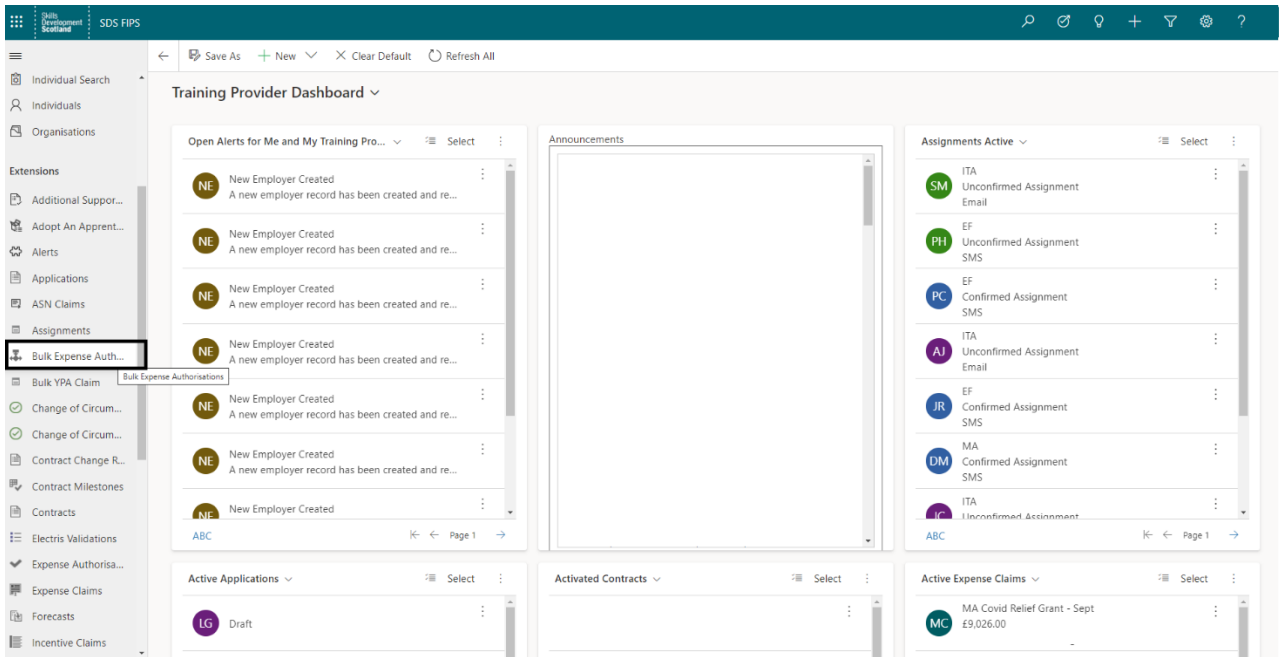


# FIPS QUICK START GUIDE

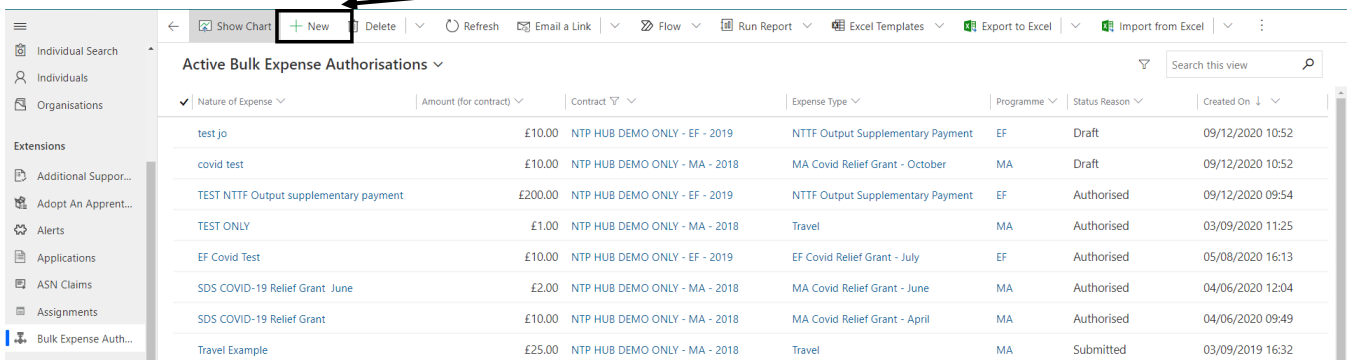
## STEM Bursary Claim Submission

This guidance document will cover how to create a Bulk Expense Authorisation and how to submit claims for STEM Bursary against this using the Expense Claim extension in FIPS.

### 1. On the Workplace Extension menu, select the Bulk Expense Authorisation entity:



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

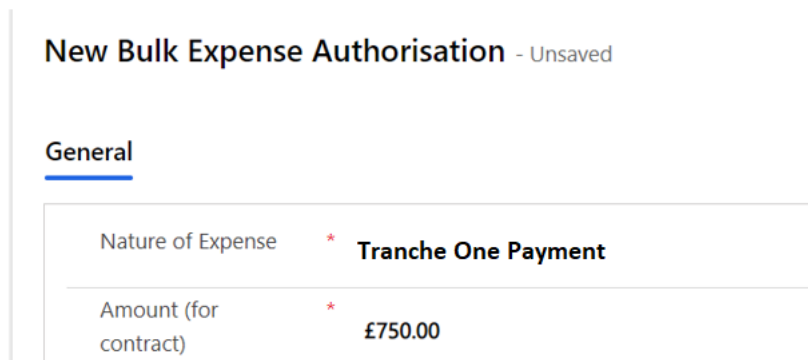


1. When the form opens, the blank fields can be populated. All fields that show a red asterisk (\*) must be completed as these are mandatory fields:



The screenshot shows a web form titled "New Bulk Expense Authorisation". The form is in a "Draft" status. Under the "General" tab, there are six input fields, each with a red asterisk (\*) indicating it is mandatory. The fields are: "Nature of Expense", "Amount (for contract)", "Programme", "Contract", "Programme Expense Rule", and "Expense Type". All fields are currently empty.

2. Click into the Nature of Expense field and enter the relevant information for the claim. This is a free text field and must be manually typed into, clearly indicating which tranche payment you are claiming for. In the Amount (for contract) field enter the value of the claim. (This cannot be more than the expense value agreed in the Grant Award letter:



The screenshot shows the same form as above, but now with data entered. The title is "New Bulk Expense Authorisation - Unsaved". Under the "General" tab, the "Nature of Expense" field contains the text "Tranche One Payment" and the "Amount (for contract)" field contains the value "£750.00". Both fields still have a red asterisk (\*) next to them.

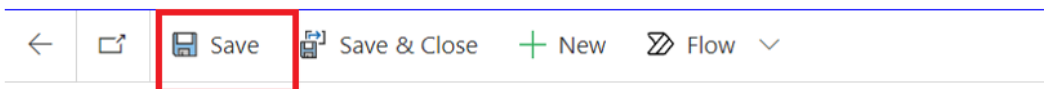
- Use the magnifying glass lookup to select STEM from the Programme field. Select the relevant contract from the list and the related Programme Expense Rule:

New Bulk Expense Authorisation - Unsaved Owner Draft Status Reason ▼

**General**

Nature of Expense	* <b>Tranche Payment One</b>
Amount (for contract)	* <b>£750.00</b>
Programme	* <b>STEM</b>
Contract	* <b>UNIVERSITY OF LIFE - STEM - 2021</b>
Programme Expense Rule	* <b>STEM - STEM Bursary Payment</b>
Expense Type	* <b>STEM Bursary Payment</b>

- When all the fields have been completed, the Expense Type field will automatically populate. In this example, the Expense Type shows as STEM Bursary Payment. Click on Save at the top of the ribbon bar:

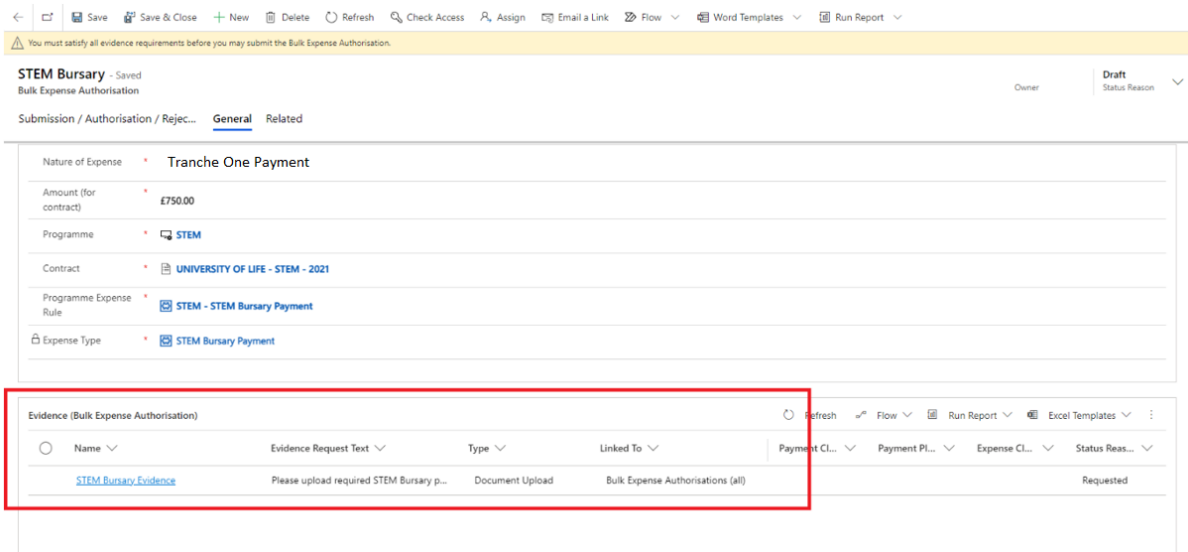


New Bulk Expense Authorisation - Unsaved

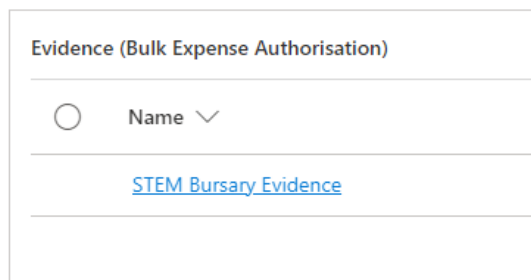
**General**

Nature of Expense	* <b>Tranche One Payment</b>
Amount (for contract)	* <b>£750.00</b>
Programme	* <b>STEM</b>
Contract	* <b>UNIVERSITY OF LIFE - STEM - 2021</b>
Programme Expense Rule	* <b>STEM - STEM Bursary Payment</b>
Expense Type	* <b>STEM Bursary Payment</b>

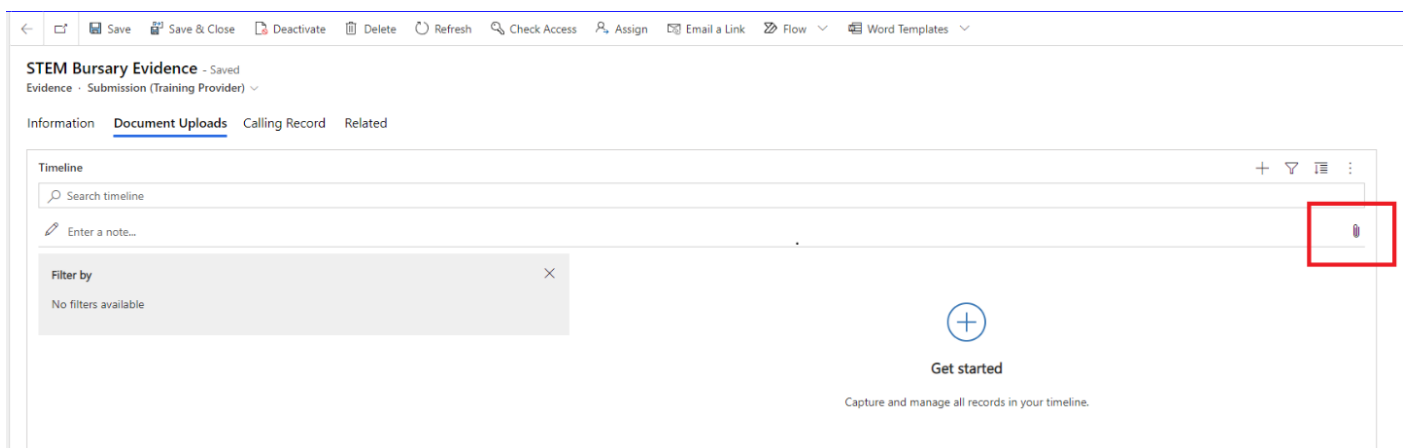
**5. The screen will refresh. Within the General tab, the evidence requirements will now be displayed:**



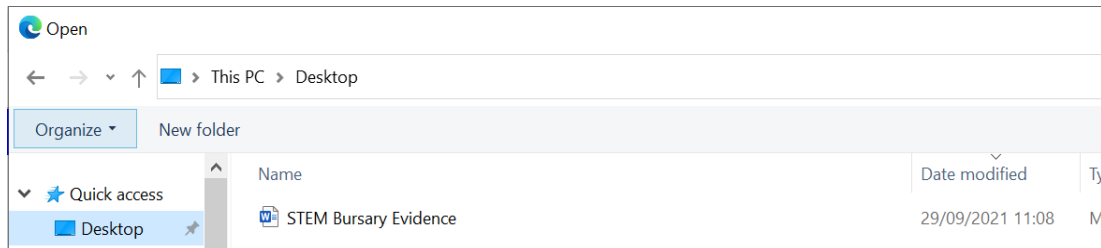
- Click on the hyperlink to open the evidence request:



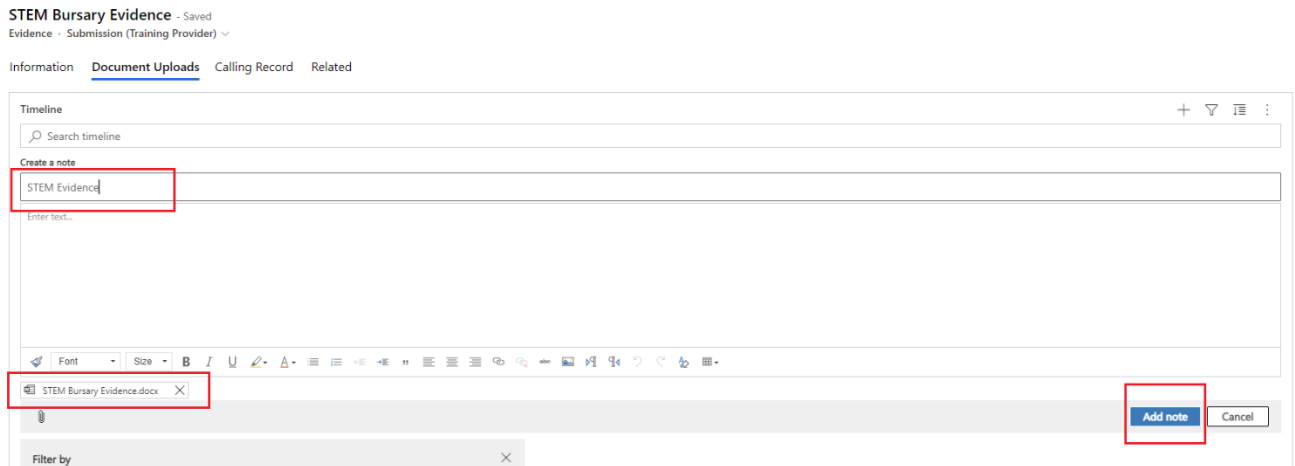
**6. The evidence upload screen will open. Use the paperclip to open the upload wizard:**



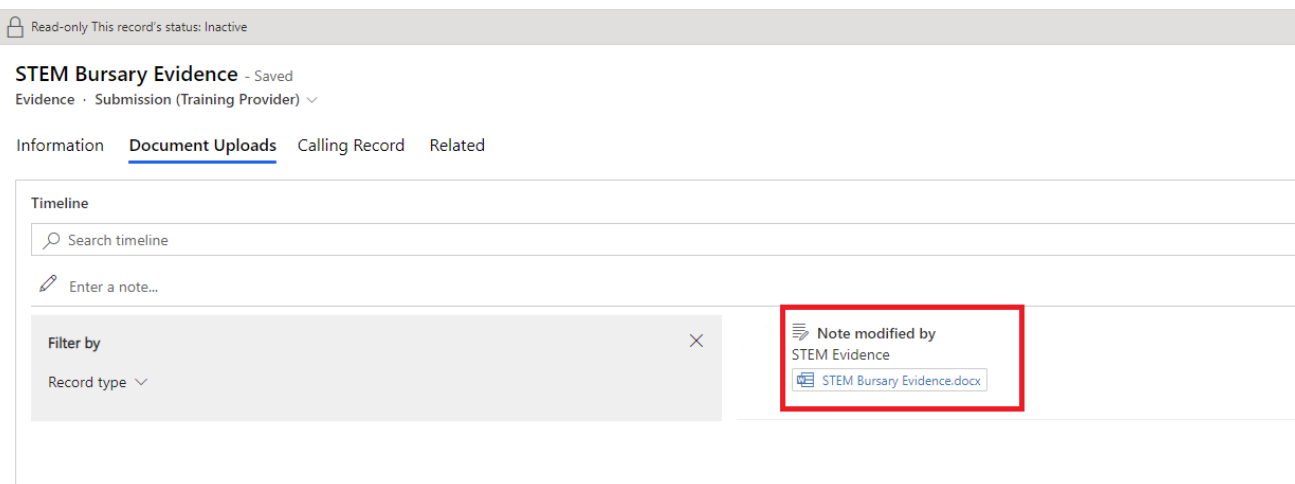
**7. Locate the approved STEM Bursary evidence – schedules one and two from the Grant Award letter - from your computer and select it to attach to FIPS:**



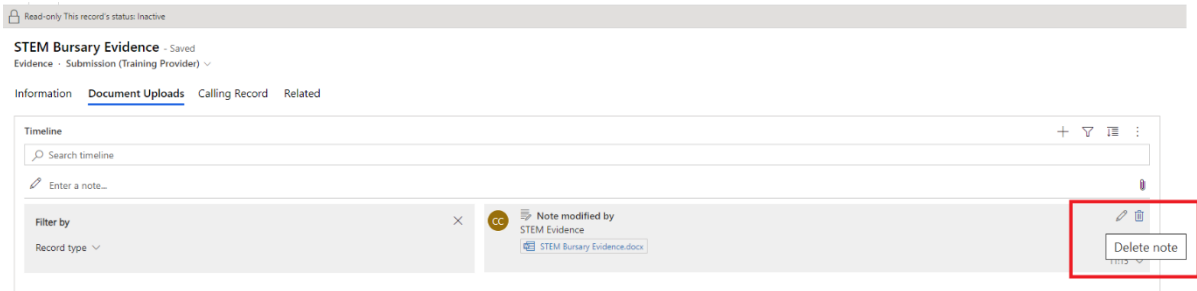
**8. Once added to FIPS, the document will appear within the upload wizard. Title the evidence upload then select 'Add note':**



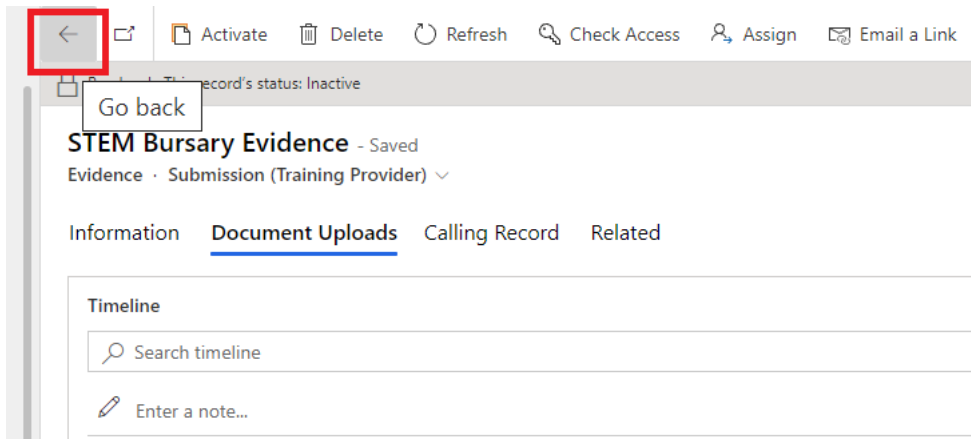
- If Add note is not clicked each time a document is selected, it will not be added to FIPS. Multiple documents can be uploaded and the steps above should be followed for each document. You cannot upload multiple documents in a single action.
- Once Add note has been clicked, the document will appear under the Document Uploads tab:



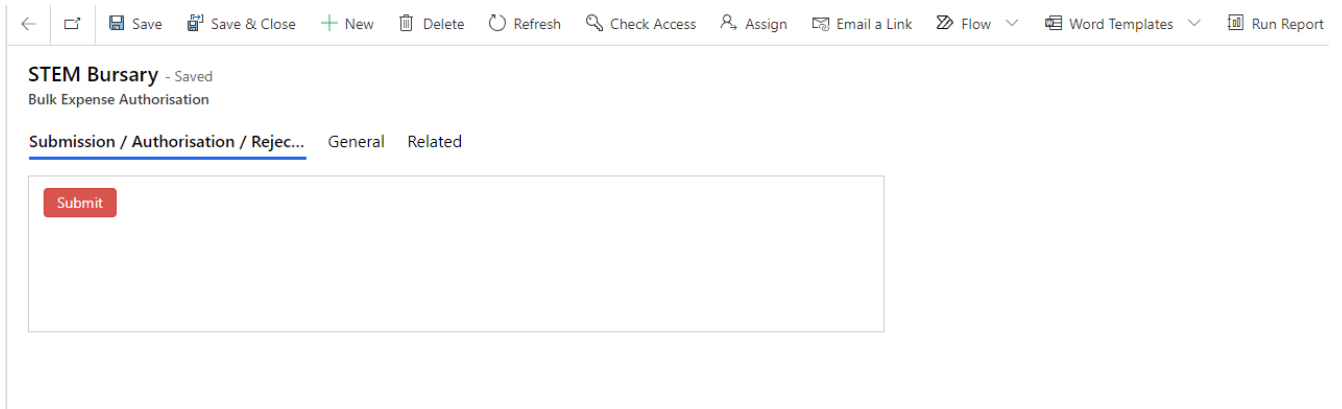
- If the incorrect document(s) has been uploaded, hover over the upload and the delete function will be displayed:



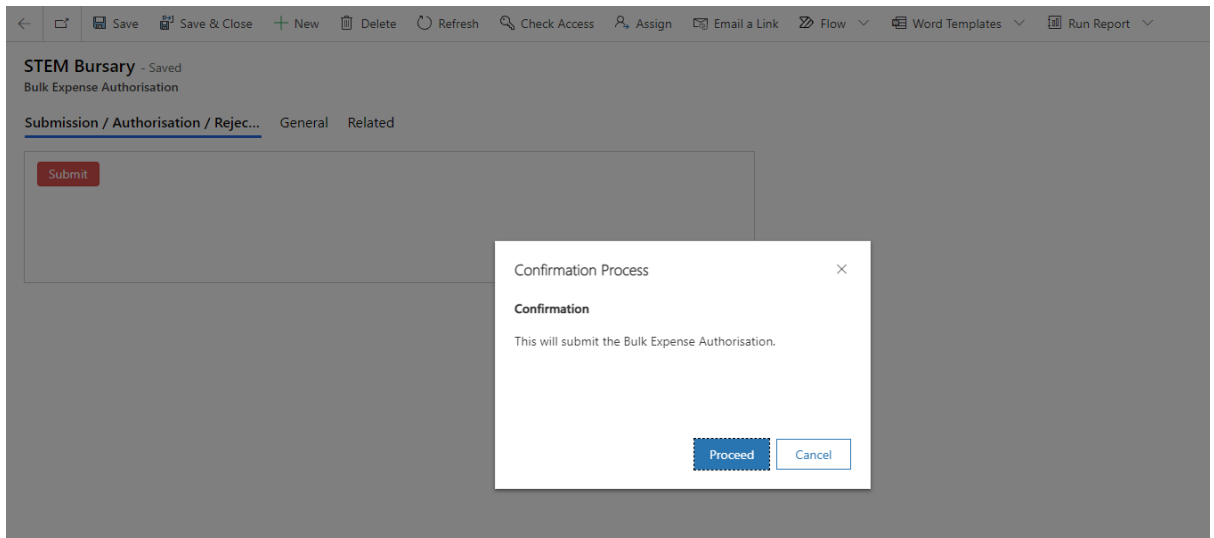
**9. Once the evidence upload is complete, click twice on the back arrow to return to the Bulk Expense Authorisation:**



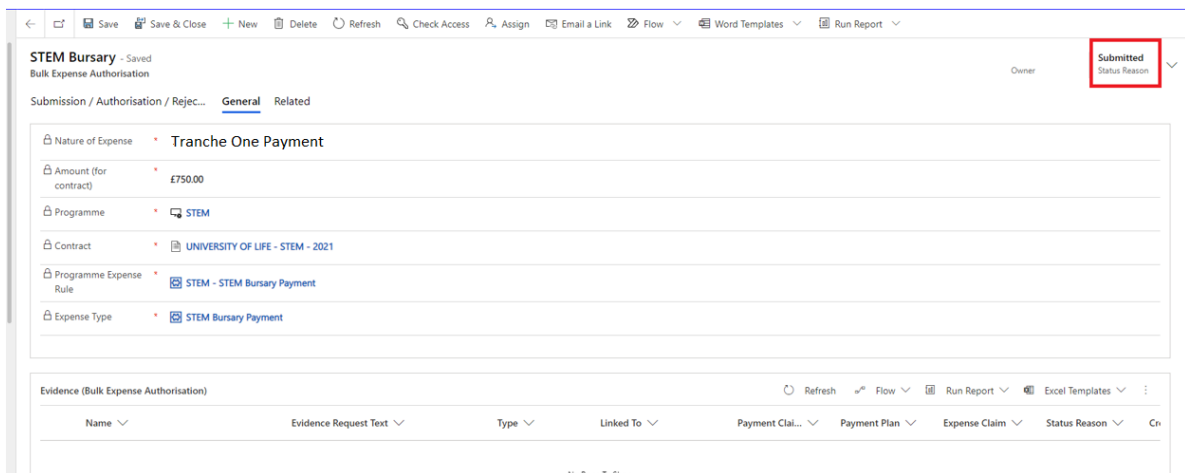
**10. When the form opens, click into the Submission / Authorisation / Rejection tab to submit the Bulk Expense Authorisation to SDS for approval:**



**11. Click on Submit. Click on Proceed to continue with the submission. Clicking on Cancel will leave the Bulk Expense Authorisation in Draft status:**



**12. Once the Bulk Expense Authorisation has been submitted, the status reason will show as Submitted and the fields will be locked. No further changes can be made and the Bulk Expense Authorisation will be approved or rejected by SDS:**



- Any changes made to the record by SDS will generate an alert on the Training Provider Dashboard.
- Once the Bulk Expense Authorisation has been approved, STEM bursary expense claims can be processed against this.

**13. To process a STEM bursary claim, click into the Expense Claims entity on the Workplace extension menu. When the screen loads, click on New:**

The screenshot shows the SDS FIPS application interface. On the left is a navigation menu with various entities. The 'Expense Claims' entity is highlighted with a red rectangular box. At the top of the main content area, there is a toolbar with several icons. The '+ New' icon is highlighted with a red rectangular box. Below the toolbar, the 'Active Expense Claims' table is visible, showing two rows of data.

Expense Description	Amount	Individual (Assignme...)	Expense Type	Status Reason	Decision Rationale
Lodgings & Travel for September 2021	£4,686.35	---	Travel & Lodgings	Approved	---
Travel and Lodgings	£1,790.00	---	Travel & Lodgings	Approved	---

**14. The Expense claim submission form will open:**

The screenshot shows the 'New Expense Claim' form. The form is titled 'New Expense Claim' and is part of the 'Expense Claim' entity under 'Expenses'. The 'General' tab is selected. The form contains several fields with dropdown menus and checkboxes. The 'Bulk Expense Claim' field is set to 'Yes'. The 'Owner' field is set to 'STEM TP'. The 'Young Persons Allowance Claim' field is set to 'No'. There are also sections for 'Evidence' and 'Outcome'.

**General**

Expense Description \* ---

Amount \* ---

From Financial Period \* ---

To Financial Period \* ---

Programme \* ---

Contract \* ---

Bulk Expense Claim **Yes**

Bulk Expense Authorisation \* ---

Expense Type \* ---

Owner \* [STEM TP](#)

Young Persons Allowance Claim **No**

**Evidence**

**Outcome**

Decision Rationale ---



15. All fields that contain an asterisk are mandatory and must be completed before the claim can be submitted. Input the description of the claim clearly indicating which tranche payment you are claiming for. Select the financial period for the claim; the from and to fields must be the same. The Bulk Expense Claim field must be set to Yes – the relevant Bulk Expense Authorisation can now be selected from the lookup. This must be the BEA that was created prior to submitting the claim. The value of the BEA and the value of the Expense claim must be the same.

New Expense Claim - Unsaved  
Expense Claim - Expenses

General

Expense Description *	Tranche one payment
Amount *	£150.00
From Financial Period *	Sep-21
To Financial Period *	Sep-21
Programme *	STEM
Contract *	STEM University - STEM - 2021
Bulk Expense Claim	Yes
Bulk Expense Authorisation *	Look for Bulk Expense Authorisation <input type="text"/>
Expense Type	Bulk Expense Authorisations <span style="float: right;">Recent records</span>
Owner	<div style="border: 1px solid red; padding: 2px;">             STEM Bursary - Tranche One Payment              £150.00           </div>
Young Persons Allowance Claim	<input type="button" value="+ New Bulk Expense Authorisation"/> <span style="float: right;">Advanced lookup</span>

- When the Bulk Expense Authorisation has been selected, the Expense Type field will auto populate. Once all the fields have been populated, click on Save:

← Save Save & Close + New Flow ▾

**New Expense Claim** - Unsaved  
Expense Claim · Expenses ▾

General

Expense Description *	Tranche one payment
Amount *	£150.00
From Financial Period *	Sep-21
To Financial Period *	Sep-21
Programme *	STEM
Contract *	STEM University - STEM - 2021
Bulk Expense Claim	Yes
Bulk Expense Authorisation *	STEM Bursary - Tranche One Payment
Expense Type *	STEM Bursary Payment
Owner *	STEM TP
Young Persons Allowance Claim	No

Evidence

## 16. Accept the declaration to submit the claim:

Change of Circum... Submission / Approve / Rejection General Related

Declaration

**AcceptDeclaration**

On behalf of the Provider I represent, I submit this claim on the basis that I am authorised to do so and confirm that: Expense claims are for legitimate travel and/or lodgings as appropriate and are in accordance with agreed contract terms. All documentary evidence required by the STEM Programme Rules pertaining to this claim match STEM Programme Rule requirements and can be uploaded to FIPS if requested by SDS within 1 Working Day.

Accept Declaration Do not accept Declaration

- The value of the claim will be added to the Pre-Posting run in FIPS awaiting payment. The claim will be transferred by SDS Finance the week following the claim submission. That completes the Bulk Expense Authorisation and claim submission process for the STEM bursary.