

Individual Training Account

Finding and Understanding Information on FIPS

May 2019

V2

A large, abstract teal graphic on the right side of the page, consisting of several overlapping rectangular shapes with white dotted borders, creating a grid-like pattern.

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For Info

There are various ways of finding the information you need on FIPS. This document outlines in Section 1 what information is displayed on the System Views provided and gives the meanings of all statuses applied to ITA applications, assignments, leavers, claims and payments.

Section 2 offers examples of how to use Advanced Find to find courses with assignments against them and to find Proof of Income documents that have been onto the system. Please note that these are just two examples of its functionality and it is advisable to spend some time exploring this handy function to find the best use of it for your organisation.

Applications

SYSTEM VIEWS

ITA Active Applications

To see ITA applications which have not yet been verified.

→ [Applications](#)

→ [ITA Active Applications](#)

Submitted Applications

To see applications which have been verified.

→ [Applications](#)

→ [Submitted Applications](#)

APPLICATION STATUSES - MEANINGS

Draft

- Participant not verified
- Application not submitted
- Assignment not created.

Submitted

- Participant verified
- Application submitted
- Assignment may/may not have been created, depending on whether FIPS confirmed if the participant is already receiving funding for any SDS programme (if they are then they are not eligible for ITA).

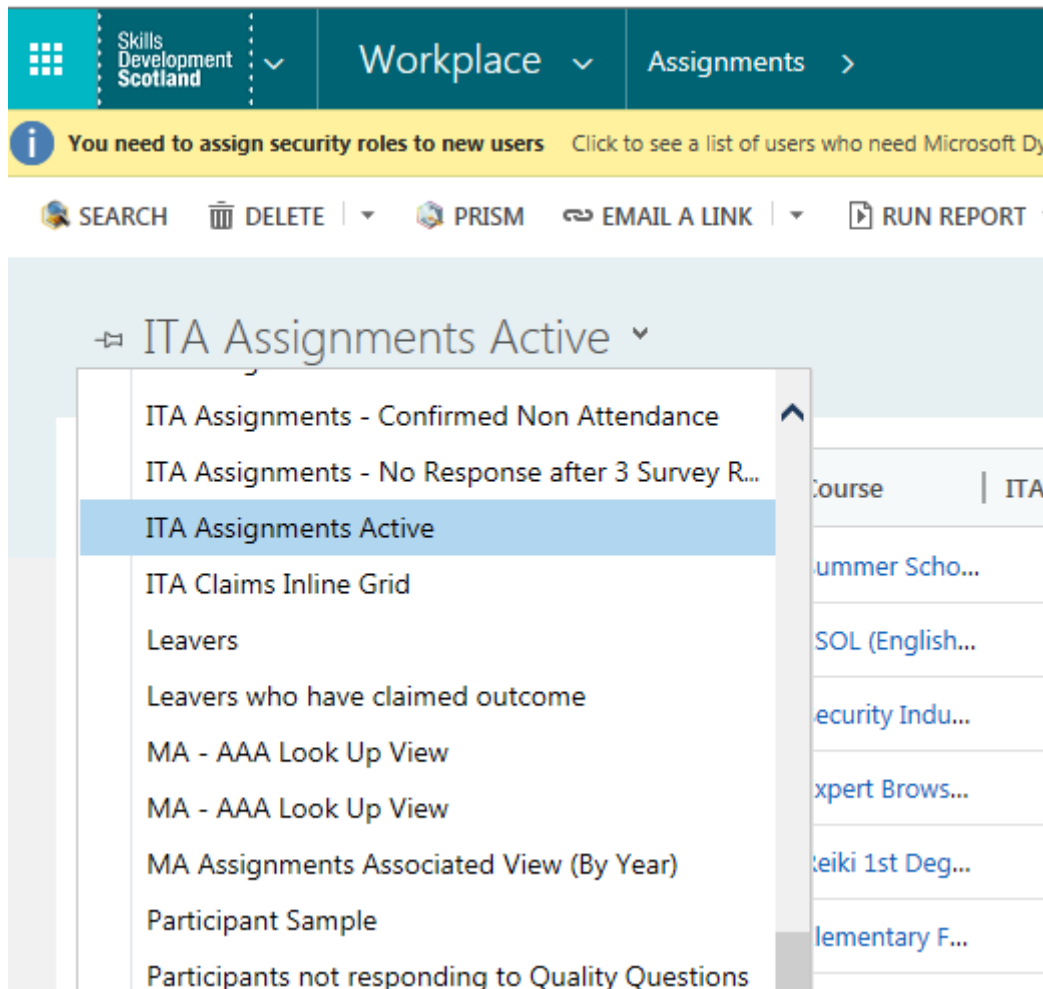
APPLICATION SCREEN:

The participant's application screen shows you:

- The learner's name, address & contact details
- Details of the course they have applied for
- The date that the application was submitted by the applicant (**MyWoW Application Time Stamp**)
- Training Provider Details
- Training Provider References

Assignments

SYSTEM VIEWS



ITA Assignments Active

Shows all active assignments, ie assignments that are within an active ITA learner year where the participant has not completed or cancelled their course.

Includes only Confirmed & Unconfirmed assignments.

- [Assignments](#)
- [ITA Assignments Active](#)

ITA Assignments – Booked

Shows only active assignments that have not yet been claimed for, ie only Unconfirmed Assignments.

- [Assignments](#)
- [ITA Assignments - Booked](#)

ITA Assignments Inline Grid

Shows both active and inactive ITA assignments.

i.e.. assignments that have not yet been claimed or have expired, assignments that have been claimed or are available to claim, and assignments that have been cancelled or

completed (aka 'Leavers').

→ [Assignments](#)

→ [ITA Assignments Inline Grid](#)

ITA Assignments – Leaver

Shows inactive assignments only, which have 'left' the ITA programme.

This includes assignments where:

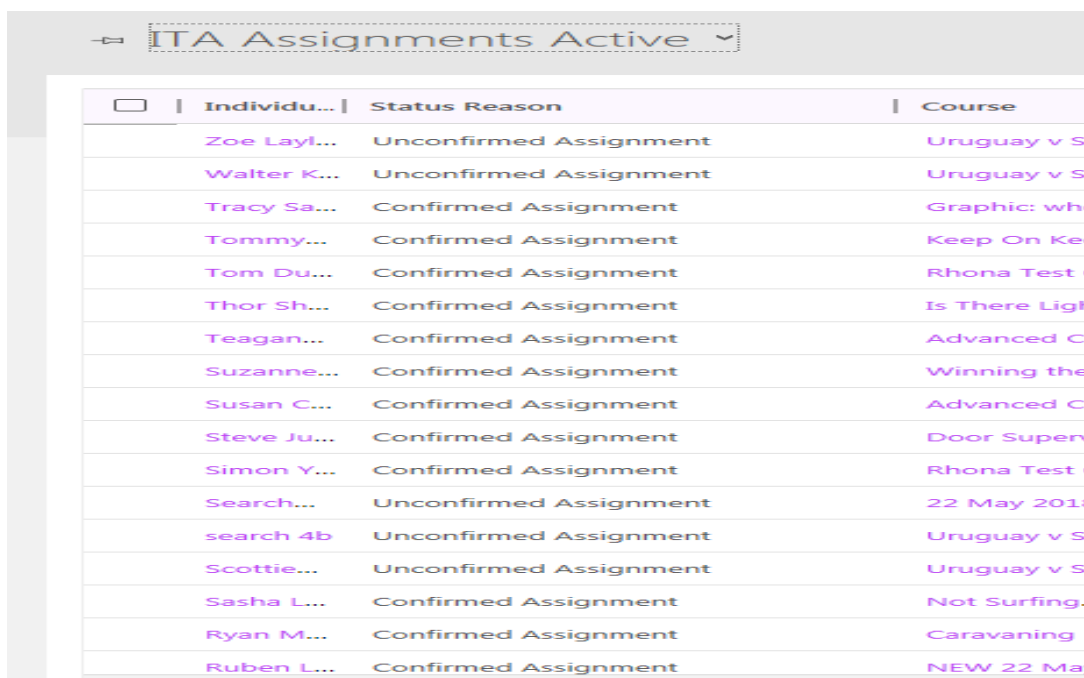
- Assignment cancelled by participant/training provider/SDS
- Participant confirmed non-attendance
- Participant confirmed completion of training
- Participant was a No Show (did not attend course)
- Participant's ITA Learner Year expired without the assignment being claimed

→ [Assignments](#)

→ [Assignments - Leaver](#)

ASSIGNMENT STATUSES - MEANINGS

You can see the status of an assignment in the system view, or by looking at the assignment itself.



The screenshot shows a system view titled "ITA Assignments Active". Below the title is a table with the following columns: "Individual", "Status Reason", and "Course". The table contains 17 rows of data, each representing an assignment for a specific individual. The status reasons are either "Unconfirmed Assignment" or "Confirmed Assignment".

Individual	Status Reason	Course
Zoe Layl...	Unconfirmed Assignment	Uruguay v S...
Walter K...	Unconfirmed Assignment	Uruguay v S...
Tracy Sa...	Confirmed Assignment	Graphic: whc...
Tommy...	Confirmed Assignment	Keep On Kee...
Tom Du...	Confirmed Assignment	Rhona Test C...
Thor Sh...	Confirmed Assignment	Is There Ligh...
Teagan...	Confirmed Assignment	Advanced Cr...
Suzanne...	Confirmed Assignment	Winning the...
Susan C...	Confirmed Assignment	Advanced Cr...
Steve Ju...	Confirmed Assignment	Door Superv...
Simon Y...	Confirmed Assignment	Rhona Test C...
Search...	Unconfirmed Assignment	22 May 2018
search 4b	Unconfirmed Assignment	Uruguay v S...
Scottie...	Unconfirmed Assignment	Uruguay v S...
Sasha L...	Confirmed Assignment	Not Surfing..
Ryan M...	Confirmed Assignment	Caravanning
Ruben L...	Confirmed Assignment	NEW 22 May

ASSIGNMENT : INDIVIDUAL TRAINING ACCOUNT

Zoe Layla Fox - SERI Regression Testing - ITA - 2018 - U...

Individual
Zoe Layla Fox

Contract
SERI Regression Testing -
ITA - 2018

Status Reason
Unconfirmed Assignment

- ▶ Actions
- ▶ Participant Details
- ▶ Training Provider Details
- ▶ Training Details
- ▶ Update Equalities Information
- ▶ Cancellations

Cancellation Reason

- ▶ Training Provider References
- ▶ Upload Documents

Training Provider SERI Regression Testing

Owner SERI Regression Testing

Active

Unconfirmed

- Participant verified
- Assignment created (participant booked on course)
- No claim made.
- No payment issued.

Confirmed

- Participant verified
- Assignment created (participant booked on course)
- Claim placed
- Payment may/may not have been issued (see Payment Claims for this info)

Leaver (Archived)

- Participant verified
- Assignment created but is no longer active
- Payment may/may not have been claimed and/or issued (see Payment Claims for this info)
- The assignment is now considered finished and it has 'left' the ITA programme
- Reasons for Leaver (Archived) status:
 - Assignment cancelled
 - Participant confirmed non-attendance
 - Participant confirmed completion of training
 - Participant was a No Show (did not attend course)
 - Participant's ITA Learner Year expired without assignment being claimed

ASSIGNMENT SCREEN:

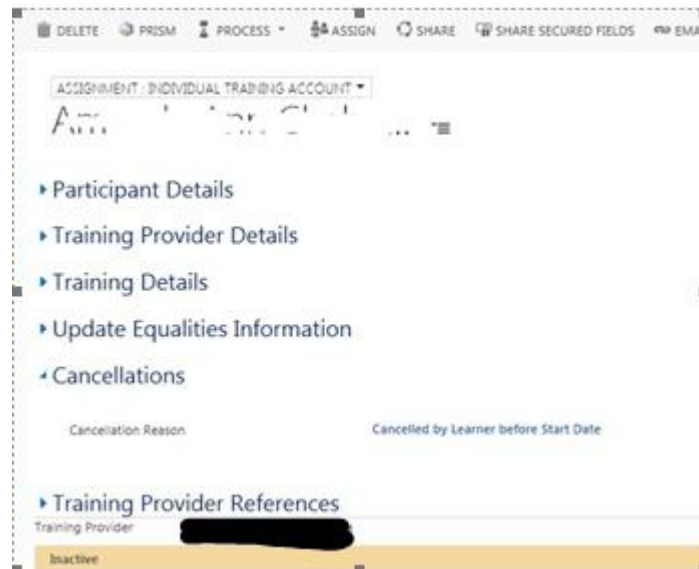
Useful information to be found on the assignment screen:

- Participant details (address, contact details etc.)
- Date that the application was submitted and assignment created; this is also the date of the start of the participant's ITA Learner Year (**ITA Start Date**)
- Date of the end of the participant's ITA Learner Year (**ITA End Date**)
- If the participant has been verified as eligible for ITA (**ITA Status**)
- **Cancellation Reason** (if assignment has been cancelled)
- Training Provider References

Leavers

LEAVER STATUSES - MEANINGS

You can find the Leaver Status in the Assignments – Leaver system view, or by opening up an individual assignment and expanding the cancellation section:



Cancelled by Learner – Exceptional Circumstances

- Participant started course but had to cancel or postpone training due to unforeseen circumstances
- Payment may/may not have been claimed and/or issued
- Payment claim should be undone
- Payment should be undone or clawed back
- Participant is eligible to submit application for another course

Cancelled by Learner before Start

- Participant cancelled course booking before course start date
- Claim/payment has not been made and/or issued
- Participant is eligible to submit application for another course

Cancelled by Training Provider before Start

- Training provider cancelled assignment before course start date
- Claim/payment has not been made and/or issued
- Participant is eligible to submit application for another course

Cancelled by SDS

- SDS cancelled assignment (could be before or after course start date)
- Payment may/may not have been claimed and/or issued
- If claim made, should be undone by SDS
- If payment issued, should be clawed back by SDS
- Participant may be eligible to submit application for another course, unless SDS have had cause to render their ITA inactive and marked their ITA Status as Ineligible (see Participant Record for this info).

- No Show** did not attend course
 - Claim/payment has not been made and/or issued (training providers unable to claim for No Shows)
- Participant
 - Participant is eligible to submit application for another course

Confirmed Non-Attendance

- Participant did not attend course and has confirmed this when responding to survey sent by SDS
- Payment has been claimed and issued
- Payment should be clawed back by SDS
- Participant is eligible to submit application for another course

Completed

- Participant attended course and has confirmed this when responding to survey sent by SDS
- Payment has been claimed and issued
- Participant is not eligible to do another ITA course until their ITA End Date

Expired

- not been claimed for the assignment
 - Participant's ITA Learner Year has passed the ITA End Date - so no claim can now be made against this assignment
 - Participant can apply for ITA again to begin a new ITA Learner Year
- Payment has

Note: Assignment statuses, including Leaver statuses, only tell you the status of that individual assignment. They do not tell you if the participant's ITA Learner Year is still active or not.

An assignment may have a 'Leaver' status and therefore have 'left' the ITA programme, but the participant's ITA Learner Year remains active. The ITA Learner Year is not impacted by the assignment holding a Leaver status: it remains active until the ITA End Date, regardless of the status of individual assignments created and cancelled within that learner year.

The only assignment status that advises of the ITA Learner Year expiring is the 'Expired' leaver status, where no claim is made within the ITA Learner Year before it reaches its ITA End Date. However, another assignment might show the 'Completed' leaver status and also belong to a participant whose ITA Learner Year has expired, but whose assignment was completed before the ITA End Date.

To check whether a participant's ITA account is active or inactive, you need to check the ITA Start & End Dates on their Participant record.

Payment Claims

Note that a Payment Claim is a request for payment, not the payment itself. Assignments can be claimed individually or as part of one bulk claim covering multiple assignments.

PAYMENT CLAIM: ITA SCREEN

To view information about a payment claim you should view the Payment Claim ITA screen; you can find this by going to the Payment Claims section, or by clicking on it from the Payment: Information screen (below).

PAYMENT : INFORMATION
Surf Dogs - £199.00

▶ Submission
◀ General

General	History
Amount * £ 199.00	Posting Run
Training Provider (Pay) Surf Dogs	Sent to Finance (
Type Plan Payment	Reversal Sent Or
Payment Claim * -+ - Surf Dogs - ITA - 2017 - Unknown Qualification - ITA Contribution	
Related Payment Claim Information	

[+ NEW](#) [DELETE](#) [ASSIGN](#) [SHARE](#) [SHARE SECURED FIELDS](#) [EMAIL A LINK](#) [RUN WORKFLOW](#) [START DIALOG](#) [WORD TEMPLATES](#)

PAYMENT CLAIM : ITA - INFORMATION ▾

Brian TESTITA Ward - Old Jamaica Ltd - ITA - 2017 - Un... ☰

[Submission](#)

[Undo](#) [ClawBack](#)

[General](#)

Name	Brian TESTITA Ward - Old Jamaica Ltd - ITA - 2017 - Unknown Qualification - ITA Contribution
Owner *	Old Jamaica Ltd
Individual Payment Plan *	Brian TESTITA Ward - Old Jamaica Ltd - ITA - 2017 - Unknown Qualification
Claim Type *	Course Attendance
Claimed On	04/10/2017 00:00
Amount *	£200.00

[Document Upload](#)

Note Text

ACTIVITIES

All ▾ | [Add Phone Call](#) [Add Task](#) ...

Date of Evidence

Inactive

This shows you:

- Date claim was submitted (Claimed On)
- Amount (this is shown for the individual assignment only, not for the sum of the bulk claim for multiple assignments)
- Status of the claim (bottom left along the orange bar)
- Status Reason of the claim (bottom right above the orange bar)

SYSTEM VIEWS

There is an extensive menu of system views available in the Payment Claims section; below are the ones that are most useful and relevant to ITA.

Active Payment Claims

Active claims are claims where no payment has yet been issued. Active claims may or may not have been submitted by the training provider; the payment will still be on the pre-posting run.

- [Payment Claims](#)
- [Active Payment Claims \(filter by Programme to see ITA only\)](#)

Inactive Payment Claims

Claims for payments become inactive once the payments have been issued and are therefore no longer on the pre-posting run.

- [Payment Claims](#)
- [Inactive Payment Claims \(filter by Programme to see ITA only\)](#)

Held Payment Claims

If a payment claim has been put on hold then you will find it listed here.

- [Payment Claims](#)
- [Held Payment Claims \(filter by Programme to see ITA only\)](#)

PAYMENT CLAIM STATUSES - MEANINGS

Each assignment shows the status of the payment claim that it relates to, whether that claim was made singularly or as part of a bulk claim.

Available to Claim

The claim is expected to be submitted (because an assignment exists that can be claimed against), but the training provider has not yet submitted the claim.

Pending

The claim is expected to be submitted (because an assignment exists that can be claimed against), but the training provider has not yet submitted the claim.

Holding

The claim has been submitted but then put on hold; none of the payments within that claim have been issued and they will remain on the pre-posting run until the claim is un-held.

Confirmed Claim

The claim has been submitted and the payments have been issued; payments are no longer on the pre-posting run and no further payment(s) can be generated for the assignment(s) claimed for.

Undone

The claim has been submitted but undone before payment(s) issued. The assignment(s) is still available to claim for but a new claim must be submitted.

Payments

A payment is generated for an assignment when a claim is submitted for that assignment. Each assignment generates its own individual payment, even if it has been submitted as a bulk claim along with multiple other assignments.

This is so that you can track payments for each assignment, and also in order for training providers to undo or hold one payment within a claim without holding or undoing all of the payments within that claim.

Payments always have an 'active' status, even after they have been issued.

Payment:Information screen

If you need to find out more about a payment then you can use the Payment: Information screen.

- [Payments](#)
- [Active Payments](#) (filter by Programme to see ITA only, or simply search by name, then double-click to select and view detail)

The screenshot displays the 'PAYMENT: INFORMATION' screen for a payment titled 'Highland Spring - £200.00'. The status is 'Active'. The screen is divided into several sections:

- Submission**
- General**
 - Amount: £200.00
 - Training Provider (Pay): Highland Spring
 - Type: Plan Payment
 - Payment Claim: R9Lewis Hamilton - Highland Spring - ITA - 2017 - Italian GP - ITA Contribution
- Related Payment Claim Information**
 - Individual: R9Lewis Hamilton
 - NI Number: hs567565b
 - Assignment: R9Lewis Hamilton - Highland Spring - ITA - 2017 - Italian GP
 - Claim Type: Course Attendance
 - Expected Claim Date: 12/09/2018
 - Status Reason: 2
- History**
 - Posting Run: 908: 20/09/2018 11:00
 - Sent to Finance On: 20/09/2018 10:11
 - Reversal Sent On: [Empty field]

At the bottom, it shows 'Modified By: FPS UAT Admin', 'Modified On: 20/09/2018 10:11', and 'Owner: FPS UAT Admin'.

This shows you:

- Training Provider name
- Participant Name
- Programme (i.e. ITA)
- Amount claimed
- Date that the posting run was generated (History section, Posted Run)
- Date that the posting run posted payments to Finance for issue to training provider (History section, Sent to Finance On)
- Date the payment was clawed back (History section, Reversal Sent On)
- Payment status (Status field, top right corner)
- Claim status (Related Payment Information section, Status Reason)

Individual Payment Plan

You can also find information about a payment on the Individual Payment Plan screen. This is accessible from the General section of the Payment Claim: ITA screen

INDIVIDUAL PAYMENT PLAN : INFORMATION
R9Lewis Hamilton - Highland Spring - ITA - 2017 - Italia...

General

Name: R9Lewis Hamilton - Highland Spring - ITA - 2017 - Italian GP

Owner: Highland Spring

Assignment: R9Lewis Hamilton - Highland Spring - ITA - 2017 - Italian GP

Total Outstanding: £0.00

No of Units: 0

Total Paid: £200.00

Total Value: £200.00

Retained Outcome %:

Status Reason: Activated

Payment Type:

Currency: Pound Sterling

Notes:

Source Payment Plan:

In the General section (above) you will find:

- Amount paid
- Payment Status
- Name of training provider
- Name of participant

Source Payment Plan													
Initial Payment Claim													
Last Payment Claim	R9Lewis Hamilton - Highland Spring - ITA - 2017 - Italian GP - ITA Contribution													
Payment Claims All ▾														
Status Reason	Holding Reaso...	Individual	Participant NL...	Programme (D...	Area of Scotla...	Occupational...	Framework (D...	VQ Level (Deri...	Start Date (De...	Expected End...	Actual End Dat...	Age Group (D...	Claim Type	Miles
Confirmed Claim		R9Lewis Ha...	hs567565b	ITA					04/09/2018	04/09/2019			Course Attendance	

If you scroll down (see above) you can also find:

- Status of claim

Ignore all other fields as they are not relevant to ITA.

SYSTEM VIEWS

ITA Payments – Pre-Posting Extended

Shows only ITA payments that are on the pre-posting run and not those that have been

issued.

→ *Payments*

→ *ITA Payments – Pre-Posting Extended*

Payments - Pre-Posting

Shows only payments that are on the pre-posting run and not those that have been issued.

→ *Payments*

→ *Payments Pre-Posting* (filter by Programme to see ITA only)

Active Payments

Displays all payments: those which are on the pre-posting run and those which have been paid out.

→ *Payments*

→ *Active Payments* (filter by Programme to see ITA only)

PAYMENT STATUSES - MEANINGS

Ready to Send to Finance

Payment has been generated and is sitting on the pre-posting run waiting to be issued.

Hold

Payment has been generated but put on hold before being issued; it will not be released to be paid out on the next posting run until it is taken off hold.

Sent to Finance

Payment has been generated and has been paid out on the posting run.

Courses

Each course has its own page on FIPS providing information about that course. To see a full list of your courses and view details:

- [Workplace](#)
- [Contracts](#)

On your ITA Contract page you will see a short list of your courses.

Course Title ↑	Status Reason...	Course Cost	Participant Contributio...	ITA Contribution	Course Duration (days)	Curriculum	Course Venue	Contract	Training Provider
Hamilton v Hibs	Taking Booki...	£10,000.00	£9,800.00	£200.00	2.00	Hospitality	Fir park Street, G2 1DY	Highland Spring - IT...	Highland Sprin
Italian GP	Taking Booki...	£200.00	£0.00	£200.00	365.00	Adult Literacy & Nu...	Monza, g2 1dy	Highland Spring - IT...	Highland Spring
Motherwell v Aberdeen	Taking Booki...	£187.00	£0.00	£187.00	365.00	Fitness, Health and B...	Fir park Street, G2 1DY	Highland Spring - IT...	Highland Spring
UAT France v Uruguay	Taking Booki...	£67.00	£0.00	£67.00	131.00	Early Years and Child...	Test Street, G2 1DY	Highland Spring - IT...	Highland Spring


- Clicking on the icon circled above to bring up a fuller list of all your courses
- Search for a particular course using the alphabet at the bottom of the screen or using the search field on the page

+ ADD NEW COURSE ADD EXISTING COURSE BULK DELETE CHART PANE RUN REPORT EXCEL TEMPLATES EXPORT COURSES

<input type="checkbox"/>	Course Title ↑	Course Cost	Participant Contributio...	ITA Contribution	Course Duration (days)	Curriculum	Course Venue	Contract	Training Provider (Cc
	Hamilton v Hibs	£10,000.00	£9,800.00	£200.00	2.00	Hospitality	Fir park Street, G2 1...	Highland Spring - IT...	Highland Spring
	Italian GP	£200.00	£0.00	£200.00	365.00	Adult Literacy & Nu...	Monza, g2 1dy	Highland Spring - IT...	Highland Spring
	Motherwell v Aberdeen	£187.00	£0.00	£187.00	365.00	Fitness, Health and...	Fir park Street, G2 1...	Highland Spring - IT...	Highland Spring
	UAT France v Uruguay	£67.00	£0.00	£67.00	131.00	Early Years and Chil...	Test Street, G2 1DY	Highland Spring - IT...	Highland Spring
	Webb to leave Wales for toulon	£125.00	£0.00	£125.00	21.00	Business	Online from particip...	Highland Spring - IT...	Highland Spring

- View course details by clicking on the course title in the list

General

Course Title *	🔒 Italian GP
Contract	🔒 Highland Spring - ITA - 2017
Course Cost *	🔒 £200.00
VAT *	🔒 £0.00
ITA Contribution *	🔒 £200.00
Participant Contribution *	🔒 £0.00
Curriculum *	🔒 Adult Literacy & Numeracy
Course Venue *	🔒 Monza, g2.1dy
Course Duration (days) *	🔒 365.00
Qualification *	🔒 Non certificated
Status Reason *	🔒 Taking Bookings
Attendance *	🔒 Part Time
Owner *	🔒  Highland Spring

COURSE: INDIVIDUAL TRAINING ACCOUNT SCREEN

To see full details of your courses and their associated presentations, you can view them on the Course Management Tool. Information on courses is more limited on FIPS, however you can find the following info on the course details screen:

- The cost of the course, including the amount you can claim under ITA funding (**ITA Contribution**) and the amount to be paid by each participant (**Participant Contribution**)
- Venue of the course
- Duration of course
- Qualification
- Attendance type
- **Status Reason** of the course
- All participants assigned to that course (scroll down to the Assignments section)

Note that FIPS does not recognise or provide dates for any courses: FIPS is a payment system rather than a booking system. It is necessary for course dates to be correct on the Course Management System as this information is required by the learner when booking their preferred instance of the course, but FIPS only needs to know the above information about the course in order for a claim to be processed against an assignment.

You can also use Advanced Find to search for specific courses or see only courses that are taking bookings, or which have active assignments – see Section 2 on the next page for some guidelines on how to use this function.

COURSE STATUSES - MEANINGS

Taking Bookings

Your contract is active and the course has been approved for ITA funding after submission on the Course Management Tool. It is available for you to assign participants to and claim on those assignments.

Not Taking Bookings

You are not able to assign participants to a course that is Not Taking Bookings, and therefore will not be able to claim for them either. The course may have this status because your contract is not active, because the course has not been approved on the Course Management Tool, or because we do not hold payment information for your organisation on FIPS.

If your courses show as Not Taking Bookings, then the likelihood is that the start date for the course submitted through Course Management tool has passed. If this is the case, please contact SDS Customer Services

General

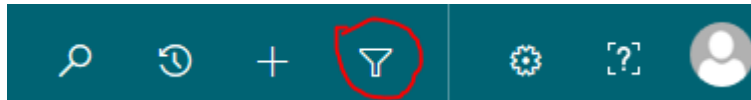
Contract Executive	Stewart Forrest	Date Active From	05/10/2017
Programme	ITA	Date Active To	
Training Provider	Highland Spring	Contract Signatory	(No name)
TP Creditor Code	123456		

Course Title	Status Reason	Course Cost	Participant Contributio...	ITA Contribution	Course Duration (days)	Curriculum	Course Venue	Contract	Training Provider
Hamilton v Hibs	Taking Booki...	£10,000.00	£9,800.00	£200.00	2.00	Hospitality	Fir park Street, G2 1DY	Highland Spring - IT...	Highland Sprin
Italian GP	Taking Booki...	£200.00	£0.00	£200.00	365.00	Adult Literacy & Nu...	Monza, g2 1dy	Highland Spring - IT...	Highland Sprin
Motherwell v Aberdeen	Taking Booki...	£187.00	£0.00	£187.00	365.00	Fitness, Health and B...	Fir park Street, G2 1DY	Highland Spring - IT...	Highland Sprin

Status Reason **Activated**

Active

Using Advanced Find



Advanced Find is a handy tool in the menu ribbon at the top of the FIPS screen that can be used for tailored queries and for creating your own personal views (n.b For more on Personal Views, see the Personal Views video guide on the ITA training documents webpage).

The below examples provide some of the basic logic for creating your own searches, which you can adapt to find whatever information you require.

Example 1: Finding courses that have active assignments against them

Advanced Find - Microsoft Dynamics 365 - Internet Explorer

Microsoft | Dynamics 365

FILE | ADVANCED FIND

Query Saved Views Results New Save Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML

Show View Query Debug

Look for: Courses Use Saved View: [new]

Contract Equals Highland Spring - ITA - 2017

Select

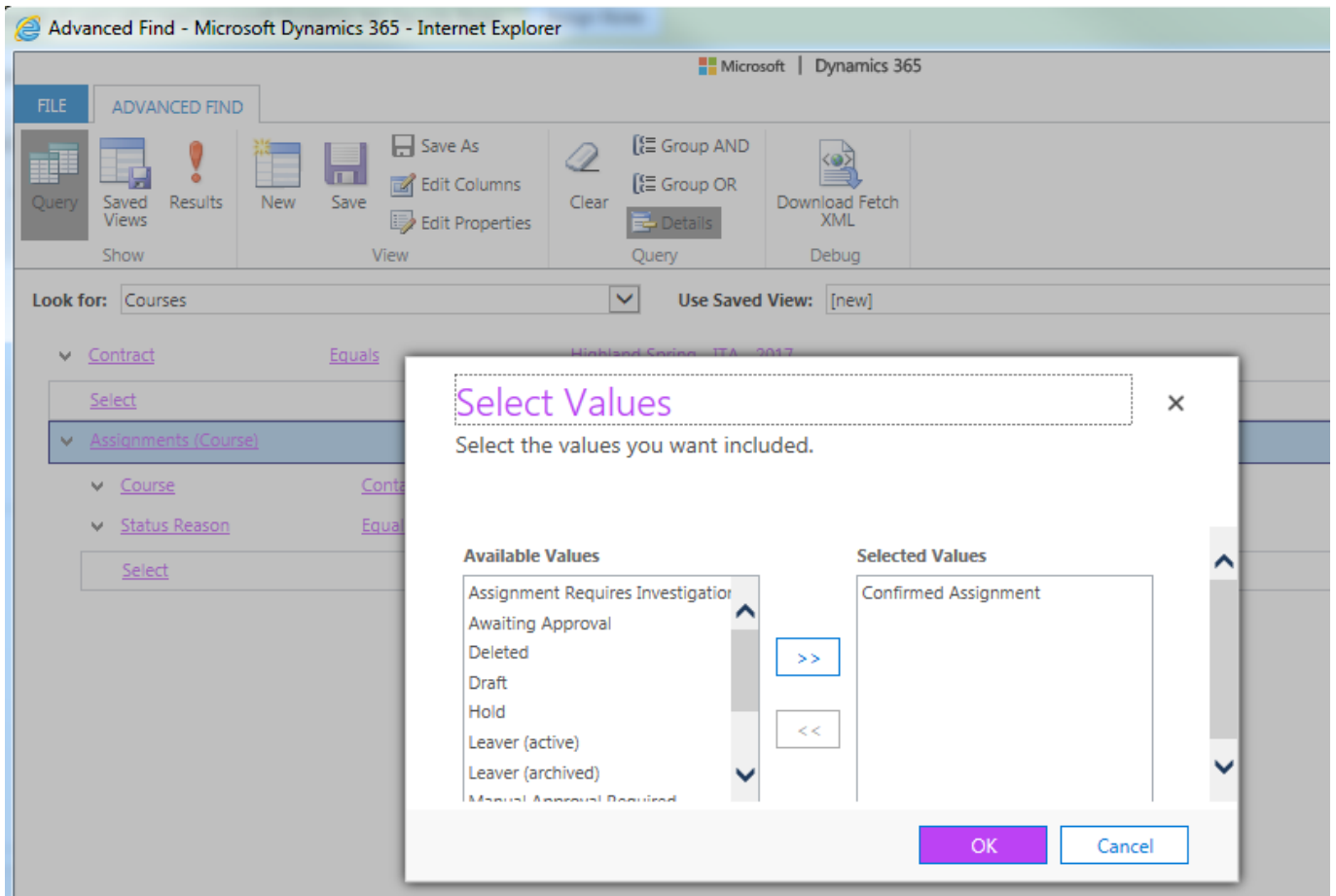
Assignments (Course) Contains Data

Course Contains Data

Status Reason Equals Confirmed Assignment ...

Select

- Select an option in the drop-down list under 'Look For'
- Select Contract – Equals – [name of organisation]
- Select Assignments (Course) – this appears in a blue bar because all subsequent selections will be fields that are relevant to Assignments (Course)
- Select Course – Contains Data (this means that any/all courses will show as long as they have some sort of data)
- Select Status Reason – Equals – Confirmed Assignment/Unconfirmed Assignment (see below – move desired options from left to right using the arrow buttons and then press 'OK'): this will display all assignments with these statuses against all courses under that contract.

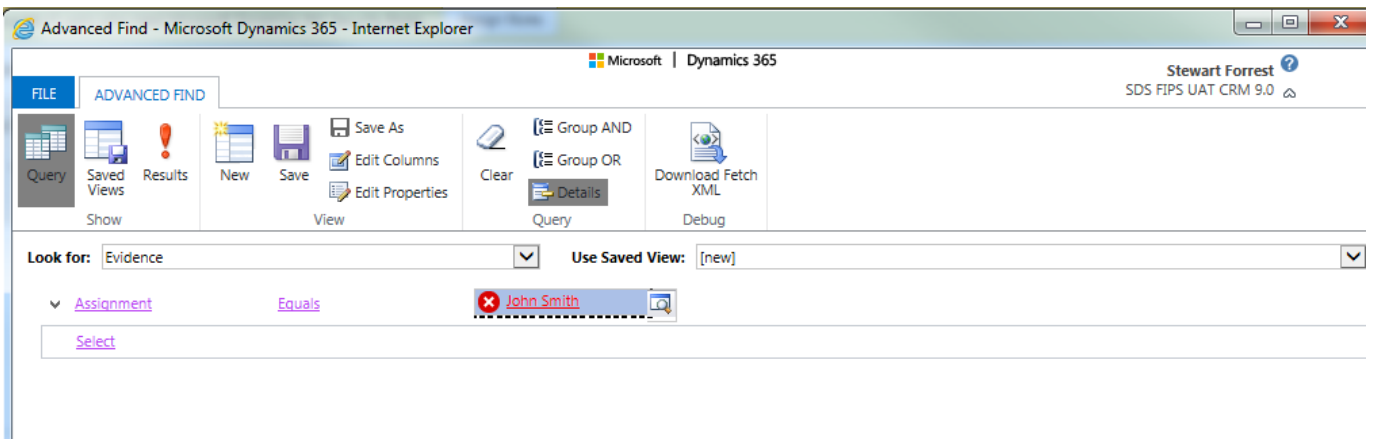


- Press the 'Results' exclamation mark to obtain results.

Example 2: Finding POI docs that have been uploaded onto an assignment.

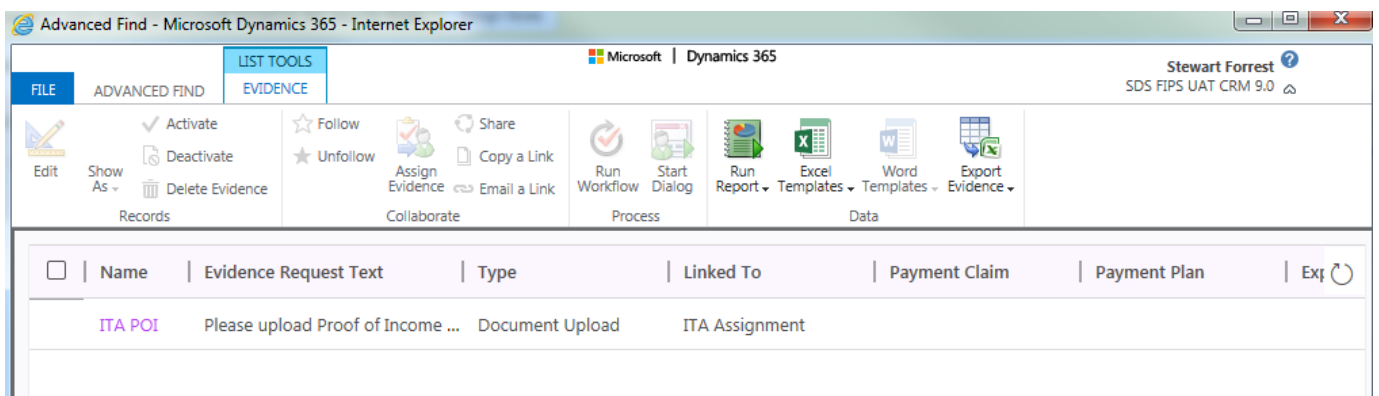
If you upload POI documents onto an assignment and wish to review or amend them afterwards, then use Advanced Find as follows:

- Go to Advanced Find
- Select Evidence from the Look For menu
- Select either Application or Assignment (depending on which the POI was uploaded to) and EQUALS the participant's name if looking for one person in particular
- Press Results



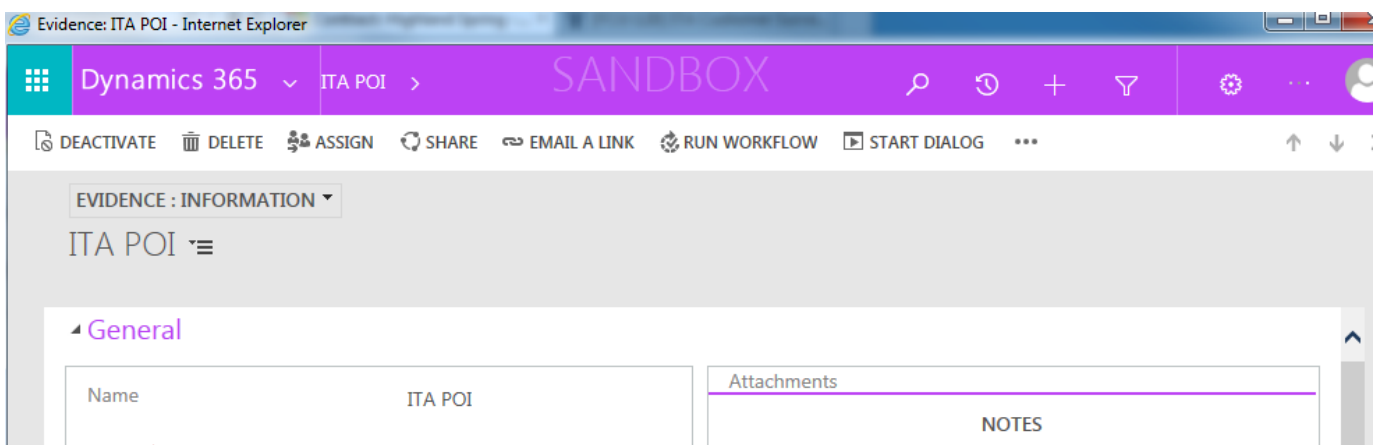
This will bring up the below screen

- Select the Evidence record



This opens the evidence record below

- Press the downwards arrow to bring up the drop-down menu
- Select Documents



This will display the Document Uploaded Grid which shows all Proof of Income that has been uploaded to the SharePoint, enabling you to view the documents if you wish.