


Work Able Scotland (WAS)

Corporate Training System (CTS)
guidance

April 2017

This document will cover how to
process claims for WAS and view
claims screen

A large, abstract graphic on the right side of the page, composed of several overlapping teal-colored rectangular shapes with a white dotted border. The shapes are arranged in a grid-like pattern, with some overlapping others, creating a sense of depth and movement.

How to Process Claims for WAS

All claims processed for WAS must be claimed on CTS via the Claim Incentive Schemes tab within List Trainees.

For individual participants, the claims that can be processed are:-

- WAS MA Job Outcome
- WAS MA Sustained Outcome
- WAS Job Outcome
- WAS Sustained Job

To make a claim for the individual, go to Trainee Records, List Trainees.

Search for the participant that you require to make the claim for. In this example, Test Smith is displayed:-

List Trainees ○ NTP's ● Training for Work

Enter criteria and click 'Search'

Area

Local Authority Area

Training Provider

Licence No

Contract

Trainee

NI Number

Search for Last Name Between and

Field Chooser

NI Number	Trainee Name	Date of Birth	Start Age	Area	Provider	Contract	Start Date	End Date	Leaving Date	1st Qual.	1st Qual. Level	2nd Qual.	Status	Input Date	App Date	Reason	Local Auth.	Placement Name	Trainee Postcode	VQ Title	
	Smith, Test	03/03/1994		B			11/04/2017														

1 Assignment

Claim Incentive Schemes tab is shown at the bottom of the List Trainees screen:-



How to Process Claims for WAS

Select the record required so that it is highlighted in gray, per the screenshot above.

Click on Claim Incentive Schemes tab. This will display a popup window with the Incentive Claims that are available for Stage 2 purposes. **Please note, claims relating to EF will also appear here – these should be disregarded for WAS purposes.**

The popup window will appear on screen:-

Scheme Name	Description	Claim Date	Posting Run ID	Amount	Undone?
WAS - MA Job Outcome	WAS - MA Job Outcome	13/04/2017	1058	£ 800.00	
WAS - MA Sustained Outcome	WAS - MA Sustained Outcome	13/04/2017	1058	£ 1200.00	

In this example, claims have already been processed for this WAS participant. These are displayed in the "Submitted Claims" table:-

- WAS – MA Job Outcome
- WAS - MA Sustained Outcome

If no claims had been made for the participant, this would show as "No Records Returned".

To process a claim, select the relevant option from the Scheme drop-down. **Please note, Service Fee and Rural Uplift Service Fee will appear on the list for each participant. These claims should not be made on individual participant records but processed monthly on a dummy assignment. Further guidance below.**

How to Process Claims for WAS

Select the relevant claim from the drop-down list:-

Employability Fund (Stage 2) Incentive Claims

Scheme :

Submitted C

WAS -		
WAS - MA Job		
WAS - MA Su		

Select to submit a claim

Employability Fund - Stage 2 (Compliance Recovery Start)

Employability Fund - Stage 2 (Outputs)

WAS - MA Job Outcome

WAS - Job Outcome

WAS - MA Sustained Outcome

WAS - Service Fee Month 1

WAS - Service Fee Month 10

WAS - Service Fee Month 11

WAS - Service Fee Month 12

WAS - Service Fee Month 2

WAS - Service Fee Month 3

WAS - Service Fee Month 4

WAS - Service Fee Month 5

WAS - Service Fee Month 6

WAS - Service Fee Month 7

WAS - Service Fee Month 8

WAS - Service Fee Month 9

WAS - Service Fee Rural Uplift Month 1

WAS - Service Fee Rural Uplift Month 10

WAS - Service Fee Rural Uplift Month 11

WAS - Service Fee Rural Uplift Month 12

WAS - Service Fee Rural Uplift Month 2

WAS - Service Fee Rural Uplift Month 3

WAS - Service Fee Rural Uplift Month 4

WAS - Service Fee Rural Uplift Month 5

WAS - Service Fee Rural Uplift Month 6

WAS - Service Fee Rural Uplift Month 7

WAS - Service Fee Rural Uplift Month 8

WAS - Service Fee Rural Uplift Month 9

	Claim D
	13/04/20
	13/04/20
	13/04/20

How to Process Claims for WAS

For this example, "WAS – Sustained Job" has been used. All fields within the screen are mandatory and must be completed before the claim can be submitted.

Employability Fund (Stage 2) Incentive Claims

Scheme :

Description :

Values :

Company Details :
 This scheme requires company details to be entered, please fill in all fields below.
 Company Name:
 Address 1: Address 2:
 Town: Postcode:
 Contact Name: Phone Number:
 Email Address:

When Scheme has been selected, "Description" field will pre-populate.

- Select the value from the Values drop-down

Complete the Company Details information that relates to the participant. Once details have been entered, click on Submit Claim.

Once submitted, the screen will update automatically to show what has been processed. If the claim is successful, it will display a message "Claim Submitted OK":-

Claim Submitted ok.

Submitted Claims

Scheme Name	Description	Claim Date	Posting Run ID	Amount	Undone?
WAS - Job Outcome	WAS - Job Outcome	19/04/2017	0	£ 800.00	
WAS - Sustained Job	WAS - Sustained Job	19/04/2017	0	£ 1200.00	

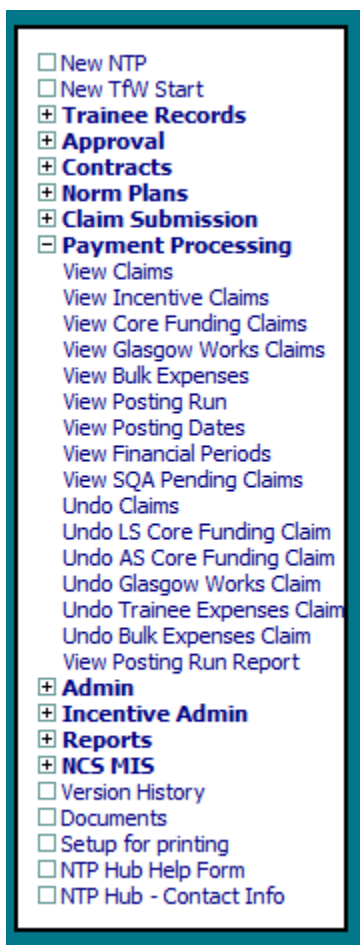
How to Process Claims for WAS

Rural Uplift and Service Fee claims are processed on CTS in the same way as described above however not for individual participants.

The claims will be made on a dummy – or test – assignment. This assignment information will be created and issued to providers from the NTP Hub. The claims will be processed monthly on this assignment as required.

When claims have been processed in CTS, they can be checked / viewed within the View Claims screen. A copy of this information can be taken and pasted into an excel spreadsheet and this information can be reconciled with the remittance advice sent to training providers from SDS Finance.

View Claims screen can be found within the Payment Processing tab on the CTS menu:-



Note: depending on your access, you will not see the entire menu as displayed above.

Within View Claims, populate the fields and click on Search:-

The screenshot shows the 'View Claims' search interface. It includes the following fields and controls:

- Training Scheme:** A dropdown menu with 'Training for Work' selected.
- Licence Number:** A text input field containing 'CD1674AA'.
- Lead Area:** A dropdown menu with 'ALL' selected.
- Company Name:** A text input field containing 'D & M DUMMY COMPANY'.
- Search:** A button to execute the search.

How to Process Claims for WAS

This report will show all claims made on CTS up until the payment file is sent to SDS Finance. This process is completed at lunchtime each Friday. The cut-off for claims to be posted in any given week is at midnight on Thursday. A copy of the claims processed should be taken before the payment file is sent to finance – preferably after all the claims have been submitted for the week. If the copy is taken on a Friday, it will show any claims submitted on Friday however these will not be picked up / posted until the following week's run.

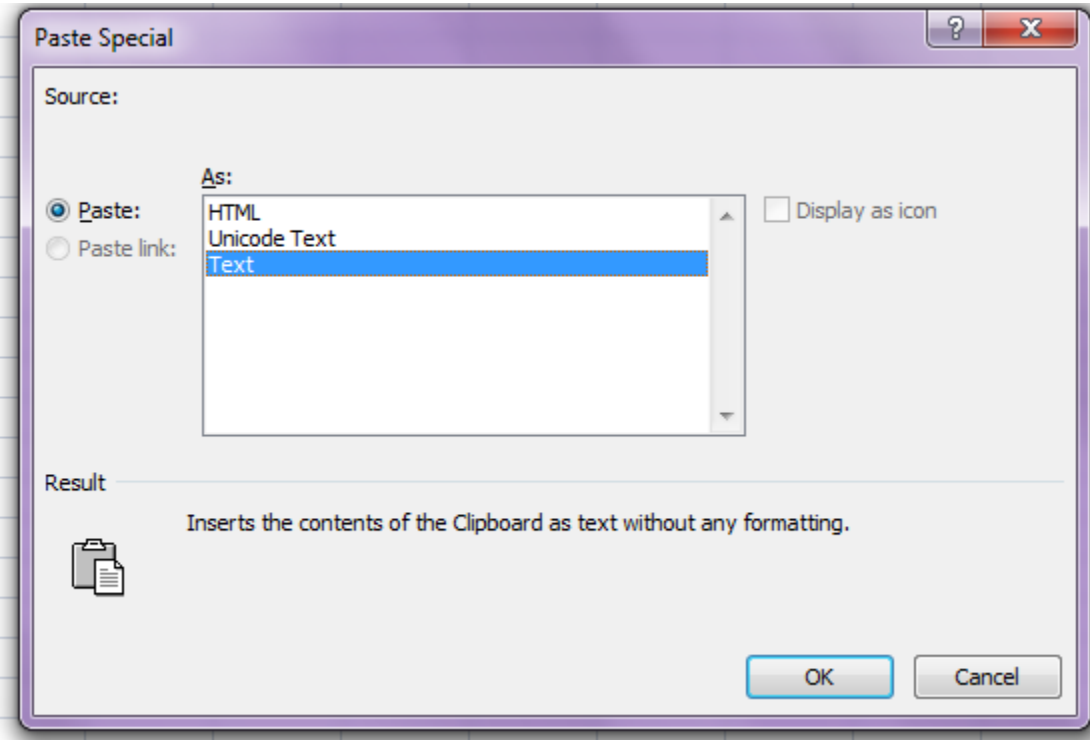
To copy View Claims, highlight the screen and click on Copy:-

F.O.	Claim Received	VI Number	Name	Transaction Details	Amount
SEP	19-SEP-2017	TN335157F	Test Smith	WAS - Service Fee Rural Uplift Month	£-750.00
SEP	19-SEP-2017	TN335157F	Test Smith	WAS - Sustained Job	£1,200.00
SEP	19-SEP-2017	TN335157F	Test Smith	WAS - Job Outcome	£300.00
excluding withheld claims					£1,750.00
Total withheld					£0.00
Total claimed					£1,750.00

Paste this into excel by right clicking and selecting Paste Special:-

How to Process Claims for WAS

Within Paste Special, use the Text option:-



This will copy over all the information from CTS into individual rows. A remittance advice will be emailed to each training provider from SDS Finance on Wednesday of the following week.

End of document.