

# Personnel Questionnaire

(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 <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 without insurance number</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 occupation <input type="checkbox"/> Secondary employment	Probationary period <input type="checkbox"/> yes <input type="checkbox"/> no Duration of probationary period: _____	
Do you have any other occupations? <input type="checkbox"/> yes <input type="checkbox"/> no		
Is this a marginal employment? <input type="checkbox"/> yes <input type="checkbox"/> no		
Highest level of education <input type="checkbox"/> School leaving certificate or equivalent <input type="checkbox"/> Abitur/Fachabitur (equivalent of A levels in UK) <input type="checkbox"/> No school leaving certificate <input type="checkbox"/> Haupt-/Volksschulabschluss (completion of secondary education)	Highest level of professional training <input type="checkbox"/> Bachelor's degree <input type="checkbox"/> Diploma/graduate degree/master's degree/state examination certificate <input type="checkbox"/> PhD <input type="checkbox"/> No vocational training <input type="checkbox"/> Officially recognized vocational training <input type="checkbox"/> Master craftsman/technician/equivalent degree	
Holiday entitlement (calendar year)	Weekly working hours <input type="checkbox"/> full time <input type="checkbox"/> part time	Distribution of weekly working time (hrs.) Mon Tue Wed Thu Fri Sat Sun
Cost centre	Department number	Group of persons
Contract form <input type="checkbox"/> Unlimited in full time <input type="checkbox"/> Fixed-term in full-time <input type="checkbox"/> Unlimited part-time <input type="checkbox"/> Fixed-term part-time		

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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	Tax class/factor	Child tax-free allowance	Denomination
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## Social insurance

Statutory health insurance	Parenthood <input type="checkbox"/> Yes <input type="checkbox"/> no
In the case of private health insurance: <b>additionally</b> last statutory health insurance fund	Children's data: Names and dates of birth
DEÜV status    0 - no indication 1 - Spouse / civil partner / descendant 2 - Managing Partner (GmbH)	

## 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 of taxable previous employment periods in the current calendar year** (these are time periods of employment accounted for on the income tax card)

Time period from	Time period to	Type of employment	Number of employment days

**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

\_\_\_\_\_

For minors Signature  
of the legal representative

\_\_\_\_\_

Date

\_\_\_\_\_

Employer signature

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 – 24 26 62-0**