

# EF FIPS Glossary

Term	Description
Activated Payment Plan	A Payment Plan that has passed internal FIPS checks or has been manually approved by a Skills Investment Advisor. A Payment Plan associated with an Assignment, where the status of the Assignment allows the Training Provider to make claims. For EF, this is from the point that the Assignment has a status of ' <b>Confirmed</b> Assignment'.
Actual Spend	The value that has been claimed and paid to a Training Provider within one Contracting Period. Actual spend cannot exceed Contract Value
Additional Support Needs Fund	A fund maintained by SDS for EF Participants with Additional Support Needs to support the purchase of additional equipment or personal support to help the Participant complete the EF.
Agresso	The internal financial system used by SDS to pay Training Providers
Alert	Notification of actions that are required.
Application	Individual's data input by the Training Provider on FIPS prior to verification.
ASN	Additional support needs
Assignment	A verified application.
Change of Circumstances	An amendment to the Date of Birth, NI Number or start date of an active assignment.
Claim	A submission by a Training Provider requesting a payment by SDS against the Individual Payment Plan.
Clawback	Initiated by SDS where it has been identified that a Training Provider has erroneously claimed, usually because the Training Provider has not met their contractual obligations. The process claws back any erroneous payments and prevents the Training Provider from claiming that payment again in the future.

Contract	<p>The display of volumes and values that SDS has contracted the Training Provider to deliver. The Contract enables SDS to control volumes by LEP area and values delivered.</p> <p>Note: FIPS does not store the actual contracts with the Training Provider. The Contract on paper must be updated and signed by the Training Provider.</p>
Contract Sub Component	EF overall contract value is split into sub-components to ensure payments of different claims types are made as expected by SDS .
Contract Value	A single value against a contract, up to which a Training Provider can claim.
Contract Volume	The number of new starts that the Training Provider can register within the year.
Contracting Period	The duration of the contract. This can vary but it is typically from 1 <sup>st</sup> April to the 31 <sup>st</sup> March the following year.
Dashboard	The first screen after logging into FIPS. FIPS has system dashboards and there is the facility to create custom dashboards.
Draft	Any form that can be created in FIPS for submission to SDS for approval can be saved as a draft prior to submission.
Early Leaver	A participant who has been registered in FIPS, but has left without achieving all of the Individual Training Plan (ITP).
Individual Record	A summary of contact information, personal information and related applications and assignments for an individual. Each individual should only have one individual record in FIPS regardless of number of assignments.
Individual Payment Plan	The section in an individual's assignment in FIPS that contains information on the claims against a particular Assignment.
Invoice Number	The invoice number is manually obtained from Agresso. Used by Compliance to make adjustments in FIPS where they have previously raised an invoice in Agresso.
ITP	Individual Training Plan.
Leaver	A participant who has left the programme.
Leaver (active)	A leaver whose assignment is still active on FIPS to allow a Training Provider to continue to submit associated claims.

Leaver (archived)	A leaver whose assignment is no longer active on FIPS. The Training Provider is unable to submit any further claims.
Leaver Details	Leaver code and leaver date. This is needed by SDS as soon as possible for forecasting and reporting purposes. Leaver codes are required for all assignments, both Early Leavers and those that achieve Outcome claims. List of leaver codes can be found in EF Rules Appendix 13
Manual Approval Required	An Assignment status which requires an action to be undertaken by SDS when the Assignment is associated with a Participant with Payment History or RROA. No claims can be made against an Assignment with the status Manual Approval Required.
NI	National Insurance. A NI Number is a unique personal identifier generated by the UK government which is used as the unique personal identifier for FIPS.
Payment History	Any payments against a previous Assignment for the Participant. The existence of a Payment History for a Participant means the new assignment must be manually approved by SDS before claims can be made against it.
Permission	A user's right to perform a specific action or task. Permissions are assigned by SDS to security roles. Users are then assigned security roles.
Pre posting run	A list of the submitted claims not yet transferred to Agresso
Posting run	The transfer of submitted claims from FIPS to Agresso
Resident Resides Out with Area	A Participant who is assigned to a contract that does not include their home post code.
RROA	Resident Resides Out with Area
Security role	A defined set of user rights. If you are a user of FIPS, you must be assigned at least one security role to access the system. The security role assigned to a user determines which tasks the user can perform and which parts of FIPS the user can view. See permission
SOC 2010	<a href="#"><u>Standard Occupational Classification 2010</u></a>

Start Date	<p>There are two Start Dates available against the EF assignment:</p> <ul style="list-style-type: none"> <li>- Start Date – the date of Start entered by the Training Provider during Registration.</li> </ul> <p>Approved Start Date – the date the Assignment is approved by SDS.</p>
Undo	<p>An undo of a claim prior to posting in Agresso can be executed by TP organisations and SDS. This removes the claim from the pre-posting run. Undos of paid claims can be executed by SDS only and posts a negative value to Agresso, equivalent to the claim value. Where a claim is undone, it can be claimed again in FIPS at a later date.</p>
User	<p>Any person who has access to FIPS.</p>
Workflow	<p>An automatic process in FIPS created to eliminate the need to perform a lot of manual tasks or to oversee a set of predefined actions.</p>