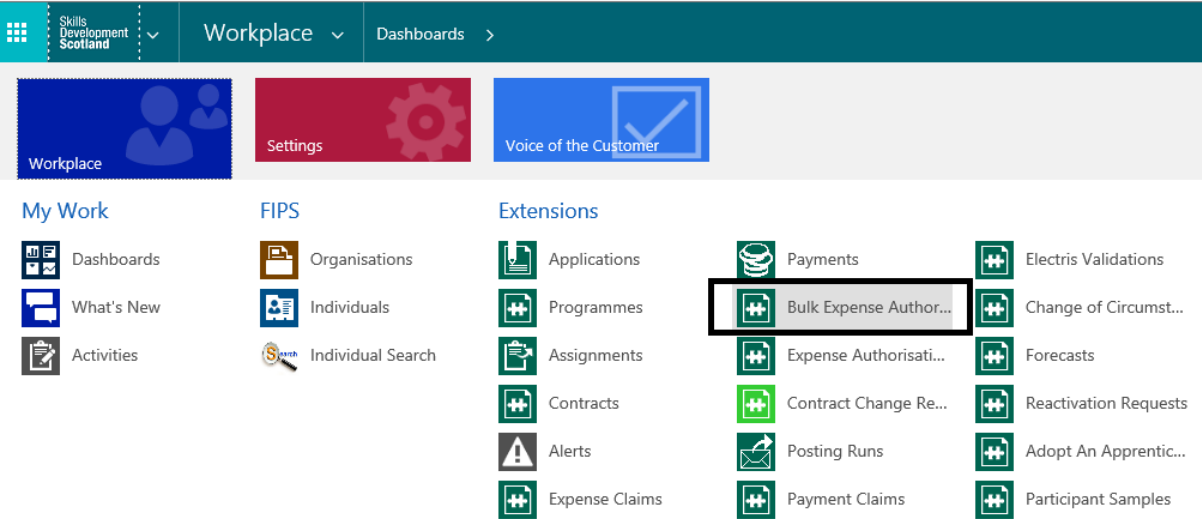


FIPS QUICK START GUIDE

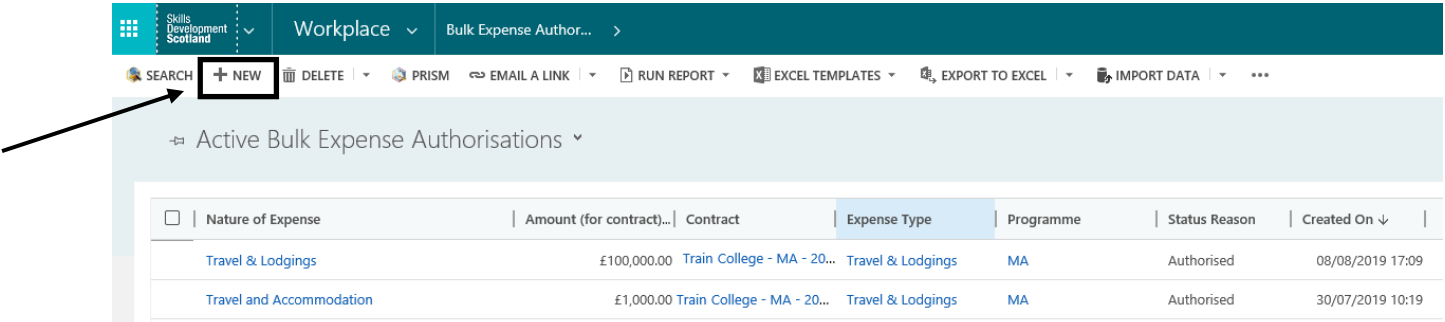
Bulk Expense Claim

This guide will cover how to create a Bulk Expense Authorisation for Bulk Expense claims in FIPS.

1. Navigate to Workplace Payments - Bulk Expense Authorisation



2. The view will default to Active Bulk Expensive Authorisations. This screen should be used to create a new Bulk Expense Authorisation. Click on New:



The screenshot above shows an example that has 2 authorisations created and Authorised by SDS.

- When the form opens, the blank fields can be populated. All fields that show a red asterisk (*) must be completed as these are mandatory fields:

- Click into the Nature of Expense field and enter either Travel or Lodgings. This is a free text field and must be manually typed. In the Amount (for contract) field enter the value of the claim. (This cannot be more than the expense value agreed in the Training Provider contract):

- Select MA from the Programme field, select the relevant contract from the list and the related Programme Expense Rule (depending on the type of claim):


- When all the fields have been completed, the Expense Type field will automatically populate. In this example, the Expense Type shows as Travel. Click on Save at the top of the screen. This action will refresh the screen and the Submit button will appear:

BULK EXPENSE AUTHORISATION : INFORMATION

Travel Example ☰

Submit

◀ **General**

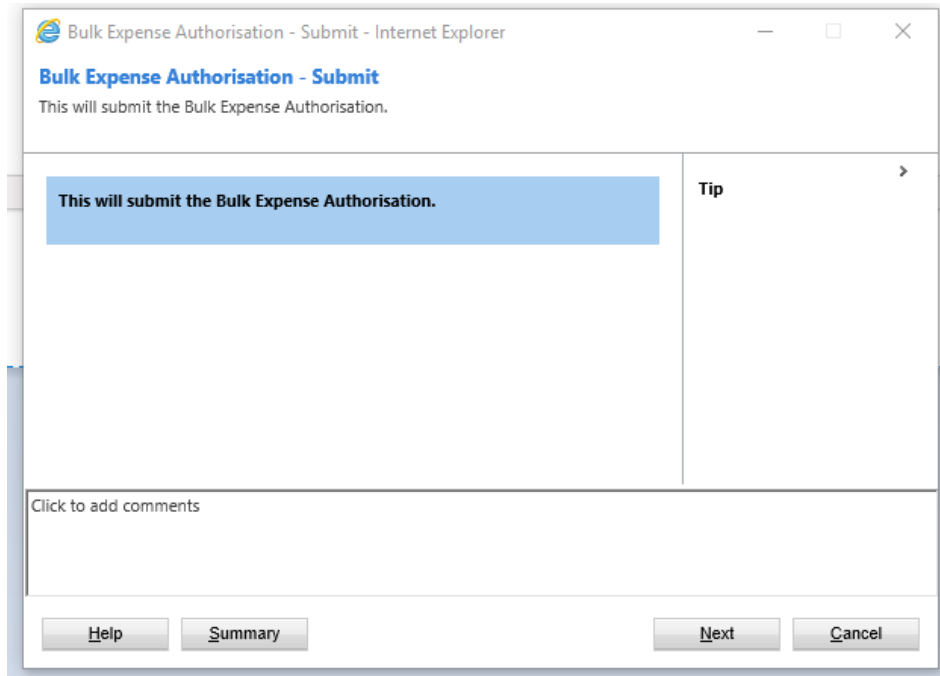
Nature of Expense *	Travel Example
Amount (for contract) *	£25.00
Programme *	MA
Contract *	NTP HUB DEMO ONLY - MA - 2018
Programme Expense Rule *	MA - Travel
Expense Type *	 Travel

- If the information selected is incorrect, this can be amended prior to submission. Hover over the field(s) and use the magnifying glass to lookup new records. Click on save to record any changes:

◀ **General**

Nature of Expense *	Travel Example
Amount (for contract) *	£25.00
Programme *	MA
Contract *	NTP HUB DEMO ONLY - MA - 2018
Programme Expense Rule *	MA - Travel
Expense Type *	 Travel

8. The dialog box will appear, click next > then Finish to submit to SDS for approval:



9. Once the Expense Authorisation has been submitted, the status reason shows as Submitted and the fields are locked which means no further changes can be made:

