

# 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

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<br><input type="checkbox"/> male <input type="checkbox"/> diverse<br><input type="checkbox"/> female <input type="checkbox"/> undetermined        |
| Insurance number (as per social security card)                    | Marital Status<br><input type="checkbox"/> single <input type="checkbox"/> divorced<br><input type="checkbox"/> Married <input type="checkbox"/> widowed |
| Place, country of birth – <i>only if without insurance number</i> | Severely disabled<br><input type="checkbox"/> yes<br><input type="checkbox"/> no   |
| Nationality   | IBAN<br>BIC  |

### Employment

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

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Company:

Employee name

Personnel number

## Fixed-term

|  |                                       |
|--|---------------------------------------|
| <input type="checkbox"/> The employment relationship is fixed-term /<br><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 %<br><input type="checkbox"/> 20,00 % | Tax class/factor   |
| Child tax-free allowance | Denomination   | Burdens 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<br><input type="checkbox"/> 0 – no specification<br><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"/> Versicherungsfreiheit in der Rentenversicherung<br><b>Please be sure to submit your application for exemption!</b> |

## 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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(employee is to leave grey fields blank)

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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:<br>until: | <input type="checkbox"/> Mini job<br><input type="checkbox"/> Non-mini job employment Short-term<br><input type="checkbox"/> employment |
| from:<br>until: | <input type="checkbox"/> Mini job<br><input type="checkbox"/> Non-mini job employment Short-term<br><input type="checkbox"/> employment |

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

Yes  No

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

## 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 minor 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**