| Phone number and Email for the existing Payroll Company   |                           |                                  |           |
| What is the next pay date for your employee(s)?   |                           |                                  |           |

If you cannot complete the **Employer Registration** from online form the link on page 2 or this QR code,



please complete it as a paper copy and return to: Beams Payroll Services Ltd, Allsworth Court, 40 St. David's Road, Hextable, Kent BR8 7RJ

## 6. Employee Starter Form is across the next 3 pages.

This form is only required if you are an employer

If your employee cannot complete this **Employee Starter Form** online, from the link on page 2 or this QR code,



please complete it as a paper copy and return to: Beams Payroll Services Ltd, Allsworth Court, 40 St. David's Road, Hextable, Kent BR8 7RJ



Tell your employer of your circumstances so that you do not pay too much or too little tax

Do not send this form to HM Revenue and Customs (HMRC)

### Instructions for employer

Use this starter checklist to gather information about your new employee if they do not have a P45. You can also use this form if they have a student loan (whether or not they have a P45). Use the information to help fill in your first Full Payment Submission (FPS) for this employee. If you have already submitted your first FPS, keep using the tax code in that FPS until HMRC sends you a new tax code. If the employee gives you their P45 after the first FPS submission, use the tax code shown in parts 2 and 3 of the P45. You must keep the information recorded on the starter checklist for the current and next 3 tax years. This form is for your use only.

### Instructions for employee

Fill in this form if you do not have a P45 (a document you get from your employer when you stop working for them). You should also fill in this form if you have a student loan (whether or not you've a P45). Give the completed form to your employer as soon as possible. They need this information to tell HMRC about you and help them to use the right tax code. Make sure you answer the questions correctly. If you do not, you may pay the wrong amount of tax or student loan deductions.

## Employee's personal details

1 Last name

2 First names  
Do not enter initials or shortened names for example, Jim for James or Liz for Elizabeth

3 What is your sex?  
As shown on your birth certificate or gender recognition certificate  
Male  Female

4 Date of birth DD MM YYYY

5 Home address  
  
  
  
Postcode  
  
Country

6 National Insurance number (if known)

7 Employment start date DD MM YYYY

## Employee statement

These questions will help you to choose the statement that matches your circumstances. The statement you choose helps your employer to apply the correct tax code.

**8 Do you have another job?**

Yes  Put an 'X' in the statement C box below

No  Go to question 9

**9 Do you receive payments from a State, workplace or private pension?**

Yes  Put an 'X' in the statement C box below

No  Go to question 10

**10 Since 6 April have you received payments from:**

- another job which has ended or any of the following taxable benefits
- Jobseeker's Allowance (JSA)
- Employment and Support Allowance (ESA)
- Incapacity Benefit

Yes  Put an 'X' in the statement B box below

No  Put an 'X' in the statement A box below

For more information about tax codes, go to [www.gov.uk/tax-codes](http://www.gov.uk/tax-codes)

| Statement A<br><input type="checkbox"/>   | Statement B<br><input type="checkbox"/>   | Statement C<br><input type="checkbox"/>  |
|---|---|--|
| Current personal allowance  | Current personal allowance on a Week 1/Month 1 basis  | Tax Code BR  |
| <p><b>Key</b></p> <p>This is my first job since 6 April and since the 6 April I have not received payments from any of the following:</p> <ul style="list-style-type: none"> <li>• Jobseeker's Allowance</li> <li>• Employment and Support Allowance</li> <li>• Incapacity Benefit</li> </ul>   | <p><b>Key</b></p> <p>Since 6 April I have had another job but I do not have a P45. And/or since the 6 April I have received payments from any of the following:</p> <ul style="list-style-type: none"> <li>• Jobseeker's Allowance</li> <li>• Employment and Support Allowance</li> <li>• Incapacity Benefit</li> </ul> | <p><b>Key</b></p> <p>I have another job and/or I am in receipt of a State, workplace or private pension.</p> |
| <p><b>Key</b></p> <p>Jobseeker's Allowance (JSA) is an unemployment benefit which can be claimed while looking for work.</p> <p>Employment and Support Allowance (ESA) is a benefit which can be claimed if you have a disability or health condition that affects how much you can work.</p> <p>Incapacity Benefit is help if you could not work because of an illness or disability before 31 January 2011.</p> <p>State Pension is a pension paid when you reach State Pension age.</p> <p>Workplace pension is a pension which was arranged by your employer and is being paid to you.</p> <p>Private pension is a pension arranged by you and is being paid to you.</p> <p>Please note that no other Government or HMRC paid benefits need to be considered when completing this form.</p> |   |  |

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## Student loans

**11 Do you have a student or postgraduate loan?**

Yes  Go to question 12

No  Go straight to the Declaration

**12 Do any of the following statements apply:**

- you're still studying on a course that your student loan relates to
- you completed or left your course after the start of the current tax year, which started on 6 April
- you've already repaid your loan in full
- you're paying the Student Loans Company by Direct Debit from your bank to manage your end of loan repayments

Yes  Go straight to the Declaration

No  Go to question 13

**13 To avoid repaying more than you need to, tick the correct student loan or loans that you have – use the guidance on the right to help you.**

Please tick all that apply

- Plan 1
- Plan 2
- Plan 4
- Postgraduate loan (England and Wales only)

Employees, for more information about the type of loan you have or to check your balance, go to [www.gov.uk/sign-in-to-manage-your-student-loan-balance](http://www.gov.uk/sign-in-to-manage-your-student-loan-balance)

Employers, for guidance on student loans and which plan or loan type to use if your employee has selected more than one, go to [www.gov.uk/guidance/special-rules-for-student-loans](http://www.gov.uk/guidance/special-rules-for-student-loans)

**You have Plan 1 if any of the following apply:**

- you lived in Northern Ireland when you started your course
- you lived in England or Wales and started your course before 1 September 2012

**You have Plan 2 if:**

You lived in England or Wales and started your course on or after 1 September 2012.

**You have Plan 4 if:**

You lived in Scotland and applied through the Students Award Agency Scotland (SAAS) when you started your course.

**You have a postgraduate loan if any of the following apply:**

- you lived in England and started your postgraduate master's course on or after 1 August 2016
- you lived in Wales and started your postgraduate master's course on or after 1 August 2017
- you lived in England or Wales and started your postgraduate doctoral course on or after 1 August 2018

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## Declaration

I confirm that the information I've given on this form is correct.

**Full name** Use capital letters

**Signature**

**Date** DD MM YYYY

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## Give this form to your employer

Your employer will use the information to make sure you pay the right amount of tax.

Do not send this form to HMRC.

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## Employer guidance

For information on how to work out your new employee's tax code, go to [www.gov.uk/new-employee-tax-code](http://www.gov.uk/new-employee-tax-code)

## 7. Beams Payroll Service Ltd Managed Account Service Agreement

# Beams Payroll Services Ltd



### Managed Account Service Agreement

I, \_\_\_\_\_ authorise Beams Payroll Services Ltd to receive payments from Kent County Council / NHS / self-funding (delete, as appropriate) on my behalf.

Beams Payroll Services Ltd are authorised to make payments relating to my Payroll and/or to settle Invoices or expenses on my behalf. (delete, as appropriate)

Invoices I supply to Beams Payroll Service Ltd for payment will have been checked by me for accuracy and compliance with HMRC guidelines. You can find what an Invoice must include on Gov.UK [here](#)

When I send an Invoice or expense claim to the managed account service I am authorising for payment to be made from funds held in my managed account.

This agreement remains in force until written confirmation of cancellation.

Signed \_\_\_\_\_

Name of the person the budget is for, if it is not you \_\_\_\_\_

Full Address \_\_\_\_\_

Post Code \_\_\_\_\_

Date \_\_\_\_\_



If you cannot complete the **Managed Account** form online, from the link on page 2 or this QR code,

please complete it as a paper copy and return to: Beams Payroll Services Ltd, Allsworth Court, 40 St. David's Road, Hextable, Kent BR8 7RJ

## 9. BACS Payment Form

Wholly owned by

# Beams Payroll Services Ltd



**Beams**  
Supporting disabled children & families

### BACS Payment Form

|                   |  |
|-------------------|--|
| Employers Details | Employers Name (this is your name)   |
|                   | Name of the person the Direct Payment / Personal Budget is for (if applicable) |

Please provide us with details of your Employee, so we can make payments to them on your behalf

|  |                            |
|--|----------------------------|
| Employees  | Miss, Mrs, Ms, Mr or Other |
| Personal Details   | Full Forename *            |
|  | Any Middle Names           |
|  | Surname *                  |
| * The full name for your Employee is required, not initials or shortened names |                            |

|                       |                               |
|-----------------------|-------------------------------|
| Employee Bank Details | Name as shown on Bank Account |
|                       | Name of Bank                  |
|                       | Sort Code                     |
|                       | Account Number                |

|   |
|---|
| Please provide any other relevant information here: |
|---|



If you cannot complete this **BACS** form online, from the link on page 2 or this QR code, please complete it as a paper copy and return to: Beams Payroll Services Ltd, Allsworth Court, 40 St. David's Road, Hextable, Kent BR8 7RJ