

FIPS Quick Start Guide

ATP Process

This quick start guide provides an overview on how training providers can process a participant against the Apprenticeship Transition Planning (ATP) programme and make the relevant incentive claim on FIPS.

1. Ensure the participant assignment is marked as a leaver using the **redundancy** leaving code in FIPS. This is found under the unemployed option as the parent code, made redundant is then available as the leaving code. The video guide for entering leavers on FIPS can be found [here](#). Once leaving details are entered the assignment status will show as leaver (active).
2. If the assignment shows a leaver (archived) status, please contact FIPS Support using the help form to request the assignment be changed back to a leaver (active) status.
3. After completing the necessary approvals to proceed with the ATP process, update the leaving code on the assignment to the appropriate ATP leaving code. The guidance video [here](#) covers how to update leaver information on FIPS. The required codes will be made available after selecting the unemployed parent code:
 - 309 - ATP < 6 months to expected end - milestones/outcome to claim
 - 310 ATP < 6 months to expected end - milestones to claim
 - 311 ATP - RPL only

The screenshot shows the 'MA Assignments' form in the Skills Development Scotland system. The form has a teal header with the Skills Development Scotland logo and a back arrow. Below the header, there are two main sections, each with an asterisk indicating a required field:

- The first section is titled 'Please Select your Parent Leaver Code. This will be used to filter the Child Leaver Code options.' It contains a dropdown menu with 'Unemployed' selected. The dropdown is highlighted with a black box.
- The second section is titled 'Please Select the Child Leaver Code, to be added to the form'. It contains a dropdown menu with the placeholder text 'Please select a value'.

At the bottom of the form is a 'Submit' button.

Note that in the instance of a third-party training provider completing this process a request will need to be sent to FIPS Support asking for the leaving code to be updated and the new Assignment transferred over to the new provider. The link to the FIPS support request form can be found [here](#).

- A new assignment will be auto generated by FIPS with the same details, excluding the employer and will require approval by SDS. The status of the new assignment will show as manual approval required and can be accessed via the individual contact area on FIPS.

Individual Eight
Individual - Contact

FIPS234 October Test
Owner

Summary Details Regional Details Files Related

CONTACT INFORMATION

First Name * Individual

Middle Name ---

Last Name * Eight

Email * test@test.com

Home Phone ---

Business Phone ---

Mobile Phone ---

Individual Type Participant

Applications Refresh

Programme Status Reason NI Number Participant Training Ca... Age at Start Occupation

No data available.

Assignments Refresh

Programme	Status Reason	Preferred ...	Assignmen...	National In...	Individual	Name (Loc
MA	Manual Approval ...	Email	---	J	Individual Eight	East Dur
MA	Leaver (active)	Email	New Start	J	Individual Eight	East Dur

- A new field, ATP Category will be visible on the assignment within the participant details section.

ATP Category ATP - RPL only

- Navigate to the update employer tab within the assignment. Use the employer search and search the following:
 - ATP - No Employer

Employer Name ATP

Company Number

Search Reset

Organisation Name	Company No.	Address	Status
ATP - No Employer		11 George Square 11 George Square GLASGOW G2 1DY	SELECT

Click Select to add the employer to the assignment

7. Scroll to the bottom of the page and use the employer contact search to search the following details:

First Name*

Last Name*

Email Address

First Name* Mobile Number

Last Name* Telephone Number

Email Address

Full Name	Employer Name
ATP No employer	ATP - No Employer

Click Select to add the employer contact to the assignment

↓

Select Employer Contact

8. For trainees who will progress through their remaining milestones and incorporate RPL (stage 4) as well. Navigate to the Participant History and current Employment Status tab on the assignment and update the prior Achievement field to RPL, click save.

Actions Actions (Canvas App) Training Provider Details Participant Details Update Equalities Information **Participant History and Current Em...**

SCQF Level Held +

Pre-Employment Status + On job/skills training course

Employed + Yes

Employment Status + Full Time

Employed Length +

Length of Unemployment +

Current Role Length +

SOC 2010 +

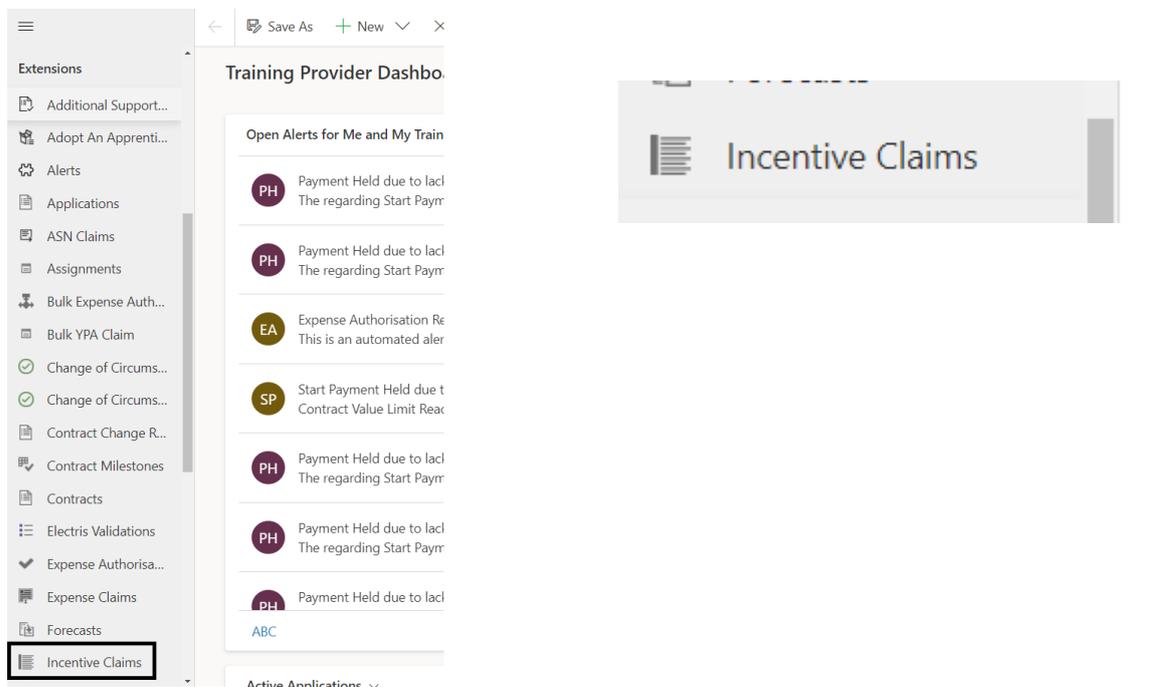
Job Title + ATP

Prior Achievement

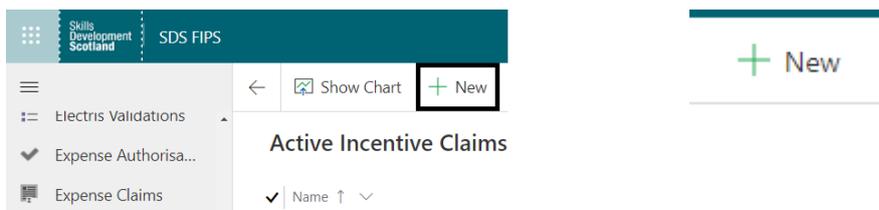
ATP Incentive Claim

The required evidence must be approved by SDS prior to submitting the incentive claim

9. The appropriate ATP incentive claim can be made on FIPS against the relevant trainee assignment. This can be processed by the current Training provider to the value of £400 or by the agreed third-party training provider to the value of £500.
10. Within the new assignment the incentive claim can now be made. This is a one-off claim per relevant assignment and the approval process, and the required evidence must have been completed before processing the claim on FIPS.
11. To claim the incentive payment, navigate to the incentive entity on FIPS:



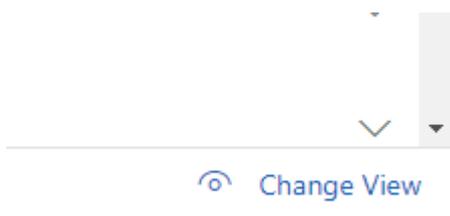
12. Click on new to open a new incentive claim form:



13. Within the general tab, the required fields will be displayed. Those marked with a red Asterix are mandatory. The locked fields displayed at the bottom of the table will be auto completed by FIPS once the relevant information has been added.

14. Use the search icon to select the relevant ATP incentive from the list (ATP or ATP Third Party)

Note: You can type the name of the incentive and include the wildcard search function to bring up specific results. Use the search icon to select the incentive from the drop down or use the Change View icon to search based on a specific view you have set up within that entity.



- Once the ATP incentive has been selected a new field will appear which will show the participant incentive claim limit. This will either show as £400 or £500 depending on the incentive selected.
- The Bulk claim field should be set to No.
- Complete the amount field which is a free text box. Note this can only have a value up to the amount shown in the participant incentive limit field.

Actions General

Incentive	*  ATP
 Participant Claim Incentive Limit	£400.00
Bulk Claim	* No
Claim Amount	* £400.00
Contract	* ---
Assignment	* ---

The claim amount cannot be higher than the value shown here

- Using the search options listed in step 5 select the relevant contract:

Actions General

Incentive	*  ATP
 Participant Claim Incentive Limit	£400.00
Bulk Claim	* No
Claim Amount	* £400.00
Contract	*  NTP HUB DEMO ONLY - MA - 2020
Assignment	* ---

19. Search for the individual's assignment using the participant name including the wildcard (*) this will ensure that the assignment status shows in the search. Ensure the confirmed assignment is selected

individual* six

Assignments

- Individual six - FIPS234 October Test - MA - 2020 - GN9A 46-Vehicle Body Repair & Alignment-SCQF 6**
Confirmed Assignment
- Individual six - FIPS234 October Test - MA - 2020 - GN9A 46-Vehicle Body Repair & Alignment-SCQF 6
Leaver (active)

+ New Assignment

Do not select the new assignment option. Use the search to find the relevant assignment already on FIPS, select the Assignment and save the form.

actions General

Incentive * ATP

Participant Claim Incentive Limit £400.00

Bulk Claim * No

Claim Amount * £400.00

Contract * NTP HUB DEMO ONLY - MA - 2020

Assignment *

Assignments

- TEST TEST - NTP HUB DEMO ONLY - MA - 2018 - GA00 22-Sport and Active Leisure: Operational Services-SCQF 5**
TEST TEST

+ New Assignment

[Reactivate Evidence](#)

Click save

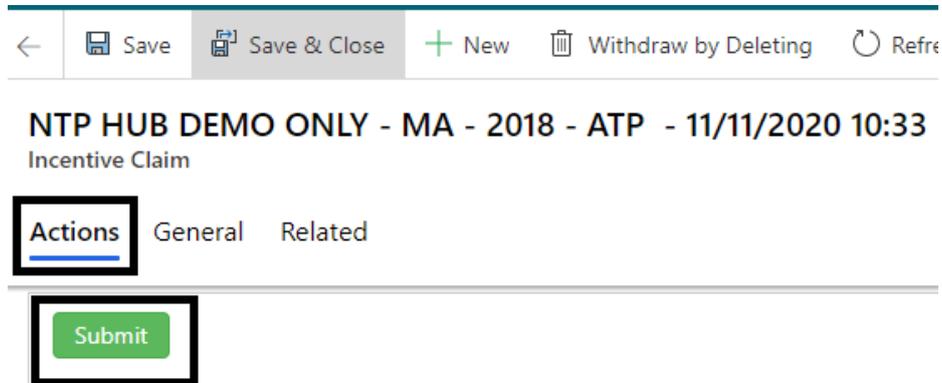
← Save Save & Close + New

New Incentive Claim

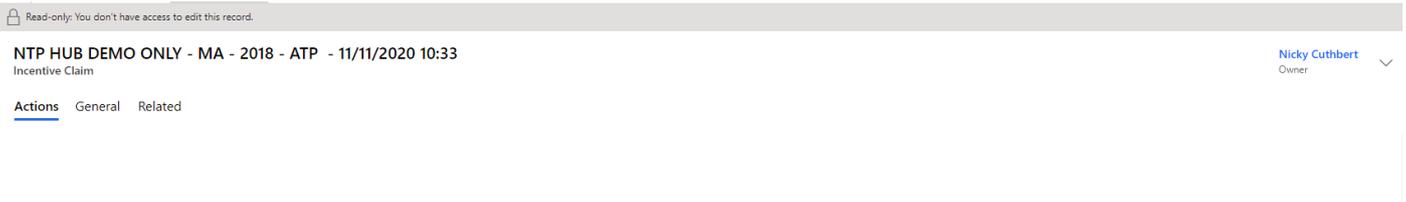
Actions General

Incentive * ATP

20. Navigate to the actions tab within the form and the submit button will be visible within this view. Click submit and approve the declaration to submit the claim.



21. Refresh your screen and a message advising that the record is read only is now displayed. The owner of the record will also have changed and the submit button will no longer be visible. The record is now with SDS and awaiting approval.



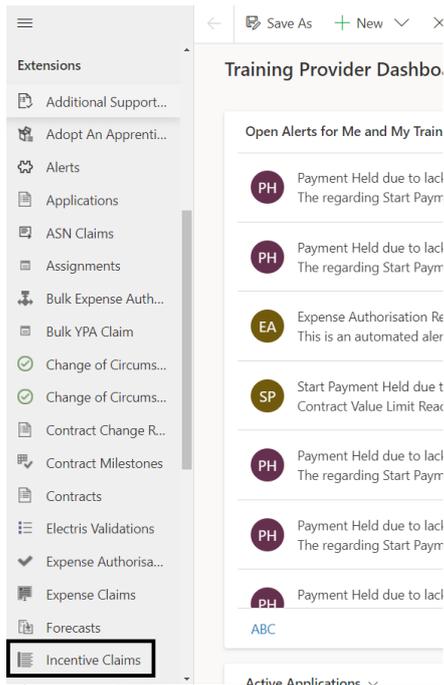
22. Once the record has been approved by SDS the payment will be transferred to the pre posting run to be processed by SDS finance on the Friday of that week. An Alert will also be received on the Training Provider dashboard to advise that the incentive has been approved.

Incentive Claim – ATP Access Fund

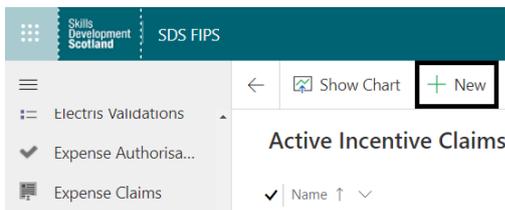
If the participant is eligible to apply for the ATP Access fund and the appropriate paperwork has been approved by the ATP Adviser ATPsupport@sds.co.uk the claim can be processed through the incentive entity on FIPS.

This can be processed up to the agreed value of the claim signed off by the ATP Adviser. This is a one-off claim per eligible assignment. The approval process and the required evidence must have been completed and approved before processing the claim on FIPS.

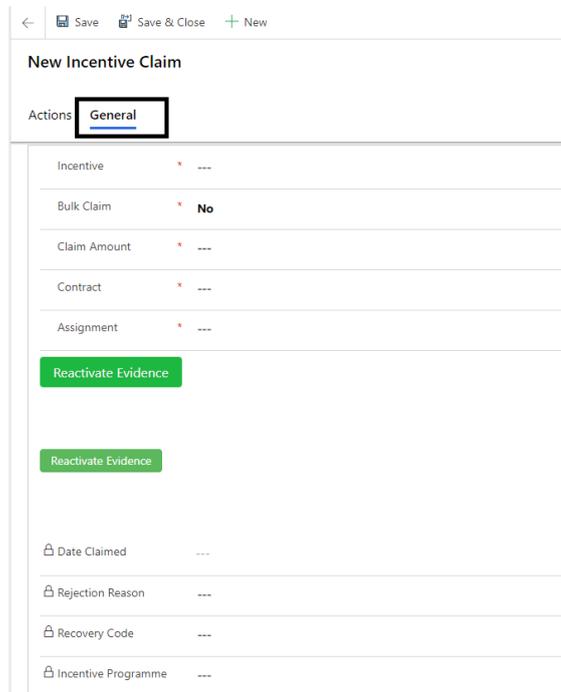
1. To claim the incentive payment, navigate to the incentive entity on FIPS



2. Click on new to open a new incentive claim form:

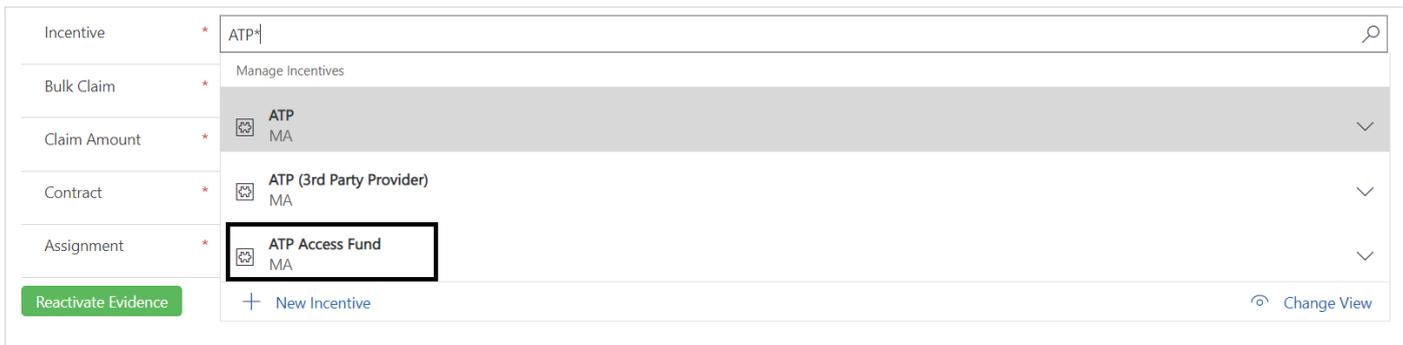


3. Within the general tab, the required fields will be displayed. Those marked with a red Asterix are mandatory. The locked fields displayed at the bottom of the table will be auto completed by FIPS once the relevant information has been added.



4. Use the search icon to select the relevant ATP incentive from the list (ATP or ATP Third Party)

Actions **General**



Note: You can type the name of the incentive and include the wildcard search function to bring up specific results. Use the search icon to select the incentive from the drop down.

5. Once the ATP incentive has been selected a new field will appear which will show the participant incentive claim limit as a locked field with no limit showing. The claim will be determined by the previously agreed amount.
6. The Bulk claim field should be set to No.

7. Complete the remaining fields and save

8. An evidence upload bar will be visible after the form has been saved. Double click to open the evidence request window

NTP HUB DEMO ONLY - MA - 2018 - ATP Access Fund - 11/02/2021 09:46
Incentive Claim

NTP HUB DEMO ONLY
Owner

Actions General Related

Bulk Claim	* No
Claim Amount	* £400.00
Contract	* NTP HUB DEMO ONLY - MA - 2018
Assignment	* TEST TEST - NTP HUB DEMO ONLY - MA - 2018 - GA00 22-Sport and Active Leisure: Operational Services-SCQF 5 ✕

Outstanding Evidence Refresh Run Report ⋮

✓ Name	Evidence Request Text	Type	Linked To	Payment Claim	Payment Plan
Evidence Required	Please upload the receipt(s) to validate t...	Document Upload	---	---	---

[Reactivate Evidence](#)

Double click on the white space to open the evidence request window, not the hyperlink.

9. Click on the paper clip icon to open your documents and select the relevant evidence to upload.

Evidence Required

Evidence · Submission (Training Provider) ⌵

Information Document Uploads Calling Record Related

Timeline + ⋮

Enter a note...

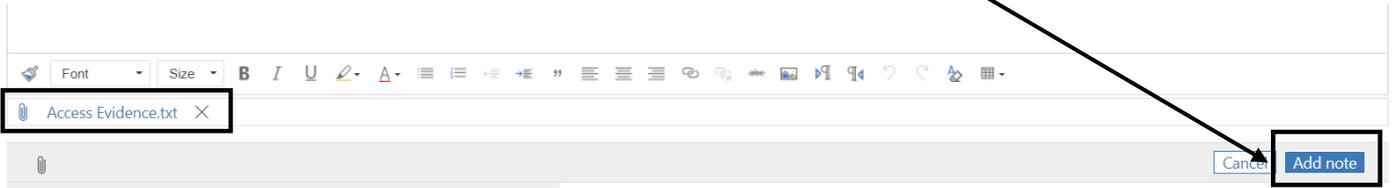
Filter by ✕

No filters available

Get started

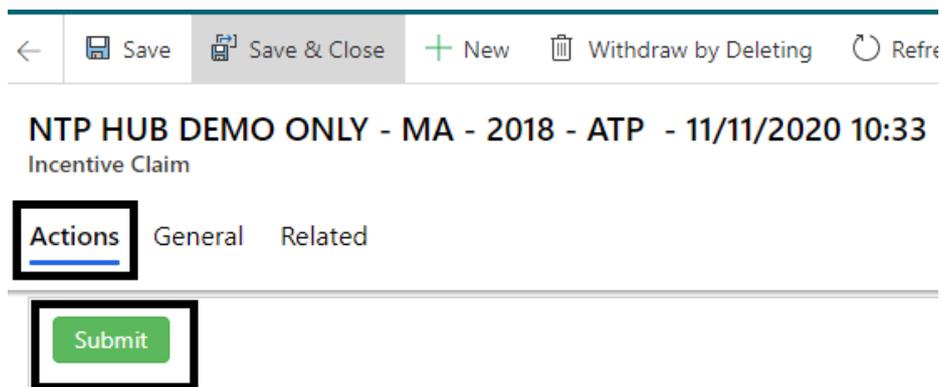
Capture and manage all records in your timeline.

10. Your Document will be visible within the upload window. **Click Add Note** to upload the document to FIPS.



Note: only one document can be selected at a time. If you require to upload more evidence, repeat steps 9 and 10 for each document to be added.

11. Use the back arrow to navigate back to the incentive claim. Click on the actions tab within the form and the submit button will be visible within this view. Click submit and approve the declaration to submit the claim.



12. Refresh your screen and a message advising that the record is read only is now displayed. The owner of the record will also have changed and the submit button will no longer be visible. The record is now with SDS and awaiting approval.

Active Incentive Claims Search this view

✓ Name ↑	Claim Amo...	Programm...	Training Provide...	Name (Incentive)	Bulk Claim	Individual	National In...	Status Reason	Date C
NTP HUB DEMO ONLY - MA - 2018 - ATP Acces	210.00	MA	NTP HUB DEMO ONLY. ATP Access Fund	No	TEST TEST	JT0000701	Awaiting A...	11/0/	

13. Once the record has been approved by SDS, the payment will be transferred to the pre posting run to be processed by SDS finance on the Friday of that week. An Alert will also be received on the Training Provider dashboard to advise that the incentive has been approved.