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An das Landesamt für Finanzen  
Dienststelle  
Bezügestelle Besoldung

Eingang bei der Bezügestelle  
(please leave this field blank for  
the Finance Office)

## Personal data sheet for professors for determining details relating to salary

### Important note pursuant to Article 16 para 3 of Bavaria's Data Protection Act (BayDSG):

The information requested in this personal data sheet is required in order to accurately determine the employee's salary. Please fill out this sheet carefully and in full to avoid legal consequences.

Any gender-specific titles used in this sheet were chosen for the sake of readability – they apply to both men and women.

### I Personal data (to be filled out by the employee)

Personnel number / <i>Personal-Nr.</i> (if known):			
Title	Last name	First name	Date of birth
Maiden name (if applicable)		Place of birth	Nationality
Postal code	City	Street name and house number	
Telephone number (voluntary):			
Place of employment:			
Pension insurance number ( <i>Rentenversicherungsnummer</i> ) / membership number for pension scheme for members of the professions (if known):			

### 1 Statement concerning payment of salary:

Please transfer my salary to the following account <sup>1</sup> :	
BIC	IBAN
Bank (please include address)	

<sup>1</sup> The account provided must be in your own name, or in your name and your spouse or life partner's name in case of a joint account. Your salary cannot be transferred to a savings account (*Sparkonto*).

If the salary is transferred to an account outside the EU, the employee shall bear the costs and fees involved in the transfer as well as the costs for filing a report in accordance with § 59 of the *Außenwirtschaftsverordnung* [Foreign Trade and Payments Ordinance] (Article 18 sentence 2 of the *Bayerischen Besoldungsgesetzes*).

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I am aware that

- at any time up to my last day of work (or penultimate day of work if the last day falls on a Saturday), the Finance Office is authorized to debit any funds wrongly transferred to me directly from my account
- my salary payments will be transferred to me on the last working day of the month, or the penultimate working day of the month if the last working day falls on a Saturday.

If salary payments are transferred to me without a legal basis - especially after salary entitlement has ceased (e.g. following dismissal or during a period of unpaid leave) - I hereby permit the Finance Office to debit the amount from my account directly.

## 2 Information relating to family allowance:

I am single.

I am married / live with my life partner<sup>2</sup> / am divorced / my marriage or life partnership was annulled / my spouse is deceased / my life partner<sup>2</sup> is deceased.

**Please fill out and submit an *FOS-Erklärung*<sup>3</sup> (declaration form for family allowance, residence allowance, and social allowance).**

I am single / divorced / my marriage or life partnership<sup>42</sup> was annulled AND there is another person living in my place of residence (e.g. a child) or I financially support a child who lives elsewhere but with whom contact has not been suspended.

**Please fill out and submit an *FO-Erklärung*<sup>3</sup> (declaration form for family allowance and residence allowance).**

I have one or more children and

I am applying for child benefits. The child benefits application  is enclosed  
 will be submitted at a later date

I am not applying for child benefits because another authorized person already receives benefits for the child / children

**Please fill out and submit an *FOS-Erklärung*<sup>4</sup> (declaration form for family allowance, residence allowance, and social allowance).**

If the salary is transferred to an account outside the EU, the employee shall bear the costs and fees involved in the transfer as well as the costs for filing a report in accordance with § 59 of the *Außenwirtschaftsverordnung* [Foreign Trade and Payments Ordinance] (Article 18 sentence 2 of the *Bayerischen Besoldungsgesetzes*).

<sup>2</sup> "Life partners" as set forth in the *Lebenspartnerschaftsgesetz*.

<sup>3</sup> Forms are available on the web at [www.lff.bayern.de/formularcenter/besoldung/](http://www.lff.bayern.de/formularcenter/besoldung/) or from your human resources department.

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**3 Periods of service to be considered in establishing salary rank in accordance with Art. 42a para 1 number 3 item B BayBesG<sup>5</sup>**

(the periods of service to be considered will provide the basis for determining salary rank)

**Since my first appointment as a professor**

I spent a period of time on parental leave (please provide evidence) or looking after a child (please provide a description in writing).

I spent a period of time caring for a close relative (parent, parent-in-law, spouse, life partner as set forth in § 1 *Lebenspartnerschaftsgesetz*, sibling, or child) who was deemed by medical professionals to be in need of care (please furnish evidence). Please provide a detailed description of the circumstances.

I have taken part in a selection process of the German Armed Forces under the terms of the *Eignungsübungsgesetz* (please enclose any certificates of military service).

I request that my previous periods of membership in the Federal German Government, the governments of the German states (*Länder*), in the Landtag of Bavaria, in law-making bodies in other German states, at the federal level, or at the EU level be considered for the purpose of establishing a fictitious earlier start date for my employment.

Please attach a statement of the position and the timeframe and a confirmation that you did not receive any financial settlement for the periods in office.

<sup>5</sup> The university president is responsible for considering periods of service in accordance with Art. 42a para 1 numbers 1, 2 and 3 item A and para 3 sentence 2 *BayBesG*.

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#### **4 Details concerning service anniversary dates**

According to the regulations governing the payment of service anniversary bonuses to civil servants and judges (*Jubiläumswendungsverordnung – JzV*), civil servants employed by the state, the city, or another entity, institution, or foundation shall be given bonuses after completing 25, 40, and 50 years of service.

The start date for service anniversaries is the first day of training or primary employment for a public organization as described in § 29 para 1 *Bundesbesoldungsgesetz*.

The following will be counted if they occurred prior to the commencement of training or primary employment in the public service:

- periods of military service of up to two years,
- periods of service in border protection or civilian service that are equivalent to nonprofessional military service as well as time spent rendering humanitarian aid (if accepted in place of military or civilian service),
- periods as an honorary civil servant.

#### **Details of professional history to be used in determining service anniversary dates:**

<input type="checkbox"/> I have no previous training or employment history in the public service.
<input type="checkbox"/> I was trained / employed in the public service (please enclose evidence documenting relevant training or employment).
<input type="checkbox"/> I rendered military service for up to two years prior to my training or employment in the public service.
<input type="checkbox"/> I rendered service in border protection or civilian service that is equivalent to nonprofessional military service prior to my training or employment in the public service.
<input type="checkbox"/> I rendered humanitarian aid that was accepted in place of military or civilian service prior to my training or employment in the public service.
<input type="checkbox"/> I was an honorary civil servant prior to my training or employment in the public service.
<b>Please enter these periods of service in the table below and enclose evidence to document your service.</b>



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## 5 Defined-contribution pension account

I request the deduction of a defined amount from my paycheck and the corresponding pension payments to be made by the employer. My application for defined-contribution pension payments and a corresponding certificate from a financial institution

is enclosed.

will be submitted at a later date.

I do not request the deduction of a defined amount from my paycheck and the corresponding pension payments to be made by the employer.

## 6 Wage taxes and church taxes to be withheld

The wage tax card was replaced by an electronic system (ELStAM) effective 01.01.2013. Information concerning wage taxes can now be accessed electronically.

Please provide the following information.

My Tax ID number (*Steueridentifikationsnummer*) is:

My employment for the Free State of Bavaria is my

primary employment

secondary employment

When calculating taxes for the secondary employment, a tax-free allowance under the terms of § 39 a para 1 sentence 1 number 7 *EStG* in the amount of € is to be included<sup>7</sup>.

6 § 39a *EStG* Tax-free allowance and additional amount (excerpt)

(1) 1 At the request of an employer who is subject to income tax, the Finance Office will calculate the tax-free allowance to be subtracted from the salary by adding together the following figures:

(...)

7. An amount for a second or additional employment contract, rounded to the whole euro amount of the taxable amount for the year under the terms of § 39b para 2 sentence 5, up to the amount deemed wage-tax-free according to the employee's tax bracket established on the basis of the first employment contract.

<sup>2</sup> The conditions are as follows:

- a) the total earnings for the year from the first employment relationship must be less than the decisive initial amount as described in sentence 1 and
- b) there must also be an amount contributed on the basis of the first employment contract to match the amount contributed for the second or additional employment contract that is added to the earnings (additional amount).

(...)

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## 7 Supplementary insurance

The Free State of Bavaria has set up a supplementary insurance policy<sup>8</sup> for me:

no

yes

If so, by (name of office or agency that authorized the supplementary insurance)

for the period of

to

## 8 Private retirement plan ("Riester" retirement arrangement)

Information concerning my retirement plan must be reported annually to the *Zentrale Zulagenstelle für Altersvermögen (ZfA)* to be considered for tax relief.

**Please fill out and submit the form<sup>11</sup> *Einwilligung zur Übermittlung und Verwendung von Daten zum Zwecke der steuerlichen Förderung der privaten Altersvorsorge***

## 9 Additional information:

I hereby solemnly confirm the accuracy of the information I provided.

I will immediately report any changes to the information provided on this form to the responsible Finance Office (department: *Besoldung*) in writing.

I am aware that I will have to pay back any undue amount that is transferred to me on the basis of omissions, delays, or errors.

\_\_\_\_\_  
Date of signature

\_\_\_\_\_  
Signature

<sup>8</sup> Pursuant to § 8 para 2 SGB VI, supplementary insurance is set up for persons who were exempt from the pension scheme whether as a civil servant or judge (tenured, fixed-term or probationary employment); as a professional soldier or a regular soldier; as a civil servant during a period of teaching practice; as an employee of a public entity, organization, foundation or a unit thereof (including a central organization or working group thereof); as a statutory member of a religious order, of the deaconesses, or of a similar order; as a teacher or childcare worker at a non-public school or institution, if their employment ended without claim or entitlement to benefits or they lost their claim to benefits and there are no grounds for suspending the payment of contributions (§ 184 Abs. 2 SGB VI).

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**To be filled out by human resources department/ personnel administration**

## II Ergänzende Angaben der Personal verwaltenden Stelle<sup>9</sup>

(von der Personal verwaltenden Stelle vorab auszufüllen)

Name		Vorname	Geschäftszeichen
Ernennungszeitpunkt	Amtsbezeichnung		Besoldungsgruppe
Dienststelle			Haushaltsstelle (Kapitel, Titel, AOST)

Ein Abdruck des Bescheides über die Feststellung von anrechenbaren Zeiten nach Art. 42a Abs. 1 Nrn. 1, 2, 3 Buchst. a und Abs. 3 Satz 2 BayBesG

liegt bei.

wird nachgereicht.

Anrechenbare Zeiten nach Art. 42a Abs. 1 Nrn. 1, 2, 3 Buchst. a und Abs. 3 Satz 2 BayBesG liegen nicht vor.

**Zulagenberechtigende Verwendung** ab \_\_\_\_\_ als \_\_\_\_\_

Rechtsgrundlage:

**Ggf. weitere erforderliche Angaben für die Festsetzung von Besoldungsbestandteilen**

(z.B. Zulagen/Vergütungen/Aufwandsentschädigungen):

Keine Angaben.

Die obigen Angaben stimmen mit dem Inhalt der Personalakte überein bzw. werden bestätigt

Adresse der Personal verwaltenden Stelle	Sachbearbeiter	Telefonnummer

Datum

Stempel Unterschrift (Personal verwaltende Stelle)

<sup>9</sup> Bitte auf Seite 1 links oben auch die Adresse der zuständigen Bezügestelle für den künftigen Bezügeempfänger ausfüllen.