

Personnel questionnaire

for workers with mini jobs or short-term employment
(employee is to leave grey fields blank)



Company:

Employee name

Personnel number

Dieser Personalfragebogen dient zur Vorerfassung von Personaldaten für das DATEV-Lohnabrechnungsprogramm. Zur Wahrung der Aufbewahrungsfrist wird der ausgefüllte Personalfragebogen von dem Arbeitgeber / der lohnabrechnenden Stelle gespeichert.

Personal data

| | | | |
|---|--|---|--|
| Surname, maiden name as applicable | | Given name | |
| Maiden name as applicable | | Date of birth | |
| Street and house number (incl. additional information) | | Post code, city | |
| Insurance number (as per social security card) | | Gender <input type="checkbox"/> Male <input type="checkbox"/> Diverse <input type="checkbox"/> Female <input type="checkbox"/> Undetermined | |
| Place of birth | | Country of birth | |
| Nationality | | Employee number, pension fund – construction | |
| Severely disabled <input type="checkbox"/> Yes <input type="checkbox"/> No | | | |
| Bank account number (IBAN) <input type="checkbox"/> Cash payment | | Sort code/bank ID (BIC) | |

Employment

| | | | |
|---|----------------------------|--|--|
| Date employment contract begins | First day | Place of employment | |
| Description of profession | | Job performed | |
| Education <input type="checkbox"/> Volksschule/Hauptschule (completion of secondary education) <input type="checkbox"/> Abitur (equivalent of A levels in UK) <input type="checkbox"/> Technical school/university <input type="checkbox"/> University degree | | Professional training <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Holiday entitlement (calendar year) | Weekly/daily working hours | Employed in construction industry since | |
| Cost centre | Department number | Person group | |

Status at beginning of employment

| | | |
|---|---|--|
| <input type="checkbox"/> Employee | <input type="checkbox"/> School pupil | <input type="checkbox"/> University applicant |
| <input type="checkbox"/> Employee on parental leave | <input type="checkbox"/> Unqualified | <input type="checkbox"/> Military/social service |
| <input type="checkbox"/> Unemployed | <input type="checkbox"/> Self-employed | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Civil servant | <input type="checkbox"/> Student | |
| <input type="checkbox"/> Housewife/househusband | <input type="checkbox"/> Social welfare recipient | |

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Taxes – Information as per income tax card

| | | | |
|-------------------------------------|-----------------------------------|-----------------------|--|
| Official Municipality/community key | Tax office number | Identification number | |
| Tax class/factor | Number of exemptions for children | Denomination | 2% flat tax <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 |
| Accident insurance risk tariff | DEÜV-status |
| <p>For workers with mini jobs only: option for increasing pension insurance payments (§ 5, para. 2, no. 2 Social Security Code (SGB VI))</p> <input type="checkbox"/> Refuse pension-insurance option <input type="checkbox"/> Exercise pension-insurance option (waive pension-insurance exemption) | |

Compensation

| Description | Amount | Valid from | Hourly wage | Valid from |
|-------------|--------|------------|-------------|------------|
| | | | | |
| | | | | |

Capital-forming benefits (VWL) – only required if contract is at hand

| | | |
|----------------------------|-------------------------|---------------------------------|
| Recipient | Amount | Employer share (monthly amount) |
| | Since | Contract number |
| Bank account number (IBAN) | Sort code/bank ID (BIC) | |

Information on additional employment

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

| Time period | Employer | Type of work | Weekly hours |
|-------------|----------|---|--------------|
| | | <input type="checkbox"/> Mini job <input type="checkbox"/> Non-mini job employment <input type="checkbox"/> Short-term employment | |
| | | <input type="checkbox"/> Mini job <input type="checkbox"/> Non-mini job employment <input type="checkbox"/> Short-term employment | |

Is the legal income border adhered to, if all monthly income is added up?

(Note for employer: verify social security evaluation)

Yes No

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Employment documents

| | | |
|---|------------------------------------|--|
| • Employment contract | <input type="checkbox"/> At hand | <input type="checkbox"/> Included |
| • Income tax card/number of days employed at previous employer(s) | No. of days employed | <input type="checkbox"/> Included |
| • Social insurance ID | <input type="checkbox"/> Presented | <input type="checkbox"/> Copy included |
| • Application for exemption from pension insurance | <input type="checkbox"/> At hand | <input type="checkbox"/> Included |
| • Certificate of private health insurance | <input type="checkbox"/> At hand | <input type="checkbox"/> Included |
| • Capital-forming benefits (VWL) contract | <input type="checkbox"/> At hand | <input type="checkbox"/> Included |
| • School/university certificate | <input type="checkbox"/> At hand | <input type="checkbox"/> Included |
| • Severely disabled ID | <input type="checkbox"/> Presented | <input type="checkbox"/> Copy included |
| • Pension fund documents construction/painting | <input type="checkbox"/> At hand | <input type="checkbox"/> Included |

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 | | |