

Personnel questionnaire

For workers with mini jobs or short-term employment

(Fields with a grey background are to be filled in by the employer)

Company

Name of the new employee

Personnel number

This personnel questionnaire is used to record personnel data for the DATEV payroll accounting programme as well as to register the employee. The completed personnel questionnaire is stored by the employer / payroll office in order to comply with the retention period.

Please note that registration can only take place on presentation of a **fully completed** questionnaire. Without registration, **no** payroll accounting can take place!

Personal data

Surname, maiden name as applicable	Given name		
Street and house number (incl. additional information)	Post code, city		
Date of birth	Gender	<input type="checkbox"/> male	<input type="checkbox"/> diverse
		<input type="checkbox"/> female	<input type="checkbox"/> undetermined
Insurance number (as per social security card)	Marital status	<input type="checkbox"/> single	<input type="checkbox"/> divorced
		<input type="checkbox"/> married	<input type="checkbox"/> widowed
Place, country of birth – <i>only if no insurance number exist</i>	Severely disabled	<input type="checkbox"/> yes	
		<input type="checkbox"/> no	
Nationality	IBAN		
	BIC		

Employment

Entry date	First day	Place of employment							
Description of profession		Job performed							
<input type="checkbox"/> Main employment	Probationary period		<input type="checkbox"/> yes	<input type="checkbox"/> no					
<input type="checkbox"/> Secondary employment	Duration of the probationary period:								
Highest level of education	<input type="checkbox"/> School leaving certificate or equivalent	Highest level of professional training	<input type="checkbox"/> Bachelor's degree						
	<input type="checkbox"/> Abitur / Fachabitur (equivalent of A levels in UK)		<input type="checkbox"/> Diploma / graduate degree / master's degree / state examination certificate						
	<input type="checkbox"/> No school leaving certificate Haupt / Volksschulabschluss (completion of secondary education)		<input type="checkbox"/> PhD						
			<input type="checkbox"/> No vocational training Officially recognized vocational training						
			<input type="checkbox"/> Master craftsman / technician / equivalent degree						
Holiday entitlement (calendar year)	Weekly working hours		Distribution of weekly working time (hrs.)						
			Mon	Tue	Wed	Thu	Fri	Sat	Sun
Cost centre & department number	Category of person								
Contract form:	<input type="checkbox"/> 1 - limited		<input type="checkbox"/> 2 - Unlimited						

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Employee name

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Fixed-term

<input type="checkbox"/> The employment relationship is fixed-term <input type="checkbox"/> Limited on purpose <input type="checkbox"/> Not limited in time	Fixed-term employment contract as of:
<input type="checkbox"/> Written conclusion of the fixed-term employment contract	Conclusion of employment contract on:
<input type="checkbox"/> Temporary employment is foreseen for at least 2 months, with prospect of continued employment	

Taxes – Information as per income tax card

Identification number	Lump sum <input type="checkbox"/> 2,00% <input type="checkbox"/> 20,00%	Tax class / factor
Child tax-free allowance	Denomination	Burden shifted to employee <input type="checkbox"/> yes <input type="checkbox"/> no

Social insurance

Health insurance <input type="checkbox"/> State <input type="checkbox"/> Private	Name of state / private insurer
DEÜV-status <input type="checkbox"/> 0 – no specification <input type="checkbox"/> 1 – spouse / cohabitant / descendant	
Employee- option for exemption from supplementary pension (according to § 6 para. 1 b SGB VI)	<input type="checkbox"/> Exemption from pension insurance Please be sure to submit your application for exemption!

Wages

Description	Amount	Valid from	Hourly wage	Valid from

Capital-forming benefits (VWL) – Only necessary if contract exists

Recipient	Amount	Employer share (monthly amount)
	Since	Contract number
IBAN	BIC	

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Information on additional employment

(for short-term employees also already terminated jobs from this calendar year)

Time period	Type of work
from: until:	<input type="checkbox"/> Mini job <input type="checkbox"/> Non-mini job employment <input type="checkbox"/> Short-term employment
from: until:	<input type="checkbox"/> Mini job <input type="checkbox"/> Non-mini job employment <input type="checkbox"/> Short-term employment

Does the aggregation of monthly wages result in more than EUR 520?

(Note for the employer: Check the assessment under social security law)

Yes

No

Declaration by the employee:

I affirm that the above information is correct. I undertake to inform my employer without delay of any changes, in particular with regard to further employment (in respect of type, duration and remuneration).

Date

Employee signature

Date

Employer signature

Date

For minors signature of
legal guardian

We are a tax consultancy whose offices are centrally located in the heart of Frankfurt am Main and were founded in Frankfurt in 1986.

Our tax consultants stand for the **highest quality of advice** and **perfect service** in all aspects of tax consultancy. Our tax advisors and employees with many years of experience provide you with competent support in all tax matters.

We mainly advise small and medium-sized enterprises, self-employed persons and freelancers **nationwide and internationally**. In tax matters, we support our clients from classic payroll and financial accounting to current tax returns and annual financial statements. In addition, we offer tax and business management advice.

The tax consultancy firm, Lübeck & Kollegen, Steuerberater GbR is a member of DATEV.

All about personnel:

Our tax consultants are keen to provide you with advice!

Whether individual advice or specially adapted staff contracts. Our experienced and knowledgeable team is always at your disposal.



We provide you with...

...a **qualified direct contact person** (own email address and telephone extension), **solution-oriented and holistic advice, prompt processing** of your questions and problems and all that in an **easy-to-understand language**.

Our service areas:

- Payroll accounting
- Financial accounting
- Financial statements
- Tax returns
- Business start-ups
- Business consulting

Do you need more information on the subject of
"Personnel questionnaire"?
Our competent tax advisors will be happy to support you!

Hotline: +49 (0) 69 - 242 66 20