

Map an Expense Item to an ESR Payment Element

Last Modified on 05/03/2021 9:38 am GMT

Permissions

You will require an Access Role with the following permissions:

- Base Information
- Expense Items


Note: This article relates to the ESR Inbound process and is relevant to NHS organisations only. Follow the links below to view the ESR Process Diagram or Feature Overview for a full description of the process:

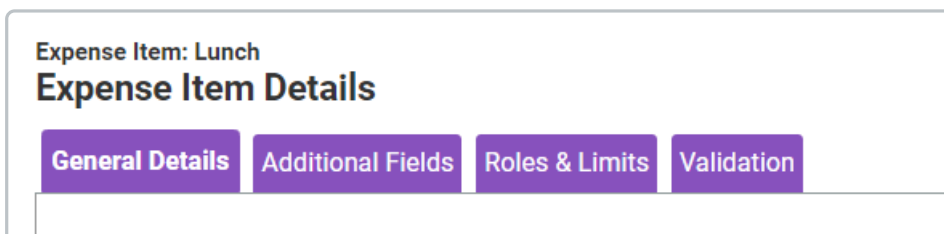
[ESR Inbound - Process Diagram](#)

[ESR Inbound](#)

When creating an expense item you will need to complete an additional section to ensure that it is recorded in the ESR Payment File. At the bottom of the 'Expense Item Details' page, there are two fields that determine the ESR element through which the expense item will be paid and any associated quick code or "Allowance Type".



Note: Not all ESR Elements require a quick code so you will not always need to set the allowance type, but you will always need the "ESR Element" to be set.

1. Navigate from the Home page to **Administrative Settings | Base Information | Expense Items**
2. Locate the expense item and click  to open the Expense Item Details page.



3. Within the General Details tab, scroll down to the Other Information section.

Other Information

ESR Inbound Payment Element  ESR Element Allowance Type 

4. Complete the required fields:

Fields	Description
ESR Inbound Element	From the drop-down list, select an ESR element to map the expense item to. The chosen element will be used to configure any additional payment rules when setting up the ESR financial export.
ESR Element Allowance Type	eFrom the drop-down list, select an allowance type. The chosen allowance will be used to configure any additional payment rules when setting up the financial export. Note: Not all expenses items require an allowance type.

Note: If an element that you require is not included in one of the two fields, more can be added by navigating to **Administrative Settings | Tailoring | User Defined Fields**. For more information, view [Create a User Defined Field](#).

5. Click **Save** to confirm.
