

Personnel questionnaire

part-time and full time employees

Employer (Stamp)	Permanent establishment (city)	Cost center	Employee group for financial accountings
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1**Personal data**

Entrance date

Family name			
Maiden name			
First name			
c/o			
Street and No.			
Postcode, City			
Date of birth		Place of birth	
Gender	<input type="checkbox"/> male	<input type="checkbox"/> female	<input type="checkbox"/> divers
Nationality			
Marital status		Number of children	
Phone number			
Tax identification number			mandatory also for mini-jobs
number Social security			
Duration	<input type="checkbox"/> unlimited	limited until	
Employment	This employment is my:		
	<input type="checkbox"/> 1st employer (main employment)	<input type="checkbox"/> secondary employment	
	Marginal employment (mini-job)	yes <input type="checkbox"/> no <input type="checkbox"/>	
	I have an additional employment besides this employment that is fully subject to social security contributions.	yes <input type="checkbox"/> no <input type="checkbox"/>	
	If yes, at		
	Company, address	Monthly salary	

2**Bank details**

IBAN	
BIC	
Bank institute	
Alternative account holder	

3

Work / level of education

Job specification

Graduation without qualification Secondary school Intermediate school Higher education

Professional education without qualification recognized vocational training "Meister"/ equivalent qualification

Bachelor Dipl./Magister/Master/ State examination PhD/Dr.

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Health insurance / pension fund

I am insured by a public insurance company.

Complete name of public insurance company

I am insured voluntarily by a public insurance company.

I am paying the contributions to the statutory health insurance by myself.

Complete name of public insurance company

I am insured by a private insurance company.

Complete name of private insurance company

The contract of the private health insurance includes sickness benefits.

The contract of the private health insurance does not include sickness benefits.

The contributions to the statutory pension insurance and unemployment insurance are paid to the following public health insurance company:

The contributions to pension insurance are not paid to the statutory pension insurance, but to

Pension fund (Versorgungswerk)

Member number pension fund

The assessment for exemption from statutory pension insurance for this employment issued by Deutsche Rentenversicherung is available at the start of this employment.

I am paying the contributions to the pension fund by myself.

5 Status at the beginning of employment (multiple entries possible)

- I am not obliged to pay pension insurance contributions (please hand in a copy of the latest certificate of the pension insurance organization).
- Besides this employment, I am self-employed and I will remain self-employed during this employment. I will inform my health insurance company about all my income to determine the correct contributions. Additionally, I will initiate an audit at the health insurance company to determine my main activity from social security perspective.
- I receive a pension (please hand in a copy of the pension approval certificate).
Retirement start:
- I am spouse, registered partner or child of the employer.
- I am managing director and shareholder of the GmbH / UG.
- I only have a temporary work permission (please hand in a copy of the permission).
- I only have a temporary residence permission (please hand in a copy of the permission).
- I am a pupil (please hand in a valid certificate).
- I am a promotion student (PhD/Dr.) (Please hand in a valid certificate).
(In this case a treatment as so called Werkstudent is excluded.)
- I am a student.
Please hand in continually the actual confirmation of matriculation. I will inform my employer in written form leaving the social security status as student after preparing my final thesis / last examination. From that date a treatment as so called Werkstudent is excluded.
 - Currently, I am in a semester of leave.
(In this case a treatment as so called Werkstudent is excluded.)
- I will inform my employer immediately if I plan to take a semester of leave in the future.
- The employment is an internship, which is mandatory for the graduate program of the university.
(Please hand in an official statement of the study regulations)
 - Mandatory internship before the start of studying
 - Mandatory internship while studying
 - Mandatory internship after the end of studying
 - Mandatory internship between two study sections (Bachelor/Master)
- I receive unemployment benefit I (Please check supplementary income limits.)
- I receive unemployment benefit II (Please check supplementary income limits.)
- I am severely handicapped and I have a degree of disablement of at least 50%.
(Please hand in a valid certificate.)

6 Tax classification

Tax office	<input type="text"/>	Tax class	I <input type="checkbox"/>	II <input type="checkbox"/>	III <input type="checkbox"/>	IV <input type="checkbox"/>	V <input type="checkbox"/>	VI <input type="checkbox"/>
Confession	<input type="text" value="Employee"/>		<input type="text" value="Spouse"/>					
Child allowance	<input type="text"/>	Other allowances	<input type="text"/>					

7 Salary / wage

Payment is based on	<input type="checkbox"/> salary	<input type="checkbox"/> hourly wage	
Gross monthly salary	<input type="text"/>	Net monthly salary	<input type="text"/>
Apprentice's pay	<input type="text" value="1st year"/>	<input type="text" value="2nd year"/>	<input type="text" value="3rd year"/>
Hourly wage	<input type="text"/>		
Commissions	<input type="text"/>		
Vacation pay	<input type="text"/>	Term of payment	<input type="text"/>
Christmas pay	<input type="text"/>	Term of payment	<input type="text"/>
Allowances <input type="checkbox"/>	Kindergarden allowance	<input type="text"/>	
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Variable bonus	<input type="text"/>	Percentage	<input type="text"/>
Assessment basis	<input type="text"/>		
Term of payment	<input type="text"/>		
Company car		Car number plate	<input type="text"/>
Type of car	<input type="text"/>		
Gross list price (new)	<input type="text"/>		
(incl. VAT)			
Distance between home	<input type="text" value="km"/>		
and workplace			
Other remuneration			
Monthly public transp. ticket	<input type="text"/>	Restaurant voucher	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

8 Company pension / payments to employees' savings schemes

Type of pension Name of insurance company

Monthly contributions thereof from deferred compensation

Direct debit authorization yes no
thereof from employer compulsory allowance (at least 15% of the employee premium)

If no,
 Bank details of the insurance company: Bank institute

IBAN

BIC

9 Working hours / vacation

Weekly working Time Total hours

Vacation entitlement per year Days

thereof Mo Tue Wed Thu Fri Sat Sun

Notice: If no weekly working time is specified in the employment contract, the authorities assume a weekly working time of 20 hours. On the basis of the minimum wage, this results in employment relationships that are subject to social security contributions and to which the regulations for mini-jobbers do not apply.
 If the weekly working time is not be distributed, total hours will be equally allocated from Mo – Fri.

10 Seizures / Assignments / Insolvency

Do exist any seizures or assignments?

yes no

If yes,

Consumer insolvency yes no

If no consumer insolvency,

Amount of the original debt based on court order (please hand in proof)

Amount of actual outstanding debt

Number of persons legally entitled to maintenance (please hand in proof)

If maintenance garnishment,

Monthly part of garnishment-exempt amount (notwithstanding the garnishment table – please hand in the court order=

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Additional request of employees with a salary below or at 450.00 Euro (marginal employment "mini-job")

I hereby apply to be freed from the duty to pay contributions to the statutory pension insurance in connection with my mini-job and waive thereby to receive credit in the compulsory contribution periods.

yes, I waive no different date of waiver
(if it is not the starting date of employment) MM/YYYY

Taxation of marginal employment should be accomplished by

- individual taxation attributes of the employee
- lump-sum wage tax of about 2%
- paid by employer
- paid by employee (reducing the net salary)

I am aware, that this request is valid for all mini-jobs that are done simultaneously and is binding for the whole duration of the employment. A withdrawal is not possible. I am obliged to inform any other employers about this request for exemption. I hereby certify that I took notice of the attached explanatory leaflet about the consequences of the exemption from the duty to pay contributions to the pension fund "Explanatory leaflet about the consequences of the exemption from the pension insurance obligation" of the "Bundesknappschaft" (Appendix I).

I have an additional employment besides this marginal employment that is fully subject to social security contributions

no yes

I have (an) additional marginal employment(s) (mini-job) with (an) other employer(s)

no yes, at

Company, Address	Monthly salary
Company, Address	Monthly salary

I certify that the total sum of all monthly gross salaries I receive in all mini-jobs does not exceed the amount of 450.00 Euro.

yes no

Notice: A mini-job shall not be considered to be an employment relationship that is fully subject to social insurance. Paying contributions to the Bundesknappschaft does not involve any health insurance coverage. In addition, the employee has to check his/her health insurance coverage at another health insurance company.

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Information about the working documents

Contract of employment	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Certificate about parenthood (if no tax allowance)	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Contract about employee saving plan	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Contract about company pension scheme	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Confirmation private health insurance showing the monthly contributions	(Original)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
assessment for exemption from statutory pension insurance from Deutsche Rentenversicherung	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Membership certificate from pension fund (Versorgungswerk)	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Latest pension approval certificate (Pensioner)	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Work permit	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Residence permit	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Certificate of school attendance (employment of pupil)	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Confirmation of matriculation (student)	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Study regulations / appropriate confirmation of the university (students with mandatory internship)	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Cost of childcare (if allowance)	(Original)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Seizure documents (garnishment order; actual amount of seizure; number of persons legally entitled to maintenance)	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Request for the exemption from the duty to pay contributions to the pension fund in connection with mini-job	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Confirmation of unemployment benefit	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later
Severely handicapped pass (both sides)	(Copy)	<input type="checkbox"/> enclosed	<input type="checkbox"/> provided later

Transmission of employment certificates

Employment certificates must always be sent electronically by the employer to the Federal Employment Agency. In accordance with § 313a SGB III, the employee is hereby informed that he/she may object to this electronic transmission.

Declaration and signature of employee

I declare that all the statements I have given are to the best of my knowledge correct and complete. I am aware that false or omitted statements against social security insurances or public authorities can be punished with a fine. I will inform my employer **immediately in writing** if there are any changes in statements of this questionnaire or if any other employments are taken up.

Place, Date

Employee's signature

Declaration of employee - Only valid for immediate report

I have been informed about the legally obliged carriage and duty of presentation of my identity card during my employment.

Place, Date

Employee's signature

Appendix I

Auszug aus dem Merkblatt über die möglichen Folgen einer Befreiung von der Rentenversicherungspflicht der Bundesknappschaft (Stand: 1. Januar 2016)

Allgemeines

Arbeitnehmer*innen, die eine geringfügig entlohnte Beschäftigung (450-Euro-Minijob) ausüben, unterliegen grundsätzlich der Versicherungs- und vollen Beitragspflicht in der gesetzlichen Rentenversicherung.

Vorteile der vollen Beitragszahlung zur Rentenversicherung

Die Vorteile der Versicherungspflicht für den/die Arbeitnehmer*in ergeben sich aus dem Erwerb von Pflichtbeitragszeiten in der Rentenversicherung. Das bedeutet, dass die Beschäftigungszeit in vollem Umfang für die Erfüllung der verschiedenen Wartezeiten (Mindestversicherungszeiten) berücksichtigt wird. Pflichtbeitragszeiten sind beispielsweise Voraussetzung für

- einen früheren Rentenbeginn,
- Ansprüche auf Leistungen zur Rehabilitation (sowohl im medizinischen Bereich als auch im Arbeitsleben),
- den Anspruch auf Übergangsgeld bei Rehabilitationsmaßnahmen der gesetzlichen
- Rentenversicherung, die Begründung oder Aufrechterhaltung des Anspruchs auf eine Rente wegen
- Erwerbsminderung, den Anspruch auf Entgeltumwandlung für eine betriebliche Altersversorgung und
- die Erfüllung der Zugangsvoraussetzungen für eine private Altersvorsorge mit staatlicher Förderung (zum Beispiel die so genannte Riester-Rente) für den/die Arbeitnehmer*in und gegebenenfalls sogar den/die Ehepartner*in.

Darüber hinaus wird das Arbeitsentgelt nicht nur anteilig, sondern in voller Höhe bei der Berechnung der Rente berücksichtigt.

Antrag auf Befreiung von der Rentenversicherungspflicht

Ist die Versicherungspflicht nicht gewollt, kann sich der/die Arbeitnehmer*in von ihr befreien lassen. Hierzu muss er seinem/seiner Arbeitgeber*in - möglichst mit dem vorliegenden Personalfragebogen - schriftlich mitteilen, dass er die Befreiung von der Versicherungspflicht in der Rentenversicherung wünscht.

Übt der/die Arbeitnehmer*in mehrere geringfügig entlohnte Beschäftigungen aus, kann der Antrag auf Befreiung nur einheitlich für alle zeitgleich ausgeübten geringfügigen Beschäftigungen gestellt werden. Über den Befreiungsantrag hat der/die Arbeitnehmer*in alle weiteren - auch zukünftige - Arbeitgeber*in zu informieren, bei denen er eine geringfügig entlohnte Beschäftigung ausübt. Die Befreiung von der Versicherungspflicht ist für die Dauer der Beschäftigung(en) bindend; sie kann nicht widerrufen werden.

Die Befreiung wirkt grundsätzlich ab Beginn des Kalendermonats des Eingangs beim/bei Arbeitgeber*in, frühestens ab Beschäftigungsbeginn. Voraussetzung ist, dass der/die Arbeitgeber*in der Minijob-Zentrale die Befreiung bis zur nächsten Entgeltabrechnung, spätestens innerhalb von 6 Wochen nach Eingang des Befreiungsantrages bei ihm meldet. Anderenfalls beginnt die Befreiung erst nach Ablauf des Kalendermonats, der dem Kalendermonat des Eingangs der Meldung bei der Minijob-Zentrale folgt.

Konsequenzen aus der Befreiung von der Rentenversicherungspflicht

Geringfügig entlohnt Beschäftigte, die die Befreiung von der Rentenversicherungspflicht beantragen, verzichten freiwillig auf die oben genannten Vorteile. Durch die Befreiung zahlt lediglich der/die Arbeitgeber*in den Pauschalbeitrag in Höhe von 15 Prozent (bzw. 5 Prozent bei Beschäftigungen in Privathaushalten) des Arbeitsentgelts. Die Zahlung eines Eigenanteils durch den/die Arbeitnehmer*in entfällt hierbei. Dies hat zur Folge, dass der/die Arbeitnehmer*in nur anteilig Monate für die Erfüllung der verschiedenen Wartezeiten erwirbt und auch das erzielte Arbeitsentgelt bei der Berechnung der Rente nur anteilig berücksichtigt wird.

Hinweis: Bevor sich ein/e Arbeitnehmer*in für die Befreiung von der Rentenversicherungspflicht entscheidet, wird eine individuelle Beratung bezüglich der rentenrechtlichen Auswirkungen der Befreiung bei einer Auskunfts- und Beratungsstelle der Deutschen Rentenversicherung empfohlen. Das Servicetelefon der Deutschen Rentenversicherung ist kostenlos unter der 0800 10004800 zu erreichen. Bitte nach Möglichkeit beim Anruf die Versicherungsnummer der Rentenversicherung bereithalten.

Extract from explanatory leaflet about the consequences of the exemption from the pension insurance obligation of the "Bundesknavpschaft" (status as of 1 January 2016)

General information

All employees carrying out a mini-job (up to 450.00 Euro) are in principle subject to the statutory pension insurance.

Advantages of paying full contributions to the statutory pension insurance

The advantages for the employee are in the receiving of credit in the compulsory contribution periods. This means, that the period of employment will be credited in the full extend for the required waiting/no-claims period (minimum insurance period). Compulsory contribution periods are for example conditional for

- earlier entrance to the retirement,
- claims for merits for rehabilitation (in a medical sector as well as in work life),
- claim for transitional payment in rehabilitation measures of the statutory pension insurance,
- acquiring and retaining the right to benefit from a pension because of reduction in the employee's working capacity,
- claim to convert a portion of their salary to company pension scheme and
- fulfillment of conditions for private retirement provision with state funding (for example the so called Riester-Rente) for the employee and possibly even for the spouse.

Furthermore, the salary is not only proportionally but also with the whole amount taken into account for the calculation of the pension.

Application for the exemption from the insurance obligation

The employee can voluntarily apply for exemption from the duty to pay contributions to the pension insurance if there is no insurance obligation wanted. Therefore, the employee has to inform the employer in a written form – preferably with the present personnel questionnaire – that she/he wishes to be freed of this liability. If the employee is carrying out several social insurance-free employments, the application can only be done for all employments under a uniform procedure.

All employers, also future employers, have to be informed about this application.

The exemption is binding for the whole duration of the employment. A withdrawal is not possible. The exemption is valid from the beginning of the month of handing over the waiver to the employer; at the earliest at the beginning of the employment.

Conditional is, that the employer gives notice about the exemption to the mini-job-center until the next payroll accounting, latest within 6 weeks after receiving the application. Otherwise the exemption is valid after the ending of the month following the month of the notice at the mini-job-center.

Consequences from the exemption from insurance obligation

Employees with a marginal employment, applying for the exemption from the pension insurance obligation, waive voluntarily the above named advantages. By the exemption, only the employer is paying the lump contribution of 15 percent (respectively 5 percent for employments in private households). Any own contribution of the employee is omitted. The result is, that the employee is only proportionally earning credit in the required waiting period as well as the earned salary is only taken proportionally into account for the calculation of the future pension.

Indication: Before making the decision about a exemption from the insurance obligation, an individual consultation about the pension law relevant consequences at an information and consultancy center of the "Deutsche Rentenversicherung" is recommended. The service phone of the "Deutsche Rentenversicherung" is free of charge under 0800 10004800. Please keep ready the social security number if possible, when calling the authorities.