



**CUSTOMER SETUP DETAILS**

-----

-----

-----

-----

-----

***Cumbria Payroll Services Ltd***



# Cumbria Payroll Services Ltd

## CUSTOMER SETUP FORM NOTES

### Customer Details

The first section on page 1 is the details of the business, this is followed by Contact details. The contact details should be the person or persons who we are authorised to receive payroll processing instructions from and discuss the business payroll with.

### HMRC Details

If you are a new employer or do not have a PAYE scheme set up, indicate Yes on the New Employer setup required question and ignore the two reference lines.

If you are an existing employer please enter your HMRC accounts office reference and your PAYE reference on the appropriate lines.

### Payroll Details

Payment Method: Please indicate how you normally pay your employees.

Pay Cycle: Please identify if you pay your employees weekly, four weekly or Monthly. If you use any other period please write it down.

Pay Date: This is the date that will be printed on the Payslips i.e.: every Friday or last day of the month etc.

Number of employees: This should be the average number of employees paid in each payroll run.

Other Details: Please give any other details we need to know to process your payroll.

### Existing Employee Details

If you have printed details of your employee details these can be provided instead of completing our employee details forms.

Otherwise please complete our Existing Employee Details forms.

Please provide one page for each employee showing the details required.

If the processing service is to be taken over by us during the tax year, a P11 statement should be provided showing all payments made that tax year to date. If this is not available please contact us for further advice.

**If you require any help or advice on completion of the forms please call 01228 402010 and we will assist you with any queries you may have.**

**As soon as you have completed the set up forms please return them to us at:**

**Cumbria Payroll Services Ltd  
54 Warwick Road  
Carlisle  
Cumbria  
CA1 1DR**

**When we have received your forms and completed the setup process we will contact you to confirm setup is complete and we are ready to process your payroll.**

# Customer Details

**CPSL**

Business Name

Address

Postcode

Telephone

Facsimile

E-Mail

Co Registration no.

(If applicable)

## **Contact Details**

Name

Address

(if different from above)

E-Mail

(if different from above)

Telephone

(if different from above)

Mobile

(For emergency use only)

## **HMRC Details**

New Employer Setup required Yes/No or existing details below:

Accounts Office Reference

Employer PAYE Reference

/

## **PAYROLL Details**

Payment Method

Cash / Cheque / BACS / Credit Transfer

Payslip Method

Printed payslip / Sent by email

Pay Cycle

Weekly / 4 Weekly / Monthly

Pay Date

Number of employees

## **Other Details**



EXISTING EMPLOYEE DETAILS

Business Name

Surname

First name(s)

Title

Mr / Mrs / Miss / Ms / Other:

Address

Email Address

Date of Birth

Start Date

National Insurance No.

Job Title

Rate of Pay

£

per

Current Tax Code

Current year to date earnings as at:

/

/

No need to complete this section if services are required to start from week/month 1

Gross Pay

£

Tax Paid

£

Please provide a copy of the P11 statement showing earnings in this tax year.

Student Loan to be deducted

Yes / No

Pension Scheme Deductions

Yes / No

If yes, please provide details on a separate sheet.

Any other deductions to be made:

(CSA, council tax order etc.)

Other Information



Employers Details

Director 1/Partner 1/Sole Trader

First Names: \_\_\_\_\_

Surname: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

UTR (Unique Tax Reference):

National Insurance Number: 

--	--	--	--	--

Date of Birth \_\_\_\_\_

Director 2/Partner 2

First Names: \_\_\_\_\_

Surname: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

UTR (Unique Tax Reference):

National Insurance Number: 

--	--	--	--	--

Date of Birth \_\_\_\_\_

Director 3/Partner 3

First Names: \_\_\_\_\_

Surname: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

UTR (Unique Tax Reference):

National Insurance Number: 

--	--	--	--	--

Date of Birth \_\_\_\_\_