**Personal Details**

**Full Name** – Provide your legal name. This is the name required to be registered when you open your superfund

**Date of Birth** – Special rules apply to income earned by people under 18 years old. This can also be used as a basis in computing your superfund cap based on age

**Home Address** - your principal place of residence

**Home Phone** – Landline on your home address, if available, please provide

**Mobile Phone** – For easy communication. If you will be assigned as payroll administrator, codes to approve auto super payments will be sent through to your mobile phone

**Personal e-mail** – this is required for you to receive your payslip and group certificate, and for us to process payment for your super contribution

**Emergency Contact Name and Number** – your option to nominate a relative or friend that we can contact in case of emergency

**Tax File Number**

Ensure that you have your TFN even if you are a minor or working under a Visa.

Non-provision of TFN will result to higher tax being withheld from your salary.

If you do not have a TFN yet, please apply for one prior to starting your role with the company

**Questionnaire**

**Australian Resident for Tax purpose** – Non-Residents are taxed differently from Residents. If you are Tax Resident, you do not need to provide additional information. If you are Non-Resident and is working under a Visa, please provide us a copy of your Visa. We will notify you, through your provided email address herein, of the tax rates applicable to you.

**Tax Free Threshold** – This is claimed only if you are a Resident and you are employed with only one employer for the year. Or if your total income from all employers for the year will not be more than the tax-free threshold. Claiming Tax Free Threshold will yield to lower withholding tax from your salary on this employer. Should you claim this when you have other sources of income, you will have a bigger tax liability when you lodge your Individual Income Tax Return.

**Seniors and Pensioners Tax Offset** – you can only claim this if you only have one employer and you are claiming the tax-free threshold as well. Or you are a foreign resident. You will need to complete the Withholding Declaration (NAT 3093) for us to honor your claim. If you have more than one employer, please contact the ATO regarding your status. Claiming this offset will reduce the amount of tax being withheld from your salary

**Zone, Overseas Forces, Dependent Spouse or Dependent** – you can only claim this if you only have one employer and you are claiming the tax-free threshold as well. Or you are a foreign resident. You will need to complete the Withholding Declaration (NAT 3093) for us to honor your claim. If you have more than one employer, please contact ATO regarding your status. Claiming this offset will reduce the amount of tax being withheld from your salary

**Higher Education Loan (HELP) Debt** – You may opt to inform us of your outstanding HELP Debt so we may increase your withholding taxes to cover any compulsory repayments that maybe raise on your notice of assessment when you prepare your individual tax return

**Financial Supplement Debt** - You may opt to inform us of your outstanding HELP Debt so we may increase your withholding taxes to cover any compulsory repayments that maybe raise on your notice of assessment when you prepare your individual tax return

**Banking Details**

Please provide your bank account so we can set it up and have it ready should we do direct credit to accounts for salary payments

**Superfund Details**

**Industry Superannuation Fund** – If you have your Regulated Super Fund, please provide the details to us so we can pay the statutory rate contribution to your fund. Ensure that you provide the correct Membership number and USI to avoid payment to wrong account.

**Self-Managed Superannuation Fund** – if you set up your own Super fund, please provide us the Fund Name and other information relevant to your account

**Membership Number** – this can be found on your super fund statement or confirmed from your service provider

**USI** - You can obtain fund’s USI details from your service provider, the superannuation fund or via Super Fund Lookup in the ATO website by typing in the fund name or product name in the search box located in <http://superfundlookup.gov.au/Tools/DownloadUsiList>?

**SPIN** – if your trustee opted to operate the SPIN system, you can search for this number using the following link <https://www.apir.com.au/index/search/spin>

**ABN** – this is required for us to process payment to your SMSF. You can confirm this from your trustee

**Electronic Service Address** – An SMSF requires an electronic service address to receive data messages associated with employer contributions sent. You can request this from you SMSF administrator

**Pay Details**

This can be completed by your employer

**Annual Salary/Hourly Rate** – please provide the total salary per employment contract; indicate if you are noting a weekly, fortnightly or monthly salary

**Usual Weekly hours worked** – this is the number of hours the employee is expected to work; indicate if you have noted a different period other than weekly

**Date Employment commenced** – the first day the employee started working for the employer

**Payroll period payout** – Indicate if the employee is being paid monthly, weekly, fortnightly or a different period

**Allowance Entitlement** – Indicate if the employee will be receiving allowances so this can be set up in employee’s pay template

**Leave Accrual Eligibility** – Full time and part time employees are eligible to earn minimum 152 hours Annual leave and 76 hours Sick leave; please indicate if you would like us to set up the leave accrual in Xero

**Leave Loading Eligibility** -  this is an extra payment on top of an employee’s annual **leave** pay. It is usually 17.5% of the normal pay. The award, enterprise agreement or contract will state if you are entitled to **leave loading**. Not all employees are entitled to **leave loading**