

New Payee Pack

To enable us to create a record, we need you to complete the following forms as soon as possible. These forms are for people who are joining our payroll for the first time or re-joining the payroll after a gap in service; **please do not complete these forms if you are currently paid on our payroll and are taking up a new post elsewhere.** Please send us these forms, fully completed and **signed**, before you start on our payroll so we have your up to date details and your correct tax position. Please note we cannot always confirm receipt of these forms due to volume.

If you are over the State Pension Age please also send proof of your date of birth (i.e. copy of passport or birth certificate) for our files as you don't need to pay National Insurance.



CHURCH
COMMISSIONERS

Welcome to our Payroll

Payroll Services (Clergy Team) pay a stipend to most clergy and licensed layworkers in parochial appointments. We do not employ the clergy, but we are responsible for making statutory deductions in respect of PAYE tax and National Insurance.

My View

MyView enables you to view and print your pay and tax related documents, view your personal details and amend your bank details online. You will need your Unique Reference Number before logging on for the first time. Your Unique Reference Number will be sent to you on your first pay statement. If you have been paid on our payroll before the number will be the same.

Take a look at the MyView page on our website; there is also a step-by-step user guide with more detailed instructions on how to use the system and getting logged in.

<https://selfservice.churchofengland.org/dashboard/dashboard-ui/index.html#/landing>

Opting out of Paper statements

We would like to give you the option to opt out of receiving paper stipend documents and instead access your stipend documents securely online via MyView.

By opting out of receiving paper stipend documents, you will not be sent, via post, any monthly stipend statements, P60 certificates or P11D documents. All these documents will be available securely online via our self-service system MyView.

You will need your Unique Reference Number before logging on to MyView for the first time; your Unique Reference Number will be sent to you on your first pay statement, hence this has to be sent in the first instance via post. If you do wish to opt out of paper stipend documents once you receive this statement, please log onto MyView at <https://selfservice.churchofengland.org> and follow the link for 'Opting Out of Paper Stipend Documents' on the left-hand side.

We need to ask you to complete an online form which formally confirms that you do not wish to receive paper stipend documents and that you have the necessary facilities to be able to regularly access your online documents. Once this form has been submitted, you will receive an email, to the email address we hold on record, to confirm your change has been successful. If your circumstances change, and you are no longer able to access your online stipend documents regularly, you will be able to opt back into receiving paper stipend documents.

Information on how you can sign into MyView is available on our website www.clergypay.org Full instructions are available to help you log in for the first time and there is a dedicated email address (myviewenquiries@churchofengland.org) if you do have any problems.

Unless you log onto MyView, complete and submit the online form to opt out, you will continue to receive paper stipend documents via post. However, please note that even if you continue to receive paper stipend documents you can still access these documents online via MyView.

Information available from our website

Please visit our website at www.clergypay.org which contains the most up to date information regarding:

Statutory Sick Pay

The Heating, Lighting and Cleaning Scheme (HLC)

Parental Benefits

Payroll Giving

Help with Childcare Costs

Contact the Payroll Services (Clergy Team)

If you have any stipend related queries, please do not hesitate to contact us (quote your Unique Reference Number on all correspondence)

Payroll Services (Clergy Team)

Church House

Great Smith Street

London

SW1P 3AZ

Email: clergy.payments@churchofengland.org

Telephone: 020 7898 1618

Clergy Payroll Privacy Notice

The privacy of clergy is very important to us. So is the security of their data. The following information is included so that clergy whose information is stored on the Church Commissioners Clergy Payroll may be aware of what data we collect and how we use that data. In addition, there is information on their rights as a data subject and the people they should contact if they have any queries.

What data we collect and why

The Church Commissioners and Church of England Central Services will collect and hold personal data including your name, national insurance number, date of birth, clerical appointment details, contact details, bank account detail and stipend amount to fulfil our lawful purpose:

- To pay you a stipend on behalf of your funding body and to report the necessary costs to that funding body.

Additional Information

Certain aspects of your data are also shared, as follows, to perform a specific administrative function:

- Your name, contact information and clerical appointment details are shared with Crockford's to allow them to fulfil their primary purpose to maintain an up to date record of your appointment(s) on the Crockford database. This does not mean that you have consented to any of your details being published in Crockford's Clerical Directory (either online or in paper print). Please see their separate privacy notice.
- Your name, national insurance number, contact information and stipend details are shared with the Church of England Pensions Board to enable them to fulfil their primary purpose to administer your pension record. Please see their separate privacy notice.

Individual Rights

Unless subject to an exemption under Data Protection law, you have the following rights with respect to your personal data: -

- The right to request a copy of your personal data which we hold about you;
- The right to request that we correct any personal data if it is found to be inaccurate or out of date;
- The right to request your personal data is erased where it is no longer necessary for us to retain such data;
- The right, where there is a dispute in relation to the accuracy or processing of your personal data, to request a restriction is placed on further processing;
- The right at any time to withdraw your consent to our processing of your personal data;
- The right to lodge a complaint with the Information Commissioner's Office.

Important Contacts

The Church Commissioners and Church of England Central Services are joint data controllers of any personal information provided to or gathered by the Clergy Payroll Team. If you have any questions about this privacy policy, including any requests to exercise your legal rights, please contact our Data Protection Officer at gdpr@churchofengland.org or the following address:

Church Commissioners/Church of England Central Services
Church House
Great Smith Street
London SW1P 3AZ

In any event you have the right to make a complaint at any time to the Information Commissioner's Office (ICO), the UK supervisory authority for data protection issues. The ICO can be contacted on their helpline number which is 0303-123 1113 or by other contact methods as set out on their website (www.ico.org.uk).

Frequently Asked Questions about Tax

When do I need to complete the New Payee Tax form?

Please complete this form as soon as possible so we know which tax code to use for your first stipend payment. Please aim to complete this form in the first week of the month you are being licensed in your stipendiary appointment (i.e. if you are being licensed on 29 June please complete this form by the end of the first week in June).

I am not sure which statement applies to me, which box should I tick?

We cannot tell you which box to tick. Please tick the box that best applies to your own personal circumstances. If you tick more than one box, or leave every box blank, the form will be void and we will have to tax your stipend at 20% using a tax code of OT. We will let HM Revenue and Customs know when you start on the payroll and they will review your coding.

Will I need to complete a tax return?

As a Minister of Religion paid through the Commissioners payroll you will need to complete a Ministers of Religion tax return for HM Revenue and Customs at the end of each tax year. If you were on the payroll during the last tax year and have not received a tax return please contact HM Revenue and Customs using the details at the end of this page.

When will I need to complete a tax return?

We recommend that you complete your tax return as soon as possible. The final deadline for a paper return is 31 October. You can submit your return online up to 31 January, **however**, you would need to either purchase special software to enable you to complete the Ministers of Religion pages online *or* use a tax agent that uses such software.

What information do I need to complete my tax return?

At the end of the tax year we will send you a P60 certificate and where applicable a P11D statement of benefits; you will need to declare this information on your tax return. You will also be able to access these documents, once available, via our online MyView service. We produce notes in good faith to help you complete the tax return, which you will be able to access via our website; you should use these in conjunction with the notes produced by HMRC. Please see the dedicated page on our website for other information you will need.

Who can I contact if I need help or if I have a query in relation to my tax coding?

Your tax affairs will be dealt with by HM Revenue and Customs at:

HM Revenue & Customs, Public Department 1
Ty Glas Road, Llanishen, Cardiff, CF14 5XZ

Telephone number: 03000 534720.

The Commissioners' PAYE Reference is 940/LA73776

We (the Payroll Services Clergy Team) are not qualified to offer tax advice nor are we in a position to deal with individual tax affairs. If you do need advice, you should seek it from a qualified professional who is experienced in clergy taxation. We regret that we are unable to recommend any advisor/s and suggest that you seek personal recommendations from your clergy colleagues.

New Payee Tax Form

The Church Commissioners must let the tax office know we are paying you. We also have to work out which tax code to use. If we do not receive this form back from you in time we will have to tax your stipend initially at 20% using a tax code of OT. HM Revenue and Customs will then review your coding.

Please complete your details		Date of Licensing:	
National Insurance number:		Title:	
First name(s):		Surname:	
Date of Birth:		Diocese:	
E-mail address:			
New address:			

Please read all the following statements carefully and tick the one box that will apply to you when you first start your paid appointment. If you have a P45 (for this tax year) please attach parts 2 and 3 to this form, you should keep part 1A for your own records.

- | | | |
|--|--------------------------|---------------------------------|
| <p>A. This is my first job since last 6 April and I have not been receiving taxable Jobseeker’s Allowance or taxable Employment & Support Allowance or a state or occupational pension.</p> | <input type="checkbox"/> | Tick <u>one</u> box only |
| <p>B. This is now my only job or pension, but since last 6 April I have had another job, or have received taxable Jobseeker’s Allowance or Employment & Support Allowance. I do not receive a state or occupational pension.</p> | <input type="checkbox"/> | |
| <p>C. I have another job or receive a state or occupational pension</p> | <input type="checkbox"/> | |

Student/Post Graduate Loans (advanced in the UK)

- i. Do you have a student/ Post graduate loan that is not fully repaid?
- a. YES please continue to question ii below.
 - b. NO you do not need to answer any further questions please sign the declaration.
- ii. Are you repaying your Student/Post graduate Loan directly to the Student Loans Company by agreed monthly instalments(I.e. via direct debit)?
- a. YES you do not need to answer any further questions please sign the declaration.
 - b. NO please complete the Student Loan Declaration form attached

DECLARATION: I can confirm that this information is correct

Signed:

Date:

Student/Post Graduate Loan Declaration

Student Loans (advanced in the UK)

- i. What type of Student Loan do you have? **If you don't know please contact the Student Loans Company or refer to your loan agreement and associated paperwork. If you have declared that you have an outstanding loan to be repaid and you don't tick either box a or b below then Plan Type 1 will be assumed.**
- a. Plan Type 1 (loans issued before September 2012)
- b. Plan Type 2 (loans issued after September 2012)
- ii. Did you finish your studies before last 06 April?
- a. YES
- b. NO

Post Graduate Loans (advanced in the UK)

- i. Do you have a Postgraduate Loan which is not fully repaid?
- a. YES
- b. NO
- ii. Did you finish your studies before last 06 April?
- a. YES
- b. NO

DECLARATION: I can confirm that this information is correct

Signed:

Date:

Student / Post Graduate Loan FAQ:

Student Loan Plans

You'll have a Plan 1 Student Loan if:

- you lived in Scotland or Northern Ireland when you started your course (undergraduate or postgraduate)
- you lived in England or Wales and started your undergraduate course before 1 September 2012

You'll have a Plan 2 Student Loan if:

- you lived in England or Wales and started your undergraduate course on or after 1 September 2012
- your loan is a Part Time Maintenance Loan
- your loan is an Advanced Learner Loan
- your loan is a Postgraduate Healthcare Loan

Post Graduate Loan Plans

You'll have a Postgraduate Loan if:

- you lived in England and started your Postgraduate Master's course on or after 1 August 2016
- you lived in Wales and started your Postgraduate Master's course on or after 1 August 2017
- you lived in England or Wales and started your Postgraduate Doctoral course on or after 1 August 2018

HLC Terms and Conditions

Under arrangements agreed with HM Revenue & Customs (HMRC), part of your stipend may be paid free of tax and National Insurance in reimbursement of heating, lighting, cleaning and garden upkeep costs. This is commonly known as the HLC allowance.

Conditions that must be met

You must occupy, rent-free, an official house provided by the Church of England (or a charity) for duties which are full-time.

You must incur the costs only on heating, lighting, cleaning or garden upkeep in those parts of the property which are used for official purposes and/or occupied by you or your family.

Cost covered under the Scheme

- **fuel** (gas, electricity, oil, coal, wood, petrol etc.)
- **materials** (polish, dusters, cleaning products etc.)
- **servicing** (overhaul of central heating, vacuum cleaner, lawnmower etc.)
- **repairs** (including replacement of life-expired equipment on a like-for-like basis)
- **wages** (payments to a cleaner or gardener)

Important notes

The scheme **does not** cover capital costs (machinery, new or improved equipment, garden or home improvements, furniture, sheds, garden plants etc.) or depreciation.

You will need to factor in an amount for your personal costs (cooking, laundry etc) and deduct this from the total. Some energy companies have online tools which will help you to estimate these costs. ***Please note we cannot advise you on how much to factor in for personal costs.***

Wages may include payments made to a relative provided you can prove that they are commercially reasonable and have been made.

Claiming an HLC allowance

If you meet the conditions listed above, calculate what you expect to spend on such running costs in a full year and complete the form overleaf.

Do not complete this form if you do not meet these conditions. You may, however, be able to claim your work-related costs as a “study allowance” on your next tax return.

Payment of the HLC allowance

We will use these figures to make provisional HLC payments to you. At the end of the year we will ask you to tell us how much your actual costs were. We will then make any necessary adjustments to these provisional payments.

Please note: HLC payments are not additional payments. They are a reclassification of part of your existing stipend which reduces your tax liability and National Insurance contributions.

The HLC allowance is viewed as a service benefit by HMRC because you can claim for the whole of your property. You will still get tax relief on at least the work-related proportion of your costs (declared on your tax return) and will save National Insurance on the whole amount.

For more information on the scheme and tax on service benefit please visit our website www.clergypay.org.

HLC Estimate Form

Please return this **signed** form to: Payroll Services (Clergy Team), Church House, Great Smith Street, London, SW1P 3AZ

Please read the notes below and complete this form to show the **annual** running cost you expect to incur at your official residence.

Your details (after ordination/taking up new post)

National Insurance no: or Unique Reference no		Title:	
Christian names:		Surname:	
Diocese:		New Address:	

I confirm that I have read the notes which accompany this form, and that I occupy, rent free, an official house provided by the Church of England (or a charity) for duties which are full time.

I estimate my annual rate of expenditure at this official house will be:

	£ (whole)
A Heating & Lighting	
B Cleaning	
C Garden upkeep	
D Sub Total (A plus B plus C)	
E Amount to be reimbursed (e.g. by your PCC)	
F Total (D minus E)	

Signed		Date:	
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Please take a copy for your records and return this form to

Payroll Services (Clergy Team), Church House, Great Smith Street, London, SW1P 3AZ

For office use
Date of effect

Processed

Crockford's Clerical Directory

Church House, Great Smith Street, London SW1P 3AZ

Please use this form to provide us with the information we require to maintain a record within the *Crockford* database and, where applicable, an entry in *Crockford's Clerical Directory* (our printed publication and the subscription service at: www.crockford.org.uk).

Please read the notes overleaf, and complete the form in BLOCK CAPITALS. If you do not wish for your biography to be published in the public domain, please complete the relevant section from our Data Protection Notice and return this to us as soon as possible.

1. Your Details:

Surname		Title (see note c)	
Christian names (see note a)		Gender (please circle)	M F
Alternative name (see note b)		Date of birth	D D M M Y Y
Postal address (after ordination)		Date ordained Deacon	D D M M Y Y
		Date ordained Priest	D D M M Y Y
	Postcode	Date Consecrated	D D M M Y Y
E-mail			
Tel	Mobile	Fax	

2. Education:

Awarding body	College	Qualification	Year awarded
Honours/decorations (with dates)		Others (with dates)	

3. Theological training:

Year of entry	College/Course	Qualification	Year awarded

4. Appointments held since ordination (including licence/permission to officiate and year of retirement):

From	To	Appointment	Diocese

I confirm that the information given on this form is correct to the best of my knowledge

Signed _____ Date _____

NOTES

Christian names: please indicate any preferred name.

Alternative name: this can be a maiden name, a name 'in religion', or a name used in preference to a Christian name.

Title: clergy are requested to indicate their preferred style of address – Mr/Mrs/Miss/Ms/Dr/Prof.

Others: refers to professional qualifications and membership of professional, learned or religious societies.

Abbreviations: please use full title and recognised abbreviation for non-standard information.

Data Security: the Archbishops' Council will collect and hold your name, contact details, date of birth, clerical appointment details and such other biographical data as are required to maintain the *Crockford* database. Please refer to our Privacy Notice (form S187) for further details.

Please continue to keep us informed of changes of appointment and address and any other information that will assist us in keeping your *Crockford* entry up to date.

Please return the completed form to:

Crockford's Clerical Directory
Church House
Great Smith Street
London
SW1P 3AZ

If you have a query about this form, please contact the *Crockford* Department.
Tel (020) 7898 1012 E-mail crockford@churchofengland.org



Privacy Notice

The privacy of clergy is very important to us. So is the security of their data. The following information is included so that clergy whose information is stored on the Crockford database may be aware of the data we collect and how we use it. In addition, there is information on their rights as data subjects and the people they should contact if they have any queries.

What data we collect, and why

The Archbishops' Council will collect and hold your name, contact details, date of birth, clerical appointment details and such other biographical data as are required to fulfil our primary purpose, viz.

A. To maintain an up-to-date record of your appointment(s) on the Crockford database.

Your data may also be used for the following purposes, but only with your permission:

B. To include, where applicable, a biographical entry for you in

1. *Crockford's Clerical Directory* in printed form;
2. *Crockford's Clerical Directory* on the Internet;

C. Occasional use by the Archbishops, Archbishops' Council, Church Commissioners and Pensions Board (for example, mailing of their Annual Reports, communications from Boards or Councils, surveys regarding the Church's life);

D. Mailings by other (principally church-based) organisations that may be of interest to clergy.

Providing consent

We may not and will not use your data for purposes B, C or D without receiving your permission. It is important to note that if we do not receive such consent relating to purpose B, then your biographical information will not appear in the *Crockford's Clerical Directory*.

Please fill out the form below and return it to the address provided to inform us of your wishes regarding the use of your data.

Please note that, even if you are happy for your biographical entry to appear in the *Crockford's Clerical Directory*, you can still request that certain contact information or your date of birth be excluded from publication. In such cases, please inform the Crockford team at crockford@churchofengland.org

This notice continues overleaf.

Please return this slip to the address at the foot of this page to inform us of your wishes regarding the use of your data			
please tick the relevant box(es)		PLEASE USE BLOCK CAPITALS	
B1.	I give consent for my biography to appear in <i>Crockford's Clerical Directory</i> (printed book) <input type="checkbox"/>	Full Name:	<input style="width: 95%;" type="text"/>
B2.	I give consent for my biography to appear in <i>Crockford's Clerical Directory</i> on the Internet <input type="checkbox"/>	Address:	<input style="width: 95%;" type="text"/>
C.	I give my consent to receive occasional mailings by the National Church Institutions <input type="checkbox"/>	<input style="width: 65%;" type="text"/>	Telephone: (for any queries) <input style="width: 30%;" type="text"/>
D.	I give my consent to receive third party mailings <input type="checkbox"/>	Signed:	Date: <input style="width: 40%;" type="text"/>
Additional information may be entered below:			

Return this form to: The Compiler, Crockford, Church House, Great Smith Street, London SW1P 3AZ.

Important Contacts

The Archbishops' Council is the primary data controller of any personal information provided to, or gathered by, Church House Publishing. The address is:

Archbishops' Council
Church House
Great Smith Street
London SW1P 3AZ

If you have any questions about this privacy policy, including any requests to exercise your legal rights, please contact:

Martin Kettle
Mission and Public Affairs Division
Archbishops' Council
Church House
Great Smith Street
London SW1P 3AZ

If you find a need to pursue the matter further, please contact our Data Protection Officer at gdpr@churchofengland.org

In any event, you have the right to make a complaint at any time to the Information Commissioner's Office (ICO), the UK supervisory authority for data protection issues. The ICO can be contacted on their helpline number which is 03031-231113 or by other contact methods as set out on their website (www.ico.org.uk).

Individual Rights

Unless subject to an exemption under Data Protection law, you have the following rights with respect to your personal data:

- The right to request a copy of your personal data which we hold about you (typically this will be name, contact details and if you've chosen to provide it, denomination);
- The right to request that we correct any personal data if it is found to be inaccurate or out of date;
- The right to request your personal data is erased where it is no longer necessary for us to retain such data;
- The right, where there is a dispute in relation to the accuracy or processing of your personal data, to request a restriction is placed on further processing;
- The right at any time to withdraw your consent to our processing of your personal data;
- The right to lodge a complaint with the Information Commissioner's Office.

If you have completed the slip overleaf, please return this to:

The Compiler
Crockford's Clerical Directory
Church House
Great Smith Street
LONDON SW1P 3AZ