P11D Categories - Feature Overview

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Overview

P11D categories are used to group expenses into set classifications to aid with the arrangement of an employee's annual P11D form. P11D categories are completely optional and can be tailored to match your organisation's requirements.Typical categories include mileage allowance, travel subsistence and personal telephone expenses.

All expenses incurred that have an assigned P11D category will be collated against each claimant and stored within your system. This information is reportable and can be exported to your organisation's existing payroll systems.

Benefits

- **HMRC Compliance** - Ensures your organisation is compliant in declaring all P11D recognised expenses and benefits in kind.

- **Accounting Organisation** - P11D categories allow financial departments to compile employee records more efficiently.

- **Expense Reporting** - Provides accessible data that can be reported on and analysed.

Features

Feature	Description
Add/Edit P11D Categories	Create and edit organisation specific P11D Categories
Assign to Expense Items	Assign a P11D category to various expense items
Reportable Data	P11D expense item data available for reporting

Implementation

1. You will require an Access Role with the 'P11D Categories' element active in order to add or edit P11D categories.

2. To add a P11D category, navigate from the **Home** page to **Administrative Settings | Base Information | P11D Categories**. For more information, view Manage P11D Categories .

3. To create and export P11D reports, navigate from the **Home** page to **Reports**. For more information, view Create a Report .